Delivering agile innovation
Creating value from collaboration with entrepreneurs in consumer products and retail in Belgium and the Netherlands
“The traditional internal innovation road map is no longer fit for purpose. Navigating the age of innovation requires companies to develop an innovation flight map.”

David Jensen, Global Innovation and Digital Strategy Leader, EY

Of consumer products and retail company executives in Belgium and the Netherlands, only 27% have collaborated with entrepreneurs/startups on product/process innovation more than five times in the past three years.

Of consumer products and retail company executives in Belgium and the Netherlands, only 89% are collaborating with value chain partners (e.g., suppliers, distribution partners, customers) for product innovations.

Age of Manufacturing 1900 - 1950
- Mass manufacturing enables industrial powerhouses to rise

Age of Distribution 1950 - 1980
- Global connections and transportation systems make distribution key

Age of Information 1980 - 2000
- Connected supply chains and the introduction of PCs means those that control information flow dominate

Age of Experience 2000 - 2015
- Companies compete on the quality of experiences, processes and business models win

Age of Innovation 2015 - ?
- Companies that place innovation at the heart of their experiences, processes and business models win

EY collated survey responses from 44 consumer products and retail companies in Belgium and the Netherlands, to examine how organisations in these countries approach process and product innovation. Respondents were responsible for a range of activities within their organization, including marketing, finance, and R&D/product development, and were primarily C-suite or board-level, or director level. This quantitative research was supplemented by a small number of qualitative interviews.

This research is in addition to EY’s global survey Delivering agile innovation amongst 267 executives in retail and consumer products companies from 30 different countries.
Winning in the ‘Age of Innovation’

“The traditional internal innovation roadmap is no longer fit for purpose. Navigating the age of innovation requires companies to develop an innovation flightmap.”

David Jensen, Global Innovation and Digital Strategy Leader, EY

We now live in an age of innovation. To grow and maintain market leadership over the long term, companies need a constant flow of new product and process ideas. If the flow of these innovations slows, any company will quickly find itself outpaced or disrupted by more nimble, often smaller, competitors.

Consumer products and retail companies across the world face unrelenting pressure to innovate, and companies based in Belgium and the Netherlands are no exception to this. Consumer spending in Belgium is expected to increase by just 1.75% between now and June 2015, and to marginally decrease by 0.2% in the Netherlands over the same time period. In comparison, consumer spending in Brazil is expected to rise by 12.3% by June 2015.¹ Consumers’ balance sheets have also become increasingly bloated, with debt as a percentage of household income rising from 60% to 89% between 2006 and 2012 in Belgium, and from 164% to 250% over the same time period in the Netherlands.²

At the same time, the industry must contend with a challenging environment characterized by continuous, accelerating change and spiraling complexity. To increase or even maintain their market position, companies need an innovation process that delivers a constant flow of new product and process ideas.³

To succeed against such a challenging backdrop, companies need a highly agile model for innovation that accelerates speed to market and helps them to re-imagine business models and transform consumer experiences. Yet this agile approach to innovation is extremely challenging to get right. Often, a narrow focus on efficiency and the minimization of variances has led to a pervasive culture of risk aversion. This is incompatible with the pressure to innovate because disruptive new ideas rely on a willingness to take risks and embrace failure.

In this report, we argue that consumer products and retail companies in Belgium and the Netherlands require a more agile approach to innovation. Increasingly, innovation must not only take place within the four walls of the organization. Companies will need to collaborate with external partners, and particularly smaller entrepreneurs, to identify, develop and scale up promising new product and process ideas. Innovation must become more open, more fluid and more dynamic, with a greater emphasis on experimentation, adaptation and speed.

¹ http://economics.com/
³ “Delivering agile innovation”, EY, Jun 2014
Winning in the ‘Age of Innovation’

“It’s increasingly difficult for large companies to deliver innovative products, services and processes. The world gets evermore competitive and so being open to new sources of innovation is just a smart business move, because otherwise you’re closing your eyes to real opportunity.”

Dominic Oughton, IfM Education and Consultancy Services, University of Cambridge

Product innovation is a particular challenge for companies in Belgium and the Netherlands.

Consumer products and retail companies across the two countries are struggling with innovation. More than half (54%) of firms in Belgium and the Netherlands say they have found product innovation more challenging over the past three years, compared with 39% globally. Process innovation is perceived as less problematic but, even here, 36% say that is has become more challenging, compared with 39% among the global sample.

Of consumer products and retail company executives in Belgium and the Netherlands

74% have sourced between 5 and 25% of their process and product innovations from external firms

70% mention crowdsourcing and external innovation competitions as the most important activities they currently engage in regarding product/process innovations

Chart 1a: In the past three years, what change have you experienced in level of difficulty at conducting PRODUCT innovation?

Chart 1b: In the past three years, what change have you experienced in level of difficulty at conducting PROCESS innovation?
Winning in the ‘Age of Innovation’

A desire to access the innovative qualities of smaller firms are a key driver of change. A range of external and internal drivers is encouraging a different approach to innovation. Asked about the factors that are most encouraging them to collaborate with smaller entrepreneurial firms, companies in Belgium and the Netherlands point first and foremost to the quality of innovation among those companies, as well as their agility.

Survey respondents also point to increasing complexity as one of the top three factors encouraging collaboration. As we explored in our 2012 report Disrupt or be Disrupted: Creating Value in the Consumer Products Brand New Order, this greater complexity is being driven by changing stakeholder needs, and the requirement for a new approach to brand management, supply flexibility and leadership styles.

Faced with innovation challenges, companies in Belgium and the Netherlands recognize that they need a different approach. There are strong signs from our survey that consumer products and retail companies in these two countries understand the need for change. Almost seven out of 10 (68%) respondents agree that they can no longer expect to rely on traditional internal R&D as a sole source of innovation. Startups and entrepreneurial firms will form an important part of the solution, with six out of 10 (64%) respondents agreeing that collaborations with these smaller, more agile companies is more likely to lead to disruptive innovation than an entirely in-house approach.

“...It’s all about agility, speed to market, and faster decision-making processes. As a startup or smaller entity you must innovate or you will never obtain a serious market share, whereas larger corporates already have a specific market share. They focus on competing against other firms of the same size, and lose sight of the smaller companies that grow more quickly than they do.”

Marc Cosaert, Consumer Products & Retail Leader for Belgium and the Netherlands, EY

41% find high quality of innovation among smaller entrepreneurial firms encouraging to collaborate

50% of the three key objectives for collaborating with smaller firms are product/product portfolio development, increasing speed to market and a broadening reach to market.
Companies in Belgium and the Netherlands are increasingly considering external collaboration as a way of addressing innovation challenges. Collaboration with external firms on innovation is at a relatively early stage for consumer products and retail companies in Belgium and the Netherlands, but there are signs that the trend is increasing. Among our respondents, 48% say that they will increase the proportion of product innovation, and 50% the proportion of process innovation sourced from external firms, over the next three years. Universities will be one of the primary sources of collaborative partners, with both countries boasting a strong culture of collaboration between corporates and academia.

Despite the potential benefits of external collaboration, companies are struggling to make these partnerships work in practice. As consumer product and retail companies in Belgium and the Netherlands turn increasingly to external collaboration for their innovation needs, they will need to work hard to ensure success.

Currently, however, most companies are struggling to derive the expected benefits from these collaborations. Just 7% say that they have been very effective at generating positive consumer feedback from collaboration, 7% very effective at generating intellectual property and only 5% at building a broader culture of innovation.
Winning in the ‘Age of Innovation’

Large companies in these two countries also struggle with the management of these relationships. Just 16% say that they are very effective at measuring ROI and building trust, and 11% at putting in place an appropriate governance model. Sourcing potential partners is a particular challenge, with just 2% reporting themselves as very effective here.

So why are companies struggling to realize the benefits? Our survey respondents point to a number of key weaknesses that are hampering success. Foremost among them are the difficulties around the ongoing management of the relationship with the entrepreneurial firm, and the way that the working arrangement is structured. All of this means that collaborations can get bogged down in bureaucracy, relationships fail to move beyond the transactional, and the smaller firm can become frustrated by what it perceives as the slow speed and risk aversion of the larger partner.

This highlights the importance of paying very careful attention to structuring the arrangement and ensuring that the objectives on both sides are clearly understood. A balance also needs to be struck between putting in place a strong governance framework without imposing constraints that will hamper the innovation process.

“The big challenge is to be creative without thinking immediately of barriers to execute. Larger corporates are likelier to have these cultural barriers - be it time, money, or decision-making. These barriers are greater for large corporates than for entrepreneurs.”

**Marc Cosaert, Consumer Products & Retail Leader for Belgium and the Netherlands, EY**

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### Chart 6: How effective is your company currently at working with smaller entrepreneurial firms on innovation in the following areas? (Chart shows percentage who have been very effective)

<table>
<thead>
<tr>
<th>Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measuring ROI</td>
<td>6,8%</td>
</tr>
<tr>
<td>Building trust</td>
<td>9,1%</td>
</tr>
<tr>
<td>Pathfinding an appropriate governance model</td>
<td>11,4%</td>
</tr>
<tr>
<td>Learning for entrepreneurial firms</td>
<td>15,9%</td>
</tr>
<tr>
<td>Integration of outputs</td>
<td>15,9%</td>
</tr>
<tr>
<td>Putting in place an appropriate arrangement</td>
<td>9,1%</td>
</tr>
<tr>
<td>Aligning incentives</td>
<td>9,1%</td>
</tr>
<tr>
<td>Sourcing potential collaboration partners</td>
<td>6,8%</td>
</tr>
<tr>
<td>On-going management of the relationship with the entrepreneurial firm</td>
<td>2,3%</td>
</tr>
</tbody>
</table>

### Chart 7: What are the key challenges of collaborating on innovation with smaller entrepreneurial firms?

- Measuring ROI: 34%
- Building trust: 31%
- Pathfinding an appropriate governance model: 29%
- Learning for entrepreneurial firms: 29%
- Integration of outputs: 28%
- Aligning incentives: 28%
- Sourcing potential collaboration partners: 28%
- On-going management of the relationship with the entrepreneurial firm: 27%
- Effectively positioning/integrating the entrepreneurial firm’s innovations within our firm’s own operations: 25%
- Clash of cultures and/or ways of working: 20%
- Legal issues: 10%
- Reluctance to take risks: 9%
- Reluctance to share information, knowledge and IP: 8%
- Reluctance to accept failure: 7%
- Lack of appetite internally within company leadership: 6%
- Effectively positioning/integrating the entrepreneurial firm’s innovations within our firm’s own operations: 6%
- Lack of available internally within company leadership: 6%
- Effectively positioning/integrating the entrepreneurial firm’s innovations within our firm’s own operations: 5%
- Lack of available externally within company leadership: 5%
- Effectively positioning/integrating the entrepreneurial firm’s innovations within our firm’s own operations: 4%
- Effectively positioning/integrating the entrepreneurial firm’s innovations within our firm’s own operations: 3%
- Effectively positioning/integrating the entrepreneurial firm’s innovations within our firm’s own operations: 2%
- Effectively positioning/integrating the entrepreneurial firm’s innovations within our firm’s own operations: 1%
- Effectively positioning/integrating the entrepreneurial firm’s innovations within our firm’s own operations: 0%

Of consumer products and retail company executives in Belgium and the Netherlands

- 66% recognize the potential value of collaborations but in practice have found it difficult to make it work
- 34% think that their current network/ecosystem of collaboration partners is insufficient to meet their innovation needs
The nine principles of agile innovation

Overcoming the challenges of collaborating will be critical to delivering agile innovation. Based on our experience, successful collaboration with entrepreneurs and startups requires companies to adopt nine principles:

Create

1. Make the case for being agile
   Lead courageously

Consumer products and retail companies recognize the need to change the way they innovate. But making this change, and adopting a more open approach, is a major undertaking. To achieve effective collaboration with entrepreneurs, we believe leadership must be the catalysts for change and ensure that the organization as a whole is willing to rally around new models of innovation. Companies need a clear rationale for which ideas get developed internally, and which should be candidates for external collaboration. A holistic innovation strategy, which defines objectives for both internal and external innovation, is essential.

   “It’s critical that leadership gives you the flexibility and breadth of opportunity to try new and different things. Just as important are the logistical and structural support systems that allow you to do that and those come from the true top-level support.”

   Kathryn Sheaffer, Senior Associate Brand Manager, Mondelēz International

2. Cultivate an agile culture of experimentation
   Encourage ideas and embrace failure

The startup mentality of “fail fast, fail cheap and fail often” is adverse to the traditional Consumer products and retail innovation model. Large companies frequently have a fear of failure and a reluctance to experiment. Initiatives, such as Six Sigma, which are designed to minimize variances, can amplify this. Business leaders must therefore nurture a culture in which ideas and experimentation are encouraged and embrace failure as an opportunity to learn, while ensuring the benefits of the Six Sigma model are not lost. The two cultures must co-exist.

   “Big brands typically want everything to be perfect when it goes out to market. When working with startups you have to realize that not everything you do is going to be perfect or succeed. And you have to also be willing to evolve and tweak the program as it’s live.”

   Ed Kaczmarek, Co-Founder and Managing Director, Brand Accelerator

3. Think simple, act fast
   Set clear and transparent objectives

Entrepreneurial firms are typically unencumbered by bureaucracy. Many embrace near-lean methodologies, which means they have a very efficient approach to identifying, discarding or pursuing new innovations. Large consumer products and retail companies should embrace this attitude as much as possible, empowering managers to make rapid decisions. Common agreement and clarity around the problem statement is also critical. In the world of agile innovation there are many levers that managers can pull. A clear and transparent objective enables the optimal innovation strategy to be executed.

   “I spend a lot of time with entrepreneurs and I am always impressed by the speed with which they make decisions and capitalise on new opportunities. Diageo is a large, global company, but it is important for us to keep an entrepreneurial spirit and a flexible approach to innovation in all of our markets. Seeing the way entrepreneurs work can give us ideas that may enable us to work quicker and leaner.”

   James Ashall, Innovation Director, Futures Team, Diageo
“Businesses need to be open minded when entering this space, and be sensitive to the needs of the person or organization they are partnering with – while being clear about their own needs. Be ready to adapt and manage change. Big corporate research and development (R&D) teams sometimes see external partners as a threat rather than as an opportunity to learn new skills. But it is diversity of thinking, which allows you to innovate and overcome challenges.”

David O’Reilly, Group Scientific Director, British American Tobacco

4. Identify the right team
Bring together the right internal team members with the right external partners

As consumer products and retail companies become more experienced at collaborating, their approach to identifying potential partners becomes more strategic and less ad hoc. Successful companies use both inbound and proactive approaches, and ensure that collaborations are closely aligned with their broader strategic goals. However, serendipity is still an important ingredient in many collaborations. We believe companies must “make their own luck” by ensuring that they are exposed to as many new ideas as possible and have the right processes to filter these approaches and spot the most promising. But successful collaborations do not just depend on finding the right entrepreneurs. Large companies also need to identify the right internal team to manage those relationships. Consumer products and retail companies need to look for individuals who have the right mindset and can serve as effective, “multilingual” translators between the entrepreneurial and corporate worlds.

“The collaboration should be about shared passion. The value you create should be valid for both partners, and not just for the larger firm. It needs to be on equal terms.”

Theo van den Aardweg, Vlisco

5. Determine the appropriate framework for each collaboration
Understand the asymmetries and apply LEAN governance

There is no one-size-fits-all model for collaborating with entrepreneurs. We believe consumer products and retail companies need a framework that provides the flexibility to allow different engagements, but within defined parameters. Some companies will prefer to use an intermediary as the broker between their own business and the entrepreneur, while others will choose an incubator model to nurture promising innovations. Keeping collaborations at arm’s length from the core business will typically make sense, in order to give them space to breathe and the ability to operate under slightly different rules. Whichever approach is chosen, companies must take into account the asymmetries of the relationship – for the large company, this is just another small project, but for the entrepreneur, this may make the difference between the success and failure of their entire venture.

“The collaboration with external partners is all about trust. You have to identify the risks, and look at how big the opportunity is. You also need to establish protocols for communication and the sharing of data to ensure that it is secure and that your information is not being compromised.”

Ron Van Gool, CIO, Cosun

6. Maintain open, frequent communication
Align expectations and set rules of engagement

Consumer products and retail companies have very different cultures, processes and speeds of working compared with startups. Aligning expectations requires a certain amount of give and take, and the ability to understand clearly the opposite party’s concerns. It is essential to set clear parameters for the engagement at the outset. EY believes both parties should be clear about their roles, responsibilities and expectations. Robust governance needs to be in place, without stifling the collaboration or burying it in bureaucracy. Open, frequent communication between the two parties is essential. This should go beyond regular conference calls and occasional meetings. Successful collaboration requires both parties to embed themselves in each other’s business environment so that there is a deep mutual understanding and alignment.

“Aligning with expectations is key to success. As a big company, we have proven gates and decision-making framework that may look cumbersome and slow to a smaller, leaner company. So we at P&G need to be cognoscente of the expectations of our partners and be in constant communication so they don’t feel neglected. At the same time, we have learned helping our partners understand our decision process and why in the long run it actually reduces time by minimizing rework and improving success rate has been very beneficial. Like any relationship, open communication is key.”

Laura Becker, VP Global Business Development, Procter & Gamble
Activate

7. Adapt processes and break rules as necessary

Avoid rigidity in project planning

Business processes need to be changed in order to collaborate effectively with entrepreneurs. For example, the large company’s procurement processes may take several months to navigate, but that may be too long for the small startup with just a few months of funding to develop a new idea. Business leaders must accept variance from the corporate norm and ensure that these normal processes and rules can be circumvented, without undermining their validity for the core business.

“We adapt what we do depending on the market in which we are operating. For instance, in China we recognize that the issue of IP protection should be handled differently than in other markets where we operate.”

Daniel Scholten, Manager, 3M New Ventures

8. Define and measure success

Set parameters to conduct innovation health checks, but don’t obsess about perfection

In a transactional relationship, the purchasing company tracks the performance of the supplier and ensures that it meets clearly articulated targets. But when collaborating with entrepreneurs on innovation, tightly defined performance metrics will not work. Equally, it is important not to obsess over perfection. Developing ideas quickly that are “good enough,” then testing and refining them in an iterative process, is often a more effective way of innovating than laboring over perfection.

“When tracking and measuring success, I recommend separating the qualitative and quantitative elements. Corporates like to see how many new sales are coming from new products and services, but measuring that is more long term. Other elements are primarily in qualitative areas, such as the impact on corporate culture, willingness to experiment and the acceptance of failure, as well as faster communication and decision-making.”

Marc Cosaert, Consumer Products & Retail Leader for Belgium and the Netherlands, EY

9. Iterate and work incrementally

Embed mechanisms to quickly learn from the experience and failure and be prepared to course correct and pivot

Entrepreneurs have much to teach large organizations about innovation. Their emphasis on rapid prototyping, and their willingness to take risks and learn quickly from mistakes are the bedrock of their capacity to innovate. Although multinational consumer products and retail companies may never have the agility of the startup, we believe it is essential that they embed mechanisms to learn from smaller collaborators, and refine their own approach to innovation by adopting some startup behaviors and approaches.

“Working with external partners has brought the philosophy of innovation into the company. We have learned to be more open minded and more willing to say, it’s OK to get this wrong as long as we learn from it. When you meet entrepreneurs and inventors, the question that we ask is how could we do this as well, or better?”

David O’Reilly, Group Scientific Director, British American Tobacco
Delivering agile innovation. Creating value from collaboration with entrepreneurs in consumer products and retail in Belgium and the Netherlands.
EY’s agile innovation flight map

**Accelerators**

1. **Reality**
   - Establish ground truth
   - Establish performance drivers

2. **Possibility**
   - Explore strategic growth paths
   - Technologists

3. **Simplicity**
   - Design and architect the experience
   - Designers

4. **Agility**
   - Ideate and iterate
   - Strategists

5. **Scalability**
   - Develop market, ecosystem and operations
   - Experiences

**Services**

- Certified process guides
- Operating model
- Business model innovation

**Monitor**

- Fail forward
- Fall forward
- Launch
- Services
- Products
- 4D market maps
- Early wins

**90-day sprints**

- **Create**
  - Identify new needs
  - Envision a better way
  - Validate ideas

- **Incubate**
  - Define operating model
  - De-risk investment
  - Develop strategy

- **Activate**
  - Commercialize opportunities
  - Drive growth

**EY’s agile innovation flight map**

*Delivering agile innovation* Creating value from collaboration with entrepreneurs in consumer products and retail in Belgium and the Netherlands
Crowd sourcing subject matter resources

When EY engages the practitioners on the ground they bring the expertise of the SMRs in the cloud by utilizing firm communication and collaboration tools. In this way any one resource can bring the minds of the firm to their work.

4D market maps

Overlays of patterns, positioning, scenarios, and customer experience to define disruption opportunities.

Life of the customer

Rather than trying to analyse and create new individual customer transactions, EY looks at what customers are looking for outside of the immediate transaction and value proposition to explore the full customer experience, including the footprints they leave on the organization, and the emotional impact of the experience.

Incubator Spin Cycle

Innovation demands doing something new, which requires piloting fresh ideas, revising them and piloting again.

EY’s Incubator Spin Cycle allows the creation and adaptation to happen simultaneously with experience modeling and incubating, then capture failures and successes necessary for each pilot to test something new and continuously improve.

Air readiness

Transformational readiness assessment takes the pulse of an organization’s ability to transform, including operating model, emotions, social styles, functional buckets, skill sets, bandwidths, technologies, etc.

The measure of readiness in each area is based on feasibility, speed to execute, costs, etc., a unique blend of risk and performance-based metrics.

An air readiness assessment is richer than a traditional transformation readiness assessment by including internal and external lessons learned and research, and creating teams to reflect on feasibility based on operating model, emotions, social styles, functional buckets, skill sets, bandwidths, technologies, etc.

Data and social interpretation

By utilizing the data from customer transactions, feedback and social media experiences, EY creates a similar view to traditional business intelligence, but of the organization’s emotional impact and the reality of the customer journey and experience.

Go-to-market and channel strategy

Rather than piloting internally or within test environments, incubation needs to occur with real customers in the actual market environment so they experience channel strategies. Adaptation and creation must be able to occur simultaneously with the customer experiencing the envisioned change. EY has developed the structured method for “real” pilots and how to capture the impact of what has been envisioned and incubate further.

Power PMO

Rather than requiring PMO teams to hold typical go/no-go conversations with leadership teams and steering committees, program sponsors are granted the power and authority to decide when and what is launched in the market. Leadership grants the authority based on the vision and charter for the program and trusts the team to make the decision.
Examples of agile innovation in consumer products and retail companies

“We need to make sure we’ve got employees at the interface with entrepreneurs who are proactive, flexible and able to embrace, new and different things. That will give you the best chance of success.”

Jon Wilson, VP Innovation Kimberley-Clark

Launched in 2001, Procter & Gamble (P&G) ‘Connect + DevelopSM’ initiative has led to more than 2,000 partnerships. It has transformed the culture into one where an open approach to innovation is expected throughout the company from R&D to supply chain.

Heineken structurally connects and collaborates with innovators from outside such as through their Innovators Brewhouse platform for Open Innovation. Innovators around the world can connect with Heineken. Its aim is to collectively shape the future of beer and cider through invention and shared development.

FrieslandCampina has introduced capsules of Chocomel Hot for the preparation of hot chocolate drinks. FrieslandCampina collaborated with numerous parties to develop this product. For instance, University of Eindhoven engineers were involved in the modeling of the mixing behavior of the liquid in the cup.

Diageo set up incubator Distill Ventures to identify and develop craft distilling and boutique brands. Qualifying companies receive funding, access to expertise and cash flow. Diageo has an option to purchase those that are the most successful which will then be brought into the main business to form part of the core portfolio.

At the Food Tech Park Brainport in Helmond, food, technology and chemistry are brought together to create innovative Agri-Food solutions. Innovative technologies for the industrial processing of food are valorized, in order to waste less and conserve food better.
Executive respondents to EY’s survey of consumer products and retail companies in Belgium and the Netherlands.

Respondents were C-level or board-level executives.

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