



Digital Work Jobtech Sector Scan 2025

Purpose of this deck



This publication presents a balanced perspective on digital work in Africa, emphasising the significant opportunity for strategic investment in jobtech platforms to unlock this sector's potential despite the major disruptions already in play. It aims to guide and inspire action among investors pursuing high-impact opportunities in digital jobtech platforms, funders supporting employment initiatives like the Jobtech Alliance, and innovators seeking to capitalise on Africa's rapidly evolving digital employment landscape.

Digital work in Africa encompasses a wide spectrum of employment models and opportunities—from freelance marketplaces and specialised gig platforms, to managed global business services (GBS) like knowledge and business process outsourcing (KPO and BPO). Recognising the unique dynamics shaping these different segments, we have applied a “platform lens” to examine how digital jobs are being created and expanded across the continent, the distinctive roles played by platforms, and the strategic potential for platforms to accelerate and sustain this growth.

Our Approach

We identified and analysed the key sectors where digital jobs are emerging, then closely examined how jobtech platforms can facilitate job creation within these sectors. To understand growth mechanisms, we conducted an in-depth exploration of specific sub-sectors, dissecting viable business models poised for scale and sustained impact. We went deep into the AI rabbit hole, exploring the levers for growth and constriction. Additionally, we mapped, interviewed and analysed over 80 prominent digital jobtech platforms across our target markets (Ethiopia, Kenya, Nigeria, Senegal, Uganda) to identify market trends, highlight standout opportunities, and uncover critical innovation gaps.

What's Inside This Deck:

- **Investment thesis & analysis:** Our perspectives on the strategic role of jobtech platforms in scaling digital work across Africa.
- **Platform taxonomy:** A structured framework categorising diverse digital jobtech platform business models including a comparison matrix.
- **Generative AI commentary:** Insightful analysis of how GenAI is transforming digital work, highlighting both critical disruptions and emerging opportunities.
- **Spotlight on promising platforms:** Concrete examples of leading African digital platforms demonstrating successful models and meaningful traction.
- **Future opportunities:** Strategic areas where platforms can unlock further potential and respond effectively to the evolving landscape—especially in light of Generative AI's accelerating impact.

1. Sector introduction: Digital Work

Introducing Digital Work



Global Business Services



Freelancing & Digital Gig Work

At the Jobtech Alliance, we categorise Digital work as employment opportunities mediated and delivered entirely online, enabling individuals to perform tasks remotely, often across borders. Unlike traditional offline work models, digital work is not limited by local purchasing power constraints and allows African talent to access lucrative global markets. This sector includes roles delivered entirely online, ranging from simple microwork tasks to complex, specialised knowledge outsourcing services. We haven't included the digital creative sector, which will be available in a standalone scan.

The sectoral stakes have never been higher. As digital transformation accelerates globally, driven by unparalleled impact from generative AI and shifting corporate models, we believe the sector is at an inflection point and that Jobtech platforms connecting African workers to global demand still represent a major economic opportunity whilst providing scalable pathways for employment growth across the continent.

To effectively capture the diverse opportunities and distinct dynamics within digital work, we've segmented the sector into two complementary yet clearly differentiated categories for ease of analysis.

1. Global Business Services
2. Freelancing & Digital Gig Work

1. Global Business Services

The world of outsourcing is rife with terms and acronyms that shape the sector. Global Business Services (GBS) refers to integrated outsourcing solutions that centrally manage both demand generation and service delivery, typically through specialised, dedicated teams. Within GBS, we've distinguished two subcategories:

1. Traditional **Business Process Outsourcing (BPO)**, focusing on routine, repetitive tasks such as customer support, data entry, and administrative functions, which historically provided mass employment opportunities, especially for entry-level African workers. According to Genesis Analytics, Africa's sector workforce stands at just over 1 million, representing 2% of global supply.
2. **Knowledge Process Outsourcing (KPO)**, which involves higher-value, knowledge-intensive tasks requiring specialised skills, judgment, and deep domain expertise, such as data analytics, healthcare compliance, and financial services.

At the Jobtech Alliance, we see the best GBS platforms running like well-oiled machines—blending smart technology, skilled teams, and seamless workflows to deliver high-quality Global services at scale. These platforms demonstrate continual investments in the right tools—AI-enhanced workflows, real-time quality control, and performance tracking—so global clients can trust them to deliver complex services efficiently.

The elephant in the room; It's clear that Generative AI (GenAI) is significantly reshaping this sector (more on that later)—rapidly automating many routine BPO tasks, while simultaneously amplifying opportunities within KPO by creating roles that leverage AI with human oversight, critical thinking, and strategic decision-making.



2. Freelance & Gig Work Platforms

Over the last decade, freelance and digital gig work platforms have transformed how Africans participate in the global labour market, offering individuals the ability to work independently, source their own demand, and deliver services remotely. This sector represents a clear shift away from traditional employment structures, providing workers with greater flexibility, autonomy, and access to international earnings.

Gig work has long been a pathway into digital employment, allowing individuals to take on short-term projects, develop new skills, and build global careers. It spans a wide spectrum—from basic microwork to higher value specialised gigs. While some freelancers operate independently, others rely on platforms that provide structured opportunities, payment security, and access to international clients.

This space is clearly evolving rapidly. Global demand for some digital services is surging, and African talent is increasingly recognised for its technical capabilities, multilingual flexibility, and competitive pricing. However, automation and AI are reshaping the sector, threatening lower-skill roles while expanding opportunities for those who can integrate AI into their workflow or offer non-automatable expertise.

The best African freelance and gig platforms are now more than just job marketplaces—they are becoming infrastructure hubs that support workers with career development, financial tools, and long-term sustainability. We think the future of the sector will be defined by how well platforms and individuals adapt to automation, upskilling demands, and new work models that blend AI with human expertise.



Is this Africa’s time to shine?



1	Favorable Demographics and labour Pool Growth	2	Cost Efficiencies with an Emerging Tech Talent Pool	3	Demand from Global Digital Transformation	4	Nearshoring Advantages	5	Multilingual Capabilities	6	Unsaturated markets	7	Shift Towards Ethical & Impact Sourcing
<p>Africa’s demographic trajectory presents a defining competitive edge: by 2045, nearly half of the world’s working-age population growth will come from the continent.</p> <p>As aging economies in Europe and Asia struggle with shrinking labour pools, Africa’s youthful, digitally connected workforce stands as a long-term solution for global talent shortages.</p>		<p>Africa remains one of the most cost-effective outsourcing regions, with companies increasingly diversifying beyond India and the Philippines.</p> <p>While cost differentials exist across African markets, this provides a spectrum of pricing and service models—offering flexibility for global firms seeking both premium and lower-cost outsourcing solutions.</p>		<p>As AI, automation, and cloud transformation reshape industries, demand for specialised services—software development, AI model validation, data analytics, and IT infrastructure—is soaring.</p> <p>Africa’s digital workforce is well-positioned to meet this need, offering scalable, high-quality talent at globally competitive rates.</p>		<p>Africa’s geographic and time-zone alignment with Europe makes it a prime nearshoring destination, enabling real-time collaboration without the operational frictions of distant offshore teams.</p> <p>This advantage, coupled with Africa’s growing multilingual capabilities, presents a strong alternative to Asia for European businesses.</p>		<p>With widespread fluency in English, French, and Portuguese, Africa offers a natural advantage in serving multilingual markets. This positions African BPO & KPO firms particularly well for European and North American clients seeking seamless customer engagement, compliance support, and content localisation.</p>		<p>Unlike saturated outsourcing hubs, Africa’s digital labour market remains largely untapped, allowing companies to build dedicated, high-performing teams with reduced competition.</p> <p>Specialised skills in AI-augmented workstreams and high-value outsourcing niches will further solidify Africa’s role in the global economy.</p>		<p>We believe there is increasing demand for socially responsible outsourcing models, and Africa’s young workforce offers a compelling opportunity for impact sourcing.</p> <p>Ethical BPO, where workers receive fair wages and long-term career growth, can set Africa apart from other regions</p>	

The background image shows a person from behind, sitting at a desk in a dimly lit room. A desk lamp is on the left, casting a warm glow. The person is looking at a laptop screen which displays data visualizations. To the right of the laptop is a tablet standing on a small stand, showing a stylized, low-poly face with the letters "AI" below it. The entire image has a warm, orange-brown color overlay.

2. On Generative AI's Impact on the Sector

The Uncertainty of GenAI — Navigating Uncharted Territory

The ascent of Generative AI (GenAI)—and recently the surfacing of powerful AI agents—is not merely a technological leap; it represents a fundamental reconfiguration of the global labour market.

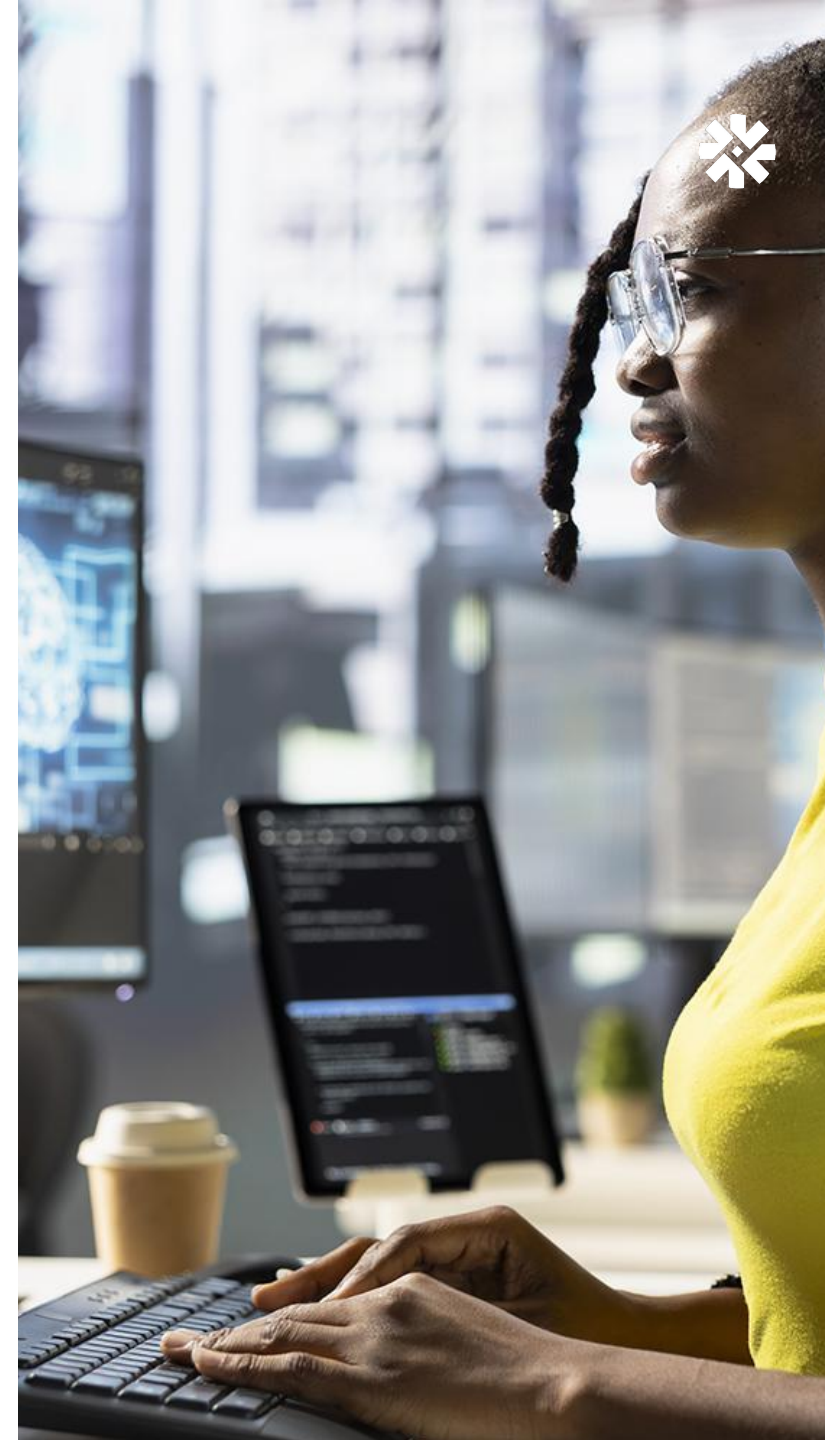
Today, we stand at the edge of unprecedented uncertainty. Historically stable assumptions about the resilience of digital jobs are unraveling rapidly, repeatedly disrupted by innovations like GPT-4, o1, DeepSeek, and Manus. Even the most informed experts, from OpenAI to Anthropic, openly acknowledge the limits of forecasting these changes, leaving the labour-market implications speculative at best.

For Africa, this uncertainty is magnified by structural vulnerabilities such as limited digital infrastructure, prohibitively high connectivity costs, and significant skill gaps. These barriers risk leaving African digital workers disproportionately sidelined as the global workforce landscape shifts overnight.

Recognising this profound uncertainty demands from us at the Jobtech Alliance; a strategic humility—one focused not on static predictions, but on cultivating resilience, adaptability, and continuous evolution within our digital workforce.



the surfacing of powerful AI agents—is not merely a technological leap; it represents a fundamental reconfiguration of the global labour market.



GenAI's Disruptive Impact on African Digital Jobs



GenAI's disruptive potential is both immediate and structural, especially for Africa's historically significant digital entry-level jobs in sectors like customer service, basic moderation, microwork, and data entry. These roles have been vital stepping-stones, especially for women and youth, yet they now face rapid erosion (such as [Klarna's AI assistant doing the work of 700 humans](#)), driven by the relentless capabilities of advanced GenAI and AI agents capable of executing repetitive tasks with unprecedented speed and precision.

This shift isn't theoretical—it's already unfolding, reshaping sectors in months rather than years. Traditional BPO models face existential threats, with labour-intensive roles swiftly automated or reshored to advanced economies through AI-driven Global Capability Centers (GCCs).

Without strategic interventions in re-skilling, gender-responsive pathways (tailored programs designed to specifically address barriers faced by women, such as flexible training schedules, targeted mentorship, bias-free rating systems, and inclusive platform onboarding), and proactive workforce transition strategies, Africa risks widening its digital and socioeconomic divides. The window to proactively manage these transitions and safeguard livelihoods is quickly narrowing, demanding immediate, focused action.

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One virtual assistant firm told us they've never had more demand—not because of fewer tasks, but because one worker, paired with GenAI, can now replace what used to require five distinct skill sets. The AI makes the role more powerful—but also more demanding.

We do see an AI Opportunity: AI-Augmented Digital Work



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In our portfolio, platforms like AfricaAI and Avala are already structuring “human-in-the-loop” teams that review and improve AI outputs, especially in sensitive sectors like financial modeling, auto, trust & safety, and AI training.

Yet amidst profound disruption GenAI still presents significant opportunities for Africa to reshape its role in the global digital workforce.

Rather than displacing humans outright, AI Agents—advanced systems capable of autonomously executing tasks—hold powerful potential to augment human capabilities, particularly in sectors requiring specialised judgment, ethical oversight, and cultural context.

In areas like Specialised KPO, Staff augmentation, verticalised freelance and microwork roles, AI can greatly enhance productivity and quality, creating resilient, high-value employment opportunities.

Capturing these opportunities demands intentional design from African jobtech platforms, integrating continuous upskilling, adaptive workflows, and robust human-in-the-loop systems.

The path forward is clear: proactive investment in infrastructure, skills, and strategic human-AI collaboration will determine whether Africa merely weathers GenAI’s disruption—or leverages it to establish lasting global competitiveness.

3. Digital Work platform taxonomy

A shared Jobtech – Digital Work taxonomy



Global Business Services

Staff Augmentation	Traditional Outsourcing (BPO)	KPO Outsourcing
Technical Augmentation	Entry Level IT enabled service (ITeS) roles	ITeS & Tech related KPO
Non-technical Augmentation	AI & Data Labelling	Verticalised, Industry Specific KPO
	Front & Back-office roles	Horizontal KPO



Freelance & Digital Gig Work

Horizontal Freelance Marketplaces	Verticalised Freelancers	Microwork
Technical gig platforms (ITeS)	Specialised Freelancers	AI microwork
Creative gig platforms	Language learning	Distributed research & Survey
Professional service gig platforms	Mentorship & online tutoring	
Virtual assistance gig platforms	Telehealth & medical	



Global Business Services: Sector and sub-sector 'Jobtech' definitions



Global Business Services		
Staff Augmentation	Traditional Outsourcing (BPO)	KPO Outsourcing
Entities providing temporary or contract staff to supplement a company's workforce, typically to support specific projects, address skill gaps, or meet short-term demand spikes. Usually involves specialists across IT, engineering, and administrative functions without permanent commitments.	Platforms enabling remote (offshore or nearshore) teams to deliver transactional, repetitive services requiring minimal training and oversight. This scan focuses on smaller, non-traditional outsourcing models rather than large-scale incumbents, which typically operate outside the Jobtech platform lens.	Entities offering specialised outsourced talent with deep domain knowledge, leveraging human expertise enhanced—but not replaced—by AI technologies.
Technical Augmentation Providers of contract and project-based, skilled technical talent—software developers, data engineers, and network specialists—delivering high-value skills flexibly as client needs evolve.	Entry Level IT enabled service (ITeS) roles Providers of basic outsourced tech talent for routine or short-term ICT tasks, typically entry-level and lower in the complexity scale.	IT Enabled Services & Tech-related KPO Entities offering specialised talent with deep domain knowledge, leveraging human expertise enhanced—but not replaced—by AI technologies.
Non-technical Augmentation Providers offering flexible staffing for routine, non-technical tasks such as sales support, administrative duties, and customer service. These roles help businesses scale efficiently, filling operational gaps without long-term hires.	Front & Back-office roles Routine, entry-level positions providing support for core business functions such as customer support, finance, HR, and general administration.	Verticalised Industry Specific KPO Advanced providers focused on software development, data analytics, cybersecurity, and AI integration. These firms offer highly specialised services closely integrated with clients' existing infrastructure.
	AI Data Labelling Platforms specifically providing human-annotated datasets essential to training AI and machine learning models. Despite automation trends, demand remains robust due to the ongoing need for human insight in refining AI accuracy, bias correction, and nuanced interpretation	Horizontal KPO Providers of both generalised and specialised cross-sector expertise in flexible, knowledge-driven roles—such as market research, content moderation, and strategic consultancy—often culturally aligned with major client markets (e.g., Europe).



Freelance & Digital Gig Work: Sector and sub-sector 'Jobtech' definitions



Freelance & Digital Gig Work		
Horizontal freelance marketplaces	Specialised / Verticalised Freelancers	Microwork
Platforms enabling skilled professionals to independently find part-time freelance opportunities. Characterised by algorithm-driven matching of global talent with diverse client demand.	Platforms connecting freelancers with specialised skills in targeted vertical markets, particularly health and education sectors, providing services primarily through digital channels.	Platforms connecting semi-skilled workers to discrete, algorithmically assigned microtasks, addressing global demand for scalable, task-based digital labour.
Creative, technical & virtual assistance gig platforms Often dominated globally recognised marketplaces (e.g., Fiverr, Upwork) providing two-sided platforms where freelancers offer creative (design, writing), technical (software development), and virtual assistant services.	Language learning platforms Digital platforms that leverage AI tools and expert freelancers to teach languages, tailored specifically to Africa's multilingual contexts and international demand for language proficiency.	AI microwork Distributed microtasking platforms, often providing AI-enabled tasks essential to AI model training, tapping into Africa's sizable semi-skilled workforce.
	Mentorship & online tutoring Online platforms connecting learners with industry professionals for personalised, expert-led training in diverse professional fields.	Distributed research & survey Leveraging Africa's extensive mobile-connected workforce to collect granular, real-time data for market research, consumer insights, and localised field data. Sometimes includes blockchain based earning models.
	Telehealth & medical Platforms enabling freelance medical professionals to provide remote consultations, diagnostics, transcription, and clinical documentation, addressing global healthcare staffing needs.	

Comparing Digital Work Sectors



















































This heatmap evaluates key digital work sectors across critical dimensions—Income, Scale, Stability, Inclusivity & Gender—and also provides brief commentary on how Generative AI (GenAI) will reshape these areas through automation, augmentation, and new job creation. This is based on both global automation data and direct African platform observations

Sector	Income Potential (\$\$\$)	Scale (Job Volume)	Stability (Job Security)	Inclusivity (Access to Entry)	Gender Pathways	GenAI Impact Commentary (Automate, Augment, Create)
Staff Augmentation	Medium-High (specialised tasks)	Medium (project or ad-hoc)	Medium (cyclical contracts)	Medium (skill-based, but less competitive)	Growing inclusion, targeted upskilling	Augment & Create – Some routine tasks automated; specialised roles still vital.
Traditional Outsourcing	Medium-Low (cost-driven, routine roles)	High (millions of jobs historically)	Medium (declining with automation)	Medium-High (mostly basic skill roles)	High history, automation risk	Automate – Major elimination risk; minimal scope for augmentation.
AI Data Labelling	Medium (competitive, moderate pay)	Medium-High (massive global demand)	Medium (short term opportunities)	High (Easy digital access)	High now, uncertain without upskilling	Automate & Create : Short-term growth, automation threat
Specialised KPO	High (above-average, specialised)	Low (growing)	High (long-term, specialised skills)	Low (advanced expertise needed)	Untapped, high future potential	Augment – AI boosts roles; skilled human oversight thrives.
Freelance Marketplaces	Medium (varies, highly competitive)	High (millions of freelancers)	Low (project-based instability)	Medium-Low (requires skills, reputation)	Good access, pay gaps remain	Automate & Create – Routine gigs automated; high-value freelancers must reposition.
Specialised Freelancing	High (specialised & premium roles)	Low (highly specialised)	Medium (stable in the niche)	Low (domain expertise, credibility)	Strong potential, targeted inclusion needed	Augment – AI expands capabilities, but human oversight remains critical.
Microwork	Low (task-based, variable)	High (millions of tasks)	Low (highly vulnerable to automation)	High (very few skill barriers)	Accessible entry, uncertain future	Automate – Shorter-term demand but long-term displacement risk.



Global Business Services: Market map of platforms



Global Business Services		
Staff Augmentation	Traditional Outsourcing (BPO)	KPO Outsourcing
Technical Augmentation      	Entry Level IT enabled service (ITeS) roles       	IT Enabled Services & Tech-related            
Non-technical Augmentation    	Front and Back-office roles*     	Verticalised Industry Specific KPO     
	AI Data Labelling      	Horizontal KPO   

* includes CX, but only highlighting newer Jobtech platforms



Freelance & Digital Gig Work: Market map of platforms



Freelance & Digital Gig Work		
Horizontal freelance marketplaces	Specialised / Verticalised Freelancers	Microwork
<p>Creative, technical & virtual assistance gig platforms</p>		<p>AI microwork</p>
	<p>Language & learning platforms</p>	<p>Distributed research & survey</p>
	<p>Telehealth & medical</p>	

4. Sector analysis

Digital Work, Thoughts on the sector



Africa's digital work landscape is at a pivotal juncture. The global demand for remote digital services is growing, yet the manner in which African talent accesses this opportunity matters enormously.

While African freelance marketplaces have expanded, they face significant structural constraints. Global competitors like Fiverr and Upwork drive fierce international competition, often creating a race to the bottom that undervalues African talent. Such platforms provide challenging entry points for newcomers, requiring pre-existing reputations, refined soft skills, and extensive networks—advantages often inaccessible to emerging African workers. The rapid adoption of AI further complicates this, threatening the viability of routine freelance tasks.

In sharp contrast, we believe Global Business Service (GBS) platforms offer a fundamentally superior model for sustainably scaling Africa's digital workforce. GBS platforms provide structured entry points, actively managing global demand generation, quality control, and training.

They enable African talent to compete globally through trusted teams rather than isolated individuals. **We also see a clear natural progression:** individuals who start careers within structured GBS environments can later transition successfully into freelance or remote roles, whereas the reverse rarely occurs.

Within the GBS realm, we believe the most successful platforms will operate in niche, high-value skills—where they actively participate in upskilling talent—or those effectively able to productise talent for fractional roles and specific industry verticals. Individually, these companies may be smaller, but collectively they have the potential to significantly shape Africa's digital workforce.

Additionally, we acknowledge that distributed gig and microwork platforms will continue playing an important role in Africa's digital employment landscape. Platforms best positioned to succeed here are those leveraging geographic diversity and localised capabilities, such as distributed research and local data collection, where physical presence provides competitive advantage.



Global Business Services Sector Analysis and Trends

The Market

- **Automation's existential threat to African BPO is already here:** Traditional BPO faces rapid disruption from GenAI. Jobs historically held by millions, particularly entry-level roles occupied by women are disappearing far faster than previously projected. While some industry commentators maintain optimism, suggesting roles in customer satisfaction and other human-centric tasks may remain robust (indeed, some global firms continue reallocating resources to African BPO centers), we view traditional GBS roles as higher risk.
 - Reshoring and in-house AI operations are shrinking traditional outsourcing: GenAI is clearly accelerating reshoring, with enterprises increasingly choosing AI-enhanced, in-house solutions or shifting to Global Capability Centers (GCCs).
 - AI opens new outsourcing opportunities: We are seeing a growing global SME openness to flexible, AI-supported staffing models presents fresh opportunities for specialised African providers.
- **AI training data work is a lifeline:** Despite automation displacing many roles, AI training itself requires massive amounts of human-validated data—creating a shorter-term window of employment opportunity. However, these roles, such as content tagging, bias detection, reinforcement learning, remain lower-paid and undervalued. African platforms must reposition AI data work as skilled, dignified labour to ensure sustainable benefits.
- **Africa's strategic advantages remain under-tapped, offering substantial room for growth:** Africa's proximity, multilingual workforce, real-time collaboration advantage, remain significantly underleveraged—particularly given Europe's unprecedented labour shortages.





Global Business Services Sector Analysis and Trends



Business models

- **Nimble, specialised platforms will outperform traditional BPO models:** Smaller, agile providers can pivot quickly, addressing niche global demands and rapidly evolving client needs better than traditional large outsourcing centers.
- **AI + human collaboration:** Platforms effectively blending AI tools & human judgment into compelling service packages will have a strong competitive edge.
- **Effective sales require presence in source markets:** Platforms seeing strongest growth typically establish their commercial teams directly within North America and Europe, close to demand sources.

Skills, infrastructure and policy

- **The skills gap is a massive and growing liability:** Africa remains severely underprepared for the shift towards high-value KPO. The workforce lacks advanced technical skills such as AI supervision, data analytics & cybersecurity, Existing educational infrastructure lags behind global market demands, and urgent investment in targeted GenAI-aligned training is essential to close this gap.
- **Infrastructure limitations remain a critical competitive barrier:** Persistent infrastructure challenges—unreliable internet connectivity, inconsistent power supply, and slow adoption of enterprise-grade technologies—continue to significantly limit Africa's ability to scale and compete globally
- **Policy as a critical driver of GBS sector success:** Country-level policy will significantly influence Africa's GBS trajectory. Governments enabling infrastructure development, targeted digital skills initiatives can unlock substantial growth.

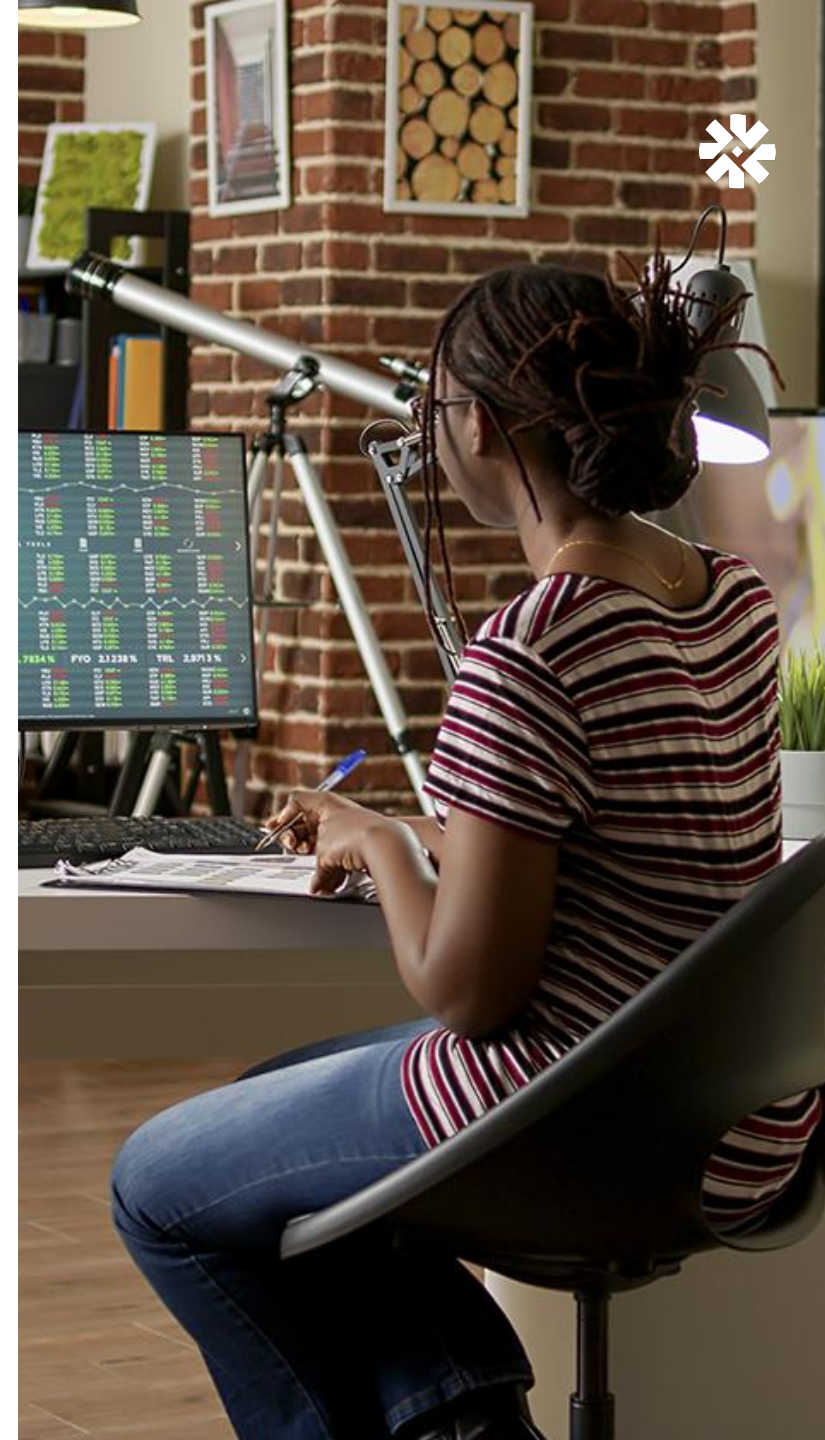




Global Business Services Sector Analysis and Trends

Users

- **Automation could dramatically deepen gender inequality:** Automation disproportionately threatens roles occupied by women—often stable, contractual full-time positions with decent pay. To avoid exacerbating existing disparities, platforms must deliberately implement gender-responsive upskilling programs





Freelancer & Gig Work Sector Analysis and Trends

The Market

- **Low-data-sensitivity roles are accessible but highly competitive:** African freelancers naturally thrive in creative, design, content moderation, and related roles with lower regulatory and compliance demands. However, intense global competition in these markets often leads to significant downward price pressure, reinforcing the need for clear differentiation and specialised skills.
- **Demand for freelance roles is shifting toward AI-augmented human skills:** Routine freelance roles are rapidly disappearing. Demand is shifting toward tasks that integrate AI as an assistive tool rather than a replacement, emphasising skills like creative direction, AI model refinement, and nuanced moderation. Global freelance leaders, [including Fiverr](#), now actively pursue an integrated AI+human services model.
- **Human-in-the-loop freelancing will reshape high-value gig work:** AI-driven processes still require human judgment and oversight, significantly growing demand for freelancers in roles such as AI quality assurance, ethical model oversight, and bias detection.





Freelancer & Gig Work Sector Analysis and Trends



Business Models

- **Gig platforms can uniquely respond to traditional labour-market failures:** By innovating through fractional work, elastic job-sharing, and on-demand labour allocation, gig platforms directly address market inefficiencies like fragmented demand and employment rigidity, creating adaptable workforce solutions inaccessible to traditional employment models.
- **Vertical and specialised freelance platforms are emerging winners:** African freelancers increasingly move from price-driven global marketplaces toward specialised platforms serving niche, high-value sectors. These niche platforms provide freelancers with somewhat more stable career paths, premium pricing, and defensible reputations—protecting them against automation and commoditisation pressures
- **Distributed gig platforms that unlock local insights offer defensible value:** Platforms leveraging geographic and linguistic diversity stand out by delivering hyperlocal data, culturally specific content, and regionally relevant insights, making them essential for clients needing real-world contextual accuracy.
- **Talent clouds and fractional teams unlock cross-border scale:** Collaborative freelance ecosystems—fractional teams or ‘talent clouds’—are poised to become a dominant model, enabling freelancers to dynamically form teams, manage cash flow collaboratively, and collectively bid on high-value international projects





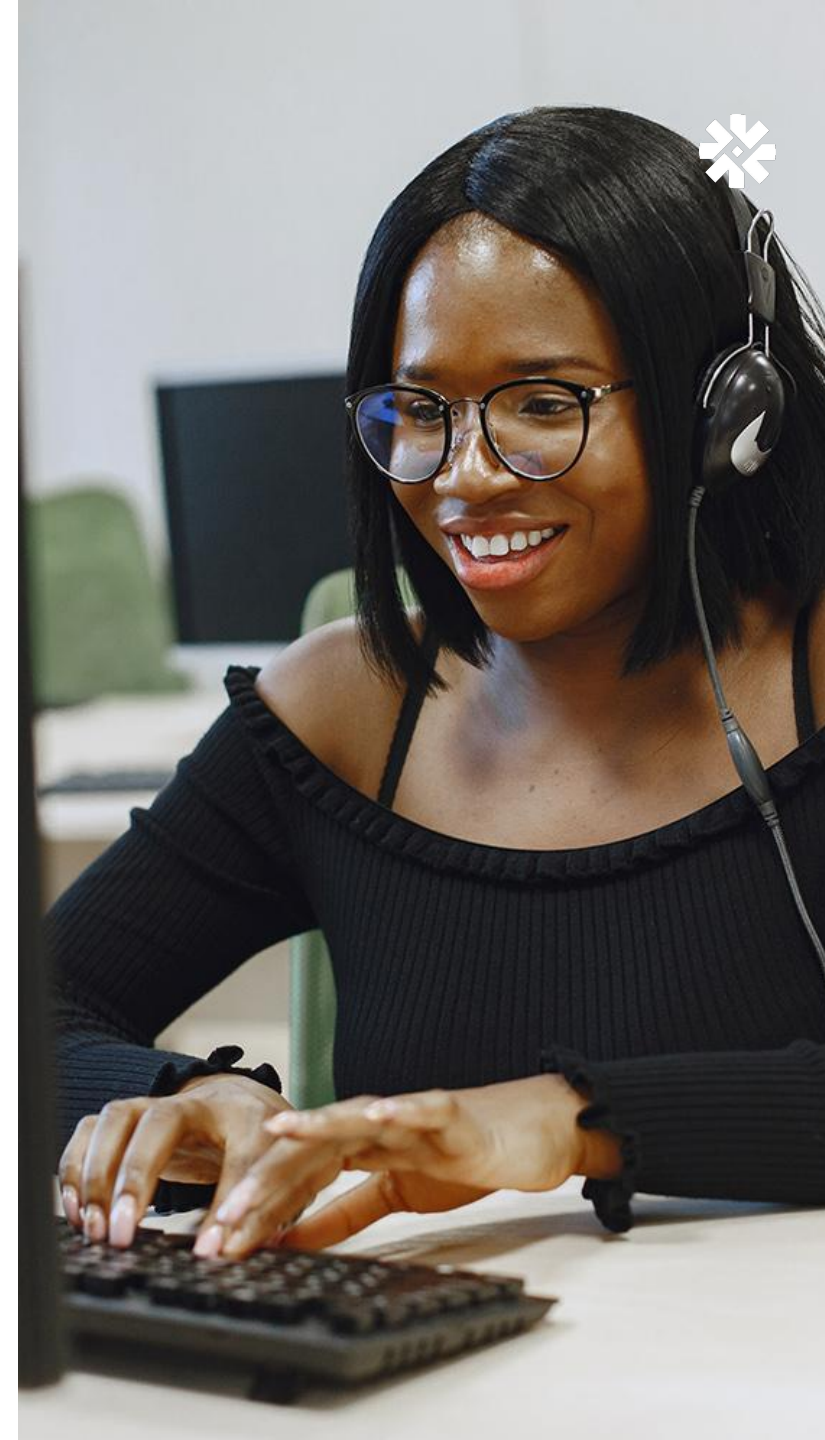
Freelancer & Gig Work Sector Analysis and Trends

Skills, infrastructure and policy

- **Structural barriers significantly constrain freelance potential:** Despite global market access, African freelancers face substantial structural hurdles, including high data costs, biased rating algorithms, stark gender wage disparities, financial exclusion, and a severe lack of accessible asset financing. Addressing these systemic barriers is crucial to unlocking sustainable freelance growth.
- **Lack of asset financing remains a critical growth barrier:** Limited financial products specifically designed for freelancers severely hinder their capacity to scale and reliably serve international markets. Creating tailored asset financing solutions—such as flexible working-capital loans or income-smoothing products—is essential for freelancers to sustainably grow their incomes.

Users

- **Freelancing can unlock flexible, remote opportunities for women;** Freelance and gig platforms offer valuable flexibility, potentially empowering many African women through remote, digitally mediated work. Yet, without deliberate inclusivity (transparent pay structures, unbiased rating algorithms, gender-responsive onboarding), these platforms risk deepening gender disparities, cementing existing wage gaps, and excluding women.





Global Business Services: Our 2025 Investment thesis



Over the next 5–10 years, Africa's success in Global Business Services depends on shifting from large-scale, transactional BPO toward specialised, AI-augmented KPO work. Rather than sprawling call-center operations, we expect many winning GBS providers to operate like agile agencies—small to mid-sized teams that rapidly adapt to new technologies, build deep niche expertise, and offer premium human-in-the-loop services. Additionally, we hypothesise that the landscape may also benefit from a dual structure where some GBS firms are split operationally, pairing global north based sales teams with African delivery partners. By focusing on this 'agency-like' model and investing in continuous upskilling, we can foster resilient, high-value job creation that keeps pace with global automation.

We think the most investable GBS platforms will exhibit four key strengths:

- **Rapid adaptability:** The ability to quickly pivot and respond to technological advancements and shifts in global client demands.
- **Human-in-the-loop Integration:** Leveraging AI to enhance, rather than replace, human expertise—especially in complex roles
- **Continuous talent development:** Ongoing, targeted investment in upskilling, AI literacy, and structured career growth, ensuring workforce resilience and long-term adaptability.
- **Gender-inclusive pathways:** Intentional design of platforms that prioritise equitable access for women to higher-value, AI-resilient roles, addressing automation-driven displacement risks disproportionately affecting women.

However, significant barriers remain. We think Africa's GBS growth potential hinges on critical and strategic improvements in digital infrastructure—addressing persistent gaps in internet connectivity, power stability, and enterprise-grade technology adoption. Without meaningful investment in these foundations, even the best highly specialised platforms will struggle to scale and compete globally.

Rather than betting on single-platform dominance, the Jobtech Alliance will favor an ecosystem-driven approach. By supporting a network of specialised, agile, adaptive GBS providers, we think Africa can sustainably capture high-value global opportunities and navigate all this uncertainty effectively. This approach will enable the continent's workforce to not only survive but thrive.



Freelance & Digital Gig Work: Our 2025 Investment Thesis



We are standing over the edge of a massive shift in how the world works. In the next decade, we believe freelance work will evolve from atomised, transactional gigs into AI-augmented, team-based service delivery. Africa's talent is uniquely positioned to play a core role in this transformation—young, distributed, digitally native, and rich in cultural and linguistic fluency.

Our investment thesis focuses on emergent platforms that organise freelancers into agile, human-in-the-loop teams—talent clouds, pods, and fractional experts—designed for complex, high-value projects where human oversight, contextual judgment, and adaptability are indispensable.

We are particularly excited by platform models that don't just connect individuals to work, but reshape how work is delivered. These include:

- Microwork platforms that turn Africa's geographic and linguistic diversity into economic advantage—going beyond repetition to power region-specific insights, localisation, and model tuning for the AI era.
- Community-powered models that layer jobtech infra on top of existing digital communities, enabling peer-led skill validation, shared mentorship, and demand aggregation.
- Verticalised freelance platforms focused on high-value, automation-resistant domains

We also see growing potential in platforms that facilitate fractional, on-demand work structures, allowing global clients to spin up niche teams or project-specific pods without the friction of traditional hiring.

The future does not belong to the mass gig platforms of the past. It belongs to this new class of freelance infrastructure—platforms that embed lifelong learning, prioritise adaptability, and equip African workers to thrive in roles that resist automation. In this increasingly borderless economy, we are backing platforms that help freelancers become fluid, future-ready professionals—organised not just for tasks, but for transformation.

5. Inclusivity

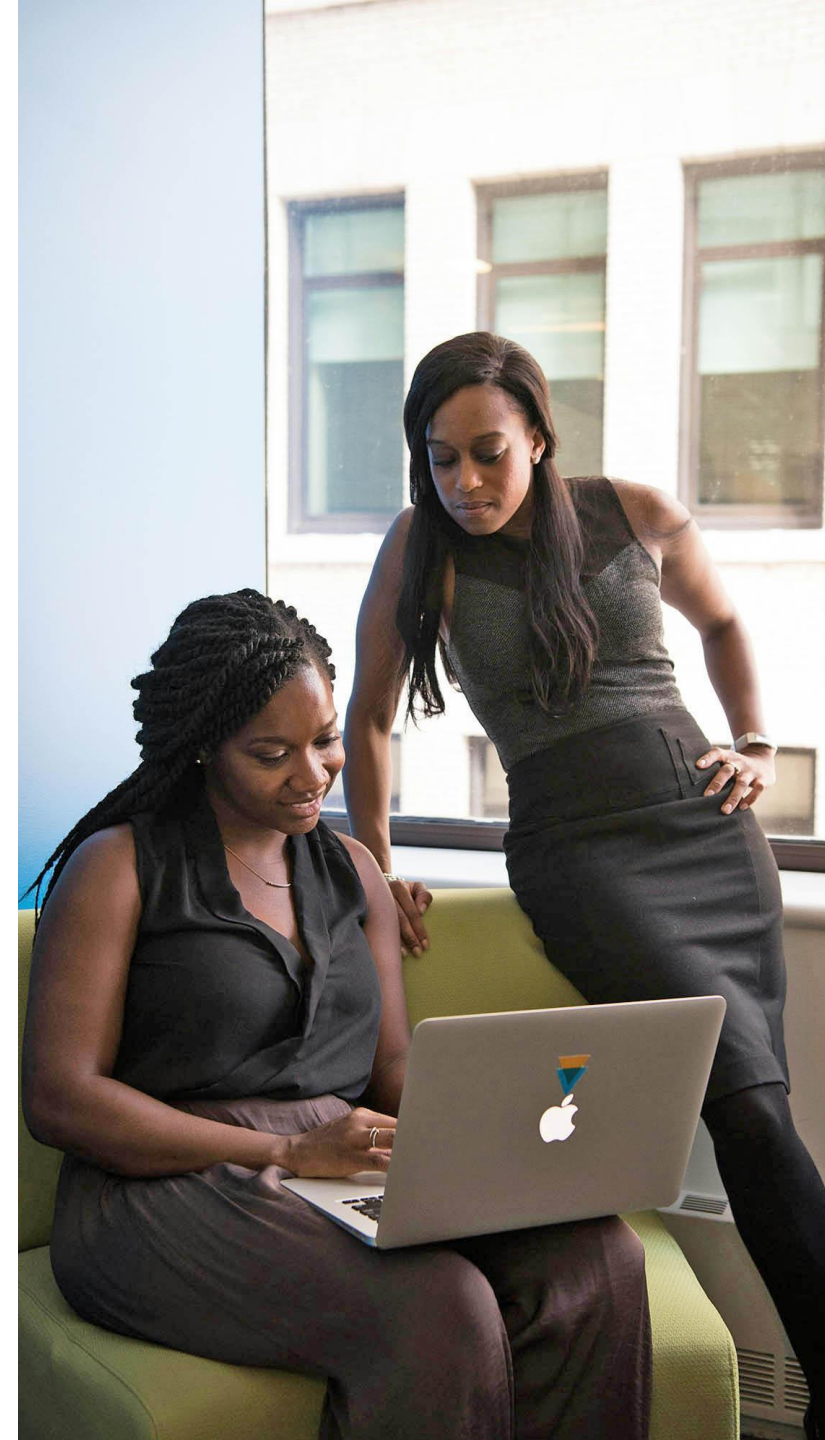


Gender lens across the Digital Work sectors

Digital work platforms have become vital entry points for African women into formal employment, particularly for those facing [societal or educational constraints](#). Our [Gender Scan](#) and recent Jobtech Alliance data indicates that approximately 60% of workers on digital work platforms are women, attracted by flexible roles compatible with family and household responsibilities. While traditionally concentrated in GBS roles like customer support and transcription, women are now increasingly represented across freelancing and microwork sectors.

However, this participation often masks persistent structural inequalities. Women remain overrepresented in repetitive, lower-paid roles highly vulnerable to automation. Bias in platform rating systems, limited access to digital infrastructure, and gender wage gaps continue to restrict progression into higher-value roles. [Research](#) suggests women can earn up to 48% less than men for equivalent freelance tasks on global platforms.

As AI reshapes the digital work landscape, platforms must actively design gender-responsive pathways—offering targeted upskilling, accessible onboarding, and rating systems that mitigate structural bias. Without this, the rise of GenAI threatens not just to bypass African women—but to entrench the very inequalities digital work was meant to challenge.



Sector specific gender callouts



General

Women form the backbone of Africa's digital work sector—but remain over concentrated in roles most threatened by automation. Unless we build deliberate pathways into AI-resilient work, the gender gap will widen, not close. Platforms must move beyond flexibility alone and offer women real ladders into high-value, future-proof roles.

GBS Sector

Customer service and back-office support roles have long provided a structured pathway into formal work for African women, especially those with limited formal education. These jobs offered relative stability, training, and career visibility. However, GenAI is rapidly automating these entry points, placing millions of women at heightened risk of displacement. The growing demand for specialised KPO talent offers new opportunity, but without deliberate support, women may be left behind.

To mitigate this risk, GBS platforms must intentionally design transitions into these higher-value roles. That means building mentorship programs, offering gender-responsive upskilling tailored to women's time constraints, and creating clear, supported career pathways into AI-augmented roles. With the right support, women can move from vulnerable entry-level work to become leaders in Africa's emerging knowledge economy.

Freelance & Digital Gig Work

Freelancing has opened a powerful channel for remote, flexible work for African women—particularly those with strong digital, creative, or language skills. But access remains unequal. Barriers such as biased algorithmic ratings, high data and device costs, and exclusion from digital financial systems disproportionately lock out rural and lower-income women. Moreover, many women are clustered in basic digital tasks most at risk of automation, such as transcription or short-form content work.

The platforms that succeed will be those that close these structural gaps. This means more than flexible hours—it means designing for affordability, inclusivity, and mobility. That includes transparent rating systems, fair pay protections, peer networks, and subsidised connectivity. With these elements in place, freelancing can become not just a side hustle, but a scalable pathway into high-quality, AI-resilient employment for African women.


6. Standout Platforms

Platform Examples – Staff Augmentation



Tana

 tanatech.io

 Kenya



Tana specialises in staff augmentation for growing tech teams, taking on the full lifecycle of recruitment, training, and employer-of-record services. Their model particularly targets recent university graduates with strong technical foundations, offering professional development pathways that include coding mentorship and AI-literacy modules. By focusing on key sectors like fintech, SaaS, and e-commerce, Tana ensures its engineer pool remains relevant and immediately deployable, serving both African and global clients seeking flexible, on-demand talent.



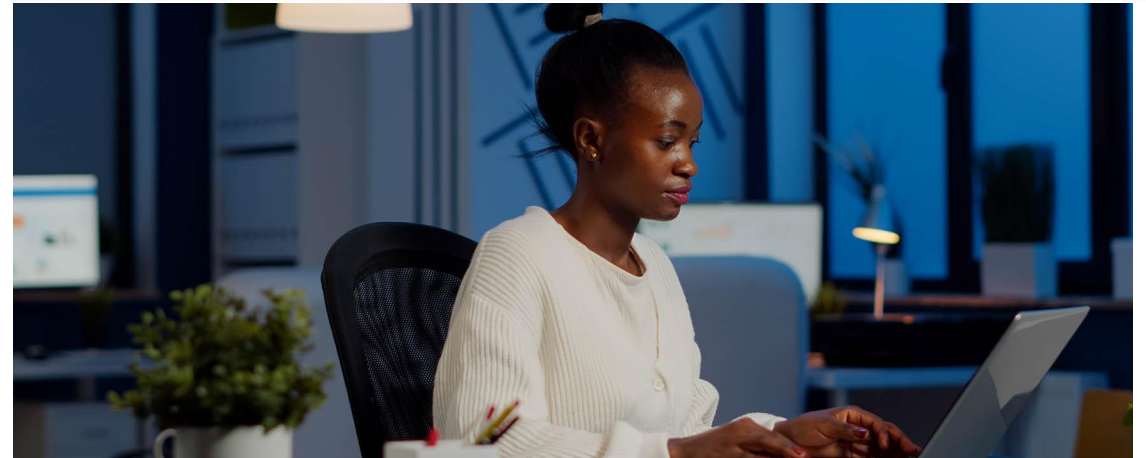
Jada

 jadasquad.com

 Nigeria



Jada provides staff augmentation centered on AI and data roles, running a dedicated bootcamp that equips local Nigerian talent with advanced machine learning and data analytics skills. Unlike generic staffing solutions, Jada aims to place small squads of specialised engineers and data scientists directly into client environments, managing onboarding, professional development, and performance oversight. This hands-on support helps global companies quickly ramp up AI teams while giving African tech professionals exposure to cutting-edge projects




Platform Examples – AI Data Labelling



AfricaAI

 africa.ai

 Kenya



AfricaAI operates physical labeling centers in Nairobi and Nakuru, Kenya, with a strong female workforce tackling data labeling, content moderation, and AI model calibration. By providing on-premise training and supervision, AfricaAI ensures consistent quality and stable working conditions for its annotators. This location-based model fosters community development and offers global clients reliable, high-volume data processing services rooted in local expertise.



Avala

 avala.ai

 San Francisco & Kenya



Avala's distinctive edge lies in vertical AI automation for industries like finance, logistics, and e-commerce. Beyond standard labeling, Avala integrates human-in-the-loop oversight—covering bias detection, ethical reviews, and real-time monitoring—directly into advanced workflow automation. By aligning specialised African teams with automated tooling, Avala helps enterprises scale high-stakes machine learning applications while maintaining robust accountability and quality control.



Platform Examples – Traditional Outsourcing Models



Hugo

 hugoinc.com

 Nigeria

hugo

Hugo has onboarded 2,000+ full-time workers across Nigeria, Senegal, and Kenya to deliver a blend of front & back-office and data-annotation services. Operating a remote-first model, Hugo layers machine-assist tools onto human workflows to handle tasks like trust & safety, content review, and advanced data operations. This approach merges scale with nuanced oversight—an appealing combination for clients seeking cost-efficiency without compromising on accuracy.



Remotelli

 remoteli.com

 UK, Ghana, Nigeria

REMOTELI

Remoteli provides turnkey outsourcing on a monthly subscription basis, enabling companies to quickly spin up remote teams in operations, customer support, and IT. Through its recruitment and workforce-management platform, Remoteli handles everything from onboarding to payroll, allowing businesses to flexibly pivot between roles and skill sets.



Platform Examples – KPO Outsourcing



iTalanta

 italanta.net

 Kenya

 iTalanta

Rather than just placing developers, iTalanta operates like a full-stack dev shop, pairing senior software architects with local engineering teams to deliver end-to-end solutions for European clients. Projects begin with solution design driven by experienced architects, while mid-level African engineers handle coding and testing. This setup not only offers cost-effective, high-quality tech capacity but also provides ongoing mentorship and career development for engineers—a KPO-style approach that integrates specialised expertise into every stage of the software lifecycle.



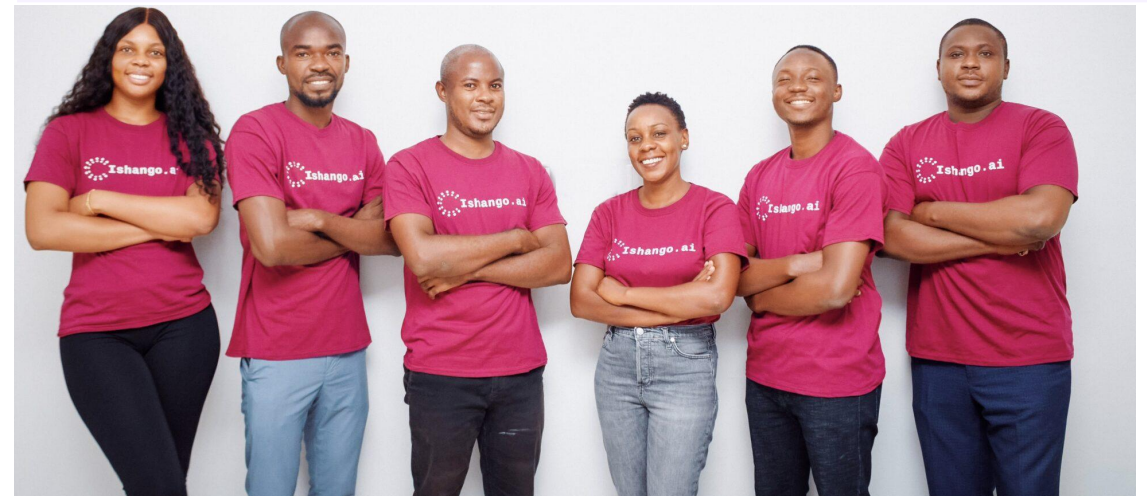
iShango

 ishango.ai

 UK, Pan African

 Ishango.ai

iShango delivers high-value KPO services, from financial modeling to research analytics, acting like an “agency” of domain experts. By combining robust training, thorough quality checks, and African talent specialising in regulated fields such as finance and consulting, iShango addresses advanced outsourcing needs that demand human expertise rather than straightforward automation. Clients benefit from a nimble, specialized partner that consistently invests in skill development to meet evolving market demands.



Platform Examples – Horizontal KPO Outsourcing



EqualReach

 equalreach.io

 Ethiopia, Kenya



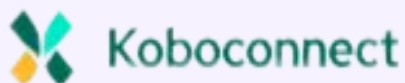
EqualReach is a refugee-focused KPO solution employing a split agency structure: commercial teams in global hubs secure contracts, while refugee talent in Africa delivers on horizontal knowledge-based projects. By combining targeted training, wraparound services, and remote enablement, EqualReach provides stable, skilled opportunities for displaced communities—fulfilling corporate ESG imperatives and addressing client needs for reliable, cost-effective services.



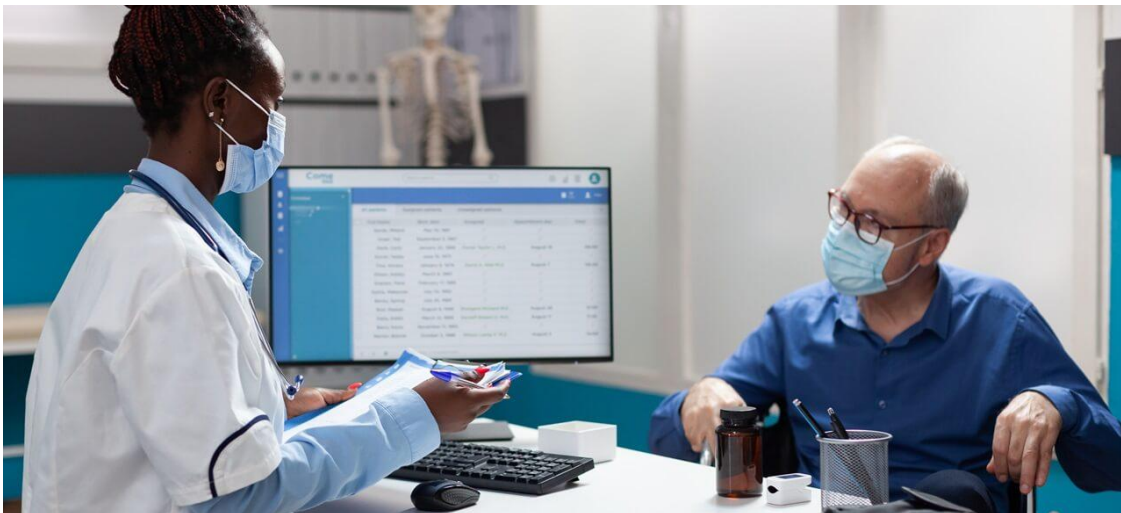
KoboConnect

 koboaccountant.com

 Nigeria



KoboConnect is a horizontal finance KPO offering managed financial services across multiple industries. Its suite of solutions spans bookkeeping, compliance, and virtual CFO support—ensuring clients can offload complex financial operations to a dedicated team. Through ongoing training and stringent quality controls, KoboConnect consistently delivers specialised expertise at scale, allowing businesses to focus on core operations rather than administrative overhead.



Platform Examples – Veritcalised KPO Outsourcing



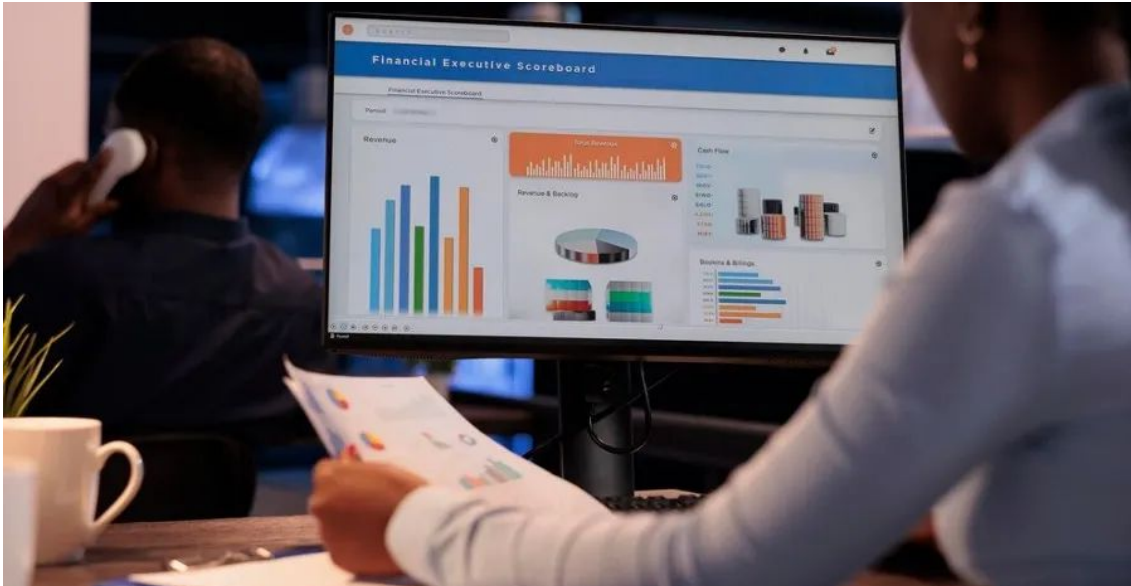
xpedient

 xpedient.co.za

 South Africa



Xpedient provides end-to-end business management for medical practitioners—covering clinical coding, specialised IT support, HR services, and medical billing. Handling over R2 billion annually, Xpedient streamlines administrative burdens so doctors can concentrate on patient care, boosting operational efficiency across clinics and hospitals.



intelics

 intelics.com

 Nigeria



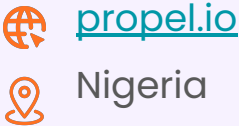
Intelics delivers vertical KPO services in healthcare, offering Hospital Management solutions that enhance patient engagement, optimise health outcomes, and control costs. With 5 million claims processed annually at a 99% accuracy rate and 50 million medical records handled, Intelics emphasises precision and efficiency for providers needing scalable, tech-driven back-office support.



Platform Examples – Managed Freelance Models




Propel



propel.io

Nigeria



Propel organises Africa’s thriving community-based talent pools—like coding collectives and design groups—and aggregates global demand at scale. Layering job matching, skill verification, and finance tools, Propel turns grassroots networks (e.g., She Code Africa) into structured, high-performing freelance hubs, unlocking premium opportunities for local talent and providing businesses with highly curated teams.



Rafiki

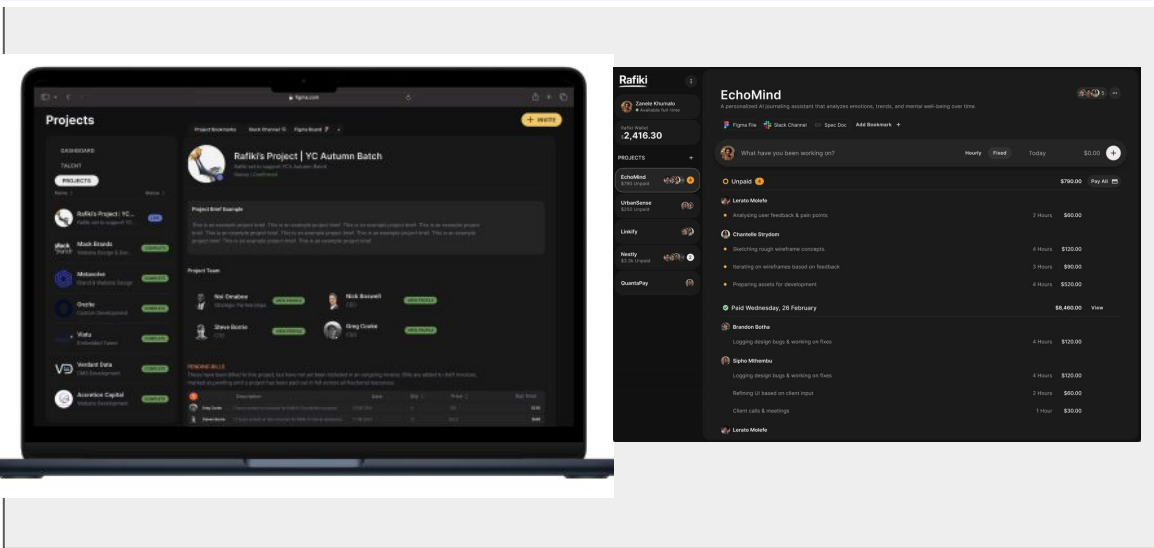


rafiki.works

UK, South Africa



Rafiki is a micro-agency platform that groups African freelancers into on-demand “pods” of specialised talent for high-value, global projects. Instead of competing in fragmented gig markets, Rafiki’s model positions freelancers as team-based consultants, winning premium contracts in software development, content creation, and AI moderation. This collaborative approach allows rapid assembly of targeted skill sets, offering clients agile, high-impact solutions.



Platform Examples – Freelance Marketplaces



MeaningfulGigs

 meaningfulgigs.com

 Pan African



MeaningfulGigs curates a network of African designers, matching them with enterprise clients seeking premium creative talent in UX/UI, branding, and illustration. By investing in skill development and offering managed project workflows, MeaningfulGigs ensures consistent quality and a frictionless experience for both designers and corporate partners—ultimately showcasing how specialised freelance can deliver high-impact results on a global stage.



YouDesign

 youdesign.africa

 Nigeria



YouDesign.Africa is a freelance marketplace connecting African creative professionals with businesses worldwide, spanning fields like graphic design, web development, and branding. An emphasis on quality, trust, and innovation propels African freelancers to excel on a global stage—ultimately demonstrating that specialised freelance services can drive transformative impact across diverse industries.



Platform Examples – Microwork Platforms



Rwazi

 rwazi.com

 Nigeria, Pan Africa

rwazi

Rwazi taps into Africa's distributed network of local data collectors, gathering hyper-local market insights for brands across retail audits, consumer behavior studies, and more. By turning smartphone users into "field researchers," Rwazi supplies real-time, high-fidelity data that helps global companies make better-informed decisions grounded in authentic on-the-ground perspectives.



Lengo

 lengo.ai

 Senegal

lengo

Lengo leverages a distributed microworkforce for data labeling, moderation, and real-time data capture, focusing on retail AI and e-commerce solutions. Anchored in ethical AI development and fair compensation, Lengo combines deep human insights with scalable crowdsourcing, enabling both quality outputs for clients and sustainable livelihoods for gig workers in underserved regions.

