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TRANSFORMATIVE IMPACT: YOUTH IN SOUTH AFRICA'S GBS AND DIGITAL SECTORS

DECEMBER 2025



**Business Process
Enabling
South Africa**

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Approximately nine million young South Africans are Not in Education, Employment, or Training (NEET). Annually, **one million people** enter the labour market; 400 000 of them are expected to find relatively stable employment, whilst another 300 000 will work infrequently. The rest, amounting to 300 000 people, will likely never work. A lack of prior work experience is a significant barrier to employment. The experience “dividend” reveals that **youth with experience are four times more likely to transition into employment than those without.** The principle of “work begetting work” underscores the importance of gaining that crucial first job. According to **Harambee’s Income Survey**, remaining employed for a year doubles a young person’s likelihood of having a job one year later, compared to someone who

worked for only 30 days. **The Global Business Services (GBS) and Digital sectors serve as critical “on-ramps” to the formal economy for historically excluded youth.** Recognised as “sunrise sectors” with strong potential for inclusive job creation, they provide access to aspirational, stable, and higher-paying employment that can be transformative for young people’s lives. Young people account for 91% of supported jobs and 92% of new hires, and women hold 69% of the sector’s roles. This paper examines how the GBS and Digital sectors serve as engines of socio-economic transformation, delivering tangible benefits to youth, communities, employers and the South African economy.

THE GBS AND DIGITAL SECTORS AS A TRANSFORMATIVE CAREER OPPORTUNITY

The GBS and Digital sectors provide a stable and competitive income to youth who have historically been excluded from the formal labour market. An entry-level GBS or Digital job can notably improve a young person’s livelihood, because these roles are well-remunerated compared to similar roles in other sectors. The average monthly minimum wage in South Africa is R4,737 for a 38-hour week or R5,609 for a 45-hour week. In contrast, as shown in Table 1, the average

entry-level monthly salary across GBS/BPO roles is R7,500, illustrating that the average GBS/BPO entry-level salary is 45% higher than the average minimum wage in South Africa. Fikile Faku¹, who found work in the GBS sector after being unemployed for 9 years, noted that having a stable job **“changed my life because I’m able to do things. I’m able to open an account...[because] now I have a pay slip. I’m able to provide.”**



Table 1: Entry-Level GBS/Digital Salary Ranges (Monthly ZAR)

Firm type	Role	Entry Level Monthly Salary Range (ZAR)
Contact Centre (Outsourced)	Inbound Sales Agent	R5,162 – R7,000
	Outbound Sales Agent	R5,383 – R7,300
	Inbound/Outbound Customer Service	R5,825 – R7,900
	Debt Recovery Agent	R5,900 – R8,200
	Quality Assurance/Coach	R8,100 – R11,750
Back Office (Outsourced)	Back Office Processing Agent	R5,678 – R7,700
	Claims/Administration Processing Agent	R5,980 – R9,000
Digital and ITO (Outsourced)	IT Help Desk Agent	R6,757 – R11,200
	Technical Support Specialist	R7,508 – R11,600
	Data Analyst	R13,535 – R25,500
	Software Developer/Programmer	R20,197 – R31,700

Source: South Africa National GBS/Business Process Outsourcing (BPO) Salary Survey (2024)

¹ Note: This is a pseudonym to protect the participant’s anonymity.



This income uplift also drives shifts in financial behaviour and maturity. **The Global Findex 2025** indicates that employed individuals have higher financial inclusion, which is the access to and utilisation of financial products and services. This includes mature financial behaviours such as saving and borrowing, which are also illustrations of mature financial behaviours. Access to a steady wage enables youth to participate in the formal financial system through bank accounts, savings products, and credit. **Employment in the GBS and Digital sectors acts as a catalyst for this financial maturity.** This was validated by Mpho Mokoena², a young woman working in a Johannesburg contact center, who expressed how her increased income from working in the sector has enabled her to save, something she could not do in her previous lower-paying roles in other sectors. This progression is especially important in South Africa, where household saving rates are in the negative (**-1.2% in the first quarter of 2025**), meaning that instead of saving, households are borrowing or using their past savings to cover their expenses, and indebtedness is widespread.

Young people who begin their careers in the GBS sector are more likely to build sustainable careers in the formal economy than those who start elsewhere. This provides a powerful counterpoint to the “zig-zag” nature of South Africa’s youth labour market, where many young people move in and out of temporary or informal work without long-term stability. Data from Harambee’s SA Youth platform—a digital platform managed by Harambee that connects young South Africans to work and learning opportunities—suggests that GBS work acts as a strong anchor in the formal economy for young people. The data shows that 78% of youth whose first job was in the GBS sector moved on to another formal job, compared to only 62% of those who began in other formal sector roles. Of those who started in the GBS sector, half transitioned to jobs in other formal sectors (non-GBS), while 28% secured a second role within the GBS sector. **According to a study by the World Bank**, sustained participation in formal employment also drives earnings growth and stability: youth who remain employed for 12 months see an average real earnings increase of R680 per month, with an additional R520

per month if they stay in the same job for over two years. A study by **Sumberg et al. (2019)**, which reviews labour market surveys across Sub-Saharan Africa, found that formal private sector experience is more strongly associated with long-term employment stability than informal or self-employment. This concurs with Harambee’s research indicating that, in South Africa, individuals with formal sector experience are 1.7 times more likely to stay employed than those in public employment or self-employment. Together, these findings highlight the importance of a first job in the formal sector and underscore the value of GBS and Digital sector roles in helping young people access stable, income-generating careers.

Formal sector jobs in the GBS and Digital sectors offer structured career pathways, consistent skill development, and the opportunity for sustained advancement. The sector is a stabilising force for young workers, fostering greater job “stickiness” and long-term growth. South Africa’s **Quarterly Labour Force Survey (QLFS)** details how, of the 6 million young people ‘currently working’;

a substantial 4 million are moving in and out of employment in the short to medium term. Of the 3.8 million youth registered on the SA Youth platform, only 10–15% remain in stable, sustained employment, while 30–40% cycle in and out of work across Public Employment Programmes (PEPs), the private sector, and short-term income opportunities. In contrast, the GBS and Digital sectors provide accessible entry points into the formal labour market—an entry that is proven to drive long-term employment and income gains for young people.

The GBS and Digital sectors also offer opportunities for substantial career and wage progression. On average, GBS employees experience wage increases of around 43% as they progress from entry-level to mid- and senior-level positions. This wage progression demonstrates the career and economic mobility potential within the sector. This is consistent with trends seen globally in the GBS and Digital sectors. For example, **research** on BPO incomes in India suggests that employees benefit from income increases ranging between 40% and 200%, reflecting patterns similarly observed in South Africa. This progression not only enhances financial security, as outlined above. It also builds professional identity and resilience, reinforcing the GBS and Digital sector’s role as a launchpad for meaningful and lasting careers. Inga Ishmael’s³ anecdote highlights the potential for rapid progression in the sector: **“After only a few weeks in Customer Service, I was told that my performance was exceptional and that I was being promoted to [another] team. It was a huge moment for me because it proved that my hard work was paying off and I was making a difference. I worked in [this new team] for about a month, and then a new opportunity opened in [another team, which offered career growth]. All of this happened within just three months of joining [the digital organisation].”** Similarly, Unathi Ungcobo⁴ detailed her progression as

² Note: This is a pseudonym to protect the participant’s anonymity.

follows: *“My managers noticed my leadership potential, and I was given the chance to step into a bigger role. It feels incredible to move from graduate to leader so quickly. It shows that when you’re given the right preparation and opportunity, you can rise.”*

A shared sentiment among the sample of 11 young people, between the ages of 18 and 35, interviewed as part of this research paper reflected that securing a job in the GBS and Digital sectors marked a profound personal transformation—from prolonged unemployment and uncertainty to a renewed sense of agency, purpose, and stability. This career opportunity represented far more than just income; it provided validation of self-worth, enhanced confidence, and enabled practical milestones such as financial independence and improved living conditions. The young people described

their first formal roles in the sector as life-changing—helping them “rebuild” their belief in their abilities and talents, gain direction and discipline, and recognise their potential. Fikile Faku⁵, a young woman working in a contact center in Johannesburg, described her job as being deeply supportive and stated that working there has restored a sense of purpose, direction and self-confidence. Unathi Ungcobo, 20-year-old woman working in the GBS sector, felt that her permanent job gave her *“independence and stability to contribute to [her] family and start planning [her] own future with confidence”*. Entry-level GBS and Digital jobs are found to serve as powerful catalysts for youth agency and motivation, helping youth overcome personal barriers such as low self-esteem or fear of public speaking, enabling them to envision and actively shape their futures.

³ Note: This is a pseudonym to protect the participant’s anonymity.

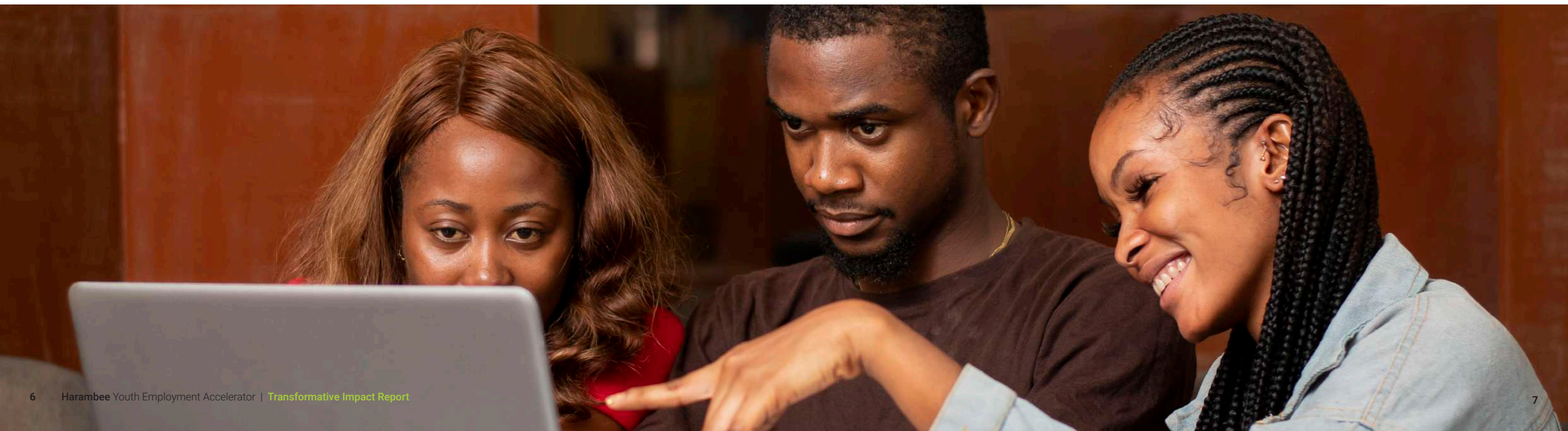
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GBS AND DIGITAL SECTOR JOBS SUPPORT FAMILIES AND INSPIRE COMMUNITIES

The work opportunities generated in South Africa’s GBS and Digital sectors create a transformative impact that extends far beyond individual employees, benefiting their families and communities. Research, interviews with **Concentrix SA**, a key employer in South Africa’s GBS sector, and engagements with young people working in the sectors for this study revealed that a single employed person in the sectors can support between three and ten dependents. Since 2010, the GBS sector in South Africa has created over 165,000 jobs. Based on the dependent range, this implies that the sector is supporting between 495,000 and 1,650,000 additional members of the population. The average number of work opportunities created in the GBS sector annually is approximately 18,315. If this growth continues as anticipated, the sector could support an additional 54,945 to 183,150 dependents each year.

A formal wage job through the GBS and Digital sectors can disproportionately alleviate poverty, for youth who come from grant-dependent households. In South Africa, **40% of households benefit from social grants.** Data from Harambee’s network of nearly 4 million youth shows that 61% of surveyed individuals come from grant-dependent households. For reference, a single caregiver qualifies for the Child Support Grant if they earn no more than R5,100 per month, and against this backdrop, the average GBS/BPO entry-level monthly salary of R7,500, offers a starting salary that can double the income of a typical grant-dependent household. This demonstrates how entry-level opportunities in the GBS sector not only provide employment but can meaningfully reduce household vulnerability and dependence on social grants.





Insights from the youth engaged through this research further highlight the tangible impact of these incomes; all of them dedicate between 30% to 70% of their income to supporting family and dependents.

Harambee's Income Survey (2023) along with several **other studies** detail how young people use their salaries, confirming that a large proportion goes towards essential needs, such as food, rent, and supporting dependents. Nelly Nene⁶, a young woman working in the GBS sector, explained that **"This job really played a huge role... Because, I do send money home. My mom, [is] currently not working at all...[yet] I'm able to buy food. I'm able to buy my son clothes and food"**. Similarly, Neo Nare⁷ shared that "I was also able to assist my dad. He was in hospital for a month...So, while he was still in the hospital, the money or the salary that I got from [the employer], it really helped, because I was able to pay off his debt once and for all."

In highly vulnerable, grant-dependent households, GBS and Digital jobs foster social inclusion and household stability.

Research highlights that, in low-income communities, employment fosters social

inclusion, dignity, and personal agency. Wage jobs help individuals feel valued and reduce feelings of exclusion, which are prevalent in areas marked by poverty and inequality. GBS employment injects stability, dignity, and agency into households historically trapped in cycles of vulnerability. By helping to lift entire family networks out of precarity, these jobs not only aid in alleviating immediate poverty but also lend a hand in interrupting the intergenerational cycle of poverty, positioning the GBS sector as a structural lever for inclusive economic transformation. Research from developing countries illustrates that for young people who have their own families, there is a positive relationship between household income and improved child wellbeing especially in areas such as school enrollment, regular attendance, and overall health. For young people in the GBS and Digital sectors who have children themselves, working in the sectors support increased household income and assets, which in turn supports their children's education, health, and overall development, helping to break cycles of poverty and promote long-term family stability.

⁶ Note: This is a pseudonym to protect the participant's anonymity.
⁷ Note: This is a pseudonym to protect the participant's anonymity.

A young person securing a formal GBS or Digital job often becomes a powerful role model within their community, shifting the aspirations of their peers, which in turn, influences their job-seeking behaviour. Many of the youth participants in this research recognise their impact, motivating their peers who aspire to follow in their professional footsteps and explore similar employment paths. Anele Abrahams⁸, a graduate of Harambee's Work-Integrated Learning programme and currently working in the GBS sector, mentioned that her community faces

high youth unemployment and **"seeing me wake up every day and just take a bath and dress up and go somewhere to try and make a living for myself; I would say it has inspired other people"**. She further stated that her work experience led to other people securing employment: **"I'll say three or four people have been able to get work opportunities because of my work experience...I have a friend who's currently at Harambee, who's also doing the same programme that I was doing, and I referred them to apply, and they were lucky enough to get it, too..."**

INCLUSIVE HIRING GENERATES STRONG RETURNS FOR GBS AND DIGITAL EMPLOYERS

The recruitment of diverse and inclusive talent pools, particularly previously unemployed youth, is increasingly viewed by employers in the GBS and Digital sectors as not merely a corporate social responsibility initiative but as a strategic business necessity. Interviews and partnerships with major employers in the GBS and Digital sectors in South Africa demonstrate that inclusive hiring, often termed "impact sourcing," delivers tangible commercial advantages and promotes sustainability. **Everest Group's** research confirmed this, noting that impact sourcing in emerging markets like South Africa can reduce delivery costs by up to 40% compared to traditional sourcing models. They also found that through impact sourcing, companies gain access to highly motivated, loyal workers from underserved communities, often with lower attrition rates (15-50% lower attrition) and higher productivity (especially

in customer service and data processing roles). Crucially, for companies tracking sustainable development metrics, impact sourcing directly supports Environmental, Social, and Governance (ESG) goals and the UN Sustainable Development Goals (SDGs), particularly around decent work and economic growth. Additionally, **inclusive hiring significantly shapes corporate reputation** by signaling a company's commitment to diversity, equity, and fairness, which can translate into long-term shareholder value.

Sutherland Global, a global business process outsourcing company with operations in South Africa, identified that achieving these gains from impact sourcing models requires targeted support to ensure youth are able to confidently deliver success. Engagements with Sutherland revealed a nuanced perspective on the outcomes of inclusive hiring. Sutherland South Africa currently

⁸ Note: This is a pseudonym to protect the participant's anonymity.

employs 468 people, with a workforce that is predominantly female (71%) and largely composed of young employees. Employees aged 18–28 representing more than half (55–60%) of their total workforce. Sutherland South Africa’s experience demonstrates that while impact sourcing has many benefits, youth need targeted support mechanisms to excel, such as the provision of transport, orientation on company culture, and access to social workers, life coaches, and psychologists. This experience demonstrates that reducing

absenteeism and attrition among inclusively hired employees requires proactive and sustained intervention. According to internal estimates, a new impact sourcing Sutherland employee typically takes four to five months to reach full competency (i.e., begin consistently meeting key performance indicators). While this period can be costly, investing approximately 30% of the employee’s cost in targeted support programs has generated measurable returns, reducing monthly attrition rates from around 5% to 2–3%.

An analysis of Stats SA data (2024) confirms that the typical monthly earnings of female employees in 2022 were R4,800, 25% lower than the typical monthly earnings of men, which were R6,000. By contrast, the GBS and Digital sector, particularly firms with inclusive hiring programmes, demonstrate a reversal of this typical pay gap at the entry level through equal pay policies. **As reported by BPESA**, in Q4 of 2024, 68% of the new jobs created were held by women, highlighting the sector’s role in promoting gender-inclusive employment. For example, Concentrix SA’s staff component is over 65% female, with over 70% of frontline advisors being women. Similarly, 71% of Sutherland’s staff component in South Africa is female. This focus on women, combined with equal pay policies, allows previously excluded young women to access formal employment through the GBS and Digital sectors, also enabling access to higher and more stable incomes than they would typically find in the broader labour market.

For many young people migrating from rural, townships and peri-urban areas to cities, the GBS sector offers one of the few accessible pathways to meaningful and better-paying employment. Even at the lower end of provincial pay scales, GBS jobs compare favourably to typical rural work opportunities. **Rural youth are nearly four times more likely to find their first job through a Public Employment Programme (PEP) than in the formal sector**, yet these programmes offer only modest earnings—ranging from about R1,472 per month for part-time work (16 hours per week) to around R4,000 for full-time roles. By contrast, even the lowest entry-level positions in the GBS and Digital sectors (as shown in Table 1) offer significantly higher and more stable incomes. This highlights how the sector enables rural youth who relocate to urban centres to transition from temporary, low-paying work into sustainable wage employment that can support long-term mobility and resilience.

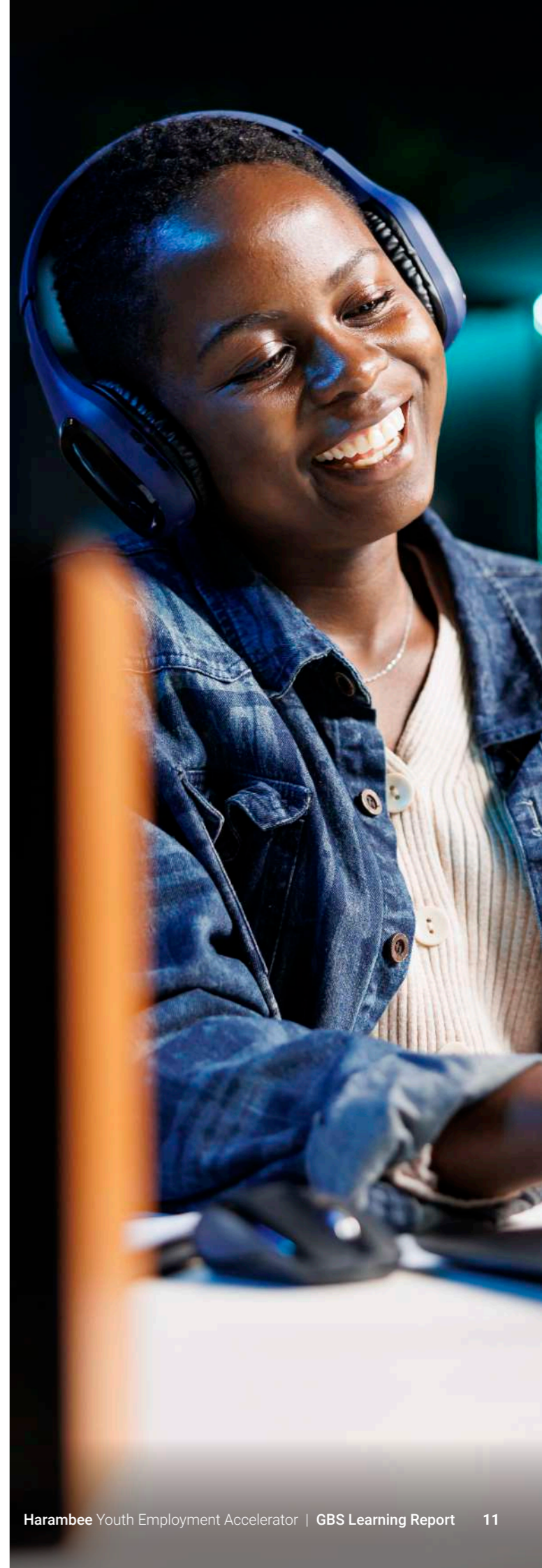
GBS AND DIGITAL SECTORS AS A CATALYST FOR TRANSFORMATION IN SOUTH AFRICA’S EMPLOYMENT LANDSCAPE

By prioritising youth, women, and historically excluded communities, the GBS and Digital sectors do more than provide direct employment—they act as a catalyst for economic transformation.

The GBS sector counters exclusion by bypassing traditional recruitment barriers, through impact sourcing initiatives, and investing in upskilling new hires to meet business needs. By aligning training with industry demand, the sector is transforming a demographic often perceived as lacking opportunity into a vital talent pipeline. Approximately **51% of South African youth without a matric certificate are unemployed**, 47.6% of youth who have completed matric are unemployed and 37.3% of youth who have tertiary training are unemployed. **Hiring biases** persist as individuals from the least-resourced

schools (quintile 1) are about five percentage points less likely to be employed than those from the most well-resourced schools (quintile 5). By providing structured training and formal employment opportunities, the GBS sector actively addresses these barriers, creating pathways for youth across all educational backgrounds to enter and progress in the formal economy. Data from the 2025 GBS Tracer Survey Demographics indicates that the majority of survey respondents placed into GBS opportunities held a Matric or lower qualification. Specifically, 72.9% of participants had educational qualifications at the Matric level or below.

In the broader South African labour market, women face persistent structural barriers and earn significantly less than men, despite often having higher educational attainment.



GBS AND DIGITAL HUBS AS ANCHORS OF LOCAL ECONOMIC GROWTH

The establishment of GBS and Digital jobs is widely recognised for generating subsequent waves of economic activity across supporting industries and communities. This converts a direct job opportunity into broad demand across the economy and broader value chain:

- **Indirect Impact:** As the GBS and Digital workforce expands, it requires a larger ecosystem of supporting service providers. This includes essential outsourced services such as transportation, security, catering, as well as technical support and infrastructure related to the technology needed for GBS or Digital centres.
- **Induced Impact:** As a consequence to increased in household income, there is a boost in demand for services essential to employees' personal lives, such as childcare and rental housing.

GBS and Digital hubs act as economic anchors, generating business opportunities for local goods and services. According to BPESA reports, and as confirmed by interviews with employers consulted through this research, the physical concentration of GBS and Digital operations—often housed in large centres that operate around the clock to serve global clients across time zones—creates a “mini city” within urban areas. These hubs generate their own local economies, with continuous demand for transport, security, cleaning, and catering services to support round-the-clock activity. In this way, the GBS sector not only provides direct employment but also stimulates a network of ancillary jobs and services. The consistent requirement for daily food services and facilities management

offers long-term contracts frequently won by local, emerging catering suppliers and SMMEs (Small, Medium, and Micro Enterprises) focused on facilities management. Frequent shift work acts as a measurable catalyst for the local logistics ecosystem, particularly benefiting the taxi industry and transport operators that serve workers on late-hour shifts—some of which are directly supported by transport services provided by GBS employers. This provides stable income streams to local transport SMMEs while improving the reliability of commuting options for GBS employees, especially those traveling from townships. Sutherland South Africa estimates that a 500-seater GBS operation spends close to R40 million annually on extended services such as transport, catering, guest accommodation, and build costs—most of which are procured from Level 1 B-BBEE contractors.⁹ These operational linkages support a broader ecosystem of local service providers and SMMEs. Together, these factors demonstrate that the GBS and Digital sectors not only create direct employment for young people but also significantly drives indirect and induced economic benefits within surrounding communities.

The South African government, through the Department of Trade, Industry and Competition (the dtic), has structured its GBS incentives to maximise indirect linkages and structurally embed local procurement. The dtic incentives, crucial for attracting and retaining foreign direct investment (FDI), explicitly leverages the sector's demand to drive value chain distribution within the domestic economy. **Expansion projects** that

meet specific criteria related to transformation (inclusion and empowerment of marginalised groups) and geographic spread can qualify for an additional 10% grant if they ensure that at least 70% of inputs, equipment, and machinery are locally manufactured or sourced.¹⁰ While GBS is a service-intensive rather than manufacturing-intensive sector, this high local procurement threshold is intended to compel operators to source high-value service inputs from local suppliers. This policy requirement effectively converts a fiscal incentive into a mandatory mechanism for value chain distribution. It ensures that FDI in GBS generates stable, catalytic growth for the formalisation and expansion of local service-providing SMEs.

A critical component of the indirect impact of the GBS and Digital sectors lie in the investment and subsequent positive externalities created by the demand for high-quality ICT. These sector-specific investments function as positive spillovers for the entire economy. The upgrades enhance overall digital reliability and capacity, which benefits non-GBS sectors and industries with ICT infrastructure bottlenecks. Furthermore, this demand for reliable and high-quality network accelerates digital inclusion in historically underserved areas. For example, provincial **support initiatives**, driven by the needs of GBS and BPO operators, have resulted in broadband coverage being extended to more than 50 townships in the Gauteng Province.

Salaries earned by youth in the GBS and Digital sectors drive local consumption and stimulate community-level economic activity. As noted above, many young people entering the sector—particularly through impact sourcing initiatives—come from low-income households and therefore spend most of their earnings on essential needs such as food, clothing, transport, and local services. Therefore income generated in the sector circulates rapidly within nearby communities, boosting local businesses and strengthening township economies. The induced impact of this spending is illustrated in a GBS center that was established in a township where agents earned around R12,000 per month and spent their salaries locally. It is reported that vendors in the area surrounding the GBS center experienced substantial business growth—reportedly increasing sales by five to six times—after the introduction of the new workforce, with some even approaching the office to offer gifts in appreciation.

This learning product demonstrates how employment opportunities in the GBS and Digital sectors, used as critical levers, generate significant social and economic impact. The lessons highlight the social return on investment of creating work opportunities for young people in the sectors, showing how these jobs provide essential work experience, stable income, and pathways for empowerment, inclusive growth, community upliftment, and enhanced business performance.

⁹ A Level 1 **Broad-Based Black Economic Empowerment (B-BBEE)** contractor is a top-rated black-owned or empowered business that meets strict standards for contributing to South Africa's economic transformation

¹⁰ Note: Projects that meet transformation and local sourcing requirements are eligible for an extra 10% on top of the standard dtic incentive grant, increasing the total grant amount rather than reimbursing a percentage of project costs.

I KEY LESSONS:

- **First jobs are critical:** Access to entry-level employment in the GBS and Digital sectors provide youth with work experience, dramatically increasing their likelihood of sustained employment.
- **Youth-focused and inclusive employment matters:** The sector predominantly hires young people and promotes gender inclusion, addressing the highest areas of unemployment and historically excluded groups in South Africa.
- **Stable income drives socio-economic uplift:** Entry-level GBS and Digital jobs pay above average wages, enabling youth to improve household income, reduce reliance on social grants, and support families and communities.
- **Career progression creates lasting economic mobility:** Employees experience substantial wage growth and professional advancement in the GBS and Digital sectors, reinforcing financial stability and building resilience, confidence, and agency.
- **Employment generates indirect and induced impacts:** Beyond individual benefits, the sector stimulates local economies through supporting services, rental housing, and broader community consumption.
- **Inclusive hiring delivers business benefits:** Impact sourcing, with the necessary employee support interventions in place, can enhance retention, attendance, and performance, while lowering recruitment and training costs, demonstrating that social inclusion and commercial success are aligned.
- **GBS and Digital hubs act as economic anchors:** Concentrated operations create localised demand, supporting small businesses, SMMEs, and township-based service providers, and catalysing digital infrastructure expansion.
- **The sector drives transformative outcomes:** GBS and Digital jobs not only provide income but also foster confidence, self-worth, and social influence, positioning youth as role models and shifting community aspirations.



