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# Labour Mobility Sector Scan

**How jobtech can help move  
African talent across borders to  
meet global demand**

# Irregular migration has become the norm for many Africans. It doesn't need to be.



## Irregular migration

Movement of persons that takes place outside the laws, regulations, or international agreements governing the entry into or exit from the State of origin, transit or destination.

## Regular migration

Migration that occurs in compliance with the laws of the country of origin, transit and destination.

The New York Times

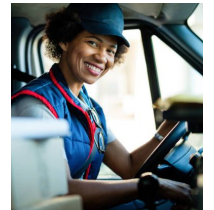
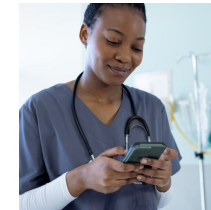
AFRICA | Why Maids Keep  
Dying in Saudi Arabia



BBC

Police break up ring trafficking Kenyans  
to fight for Russia in Ukraine

27 September 2025  
Wycliffe Muli  
Twitter



Young Africans, constrained by a lack of economic opportunities at home, are seeking opportunities both [elsewhere on the continent](#) and globally.

Many young workers default to irregular migration due to limited awareness of legal pathways and a fragmented recruitment industry that often operates informally.

We believe that jobtech platforms offer a unique opportunity to shift this norm by boosting the utilisation, transparency, and affordability of regularised labour mobility pathways.

# What is in this scan

In this scan, we explore what this new era of labour mobility means for Africans and the jobtech sector. This is the first comprehensive review examining how jobtech platforms can reduce frictions and bridge gaps by:

- **Mapping the challenges and opportunities**  
Where is the demand for African talent rising? What are the barriers to regular migration that jobtech can solve for?
- **Identifying working solutions**  
How can platforms and the private sector replace exploitation with efficiency?
- **Charting the future**  
How can funders and founders, with the help of policymakers, build ethical, financed pathways for the next generation of workers?

This scan draws on Jobtech Alliance's multi-year work on labour mobility, including direct engagement with 100+ platforms, investor and operator interviews, policy analysis, and insights from our **Crossborder Jobs Startup Competition**. This gives us a unique and grounded, practitioner-led view of how the market is evolving.

## Contents

[Why labour mobility? Why jobtech? Why now?](#)

[Labour mobility corridors and pathways](#)

[Platform taxonomy and showcase](#)

[Sector analysis and stakeholder mapping](#)

[Investment thesis](#)

# A pause for concern

**We do recognise that promoting African labour mobility to global markets, rather than only within Africa, is incredibly complex:**


- It could be seen as a form of neo-colonial extraction of resources (talent) from Africa.
- It is an extremely sensitive topic in the current geopolitical context and as such, it can be very polarising, shaped as much by domestic politics and public sentiment as by economic considerations.

This scan is not designed to serve as an advocacy piece, presenting proof points unequivocally for labour mobility from Africa. It recognises that migration is happening, and the form that it is currently taking is not particularly beneficial for workers and (sometimes) for host countries either.

That is why we present a more pragmatic analysis of how jobtech platforms can improve the quality, dignity and quantity of regular migration, and how platforms can operate within the existing macro constraints to improve outcomes for young Africans.







**Why labour mobility?**  
**Why jobtech?**  
**Why now?**

# Jobs in high-income countries are the most powerful anti-poverty intervention



**800 million**  
people in  
extreme poverty

of which 73%  
live in Africa



**6–15x**  
wage gains  
to be unlocked

when workers  
from developing  
countries migrate to  
high-income nations



**\$1.4 trillion**  
In income gains

if young people  
from low-income  
countries  
could migrate to  
high-income countries  
more easily



**These gains dwarf the  
impacts of other  
development  
Interventions**

Direct cash transfers and  
graduation programs (cash +  
assets + training) are  
established interventions, but  
their impacts are small in  
absolute terms, and they decay  
over time.

# Migration provides enormous spillover benefits



**+2%**  
**GDP increase**  
**in host countries**

for every 1% increase in migrant worker who joins the local labour market, driven mainly by higher labour



**\$656 billion**  
**in remittances**  
**\$71b (2000) to**  
**\$656b (2023).**

This is a **360% larger** financial flow to low-income countries than developed assistance



**Brain gain,**  
**not brain drain**

Opportunities abroad for skilled workers from low-income countries increase workers' net supply at home.  
For every nurse who left the Philippines for the USA, **9 additional nurses** were trained and stayed in the Philippines



**For unskilled workers and youth who lack access to education and employment, education and vocational migration abroad are even more transformative given limited opportunities at home.**

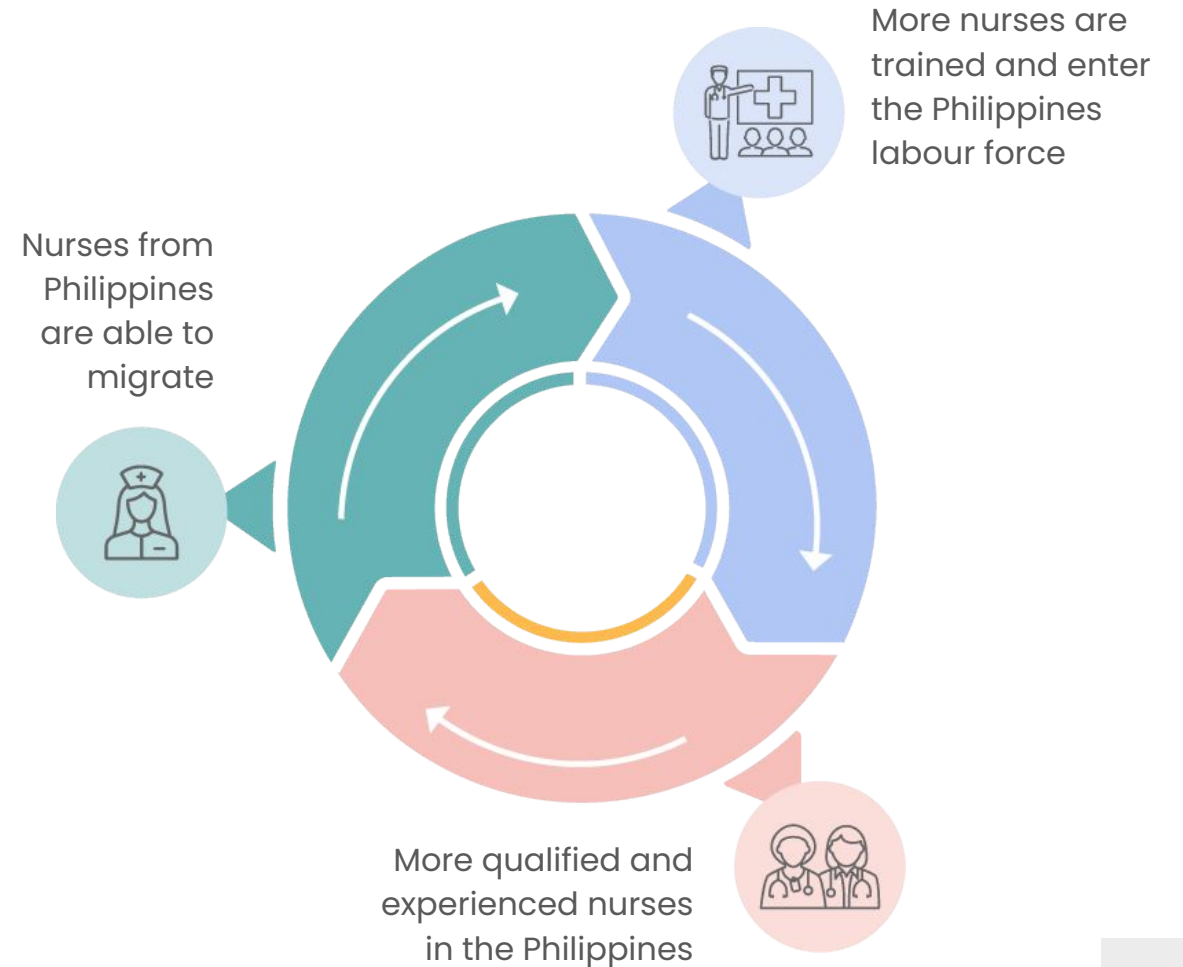
# The Philippines proved that labour migration can be a net positive for all sides

In the early 2000s, the US opened up visas for nurses from abroad. Many feared this would lead to brain drain in countries like the Philippines. Instead, the opposite happened.

The surge in global demand triggered a rapid expansion of nursing education within the Philippines. Students shifted their career paths, private institutions opened new nursing programs, and enrolment boomed. The migration opportunity raised the status and value of nursing, making it an aspirational career for hundreds of thousands.

**For every nurse who left the Philippines to work abroad, 9 more obtained their licences, a massive net increase in the country's health workforce. Many of those trained nurses remained and served domestically, improving local healthcare capacity.**

Migration didn't drain the system, it grew it. It created jobs, strengthened institutions, and brought in billions in remittances that fuelled household spending, healthcare, and education.





# African talent is ready to work, but where?

**12 million Africans**

joining the labour market annually



**Only 3 million jobs**

**created** in Africa's formal economy annually



**No trusted  
corridors to  
connect to the  
massive, but  
underrepresented  
supply of African  
workers**



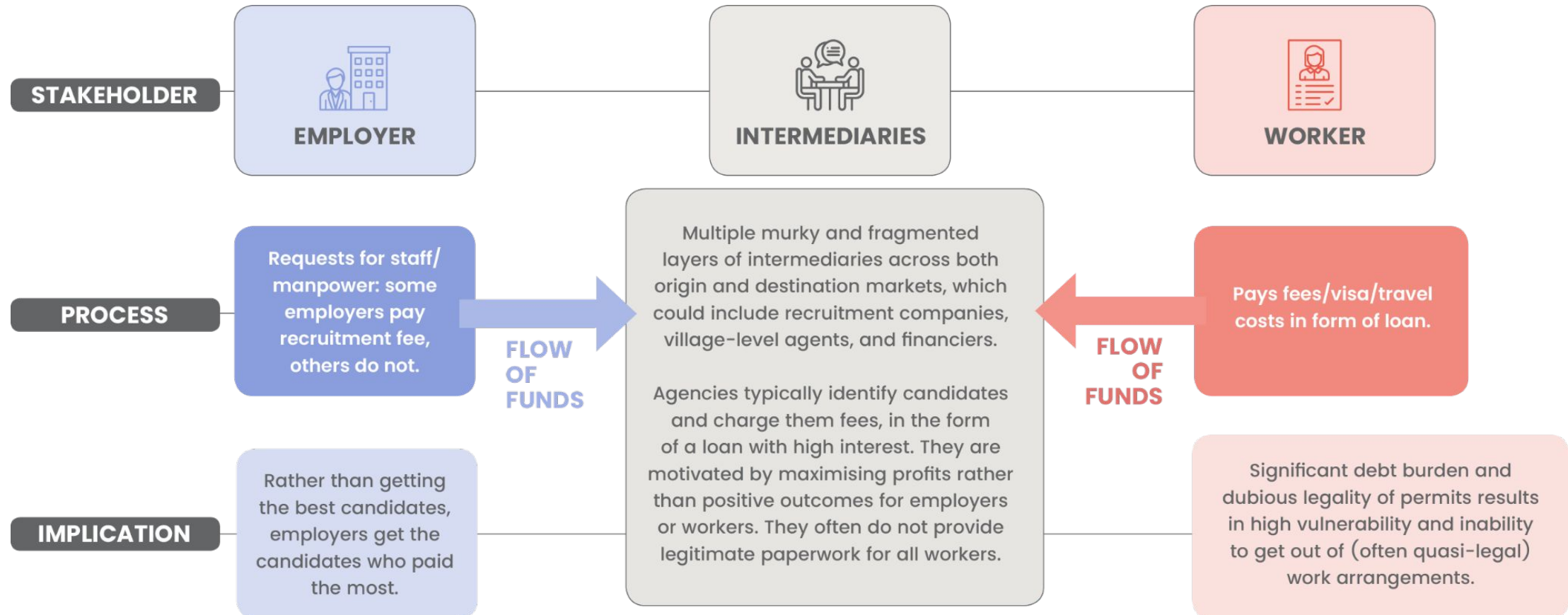
**Over 95 million workers**

**needed** in Europe by 2050

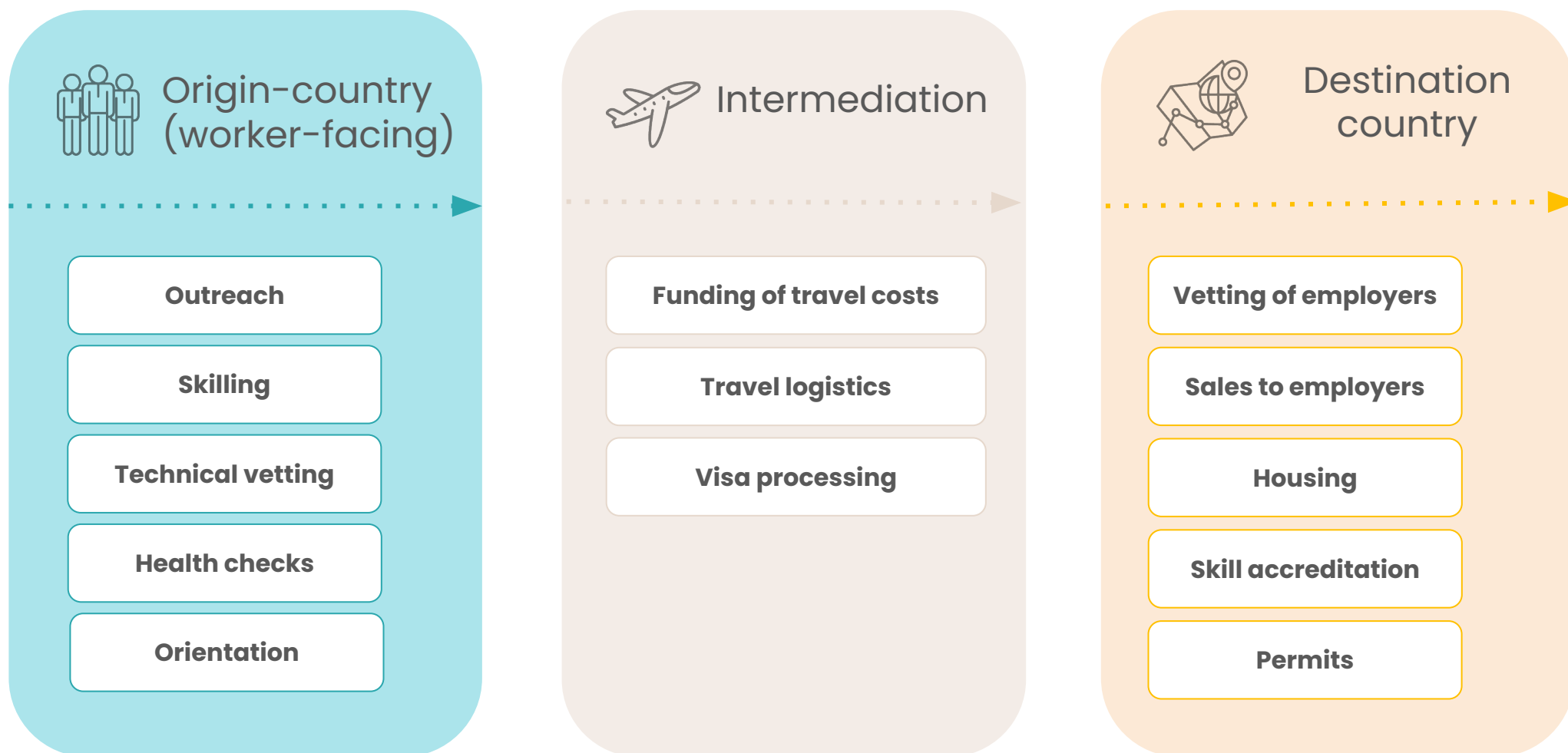
# The labour migration story for Africans is often defined by exploitation

With a system that rewards job placement rather than worker or employer outcomes, risks are pushed onto workers who often get stuck in highly vulnerable work conditions. Two themes underlie the typical labour mobility experience for most young Africans:

- Would-be migrants typically pay intermediaries to migrate (despite this being illegal in most countries), taking out large loans with significant interest.
- There is a lack of transparency in the process and weak adherence to visa requirements, meaning many migrants are left in legal limbo after arrival.



# In order to overcome this broken system, a range of functions need to be solved for



# The implications of this broken system



**Sarah, 28, Nairobi**

Sara is a skilled nurse who is medically qualified to fill a critical shortage in a German hospital. Yet, she is unable to migrate because she cannot access affordable language training to pass the B1 German language exam.



**Tesfayesus, 32, Addis**

Tesfayesus is a driver from Addis Ababa seeking work in the Gulf to support his family. He falls victim to predatory agents, paying exorbitant recruitment fees that trap him in debt before he earns his first paycheck, only to find the wages are lower than promised.

# How can jobtech platforms solve this?

**Labour migration from Africa is not failing because of a lack of demand or willing workers. It is failing because the systems that connect them are fragmented, opaque, and misaligned, valuing access to jobs over positive outcomes for workers**

Today's migration ecosystem is defined by disconnected actors across origin and destination countries, manual processes, and intermediaries that capture value while pushing risk onto workers. These systems cannot scale responsibly, transparently, or reliably, and African migrants disproportionately bear the cost of that failure. **Jobtech platforms can solve for many of these failures.**

## Why the status quo is broken

- Fragmented processes across recruitment, training, visas, financing, travel, and onboarding
- High information asymmetry between workers, employers, and intermediaries
- Bargaining power asymmetry borne disproportionately by workers through fees, delays, and uncertainty
- Compliance complexity that discourages ethical employers and favors informal channels

## What jobtech platforms can do

- Provide transparency in fragmented migration systems, building coherent, end-to-end pathways
- Bundle critical services across the worker lifecycle rather than pushing them onto individuals
- Replace informal trust with verifiable contracts, data, and compliance infrastructure
- Align incentives between workers, employers, regulators, and financiers
- Operate at corridor level, where rules, skills, and demand are specific and solvable

## What changes if platforms get this right

- Migration shifts from informal and exploitative to formal and repeatable
- One-off placements become durable labour corridors
- Employers gain reliable, compliant access to talent
- Workers gain safer pathways, better outcomes, and real economic mobility



# What role can jobtech play?



# Why now?

The opportunity is to **align global labour shortages with Africa's youth potential** through structured, ethical systems and platforms, harnessing the:



## Policy momentum and need for clearer pathways

Countries like Kenya, Uganda, Tanzania, Nigeria and Ghana are prioritising labour migration to boost remittances and reduce domestic unemployment. Meanwhile, on the demand side, there are Germany's Skilled Immigration Act, EU talent partnerships and Canada's expanded intake. Gulf region countries are formalising recruitment, signing bilateral deals with African countries.



## Market demand

Private sector employers in aging economies are increasingly prioritising supply chain ethics in recruitment, willing to pay for verified, compliant talent pipelines and avoid regulatory and reputational risks.



## Innovation

Tech-first services can now automate key steps in the migration journey such as recruitment, skilling, documentation, and compliance, and provide embedded support such as financial products to cover pre-departure and post-arrival expenses.



## Capital readiness

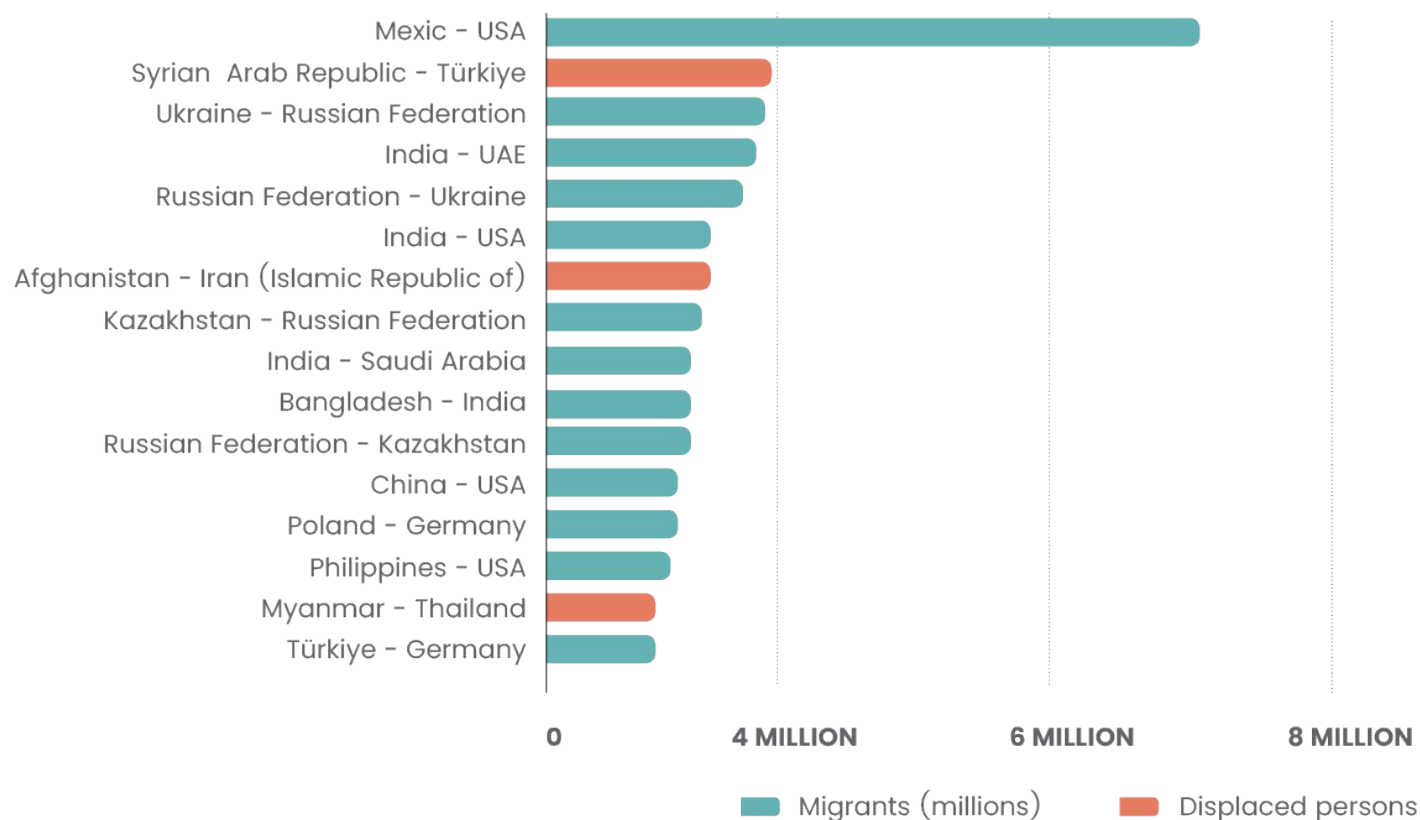
A new generation of platforms have proven recurring revenue mechanics, making it possible to build beyond placement fees.



# Labour mobility corridors and pathways

# Most African corridors are underdeveloped

Top international country-to-country migration corridors, 2024



**African nations remain highly underrepresented, because corridors are underdeveloped, weak and fragmented,** with only one pairing (Algeria-France) entering into the top 20 corridors globally.

Africans account for only **6.6% of migrants in the Middle East and 8.2% in Europe,** highlighting the untapped potential of (young) African talent in global markets.


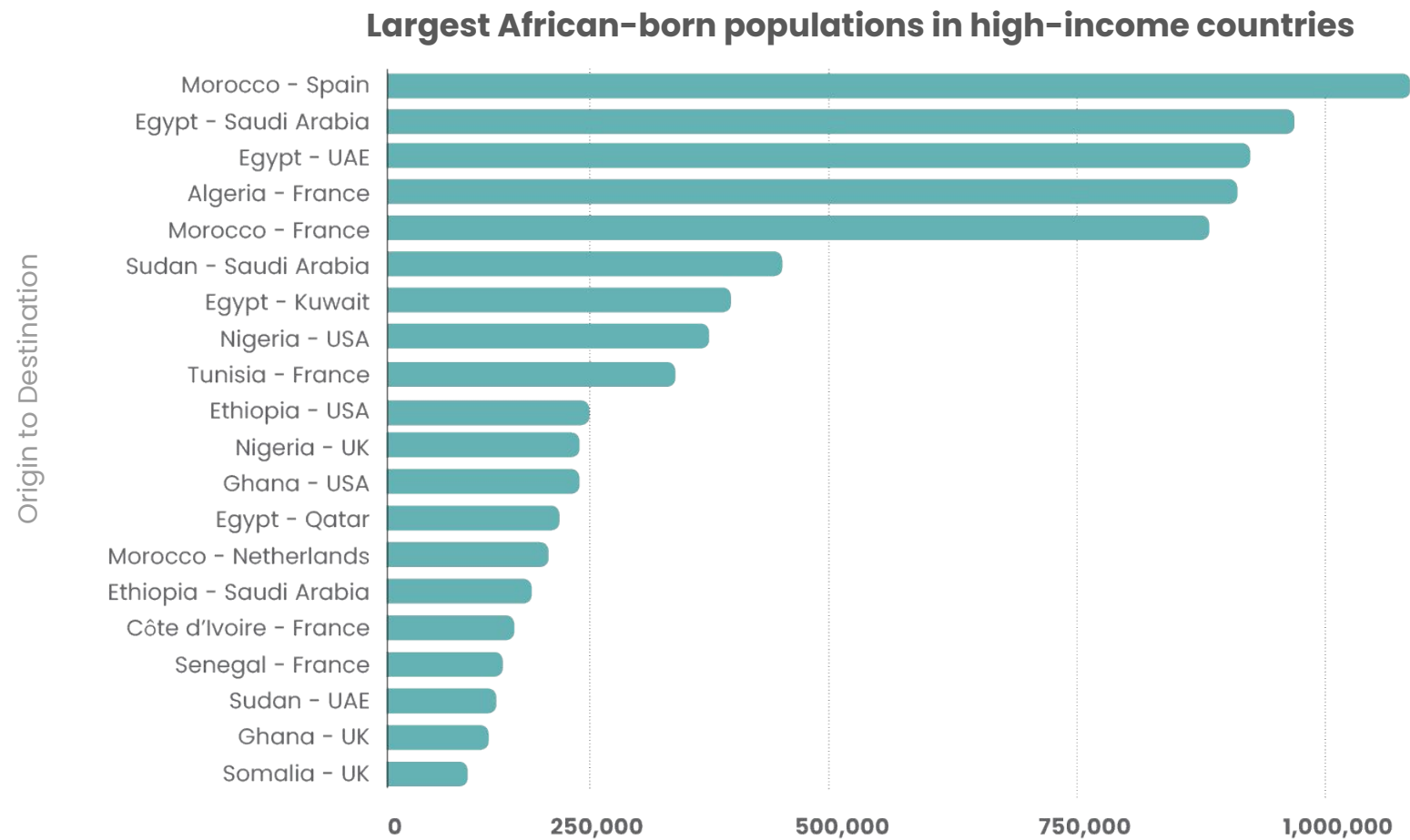
Source: UN DESA, 2021a; UNHCR, 2023a.

Notes: The corridors represent the number of international migrants (million) born in the first-mentioned country and residing in the second. Corridors represent an accumulation of migratory movements over time and provide a snapshot of how migration patterns have evolved into significant foreign-born populations in specific countries.

These corridors comprising mainly displaced persons are coloured orange. Revisions have been made based on large-scale displacement from Ukraine to neighbouring countries (as at end October 2023).



# The potential for growth is there



**North African** origin corridors dominate the most popular migration pairings with high-income countries.

Given lower average incomes and comparable populations, there is a significant opportunity to broaden access to migration pathways for countries in **sub-Saharan Africa**.

Source: IOM World Migration Report 2024



# Emerging\* focus corridors for jobtech platforms

SECTOR	DEMAND-LED OPPORTUNITIES	THE JOBTECH SOLUTION	2026 CORRIDOR TRENDS
 <b>HEALTH &amp; CARE</b> (UK, Germany, EU)	<b>High value and urgency</b>  Aging populations have created a deficit of ~2m+ workers. Clear visa routes exist (e.g., Germany's "Chancenkarte").	Credentialing, licencing and language preparation integrated with placement.	Germany is investing heavily in long-term training pipelines, while the UK is pivoting on visa caps, making Germany the more stable growth corridor in 2026.
 <b>SEASONAL AGRICULTURE</b> (Southern Europe, UK)	<b>High volume and recurring</b>  Strict harvest windows create massive, immediate quotas (e.g., Italy, Spain) with low skill barriers.	Marketplaces to aggregate demand, paired with travel finance and logistics coordination.	The EU is pushing for talent partnerships that favour circular migration (workers return home), aligning perfectly with seasonal cycles.
 <b>SKILLED TRADES</b> (Germany, Austria)	<b>Acute shortage</b>  Welders, electricians, and fitters threatens EU industrial output. High job security for workers.	Video-based skills verification and automated apprenticeship matching to bridge the trust gap for vocational talent.	Unlike the US (degree-focused), Europe values vocational training.
 <b>CONSTRUCTION &amp; HOSPITALITY</b> (GCC)	<b>Massive demand and absorption</b>  Vision 2030 projects require armies of service staff. Fast hiring cycles with minimal language barriers.	Tech-enabled monitoring of contracts, payroll, and fees to prevent exploitation.	Germany is a language play (high barrier, high retention), while GCC is a compliance play" (low barrier, high turnover).

\*Emerging focus corridors are those where demand, policy openness, and platform readiness intersect

# Labour mobility pathways

Pathways & Sub Types	Employer sponsorship			Seasonal work	Study-to-work	Third-party sponsorship		Irregular migration
	Direct recruitment	Skill and place	Managed Staffing			G2G workforce programs	Humanitarian-to-work pathways	
Scope for jobtech platforms	The destination employer is sponsor + EOR. Platforms act as matchmakers, mobilising workers on employer-paid success fees	Employer-sponsored visa; platforms bundle training + placement, funded by employers and sometimes worker co-pays	An intermediary platform or agency serves as EOR, placing workers on contracts and earning margin on billable hours while carrying payroll/liability	Time bound and often quota driven visas; platforms aggregate demand + manage logistics, revenue from employers/program	Study visas converted to work on successful completion; platforms monetise via tuition + matching models	Bilateral state quotas; platforms provide rails (credentialing, visa, payroll) sold B2B into long-cycle government programs	Humanitarian visas; platforms support verification, training, and placement, typically donor-funded.	Off the books routes. Huge scale but messy: worker paid fees, high risk, informal brokers. Not investable, but real.
Typical Sectors	Skilled, white-collar (nurses, teachers, IT workers)	Language placement	Facility services	Agriculture (harvesting)	University study	Health workforce MOUs	Refugee employment pilots	Informal brokered construction, etc.
	Semi-skilled (hospitality, construction)	Trade upskilling and placement	On-hire care outsourcing	Tourism and hospitality (seasonal)	Any licence bridging (nursing, trades)	Teacher exchange programs		Unregulated platforms
	Domestic work	Credentialing / licensing prep	Light-skilled staffing	Other seasonal staffing	Apprenticeships	Skilled trade quotas		



# Platform taxonomy and showcase

# A labour mobility, jobtech platform taxonomy

Platforms typically specialise in a specific pathway and geography, bundling multiple services to ensure successful worker outcomes. They differ primarily in whether they aggregate demand, manage workers, or both.



Employer sponsorship

Third-party sponsorship

Direct recruitment	Skill and place	Managed staffing	Study-to-work	Seasonal work	G2G workforce programs	Humanitarian-to-work pathways	Irregular migration
Job boards and matching	Training and placement	Employer of Record (EOR)	Tuition-led skilling	Recruitment	B2G rails	Employment enablement	Unregulated boards
Platforms that connect workers directly to employers, typically paid per hire or listing	Platforms that deliver training (e.g. language /licensing) tied to guaranteed job placement	Platforms that become the legal employer of record, handling payroll, compliance, and liability	Education first platforms funded by student tuition, converting into visas with job placement opportunities	Licensed entities that aggregate demand for seasonal visas and manage worker deployment	Platforms providing governments with migration infrastructure like credentialing, payroll, or case management	Platforms that train and place refugees or migrants, funded by NGOs or donors	Informal platforms or social media groups where jobs are posted outside legal oversight
Managed placement	Upskilling and matching	Managed staffing	Conversion	Managed services	Placement	Resettlement wraparound services	Broker chains
Digitally enabled platforms that manage recruitment, mobilisation while remaining accountable for worker outcomes	Training platforms co-financed by employers in return for committed hires	Staffing platforms that second workers to employers, earning margins on contracts	Platforms focused on converting study visas into work permits via training and compliance	Platforms bundling seasonal recruitment with accommodation, transport, and pastoral care	Platforms contracted to place workers within quotas or government-led programs	Platforms that coordinate legal aid, psychosocial support, housing, and integration services alongside job placement	Informal networks of agents who charge workers for job access outside regulated systems

## Unbundled services

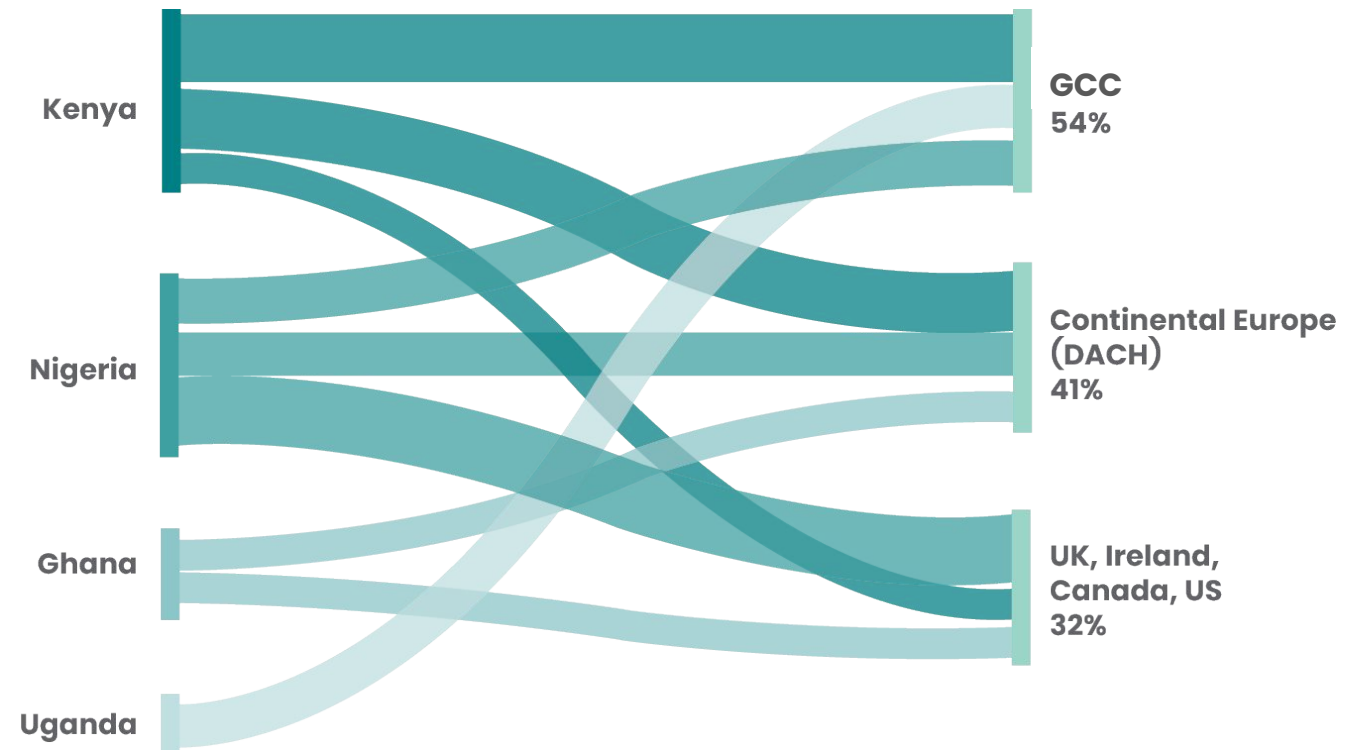
Financial			Migration	
Remittances	Insurance	Loans and income-sharing	Pre-departure support	Settlement support
Platforms providing low-cost, fast transfer tools tailored for migrants sending money home	Platforms providing cover for deportation, contract loss, illness, or termination	Platforms providing financing for upfront migration costs, repaid from contracts	Platforms that help migrants through administrative processes, including: <ul style="list-style-type: none"> <li>• Skilling or re-skilling for accreditation (e.g. , targeted language training, credentialing and verification)</li> <li>• Verified information on contracts, rights, wages, and recruiters</li> <li>• Visa guidance and/or application management</li> </ul>	Platforms that help migrants travel and settle abroad, including: <ul style="list-style-type: none"> <li>• End-to-end support for travel</li> <li>• Housing matching</li> <li>• Cultural integration</li> </ul>



# Mapping the sector as it stands: lessons from the Cross-Border Jobs Competition

The Jobtech Alliance, in collaboration with [LaMP](#), [CFYE](#), [IOM](#), and [Tech Safari](#) ran a [Cross-Border Jobs Startup Competition](#) in November 2025. With over 100 eligible applicants, we can see the main corridors that platforms are targeting:

- **The GCC corridor (54% of applications)** oriented primarily towards fast deployment. Whether it was Kenya to the UAE or Uganda to Qatar, blue-collar workers made up the bulk of the movement. It is the corridor seen as the most risky, given exploitation issues and well-documented vulnerabilities. Platforms need to navigate worker safety, employer behaviour, contract transparency, and how quickly people could actually be deployed.
- **Continental Europe, particularly the Germany, Austria, and Switzerland (DACH) corridor (41% of applications)** has nursing as the dominant segment. These platforms live and breathe licensing rules, language exams, and slow but highly regulated processes.
- **The UK, Ireland, Canada, and US corridor (32% of applications)** has models mostly built around skilling, exam preparation, and study-to-work routes. While the rules governing this corridor are clearer, the process is still long, expensive, and demanding for workers.





# African labour mobility platform ecosystem



# Direct recruitment (managed placement)

Jobtech Alliance portfolio company

**AEDILO**

## AEDILO

<https://www.aedilo.com> East Africa → GCC

**AEDILO** is a venture-backed, full-stack recruitment platform that controls the hiring process end-to-end, directly connecting employers with digitally verified and skill-tested Workers.

By working exclusively with direct employers, **AEDILO** eliminates middlemen and is able to safeguard job integrity – ensuring salaries are paid on time and employment terms match what was originally agreed. On the supply side, **AEDILO** sources workers directly through on-the-ground campaigns, independently onboarding candidates and assessing skills.

**AEDILO** maintains full operational control over the migration journey, from medical checks and documentation to visa processing and flight bookings.

**As a result, AEDILO is one of the few platforms able to fully eliminate commissions paid by workers.**

**STARLINE  
STEPPER**

## STARLINE STEPPER

<https://www.starlinestepper.com/>  
Kenya, Uganda → EU and GCC

**Starline Stepper** is a hybrid recruitment platform that connects verified African candidates to ethical overseas employers through a transparent, end-to-end placement system. The platform combines on-ground vetting and trade testing with digital matching, financing, and compliance tools, ensuring candidates are prepared and documentation is managed efficiently.

**Starline** reduces dependency on informal channels by offering a structured pathway that prioritizes verification, transparency, and worker protection. Unlike traditional recruitment models that can be costly and fragmented, **Starline** integrates assessment, matching, and process management into one streamlined workflow – providing employers with reliable talent and workers with a clearer, safer route into global job markets.

# Direct recruitment (job boards and matching)



## JOBDAWG

<https://jobdawg.com/> Africa → Europe

**Jobdawg** is a cross-border job discovery platform that helps workers identify overseas employers willing to sponsor visas. The platform allows candidates to filter roles by destination, skills, and visa openness, giving them visibility into real international opportunities and reducing reliance on informal brokers or opaque WhatsApp networks.

Rather than managing placement or compliance directly, **Jobdawg** focuses on transparency and access. By surfacing verified employers and live roles across multiple geographies, it helps workers better understand their market value and options, while leaving sponsorship, visas, and onboarding to employers and recruiters. The model functions as a lightweight entry point into global labour markets, particularly for first-time migrants.



## SILVER RAYHR

<https://silverrayhr.com/> Africa → Gulf & Europe

**Silver RayHR** is a Nairobi-based recruitment and staffing agency that connects Kenyan professionals with credible employers both locally and internationally. The firm focuses on ethical, transparent hiring practices and does not charge fees to candidates, aiming to reduce the hidden costs and exploitative practices that often burden jobseekers pursuing work abroad. [OBJ]

At its core, **Silver RayHR** sources job opportunities, manages candidate selection, and coordinates placement with employers in regions such as the Middle East and Europe. Roles range across technical trades, healthcare, transport, hospitality, administration, and professional services, and the company supports candidates through documentation and pre-departure preparation to improve the likelihood of successful deployment.



## WORKINGER

<https://workinger.eu/> Africa → Germany

**Workinger** is a workforce mobility platform helping German hospitals recruit fully prepared international nurses through a structured, end-to-end pathway. The platform integrates language learning, credential recognition, matching, and relocation into a single system, reducing the long and fragmented processes employers usually face.

**Workinger's** model focuses on readiness and retention, ensuring nurses meet German standards before arrival. In contrast to traditional agencies that rely on manual steps and limited post-placement support, **Workinger** offers a streamlined, transparent, and scalable pathway that improves outcomes for both employers and nurses.

## Jobtech Alliance portfolio company



## VELOCITY

<https://www.wise-scale.com/en-KE> Kenya → Germany

**Velocity** addresses the critical language gap that limits African nurses from accessing regulated healthcare roles in Europe. Through its AI-powered German language platform, nurses can learn flexibly online at a fraction of traditional costs, progressing toward internationally recognised certifications.

The platform tracks learner progress, manages placement readiness, and even has language training financing solutions such as through Income Share Agreements (ISAs) with partners like Chancen International. Most importantly, **Velocity's** platform then matches learners completing learning to the desired standard to roles through accredited German partners such as Deraja, Terratalent, and TERN.

# Skill and place



## Cross-border jobs competition winner



### PROPELA

<https://www.propela.health/> Africa → Ireland & UK

**Propela Health** is a nurse mobility platform helping qualified but underemployed South African nurses access ethical, structured pathways into high-income healthcare systems facing chronic shortages. The platform focuses on readiness rather than brokerage, addressing language, credentialing, and orientation gaps that prevent capable nurses from successfully migrating and staying in role.

**Propela** provides exam-focused English training, pathway guidance, and cohort-based support, connecting nurses to ethical recruiters and employers once they are fully prepared. Employers benefit from pre-vetted, retention-ready talent rather than transactional placements, improving fit and reducing attrition in critical healthcare roles.

M I L J O N

### MILJON

<https://miljon.io/> Africa (Ethiopia) → EU (Sweden), GCC

**Miljon.io** creates structured mobility pathways that move African professionals into EU and Gulf jobs by combining skills assessment, targeted upskilling, and coordinated placement. The platform identifies candidates for verified shortage roles and prepares them through CPD-certified training aligned with European standards. With the backing of a large Scandinavian staffing group, **Miljon** manages documentation, employer matching, and fast-track work permits.

By unifying readiness, compliance, and placement, **Miljon** shortens recruitment cycles and reduces drop-off for both employers and candidates. This makes international hiring more predictable and gives workers a clear, supported route into regulated roles across the Nordics, wider Europe, and the Gulf.



# Managed staffing: spotlight on **Tern Group** as a global powerhouse

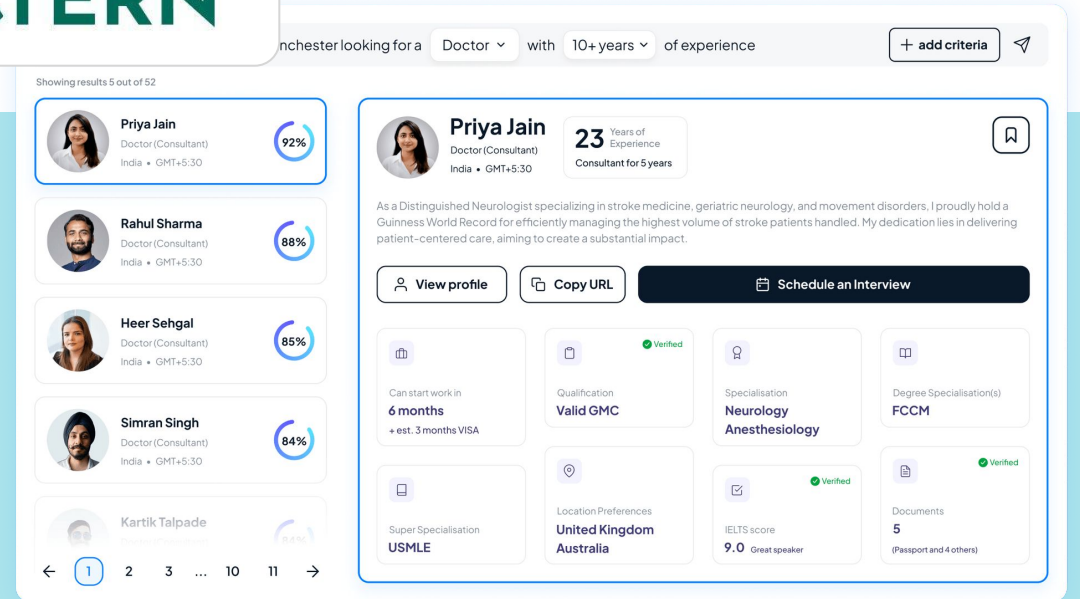


## COMPANY SNAPSHOT

- **Cross-border healthcare worker placements**, moving into direct healthcare provisioning through new acquisitions.
- Model combines **tech and full-stack services** (language, credentialing, relocation), alongside deep demand-side operations.
- **Destination markets:** Germany, UK, GCC, Japan.
- **Sourcing markets:** India, Southeast Asia, North Africa.

## KEY ACHIEVEMENTS

- **7,000** global placements in 2025, including **2,000 nurses to Germany**.
- **~100** employees.
- **~\$20M** venture capital raised plus additional debt for acquisitions.
- Dual presence in India and Europe, aligning talent supply and demand.
- Vertically integrating deeper into demand-side with acquisition of healthcare services firms in Germany.



## INNOVATION APPROACH

- **Verticalising downstream** through M&A into healthcare services in order to directly control talent placement while profiting much more significantly than from recruitment business model.
- **Tech-first platform** to automate most of worker sourcing, screening, and interview scheduling
- **Integrated support:** including language training, visa assistance, banking, housing, onboarding.
- **High worker standards:** zero placement fees for candidates, ethical recruitment compliance.
- **Key Partnerships:** NSDC International (India), TNAI (Germany nurse training program).

# Study-to-Work

## LaborHack™

### LaborHack

<https://www.laborhack.com/> Kenya, Uganda → EU, GCC

**LaborHack** prepares skilled African workers for Canada through two pathways, with a primary focus on the study-to-work route. Through partnerships with Canadian technical colleges, candidates enrol in 2-year programs that lead to a work permit and a clear path to permanent residency.

Alongside this, **LaborHack** runs a direct employment pathway where verified technicians match with Canadian employers and access relocation loans for visas, travel, and documentation. By digitizing credentials and standardizing verification, **LaborHack** reduces the inconsistencies common in traditional recruitment and provides a reliable pipeline for Canada's technical workforce needs.

## German For Girls In Tech

### German for Girls in Tech

<https://www.germanforgirls.eu/>  
Kenya, Uganda, Nigeria → GCC

**German for Girls in Tech** helps women with digital and technical skills access German job opportunities by removing the language and readiness barriers that usually block entry. The platform provides targeted German language training tailored to tech roles, along with career guidance and employer connections to help candidates meet hiring requirements.

By combining structured learning with job-matching support, the platform offers a clear pathway for African female tech talent to move into German-speaking roles. This creates a more predictable and accessible route for women aiming to transition from local tech jobs into Germany's growing digital workforce.

# Unbundled services



Cross-border jobs competition winner



## WorkAbroad

<https://tryworkabroad.com/en> Africa → Germany

**Workabroad** is a B2B AI SaaS platform that automates the entire process of recruiting, relocating, and integrating foreign workers into Germany. Their product **Mira.AI** streamlines every step document preparation, government forms, qualification recognition, language school coordination, onboarding, and employer/agency workflows.

The software reduces thousands of hours of manual work and minimizes candidate drop-offs, providing agencies and employers with a fully compliant, highly automated system. They are not an agency – they only sell software to agencies, employers, and (sometimes) governments.

**Workabroad** tackles one of the most operationally complex parts of cross-border hiring: managing Germany's regulated, document-heavy migration workflows.



Cross-border jobs competition winner



## Luka Africa

<https://www.luka.africa> Africa → Global

**Luka** is a last-mile neobank designed for Africa's migrant workforce, solving three major financial barriers: high agency fees, lack of credit, and no tools to build wealth.

**Luka** is building the financial infrastructure that migrant workers and recruiters rely on before deployment. By integrating pre-departure loans, savings tools, and employer-linked repayment structures, Luka reduces drop-offs caused by upfront migration costs and improves the reliability of candidate pipelines. Their model works because lending is tied to verified recruitment partners, structured milestones, and salary-based recovery – allowing them to underwrite risk more accurately than traditional consumer lenders.

# Unbundled services

## Vesti

### Vesti

<https://wevesti.com/alora> Nigeria, Kenya, Ghana → UK, US, Canada

**Vesti** provides ancillary services that help African professionals navigate global migration processes more easily. The platform offers visa guidance, documentation automation, relocation finance, and multi-currency digital wallets—addressing the financial and administrative barriers that often block cross-border movement.

By combining legal-tech tools with financial services, **Vesti** reduces the cost, uncertainty, and paperwork involved in relocating. Though it supports job matching through **Vesti** Jobs, its core value is simplifying the visa, payment, and compliance steps that workers need to securely move into countries like the UK, US, and Canada.

## NaviSmart AI

### Navi Smart AI

<https://www.navismartai.com/> Global

**Navi Smart AI** provides ancillary migration services that simplify the complex documentation and visa processes needed to move abroad. The platform uses AI tools to help users understand eligibility, complete forms, organize documents, and track application steps – reducing errors and cutting down processing time.

Instead of acting as a recruiter, **Navi Smart AI** focuses on the administrative layer of migration: paperwork, compliance, and decision support.

This gives workers a clearer and more reliable way to manage visas, permits, and relocation requirements when moving to destinations across Europe, North America, and the Gulf.

# Sector analysis



# Platforms have a unique opportunity to solve a host of worker problems



## Users face numerous barriers before departure

- **Exploitative fees:** Despite international bans, many African migrants still pay recruitment agents. Fees often range from \$1,500 to \$3,000 for Gulf domestic roles, for example, and rise further for semi-skilled placements, creating debt before departure.
- **Upfront costs:** Passports, visas, medicals, clearances, and training impose heavy upfront costs, frequently financed through high-interest loans. Recruitment financing remains a core bottleneck.
- **Documentation and identity readiness:** Missing or inconsistent passports, certificates, police clearances, and medical records delay or block access to legal pathways, pushing workers toward informal routes.
- **Information and trust gaps:** Workers often rely on informal channels such as WhatsApp or Facebook for job information and lack reliable, verifiable details on contracts, wages, rights, and recruiters. Unverified actors and opaque practices increase exposure to scams and exploitation, particularly for lower-skilled and digitally vulnerable workers.
- **Power imbalances:** Employers and intermediaries dominate negotiations, while workers have limited leverage. Opaque data and weak verification reinforce imbalances and constrain fair outcomes.



## The risks remain once migration is underway

- **Work permit vulnerabilities:** Many Gulf migrants fall into irregular or abusive conditions when permits are absent, invalid, or tied to restrictive sponsorship. Even valid permits don't guarantee protection.
- **Gendered risks:** Women workers in domestic, care, and hospitality sectors face unique vulnerabilities – from isolation and abuse to lack of legal protections and grievance channels – requiring explicit gender-sensitive safeguards.



## After arrival, many challenges present themselves

- **Early attrition drivers:** Poor housing, delayed pay, weak onboarding, and limited support often drive early exits. Attrition is frequently a systems failure, not a worker failure.
- **Uneven integration support:** Diaspora and peer networks are critical for integration & resilience, but access is inconsistent across corridors.
- **Financial services gaps:** Efficient remittances and basic financial tools shape the migrant experience, yet services that maximise take-home pay and long-term outcomes remain limited.

# Emerging platform models



## Ethical platforms can solve all these pain points for workers through:

- **Zero-fee recruitment for workers:** Shift costs from workers to employers to eliminate debt-driven vulnerability.
- **Transparency and recourse:** Provide verifiable contracts, clear pathways, and grievance mechanisms from offer through post-placement.
- **Retention as a product:** Address housing, payroll reliability, remittances, and worker support to improve wellbeing and deliver employer value through stronger retention.
- **Design for women:** Embed safeguarding, monitoring and recourse tailored to female workers in high-risk sectors.

## Platform models are emerging in response to deep misalignments in how value, risk, and control are allocated in labour mobility markets

- **Platform models are driven by pathways:** Europe typically requires a focus on skills and placement, the GCC focuses on for low/mid-skilled roles, where a lot hinges on management and compliance. Meanwhile, study-to-work models, for example, need skilling and college partnerships.
- **Demand-side value capture is skewed:** Most value accrues to actors closest to demand, from employers to staffing firms to recruiters. Control over scarce job slots and corridor specialisation creates durable moats, regardless of worker outcomes.
- **Incentives favour access over outcomes:** Intermediaries are paid for placements, not successful outcomes. Value is captured by controlling access to jobs rather than improving readiness, match quality, or retention, leaving a missing middle for outcome-driven platforms.
- **Skills remain a binding constraint:** Many employer-sponsored pathways require language or licensing thresholds, yet few players have effectively integrated skilling with global placement at scale, creating high failure rates and drop-offs.
- **Retention becomes a product:** Leading platforms replace debt-based lock-in with service-based retention, such as housing, payroll reliability, care, and compliance, improving outcomes for both workers and employers.
- **Margins follow responsibility:** The closer a platform moves to payroll, housing, and regulatory responsibility, the greater its pricing power and defensibility.

# An ecosystem is forming to tackle fragmented and unregulated migration chains

## ■ **Political and policy swings as market shapers**

Labour mobility is economically powerful, but politically charged and operationally risky. Pathways expand and contract with electoral cycles. Visa quotas and migration rules in destination countries ultimately define market size. While high-income countries are expanding work visas overall, individual markets move in cycles, opening to fill shortages and tightening through wage floors, caps, or qualification thresholds. Constant policy change creates sustained demand for advisory, compliance, and visa facilitation infrastructure. Study visas are increasingly structured as labour migration pathways, with post-study work permits making international students a core feeder into workforce demand. With regular shifts, bad actors can turn “opportunity” into exploitation fast.

## ■ **Fragmented system in need of remedy**

Multiple actors across origin and destination countries create a dysfunctional migration chain with little coordination.

- No single actor owns end-to-end outcomes, typically optimising for their own piece of the chain.
- Even government-to-government programs and humanitarian pathways, while designed to streamline flows, often add parallel layers and actors that further increase fragmentation.
- This creates clear opportunity for platforms operating in “multiplayer mode” to coordinate, not replace, existing actors.

## ■ **Policy shift around African migration**

Recent shifts within the GCC have led to a prioritisation of hiring from Africa as quotas for South Asia are being quickly filled.

## ■ **Emphasis on fair hiring**

Recent pressures in the GCC have driven efforts in staffing companies and employers to regularise migration, but this varies significantly by employer. Success of platforms can be driven by adequate employer vetting to sort out the good apples from the bad, and positive intention can more easily flowed down to workers.

## ■ **Impetus to solve origin-side bottlenecks**

Emigration restrictions, weak training systems, fragmented credential recognition, and inconsistent MOU implementation continue to limit worker supply in many African countries, even where external demand exists.



# Our investment thesis

# Our 2026 investment thesis

Simple recruitment marketplaces fail to address the core challenge of labour mobility for most Africans. The problem is not matching supply to demand, but managing a complex, cross-border system where value, risk, and control are misallocated.

We therefore prioritise verticalised, full-stack platforms that take responsibility for outcomes across the migration lifecycle.

## The strongest platforms are characterised by:

- **Corridor depth over breadth:** Success requires solving deep constraints within specific corridor-sector pairs (e.g., medical professionals to EU) rather than broad matching. We avoid high-risk, exploitation-prone B2C sectors (e.g., domestic work) in favor of regulated, high-value flows.
- **Employer of record advantage:** Value accrues closest to demand. Platforms that embed in destination markets, whether as service delivery providers or employers of record, capture recurring revenue by managing sponsorship, payroll, compliance, and liability. Models that stop at sourcing or placement leave most value on the table and leave most opportunity for exploitation.
- **Beyond brokerage, toward operations.** We back platforms that replace fee-charging brokers with accountable operators by digitising recruitment, vetting, and logistics, and by being judged on worker outcomes rather than one-off placements.
- **Multiplayer mode:** Owning the entire value chain is rarely feasible. The best platforms coordinate fragmented actors across origin and destination countries, stitching together governments, quality employers, financiers, and training providers into coherent pathways rather than attempting to replace them.
- **Integrated enablers, tailored to context:** High-barrier corridors require skill and placement models that bridge language and licensing gaps. Scalable corridors require fair migration financing tied to verified contracts to remove upfront friction for workers. These enablers strengthen core platforms but are rarely compelling as standalone businesses.
- **Strong compliance and verification architecture:** Given the fraud and lack of transparency characterising the system, anti-fraud checks, responsible recruitment guardrails (e.g., fee transparency, worker consent logs, data protection, and worker protection/grievance mechanisms are critical.