

Hybrid 2.0

The next-gen work model is here to stay

An e-commerce sector perspective

People Advisory Services

June 2021

The EY logo consists of the letters 'EY' in a bold, white, sans-serif font. A yellow diagonal bar is positioned above the 'Y'.

Building a better
working world

Hybrid 2.0

The next-gen work model is here to stay

Organizations have successfully adopted remote work models to ensure business continuity in unprecedented times.

However, as we strive towards a new **equilibrium**, stabilizing after the second wave of the pandemic, there is an opportunity to **fundamentally reimagine** our workforce and workplace strategies.

Future focused e-commerce organizations are taking a lead in **deliberately designing a sustainable hybrid work model** that will enable them to optimize their service delivery, expand customer reach and overhaul their existing talent landscape, in expected and unexpected scenarios; thereby adding to their competitive edge.

Market leaders will transform, others will *transition*.



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Partner quotes



Ankur Pahwa

Partner & National Leader -
Ecommerce & Consumer
Internet, EY

“

The surging post-pandemic digital economy has ignited a battle for retaining and recruiting employees and companies will need to define strategies to compete for top talent and manage a hybrid workforce, to build and sustain high-growth companies.



Neha Sharma

Partner - People Advisory
Services, EY

“

There is no 'one-size-fits-all approach' for bringing employees back to work. Companies are testing which strategy fits best for their business, culture, and long-term success. There is substantial value to be unlocked via the right hybrid workforce model.



Chapter 1

Context and introduction

The needs of people, employees and customers have been and continue to be dramatically reshaped by the pandemic. The e-commerce industry is riding the wave of change, transforming itself to retain competitiveness in the new world order.

E-commerce in India is a sunrise sector on a steep trajectory of growth. Expanding at a CAGR of 27%, the industry is poised to reach US\$99 billion by 2024. India is expected to surpass the US to become the second-largest e-commerce market in the world by 2034¹.



27%

CAGR will propel the e-commerce sector in India to reach US\$99 billion by 2024¹

While most other industries have weathered severe business challenges over the last year, the e-commerce sector in India has seen increased innovation and rise of entrepreneurial ventures, heightened funding activity, policy enablement and consequent upswing in hiring. These positive traits help to hold the sector in good stead while the nation battles with a far more potent and widespread second wave of the pandemic.

There has been a very resilient response from the industry; specifically, sub-sectors like health-tech, ed-tech, hyperlocal, fin-tech, insurance-tech, gaming and social have seen significant growth in business volumes and enhanced market penetration.

The last one and a half year has also massively accelerated the growth of digital businesses and the ecosystem of digital consumers. E-commerce frontrunners have been able to capitalize on this opportunity.

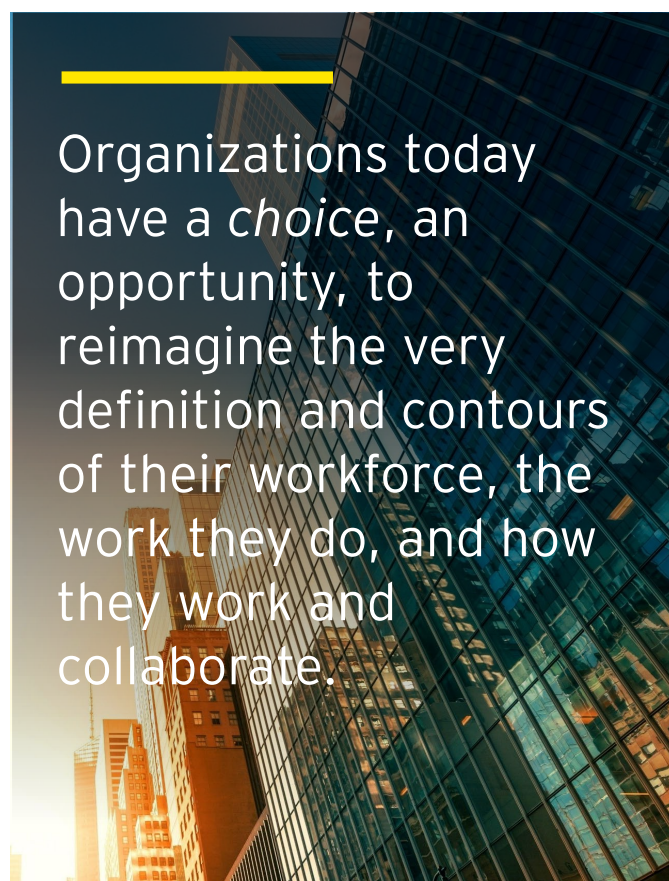


37%

Consumers globally believe the way they shop will change over the long-term²

While most e-commerce organizations have experimented with remote work models, as the world strives towards a new equilibrium, organizations have an option to revert to pre-pandemic ways of working or choose to consciously modify and adopt a hybrid working model. There is no single “best fit” model that can be replicated by all organizations, but a “fit for purpose” model that needs to be evolved by every organization basis its own unique DNA. The dynamism in all our professional and personal lives, as forced by fresh waves of the pandemic, makes hybrid work one of the most important business problems to be addressed.

For true value of hybrid work models to be unlocked for all stakeholders involved (from investors to leaders to employees), a strategic lens is needed to assess the various decision parameters and design a hybrid 2.0 model which best fits the organization’s business model and enables accelerated benefits.





Chapter 2

About this
study

This study endeavors to uncover workforce trends in the e-commerce industry, encourage strategic thought and shape future discourse on key people priorities, enabling organizations to consciously build the workplace of the future.

Are you still working remotely, or have you gone back to the office ?

81% Working remotely

8% Working in the office

10% Combination remote in-office

Where do you feel more productive ?

50% At home

30% The office

20% No difference

What are your thoughts on the real estate footprint for your organization ?

12% Remain the same as pre-COVID

6% Invest in more regional/suburban hubs

41% Remain in city-center with less space likely...

41% Invest heavily in remote work capabilities

Source: EY Work Reimagined Leaders Forum, 2021

The world of work has seen multiple resets in mindset and approach towards remote work models. In fact, it continues to evolve as the world in general and India in particular continues to battle the onslaught from newer waves of the pandemic. This study is focused on understanding the evolution of remote work and the emerging hybrid work models. It elucidates the key trends; highlighting the similarities and contrasting the distinctions in adoption of these models across e-commerce sub-sectors and participating organizations.

The insights in this study are derived from in-depth interviews with Chief Executive Officers (CEOs), Human Resources (HR) Heads / Chief Human Resource Officers (CHROs) and Public Relations (PR) Heads of participating organizations and EY's research and knowledge base of industry trends and practices. Participants in this study are fast-growing, impact-generating e-commerce players across industry sub segments such as EdTech, hyper local, insurance-tech, travel & hospitality, eB2B, FinTech and eB2C.

Through the comprehensive perspective on workforce strategies and practices shared through this study, we aim to further the people agenda across the sector and fuel the industry's growth trajectory.

“

We want to create a culture where people embrace agility coupled with an extremely strong ownership mindset, which helps us navigate an unpredictable, ever-changing external market.”

– Naveenkumar Nerlaje, HR Head, Licious



Chapter 3

Executive summary

A successful hybrid work model is the need of the hour as employers and employees have experienced and are experiencing never-seen-before disruptions in the recent past and the foreseeable future respectively. Most organizations are experimenting with initiatives and strategies to perfect this new workforce model. However, in many cases they are disjointed, point-in-time, reactionary efforts which may not lead to a holistic, proactive and forward-looking solution.

Implementation of a successful hybrid model that yields desired returns for your business requires careful deliberation on the following key fronts:

Q₁

When people can work from everywhere, what type of workplace do we need?

Design of a supportive workplace for Hybrid 2.0 is impacted by the extent of remoteness of different roles, pace of talent acceleration needed, degree of technology infusion present/planned and the purpose to be served by a physical office.

Q₂

When people can work from everywhere, what type of culture do we need?

Creation of an enabling culture for Hybrid 2.0 is determined by the embodiment of shared purpose, establishment of clear accountabilities, ensuring uniform levels of visibility and accessibility for all employees and maintaining emotional well-being.

Q₃

When people can work from everywhere, what type of people practices do we need?

Institutionalization of sustainable people practices for Hybrid 2.0 is driven by enhancing employee productivity, inculcating a sense of connect and belongingness and providing equitable treatment to accommodate for diverse workforce types and preferences.





Chapter 4

An enduring shift towards hybrid work models

The pandemic forced all organizations to adopt a remote working model. As the second wave in India continues to test business resilience, organizations are evaluating and reimagining what their model should look like, for today and for the future. The answer does not lie at either extremes, but on a continuum - a unique combination of in-office and remote working determined basis the organization's business model and talent needs.

“

As one of the fastest growing hyperlocal players in India, we were not only fully operational but also rapidly expanding our fleet of frontline delivery personnel to cater to emerging consumer needs during lockdown. We know and acknowledge that our business model will not support fully-remote working for a large section of our employees, however we are ensuring that we give them a highly safe work environment.

**- Tanushree Ray, HR Head,
Shadowfax**

”

Organizations today are in the process of evaluating and defining the nature as well as place of work for their workforce. The business model of the organization is the critical first input that shapes the organization's approach towards this decision.

Business models and nature of work performed by large sections of their workforce, force some organizations to adopt a more conservative hybrid model, more tilted towards in-office working. For others, benefits of hybrid work are evident.

For employees who adopt this, it allows the flexibility to continue working remotely, balancing their personal and professional responsibilities; while also having access to office premises for critical internal/ external meetings, team collaboration events, social mixers/ networking and more.

Organizations, through decreased in office occupancy rates, have an opportunity to realize substantial savings by optimizing their real estate footprint.



74%

employers are planning moderate to extensive changes in real estate³

Organizations are also exploring previously untapped talent pools and innovative employment models to build their ability to scale up or down rapidly in response to external changes.

While the benefits are straightforward, successfully implementing a hybrid work model is anything but simple. There is no one-size-fits-all approach for bringing employees (either a part of them permanently or all of them periodically) back to work. And it's something many companies are realizing as they attempt to adopt a successful hybrid-work model.



Chapter 5

Designing fit-for-purpose hybrid work models

There are three critical decisions organizations need to deliberate upon before adopting a hybrid work model. When people can work from everywhere:

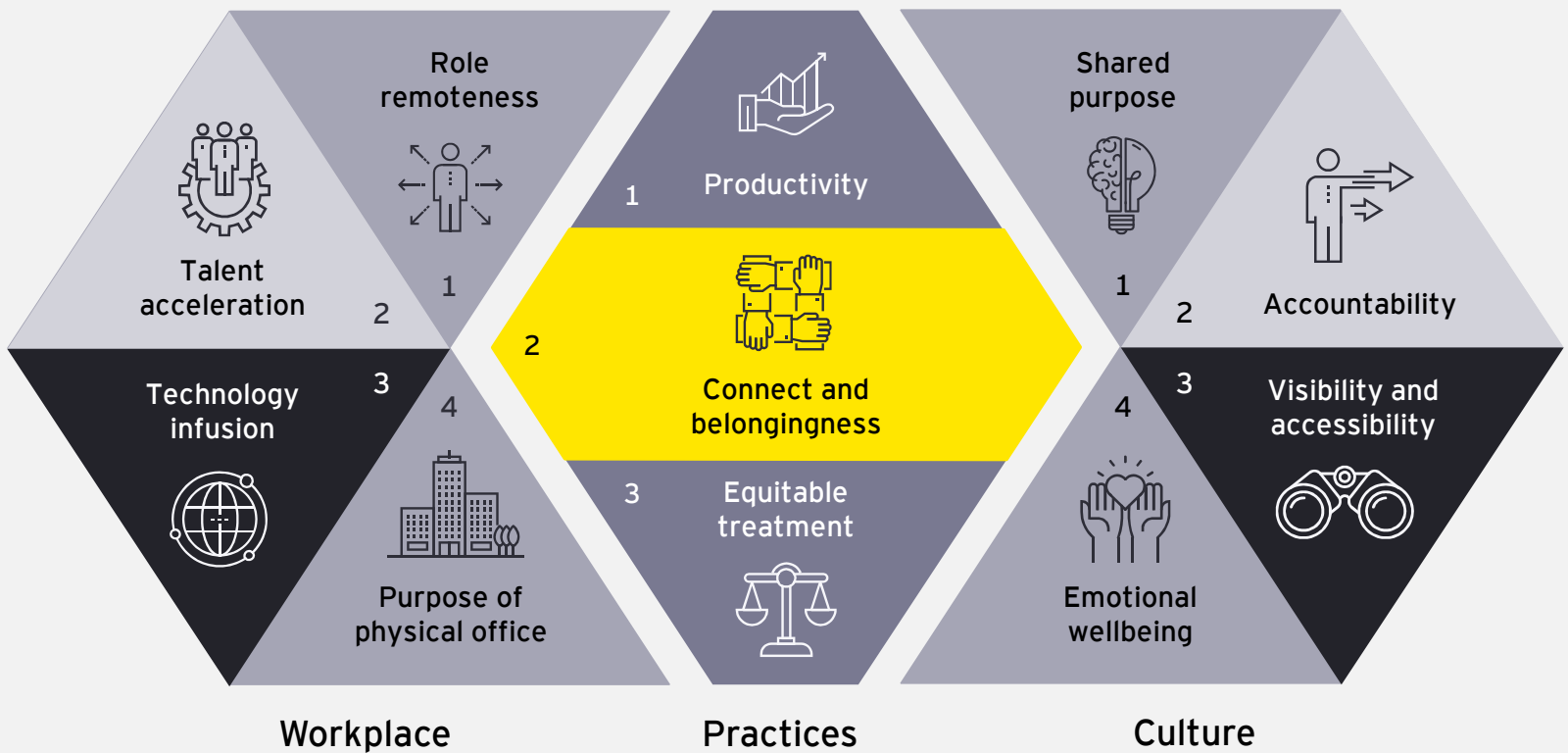
- 1

What type of workplace do we need?
- 2

What type of culture do we need?
- 3

What type of people practices do we need?

Deliberation levers for hybrid 2.0 work models



?
When people can work from everywhere, what type of workplace, people practices and culture do we need?
?

Framework for designing hybrid work model based on market insights and EY research

Workplace that will support Hybrid 2.0

1. Role remoteness:

Each role in an organization, based on the defined roles and responsibilities, interfaces/ interactions and nature of service delivery, has an inherent degree of “remote-ability” or remote working propensity. Scientifically determining this degree of role remoteness across sections of the organization, is a key input into designing the hybrid work model for the organization.

Leading eB2B player

“Many of our tech & engineering roles are working completely remotely, with no adverse impact on output.”

Leading eB2C player

“Our fulfilment centres were working just as normal, just with reduced capacity to ensure social distancing.”

In order to equip the steep growth journeys many leading e-commerce players in India are experiencing, there is significant focus on talent acquisition, at speed and scale. In many cases, companies are opting to tap previously inaccessible (or assumed so) talent pools. With the available proof of concept for remote work, organizations are hiring virtual workers in locations other than their base location, based on cost and availability of skills. They are also opening doors to different types of workers and employment models like gig workers and socially/ physically immobile members of the workforce.

2. Talent acceleration:

Leading Insurance-tech firm

“We are considering expanding to tier 2 cities by onboarding the capable, keen, trainable and relatively inexpensive talent from smaller cities.”

Leading hyperlocal player

“We are now open to exploring options to hire for niche technology roles, which are in perennial shortage here, from developed economies like Europe & the US, which was unthinkable previously.”

“

We are looking for ‘personal agility’ in the talent we hire. We need people who can navigate business uncertainties effectively and with ease.

- Devika Chauhan, Associate Director, HR - ShopX

”

3. Technology infusion:

Technology has and will continue to play a central role in driving hybrid work. A majority of e-commerce organizations have been built on a foundation of sound technology infrastructure to support their customer journeys, most of them were able to quickly pivot to nearly seamless remote operations and in many cases, it led them to reimagine the way a role contributes to the organization's success.

“

Technology acceleration brought on by the pandemic led to a fundamental shift in the way we sell, necessitating a digital upgrade to the mindset and skill set of our salesforce

- Preeti Kaul, People & Culture Head - Upgrad

”

“

Technology has helped us bridge 'the location gap' and enabled enhanced collaboration, as our teams continue to work in a hybrid manner

- Akhil Sikri, Chief Technology Officer & HR Head - Zolo Stays

”

4. Purpose for physical office:

Leading hyperlocal player



“We are utilizing our office as a hub to ensure assimilation, learning and collaboration, as it is important to frequently bring together (physically) our rapidly expanding employee base, so that we don't lose touch with our culture and purpose as a company.”

Great hybrid work models can segregate between the concept of work and office in ensuring seamless delivery of product/service offerings to its customers.

The physical office (whether the corporate office or branches, nodal centres and hubs) plays a critical role in the organization's success. It is important for the leadership team to identify the purpose of the physical office in enabling work and workforce, depending on their unique business context and challenges.

The office can assume a transactional role of a place to get work done, or be repurposed to act as a connector of diverse employee segments and ideas, a center for collaboration and complex problem solving, an anchor in times of uncertainty and a means to reinforce desired culture and ways of working.

Culture that will enable Hybrid 2.0

1. Shared purpose:

Fast growing FinTech company



"We doubled our leadership team during the pandemic. Even though we had hired seasoned industry experts, we mapped buddies from within the leadership team, who played a very active role in cultural assimilation of new hires over their first few months."

Emerging hyperlocal company



"We maintained negligible attrition amongst our delivery staff, when multiple industries were struggling with labour migration issues during the lockdown owing to constant reinforcement of our purpose, in words and in action, which led to continued morale and high productivity."

A shared purpose, that is clearly defined, communicated and understood by all greatly enables the organization's success, continued engagement with customers and ability to attract and retain the best talent.

In hybrid working, reinforcement of shared purpose needs focus, in absence of in-person opportunities like frequent interactions with leaders/ colleagues, posters/ visual messaging on office premises, etc. A workforce that is aligned to the purpose, is truly invested in the company's success and willing to walk the extra mile.

2. Accountability:

In hybrid work, accountability of individual and team outcomes and transparency in performance delivery, especially in areas of shared responsibility is crucial to instil mutual trust and maintain high performance.

It is critical to continuously document and update goals and progress and frequently connect on challenges faced and way forward. Agile performance philosophies like objectives & key results (OKRs) have been increasingly adopted by e-commerce organizations to bring in agility and continuous monitoring of performance. It is a proven methodology to help drive purpose-led achievement of aspirational goals, greater collaboration, enhanced transparency and sharp focus on desired outcomes; while allowing firms the agility not often offered by traditional goal-setting mechanisms.



70%

of participating organizations have highlighted accountability and performance outcomes as a critical focus area⁴



50%

of participating organizations have adopted agile performance management philosophies⁵

3. Visibility and accessibility

Some leaders and employees may not be able to adopt to hybrid ways of working as naturally as others, due to innate preferences. While most leaders adapt themselves due to their role requirements; many team members may struggle to get the required attention as remote workers.

This was a risk highlighted by many organizations. Certain employee segments have retreated into a cocoon with extensive virtual working; which can be detrimental to overall engagement and motivation levels, with a potential to lead to low productivity and/ or attrition.



57%

of the world prefers introversion, according to the 2019 Myers-briggs Type Indicator (MBTI) global sample⁶

It is incumbent on the leadership team to clearly establish team norms and ensure that their time and attention is not disproportionately directed towards well-networked, extroverted and forthcoming employees. They need to be able to create an environment of trust, openness and connect with every team member.

4. Emotional Wellbeing

Emotional well-being is a critical part of an individual's overall health and attitude towards life and work. It has rightfully gained increased employer focus during the pandemic due to growing issues of burnout, stress and mental health concerns amongst workers.

While most organizations and individuals been impacted, to varying degrees, we still have a long distance to cover in enabling open and honest conversations at the workplace around mental health and emotional well-being.



44% and 38%
Millennials and Gen Z employees

who took time off work due of stress or anxiety said they hadn't disclosed the real reason to their managers due to the stigma attached⁷

“

We have an abundance of bright, young talent. We provide 'no-judgement sabbaticals' to ensure their continued learning and growth in their chosen areas, or even rejuvenation and recovery from burnout.

- Jasneet Kaur, Chief Human Resource Officer & Akanksha Jain, Head of PR and Communications - BharatPe

”

Leading hyperlocal player



“Ensuring psychological safety amongst teams is a key priority area for us this year. Our team is implementing a series of interventions to address it.”

It is as essential to ensure emotional wellbeing of employees as it is to provide them tools/ technology to work. It needs to begin with leadership team members being empathetic to employees' needs (truly listening), providing forums to voice and address challenges, reasonable allocation of workload, establishment of formal and informal support groups and avenues to disconnect from work among others. Conscious and unconscious biases towards people suffering from mental health issues, need to be addressed by organizations at a systemic level.

People practices that will sustain Hybrid 2.0

1. Productivity:

Maintaining and enhancing productivity from both in-office and remote employees, especially when teams consist of a mix of both types is a crucial part of unravelling the puzzle of sustained hybrid work models. Traditional outlook towards productivity may no longer suffice.



49%

employers are looking to change how they measure productivity at work⁸

It is also important to note that not all employees are adequately equipped with high-speed internet access, designated home workspaces or distraction free environments. A hybrid environment may also put employees who chose to work remotely at a disadvantage, if there is a loss in context due to “socially gathered information” or if employees “seen” in the office are perceived to be more productive.

“

Performance was a key driver in shaping our hybrid work model. Agents who have lower productivity have been asked to return to work and we are already seeing improvement in outcomes. Our high performing agents have been given an option to continue to work from anywhere as an earned privilege.

- Sarbvir Singh, CEO - Policybazaar

”

Different aids/ support mechanisms have to be put in place to enable high performance from different sets of employees. Leaders could operate from different biases based on their own work preferences/ arrangements.

While designing hybrid work models and team norms, it is important to think of comparable offerings to optimize outputs from both sets of employees. Leaders need to start modelling these new norms and behaviours first, and let go of erstwhile way of working, for it to percolate to teams below.

2. Connect and belongingness:

Connect and belongingness are powerful sentiments experienced internally and demonstrated externally in tangible behaviours, daily, by all employees. This needs to be continuously reinforced in employees through cultural, procedural and managerial interventions.



Many organizations have started asking employees to come to office two days in a week, to spend that time disproportionately in activities such as team bonding sessions, career conversations with mentors and leadership townhalls.

“

Hiring for culture and training for skills is an important part of our brand ethos. Referrals only hiring has become a critical lever in our organisation model.

- Akriti Chopra, Head of People Development - Zomato

”

Connectedness to the organization can create an emotional bond, which makes the employee believe in the organization's purpose and direction, understand and have faith in the decisions taken by the leadership (even the difficult ones), spearhead change initiatives, contribute to his/her role meaningfully and act as cultural ambassadors, among others things.

3. Equitable treatment:

Being treated with fairness and equality is key to maintaining employee morale and motivation on the job. Simply put, all employees compare their inputs (time and effort) to the outcomes (monetary and non-monetary) received from the job.



78%

employers are planning moderate to extensive changes to remote work strategies and associated policy changes⁹

If there is misalignment felt by the employee in the two aspects, either inherently at an individual level or when compared with peers/people manning similar roles, it can lead to discontentment and eventual disengagement. This fairness and equality can span various facets of the employee's experience at work in terms of employee policies and benefits, career growth and learning opportunities, pay, recognition and rewards, flexibility, well-being and support/ enablement at work.

The pandemic has unearthed the need to be far more sensitive to personal responsibilities of many employees (for example working parents with young kids at home with day-care centres and schools being closed and employees with care-provider duties at home). Meaningful employee experiences can create a level playing field for all employee segments and ensure that they are sufficiently supported, treated equitably and fairly and feel empowered to deliver to their maximum potential.

“

None of us were prepared for the pandemic that struck us like a tsunami. In the hybrid work model we adopted, it was important to ensure that we change and adapt our approach and policies as the situation unfolded, to ensure we maintain employee engagement and productivity.

- **Manjula Rao, Vice President and HR Head - FirstCry**

”

“

Employee-friendly policies and practices are deeply embedded in our value proposition. As we transitioned to new ways of working, we reinforced this with several market-leading practices to enable and support our employees in these unprecedented times.

- **Sumanta Dey, Senior Director, Corporate Affairs - Unacademy**

”

Adopting a hybrid workforce model is the natural choice going forward; however, it is definitely not an easy transition to ensure seamless coexistence of different types of employees. Organizations will need to go digital and transform for growth on the new S curve. Future-focused planning must place humans at the center, technology at speed and innovation at scale as the central values of transformation. Companies already operating with these value drivers are proving more resilient and will adapt even faster, in the new equilibrium and beyond.

This creates a pivotal opportunity for leaders to reimagine the organizational landscape, along the key levers of **workplace**, **culture** and **people practices**. While the eventual design of each hybrid model will be different, based on the business's unique context, it is critical to fully understand, thoroughly deliberate and carefully conceive each of the contributing factors that lead to a **supportive workplace**, **enabling culture** and **sustainable people practices**.

The uncertain pace and inconsistent needs of the external and internal environment demands direct action and close involvement of the top leadership and subsequently, their next-in-lines. The leadership needs to **listen** (gather data on workforce, business and environment), **align** (agree on the future blueprint) and **act** (lead and measure enterprise-wide change). This exercise needs to be carried out in iterative cycles to continuously sharpen their hybrid workforce models, in order to ensure that it yields the desired results on business and people related fronts.



Chapter 7

About the team

People Advisory Services (PAS) Overview

PAS is amongst the largest HR advisory practices in India with a dedicated team of 150+ experienced HR consultants. It specializes in advising clients on solutions across the HR value chain, such as Organization Design, Performance, Rewards, Talent Acquisition, Learning & Development, HR Systems & Processes, Mobility and HR Analytics. As one of the 5 EY global Centres of Excellence, it brings in the best of EY's global network and expertise and frequently engages with leading Indian and global players across multiple industries and diverse organizational sizes and stages of maturity.

E-commerce Advisory Overview

The E-commerce Advisory focuses on driving growth, strategy formulation and strengthening the positioning of EY as a brand in the e-commerce and consumer internet sectors in India. The Advisory helps to foster enhanced capability, innovation and alliances within the sector and implements programs across transaction advisory, strategy, performance improvement and tax. It also spearheads initiatives to develop and communicate market insights in the form of thought leadership articles, point-of-view documents, external publications among others.

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3: Based on insights from the EY Physical Return to Work Reimagined (PRWR) survey and JAM analysis (from an interactive crowdsourcing event) using the MillionYou platform in June and July 2020

4 & 5: EY Analysis based on conversations with participating organizations

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9: Based on insights from the EY Physical Return to Work Reimagined (PRWR) survey and JAM analysis (from an interactive crowdsourcing event) using the MillionYou platform in June and July 2020

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