

Indonesia Hopes and Fears Survey 2024

Workers are ready for change. Are leaders ready to engage them?

Indonesia key findings



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Workers are ready for change. Are leaders ready to engage them?

1,000 workers in Indonesia

Indonesian workers are experiencing significant workplace challenges, including **excessive change and increased workloads, yet most remain optimistic and willing to adapt to changes:**

Change pressures

Over half of workers say there's too much change at work

46%

say their workload has increased over the last year.

Cost of living eased slightly

61% have money left over at the end of the month

38%

say they are financially stressed despite this.

More restless

39% of workers say they plan to ask for pay raise

19%

plan to change jobs.

Key action items

1. Leading through transformation

New leadership is required to inspire and engage the workforce amid transformation as CEOs evolve their business.

- Lead in new ways to build resilience in a stressed-out workforce
- Inspire employees to drive transformation

2. Unleashing GenAI

Leaders have a critical role to play in helping employees make the most out of this technology.

- Help employees lead on innovation
- Instill confidence in AI

3. Powering performance through upskilling and the employee experience

Skills, pay and fulfillment are critical to helping employees stay engaged and productive.

- Recognise that skills are a currency to workers
- Prioritise the employee experience for performance

4. Climate change

Opportunities and concerns regarding climate change should go hand-in-hand with workers' responsibilities to reduce environmental impact.

- Its impact on job
- Employer responsibility

Leading through transformation



Leading through transformation

The rapid pace of change may make it difficult for employees to fully engage in their present work – let alone invest in how their jobs may change in the future.

Lead in new ways to build resilience among a stressed-out workforce

- Leaders need to **prioritise well-being** as a core value and critical enabler of performance.

When leaders prioritise their own well-being, they set a positive example for their teams. This can boost employee morale, increase engagement, and reduce turnover rates, creating a more stable and committed workforce.

- Leaders must also help workers learn to **better adapt to change**, which requires transformative leadership.

Transformative leadership inspires and motivates employees, especially on organisations undergoing generational transformation, in ensuring higher levels of engagement and morale, workers feel more supported and valued, boosting overall job satisfaction.

- Senior leaders should **assist middle managers in developing their own resilience** and fostering it within their teams.

Focus on resilience helps middle managers manage stress and maintain their mental health, leading to a healthier, more engaged workforce.

Engage employees on change to drive transformation

- Employees to **understand the reasons for change**.

When employees understand the reasons for change, they feel more involved and committed to the process, leading to higher levels of engagement and motivation.

- Engage and inspire employees by **sharing Leader's vision for the future** of the company and their role in that future.

Inspired employees are more likely to take initiative and think creatively. They feel empowered to contribute new ideas and solutions that drive the company forward.

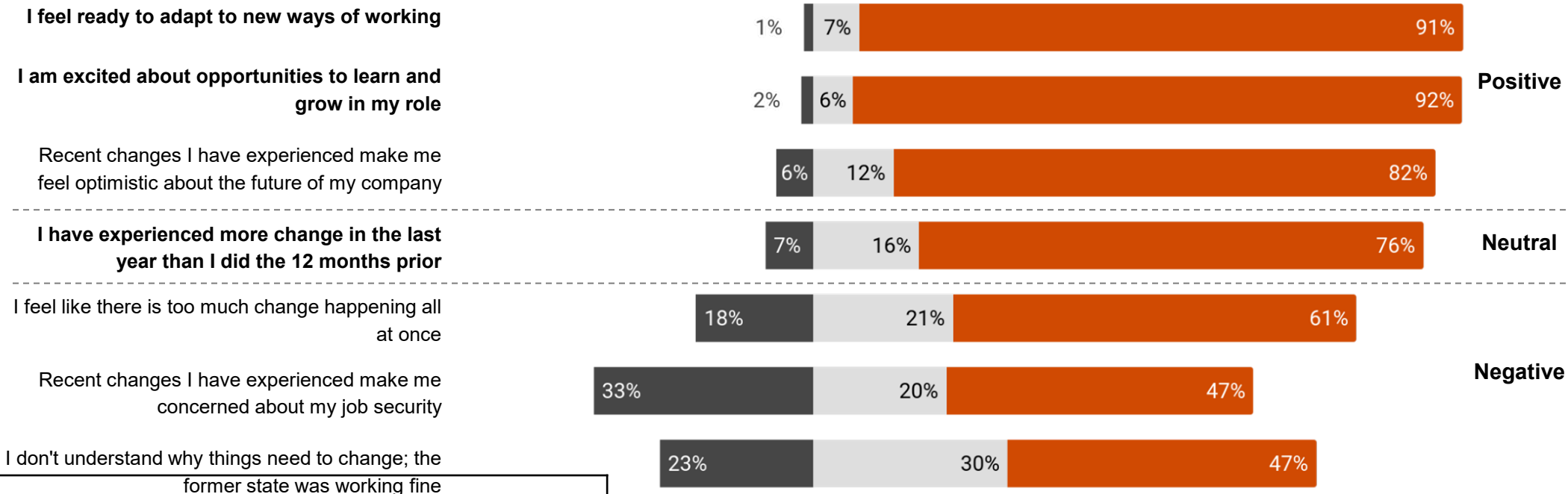
- **Frequent and transparent communication** from leaders at every level is essential.

Frequent and transparent communication builds trust and credibility between employees and leadership, especially for organisations experiencing generational gap. When leaders are open and honest, employees feel more secure and confident in the direction of the organisation.

76% of Indonesian workers said they encountered more changes than they did in the previous year. However, they are ready to adapt to the change

Q28. Thinking about changes you have experienced in your role in the last 12 months, to what extent do you agree or disagree with the following statements?

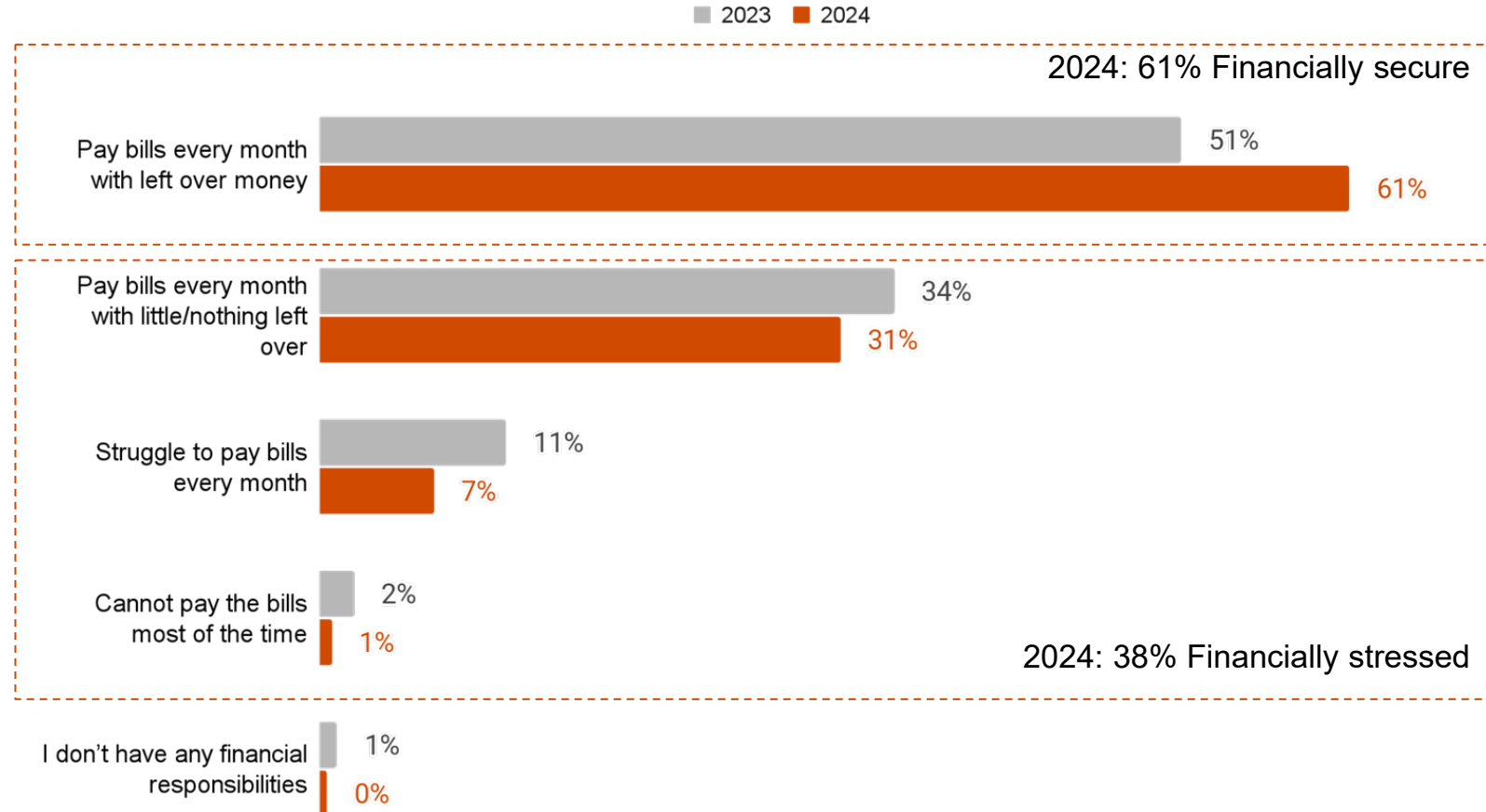
■ Disagree ■ Neither agree nor disagree ■ Agree



Notes:
 Base: Indonesia (1,000)
 Source: PwC Global Workforce Hopes and Fears Survey 2024

Although the level of financial security in the Indonesian workforce has somewhat rebounded from last year, nearly 40% of the workforce is still financially stressed

Q39. Which of the following best describes your current financial situation?



Notes:

Base: 2024: Indonesia (1000)

Base: 2023: Indonesia (1000)

Source: PwC Global Workforce Hopes and Fears Survey 2024

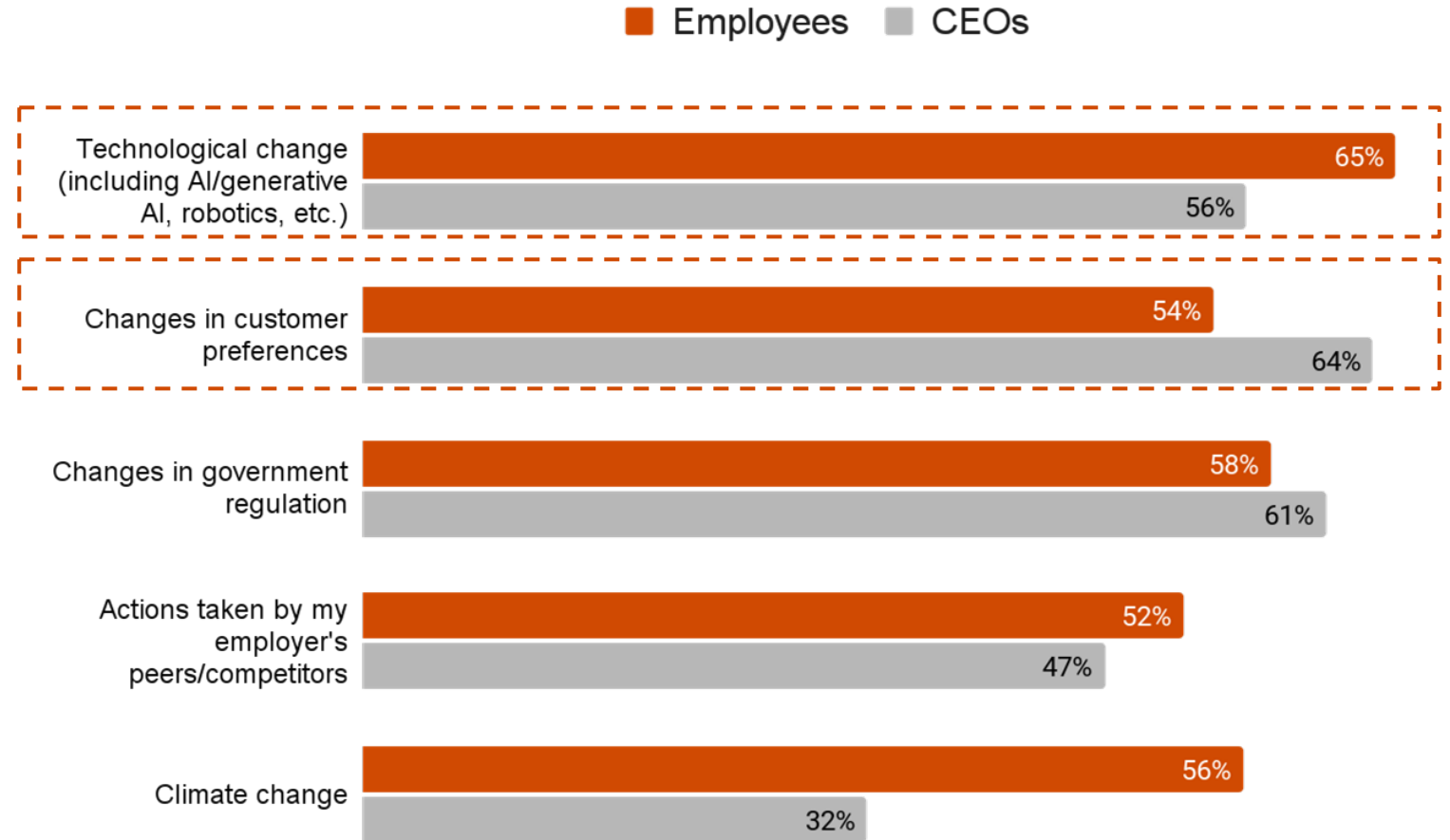
Indonesian CEOs are more likely to view customer preferences as the primary driver of change, while workers expect technological changes to influence them over the next three years

Q29. In the next three years, to what extent, if any, do you think each of the following will impact your job?

(Showing net 'very large / large extent' responses only)

27th CEO Survey: Please indicate the extent to which the following factors will drive changes to the way your company creates, delivers and captures value in the next three years?

(Showing net 'very large / large extent' responses only)



Notes:

Base: Indonesia (1,000) N.B. re-based for comparison to CEO data.)
 Sources: PwC Global Workforce Hopes and Fears Survey 2024 and PwC 27th Annual Global CEO Survey

Unleashing GenAI



Unleashing GenAI

Creating efficiencies with GenAI is important, but it's only scratching the surface

Help employees lead on innovation

- Empowering **innovation and growth**

The promise of GenAI lies in its potential to not only improve workflows but also drive growth by empowering employees to innovate and iterate, leading to new ideas, enhanced processes, and overall organisational advancement.

- Offering **upskilling**

Employees stay relevant and adaptable in an ever-changing technological landscape. This prepares the workforce to meet future challenges head-on, safeguarding the organisation's long-term success.

- **Senior leaders should lead by example**

Only about one in five senior executives and 17% of managers say they're using GenAI daily – a clear call to action for leaders to upskill and use GenAI, not just for their own work, but so that they can coach employees to use it in theirs.

Instil confidence in GenAI

- Establishing **trust in AI** and fostering adoption

Trust in AI encourages employees to leverage AI technologies to develop new products, services, and solutions, keeping the organisation ahead of competitors. It's something leaders must prioritise and make time for, not just once, but continually as GenAI evolves.

- Improving **decision-making**

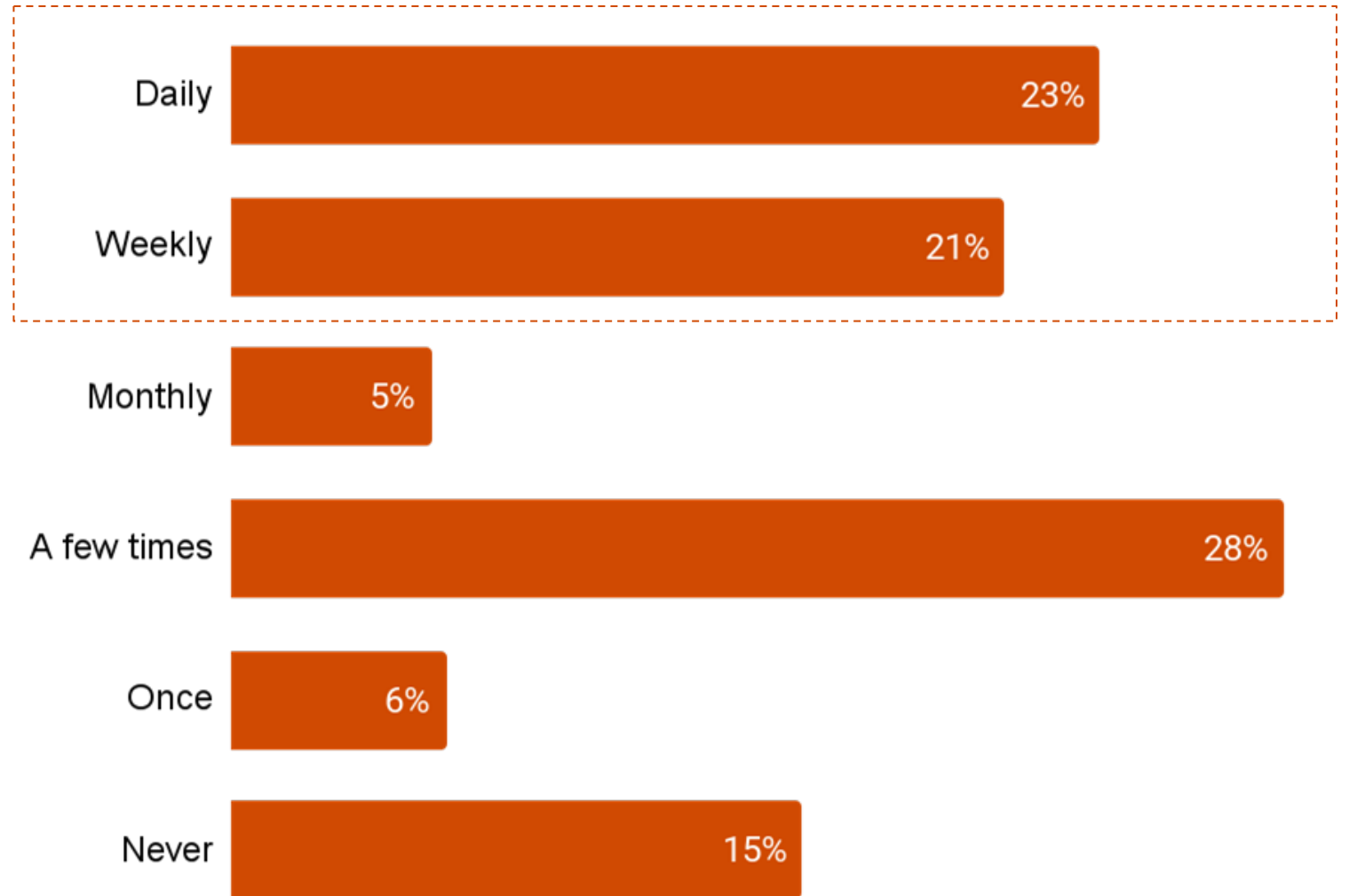
Be transparent about the use of AI systems in decision-making processes and communicate how these systems are designed, the data they use, and the algorithms they employ.

- **Employee feedback is critical**

Employee feedback provides valuable insights into the practical application and impact of AI systems. This feedback loop enables continuous improvement of AI tools, ensuring they are more user-friendly and effective.

In the past year, 84% of Indonesian workers have utilised GenAI at work at least once, with over 40% using it on a regular basis, either daily or weekly

Q32. In the past 12 months, how updated, if at all, have you used generative AI tools (e.g. ChatGPT, DALL-E) for work?



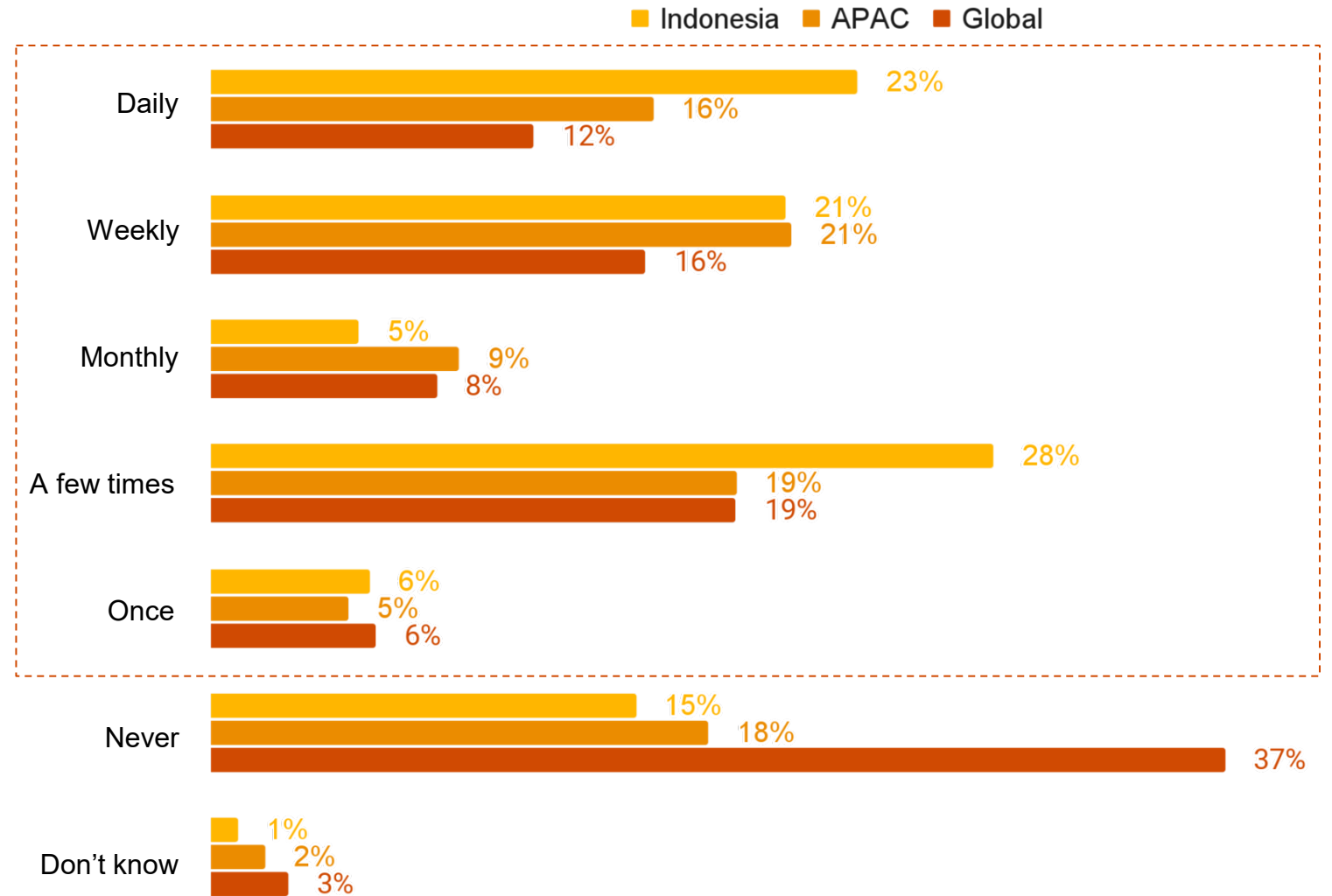
Notes:

Base: Indonesia (1,000)

Sources: PwC Global Workforce Hopes and Fears Survey 2024 and PwC 27th Annual Global CEO Survey (4702)

GenAI adoption in the workplace is limited - While more than 60% of global workers have used it at least once in the past year, only 12% use it daily.

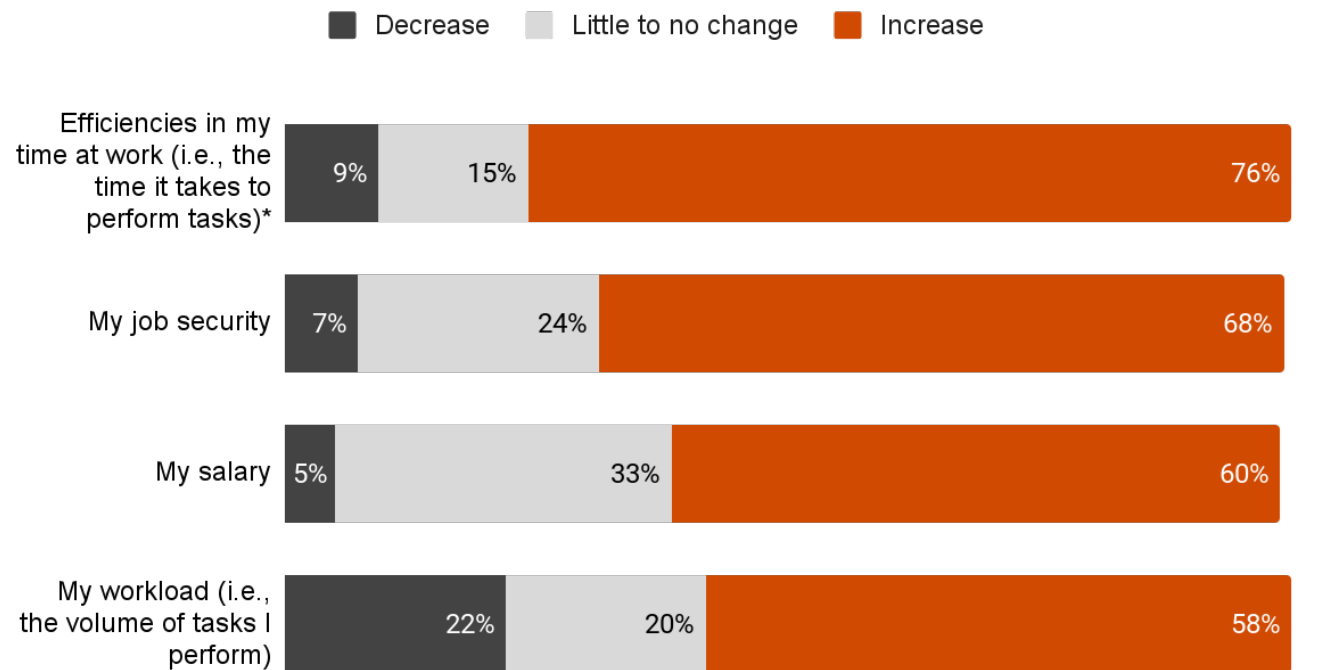
Q32. In the past 12 months, how often, if at all, have you used generative AI tools (e.g. ChatGPT, DALL-E) for work?



Notes:
 Base: Indonesia (1,000)
 Base APAC (19,500)
 Base Global (56,600)
 Sources: PwC Global Workforce Hopes and Fears Survey 2024 and PwC 27th Annual Global CEO Survey (4702)

76% of Indonesian workers expect GenAI to enhance efficiency at work and increase workload – Optimistically, more than 60% perceive it will lead to higher salaries and job security

Q34. In the next 12 months, to what extent do you think generative AI will increase or decrease the following aspects of your job?



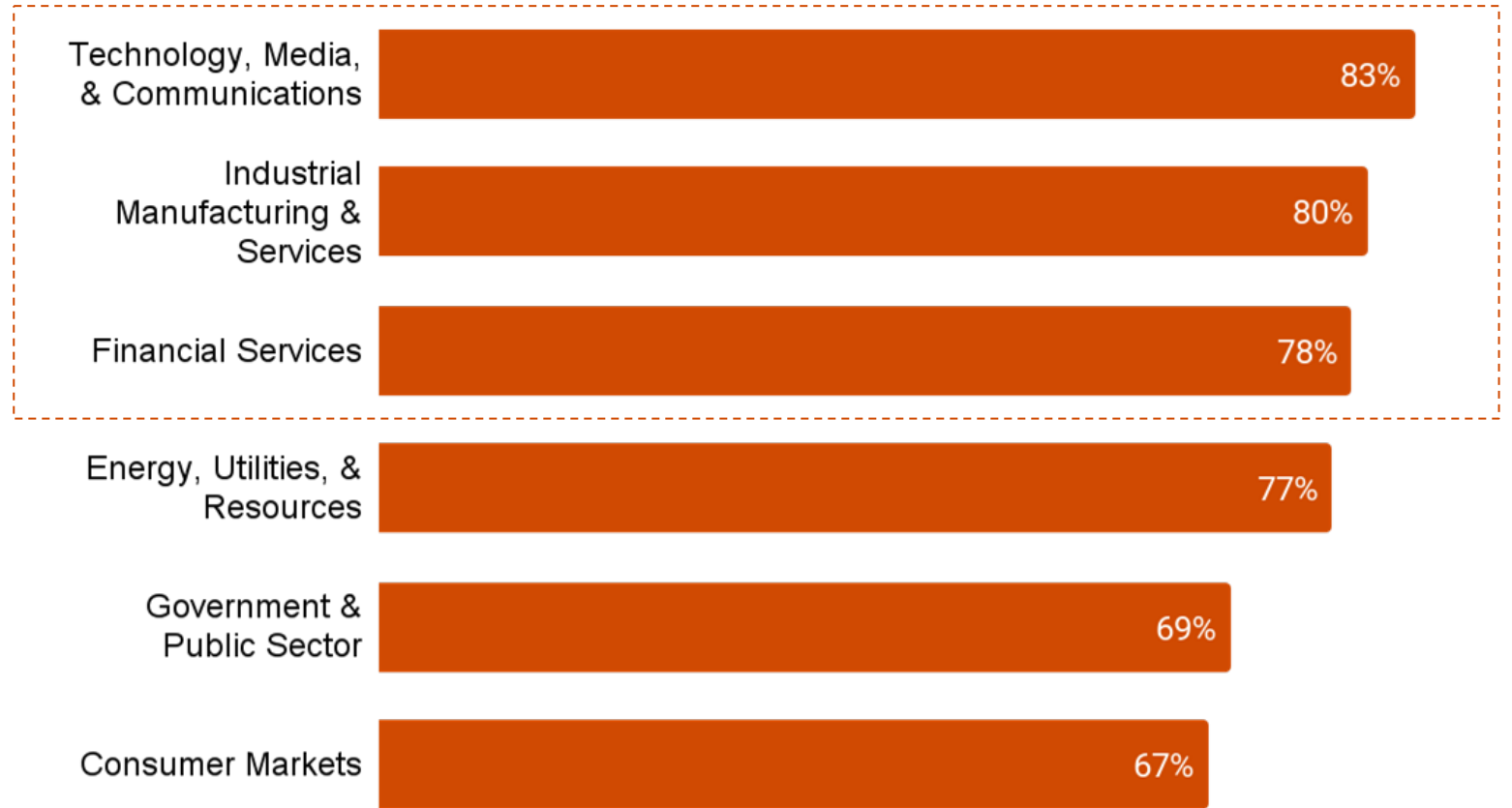
27th CEO Survey comparison
57% of Indonesian CEOs also expected GenAI to increase efficiencies in their employees' time at work

*Excludes GandPS workers to be comparable with CEO Survey data

Notes:
Base: Indonesia (892)
Source: PwC Global Workforce Hopes and Fears Survey 2024

Indonesian workers in TMT, Industrial Manufacturing, and Financial Services are more likely to expect GenAI to boost their efficiency at work

Q34. In the next 12 months, to what extent do you think generative AI will increase efficiencies in your time at work?



Notes:

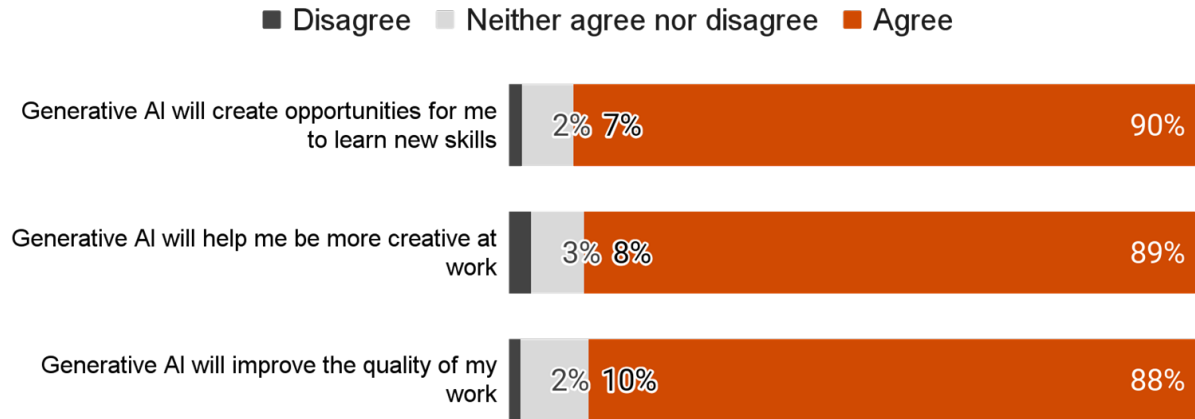
Base: Indonesia (1,000)

Source: PwC Global Workforce Hopes and Fears Survey 2024

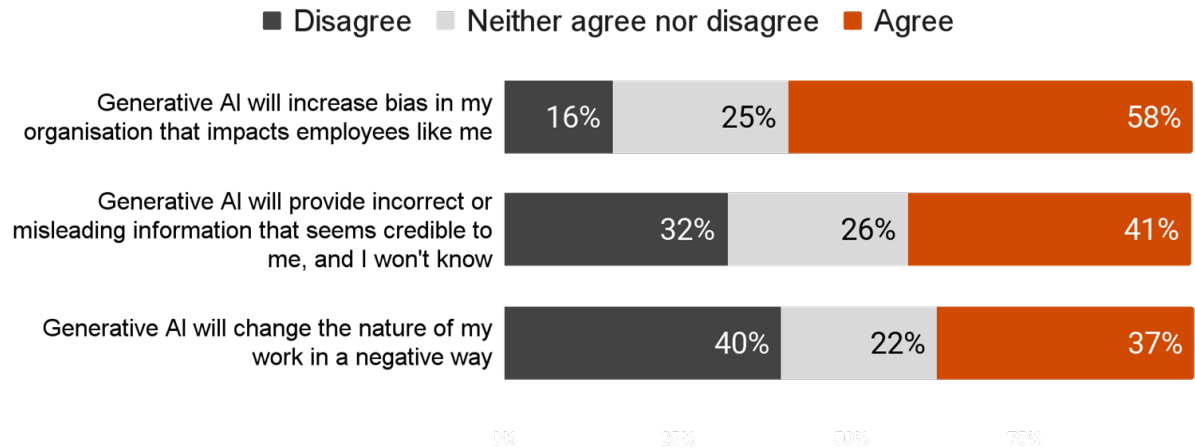
While over 80% of Indonesian workers expect benefits from GenAI (create opportunities as the highest benefit), at least 37% also recognise the potential risks (increase bias in organisation as the highest risk)

Q36. Thinking about the potential impact of generative AI tools on your career, to what extent do you agree or disagree with the following statements?

GenAI benefits



GenAI risks



Notes:

Base: Indonesia (892)

Source: PwC Global Workforce Hopes and Fears Survey 2024

Fuelling
performance
through upskilling
and employee
experience



Fuelling performance through upskilling and employee experience

Employees who feel they aren't getting what they need are likely to be less engaged at work and less willing to buy into change.

Recognise how critical skill-building is to workers

- **Workers value upskilling**

Increasingly prioritising roles that offer continuous learning and professional development, as these opportunities not only enhance their current skill sets but also improve their future career prospects.

- **Companies need to create guidance about the types of required skills for employees**

Understanding that skill-building is vital to employees, companies must provide clear guidance on the types of skills needed for future success. This involves identifying key competencies, offering mentoring, and creating structured development plans.

- **Uncover hidden talent with skills inventories**

Recognising the critical importance of skill-building to workers, companies should leverage skills inventories to uncover hidden talent within their existing workforce. By gaining comprehensive insights into employees' skills and expertise, organisations can identify untapped potential and better align talent with business needs.

Prioritise the employee experience for performance

- **Competitive and liveable wage**

Ensuring employees liveable wage is fundamental to prioritising the employee experience, which in turn drives enhanced performance. Competitive compensation not only attracts top talent but also retains valuable employees, reducing turnover and associated costs.

- **Flexibility and fulfilling work**

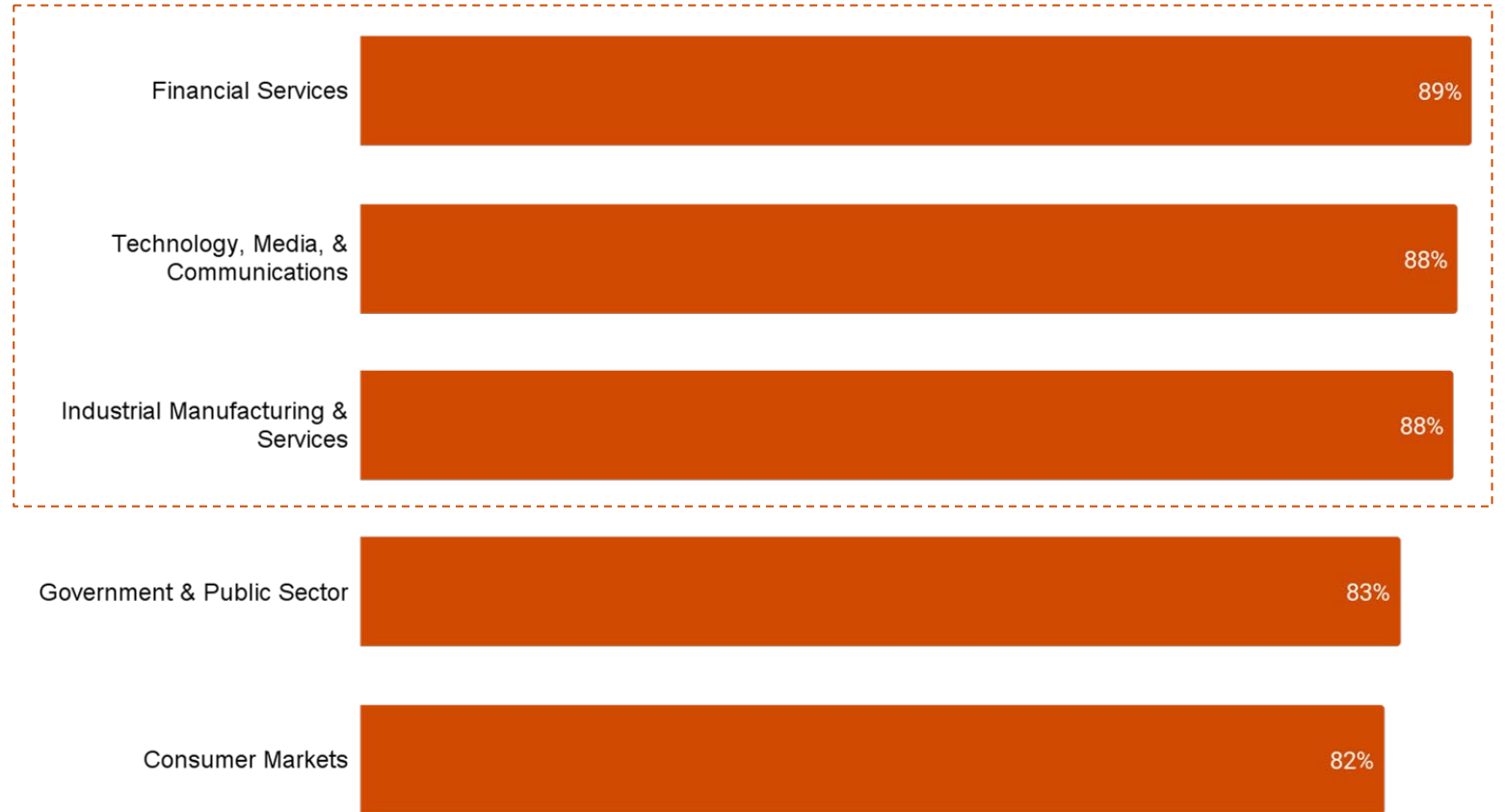
Offering flexibility and fulfilling work is crucial for prioritising the employee experience, which directly impacts performance. Flexible work arrangements, such as remote work and flexible hours, enable employees to achieve a better reducing stress and increasing job satisfaction.

- **Rationalising and alignment of technology**

Streamlined technology improves productivity by simplifying tasks and enabling employees to focus on high-value activities rather than dealing with cumbersome or redundant systems. Additionally, providing the right tools and training enhances employees' ability to perform their roles effectively, fostering a sense of competence and job satisfaction.

Indonesian workers in Financial Services, Technology, Media and Telecommunications (TMT), and Industrial Manufacturing are most likely to have opportunities to learn new skills that will be helpful for their future careers

Q19. To what extent do you agree or disagree with the following statement: My employer provides me with adequate opportunities to learn new skills that will be helpful for my future career?



Notes:

Base: Indonesia (911)

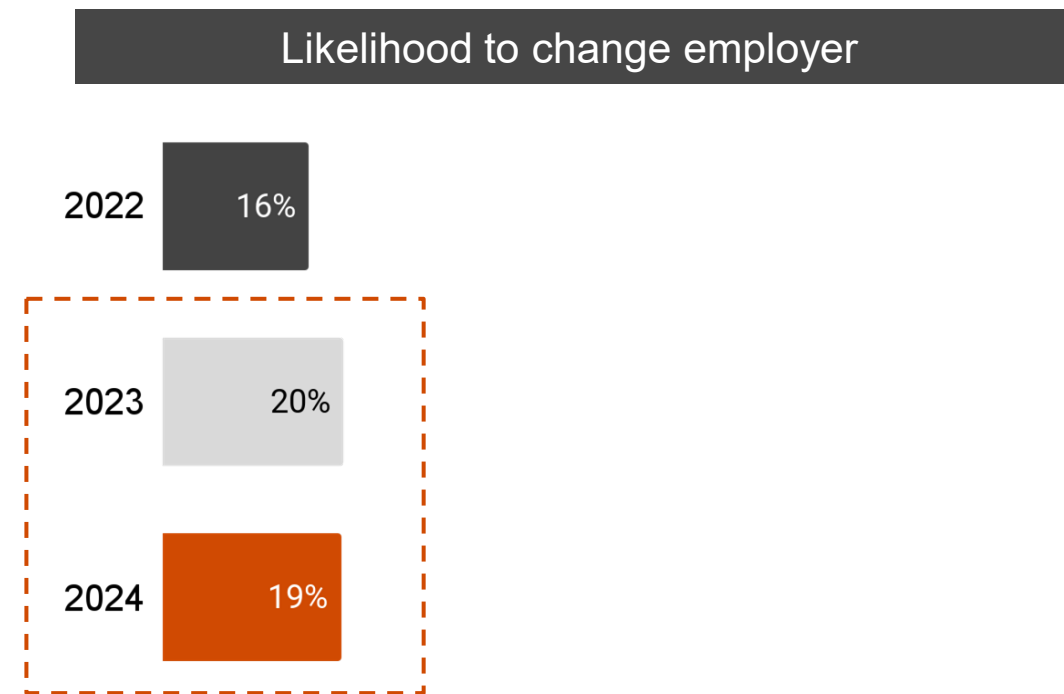
Source: PwC Global Workforce Hopes and Fears Survey 2024

Even with a stable trend in job satisfaction, around 20% of Indonesian employees indicate they are likely to switch employers within the next year

Q16. How satisfied are you with your job?
(Showing only 'moderately satisfied' and 'very satisfied' responses)



Q37. How likely are you to change employer in the next 12 months?
(Showing only 'very likely' and 'extremely likely' responses)



Notes:
Base: 2024: Indonesia (1,000)
Base: 2023: Indonesia (1,000)
Base: 2022: Indonesia (1,043)
Source: PwC Global Workforce Hopes and Fears Survey 2024

Indonesian Employees who said they are likely to switch employers in the next 12 months are 1.5x more likely to consider upskilling in such decisions

Q20. When considering whether to stay with your current employer or switch to a new one, to what extent would the opportunity to learn new skills influence that decision?
(Showing only 'to a large extent' and 'to a very large extent' responses)

Likelihood to switch to a new employer among those with strong consideration of upskilling opportunities

Likely to switch to a new employer in next 12 months



Not likely to switch to a new employer in next 12 months



1.5x more likely to agree

Notes:

Base: Not likely to change employer (not likely/slightly likely) (1000).

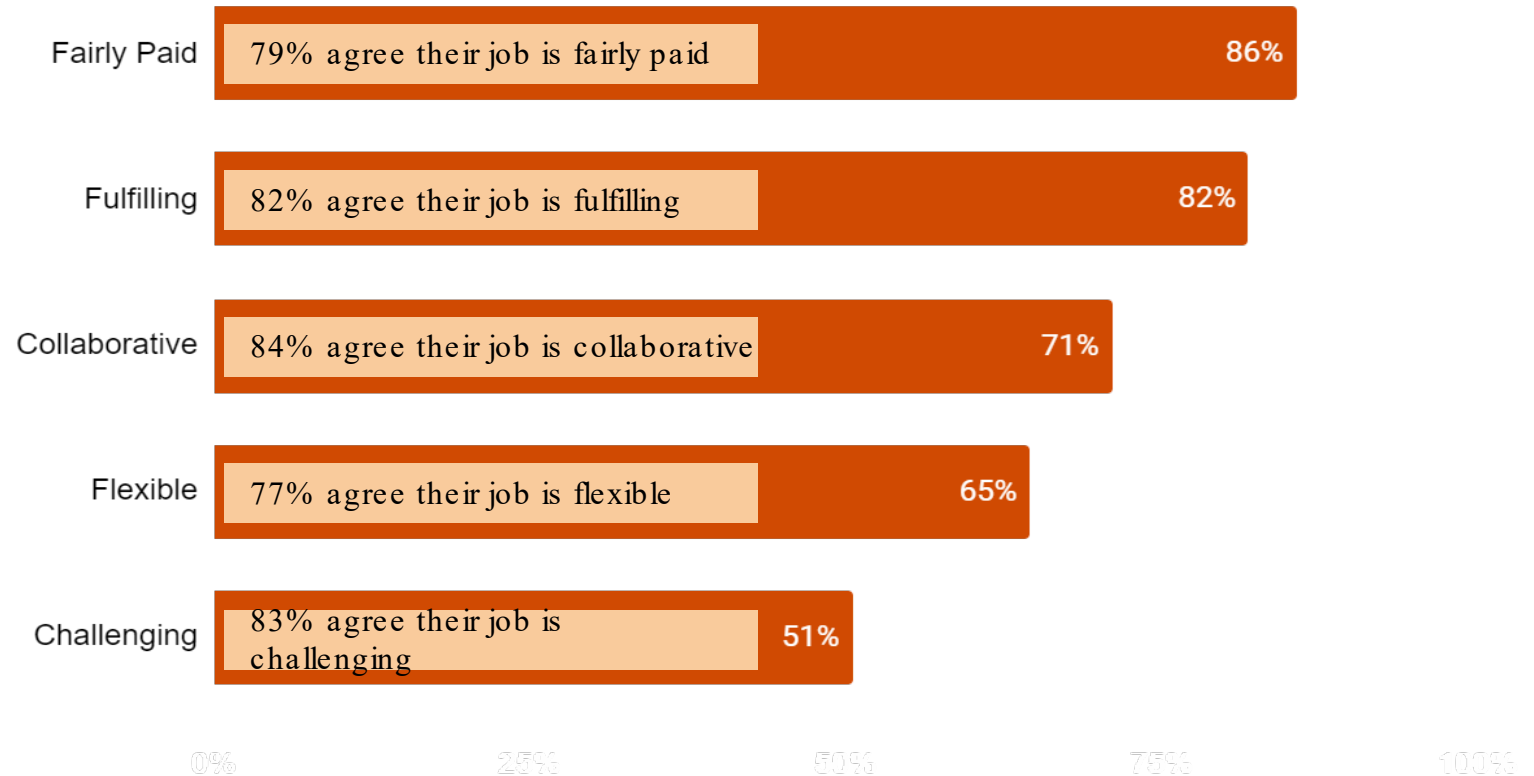
Base: Likely to change employer (very/extremely likely) (1000)

Source: PwC Global Workforce Hopes and Fears Survey 2024

Indonesian employees place high importance on fair pay, fulfilling work, and collaboration, and these priorities correspond with their agreement on their current positions

Importance vs Agreement

(rebased at each attribute to show only those who selected 'very important' or 'extremely important')



Q21. How important is to you that your job is...
(Showing net 'extremely / very important' responses only)

Q22. To what extent do you agree or disagree that your current job is...
(Showing 'strongly / moderately agree' responses only)

Notes:

Q21. Base: Indonesia (505-856)

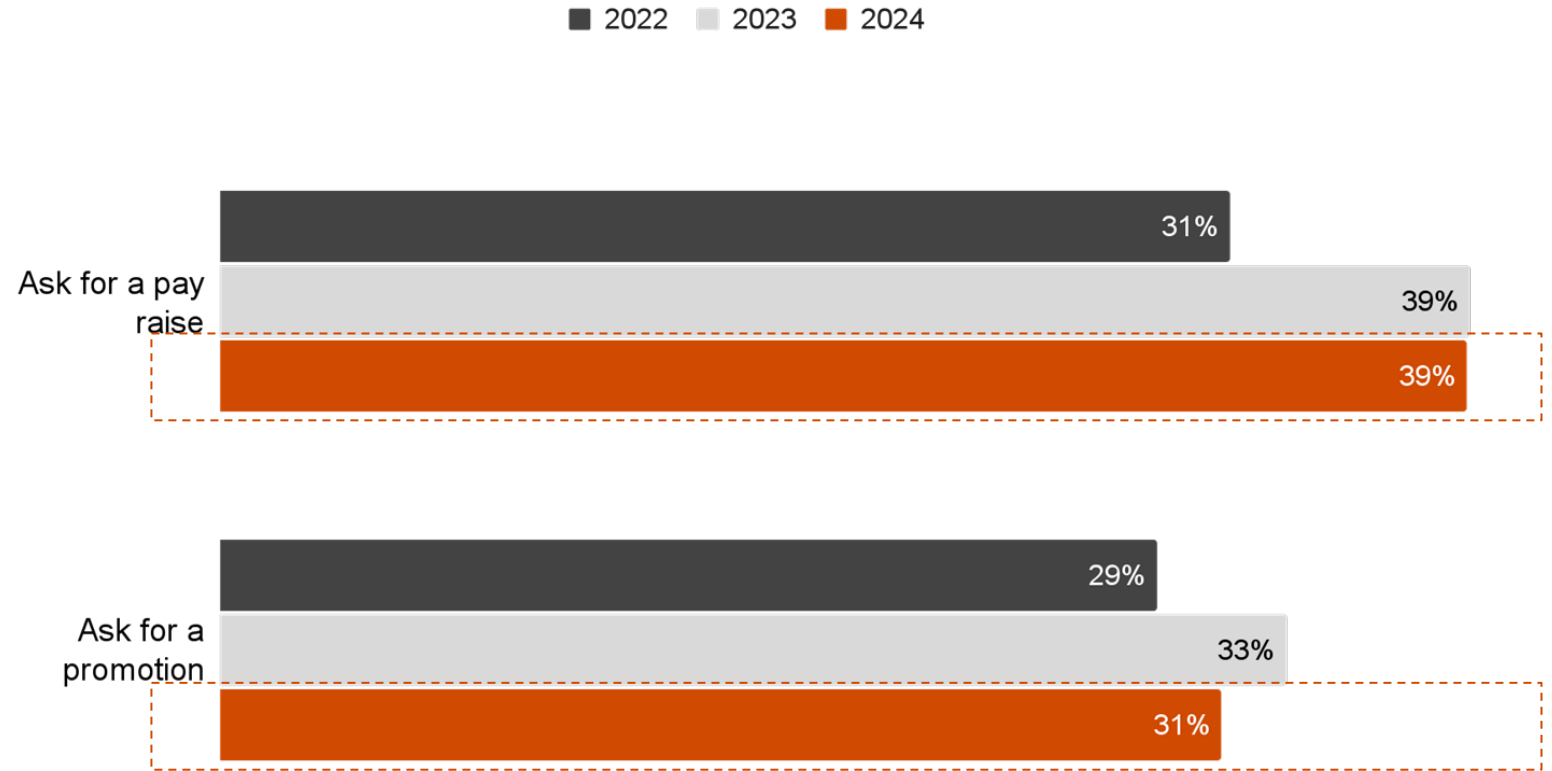
Q22. Base: Indonesia (830-903)

Source: PwC Global Workforce Hopes and Fears Survey 2024

Nearly 40% of Indonesian workers plan to ask for a pay rise and around 30% intend to request a promotion

Q37. How likely are you to take the following actions in the next 12 months?

(Showing only 'very likely' and 'extremely likely' responses)



Notes:

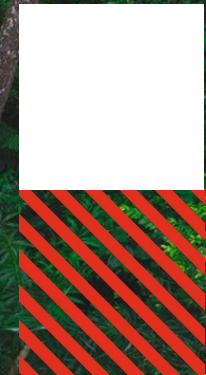
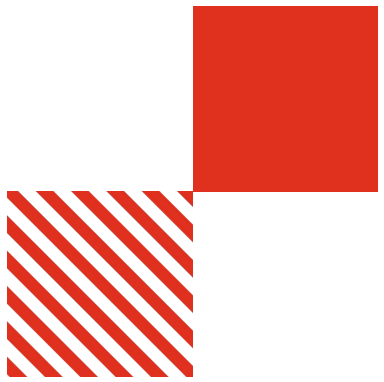
Base: 2024: Indonesia (1,000)

Base: 2023: Indonesia (1,000)

Base: 2022: Indonesia (1,043)

Source: PwC Global Workforce Hopes and Fears Survey 2024

Climate change



Climate change



The complexity of environmental issues may make it challenging for employees to fully understand their current ecological impact – let alone adapt to future sustainability requirements.

Its impact on job

- Climate change requires **new skill sets and expertise for employees**

As organisations adapt to climate change, employees must acquire new skills related to sustainability and environmental compliance. This shift ensures that the workforce remains competitive and aligned with evolving industry standards.

- Climate change **drives the creation of new job roles and career paths**

The growing focus on sustainability due to climate change leads to the emergence of new roles, such as climate risk assessors and renewable energy specialists. Employees must adapt to these evolving positions, which offer career growth opportunities while addressing emerging environmental challenges.

- Climate change increases the emphasis on **corporate social responsibility**

Companies are under pressure to demonstrate their environmental commitment, which affects job expectations. Employees are expected to contribute to their organisation's sustainability goals and integrate eco-friendly practices into their daily tasks, enhancing overall job satisfaction and organisational impact.

Employer responsibility

- Employees need to understand the **impact of climate change on their roles**

When employees grasp how climate change affects their job responsibilities and the company's overall strategy, they are more engaged and motivated to align their efforts with sustainability goals. This understanding fosters a sense of purpose and commitment.

- **Engage employees** by illustrating how sustainability initiatives contribute to the company's long-term success

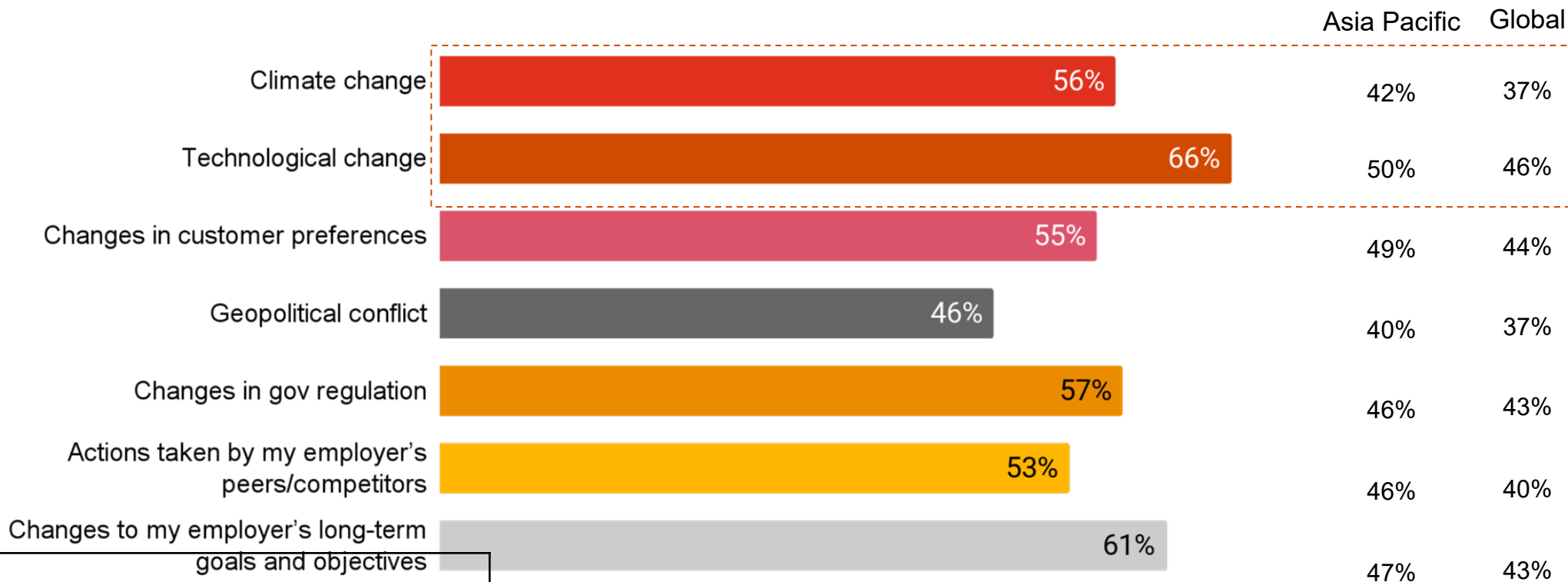
By sharing a compelling vision of how environmental responsibility benefits the organisation's future, leaders inspire employees to embrace sustainability practices. This motivation encourages proactive contributions and innovative thinking towards climate solutions

- **Regular updates from leaders** about climate goals and progress are crucial

Ongoing, honest communication from leadership about the company's climate strategy and achievements builds trust and transparency. Employees who are kept informed feel more secure and involved, which enhances their engagement and support for climate-related initiatives.

Workers in Indonesia are more likely to anticipate impact on their jobs across a number of areas in the next three years compared to the workers in Asia Pacific and global

Q29. In the next three years, to what extent do you think each of the following will impact your job?



Notes:

Base: Indonesia (1,000), Base APAC (19,500), Base Global (56,600)

Source: PwC Global Workforce Hopes and Fears Survey 2024

Workers in Indonesia are more likely to anticipate the negative impacts of climate change on their job than workers in Asia Pacific and global

Q30. In what ways do you think climate change will impact your job?

Climate change opportunities

New technologies or advancements in my field related to climate change will require me to learn new skills

43%

Asia Pacific

40%

Global

36%

New technologies or advancements in my field that are related to climate change will create new job opportunities

38%

37%

34%

Climate change concerns

Climate change impacts may cause me to lose my job

35%

35%

28%

Disruptions from extreme weather events or environmental changes will impact my ability to do my job

50%

40%

33%

Climate change will introduce health and safety risks in my workplace

65%

51%

44%

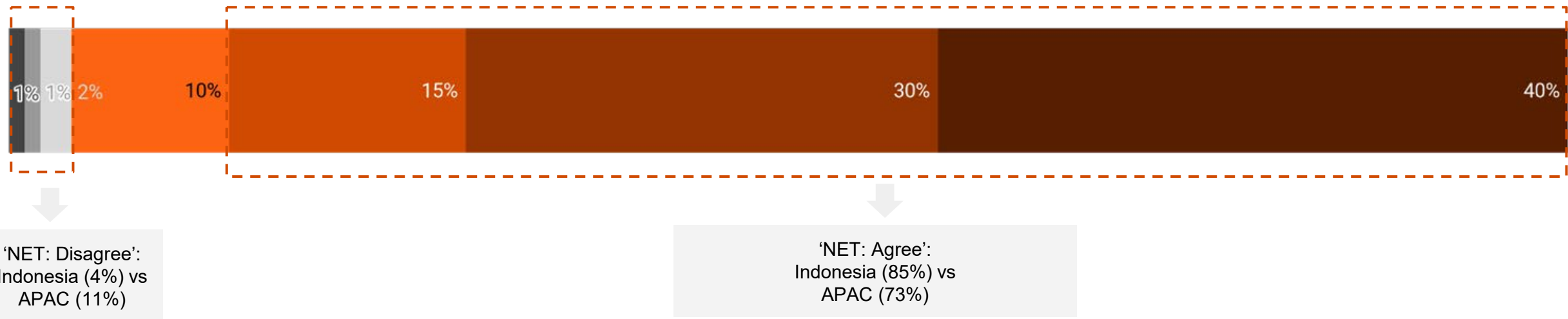
Notes:

Base: Indonesia (1,000), Base APAC (15,687), Base Global (42,576)
Source: PwC Global Workforce Hopes and Fears Survey 2024

More than 8 in 10 workers in Indonesia agree that employers have a responsibility to reduce their environmental impact

Q31. To what extent do you agree or disagree that your employer has a responsibility to reduce its environmental impact?

■ Strongly disagree ■ Moderately disagree ■ Slightly disagree ■ Neither agree nor disagree ■ Slightly agree ■ Moderately agree ■ Strongly agree ■ Don't know



Notes:
Base: Indonesia (1,000)
Source: PwC Global Workforce Hopes and Fears Survey 2024

Conclusion

Leading through transformation

- There has been a **small increase in financial security for the Indonesian workforce** over the past year, a substantial segment continues to face financial stress, with nearly **40% of workers still struggling economically**. Concurrently, the workforce has experienced significant changes, with nearly half of employees seeing an **increase in their workload** and over **60% needing to learn new technologies to fulfill job requirements**. This combination of financial strain and evolving job demands highlights the ongoing challenges and opportunities within Indonesia's labor market, underscoring **the need for targeted support and continuous adaptation**.

Unleashing GenAI

- **The integration of Generative AI (GenAI) into the Indonesian workforce has been significant over the past year**, with **84% of workers having used it at least once** and over **40% incorporating it into their regular routines**. While a **majority of workers (76%) believe that GenAI will enhance overall efficiency**, more than half also **foresee an increase in workload**, highlighting the complex impact of this technology on the labor market. Additionally, although over **80% of workers expect GenAI to create new opportunities**, more than one-third acknowledge potential risks, particularly the increase in organisational bias. **This balanced perspective underscores the dual nature of GenAI's influence, offering both promising benefits and noteworthy challenges**.

Powering performance through upskilling

- **Indonesian employees place a high priority on fair pay, fulfilling work, and collaboration, and these values** are well-reflected in their current job satisfaction. Despite the availability of upskilling opportunities to adapt to workplace changes, a significant number of Indonesian workers are **proactively seeking career advancement** through financial and positional recognition. Approximately **39% intend to request a pay rise**, and **30% plan to ask for a promotion**, **indicating a strong desire for career progression and financial growth**.

Climate Change

- The evolving landscape of climate change presents numerous opportunities for Indonesia, particularly through the adoption of new technologies and advancements in various fields. **Indonesian professionals are increasingly recognising that supporting of these changes will be crucial for their career development and for contributing effectively to climate action**. A significant majority of Indonesian workers, over 8 in 10, believe that employers hold a crucial responsibility in reducing their environmental impact to combat climate change. **Employees are increasingly expecting their organisations to take substantial steps towards environmental stewardship, underlining the role of businesses in driving positive change and contributing to global climate action efforts**.



Thank you

Read more at: pwc.com/hopesandfears

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Appendix



1

Global Workforce Hopes and Fears Survey 2024 overview



The view of the workers' experiences and expectations

Global Workforce Hopes and Fears Survey 2024

PwC's annual flagship workforce thought leadership survey. The survey is central to the Workforce Campaign, C-Suite Agenda and The New Equation strategy.

Our goal

Position PwC as a leader in helping businesses meet the workforce challenges of a rapidly changing world and transform to create sustained outcomes.

Overarching theme for the survey

This year's Hopes and Fears Survey builds on the theme of reinvention readiness, exploring themes related to workforce including leading through transformation, unleashing GenAI and creating a next-gen employee experience.

Surveying

56,600

People worldwide

Scope

50

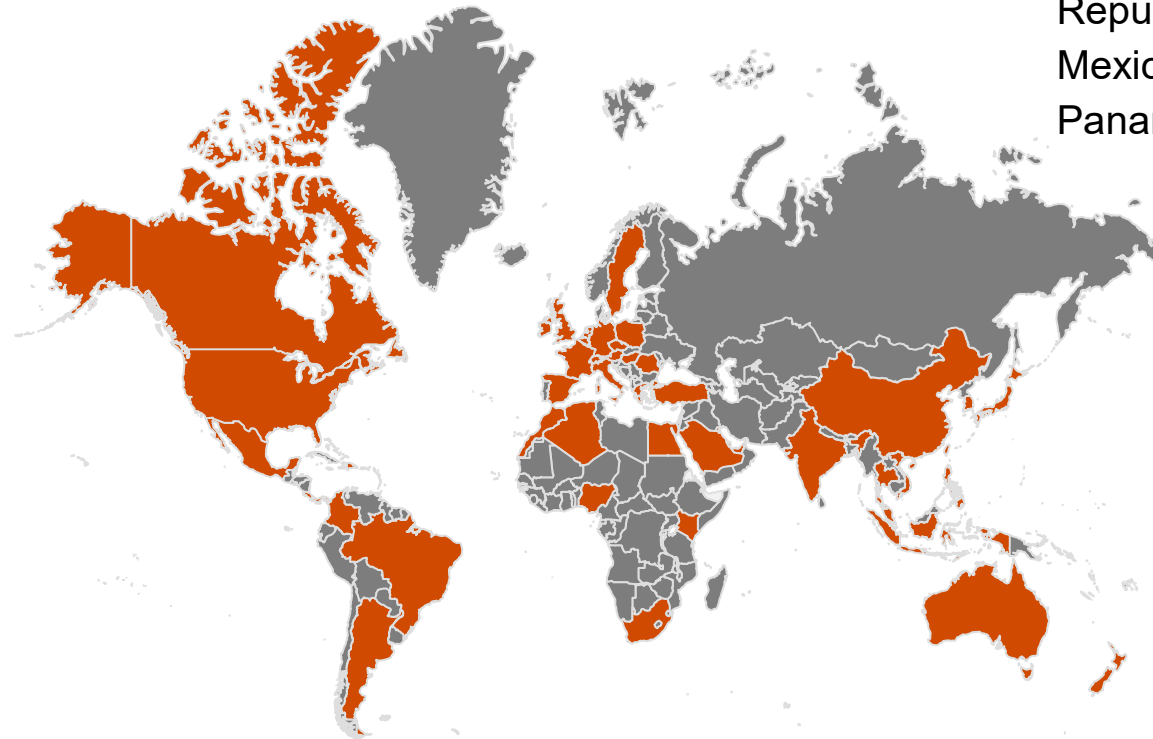
Territories across our network



Global coverage: 56,600 workers across 50 territories



Africa	Asia Pacific	CEE	Middle East	North America	Latin America	Western Europe
Algeria	Australia	Czech Republic	Egypt	Canada	Argentina	Austria
Kenya	China	Hungary	KSA	United States	Brazil	Belgium
Morocco	Hong Kong SAR	Poland	Qatar		Colombia	Denmark
Nigeria	India	Romania	UAE		Costa Rica	France
South Africa	Indonesia				Dominican Republic	Germany
	Japan				Mexico	Greece
	Malaysia				Panama	Ireland
	New Zealand					Italy
	Philippines					Netherlands
	Singapore					Spain
	South Korea					Sweden
	Taiwan					Switzerland
	Thailand					Turkey
	Vietnam					United Kingdom



We have surveyed workers from across 29 sectors

Sectors covered in HandF24

Aerospace, Defense and Security

Agriculture

Asset and Wealth Management

Automotive

Banking and Capital Markets

Business support services (including business process outsourcing and building services)

Chemicals

Communications

Consumer Goods

Education

Energy, including Oil and Gas

Engineering and Construction

Entertainment and Media

Forest, Paper and Packaging

Government/Public Services

Healthcare

Hospitality and Leisure

Industrial Manufacturing

Insurance

Metals and Mining

Pharmaceuticals and Life Sciences

Power and Utilities

Private Equity

Professional services (including legal and consulting)

Real Estate

Retail

Technology

Transportation and Logistics

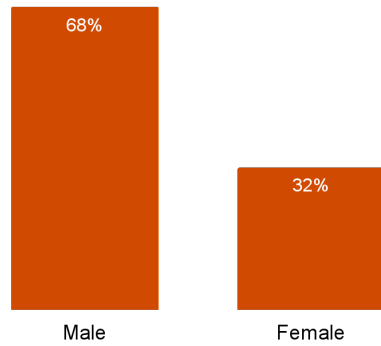
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Indonesia overview and demographics

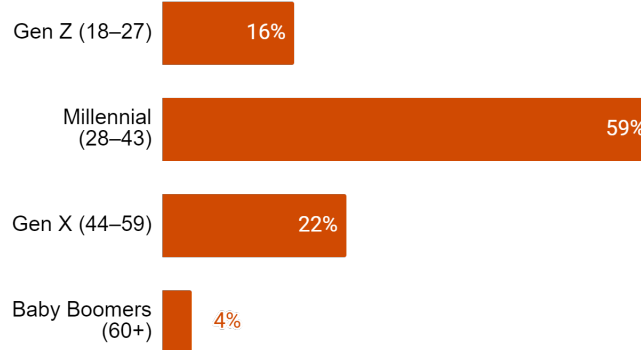


This year's survey received 1,000 responses from Indonesians representing different backgrounds.

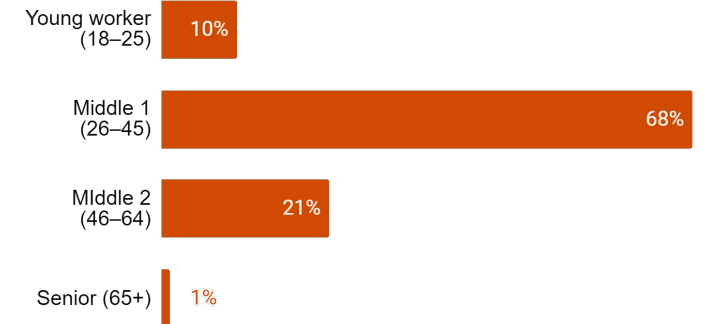
Gender*



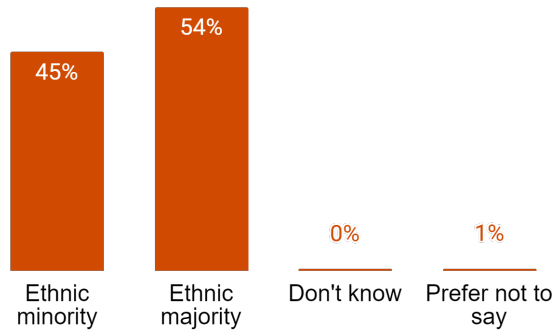
Generations



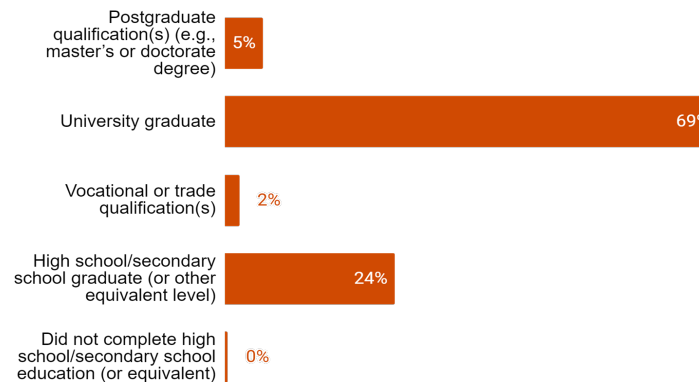
Worker Age



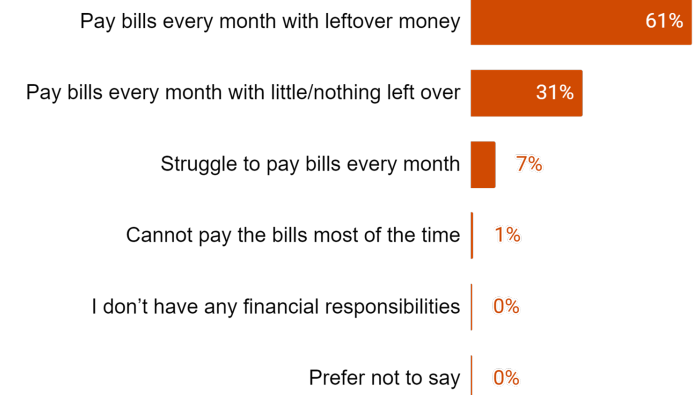
Ethnic groups**



Education



Financial situation



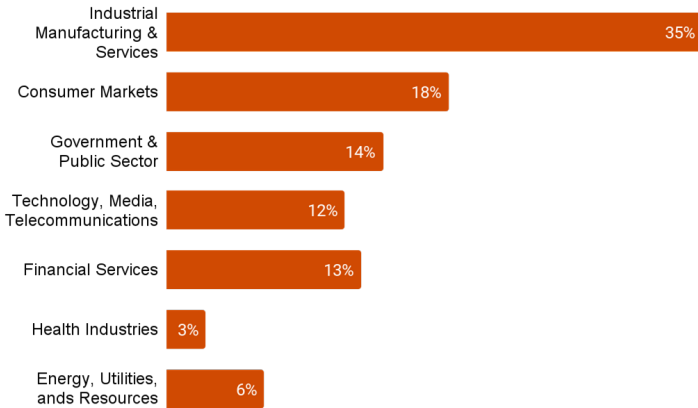
Notes :

Base: Indonesia (1,000)

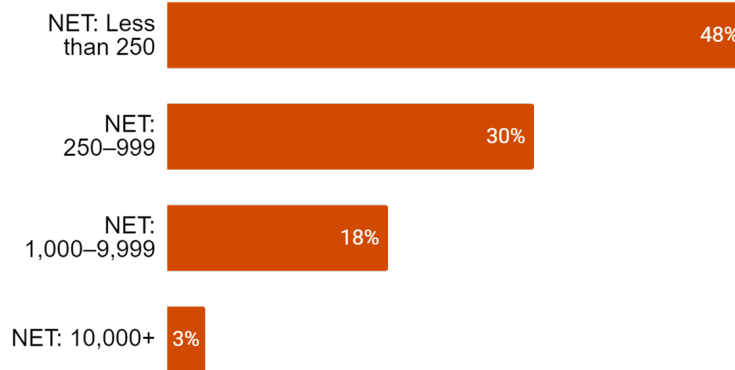
Source: PwC Global Workforce Hopes and Fears Survey 2024

A broad range of functions is represented by the 75% of Indonesian respondents who are office workers.

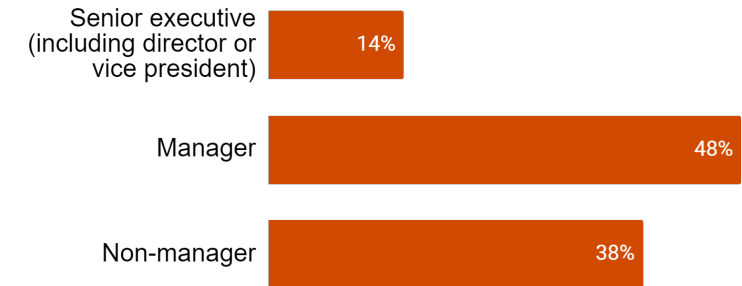
Industry



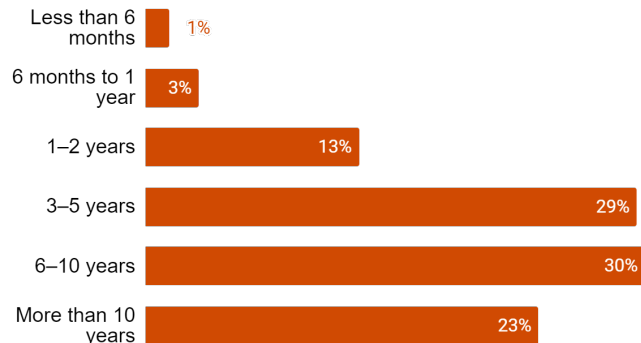
Org size



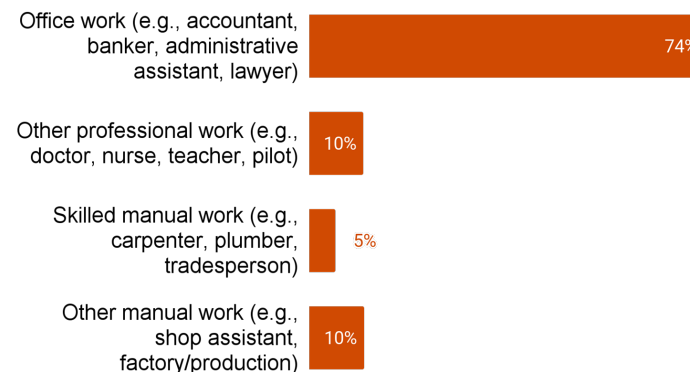
Seniority



Tenure



Type of work



Office work – Function



Notes :

Base: Indonesia (1,000)

Source: PwC Global Workforce Hopes and Fears Survey 2024

The majority of Indonesian workers are operating remotely in a hybrid setup, consistent with last year's trends

Q13. Can your job be done remotely/from home?

Q14. Regarding your current role, how are you currently working?

Q15. In the past 12 months, have you worked remotely from another country?

Can job be done remotely/from home?

No:
42%
(vs 37% 2023)

Yes:
58%
(vs 63% 2023)

Significantly more likely to say job cannot be performed remotely:

- Health (71%)
- CM (52%)
- EUR (48%)

Significantly more likely to say job can be performed remotely:

- TMT (81%)
- FS (63%)
- IMandA (41%)

If remote/home working feasible*:

Hybrid working
70%
(vs 61% 2023)

Full time remote
10%
(vs 17% 2023)

Full-time in person
19%
(vs 22% 2023)

More likely to be workers from:

- EUR (82%)
- TMT (76%)
- FS (70%)

More likely to be workers from:

- CM (15%)
- Health (14%)
- TMT (14%)

More likely to be workers from:

- Health (43%)
- GandPS (28%)
- CM (22%)

Notes:

Base: Indonesia (1,000);

Source: PwC Global Workforce Hopes and Fears Survey 2024

*Base: Respondents whose job can be done remotely/from home (538)

*Base: Respondents who currently work full-time remote/hybrid (469)

Contact us

PwC Consulting Indonesia



Martijn Peeters

President Director

martijn.peeters@pwc.com



Lia Marina

Director

lia.marina@pwc.com



Lita Dewi

Director

lita.dewi@pwc.com



Read more at: pwc.com/hopesandfears

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