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2020-12
Southern Centre for Inequality Studies (SCIS)
https://hdl.handle.net/10539/33902
Ali, R. and Muianga, C. 2020. The future of work(ers) in Mozambique in the digital era. Future of Work(ers) SCIS Working Paper Number 8. Southern Centre for Inequality Studies, Wits University.

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FUTURE OF WORK(ERS) RESEARCH PROJECT

THE FUTURE OF WORK(ERS) IN MOZAMBIQUE IN THE DIGITAL ERA

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December 2020

SCIS Working Paper | Number 8

The Southern Centre for Inequality Studies
University of the Witwatersrand
South Africa

www.wits.ac.za/scis

UNIVERSITY OF THE WITWATERSRAND, JOHANNESBURG

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Acknowledgements

The Future of Work(ers) Research Project at the Southern Centre for Inequality Studies is supported by the International Development Research Centre (IDRC), the Ford Foundation and the Friederich Ebert Stiftung South Africa.

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The Southern Centre for Inequality Studies (SCIS) is the first research institute of its kind in the global South. It draws on the intellectual resources of the University of the Witwatersrand and partner institutions in South Africa and beyond, to host an interdisciplinary research and policy project focused on understanding and addressing inequality in the global South. Research foci include wealth inequality, black economic empowerment, the gender pay gap, Covid-19 and the future of work(ers). The Future of Work(ers) research project explores how digital technologies are reshaping the world of work and the impact of these changes on inequality. The project defines work broadly to include both productive and reproductive activities in the formal and informal economy. It conceives of the development and application of digital technologies as a contested terrain. It is particularly interested in how collectives of workers shape what digital technologies are developed, how and to what end; and the economic and social policies that have been leveraged in response. In order to capture the diversity of the global South the project has selected the following case countries: Colombia, Ethiopia, India, Mozambique and South Africa. Visit our website: www.wits.ac.za/scis

Recommended citation:

Ali, R. and Muianga, C. 2020. The future of work(ers) in Mozambique in the digital era. Future of Work(ers) SCIS Working Paper Number 8. Southern Centre for Inequality Studies, Wits University.

Abstract

As the digital platform economy and gig work have been accelerating, new expressions of work and tensions over working conditions, value creation and distribution, and over labour relations and regulation, are also emerging in Mozambique. Although digital work is still at an incipient stage in the country given the low access to information and communication technologies (ICTs) for the majority of the population and their socioeconomic profile, ICT access has expanded over the past decade. The number of start-ups enabling digital work has risen in the past five years and more recently amid the Covid-19 pandemic. Research on social conditions of digital gig work in Mozambique's economy remains largely unaddressed. Following a political economy approach, this paper explores how digitally mediated forms of work are (re)shaping, changing or exacerbating the existing nature of work and what questions it poses for the future of work(ers) in Mozambique. We argue that, in the current pattern of growth in Mozambique, labour markets have a fragmented nature where work is dominated by informal, irregular, unstable and insecure social conditions. The preliminary primary evidence from digital gig workers shows that the organisation of digitally mediated work seems to reproduce the existing disruptions within labour markets. This seems acute in a context where digital gig work is not yet legislated and trade unions are absent. The future of workers depends on the broad organisation of socioeconomic structures and relations which shape the nature of work, structurally linked to processes of accumulation on a global scale. A failure to broadly analyse work beyond the physically sphere, including the digitally mediated forms of work and its intersections with paid and unpaid forms of work, has implications for the design and effectiveness of public policies on labour.

Keywords: Labour markets, digital platforms, gig work, accumulation, political economy, Mozambique

Introduction

The future of work(ers) has become a worldwide concern amidst the rise of digital technologies, flexibility of labour markets and global capitalist economies. Digital-economy dynamics spur digitally mediated forms of work, both paid and unpaid. However, questions on the organization and the future of work(ers) persist at different levels. On the one hand, digital gig work is seen as a window for job opportunities as well as flexible hours and places of work in a context of noticeable unemployment and underemployment in the global South (Rani and Furrer, 2020; World Bank, 2019). On the other hand, digital gig work is regarded as an expansion of informal, insecure, disrupted forms of work and global fragmented class structures, in a context of socially and spatial dispersion with limited or no regulation or workers' organization, suggesting the need

to address digital work from the perspective of workers and their households (Fuchs and Sevignani, 2013; Fuchs and Mosco, 2016; Parthasarathy and Matilal, 2019; Stevano, 2020).

In Mozambique, resorting to remote and digital platform work is still at an incipient stage, given low access to information and communication technologies (ICTs) by most of the population and their socioeconomic status, especially in rural areas. Despite this, ICT access has expanded over the past decade and there has been a rise in the number of start-ups that enable digital gig work over the past five years. Research, official data and debates on digital platform work and gig work in Mozambique remain largely unaddressed and are immersed in a dualistic approach to the economy and dichotomies in labour markets (Ali, forthcoming). Existing analysis places considerable emphasis on entrepreneurship initiatives, flexibility of labour markets and independent contractors, disregarding the broad heterogeneous and interdependent forms and relations of labour. Nevertheless, as digital platform and gig work have been accelerating, mainly during the current Covid-19 pandemic, the contradictions between this emerging sphere of work and the social conditions of labour also seem to intensify in the current pattern of growth. New and exacerbated tensions over labour conditions, relations and regulation, as well as conflicts over value determination and distribution, appear to emerge in the dominant processes of accumulation.

Following a political economy approach, and by looking at labour markets from a broader perspective (including both paid and unpaid forms of work), this paper revolves around labour market patterns, dynamics and tensions, in both physical and digital spheres, in the process of accumulation. It examines how digitally mediated forms of work are (re)shaping, changing or exacerbating the existing nature of work and what questions it poses for the future of work(ers) in Mozambique. This understanding requires looking at digital platform and gig work beyond the digital sphere to situate the gig economy in the socioeconomic structures that differentiated gig workers are part of.

The paper argues that the current mode of organization of production, service provision and work in the digital platform economy seems to reproduce the informality, irregularity and instability of work that are dominant in the prevailing pattern of growth in the country. Further, the future of workers in the digital era depends on the broad organization of socioeconomic structures and relations which shape the nature of work, organically integrated in processes of capital accumulation on a global scale. Its findings highlight that Mozambique's productive structures have been limited in generating decent work. The prevailing pattern of growth is driven by

investments in natural resources and dependent on export-oriented production of agricultural, energy and mineral primary commodities with low or no processing and limited productive linkages in the economy, with disrupted and differentiated labour markets dominated by informal, irregular, unstable and insecure social conditions (Castel-Branco, 2014, 2017; Ali & Stevano, 2019; Ali, forthcoming, 2020). A failure to conceptualize and broadly analyse work in all its structures and spheres, digitally and physically, and its intersections in paid and unpaid forms of work, has implications for the design of public policies on labour and employment. Analysing the current organisation and social conditions of work, as well as its future, without looking at the productive structures that both shape the structures of work and are in turn structured by the structures of work may lead to misguided policies.

This paper is organised in five sections. A note on methodology concludes this section. The second section provides an overview of the global digital economy and the different approaches to what constitutes digitally mediated work or digital work more broadly, as well as some tensions that may affect workers' organisations and their future. Drawing on official statistics and original primary research conducted by the authors, the third section looks at the nature of labour markets within the dominant patterns of accumulation in Mozambique. The fourth section locates the digital economy within Mozambique's economic structure and analyses the dynamics of digital gig work and how digital technologies have been (re)shaping its current organisation and what questions it poses to the future of work(ers), based on exploratory interviews we have conducted with workers in Mozambique during 2020. The conclusion emphasises the urgency of transforming the prevailing organization of the socioeconomic system and of work.

Research strategy and challenges

This research draws upon a triangulation of quantitative and qualitative data. Quantitatively, secondary data and existing surveys on labour market and population censuses were analysed. Qualitatively, interviews were conducted between August and October 2020 and included key actors in the digital economy, gig workers, trade unions representatives, government officials from the Ministry of Labour and Social Security and the State Secretariat for Youth and Employment, and some start-up co-founders.

One of the initial challenges in this research was the lack of any study or research on the platform economy or digital gig work in Mozambique. Almost no data was available about this topic, besides the number of workers subscribed on one platform, meaning it was difficult to situate the study.

The absence of data about users (from the demand side), which would provide us with information about the use of apps for delivery services and the recruitment process, is also a particular limitation. Therefore, literature on digital economy and digital labour mostly related to the global North and the global South was helpful to conceptualise the research. This was followed by a search of existing digital platforms. Our intention was to draw a sample of platforms and, from this, choose two or three as case studies in which we could conduct in-depth interviews with workers and possibly with platform managers or owners. This was not easy, as interviewing was a major constraint. Most workers were not available for an interview and many were reluctant to be interviewed, especially those from delivery platforms (food and transport). However, from those available, we managed to employ snowball sampling and it was possible to establish the necessary trust to secure further interviews. The interviews were conducted in Portuguese, mainly with digital 'gig' workers registered on the *Biscate* platform, and some from two delivery platforms, Company A and Company B. Generally, interviews were conducted by phone call, which was another limitation. Former workers of these platforms were also interviewed. Another constraint concerns the fact that the chosen delivery platforms have very few workers (fewer than 10 workers, including administrative staff). Workers were asked about their work stories and experiences before and during the ongoing platform work and about their future perspectives regarding their work status or contracts, wages, working conditions and social protection. The interviewed workers were mainly from Maputo although some workers from Gaza and Nampula were also contacted. These exploratory interviews may not be representative enough of Mozambique's platform-work landscape to identify and construct general patterns, despite offering relevant information to reflect on for future in-depth research.

Digitalization, the gig economy and the realm of work: a global overview

As the nature of technological innovation is rapidly changing, the rise in the digital economy has increasingly and rapidly become a global trend, reshaping the way different types of economic activities, including work, are carried out at various levels. According to the UNCTAD digital report 2019 (UNCTAD, 2019:2), 'the evolving digital economy is closely associated with several frontier technologies and fuelled by data' (such as blockchain, data analysis, artificial intelligence, 3-D printing, the internet of things, cloud computing and automation and robotics).

There are no widely accepted definitions of 'digital economy', as a range of terms related to this has arisen, carrying somewhat different perceptions: 'gig economy', 'platform economy', 'on-demand economy' to mention few. What these terms or concepts have in common is their linkages

with the mediation of activities by digital platforms. The term 'gig economy' seems to be widely adopted and even encompasses not-necessarily-digital intermediation. Healy, Nicholson and Pekarec (2017:232), for instance, describe 'gig economy' as 'the rapid spread of start-ups that connect and mediate between buyers and sellers in a range of markets, but particularly markets for in-person services'. Anwar and Graham (2020:1270) understand it as a 'system of economic exchange where organizations and individuals come together to get a variety of work done via digital platforms as intermediaries'. They use the term 'gig economy' to refer to the phenomenon of work being mediated by online platforms and concentrate on its geographical and digital focus. From these explanations, our understanding is that the 'digital economy' is a worldwide economic dynamic associated with the growing role that digital technologies play in mediating economic activities, including labour relations and the overall organization and functioning of contemporary capitalist economies at various levels (domestic, regional and global). Despite being a global dynamic, the digital economy geography is highly concentrated, with the USA and China accounting for about 90% of the market capitalization value of the world's 70 largest digital platforms. Furthermore, it has been suggested that, despite the growing importance of digitalization in the global economy,[1] challenges still exist on how to measure 'value in the digital economy', especially in developing countries where data producing capacities that could help to produce relevant information are still weak (UNCTAD, 2019:48). Related to these challenges, another issue is the distribution of this value among different actors along the entire value chain of the digital economy, who include gig workers, platform owners and developers. This raises the issue of power relations and dynamics in the gig economy and how gig workers, for instance, as a central part of value creation, are affected. Globally, these challenges are related to the 'different dimensions of the digital economy', associated with the absence of a widely accepted definition (UNCTAD, 2019:49).

This lack of a widely or universally accepted definition of the digital or gig economy is also a concern when it comes to understanding the type and nature of work undertaken in such an economy. Likewise, in the world of work, terms such as 'digital labour/work', 'gig work', 'platform labour/work', 'microwork' and 'crowdwork', associated with the 'digital/gig economy', have been commonly used (Graham, Hjorth and Lehdonvirta, 2017; Heeks, 2017). These terms have sometimes been used interchangeably, despite having important analytical differences associated with the fact that digital spaces vary across different contexts. Fuchs, for instance, has noted that, in debates about 'digital labour', less focus has been given to how to best define it and has argued that a better understanding of what 'labour and work are' is necessary to define its boundaries

clearly (Fuchs, 2014:23). For this, he suggests that Marx's theory of labour would be a helpful starting point. While finding a best definition of the term is still an issue, some define digital labour as paid and unpaid work undertaken in the digital economy (Bukht and Heeks, 2017). Others define it as waged and unwaged work taking place on digital media (Scholz, 2012). Others define [digital work] as 'the organization of human experiences with the help of the human brain, digital media and speech in such a way that new products are created' (Fuchs and Sevignani, 2013:237).

The differences in their uses certainly reflect different perceptions and approaches to the digital or gig economy, as digital/online/virtual spaces are not uniform. Understanding has become more complex as new research findings arise. For instance, a broader understanding of work, which recognizes productive and reproductive activities in both formal and informal settings (Ali and Stevano, 2019; Ali, forthcoming, 2020), can suggest a different understanding of digital space and the degree of digital penetration in particular contexts.

Regardless of what the definitions of these terms are, what is certain is that they describe important socio-economic dynamics associated with the growing digitalization of the global economy and the underlying impacts at various levels and in various dimensions of our lives, including the work and labour relations dimensions. There are certainly notable benefits arising from the 'digital/gig economy' more globally. Despite these benefits, concerns have increased over how digitalization – understood as the way digital technologies are being increasingly diffused – has created disruptions in the existing forms and social relations of productive and reproductive labour.

A common and widely shared concern, and a subject of great debates, is how ongoing developments in digitalization have impacted on the world of work and its future, in both the global North and South. This concern has increased with the rise of so-called 'digital labour' in the gig economy, and the need to study this more profoundly (Fuchs, 2014; Graham, Hjorth and Lehdonvirta, 2017; ILO, 2018). As the ILO stresses, the rise of 'online digital labour platforms' has represented 'one of the major transformations in the world of work over the past decade' (ILO, 2018:v). Graham, Hjorth and Lehdonvirta (2017:136–137) have pointed out that the emergence of digital labour 'has come about at a confluence of two trends', namely the global concern over 'un- and under-employment' and the 'rapidly changing connectivity' by which 'much of the world is increasingly characterized'. They point out that, in response to this confluence, 'millions of people across the world have turned to outsourced digital mediated work, as a way to transcend some of the constraints of their local labour markets'. It has been suggested, then, that

despite some notable benefits (such as the opportunity to undertake work from anywhere and at any time, allowing workers flexibility and job opportunities), workers on digital labour platforms have faced growing challenges regarding, for instance, their employment status, working conditions including adequate remuneration, social protection and other benefits (ILO, 2018:v). This has been supported by a wide range of studies that assess the impacts of the gig economy on more general labour dynamics. For instance, De Stefano (2016) has argued that the impacts of the exponential growth of the gig economy on labour rights have been overlooked. He suggests that, despite the opportunities provided by forms of work in the gig economy ('crowdwork' and 'work-on-demand via apps'), such as the possibility of providing a good match with employment opportunities and more flexible work arrangements, they can exacerbate the 'commodification of work', therefore the importance of recognizing the activities in the gig economy as 'work' (De Stefano, 2016:iii). This is because the gig economy is an integral part of a broader economic dynamic, characterized by increasing casualization and informalization of work, including the 'spread of non-standard forms of employment' (De Stefano, 2016:iii). In fact, the tendency to casualization and informalization of work has become a concern especially with respect to the future of work on a global scale.

Graham, Hjorth and Lehdonvirta (2017) suggest that, while there are 'important and tangible benefits' for a number of workers in the gig economy, 'a range of risks and costs that unduly affect livelihoods of digital workers' exist. They have raised four concerns associated with digital work, which are important to reflect on when it comes to thinking about the effects on the future of work. One is the limited bargaining power associated with the fact that workers in the gig economy lack of protection. Labour laws are often not applied to them because they are often classified as independent contractors and not employees. The other three, which may be linked with the first, are economic exclusion, intermediation and skill and capability development. They also reflect on four broad strategies to improve conditions and livelihoods of digital workers, namely 'certification schemes, organizing digital workers, regulatory strategies and democratic control of online labour platforms' (Graham, Hjorth and Lehdonvirta, 2017:138). These concerns refer, for instance, to the fact that there is a lack of government regulation of the gig economy in general and of the related digital work platforms, which set the conditions of work. Despite these platforms offering income opportunities for workers, the absence of labour standards governing them means that work cannot be reliable, making it difficult for workers to plan their daily activities (ILO, 2018). Another particular aspect that arises from this is the way in which remote gig workers 'exercise agency to earn and sustain their livelihoods in the gig economy' (Anwar and Graham, 2020:1269). These and

other aspects of the gig economy will better contextualise the discussion around digital gig work and the gig economy in Mozambique.

Labour markets and patterns of accumulation in Mozambique

Labour market patterns and relations transcend physical spheres to encompass the digital world of work, which over the past decade has experienced a rise in digital labour platforms and gig work. Throughout this paper, work is analysed broadly, including its interdependent forms in physical and digital spheres, both paid and unpaid, formal and informal, agricultural and non-agricultural (Ali, 2017). Labour markets are dynamic, differentiated and diversified incorporating a labour power that is not a mere factor of production or a commodity but is organically incorporated in the social system of accumulation (Sender, 1986; O'Laughlin, 1996; Fine, 1998; Harvey, 2006; Fuchs, 2014; Ali, forthcoming).

Methodological gaps persist in data collection and analysis of labour markets in Mozambique, limiting the understanding, design and effectiveness of public policies on the matter (Ali, 2017; Oya, Cramer and Sender, 2017). The mainstream analytical framework is dominated by a dualist perspective that separates the economy into two sectors – one considered modern (capitalist) and the other deemed traditional (precapitalist) – and divides the various forms of work within the economy into dichotomies such as formal/informal and waged work/unpaid work in subsistence production. The interconnections and interdependence between the two sectors are ignored by, for example, excluding unpaid work from labour markets and neglecting casual forms of wage work (Wuyts, 1978; O'Laughlin, 1996; Ali, 2017).

A wide range of evidence in the analysis of the Mozambican economy shows that, historically, labour power has been structurally integrated into accumulation processes (Castel-Branco, 2010; O'Laughlin, 1981; Wuyts, 1980). In the colonial era, the system of capital accumulation was based on the expropriation of the labour force for the extraction of surplus value, through the integration of the peasantry into the capitalist labour market and the goods market as a supplier of cheap labour and producer of cheap food and primary commodities for capital, on a regionally differentiated basis (Castel-Branco, 1994). This was only possible through the maintenance of the land-based peasantry, which, at the same time, engaged in wage labour and produced food for their own consumption and for the market. The peasantry's ability to produce this food, which depended on wages, was central to the reproduction of the labour force and to ensuring that it was available and cheap for capital (Ali, forthcoming). The interdependence between waged and

unwaged work remains central in Mozambique's pattern of growth (marked by the fragmented nature of labour markets dominated by irregular, unstable and informal forms of work) and contributes to capital accumulation. Labour is semi-proletarianised, non-organised and fragmented (Ali, forthcoming). When analysing labour markets within the historic specificities of the structure of Mozambique's economy, the different forms and conditions of work and social relations are crucial to understand the broad organisation and patterns of work and to reflect on the future of work(ers) in the current global dynamic of digitalization of the economy.

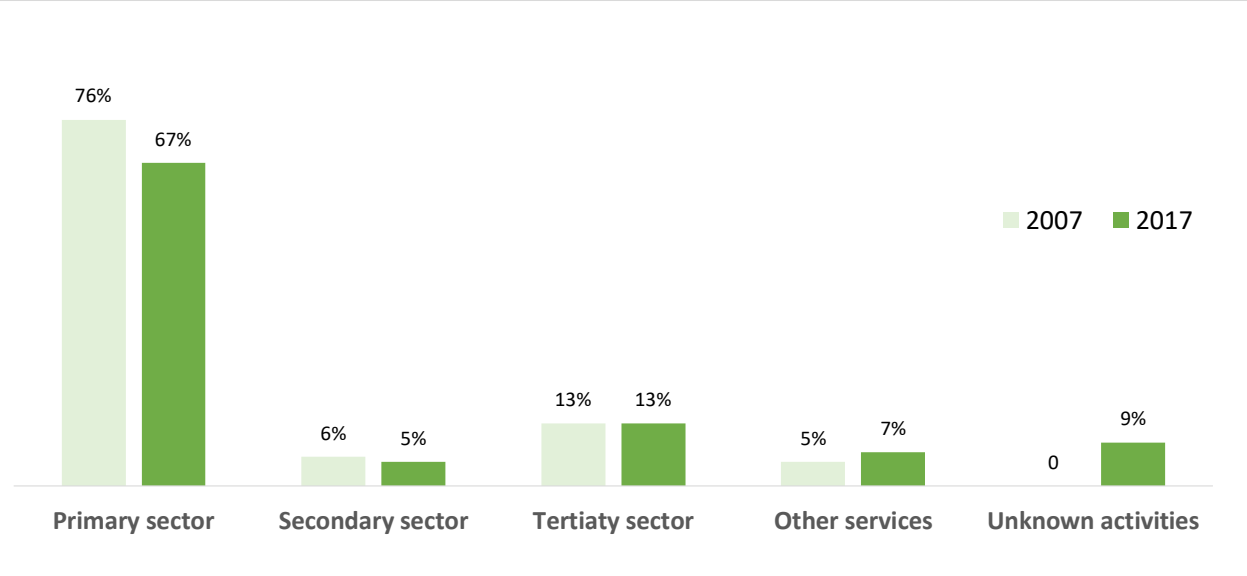
Mozambique's extractive productive structures fail to generate quality employment (Castel-Branco, 2014, 2017; Ali and Stevano, 2019; Stevano and Ali, 2019; Ali, forthcoming). The country's economy was considered a success story, given its high and sustained rate of economic growth which averaged around 8% annually for the past decade and a half, with the exception of the past five years, when it was halved (Castel-Branco, 2017; Jornal A Verdade, 2019). The economic structure is dependent on imports for consumption (especially basic consumer goods) and production. The growth of the past decade and a half was sustained by the concentration of production and private investment in the extractive core of the economy (including mineral and energy resources and agricultural commodities for export) and in the infrastructure and services associated with this extractive core. The extractive nature of the economy absorbs around 95% of total private investment and is marked by the specialization of exports in primary commodities of the extractive core (in mineral and energy resources, and in agro-industrial commodities) (Castel-Branco, 2017). Despite high economic growth, monetary poverty has remained high over the past decade and a half. Recent estimates indicate that the cost of a basic food basket may have increased between 55% and 70% in the period 2014 to 2016, which is reflected in a national poverty rate of 55% to 60%, representing an increase from the 46% estimated by the *2014/2015 Household Budget Survey* (HBS) (INE, 2016; Mambo, Paris, Salvucci, and Santos, 2018). Besides, inequality in consumption has increased; the Gini coefficient[2] at the national level was recorded to have increased from 0.42 in the 2008/09 HBS to 0.47 in the 2014/15 HBS.

The demographic structure of the country is quite young, with a median age of 17 years and an average life expectancy of 54 years. In 10 years (2007 to 2017) the total population increased by nearly 35%, having reached around 28 million inhabitants in 2017 (INE, 2019). The majority of the population (about two thirds) lives in rural areas and about two thirds of the total economically active population (EAP) is classified in the *2017 Population and Housing Census* as being in agriculture, and almost the same ratio of people declared their main activity to be 'peasant'. Moreover,

according to the official data shown in **Figure 1**, in the past 10 years, besides the majority of the EAP still being involved in agricultural activity (which declined slightly) followed by the tertiary sector (which remains static), there is a reduction in the total EAP's share in the manufacturing sector, which may be a sign of deindustrialization in the country that is consistent with the evidence about the structure of the Mozambique's economy.

Nonetheless, the gaps in the surveys and collection of labour statistics limit an in-depth image of the occupational structure from the official data. The Census's surveys focus on the main activity in the week of reference (past seven days), have exclusive categories and lack multiple categories, which results in the neglect and underestimation of wage labour patterns, particularly in agriculture, and their resultant interdependence with a variety of other economic activities. The category 'unknown' has a noticeable share of the EAP, meaning that a bigger share of the EAP is unknown (around 9%) than is known to be involved in the secondary sector (around 5%). It is problematic to analyse the structure of the work on the basis of this data. This is because the unknown category may, among others, include parts of the EAP involved in any of the other sectors as well as those omitted and not covered by the official categories, as is the case with digitally mediated forms of work.

Figure 1. *Economically active population by sector of activity in Mozambique, 2007-2017*



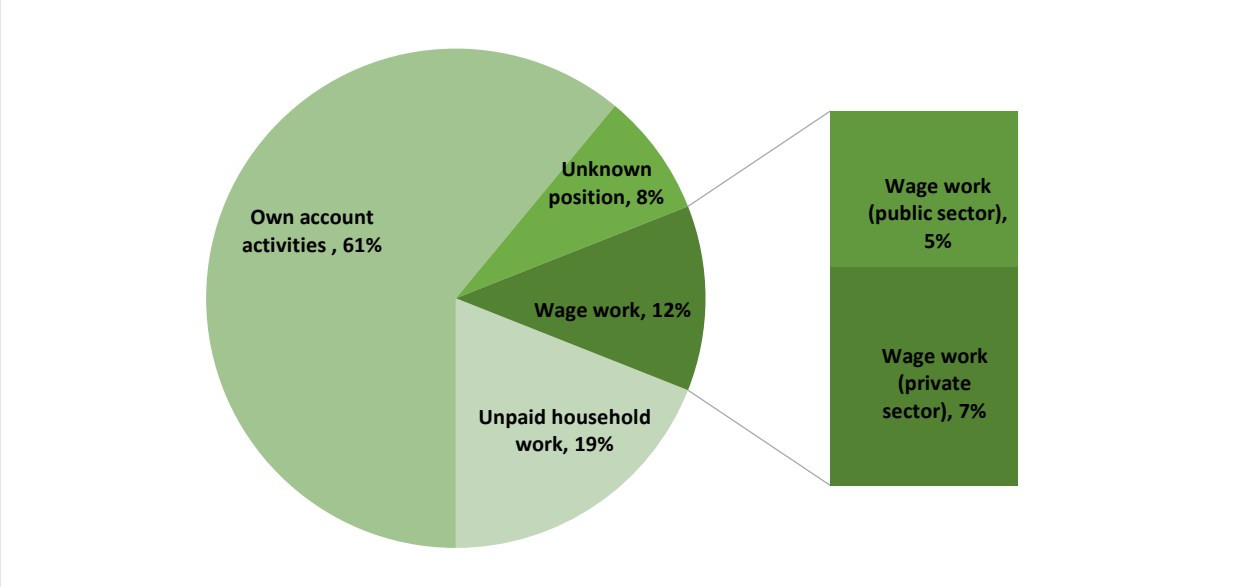
Source: Ali and Stevano (forthcoming; estimates based on the 2017 Population and Housing Census)

In addition, the majority of the EAP in Mozambique is involved in informal activities (around 88%) as shown in **Figure 2**, which based on the 2017 Census, meaning that only 12% of the EAP has 'formal' waged work. Despite the methodological gaps in official employment statistics, it is

possible to note the pre-eminence of informal forms of work that do not exclude forms of wage labour (Ali, forthcoming). According to the same data, most of the EAP is doing own-account and unpaid work. The question that emerges is around the position occupied in the labour process by agricultural workers (waged or unwaged), who dominate the EAP-occupation structure as the main occupation in which the majority of the EAP (around 70%) are involved (INE, 2019).

Another aspect worth mentioning from official labour statistics, in addition to the gaps regarding unemployment and underemployment, is the 'unknown' category. The high proportion of the EAP in an 'unknown' category in the labour process increases the invisibility of the diverse forms of occupation that characterize the labour markets, underestimating their nature and intersections.

Figure 2: *Economically active population in the labour process in Mozambique, 2017*



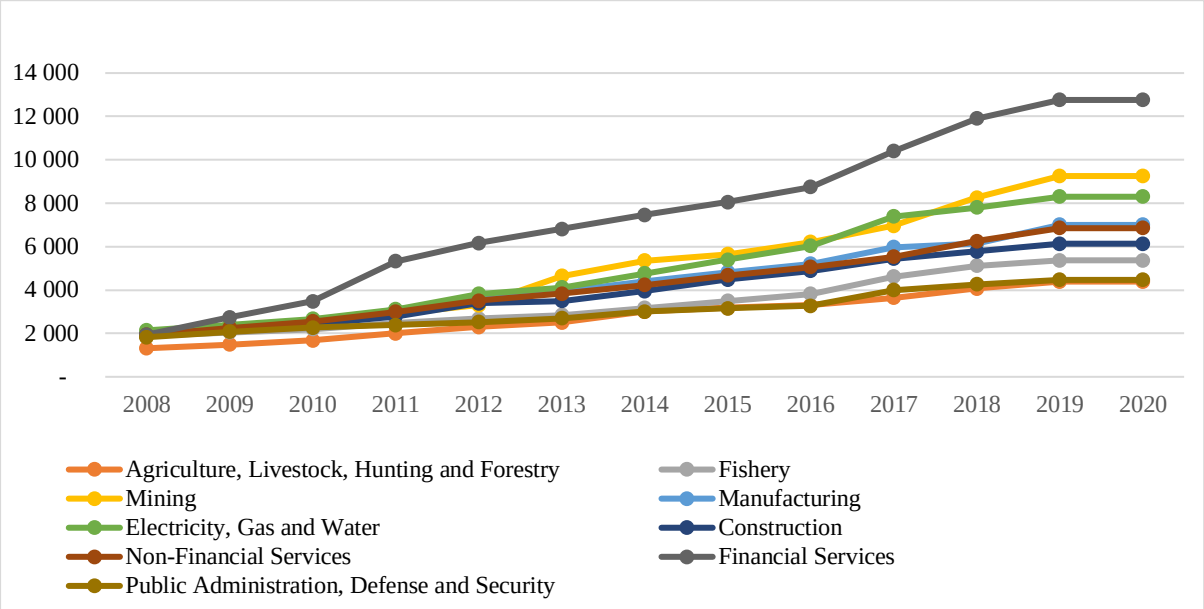
Source: Ali (forthcoming; author's estimates based on the 2017 Population and Housing Census)

An issue that emerges with the global dynamics of digitalization of the economy concerns the registration – not captured by the official statistics – of salaried workers based at home or those in the 'gig economy' circuit, mediated by digital platforms. Many people, especially those in informal forms of employment, may be invisible in the statistics about the EAP, and may be classified as either unemployed or family workers without remuneration (Ali, forthcoming).

Furthermore, the minimum wage is another central dynamic affecting the structure of the labour market. Over the past decade, (nominal) minimum wages have been rising steadily, except for 2020 (**Figure 3**).[3] Despite this rising tendency, it continues to be a major challenge as the actual minimum wage is well below the cost of living. Employment categorised under the sectors

'agriculture', 'fishery' (comprising together more than 60% of total EAP, according to the 2017 population census, as mentioned already) and 'public administration' have the lowest minimum wages, while 'financial services', 'mining' and 'electricity, gas and water' have the highest minimum wages.

Figure 3: *Mozambique's minimum wage by sector, 2008-2020 (Meticals)*

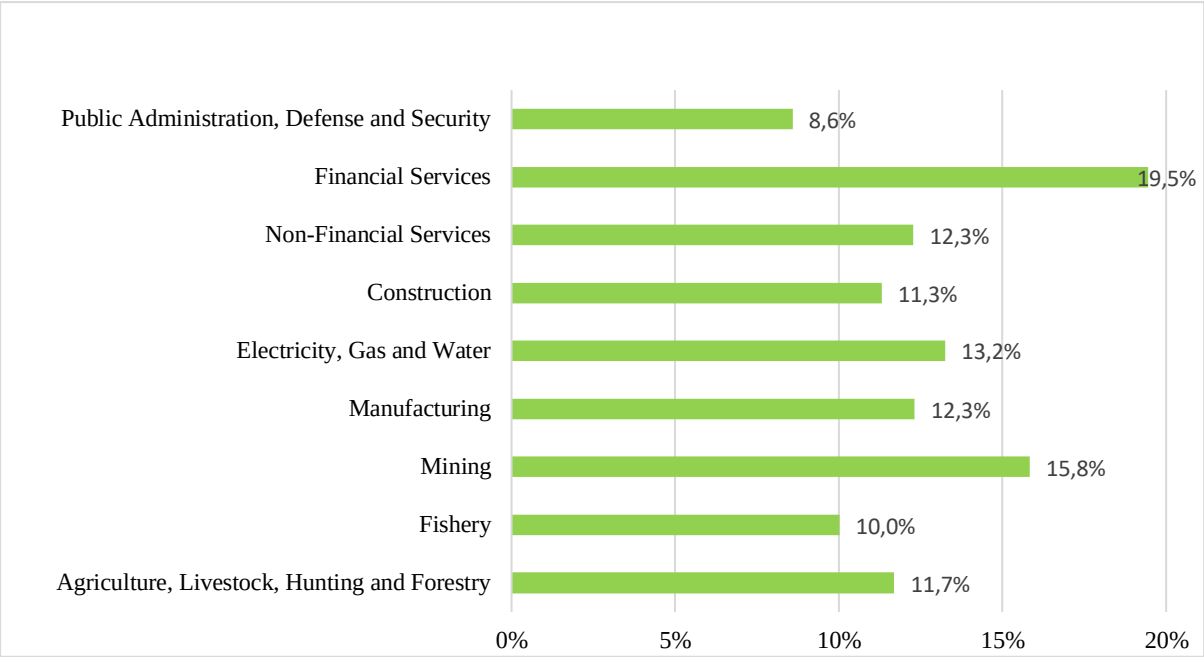


Source: Hanlon (2010, 2018); Club of Mozambique (2019)

Between 2009 and 2019, minimum wages have risen by an annual average of about 11% in agriculture and about 19% in the financial sector (**Figure 4**).

Interestingly, the sectors with the highest minimum wages are the ones that have higher annual average rates of growth. Despite the rise in minimum wages over the past decade, concerns about the capacity for sustaining livelihoods and basic needs, such as food, health, transport and electricity, have grown. After rising slowly but steadily from 2010 to 2014, real wages (adjusted for food inflation) dropped dramatically in 2015 and 2016, indicating the deteriorating purchasing power of workers (Muianga, Ali, Ibraimo and Langa, 2018). This happened as the Mozambican economy entered a crisis which is largely the result of a decrease in main export commodities. This decrease has resulted in currency depreciation and consequent high inflation, as Mozambique depends on imports of basic consumer and intermediate goods, particularly food. Food prices rose by 18% and 36% in 2015 and 2016 respectively.

Figure 4: *Average annual growth rate of minimum wage by sector of activity, 2009-2019*



Source: Hanlon (2010, 2018); Club of Mozambique 2019

Digital and platform economy in Mozambique: A tour of gig work(ers)

Despite a relatively rapid expansion of digital infrastructure and technology, Mozambique is still in an early phase of digitalization. The development of information and communication technologies (ICTs) has its own pace, conditioned by the nature of growth and stage of development of the domestic economy as well as its degree of interconnection with the global economy. Although certain elements of digitalization can be found directly and indirectly in almost all sectors of the economy, both formal and informal, there are still important challenges in assessing how digital technologies have been impacting on work and the nature of labour markets. These challenges reflect the relative absence of a clear understanding of the nature and structure of the 'digital economy' as well as how 'digital work' is characterized in the specific conditions of Mozambique. We can even raise some questions for reflection, and, from these questions, attempt to make sense of the digital economy in Mozambique and the related labour dynamics. How do we locate Mozambique in this global digital dynamic? If measuring the 'digital economy' is not a straightforward exercise (UNCTAD, 2019), can we plausibly identify or classify 'digital gig workers' in Mozambique? If yes, who are they and what are their characteristics? What kind of work do they usually do? Do they differ from the digital gig workers who are usually studied in the global North and other parts of the global South? These and other potential questions are useful

as a point of departure for understanding and defining the boundaries of the digital economy and the associated work dynamics in Mozambique.

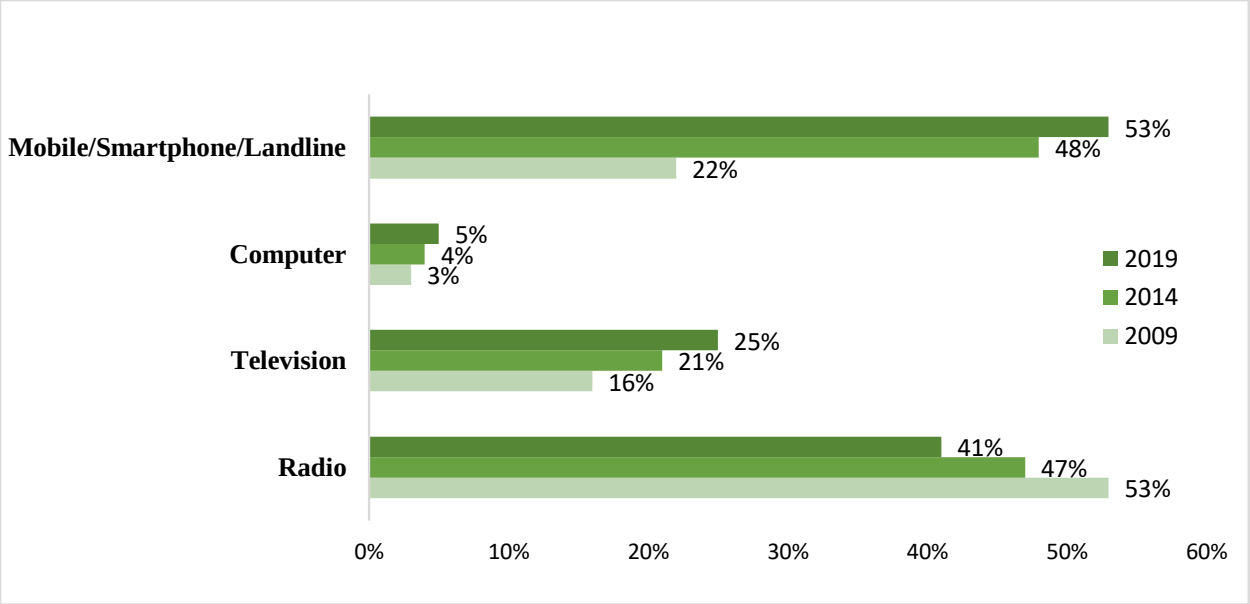
The complexity of the nature of work cuts across the boundaries of various spheres, formal and informal, urban and rural, digital and non-digital and so on, as presented in the analysis of the Mozambican labour market in the previous section. Given the high informality of the economy and the intersection between various forms of work and conventional formal employment, it becomes even harder to estimate the number of people involved in platform work as the gig economy expands. Therefore, we need to define clear boundaries for the definition of digital work in the context of Mozambique, as not all digitally mediated services should be understood as digital work.

As the 'digital economy' has just begun to penetrate the so-called traditional sectors (such as agriculture, tourism and transportation) in developing countries (UNCTAD, 2019), we may still argue that Mozambique is experiencing its early stage, despite the rapid surge of digital services and products and digitally meditated work platforms over the past decade. The mobile phone, first introduced in 1997 by Mcel,[4] and the internet revolutions of the past two decades are undoubtedly some of, if not the most, important dynamic behind this surge in digital products and services. As a result of ICTs' expansion and increasing accessibility, the use of mobile phones has represented one of the most significant changes towards increasing digital connectivity.

According to the companies Hootsuite and We are Social,[5] as of January 2019, the total number of mobile subscriptions in Mozambique was 14.26 million, representing about 46% of the population (We are Social and Hootsuite, 2019). The number of internet users was 5.43 million (representing an 18% internet penetration).[6] About 2.5 million people were active social media users, of whom 2.2 million were mobile social media users. To mention just some important dynamics, the percentage of people using mobile communication devices or tools has increased over the past five years. The percentage of population using the internet (via phone or computer) has increased from 4% to 9%, smart phones from 9% to 14%. There has been no major change in the use of the basic telephone, nor the computer, laptop or tablet. Although access and possession of mobile phones can still be considered low, these figures have shown rapid increase over the past decade, and more people are now interconnected and connected with a wide range of services, from financial to utility and goods and services payments. The FinScope consumer survey for Mozambique found that the percentage of households possessing mobile or

smartphones has more than doubled since 2009, while owning a computer has increased very slightly (**Figure 5**).

Figure 5. *ICTs household ownership, 2009-2019*



Source: FMT (2015, 2020)

Ownership of and access to mobile phones directly and indirectly expose people to digital/virtual spaces. These have coincided with increasing use of mobile money. Three mobile money providers in particular, mKesh (since 2011), Mpesa (since 2013) and e-Mola (since 2017), have been linked to the three main mobile phone operators in Mozambique: Mcel (now Tmcel), Vodacom and Movitel respectively. This demonstrates that there have been significant changes in the financial sector over the past decade (FMT, 2015, 2020). The increasing use of mobile money has played a significant role in accelerating access to financial services, as digital financial services are being used to expand the distribution of financial services outside the traditional branch and ATM channels. Mobile money services grew significantly with substantial investment by mobile network operators to expand their coverage and promote the use of these services. Vodacom Mozambique has become the dominant player in the mobile money sector in Mozambique through its Mpesa platform, which has become a main mean of financial transaction across the country, surpassing mKesh which was the first mobile money platform in Mozambique. Mpesa is now integrated into four major commercial banks in Mozambique (Millennium BIM, Standard Bank, BCI and, more recently, Banco Único), helping to widen the Mpesa ecosystem for its customers.

The analysis presented above has suggested that the financial sector has benefited the most from increasing digital connectivity. In fact, digital expansion, through increasing use of mobile phones,

is said to have increasingly contributed to financial inclusion and has been driving many commercial activities (FMT 2020). Mobile money is today a dominant platform in the world of financial transactions, especially in the informal sector. It is notably an important advance in terms of digital integration, particularly in very localized sectors.

The surge of start-ups and companies focused on creating and producing digital content for a variety of public and private companies is also an indication of the growing role digital platforms have been playing over the past few years. This has become a particularly important dynamic as more activities in the so-called traditional sectors (agriculture, industry, tourism, and so on) are starting to be digitalized, or at least carried out through some digital platform intermediation (UNCTAD, 2019).

Despite the concentration of digital technologies in the financial sector, there is a range of 'digital' initiatives that have been carried out over the past years. As an increasing number of people are becoming connected through digital platforms, there seems to be room for more in-depth empirical investigation into how digital technologies are (re)shaping the world of work in Mozambique and its future.

Digital technologies, labour platforms and the organization of work(ers) in Mozambique

The past five years have witnessed the increasing presence and use of digital platforms related to service delivery, including transport (taxi services) and food delivery (for example, Deliva, Speed Taxi and Delivery), a range of e-shop or e-commerce platforms linked to supermarkets and other good and service providers (such as Bazara and Moogle), and an informal-enabling labour recruitment platform, *Biscate* (local term used in Mozambique for a casual or piece-rate wage work).

Although not yet systematically studied, these events have certainly changed and reshaped the way work is undertaken in particular sectors or types of activities.[7] How digital technologies have (re)shaped the world of work and its future in Mozambique is an issue for in-depth study. Although the country is in an early stage of digitalization, it is possible to locate the emerging dynamic of digitally mediated forms of work within the economic structures and in the nature of labour markets by posing some questions based on exploratory research. There is a range of issues reflecting the nature of labour markets and of the Mozambican economy (Ali, forthcoming) and the degree of digital penetration in a range of sectors, as discussed in previous sections, and in people's work experiences and general organisation of work and livelihoods, as is addressed in this section.

The study is based on an exploratory analysis of the experiences of workers engaged in formal and informal digital labour platforms, and was mostly conducted digitally in the midst of the Covid-19 pandemic. It aimed to make a preliminary mapping and get an understanding of how different workers engaged in digitally mediated forms of work, the social conditions of their work and the challenges around the broad organization of work they are undertaking. It was hoped that this would provide insight into how all these aspects together may affect the future organization and dynamics of work.

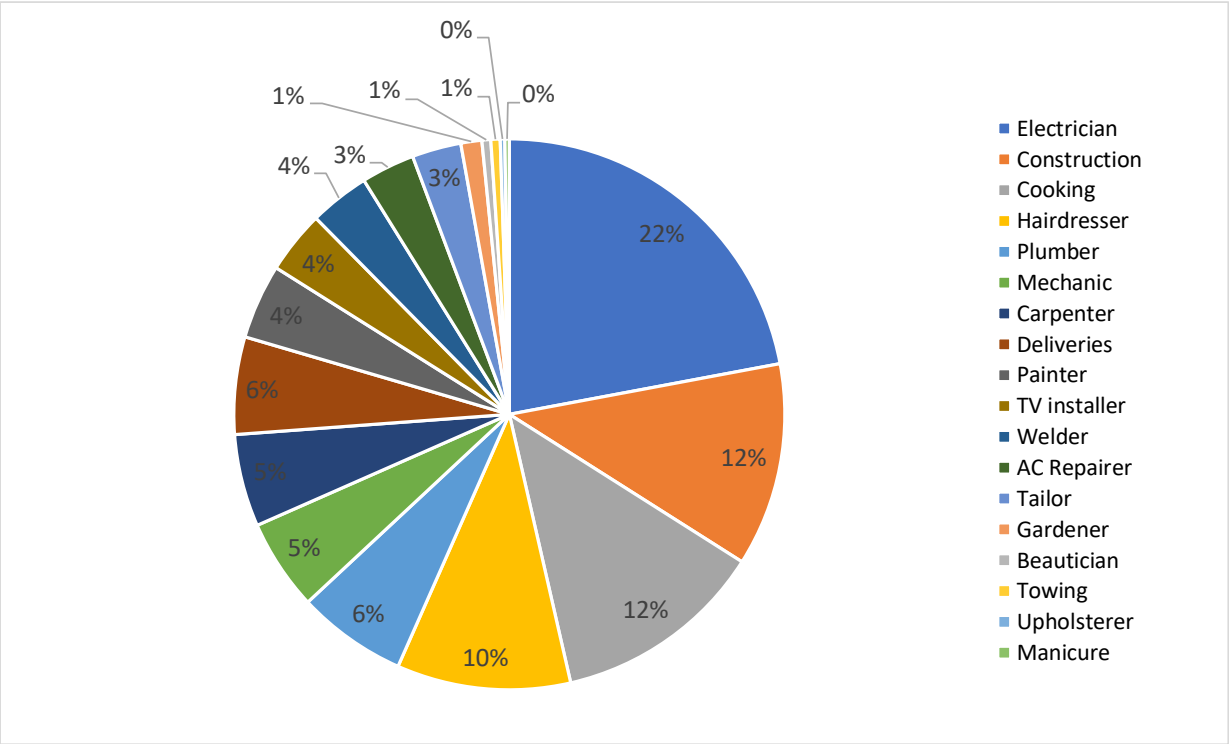
Gig work through digital-platform arrangements is an embryonic dynamic, as many of the digital labour platforms have been founded in the past five years and are mostly concentrated in the capital city, Maputo. In this exploratory study, we looked at workers' experiences in some of these digital labour platforms, specifically considering two different sorts: (i) preliminary cases studies with wage workers from two formal delivery services providers, Company A and Company B; (ii) exploratory interviews with registered workers in the informal-enabling labour recruitment platform *Biscate* (that attempts to connect registered gig workers located throughout the country to clients or employers). Around two dozen gig workers were interviewed. These workers have been registered as electricians, plumbers, cooks and delivery workers, located in provinces such as Gaza, Nampula and Maputo, the last accounting for around 85% of the workers' interviewed.

One of the digital platforms for delivery services operating in some parts of Maputo city, Deliva, is part of an African platform company for food delivery services, We Deliva.[8] It has been operating in Mozambique since 2018 and employs no more than 10 workers. Besides the web-based portal and the mobile application and Facebook page, food can be ordered through phone call, SMS (short message service – a text message) or WhatsApp, which are used the most according to the company's customer services. The company uses motorbikes to deliver the products to its customers. They are currently active in some areas of Maputo and usually deliver every day from 10 am to 10 pm.[9] Another emerging digital platform for delivery services, Speed Taxi and Delivery, has operated in Maputo and Matola cities since the first quarter of 2020, and employs around eight workers. Beyond this service provision, they provide audio advertisement services and cargo and freight services. They use moto taxis (famously called as *txopela* in Mozambique) to deliver the products to the customers. The delivery services can be ordered through a phone call, SMS, WhatsApp or a Facebook page. They have a mobile app but it is not active yet. Normally, work is carried out between 11am and 8pm. The company has 22 partners,

including restaurants and a variety of shops. The delivery services are ordered through mobile application, phone call, SMS or WhatsApp.

Biscate is an online platform (with the portal www.biscate.co.mz and mobile application in the app store, Google Play). It was founded in June 2016 by the software solutions start-up UX Information Technologies (UX). UX, which has been considered a reference point in the development of innovative digital platforms in society, first created an online job platform in Mozambique (www.emprego.co.mz). The *Biscate* platform aims to connect informal workers (also labelled 'independent', 'freelancer', 'handyman', 'odd-job' and 'temporary workers'), with different skills, types of occupations and geographical locations throughout the country, with clients and employers in the Mozambican services market. Workers are sorted by occupation type, experience level, and location. This is done through Unstructured Supplementary Service Data (USSD)[10] and SMS communications technology. This allows workers to register on the platform and possible clients/employers to access it using non-smart phones or non-internet-enabled mobile phones. At the same time, the information is channelled to those with internet access using a web-based system. The USSD technology is only available to users of the Vodacom Mozambique mobile operator which has an exclusive partnership with the UX company. Currently, this platform includes workers from 18 occupations and, according to one of the platform's co-founder, it may begin to include other occupations such as agricultural and trade. As of September 2020, it has registered around 35 729 informal workers, most of them from the most commonly registered occupations (electrician, cooking and construction) shown in **Figure 6**.

Figure 6. *Biscate platform registered gig workers by activity, 2016-2020*



Source: Authors' estimates based on the *Biscate* database of registered workers until 24 September 2020

It is worth noting, however, that while the workers' registration may open a window for a job opportunity, the number of registered workers on the platform database does not tell anything about the demand side, nor the patterns of recruitment process nor about the organization and social conditions of work and labour relations. The platform communication channel does not itself guarantee either access to jobs or an interaction between worker (or employee) and client (or employer). For instance, whether and how many workers have provided a service or get waged is unknown from the platform, which seems restricted to displaying a phone number which gives clients the possibility of getting access to an informal, differentiated and mostly socially non-organised reserve of labour force to employ. Although some gig workers interviewed, such as technicians in the field of electricity and plumbing, said they have occasionally been contacted for some casual work through their number displayed on the platform, others reported a different experience, as was the case for domestic and delivery workers. These workers reported that they rarely got an opportunity for work through registering on the platform, although with different experience. Others reported never having got any phone call over the platform, or that they did not know how they were registered on the platform.[11] Hence, there is a conflict between registration in the platform and the opportunity for getting a job. This conflicts with the narrative around gig work presenting greater flexibility and a drop in un/under-employment. The following

quote exemplifies one of these tensions in access to job opportunities, highlighted by the case of a worker, 'A', registered on the platform:

> ...sister [the co-author], since I had registered in this [platform] in 2016, when they came to the [informal] market while I was working there, I never received any call at least… I just registered my phone number because there was a promise of work and because it is not easy… we need to survive and they said we could get jobs through the platform…so I registered myself. (Interview with Worker A, woman, 28 years old, former domestic worker and currently home-based own-account worker on food orders in Maputo city, 11th August 2020)

Despite the lack of information from the demand side, which limits an insightful understanding of the recruitment process, the interviews with those, qualified and not-qualified, who got a job mediated by the platform,[12] provided insight into some tensions over the organization of work. These insights are summarized in **Figure 7** which also reflects characteristics of the nature of the pattern of organisation of work common to the other two digital platforms, notwithstanding their heterogeneous structures. Workers are heterogeneous, have different profiles and belong to differentiated household organisation, as well as differing in their experience of work and livelihoods.

The delivery service companies in the study employed wage workers, although in an arrangement as if they were 'independent' or 'freelancers'. They have no guarantee of stability or security of employment (as shown in **Figure 7**). From the exploratory research with workers, it appears that a mixed system of provision of formal services via informal arrangements for the gig workers is dominant. This is alarming in a context where forms of work mediated by digital platforms are still not regulated and hence not monitored by the Ministry of Labour and Social Security and where there are no collective schemes or trade unions for this group of digitally mediated workers, spatially and socially dispersed and with high turnover. The following quote exemplifies one of these tensions regarding the absence of any formal contract or social security scheme, as reported by Worker B from Company B, a driver with experience in postal services delivery and a former tourist guide who lost his job in the tourism sector as a result of the Covid-19 pandemic:

> We have faced many challenges, especially regarding our contractual status, we have not any formal contracts nor social security. We would like to have any support from the Ministry of Work and feel protected. We are not respected, and people do not value us despite the importance that the 'delivery' has for them. (Interview with Worker B, man, 37 years old, technical middle level, driver and formerly a driver at a travel agency and a tourist guide with previous experience at a private postal services company, Maputo 27 September 2020)

As Worker B stressed, despite not being recognized, many people are using this service and many households are being supported by this business. He mentions the emergence of 'illegal offices' providing these services and a more informal delivery dynamic. Some individuals informally provide delivery services over the weekends, and these people are well connected with some restaurants in Maputo.

Moreover, it is worth highlighting that the three digital labour platforms mentioned differ in many aspects, although they have some similarities in terms of the organization of work in the gig economy, as shown in **Figure 7**. Besides, the organization of work seems to have been changing, reflecting some adjustments in the delivery services' organization (such as the responsibility for the cost of the instruments, equipment or means of production, and the distribution of income generated in the companies). There are some tensions over working conditions in both platforms. There are also the issues of the lack of employment contracts, the determination of wages where some delivery workers seem to be paid on a delivery basis system (which depends on the number of deliveries done by a worker), the absence of or insecure occupational health and safety, social protection coverage and benefits, and other working conditions. Workers have a heterogeneous profile of experience, organization of work and livelihoods, broadly, as well as facing different working conditions. The following quotes exemplify some of the contradictions and tensions over the organisation of work, distribution of the value created and working conditions in the broad context of organization of work and livelihoods. These workers' experiences help to shed light for a reflection on the future of work(ers).

> …I was in the company almost from [the] beginning and I quit the job [in the delivery services company] because of the way work is organized… … in [the] beginning they used to give their motorbikes and now changing… The salary is MZN 7,000 (around US$95) but I received on a delivery basis where 20% I have to give them and remain with 80% but from this share I have to cost the fuel and motorbike maintenance, if in one day you don't have products to deliver you have no work…and also I had to deduct from my salary the costs of maintenance of motorbike and fuel… also when I had an accident they were more concerned [for] the food delivery than [for] my health situation… Since March I am working alone although having a wage work helps a lot in that conditions I was not seeing what I was doing and now I see my own money that I generate… even if I don't have work every day although with the pandemic the delivery for food and sanitation increased mainly during the emergency state. (Interview with Worker C, man, 28 years old, undergraduate student, motorbike driver and former worker at a private postal services company, Maputo, 9 September 2020)

> When the 'deliverer' is involved in an accident and eventually has a serious injury that makes him or her spend some time in a hospital, the company will only pay their incomes during a three-month period and after that the worker is left for their own [and] may even lose

his employment'. (Interview with Worker B, man, 37 years old, technical middle level, driver and former driver at a travel agency and tourist guide with previous experience at a private postal services company, Maputo 27 September 2020)

It is impossible to do another thing, I just arrive home at 9pm while I arrived at the company at 11am, and sometimes it is difficult to have lunch given the pressure of delivery, I have no contract of work … I have only one holiday during the week and it is too tired, but what can we do, there is no other option…it is a matter of surviving but if some opportunity emerges I will quit this job … it feels like slavery and this is not normal but what can I do … I need to eat and study …' (Interview with Worker D, man, 27 years old, former motorbike driver at a restaurant for 4 years, undergraduate studies, Maputo 13 October 2020)

Through this platform I had only three work opportunities since I registered on Vodacom in 2017, but two of these experiences were not good … first I worked as a housekeeper for a month and I quit because of the behaviour. I was treated as if I was a dog, like if I am not a human being and I have no house, they treated me as if I was nothing … When I asked for a contract the boss said 'The employment contract is my mouth and even if you had a job contract I could fire you because this is not state.' I quit after a month even if in need of wage work….another thing that happened with me through my platform is that some people take the number [from] the platform and cheat with us; when I quit that job I started cooking food to deliver [for] events or for individuals and once they ordered and did not take it. (Interview with Worker F, woman, 26 years old, cooking worker and former housekeeper, Maputo 15 September 2020)

I had some jobs through the platform but I had two experiences when I did a job and the agreed payment was reduced by half and the other where I hurt myself and the money they gave me I just used to take *chapa* [in local language in Mozambique a private transport] and go to hospital, I remained with nothing… that is why when I do a job which is daily paid basis I try to stipulate a payment that the work done deserves but people don't pay when you are a *biscateiro* (casual wage worker). (Interview with Worker G, man, 39 years old, technician plumber, Nampula, 2 September 2020)

These very brief work and life experiences reveal some contradictions which bring us to the prevailing nature of work and labour markets under the dominant productive structures. In other words – although with new expressions and forms of work which are, somehow, digitally mediated – the way the process of production and service provision is organized seems to reproduce the existing disruptions of labour relations and conditions.

Moreover, **Figure 7** maps the preliminary findings regarding common aspects characterising the organization and social conditions of work in the gig economy, based mostly on the interviews conducted in Maputo.

Figure 7. *Digital labour platform and gig work: Some exploratory findings on the organization of work*

Employment contract

- Differs amongst platform companies, although in 90% of the cases interviewed they were non-existent in written form and a verbal agreement, as in the cases of food delivery and domestic workers.

Wages

- The majority of workers are unclear about wage determination.
- Most receive wages on a daily basis.
- Many of the interviewed reported that they end up with earnings below minimum wage.
- Some get work for three to five days a month in gig work.
- Others though have defined monthly work, but depend on the availability of work to do - for example, delivery workers.

Hours of work

- Vary but are controlled by the employer.
- Some delivery workers and domestic workers seem to work more than eight hours, depending on the demand (which information was difficult to gather).

Occupational health and safety

- The majority of the interviewed are not covered; some are covered to a certain 'agreed' degree

Equipment, instruments and means of work

- This varies from company to company and also over time. Currently, for some delivery service companies, they are mostly provided by the workers, although in the establishment period these companies provided (for example motorbikes, fuel and maintanance).

Social Protection

- Not many are covered. For example, many workers interviewed declared no INSS registration, no unemployment insurance, no pensions or maternity leave and no occupational injury coverage

Collective organisation

- No trade unions or workers association for the digitally mediated (gig) work.

Regulatory framework

- Digital platform and gig work are not legislated yet in Mozambique.

Other conditions

- Low bargaining power.
- Precarious social and labour relations.
- Working under unsecure conditions and, in cases of accidents at the workplace, not covered.

As shown throughout this chapter, the informal, irregular and unstable patterns of work seem to expand in a context of social and spatial dispersion with limited or lack of regulation and absence of trade unions or other forms of workers' organisation for these group of workers. The future of workers in the digital era will depend on the broad organization of the socioeconomic structures and relations that shape the nature of work, social differentiation and inequalities, and are structurally integrated into processes of accumulation on a global scale. If the current organization of productive and work structures and relations remains unchanged, the future of workers will be a reproduction of the current nature of work and of the fragmentation of livelihoods.

Conclusions, challenges and policy options

This paper examined how digitally mediated forms of work have been (re)shaping and changing the nature of work and what questions this poses for the future of work(ers). The analysis of the structure of the labour market in Mozambique has suggested that any treatment of the way work has been affected by particular socio-economic dynamics must not ignore the broader dynamic of the functioning of the economy and the organization of work more generally. Preliminary findings suggest that, under the current mode of organization of production, service provision and work in the digital platform economy, the existing patterns of informality are reproduced, including the corresponding irregularity and instability of work that have characterized the prevailing pattern of growth in Mozambique.

The future of workers in the digital era, it is argued, depends upon the broader organization of the socioeconomic structures and relations which shape the nature of work, organically integrated into processes of capital accumulation on a global scale. Our findings highlight that Mozambique's productive structures have been unable to generate decent work. It has been found that, although digitally mediated work is a somewhat novel dynamic needing to be better investigated in the context of Mozambique, it should be understood as part of a global concern related to the nature of work and the structure of labour markets in Mozambique. So, digitally mediated work cuts across various spheres in labour markets and the economy more generally.

There have been some important challenges, and the need to reflect on policy options to better address them. One challenge is the need to conceptualize gig work in the context of the Mozambican economy and its dominant structures, especially the structure of the labour market. Another challenge is how we investigate this dynamic in a context in which systematic data on different types of gig workers is nearly inexistent. Moreover, collective organisation is critical. Last,

but not least, is the need to reflect on the policy options for regulating the digital economy and its associated dynamics. These should be informed by a clear understanding of the dynamics at work, which only in-depth research could provide. This research on digitally mediated forms of work is just a starting point. The findings have suggested the need to go through setting such regulation, as new expressions of work and tensions over labour relations have been emerging. The regulatory setting has to consider labour organisation and relations as well as the social conditions of work broadly created, reshaped or reproduced.

Notes

[1] The share of digitally deliverable service exports within global service exports has increased from US$1.2 trillion in 2005 to US$2.9 trillion in 2018, and global ICT service exports have increased from US$175 billion to US$568 billion in the same period, and global employment in the ICT sector has increased from 34 million to 39 million between 2010 and 2015 (UNCTAD, 2019).

[2] Notwithstanding the recognized methodological gaps in the indicators for measuring inequalities in official statistics.

[3] Due to the Covid-19 pandemic, negotiations for new minimum wages for 2020 were suspended and minimum wages continue at their 2019 level. Until 2000, there was a single minimum wage. From 2001 to 2007, two groups of minimum wages were established: agricultural and non-agricultural minimum wages. Since 2008, Mozambique has had multiple minimum wages, corresponding to the various sectors of the economy (see Hanlon, 2010).

[4] Mcel was the first mobile operator to be established in Mozambique. See http://superbrands.co.mz/wp-content/uploads/2018/07/sbmz01_mcel-1.pdf (accessed 10 November 2020)

[5] Hootsuite is a leader in social media management (see https://hootsuite.com/) and We are Social is a socially-led creative agency, with a global team of about 850 people spread across 13 countries, whose purpose is to connect people and brands in meaningful ways (see https://wearesocial.com/).

[6] https://www.slideshare.net/DataReportal/digital-2019-mozambique-january-2019-v01 (accessed 26 October 2020)

[7] In a more informal setting, the proliferation of WhatsApp users advertising a wide range of products, especially electronics and clothes, but also food and other services, has become an important dynamic. Although these are not normally integrated 'platforms' with a particular payment system, people who demand such services or products have at least three payment methods, namely Mpesa, a bank transfer to the seller's account or even payment in cash. These methods of payment are also used by platforms working with delivery. Many of these informal WhatsApp advertisements may reflect dynamics of work and value that may have emerged over the past years, although it is difficult to identify them without any systematic research. This particular, and informal (or formal in some cases), dynamic of work mediated somewhat digitally has become common. It is worth mentioning that most people using this means to advertise products target people amongst their contacts through their WhatsApp statuses. Some are doing their own informal business and others are even doing work for another person or company owning the products or services.

[8] With the portal https://www.deliva.africa/.

[9] But they also deliver for breakfast from 7:30am, Monday to Friday, and from 9am on Saturdays, in their most central areas.

[10] USSD shortcode *777#

[11] In some cases, the interview phone call established by the co-author of the working paper was reported as the first call received.

[12] Or through a friend or (ex)colleague who has been registered in the platform.

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