



Africa Workforce Hopes and Fears Survey 2025

Africa results | November 2025



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01

Overview



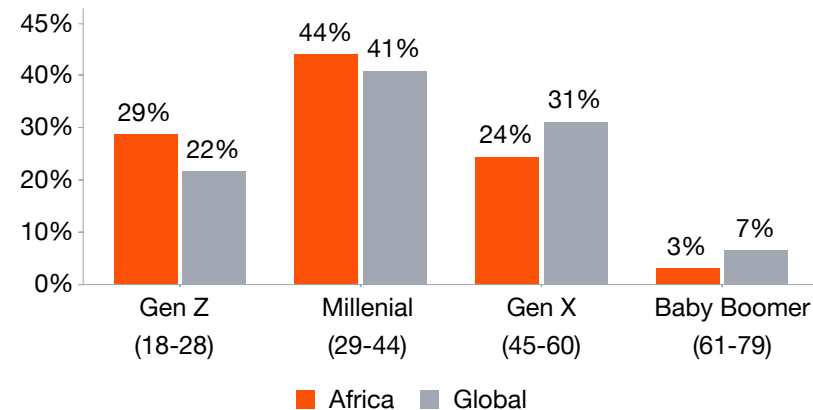
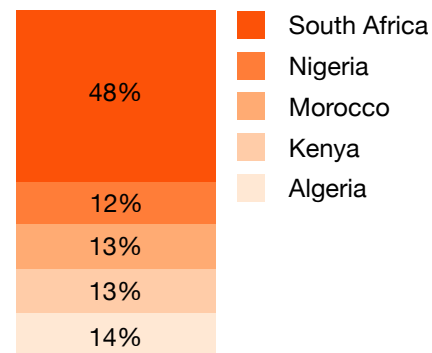
Key workforce shifts shaping Africa's future

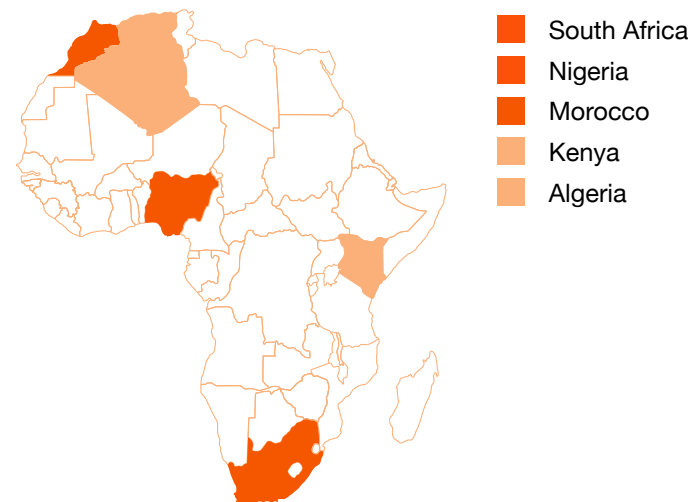
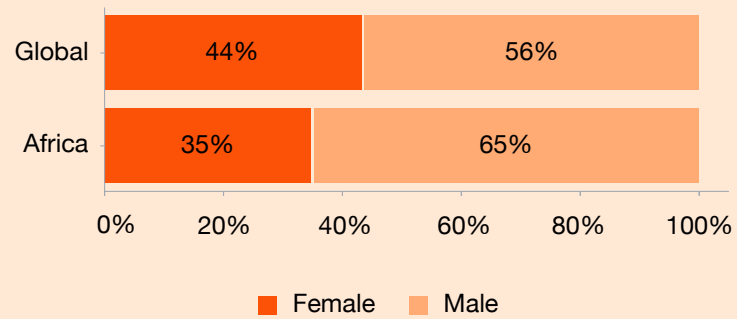
PwC's Global Hopes and Fears Survey engaged 49,843 workers across 48 countries and 28 sectors. In Africa, it surveyed 1,753 workers across five countries: Algeria, Kenya, Morocco, Nigeria, and South Africa in those same sectors.

PwC's Global Hopes and Fears Survey gathered 1,753 responses across Algeria, Kenya, Morocco, Nigeria, and South Africa—highlighting key workforce insights and emerging opportunities. Participation fell 12.35% from 2024's 2,000 responses—pointing to shifting engagement trends.

1. The workforce demographic demonstrates a predominantly young and energetic profile, with almost 75% under the age of 43—29% representing Generation Z (Gen Z) and 44% millennials.
2. Nearly two-thirds of respondents (65%) were male.
3. South Africa dominates responses with 48% of participants, with Algeria (14%), Kenya (13%), Morocco (13%), and Nigeria (12%) making up the rest.
4. Industrial Manufacturing (24%) and Government & Public Sector (21%) dominate, with Consumer Markets (15%) and Technology/Media/Telecommunication (13%) close behind.

Country





Key insights: Africa vs Global workforce trends

1

AI adoption in Africa

- **Weekly GenAI use growing:** The share of African workers using GenAI weekly has risen by 4% since 2024, yet most have never used AI agents, and only 17% use the technology daily.
- **Broader AI adoption:** 64% of African workers have used AI at work in the past year, compared to 54% globally.
- **Confidence in impact:** 76% believe GenAI improves work quality, and 72% expect productivity gains over the next three years with continued use of GenAI tools.

2

Skills growth and manager support

- African workers show 15% higher progress in skills-building and 6% more manager support than global peers.

3

Rising expectations drive plans for raises and career moves

- When thinking about a job that is a good fit for them, employees in Africa prioritise security, recognition, skill development, and positive relationships—placing these above autonomy and inclusion initiatives.
- Employees are increasingly prepared to act if expectations aren't met, with many considering internal or external moves. Looking ahead, nearly half plan proactive steps (45% intend to request a pay raise and 45% aim to seek a promotion), signalling rising expectations for both compensation and career progression.

4

Trust and purpose at work

- **Trust in management:** Over 55% of African workers trust management, 5% higher than the global average, with stronger confidence in direct managers than top leadership.
- **Meaning at work:** Two-thirds of African employees find meaning in their work, 10% above global peers. Among managers, the gap is even wider: 79% in Africa vs. 66% globally, underscoring leadership's role in fostering purpose and growth.

5

Job security and reskilling needs

- While most workers feel secure about their jobs in the short term, only 35% believe their current skills will remain relevant in three years, highlighting an urgent need for reskilling and upskilling.

6

Financial pressure remains high

- African workers saw slight financial improvement from 2024 to 2025, yet pressure remains above global levels.
- Only 32% of African households have money left for savings compared to 42% globally, while 47% can only cover bills with little or nothing left over versus 42% globally.



In Africa we surveyed 1,753 workers across five countries and 28 sectors.



With the future in motion, our Africa practices are evolving alongside it—embracing rapid workforce reinvention, accelerating digital adoption, and fostering a strong culture of continuous learning.

Theme	Observations and CEO insights
AI	<ul style="list-style-type: none"> Despite a recent decline in AI usage, African workers remain optimistic and feel empowered to embrace technology in their roles—outpacing global averages. CEOs are prioritising AI integration, but only a third are embedding it into their workforce strategy, highlighting a gap leaders must address.
Future-ready talent in Africa	<ul style="list-style-type: none"> Africa's strong learning culture and managerial support position the region to lead in workforce transformation, but CEOs highlight a gap in translating AI optimism into practical workforce strategy. Upskilling and digital literacy are critical for future growth. 56% of global CEOs report efficiency gains from GenAI, but only a third are integrating AI into workforce strategy. Leaders must bridge the gap between optimism and practical adoption. While most workers feel secure about their jobs in the short term, only 35% believe their current skills will remain relevant in three years, highlighting an urgent need for reskilling and upskilling.
Psychological safety	<ul style="list-style-type: none"> Women in Africa reported higher psychological safety than men, reversing global norms. Strong trust and openness create inclusive workplaces that fuel collaboration and innovation. CEOs are investing in wellbeing and inclusion to retain talent.
Skills relevance and job security	<ul style="list-style-type: none"> While most workers feel secure about their jobs in the short term, only 35% believe their current skills will remain relevant in three years, highlighting an urgent need for reskilling and upskilling. Leaders must prioritise continuous learning and adaptation. According to PwC's 28th Annual Global CEO Survey, more CEOs say they increased headcount as a result of GenAI investments over the last year than say they decreased headcount.
GenAI disruption	<ul style="list-style-type: none"> GenAI is expected to impact nearly half of roles across all levels (executives, managers, non-managers) in Africa within the next three years, signalling broad and uniform transformation.
Optimism and motivation	<ul style="list-style-type: none"> Key drivers for motivating the workforce indicates that there is a positive mood, strategic alignment, and psychological safety at workplaces with some areas of focus to improve on the change drivers, including technology, employer long-term goals, and changes with government regulations. Trust in management and opportunities also play a strong role.
Workforce priorities and intentions	<ul style="list-style-type: none"> Employees in Africa prioritise security, recognition, skill development, and positive relationships—placing these above autonomy and inclusion initiatives. 45% plan to ask for a pay raise, and 45% plan to ask for a promotion—indicating that half the workforce is focussed on financial growth while the other half is focussed on career growth.

Perceptions of change: How employees view AI and the future of work

02



The number of African workers using GenAI on a weekly basis has grown by 4% since 2024, yet most workers have never used AI agents, with only 17% using the technology daily

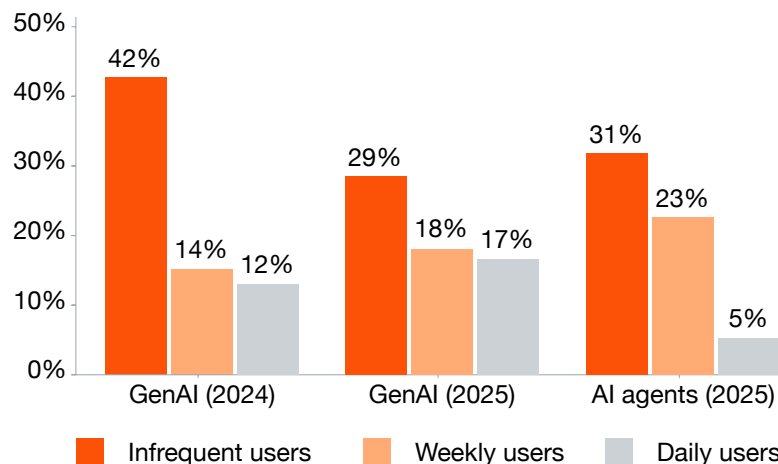
GenAI is revolutionising ways of work and transforming how employees create value, apply information, and deliver results at an unprecedented speed and scale.

However, widespread GenAI adoption in the workplace is still limited:

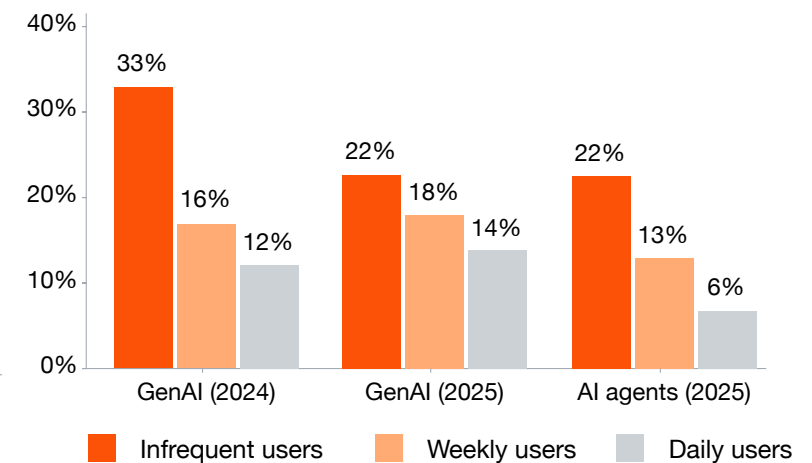
18% of workers in Africa report using GenAI tools, weekly, for work in the past 12 which is an increase from 2024.

Only 2,995 out of 49,843 employees, globally report using GenAI tools in daily work.

Share of worker GenAI and AI agent usage at work (Africa)



Share of worker GenAI and AI agent usage at work (Global)



GenAI refers to tools such as ChatGPT, DALL-E and so forth whereas AI agents refers to tools that can perform multi-step processes like scheduling a meeting with many participants with little human input.

64%

of African workers have used AI technology at work in the past 12 months

54%

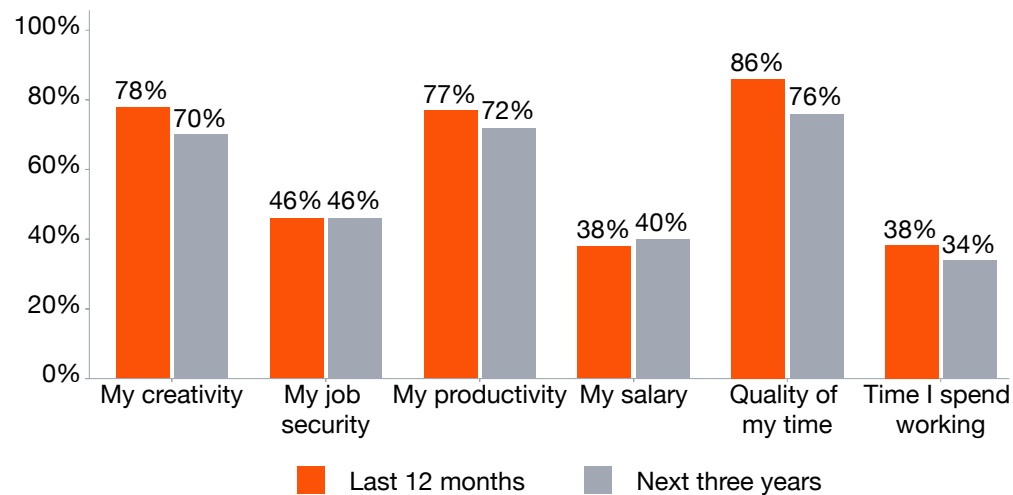
of Global workers have used AI technology at work in the past 12 months

AI has boosted job security and salary in the past year, and workers expect these benefits to continue in the next three years

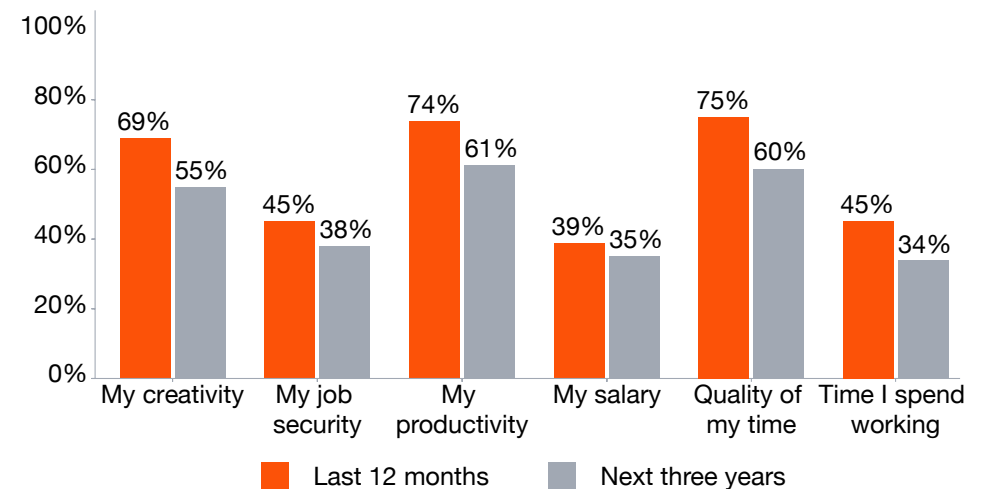
More than half of African workers surveyed (76%) are confident that the use of GenAI has increased their quality of work and 72% believe that their productivity will increase in the next three years with the use of GenAI tools. 34% of African respondents believe that GenAI will reduce their time spent working in the next three years.



Share of workers using AI in the last 12 months reporting/predicting increases in the following aspects of their job due to AI in Africa



Share of workers using AI in the last 12 months reporting/predicting increases in the following aspects of their job due to AI, Globally

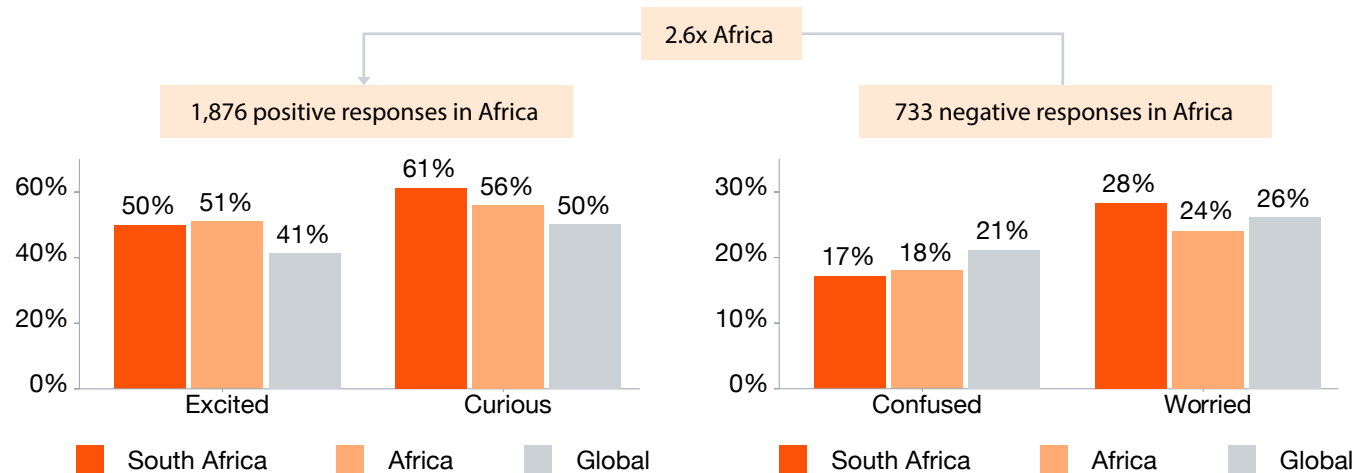


Who is feeling the most AI impact in South Africa?

- 91% of senior executives in South Africa who used AI in the last 12 months say AI has increased their quality of work, more than any other aspect and 82%, state that it will continue to over the next three years—compared to managers and non-managers, senior executives experience the highest sentiment.
- Millennials (74%) and Gen Z (73%) who used AI in the last 12 months report that AI has significantly improved their productivity, lower than Gen X (79%), but higher than Baby Boomers (67%).

Workers are twice as likely to feel positively about AI's impact on their work as they are to feel negatively

Share of worker positive and negative emotions about how AI may significantly affect their work



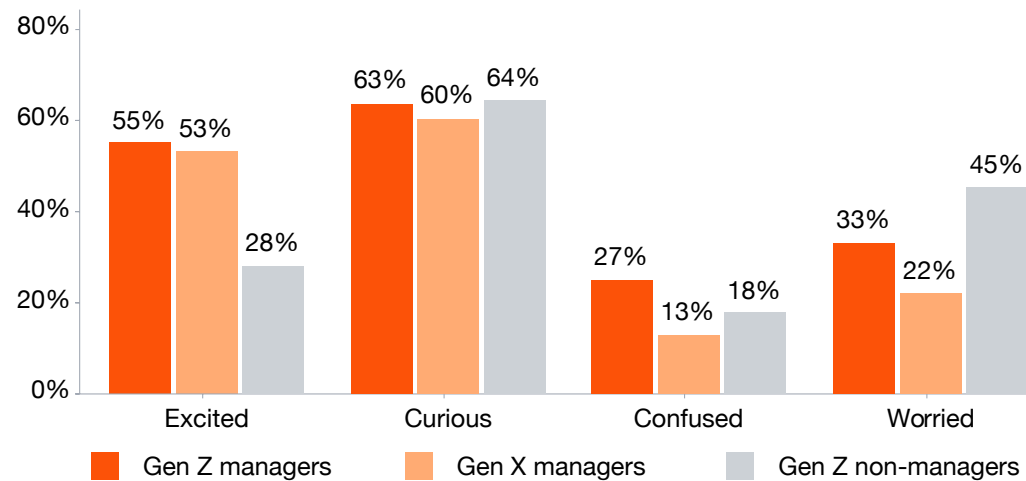
What is the workforce's attitude towards AI's impact?

- **Global:** Workers feel mostly excited (41%) and curious (50%), although the percentage is lower than that of Africa and South Africa, whereas the percentage of confused (21%) emotions are higher globally than that of Africa and South Africa.
- **Africa:** Workers feel more curious (56%) than excited (51%) in Africa yet feel more worried (24%) than confused (18%) regarding the impact of AI on their work.
- **South Africa:** Workers feel mostly curious (61%), reporting higher than that of the global and African view, however South Africans are also more worried (28%) compared to both the global and African view.



Workers in South Africa are mostly curious about AI's impact on their work and mostly feel positive about AI's impact on their work

Share of South African workers' positive and negative emotions about how AI may significantly affect their work



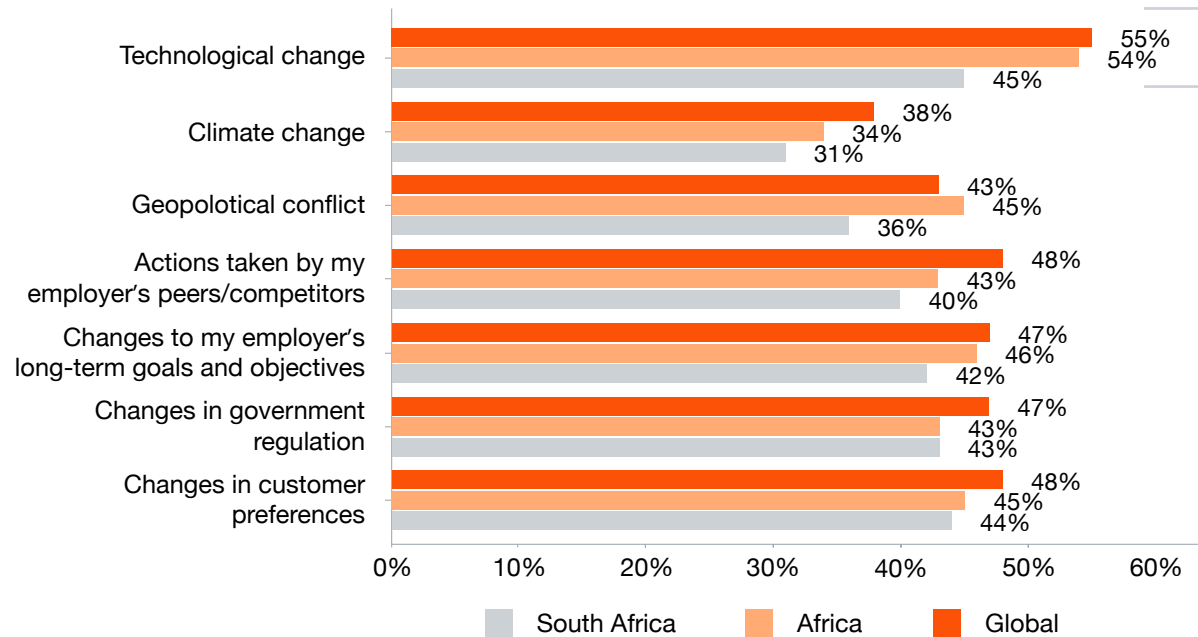
What is the workforce's attitude towards AI's impact in Africa and South Africa?

- **Gen Z:** Managers in South Africa are both excited and curious about AI, with 55% excited and 63% curious. Non-managers in South Africa tend to also lean positive with 64% curious, but also 45% worried, both being above the global average.
- **Gen X managers:** Confident and steady, reporting above-average positive emotions and below-average worry.
- Overall, the workforce seems to be mostly curious about how AI may affect their work.

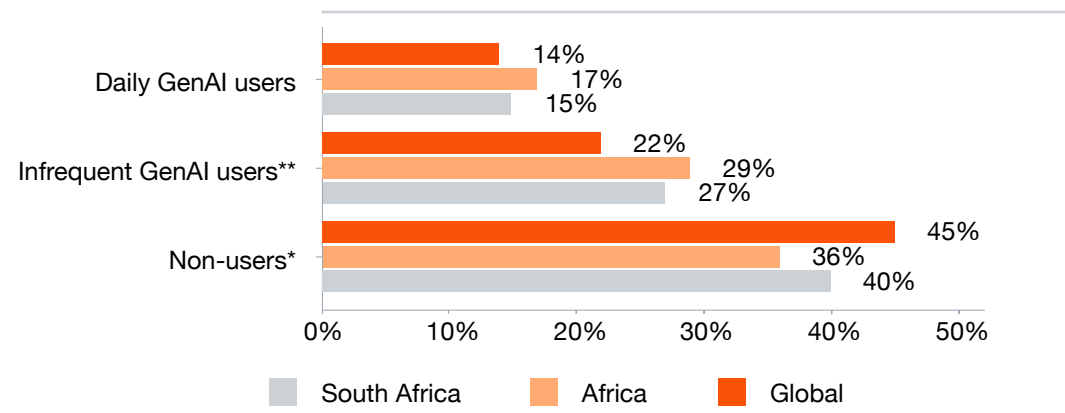




Share of workers who believe the below will impact their jobs in the next three years to a large or very large extent



More than half of workers in Africa see a major impact of technological change on their future jobs, compared with 17% and 15% for daily GenAI users in Africa and South Africa respectively



What will shape jobs?

- South African workers are 10% more aware of the technology impact, compared to the global average
- Overall, the workforce believes that technological change will have the most significant impact on their jobs
- Infrequent GenAI users are consistently more likely than daily GenAI users to experience a significant job impact from technological changes
- The expected impact of climate change on jobs is seen as the least likely impact in comparison to the other categories



In Africa almost five in every ten employees feel they have strong control over how technology affects their work, while 8% feel they have none

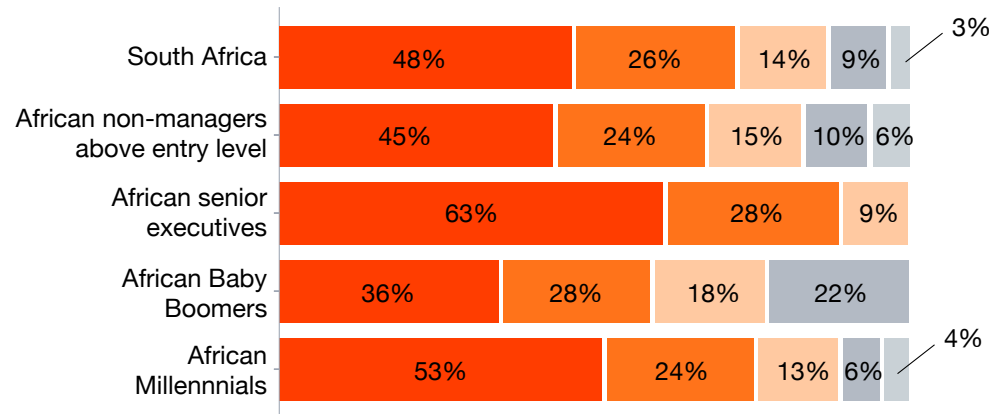
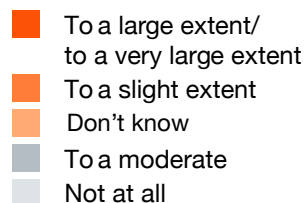
Share of workers' extent of expected control over the way technology will affect their work over the next three years in Africa



Share of workers' extent of expected control over the way technology will affect their work over the next three years, Globally



Breakdown of the share of African workers expectations

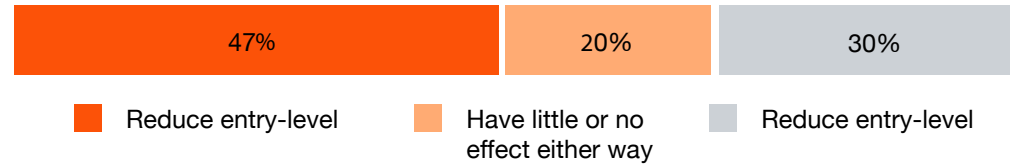


Who feels most in control in Africa?

- Millennials feel most in control (53%) and Baby Boomers least (36%) with 22% of Baby Boomers reporting no control, which is a larger proportion compared to the global average of 10%.
- Senior executives report the highest control (63%) with none feeling no control, while among non-managers above entry-level, 45% report high control in Africa.
- In South Africa 48% of respondents feel in control, while 9% feel as though they have no control at all.

Managers are uncertain about the impact of AI on entry-level jobs, while more than half of African senior executive workers expect AI to reduce the number of entry-level jobs

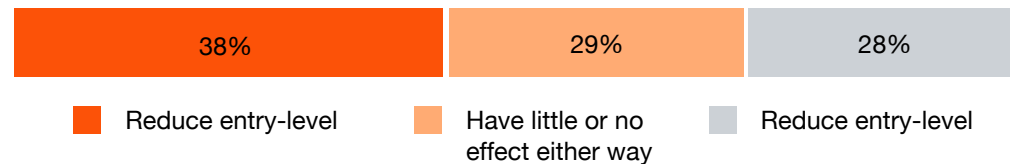
Share of managers' perceived impact of AI on entry-level roles over the next three years in Africa



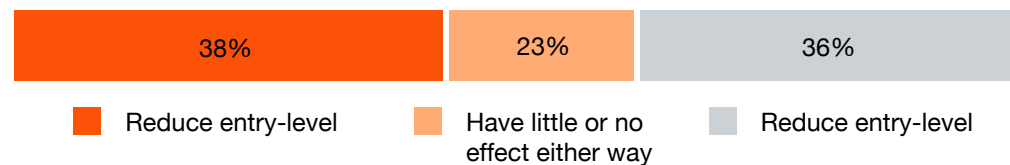
Share of senior executives' perceived impact of AI on entry-level roles over the next three years in Africa



Share of managers' perceived impact of AI on entry-level roles over the next three years, globally

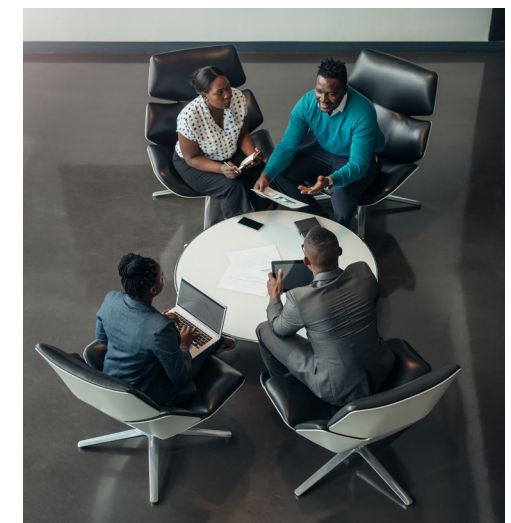


Share of senior executives' perceived impact of AI on entry-level roles over the next three years, globally



Who feels more certain about the impact of AI on entry-level jobs in Africa

- Senior executives in Africa feel strongly that AI will reduce the number of entry-level jobs (56%) in the African market, 18pp higher than that of global senior executives.
- Less than half of the managers in Africa (47%) feel that AI will reduce the number of entry-level jobs in the African market.



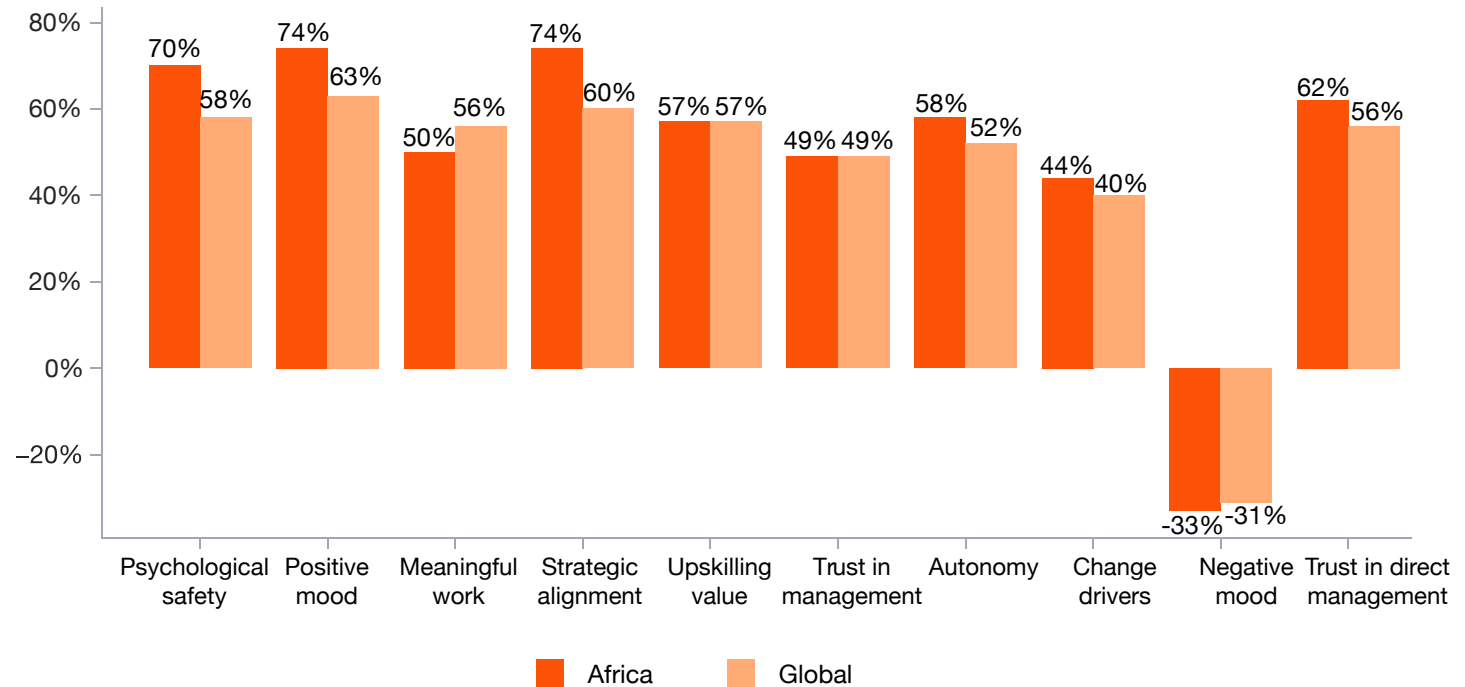
Key drivers to motivating the workforce of tomorrow

03



Positive mood and strategic alignment at work have the strongest impact on motivation

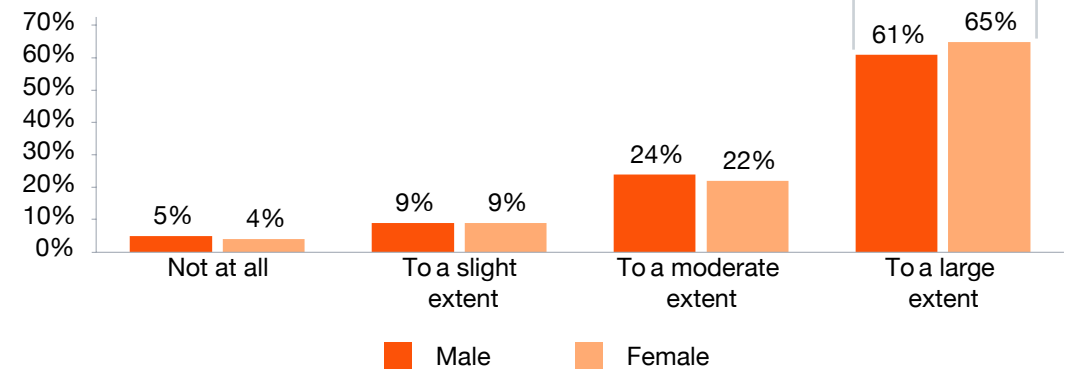
African workers are highly motivated compared to the global workforce by positive mood, strategic alignment, and psychological safety, while change drivers and negative mood remain the weakest influences



High optimism and job security in Africa contribute to worker motivation with a huge number of people who believe that their current jobs gives them job security

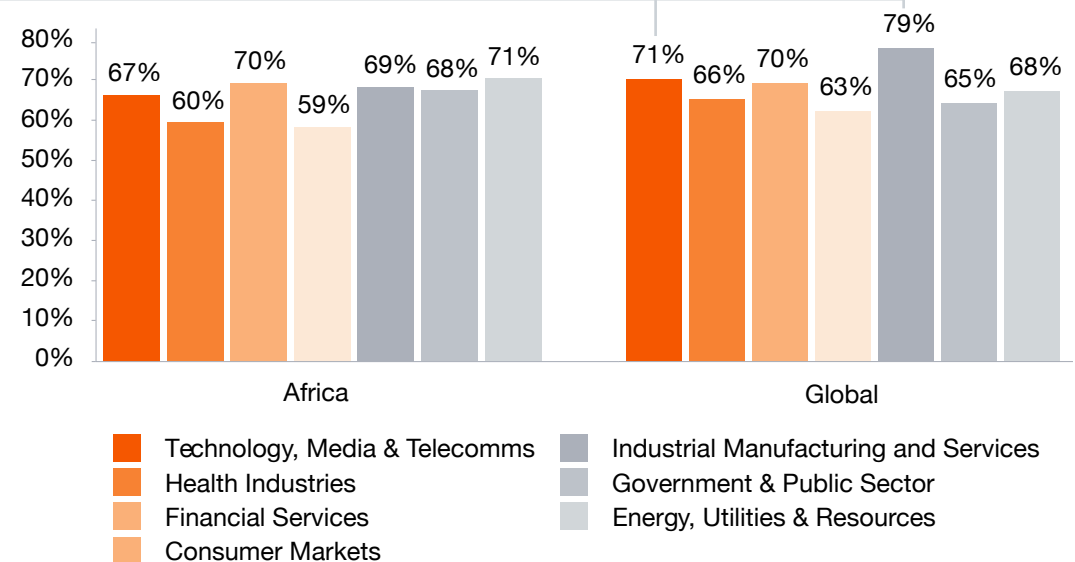
Optimism

65% of female workers in the African region demonstrate a high level of optimism regarding the future of their roles within their organisations. 61% of male workers report slightly lower levels of motivation.



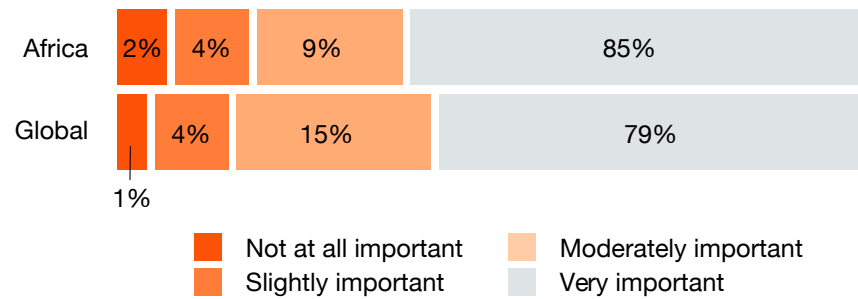
Job Security

Workers globally, from different industries, are more confident about their job security compared to Africa. The global industrial manufacturing and services sector reports 79% of workers are motivated and extremely confident about their job security (compared to 69% in Africa) while in the global technology, media, and telecommunications sector reports 71% (compared to 67% in Africa).



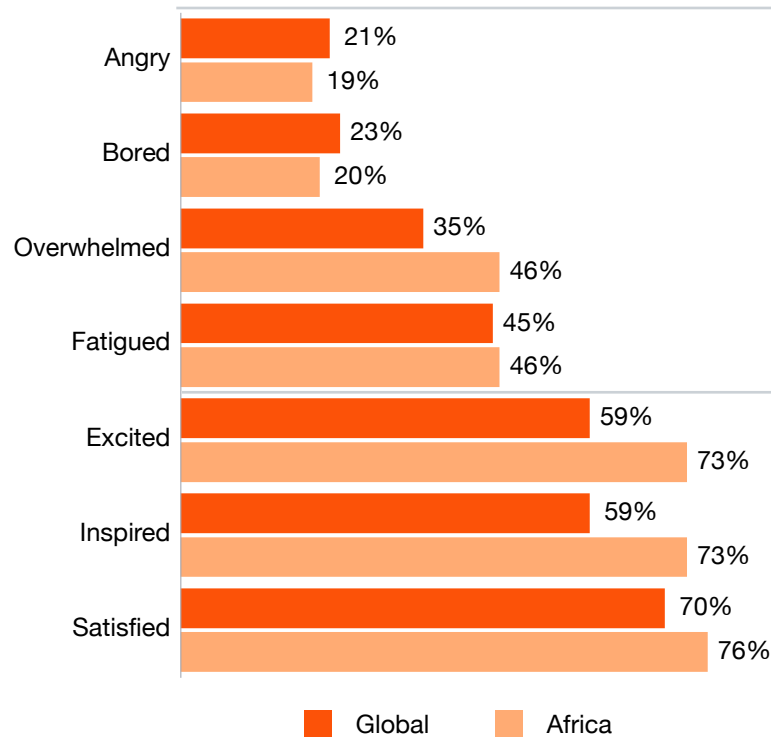
Job Preference

85% of workers in Africa believe that their current job provides them reasonable job security compared to those globally, which indicates 79% who feels the same.

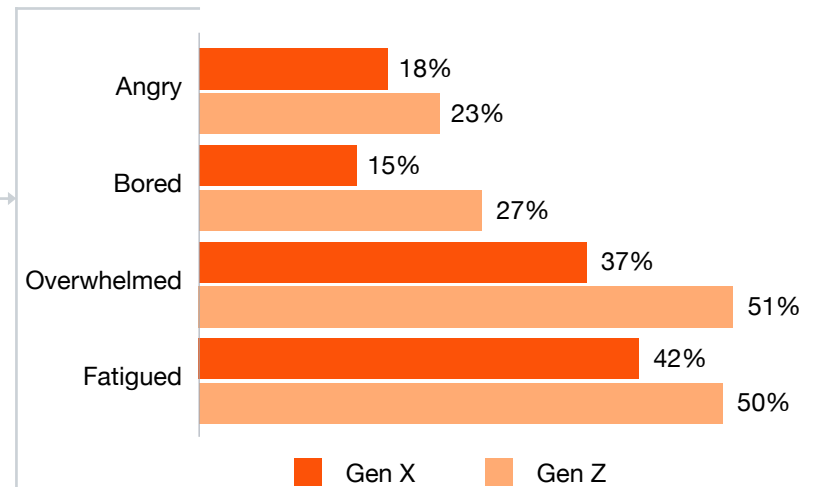


More workers in Africa feel positive emotions like satisfaction, inspiration, and excitement than globally, but a significant share experiences fatigue and feeling overwhelmed, especially among Gen Z compared to Gen X in Africa

Share of workers who feel the following emotions at least once a week

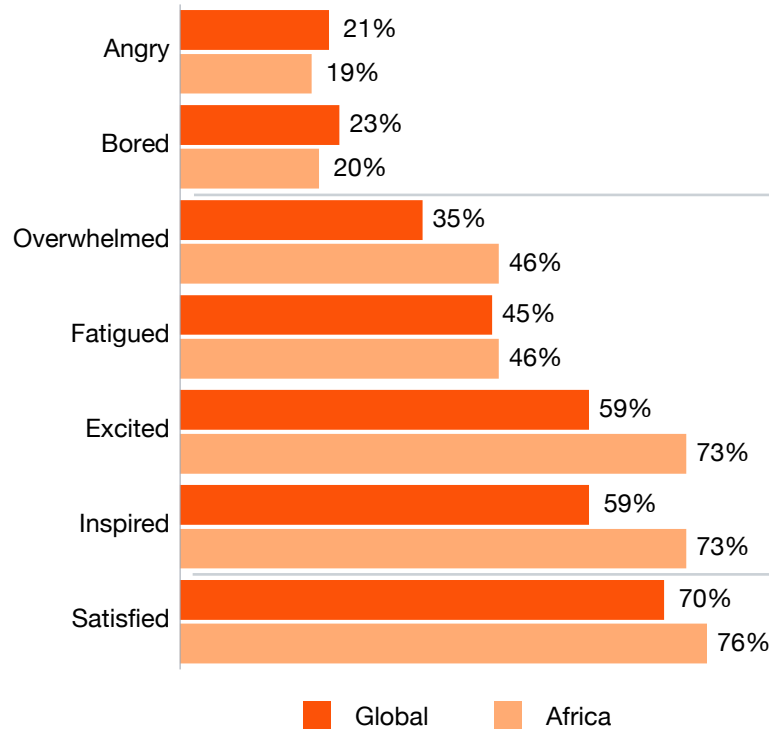


Share of workers in Africa who feel the following emotions at least once a week, by generation

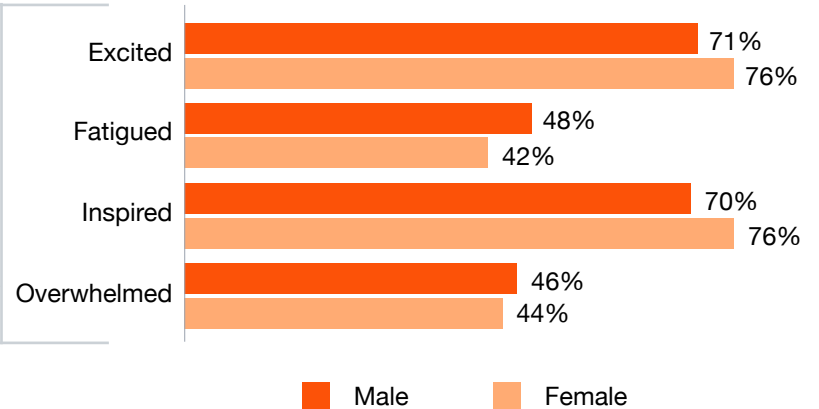


Workers in Africa and globally report frequent positive emotions like satisfaction and inspiration, while gender differences show women feeling more inspired and excited, and men slightly more fatigued and overwhelmed.

Share of workers who feel the following emotions at least once a week



Most significant mood by gender



While most workers feel confident about job security, 30% of workers believe their current skills will stay relevant, as GenAI is projected to impact nearly half of roles across all levels in Africa

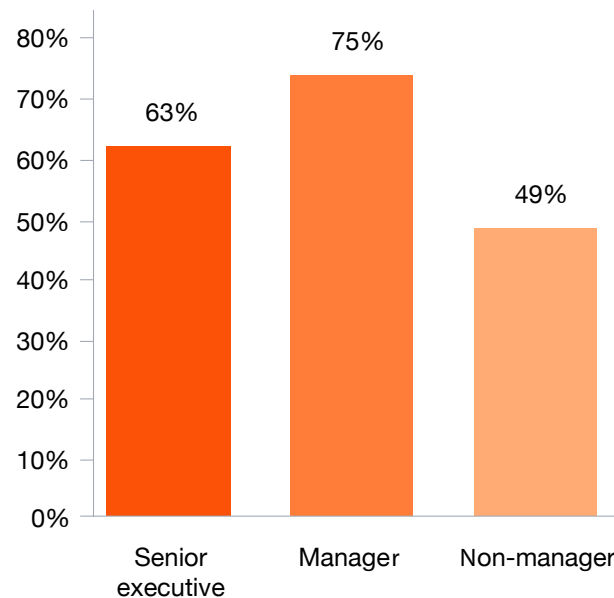
35%

of workers believe that at least more than half of their skills today will be relevant in three years' time.

64%

of workers are very confident or extremely confident in their job security over the next 12 months.

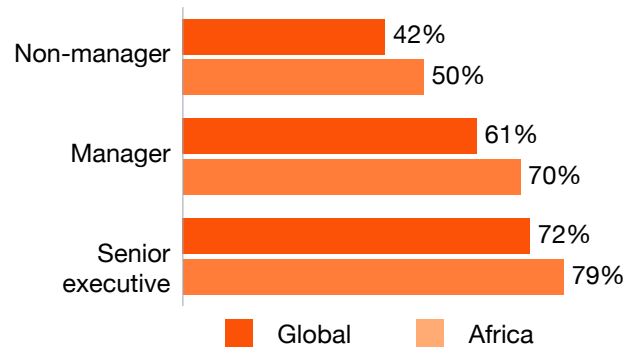
Share of how technological change, including GenAI and robotics, will impact roles for African workers over the next three years



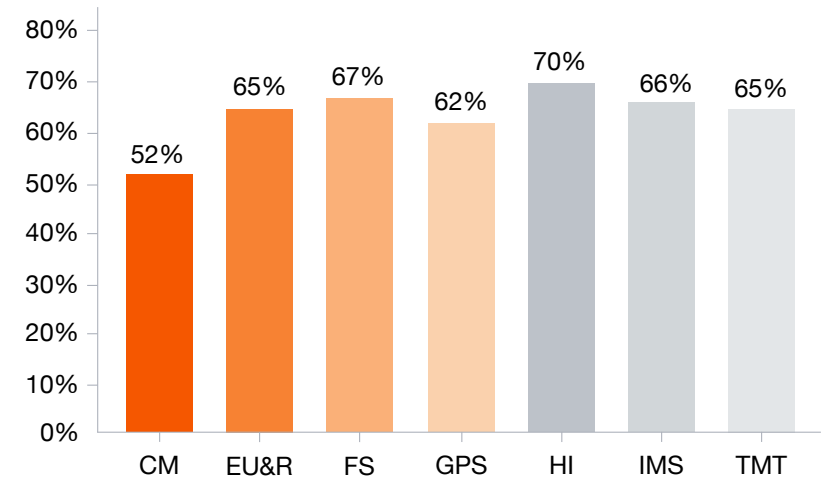
Many African workers remain unaware of the potential impact of emerging technologies, including GenAI, on their roles. While AI is expected to affect nearly 50% of jobs, 64% of workers still express confidence in their job security.

African workers are more optimistic about their roles than global peers, especially senior executives and those in healthcare-related industries.

Share of workers feeling optimistic about the future of their role within the organisation, by seniority



Share of workers feeling optimistic about the future of their role within the organisation, by industry*



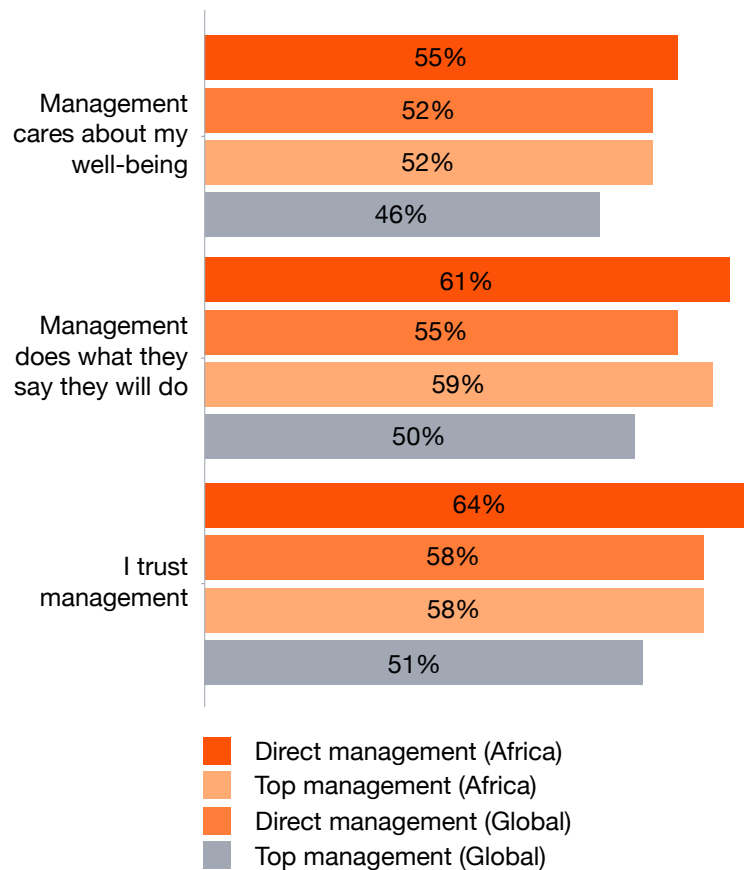
- Industrial Manufacturing (IMS)
- Government & Public Sector (GPS)
- Consumer Markets (CM)
- Technology, Media & Telecom (TMT)
- Financial Services (FS)
- Health Industries (HI)
- Energy, Utilities & Resources (EU&R)



Trust in management among African workers is above 55%—5% above the global average—with greater confidence in direct management than top management

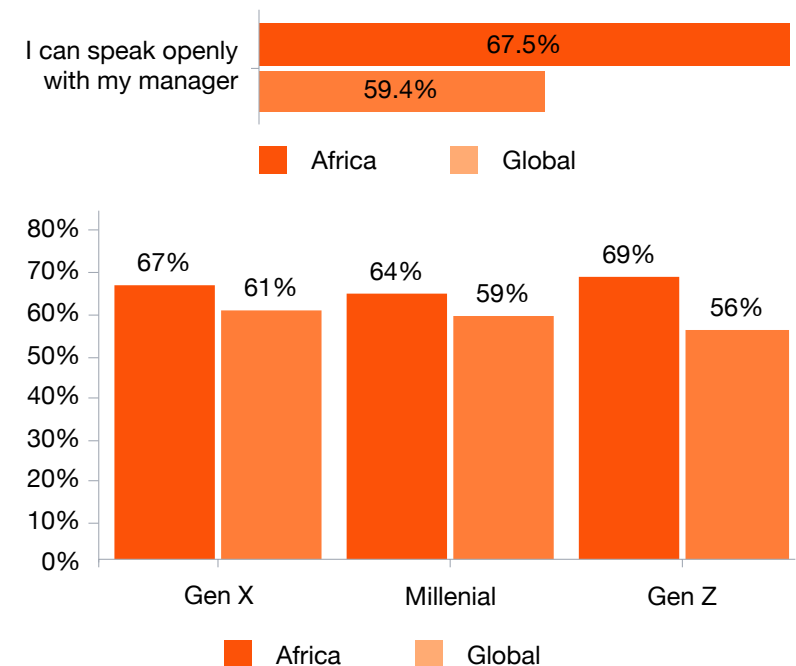
South Africa leads the region exceeding 60% across all measures. Gen Zs report the lowest comfort with open dialogue, while millennials are among the most comfortable.

Worker trust in management: Africa vs Global comparison



Who doesn't trust management?

- Managers have significantly higher trust in both direct and top management than non-managers.
- Trust in direct management differs by territory and industry:** lowest in Algeria and Consumer Markets, highest in Kenya and Financial Services.
- Government and public sector had the third highest trust in management.



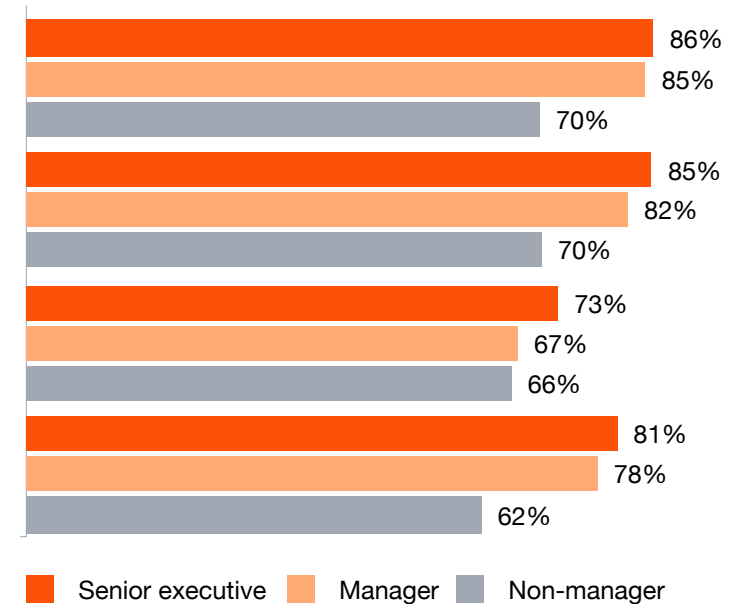
Employees in Africa report significant stronger alignment with their organisation's long-term goals compared to their global peers

In Africa, strategic alignment is strongest among senior executives and managers, but non-managers also show robust alignment, well above global averages—indicating a deep organisational connection at every level

Share of worker agreement about their strategic alignment



Share of worker agreement about their strategic alignment, by seniority

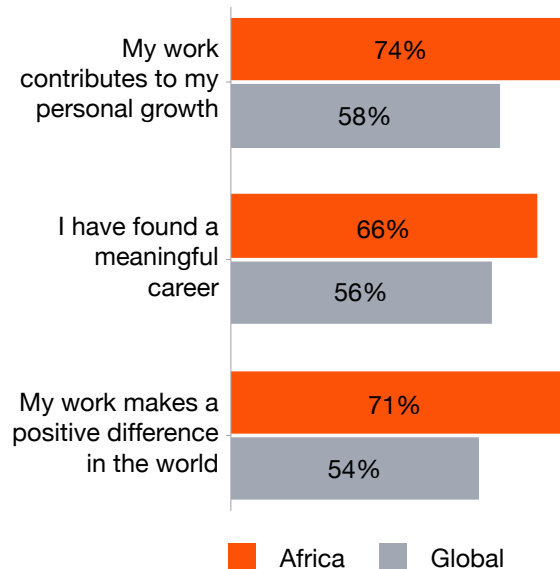


Africa's workforce demonstrates a clear and consistent connection to organisational strategy, outpacing global averages. Leaders should leverage this alignment to accelerate transformation, empower teams, and facilitate knowledge sharing—embedding the long-term vision throughout the enterprise and ensuring strategic goals are understood and embraced at every level.

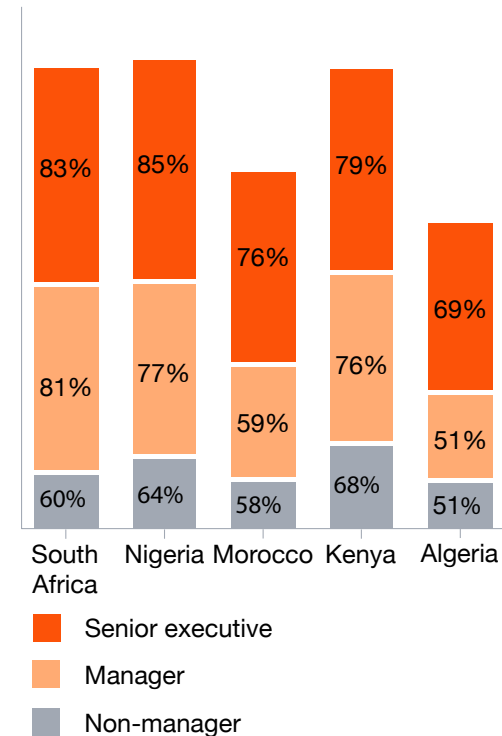
African workers report significantly higher progress in acquiring new skills, 15% above global peers—reflecting a region focused on future-ready talent and continuous learning

Non-managers lag globally, but Africa shows a clear edge: more learning opportunities, greater support, and faster capability building across all levels.

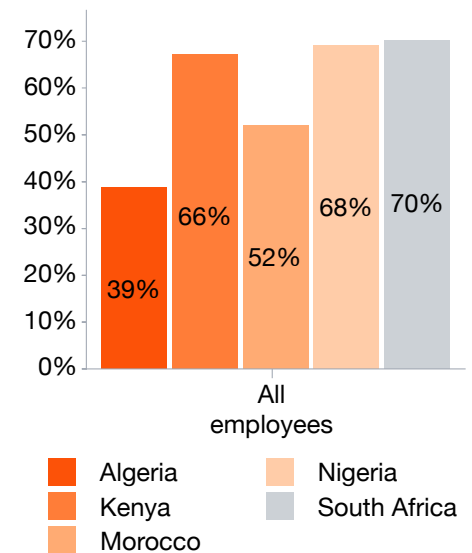
Share of worker agreement about upskilling opportunities at work



Share of worker agreement about access to L&D resources needed at work by role



South Africa leads the region with 70% of workers reporting that their manager supports them in building new capabilities.

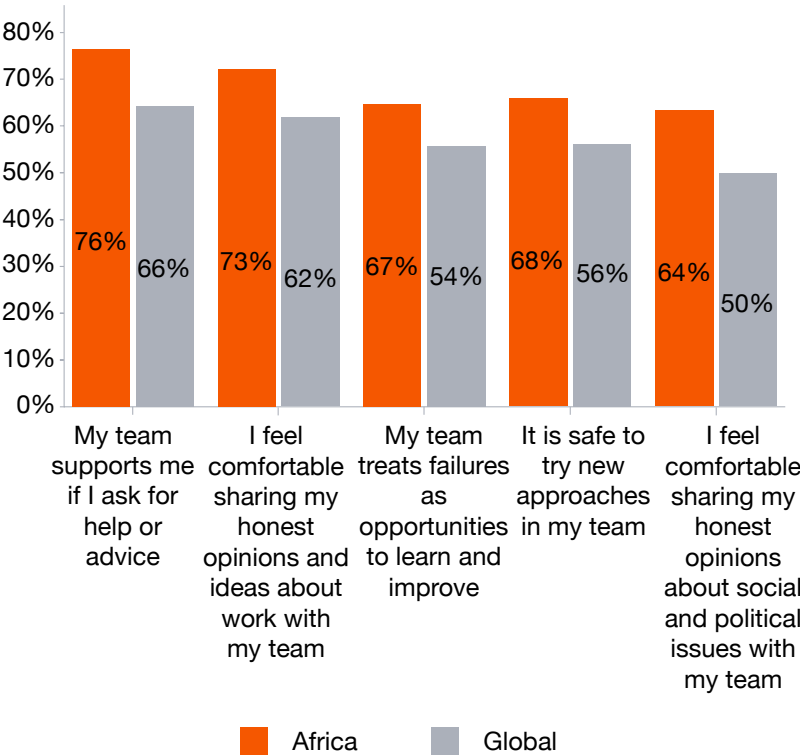


Leaders should double down on upskilling and capability building, ensuring that learning opportunities and manager support are accessible to all employees—especially non-managers who may lag behind.

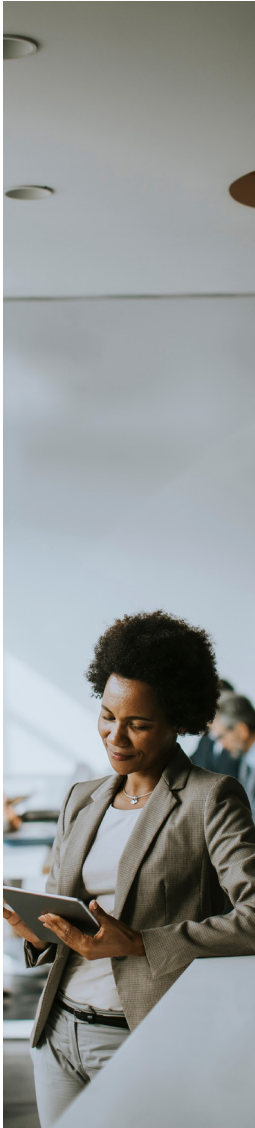
Africa’s psychological safety advantage: A catalyst for team performance and innovation

Africa outperforms global peers on every measure of psychological safety, with women leading the way—reversing global trends

Share of worker agreement about their level of psychological safety at work



Women in Africa consistently score higher on psychological safety than men—reversing global norms.



Africa (percentage point difference)		
Female	%	Male
79	+3	76
75	+3	72
71	+6	65
72	+6	66
64	+1	63

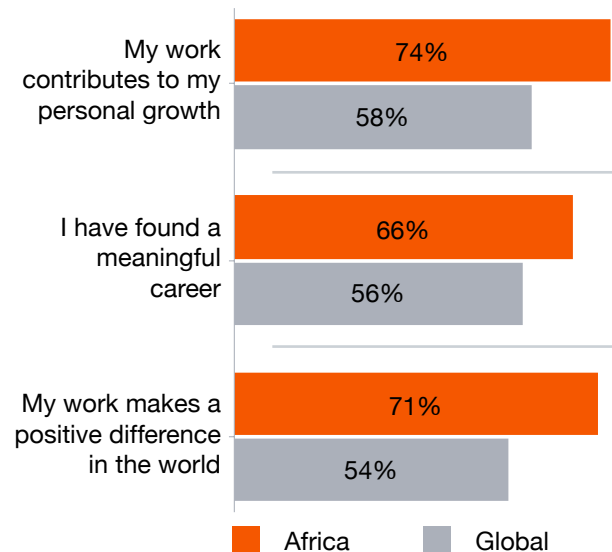
Global (percentage point difference)		
Female	%	Male
53	-2	55
65	-1	66
54	-3	57
59	-5	64
47	-5	52

Two-thirds of African employees report finding meaning in their work, 10% higher than global peers. Among managers, the gap is even wider: 79% in Africa versus 66% globally, highlighting the role of leadership in fostering purpose and growth



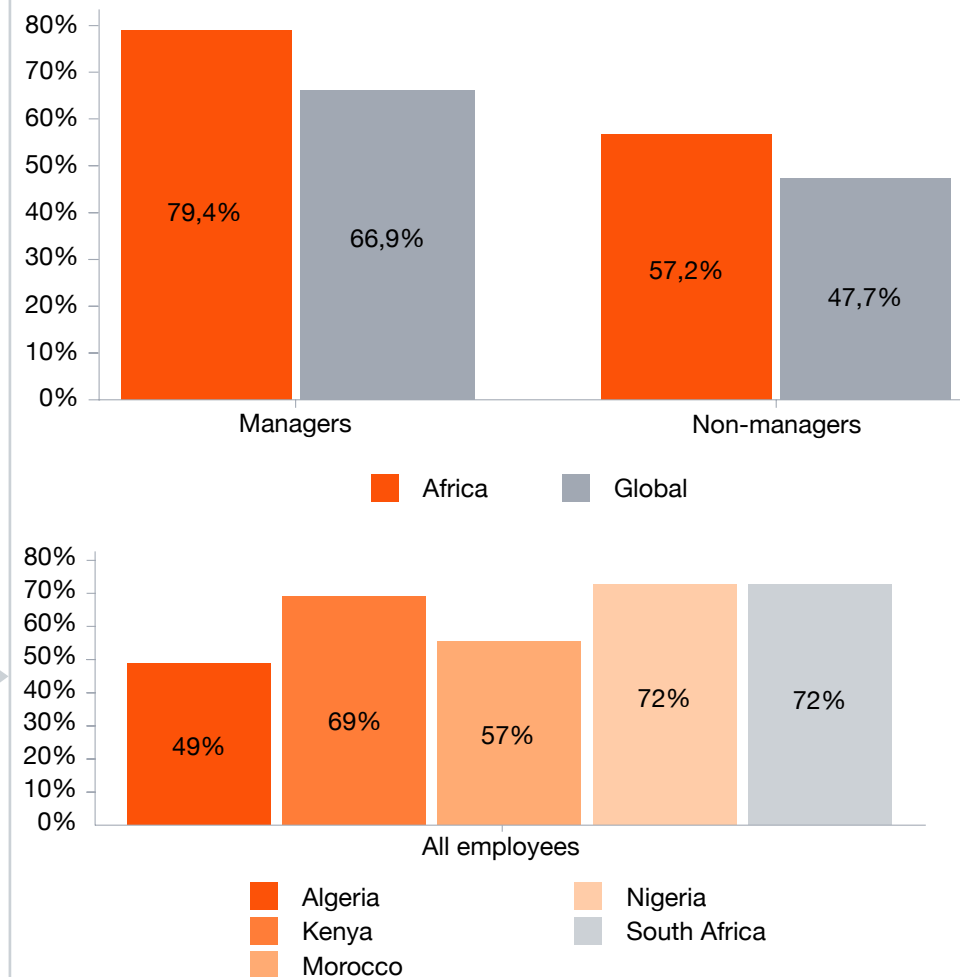
From personal growth to making a difference, African workers report higher levels of purpose at work, underscoring the importance of leadership and learning opportunities in shaping fulfilling careers.

Share of worker agreement about the meaning they find in their work



Who finds meaning in their work?

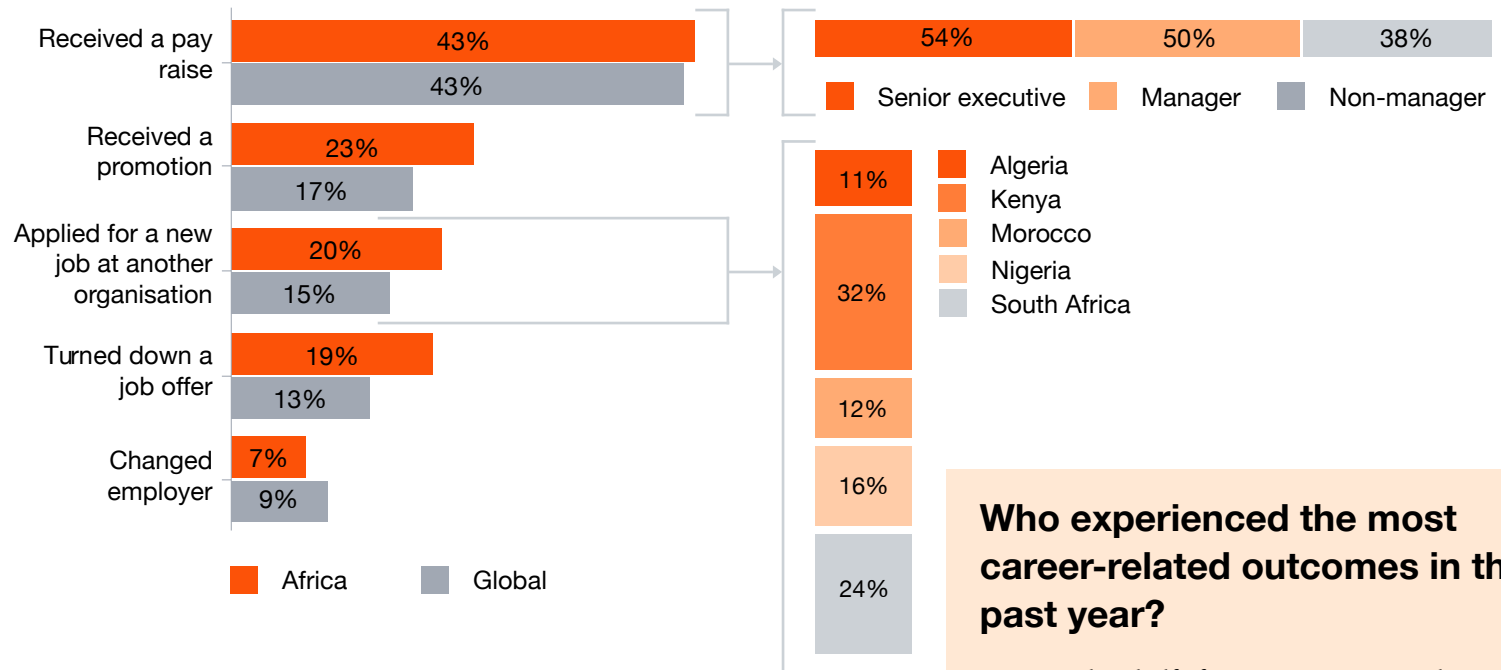
- Managers are +22pp more likely than non-managers to feel they have a meaningful career.
- Who has a meaningful career differs by region and industry: lowest in Algeria and Consumer Markets, highest in Nigeria and the Healthcare Sector.



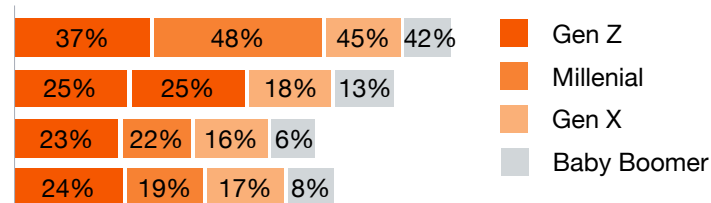
Fewer than half of employees received a raise or promotion in the past year; raises and promotions were most common among Millennial workers

Millennials and Gen Z drive upward mobility, with South Africa leading global job market activity.

Share of the following outcomes that happened to workers within the last 12 months



Share of career related outcomes in the past year by generation

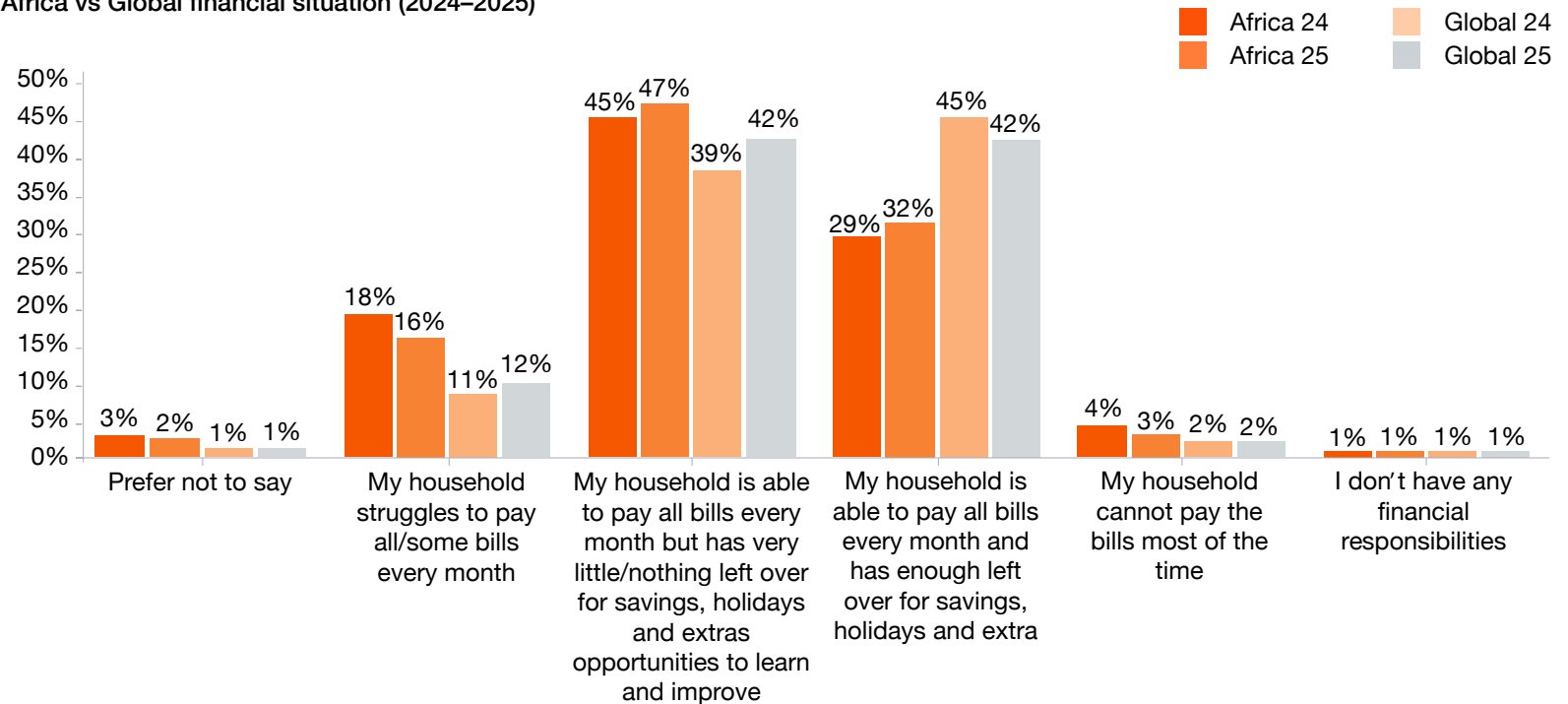


Who experienced the most career-related outcomes in the past year?

- More than half of senior executives and managers received a salary increase, highlighting leadership's advantage in compensation growth.
- Gen Z were the least likely to receive a pay rise (37%), yet they stood out for confidence and selectivity—24% turned down a job offer, the highest among all generations.
- Millennials and Gen Z led in upward mobility, with one in four respondents (25%) earning a promotion during the year.
- Kenyan and South African respondents were highly active in the job market 32% and 24% applied for a new role, well above global average.

African workers reported marginally improved financial situations from 2024 to 2025, but financial pressure remains higher than global averages.

Africa vs Global financial situation (2024–2025)

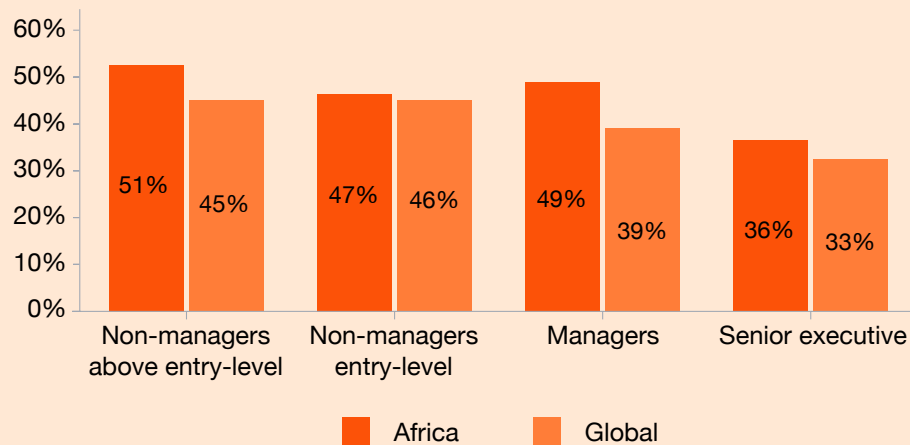


How has workers' financial situation changed in the past year?

- Improved financial stability in Africa with households able to pay bills with leftover for savings increased from 29% (2024) to 32% (2025).
- Those struggling to pay bills dropped from 18% to 16%.
- Households unable to pay bills most of the time decreased from 4% to 3%.
- Africa has fewer households with leftover for savings (32%) compared to global 42%, as well as more households only able to pay bills with little/no left over 47% vs 42%.
- Financial strain (struggling to pay bills) remains higher in Africa (16%) than globally (12%).

Financial constraints are most pronounced among mid-level professionals in Africa

Share of workers who can pay bills, but little or nothing left for savings or extras.



How has workers' financial situation changed in the past year?

- Managers in Africa show a significant gap compared to global peers, with 49% reporting limited financial flexibility versus 39% globally.
- Non-managers above entry-level report the highest proportion overall, with 51% in Africa compared to 45% globally, highlighting elevated financial pressure beyond entry-level roles.
- Entry-level non-managers in Africa and globally experience almost the same level of financial pressure, with 47% and 46% respectively, showing virtually no regional difference at this level.
- Senior executives in Africa report slightly higher financial pressure than their global peers, with 36% indicating limited flexibility compared to 33% globally.

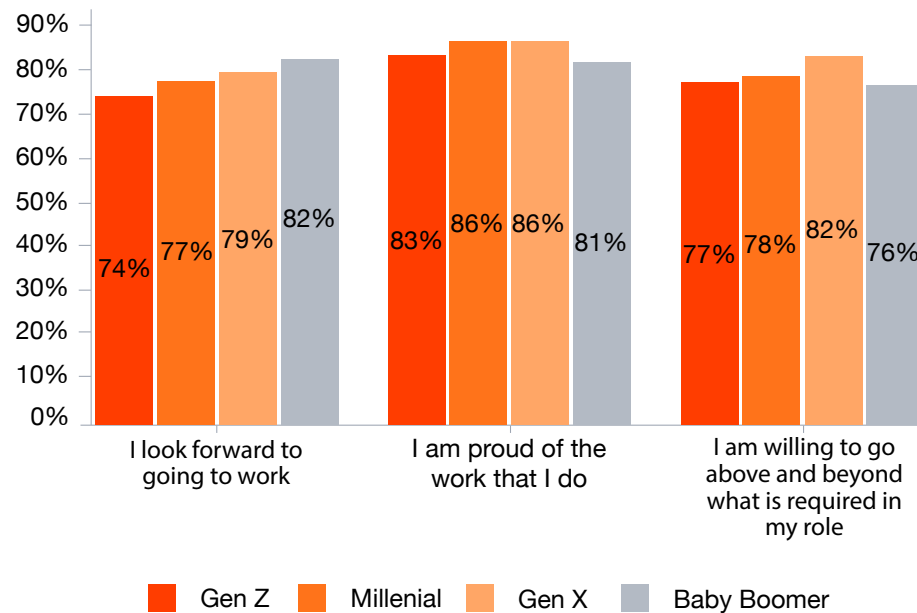
04

Further findings



Younger workers in Africa remain less enthusiastic about the traditional work environment, signalling a need for flexible work models, purpose-driven roles, and career development opportunities to boost engagement

Share of workers who feel the following about their job at least once a week, by generation:



Across all generations, pride in the work they do is the strongest sentiment, with Gen X and Millennials leading at 86%, followed closely by Baby Boomers (81%) and Gen Z (83%).

Millennials (78%) and Gen X (82%) are most likely to go beyond their role requirements, while Baby Boomers (76%) and Gen Z (77%) lag slightly.

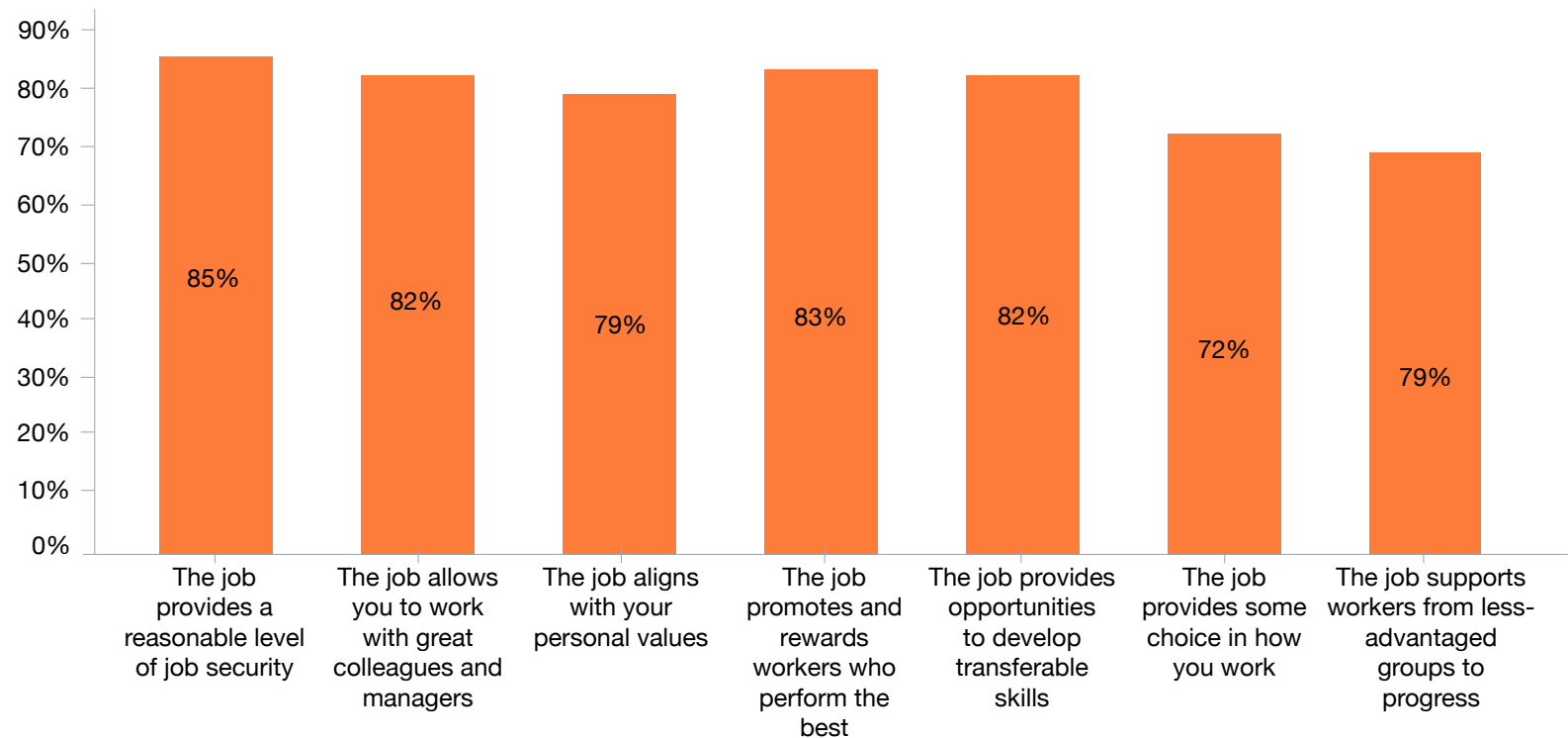
Gen Z's relatively lower scores across all dimensions suggest shifting expectations: They value meaningful work, flexibility, and well-being over traditional loyalty.

Employers should tap into Millennials and Gen X for leadership and innovation initiatives, while creating incentives and recognition programmes to motivate Gen Z and Baby Boomers.



Employees in Africa prioritise security, recognition, skill development, and positive relationships over autonomy and inclusion initiatives

Question: When thinking about a job that is a good fit for you, how important is each of the following?

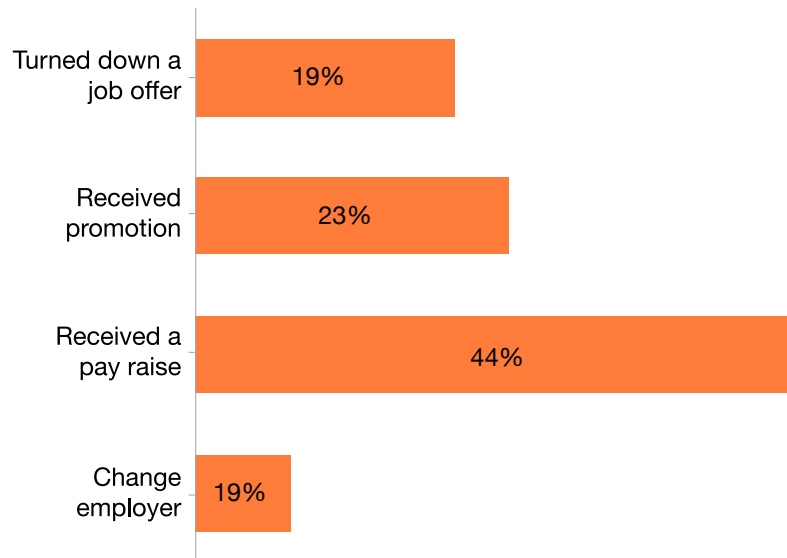


What does this mean?

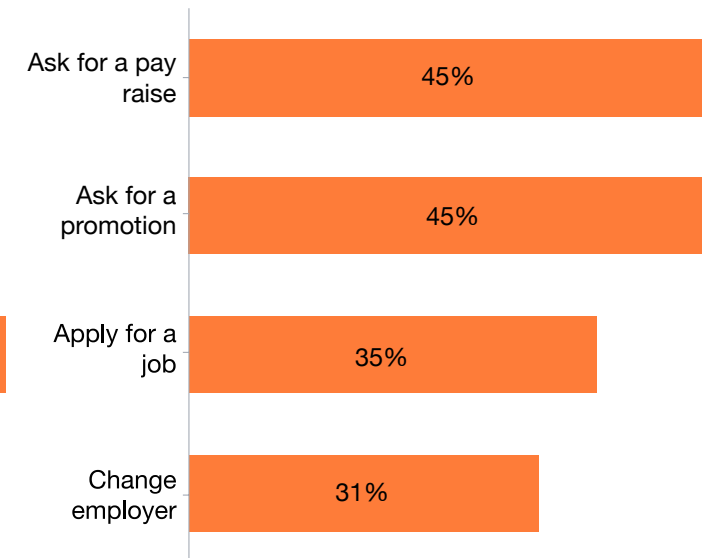
- Stability is the most critical factor for employees when assessing job fit. Uncertainty in tenure significantly reduces attractiveness.
- Employees expect clear reward systems and opportunities to develop transferable skills, signalling the need for structured performance management and career development frameworks.
- Positive interactions with colleagues and alignment with organisational values strongly influence engagement and retention.
- While flexibility and diversity initiatives remain relevant, they are secondary motivators compared to security and growth.

Future intentions show a shift: 45% plan to ask for a pay raise, and 45% plan to ask for a promotion, indicating growing employee expectations for both pay and career progression.

Past outcomes



Future outcomes



What does this mean?

- Employees are actively planning moves (internally and externally) if expectations are not met.
- Career progression is now as critical as pay.
- There is a rising need to build structured growth pathways, competitive pay strategies, and strong internal mobility programmes to prevent attrition.
- With more employees considering external roles, positioning as a growth-oriented employer is essential to stay competitive.

Growth and upskilling	Tech-enabled transformation	Human experience
<p>Prioritise future-ready talent through upskilling and strategic support</p> <ul style="list-style-type: none"> Upskill and reskill continuously: Build on PwC's existing mandatory digital training modules (for example Digital Lab Immersion, Digital Academy, GenAI playlists, and annual Digital Audit Academy) to ensure all staff are equipped for emerging technologies and new domains of growth. Align talent strategies with emerging domains of growth: Leverage PwC's Talent Marketplace and cross-domain rotations to develop expertise in growing sectors Create transparent career pathways and internal mobility programmes: Use PwC's internal mobility platforms and career coaching to make career moves visible and accessible, supporting rapid reinvention. 	<p>Harness AI optimism while managing role disruption</p> <ul style="list-style-type: none"> Integrate AI into workforce strategy: Bridge the gap between AI optimism and practical workforce strategy by embedding AI into planning and operations. Deploy and expand PwC's AI-powered tools (Halo, Digital Lab) to automate processes and free up staff for higher-value work. Prepare for GenAI disruption: Develop strategies to manage the impact of GenAI on roles across all levels, ensuring employees are equipped to adapt to technological changes. Scale up the GenAI Centre of Excellence and pilot projects to identify roles most impacted and reskill teams for new service offerings. Leverage positive sentiment: Use the strong optimism towards AI to drive innovation and integration within the organisation. Host "AI Innovation Days" and showcase client solutions built with GenAI, rewarding adoption through recognition programmes. 	<p>Build trust, psychological safety, and meaningful work environments</p> <ul style="list-style-type: none"> Strengthen a culture of trust: Build on existing trust by fostering open communication and inclusivity. Create spaces where every employee feels safe to share ideas and challenge assumptions without fear of judgment. Continue regular "Voice of the Employee" pulse surveys and "Speak Up" campaigns, with transparent follow-up actions from leadership. Advance psychological safety: Deepen the commitment to psychological safety—especially for underrepresented groups—by embedding practices that encourage collaboration, innovation, and respectful dialogue across all levels. Address career expectations by making progression as critical as pay: Continue to publicise internal promotions, offer "stretch assignments" on strategic projects, and provide career coaching aligned to new domains of growth.
<p>Why this matters: Anticipating megatrends and building future-ready capabilities is central to Value in Motion. By leveraging PwC's digital training and talent mobility, leaders enable rapid reinvention as value pools shift across industries.</p>	<p>Why this matters: Leading Edge calls for bold, tech-enabled strategies. Embedding AI and preparing for GenAI disruption positions PwC and its clients to act decisively, convert disruption into measurable advantage, and stay ahead in a multi-shock world.</p>	<p>Why this matters: Value in Motion emphasises trust and human experience as foundations for sustainable transformation. By fostering psychological safety and transparent career progression, leaders build "trust architectures" that support reinvention and stakeholder confidence.</p>



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