



Is the workforce ready for reinvention?

Asia Pacific Workforce Hopes and Fears Survey 2023

June 2023



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Introduction

Asia Pacific is known as an economic powerhouse. Home to both advanced and rapidly emerging economies, its growth rate has seen the region play a pivotal role in shaping the global economy. But how it has grown to date, is not how it will grow in the future.

As we identified in our 2022 report, [Asia Pacific's Time: Responding to the new reality](#), while the economy has rebounded from the pandemic lows, we continue to see financial, environmental and social pressures converge to create new and more complex challenges. Businesses in the region must reshape uncertainty into opportunity, complexity into clarity and problems into potential. Now, in our 2023 Asia Pacific Workforce Hopes and Fears survey, this need is amplified.

Our survey of 19,500 Asia Pacific employees – as part of the annual Global Workforce Hopes and Fears Survey – shows, for the first time, a striking similarity between employees and employers on the critical need to transform to survive. 39% of employees believe their company is unlikely to survive more than 10 years if they remain on their current path. This chimes with our [2023 Asia Pacific CEO Survey](#), with 53% of CEOs expressing the same concern.

What will this mean for the workforce? Change. Organisations will only succeed in their reinvention if their people are fully engaged, motivated and eager to contribute. So, are they ready for what lies ahead?

Our survey identifies six factors impacting their readiness to evolve. They are business viability, employee sentiment, workforce skills, emerging technology, work environment, and climate action.

The results show that there is work for employers to do. More so than their global peers, Asia Pacific employees are ready to test the employment market. In the next 12 months, almost a third are likely to change employer, an increase of 10% on last year. Just over two in five plan to ask for a pay raise from their current employer.

However, it also shows that there may be greater capacity within the existing workforce. Less than half (48%) of employees feel their employers provide them with opportunities where they can apply their skills effectively in the next five years. This could indicate that their individual skills are either not understood or not being used in the most effective way. The answer to the skill shortage may be hiding in plain sight.

Understanding the current workplace dynamics can help leaders energise their workforce, tap into the power of their people and accomplish bolder goals. The objective of this survey is to help organisations understand how the workforce is feeling about the present as well as their future. We also share several considerations to help leaders tailor their workforce strategy accordingly, to ensure their people are indeed reinvention ready. After all, the future of organisations depends on it.



A snapshot of key Asia Pacific findings

- 39% of the workforce believe that their organisation is unlikely to survive more than 10 years if they remain on their current path. Reinvention is key to business viability.
- Job satisfaction remains steady at 57%. Higher levels are seen in Thailand, Indonesia, the Philippines, Mainland China and India.
- Employees are still restless. There's a growing confidence to seek a promotion or pay raise — a 7-10% increase on 2022 results.
- 44% of employees believe that the skills required for their jobs will undergo significant changes within the next five years, however they lack clarity around exactly what will change.
- Human skills matter most, with adaptability/flexibility (69%), collaborative skills (67%) and critical thinking (66%) seen as more important than technical or core business skills.
- Skills are hiding in plain sight – less than half (48%) feel that their employers provide them with opportunities where they can apply their skills effectively in the next five years.
- Artificial Intelligence (AI) is seen to be mostly positive, with 41% saying it will increase productivity and efficiency at work, and 34% viewing it as an opportunity to learn new skills. 16% believe AI could replace their job.
- Employees don't feel safe to challenge the status-quo. Only around 30% of employees believe their managers tolerate small-scale failures or encourage dissent and debate.
- There is a lack of urgency for climate action. Only 41% of workers believe that their employers have a responsibility for addressing climate change, and 43% believe that their company is taking appropriate action.



What impacts employees' reinvention-readiness?

Business viability

Given the scope and speed of change being experienced everywhere, one thing is clear – transformation is key to the survival of organisations. According to employees, if employers remain on their current path, 39% are unlikely to survive more than 10 years.

And this is one topic where both employees and leaders share similar views. This is encouraging. Everyone needs to lean into the potential of reinvention to be equipped for what the future holds.

The employee perspective

Employees in the region are not overly positive about the future of their companies. Only 51% of employees believe that their employers will be in business for more than 10 years if they don't evolve, which is 8% lower than their global counterparts. Additionally, one in four employees holds the belief that their company will last less than six years, while one in ten have even less confidence, thinking their company will not survive for more than three years.

When looking at the regional breakdown, workers in Malaysia, India and Singapore are the least optimistic, believing that their employer will not survive more than a decade if they continue on their current path. On the other hand, employees in New Zealand, Taiwan, Indonesia and Australia have a more optimistic outlook.

Interestingly, results differ by generation. Gen Z employees, often considered digital natives, are more sceptical, with 52% believing their employers will not survive more than a decade if they don't transform. In comparison, only 31% of Gen X and 29% of Baby Boomers share this view, suggesting that younger employees recognise the need for reinvention and transformation to stay relevant in the future.

Furthermore, employees in managerial roles express a greater urgency for transformation compared to non-management roles, with 46% versus a third acknowledging the need for change.

The employer perspective

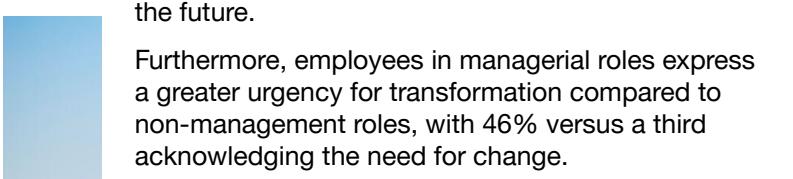
The same sentiment was reflected in the results from our [2023 Asia Pacific CEO Survey](#) where 53% of CEOs believed that their current business models will not survive in the next decade if they do not undergo transformation. This was 14% higher than global CEOs, highlighting the pressing need for leaders in the region to embrace reinvention.

At the territory level, the sense of urgency for reinvention was particularly strong among CEOs in South Korea with 79% acknowledging the need for transformation. This sentiment was also high among CEOs in Japan (72%), Mainland China (68%) and Hong Kong SAR (66%). These territories exhibited a heightened awareness among their leaders regarding the imperative to adapt and evolve their business models to ensure long-term survival and success.

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Heavily influenced by changing customer preferences and skills shortages, CEOs across Asia Pacific see a pressing need to transform their business model to remain relevant. Workers across the region – and in particular the newer generations in the workforce – are recognising that exact same need. This provides a powerful starting point for business leaders to involve employees in co-creating and co-facilitating the necessary organisation transformation.

Martijn Schouten, Partner, PwC Singapore





Employee sentiment

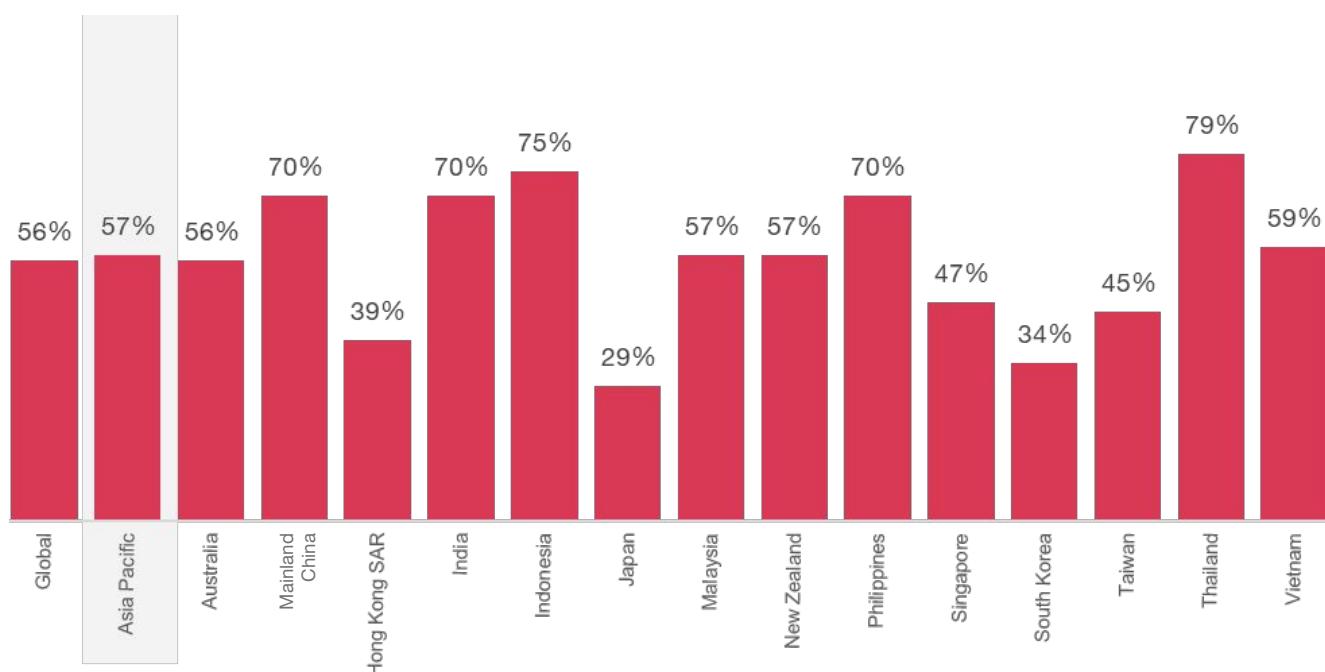
Employee sentiment is mixed across the region. Overall, while job satisfaction levels are generally steady, there is an increased willingness to seek better compensation or career opportunities, indicating growing confidence and evolving aspirations among the workforce in Asia Pacific.

Job satisfaction

Levels of job satisfaction have not changed significantly over the past year. The majority of employees, around 57%, express moderate to high satisfaction with their jobs, similar to the global average and consistent with the previous year's statistics. However, job satisfaction levels varied significantly across the region. Mature economies like Japan, South Korea, Hong Kong SAR and Taiwan reported lower levels of job satisfaction, with percentages ranging from 29% to 45%. On the other hand, employees in Thailand, Indonesia, the Philippines, Mainland China and India display higher levels of job satisfaction, with percentages ranging from 70% to 79%. Baby Boomers, those in management, or roles in Technology, Media, or Telecommunications, and working in larger organisations are associated with higher job satisfaction.

Job satisfaction differs greatly across Asia Pacific

Q. How satisfied are you with your job(s)?



Note: Showing only "very satisfied" and "moderately satisfied" responses
Base: Asia Pacific respondents (19,502)



Promotion or pay raise

Roughly 40% of employees express that they are extremely or highly likely to ask for a pay raise or promotion in the next 12 months. Additionally, about 30% of employees state that they would likely change employers within the same timeframe. These figures represent a 7-10% increase compared to the previous year's survey, indicating an increased confidence among employees to seek better compensation or career opportunities. The younger generation (Gen Z and Millennials), employees at senior levels, and those working in larger organisations are more inclined to ask for a pay raise, seek promotion, or consider changing employers, driven by factors such as seeking new experiences and new skills, or looking for opportunities to make a more direct contribution.

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Talent shortages, cost of living and pressure to retain talent continue to put upward pressure on pay levels with no sign of this diminishing. Organisations will not be able to meet pay expectations for everyone, so must consider other elements of non-financial reward to make up the difference.

Andrew Curcio, Asia Pacific Rewards & Benefits, Partner, PwC Australia

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For organisations to successfully change and reinvent, they need to create an environment where their people feel safe to express new ideas, challenge traditional thinking and potentially make mistakes.

Elizabeth Shaw, Partner, PwC Australia

Inclusion and belonging

Only half of the workers feel comfortable being themselves at work, which is similar to the 2022 results. This suggests there's room for employers to enhance their efforts in cultivating an inclusive workplace culture that celebrates diversity and improves belonging and acceptance among workers.

Creating a work environment that fosters a sense of belonging is critical to retaining talent, productivity and performance, and has a significant impact on people's wellbeing. It is in everyone's best interests.

Workforce skills

Employees are aware of the need for continuous learning, however they lack clarity around exactly how their skills need to evolve in the future. They rate people skills as most important and believe their employers will support their upskilling. On the other hand, there is a significant portion of the workforce that feels under-utilised, suggesting a potential for employers to optimise their existing workforce by understanding individual aspirations, providing relevant opportunities, and empowering employees.

Evolving skills

44% of employees believe that the skills required for their jobs will significantly change within the next five years. However, only 48% of employees said they clearly understand how their skills will need to evolve. Employees whose jobs necessitate technical or specialised training are more ready for reinvention — they are almost four times more likely to agree that their jobs will change in the next five years, and four times more likely to have a clear sense of how.

When it comes to awareness of changing skill requirements, senior executives seem more attuned, with 59% believing that the skills needed for their jobs will significantly change in the next five years. In comparison, only 34% of non-managers share the same sentiment. Younger employees, specifically Millennials (48%) and Gen Z (43%), are more aware of the changing skill landscape.

While employees express confidence in their employers' ability to provide them with tools and resources to enhance their skills, less than half of them (48%) feel assured that their employers provide them with opportunities to apply their skills effectively in the next five years. This issue is particularly pronounced in Japan, South Korea and Hong Kong SAR, where a significant majority of employees feel under-utilised. It suggests that employers could unlock greater capabilities from their existing workforce by better understanding individual aspirations, providing relevant opportunities, and empowering them.

Lastly, management roles and jobs requiring specialised training are more likely to offer opportunities for applying important skills that contribute to career growth. Senior executives have the highest likelihood (67%) of accessing such opportunities, followed by managers, while non-managers have the lowest likelihood.

“

Employees in India are about 20% more positive than global counterparts when it comes to actively seeking out opportunities to learn and bring innovative ideas to their teams, however, Gen Z has a significantly less favourable outlook compared to other generations. This prompts the question: how can employers reimagine and contemporise ways of engaging a multigenerational workforce?

Kartik Rishi, Partner, PwC India





People skills

Human skills matter most in the modern workplace, similar to global findings. Employees rank people skills such as adaptability/flexibility (69%), collaborative skills (67%), and critical thinking (66%), above technical or core business skills. Furthermore, employees in the region generally believe that their employers will support their upskilling efforts.

Green skills, which encompass various aspects of sustainability and environmental impact, are regarded as least important. This sentiment is consistent in both Asia Pacific and worldwide.

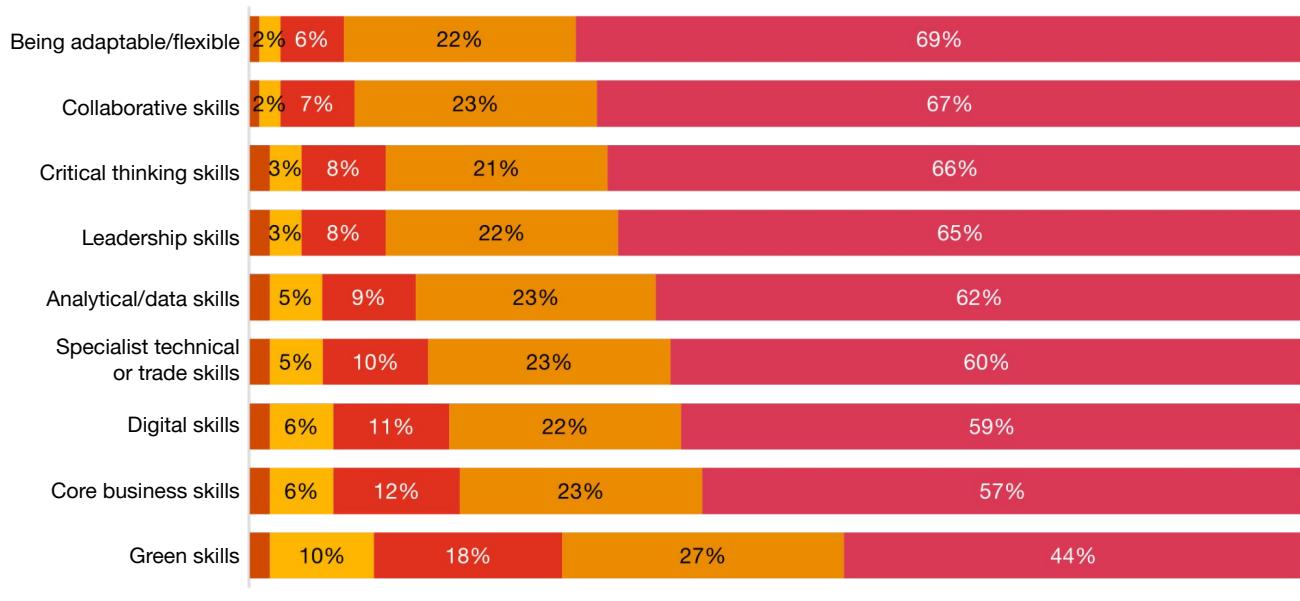
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Upskilling continues to be a major issue in China for both employers and employees. Traditionally, the capability framework was based on the organisation design and roles required, however more and more, we're seeing skills linked to tasks and activities rather than roles. Project-based organisations are becoming more common, and skills are not easily transferred from a project team to ongoing roles. This is also causing a misalignment between the business needs and what is offered via Learning and Development.

Johnny Yu, Partner, PwC China

Human skills matter most in the modern workplace

Q. How important will the following skills be to your career in the next five years?



■ Don't know ■ Not at all important ■ Slightly important ■ Moderately important ■ Net: Important (Extremely + Very important)

Note: Percentages shown may not total 100 due to rounding
Base: Asia Pacific respondents (19,502)

Emerging technology

Asia Pacific employees are optimistic about the impact of Artificial Intelligence (AI) on their jobs. They are also confident that their employers will support their upskilling of digital skills, which aligns with the [2023 Asia Pacific CEO Survey](#) where 67% of CEOs are investing in deploying technology, including cloud, AI and other advanced tech.

Artificial intelligence

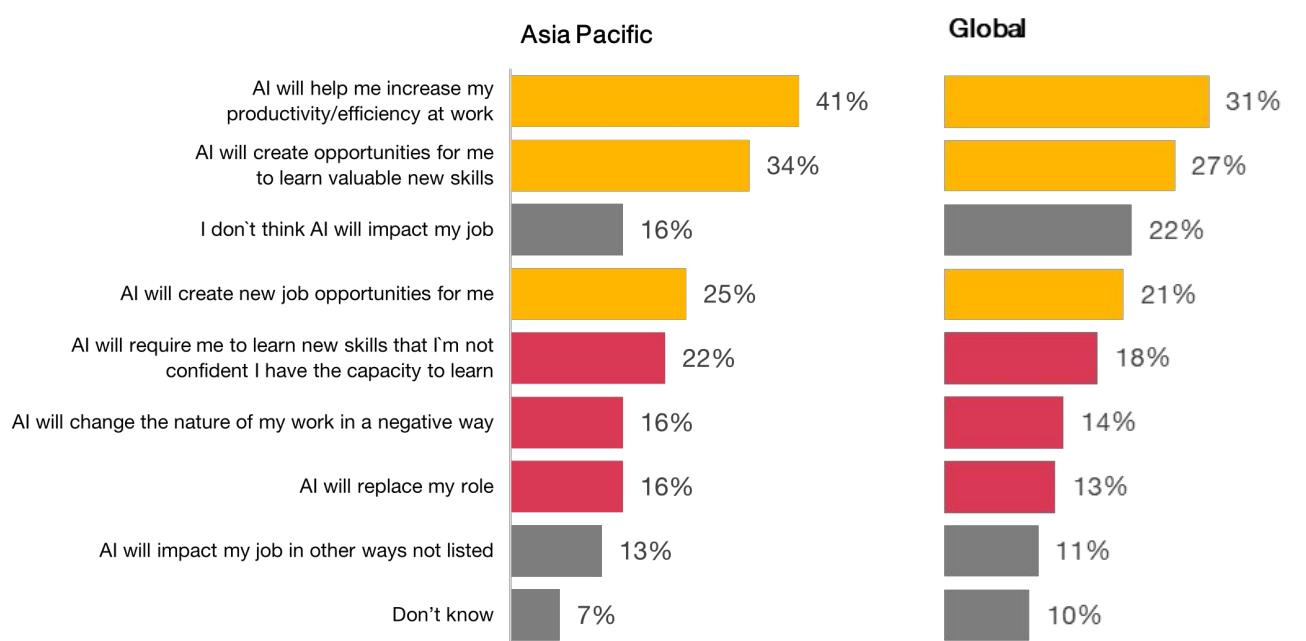
Asia Pacific employees are more bullish about AI than their global counterparts. They foresee AI having mostly positive impacts on their jobs with 41% saying that AI will increase productivity and efficiency at work, and 34% viewing it as an opportunity to learn new skills. However, 22% lack confidence in their ability to acquire new AI-related skills.

16% of respondents believe that AI will replace their roles and an equal percentage feel that AI will have no impact. Workers in Vietnam, Indonesia and India are more likely to view AI as an opportunity to learn new skills, while those in New Zealand, Australia and Japan are less concerned about the impact of AI on their jobs.

Industries such as Technology, Media and Telecommunications, as well as Financial Services, see the greatest potential for improved productivity through AI. In contrast, employees in Health and Government and the Public Sector express the most confidence that AI will not replace their roles.

Asia Pacific employees reacted more positively to AI compared to their global counterparts

Q. What impact, if any, do you expect AI to have on your career in the next five years?



Base: Asia Pacific respondents (19,502)

Positive

Neutral

Negative



Digital skills

The importance placed on digital skills varies across the region. While 58% across the region consider digital skills important to their career, only 25% in Japan and 44% in New Zealand share the same sentiment. Younger generations, such as Gen Z and Millennials, place higher importance on digital skills compared to older generations. Senior executives and managers are more likely to see the importance of digital skills for their careers in the next five years compared to non-managers.

Overall, a majority of employees, 59%, express confidence that their employers will support their upskilling efforts in digital skills.

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The challenge for leadership is cutting through the hype to identify and really understand the most potent cases for generative AI for your business that can be scaled, and then harnessing the immense excitement and momentum in our workforces, with appropriate governance.

Charmaine Chalmers, Partner, PwC Australia

Work environment

The work environment exhibits a mixed sentiment among employees. Overall, the statistics suggest that improvements are needed in several areas of employees' work environment, including fostering an innovative culture, promoting feedback exchanges, enhancing inclusion, managing workloads effectively, and building trust in management.

Multiple employers

Employees are increasingly feeling cash-strapped as the economy continues to impact workforce wallets.

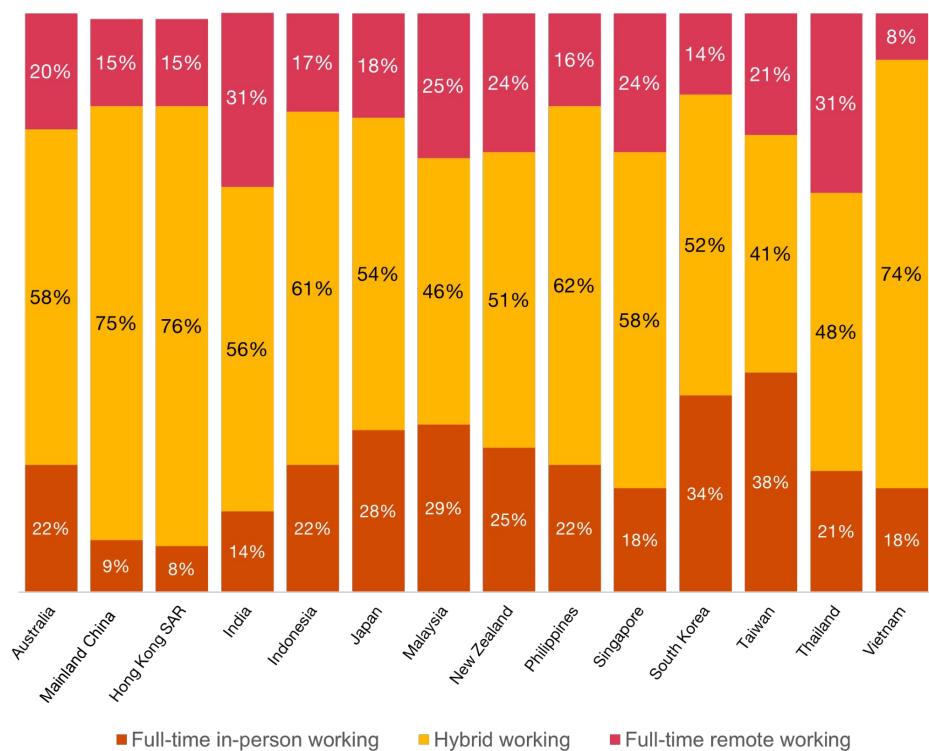
While 76% of workers have one job, one in four juggle two or more positions, with significant variations across territories. This is higher than the global result, where one in five workers have multiple jobs. Territories such as Vietnam, Thailand and Malaysia have a higher prevalence of multiple jobholders. In contrast, Japan and Mainland China predominantly have single-job workers.

Work location

Hybrid work is here to stay. Among those respondents with job that could be done remotely or at home, 59% work in a hybrid arrangement, with the rest evenly distributed across full-time in-person and remote working. However, this ratio varies across territories. Hybrid working appears to be more dominant in Mainland China and Hong Kong SAR, and less common in Taiwan, Malaysia and Thailand. Generally, those in management roles are more likely to work in a hybrid fashion at 62% vs non-managerial roles at 50%.

Hybrid work is here to stay

Q. Regarding your current role, how are you currently working?



Note: Percentages shown may not total 100 due to rounding
Base: Asia Pacific respondents (19,502)

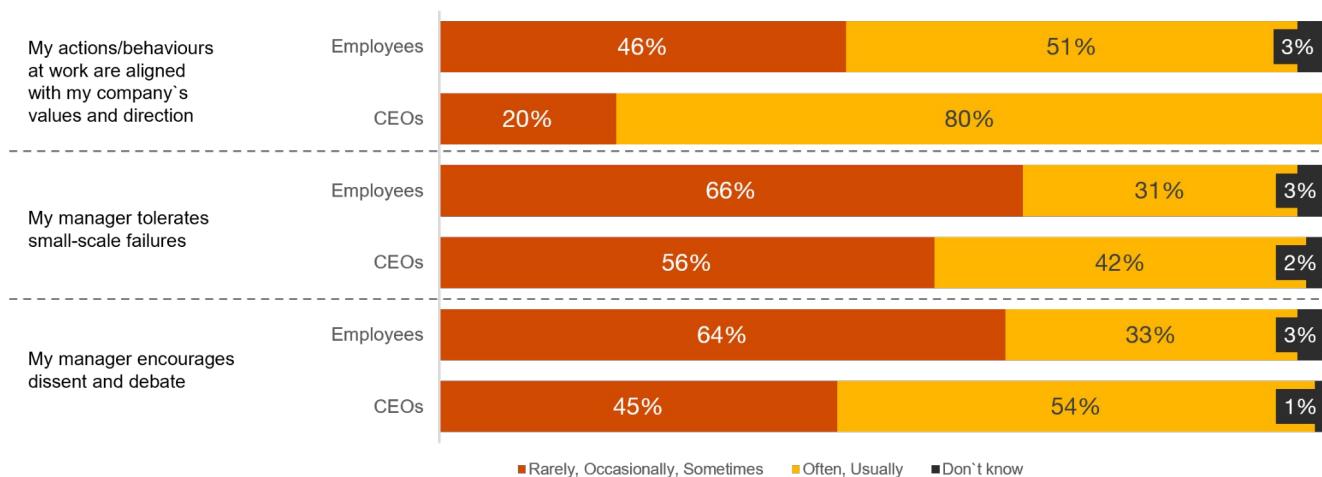


Culture

Cultural aspects play a crucial role in the workplace. Unfortunately, few managers foster a culture that embraces failure, creativity and experimentation. Only about 30% of employees believe their managers tolerate small-scale failures or encourage dissent and debate. Interestingly, there's a misalignment with CEOs with half thinking small-scale failures are tolerated and debates are encouraged.

There is a disconnect between Asia Pacific CEOs and employees when it comes to company culture

Q. For the following statement, please indicate how frequently it occurs in your company



Note: Base for 'employees': all Asia Pacific respondents from PwC's Asia Pacific Workforce Hopes and Fears Survey 2023, excluding Government and Public Sector (18,514). Base for 'CEOs': all Asia Pacific respondents from PwC's 26th Annual Global CEO Survey (1,634). The question wording was slightly modified for CEOs vs employees. Percentages shown may not total to 100 due to rounding.

There is also a significant degree of disconnect between employees and their employers when it comes to values. Just over half (51%) feel aligned with their company's values, but this sentiment varies widely across territories. Workers in the Philippines, New Zealand, Australia and Indonesia exhibit stronger alignment, whereas those in Japan, South Korea, Hong Kong SAR and Mainland China have weaker connections. The story is different for CEOs however, with 80% believing their employees are aligned with company values and directions.

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Half of employees in Asia Pacific feel a disconnect with their company's values. This indicates a culture challenge for employers. Leaders should consider conducting a culture assessment to gain meaningful insights and plan for a refreshed approach.

Debra Ovinis, Partner, PwC Malaysia

Feedback

This essential element, for a culture of transformation, is uncommon in Asia Pacific. Only one in two employees actively seek feedback and provide constructive feedback to their coworkers. Older employees, such as Gen X and Baby Boomers, are less likely to engage in feedback exchanges compared to younger generations. However, senior management demonstrates a higher propensity for seeking and providing feedback compared to non-managers.

Leadership

Fairness and equity are critical expectations from management. As often quoted, ‘people don’t leave bad jobs, they leave bad managers’. While half of employees believe their managers treat them fairly and equitably, this sentiment varies widely across territories. Thailand, India, Indonesia and the Philippines have a more positive perception of managerial treatment, while Japan, South Korea, Hong Kong SAR and Taiwan are least positive. Gen Z and Millennials tend to have slightly more positive perceptions of their relationship with managers compared to Gen X and Baby Boomers.





Climate action

Identified as one of the [five global megatrends](#) increasingly impacting all aspects of our lives, climate change is considered an urgent crisis on the transformation agenda. Surprisingly, there is no strong sense of urgency among employees to push their employers to take greater action.

Responsibility

Only 41% of Asia Pacific respondents believe that their employers are responsible for addressing climate change, slightly higher than the global average. India, Thailand and Vietnam have a higher percentage of employees who agree with this responsibility, while Singapore, Taiwan, South Korea and Japan have lower expectations.

In terms of company climate action, 43% of respondents believe that their company is taking the right amount of action. Thailand, Indonesia and Vietnam have higher proportions of employees who feel this way, whereas Japan and Taiwan have lower proportions. On the other hand, 15% of employees feel that their company is not taking sufficient action to address climate change, with Japan, South Korea and Taiwan having higher percentages.

Compared with the [2023 Asia Pacific CEO Survey](#), climate risk is ranked by CEOs as the second least important risk in the next 12 months (17%), with investment into climate change measures in the coming 12 months their lowest priority. However, its importance is expected to increase over the next five years to 27%, implying that CEOs acknowledge the importance of climate risks in the medium term but not the short term.



Responses on climate action differ greatly across Asia Pacific

Q. To what extent do you agree or disagree that your employer has a responsibility to take action to address climate change?



Note: Percentages shown may not total 100 due to rounding

Base: Asia Pacific respondents (19,502)

Skills required to act

Interestingly, green skills, which encompass various aspects of sustainability and environmental impact, are ranked as the least important skills for employees' careers in the next five years. However, 50% of employees express confidence that their employers will support them in developing these skills.

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The surprisingly low ranking of the importance of green skills could indicate that greater awareness is needed around the sustainability impacts facing all countries and industries, and the resultant changes in jobs and skills. Employees need to see themselves as part of the solution. They should actively seek upskilling opportunities to drive this transformation and continue to stay relevant in a rapidly evolving operating context.

Parul Munshi, Partner, PwC Singapore



What can employers do
to ensure their workforce
is reinvention-ready?

Eight considerations for leaders

Bring people along on the journey. Transformation is complex, especially in an environment where businesses are tackling short-term crises while trying to transform for long-term sustainable outcomes. This generates complexity and anxiety, requiring both leaders and employees to get comfortable with ambiguity and become more resilient to constant change. The fact that workers recognise the need for transformation is a perfect starting point to put people at the heart of that transformation.

Lean into Artificial Intelligence (AI). It is time for leaders to identify the most valuable cases for generative AI that can be scaled and harness the immense excitement in the workforce. Businesses should leverage this momentum and lean into the opportunity that technology provides to enhance productivity, while really understanding the transferable skills required to augment technology. Given the speed of change in this area, leaning into the potential of AI is a priority to optimise productivity and efficiency.

Consider what it requires to be a Skills Based Organisation.

Our Hopes and Fears results confirm that applying a skills-based view to organisations has never been more urgent. Everyone should be able to live, learn, work and participate in a world that's constantly being disrupted. Roles are evolving and talent shortages have hit a 16-year high*, with 75% of employers struggling to find talent with the right combination of skills. It is imperative for employers to dynamically identify the skills and talent required to achieve their transformation needs.



The persistent and widening skill gap in the region demands urgent action. Forward-thinking companies must make skills the focal point of their talent strategies, from recruitment, training, development to benefits and compensation. This strategic shift not only addresses the burning issue of talent attraction and retention but also prepares organisations for the demands of tomorrow's jobs.

Norah Seddon, PwC Asia Pacific Workforce Leader

* LinkedIn Data Insights Blog – The Most In-Demand Skills for 2023



Discover untapped skills hiding in plain sight.

There is a latent reserve of skills in the existing workforce with many employees feeling that they're not given the opportunity to apply their skills. Employers should take the time to discover what their existing employees would like to do, to unlock greater capability, provide career pathways and improve staff retention.

Create a culture of experimentation, creativity and a willingness to accept small-scale failures. Employees will feel safe and supported enough to step outside of the status quo. Employers need to encourage new ideas that challenge conventional thinking in order to reinvent for the future.

Ensure that promotion decisions adequately consider 'soft skills' and a proactive approach to diversity and inclusion. Employees with the ability to be flexible, adapt, collaborate and apply critical thinking are most likely to thrive in a fast-changing work environment. Building a psychologically safe, inclusive workplace enables employees to bring their best selves to work and underpins an innovative, dynamic organisation.

Invest in building transformative leadership capability. A new style of leadership is needed to steer the organisation on a path of reinvention in a people-centred way. Undertake an analysis of your leaders' skills and capabilities to determine their potential, create a talent pipeline and invest in a future-fit development program.

Involve employees in climate change solutions. Leaders are more aware of the strategic impacts of climate change than non-managerial grades of employees. This indicates that leaders need to bring their workforce along on the journey, drive greater awareness of the impacts and involve them in delivering relevant solutions. Everyone, everywhere, is responsible for climate change and should feel a sense of urgency to act.

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Talking about my generation: Snapshot of employees' differences

Millennials are largely positive about their opportunities and in their behaviours, while Gen X are the opposite. Gen Z are the most likely to make changes in their job while Baby Boomers are more resistant to change.

Gen Z (ages 18-26)

- Most likely to ask for raise (51%) and promotion (49%) and change employer (35%) in next 12 months
- 25% Gen Z have a second job
- Most likely to work full-time remotely (29%)
- Most likely to believe that their employers won't survive within the next decade if they continue their current path (52%)
- Least likely to agree that their employers have a responsibility to take action to address climate change (36%)

Millennials (ages 27-42)

- Most likely to work hybrid (62%)
- Most likely to agree that the skills their job requires will change significantly in the next five years (48%) and have a clear sense of how (52%)
- Most likely to seek out opportunities to learn new skills (62%)
- Most likely to seek feedback (58%)
- Most likely to provide constructive feedback to their co-workers (55%)
- Most proactive in solving problems (65%)
- Most likely to bring innovative ideas to their team (57%)
- Most positive about AI, the anticipated increase in productivity (46%) and opportunity to learn new skills (38%)

Gen X (ages 43-58)

- Least satisfied (52%) with their current jobs (Gen Z was the least satisfied group last year)
- Most likely to work full-time in-person (24%)
- Least likely to agree that they are fairly rewarded financially (41%)
- Least likely to believe that they can truly be themselves at work (46%)
- Have the least opportunities to apply the skills that are most important to their careers in the next five years (39%)

Baby Boomers (ages 59-77)

- Most satisfied (61%) with their current jobs
- One in four Baby Boomers are working part-time (24%)
- Least likely to seek out opportunities to learn new skills (47%)
- Least likely to seek feedback and use it to improve their performance (44%)
- Least likely to provide constructive feedback to help their co-workers (47%)
- Least likely to bring innovative ideas to their team (44%)

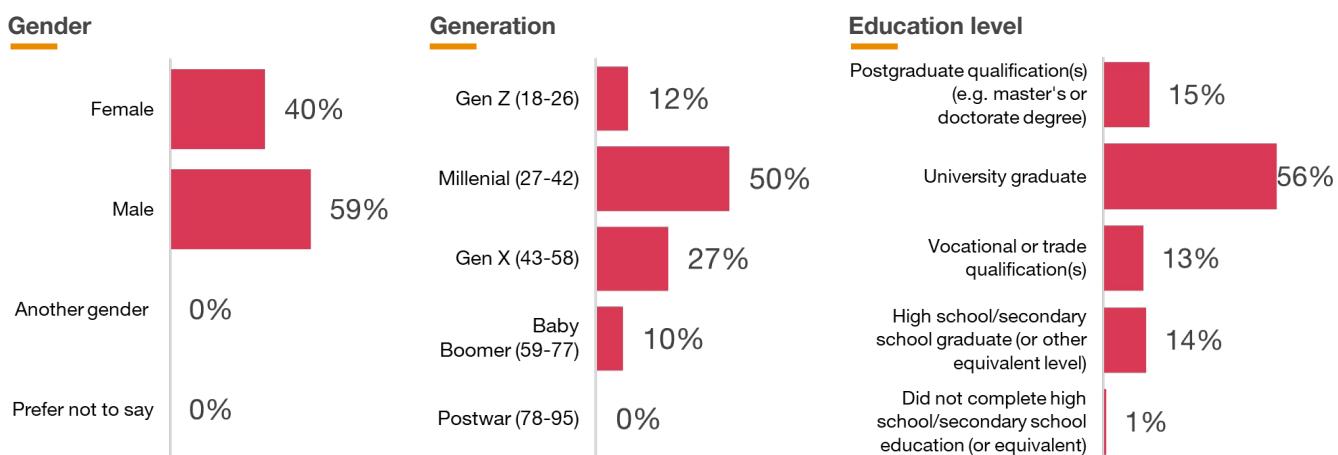
Demographics of respondents

19,502 total responses across Asia Pacific

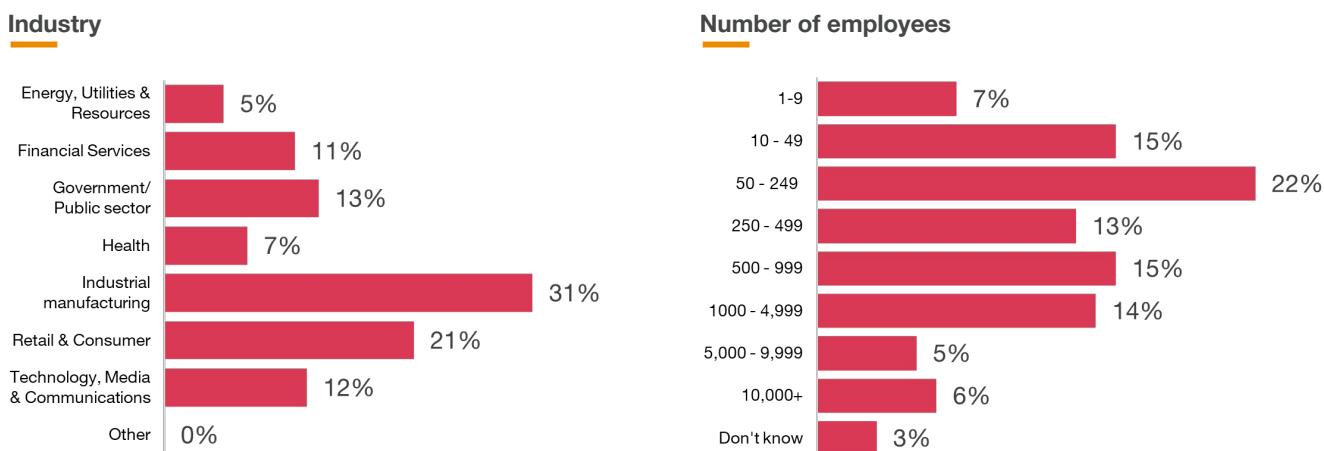
Geographic profile



Personal demographics

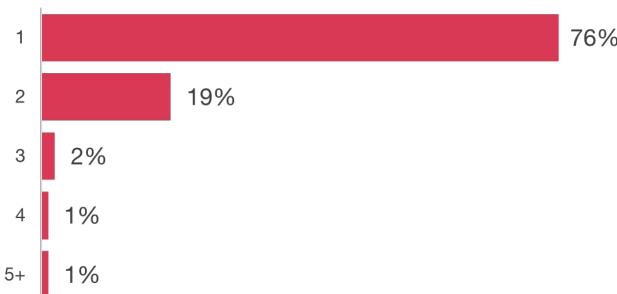


Job demographics

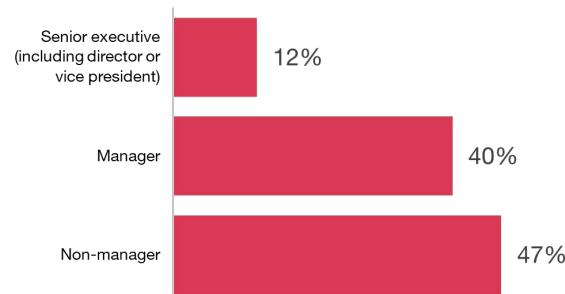


Job demographics (cont'd)

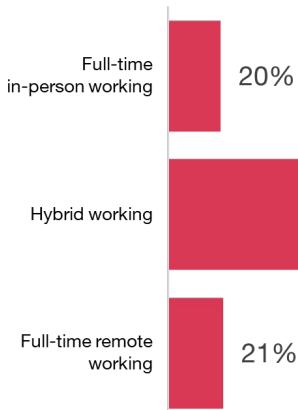
Number of jobs they currently have



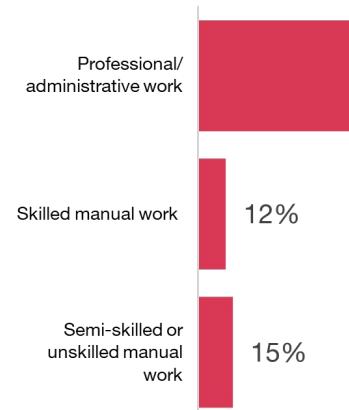
Primary role



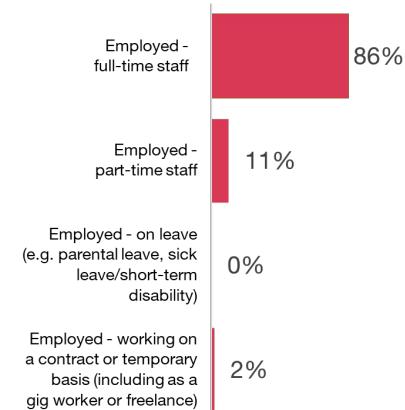
Working mode



Type of work



Employment status



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