



Reimagining life sciences Global Capability Centers

The next frontier of innovation,
efficiency, and compliance at scale

August 2025

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The background is a dark, deep blue space filled with numerous small, out-of-focus light points (bokeh) in shades of blue, white, and orange. A prominent, bright orange and yellow particle trail, resembling a comet or a nebula, curves diagonally from the upper right towards the center. The text 'Fore word' is positioned in the lower half of the image.

Fore
word



The life sciences industry stands at a pivotal juncture—where innovation, resilience, and global collaboration are not just aspirations but imperatives. As organizations navigate the complexities of regulatory landscapes, pricing pressures, and the looming patent cliff, Global Capability Centers (GCCs) have emerged as strategic engines of transformation. No longer confined to transactional support, GCCs are now driving enterprise-wide outcomes—from accelerating drug discovery to enabling precision medicine and patient-centric innovation.

India's prominence in this evolution is evident. With over 60% of global GCCs anchored in the country, the country has become the backbone for driving innovation and value, besides global operations—offering unmatched talent, policy support, and infrastructure. The shift from cost arbitrage to capability arbitrage is real and irreversible. GCCs are now co-owning innovation, embedding themselves in core R&D, and shaping the future of health and medicine.

The unprecedented growth of GCCs is contributing meaningfully to India's GDP, nurturing world-class talent, and strengthening supplier ecosystems. Importantly, GCCs are also helping position India as a strategic destination for investment from life sciences organizations, creating a compelling case for deeper collaboration between industry and government.

Through this thought leadership paper from EY, we capture the pulse of this transformation. It reflects the voices of industry leaders, the imperatives shaping next-gen GCCs, and the ecosystem that is enabling this shift.

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The life sciences industry has shown incredible growth and agility in shaping the GCC potential. The GCCs in the industry today are driving innovation, accelerating drug development and patient centric solutions at a global scale. These are truly the capability centers that have challenged the norms and imperatives of the past and defined new growth paths for future.



Sonam Mahajan

Partner,
Business Consulting - Life Sciences,
EY India

01

Evolving role of GCCs

The life sciences sector is set for major growth, while currently hovering at around US\$1.9T globally, growing at 7% CAGR for the last 5 years, despite the 'Loss of Exclusivity' (LoE)¹. Previously, life sciences companies have shown resilience by adapting to the ever changing economic and business landscape by re-establishing their operating models to be more agile, their supply chains more robust, and their products more compliant. The COVID-19 pandemic has changed how the world looks at GCCs, more and more leaders in the sector are appreciating the value that they bring to the table to **advance patient centricity, accelerate drug discovery and research**, while integrating with **end-to-end global strategic initiatives**.

The industry has **faced tailwinds aiding the evolution of Global Capability Centres** to support parent organisations in not just transactional activities but value-driven business outcomes. Companies of all sizes in the **life sciences sector are embracing the trend of establishing GCCs to realise strategic objectives and achieve operational excellence**. This shift underscores the industry's commitment to innovation and adaptability in a highly competitive and regulated environment.

Pricing pressures: The pharmaceutical industry, once considered insulated to inflation has faced **inflationary pressure in the last 5 years**. The cost of raw materials have increased, however, stringent regulatory controls have kept the drug prices stable, exerting **downward pressure on profit margins**. As a result companies have

intensified efforts to reduce the cost of producing drugs by **building resilient supply chains**, relocating support and select core functions to more **cost-effective locations**. Pharma GCCs are leveraging their facilities to **create predictive models for inventory management, cold-chain logistics, and real-time monitoring of drug shipments**. Establishing GCCs is facilitate significant cost savings, allowing companies to reallocate resources toward innovative projects.

Approaching patent cliff: The pharmaceutical industry is approaching a **\$236 billion patent cliff globally** between 2025 and 2030², as patents for blockbuster drugs expire, putting nearly **70 high-revenue products at risk of facing competition**. In response, firms are shifting **R&D towards AI-driven efficiency**, with GCCs reimagining the process from **molecule to market**. GCCs are now taking a centre stage to **help firms gain competitive advantage**, integrating data science into drug discovery, fostering intelligent and outcome-focused research. Due to this, the speed to market and the volume of launches are expected to rise significantly. With more and more GCCs now working towards commercial excellence, organizations are strategically placing themselves to achieve launches at speed and scale.

Rapid adoption of new-age technology: Emerging technologies like AI, IoT and blockchain **are transforming the life sciences industry**, encompassing everything from **drug discovery to precision medicine by analyzing vast datasets to reduce development time and costs**.

Sources: ¹ [global-life-sciences-industry-trends-2025.pdf](#)
² [Drugpatentwatch](#)

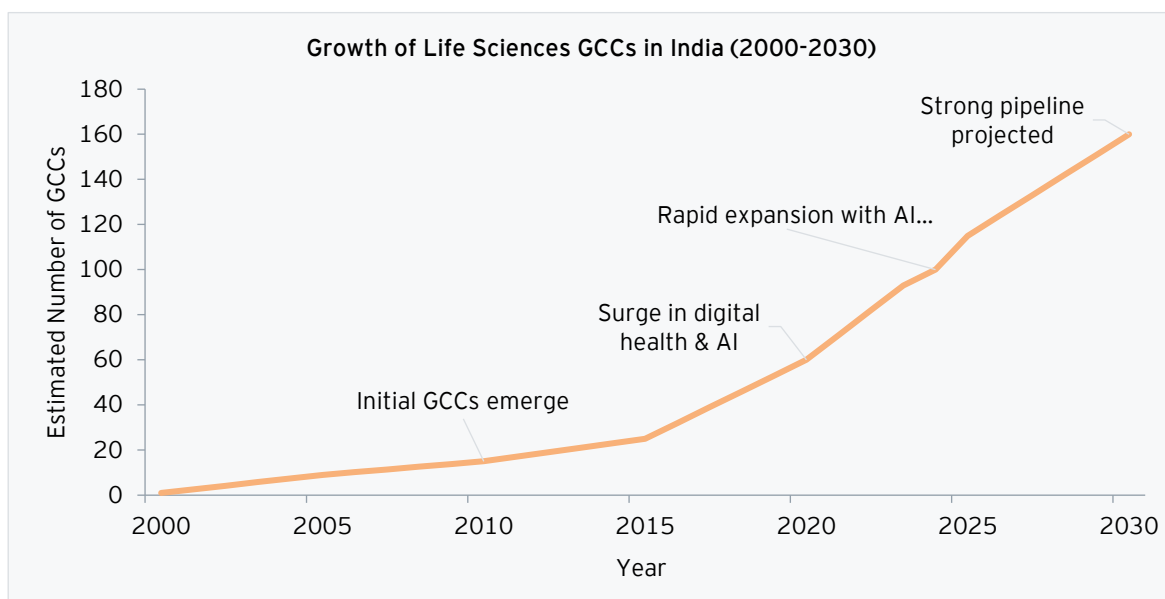
Major life sciences organizations are exploring ways to leverage Generative AI for drug design and data analysis, **enhancing clinical trial efficiency**. Some are even focusing on improving health risks predictions by identifying risk patterns and analyzing real world data from various sources such as Electronic Medical Records (EMRs), wearables, and medical devices. With companies developing AI co-pilots to boost efficiency and productivity throughout the value chain, emphasis should be placed on cultivating a skilled workforce quick to adapt to new-age innovative working methods.

Modern operating model redesigns go far beyond cost-cutting, instead focusing on new ways of internally organizing to enable higher efficiencies, accelerate go-to-market activities, and gain competitive edge. To adapt to the evolving

trends, the companies are now focusing on global excellence and to achieve this they are augmenting competitive capabilities through capability centres and cost-effective locations with access to skilled talent pool.

Of the top 50 life sciences organizations, 23 have their GCCs in India and over 50% of them have entered India over the last five years.³

Last five years have shown a significant uptick in the entry of new GCC logos in India, underlining how GCCs are at the center of decisions for executive leaders preparing for the next decade of uncertainty, high competition, and increasing regulatory scrutiny.



Source: LSHC GCC Outlook for 2025, media and industry reports

Life sciences **GCCs today have evolved into innovation hubs and Global Value Organizations**, equipped with access to top talent across diverse functional capabilities delivering complex value-driven processes. GCCs have increasingly evolved to stay relevant and deliver value to the host organization.

From cost centers to innovation hubs: Life sciences GCCs are no longer just back-office operations—they are becoming strategic innovation engines. Organizations from across the globe, including those headquartered in the US, the UK and Japan have established advanced

GCCs in India that are leading drug discovery, digital therapeutics, and real-world evidence (RWE) analytics; all while driving the outcomes leveraging AI. These centers are directly contributing to pipeline acceleration and patient-centric innovation.

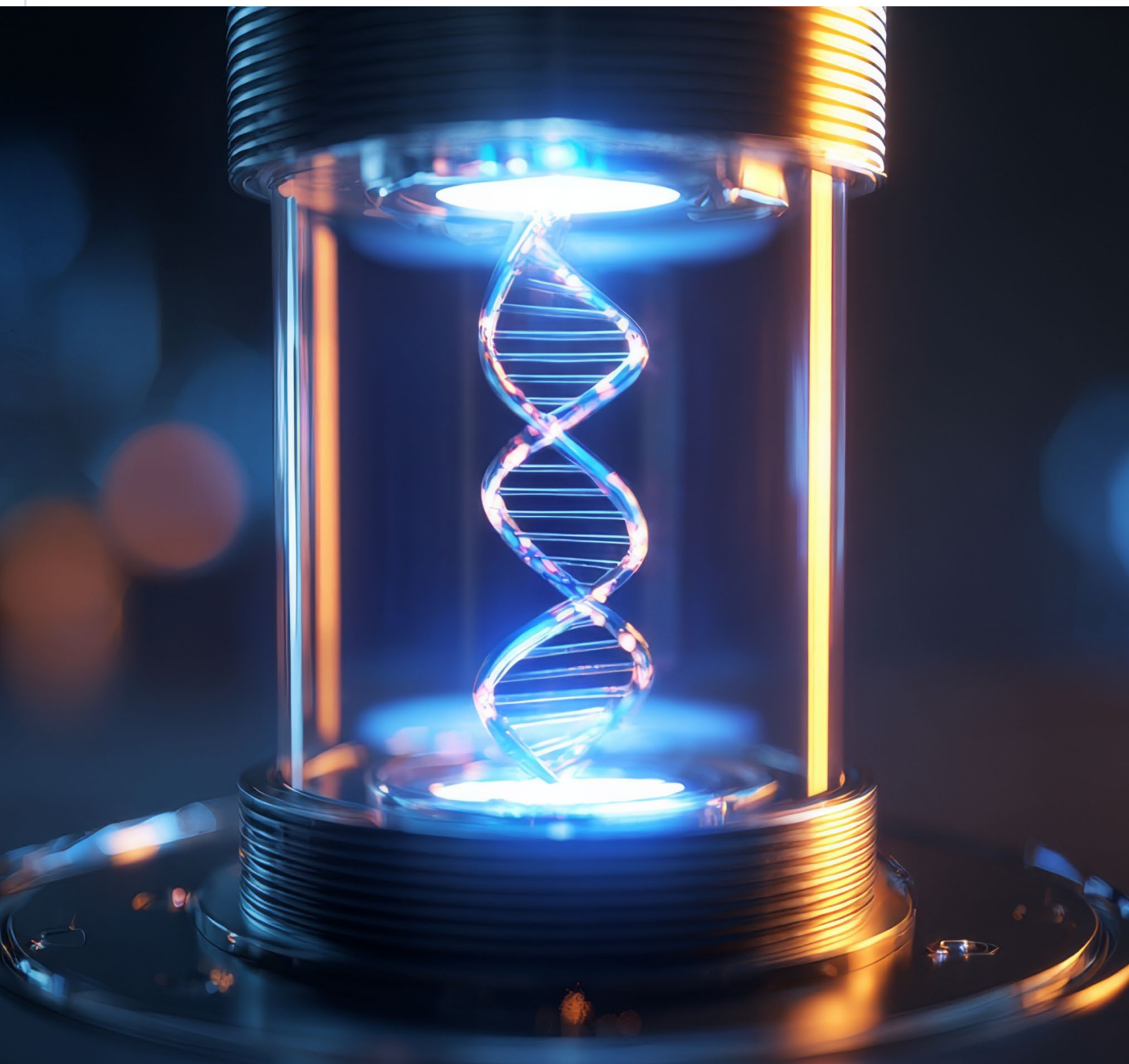
Enabling end-to-end value chain: Modern GCCs are managing integrated functions across the life sciences value chain – from core functions like clinical trial operations, pharmacovigilance, regulatory affairs, supply chain analytics, biostatistics, etc. to enabling functions like Finance, HR, IT, Data Analytics, and more.

Sources: ³ EY research

For instance, organizations like Novo Nordisk have built GCCs in India that support global operations holistically with end-to-end ownership, enhancing agility, compliance, and time-to-market.

Deliver better patient outcomes: As patients become increasingly informed and engaged in their treatment choices, pharmaceutical companies are focusing on creating therapies tailored to individual needs. GCCs are playing a

vital role in implementing patient engagement initiatives, ensuring that patients' perspectives are considered throughout the drug development lifecycle. By emphasizing patient-centricity, life sciences companies can enhance their reputation, foster loyalty, and ultimately achieve improved health outcomes. For instance, Alcon has a vertical 'Digital Health' specifically focused on driving verification and validation of medical devices through real-world evidence.⁴



Sources: ⁴ EY Interviews with life sciences leaders



Reimagining life sciences Global Capability Centers

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Life sciences GCC – India outlook

Worldwide GCC landscape spans four key regions – India, Asia-Pacific, Europe and Latin America – with India leading the pack, having a majority

share of ~60%⁵, followed by Europe and Latin America acting as satellite centers due to their close proximity and multilingual capabilities.

Region	Top Locations	Talent Pool		Cost Advantage	GCC Presence	Key Highlights
		Enabling	Core			
India region	Hyderabad, Bengaluru, Chennai	High 	High 	High 	Very High 	Preferred for highly cost-efficient operations with abundant talent pool to scale operations
APAC	Kuala Lumpur, Manila, Dalian	High 	Medium 	Medium 	High 	Preferred for native Asian language support and local data localization requirements
Europe	Warsaw, Budapest, Lisbon, Bratislava, Cork	High 	Medium 	Medium 	High 	Preferred due to the proximity to key European markets with cultural and linguistic similarities
LATAM	San Jose, Mexico City, Guadalajara, Buenos Aires	Medium 	Low 	Low 	Medium 	Preferred as a cost-effective nearshoring destination for Americas operations with a skilled and bilingual workforce

Incidentally, India has also emerged as the backbone of global life sciences GCC operations, driven majorly by the sustained cost arbitrage coupled with a multitude of other factors such as the deep scientific talent pool for core functions, modern infrastructure, and a mature ecosystem of startups and academia. In recent years, both central and state governments have also started recognizing the strategic importance of this industry and have framed dedicated policies and incentives to fuel their expansion.

Policy support

Recognizing GCCs as key drivers of digital exports and job creation, the central government offers targeted incentives such as simplified foreign investment norms, eased entry clearances, and renewed focus on aiding the GCC landscape in India. Concurrently, multiple state governments also have released their GCC policies in the last few years, offering tailored incentives.

The Karnataka government has released a GCC policy offering multiple incentives for organizations with existing GCCs or setting up new GCCs beyond Bengaluru, while there are still some benefits like 40% capital expenditure subsidy up to INR5 crore for establishing an innovation COE in Bengaluru urban area. Telangana also extends several benefits (rental reimbursements, skilling incentives, and fast-track clearances) as do emerging destinations like Uttar Pradesh and Madhya Pradesh which offer land rebates, subsidies, single-window clearances, employment incentives, etc.⁶

Talent advantage

India offers access to one of the largest and most cost-effective pools of scientific, medical, and digital talent with more than 2.7 million professionals already employed in the life sciences industry and a strong pipeline of over

2.0 million STEM graduates and 110,000-plus in medicine added annually.⁷

Such a strong pipeline enables GCCs to achieve rapid scalability across the core functions of value chain like clinical operations, regulatory affairs, pharmacovigilance, and others.

Infrastructure edge

Mature external ecosystem: Access to Contract Research Organizations (CROs) and academic institutions, and a thriving network of startup incubators and over 100 unicorns⁸ make India an ideal destination for innovation-driven GCC operations.

Office infrastructure: Widespread availability of Grade-A commercial spaces, with access to multiple micro-markets across major metro and Tier II/III cities, support cost-efficient and scalable GCC operations.



Sources: ⁶ State GCC Policies

⁷ EY Research

⁸ Tracxn

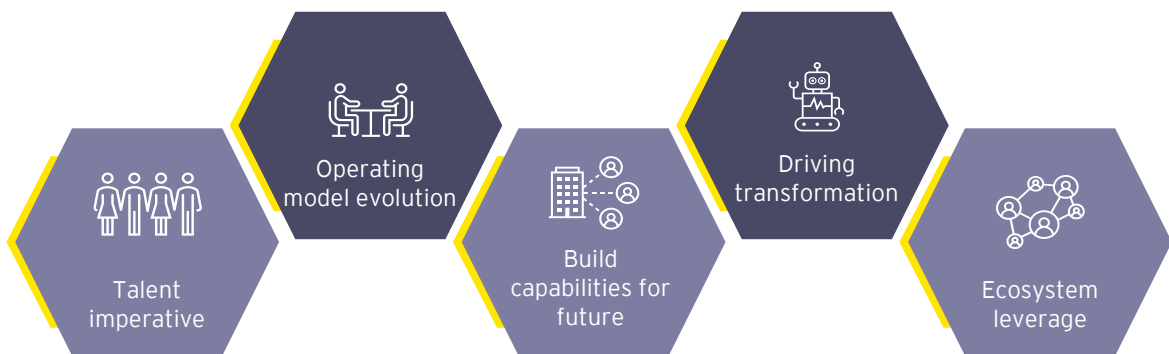
03

What are leading pharma organizations doing?

Leading pharma GCCs are actively looking for opportunities to add extended value to the parent organization by directly targeting business outcomes. Rather than a support center, they are positioning their GCCs as a twin of the headquarters to gain a seat on the table,

accelerating data-driven decisions and providing an environment to innovate. In addition, there is a renewed focus on leveraging the external ecosystem to mitigate risks, tap into extended capabilities, and innovate beyond boundaries.

Fig. 1.1- Five key imperatives for pharma GCCs



1. The talent imperative | From access to advantage

Talent is no longer just a resource—it is a differentiator. GCCs are investing deeply in specialized skills across domains like scientific writing, digital health, and data analytics. Accessibility to skilled multi-disciplinary talent at scale is what is driving the growth now with cost arbitrage being a story of the past.

“

For the previous half decade, the play has been much less about cost, and it's about skills and scale. Over time, the growth of GCC has become more experiential, than cost arbitrage.⁹

- John Dawber, Corporate Vice President & Managing Director, Novo Nordisk GBS

With 70% of the GCC leaders considering innovation as a priority¹, they are doubling down on the innovation agendas driven out of these capability hubs delivering enterprise wide transformations.



The last 2.5 years have not been about cost. The value proposition has always been about talent – the ease of accessing talent in India and the innovation capability that it brings to the table.⁹

- Mrinal Duggal, Head of Sanofi Global Services Hub, Hyderabad

With the growing landscape, talent attraction and retention has also been a priority. Organizations like Alcon have built and are successfully running holistic talent development and engagement programs incorporating several initiatives; from early leadership development programs for female employees to holistic 1:1 mentorship programs for employees across levels to ensure capability build. Structured development programs, early talent pipelines, and purpose-driven engagement are helping GCCs in the industry to attract and retain top-tier professionals in a competitive landscape.

2. Operating model evolution | Becoming business partners

GCCs are being restructured to operate as business partners rather than transactional units.



We are going through an evolution in organization structure. In the reinvented model, each of our commercial entities will interact with horizontal capabilities like SAP, Cybersecurity, Infrastructure, and Analytics... We are certain that our org structure has to evolve to ensure we collaborate effectively and to build more consensus.⁹

- Gorky Chugh, India GBS Leader - IT, Terumo India

Operating model evolution | Becoming business partners (contd.)

This shift is reflected in the growing influence of GCCs over strategic decisions and their integration into enterprise-wide programs. Whether it is contributing to commercial excellence or leading transformation initiatives. GCCs are now working towards not just earning a seat at the table, but build influence in the executive decision making.



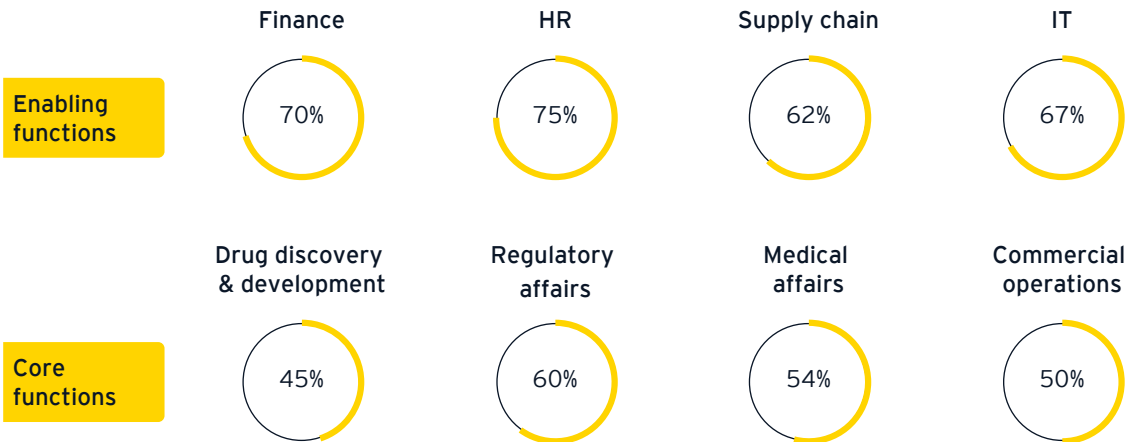
We do not discriminate with the GCC by seeing it as an extended arm, but this is The Arm for the organization... Whenever we do goal setting for the year, it directly comes from the CXOs, ensuring alignment with organizational objectives.⁹

- Vineet Dwivedi, Global Head, Alcon Global Services

3. Build capabilities for future | Expanding depth and breadth

GCCs are moving fast to seize the opportunity of scaled transformation and enhanced strategic capabilities across the value-chain. To gain a strategic edge, many companies have directly leapfrogged to high-value functions like R&D (medical affairs, regulatory affairs, pharmacovigilance, etc.), quality, and commercial excellence. Some organizations have even established core R&D labs in India, underscoring the trust placed in GCCs to deliver end-to-end ownership. This evolution reflects a deliberate initiative to build capabilities that are both deep in expertise and broad in impact.

The GCC penetration across core functions has also seen a significant uprise over the last five years:



Sources - EY Research

GCCs like Merck KGaA have established highly evolved core capabilities, directly influencing product design, development and marketability; augmenting product innovation through market intelligence.

“

Since the time we were established in 2015, we were always a part of the life sciences business; rather than being extended enabling functions. While we started with customer excellence and built confidence there, we swiftly ventured into high-end scientific work and established our footprint in quality and regulatory management, besides strategic marketing and innovation.⁹

- Harsha Arora, Head of India GES, Merck KGaA

She also added,

By delivering quality, we earned the right to play in core fields, and now by partnering for business outcomes, we eventually earned the right to innovate.⁹

A host of other leading life sciences GCCs are now building capabilities that directly impact business outcomes - be it through core capabilities or driving product or process innovation from the front.

4. Driving transformations | Leading from the front

GCCs are increasingly positioned as transformation engines, especially in areas like AI and automation. While regulatory complexity in life sciences demand caution, GCCs are piloting use cases that demonstrate tangible ROI. The emphasis is on solving business problems, improving internal processes, and enabling enterprise-wide digital transformation – often starting with quick wins and scaling from there. An American multinational pharmaceutical company has established its presence with innovative capabilities in drug discovery domain, while a Japanese pharma giant has set up its 'Innovation Capability Center' to drive innovation directly targeting business outcomes like medical writing timelines and speed to market through AI-led initiatives driven centrally.

As per the 2024 EY GCC Pulse Survey, 70% of GCC leaders are investing in GenAI and Agentic AI, and 76% are integrating their talent into global transformation initiatives. In addition, all interviewed GCC leaders unanimously highlighted the importance of measured focus on investments in GenAI and Agentic AI. While the potential is well embraced, there is caution around leveraging AI in a highly regulated environment. Hence, 76% of GCC leaders are investing in cybersecurity enhancements.

Sources: ⁹ EY Interviews with life sciences leaders

Terumo India is exploring AI use cases to enhance cybersecurity, while Alcon is investing in internal process efficiency. To solve ground problems, Merck KGaA has established an internal AI platform and organizes internal Hackathons to crowd source and fund top innovative ideas and collaborate globally in AI programs. With this, Merck has successfully released digital twins for labs to run simulations, drastically reducing the R&D time.⁶

5. Ecosystem leverage | Tapping into India's innovation network

India's vibrant ecosystem – comprising startups, academic institutions, and government initiatives – is becoming a strategic asset for GCCs. Leveraging the rich startup ecosystem, GCCs are directly targeting quick wins.

“

By partnering with an AI startup, our innovation team plugged in their proprietary tool into medical affairs function to produce PowerPoint decks for doctors and affiliates to use globally for clinical trials and protocols, saving around 80% of the time.⁹

- John Dawber, Corporate Vice President & Managing Director, Novo Nordisk GBS

Organizations are also co-creating curricula with universities, collaborating with vendors, and showcasing India's innovation potential to global stakeholders.

“

In our initial stages, we had created academia relationships, and in a week every year, we invite students from the partner institutes to visit our facilities across GCCs, and hold panel discussions with them as audience. This creates initial attraction and stickiness.⁹

- Harsha Arora, Head of India GES, Merck KGaA

This ecosystem approach not only strengthens the talent pipeline but also reinforces India's position as a preferred hub for global roles. In addition, with the industry demand expanding, there is an understood need to enhance collaborations to augment the future for all.

“

We need to invest a lot more than what we are doing as an industry to prepare talent for the future – Work together with different organizations as a consortium, identify academic institutions to develop relevant courseware, implement the courses with the government – in order to make ourselves future safe.⁹

- Mrinal Duggal, Head of Sanofi Global Services Hub, Hyderabad



04

Future outlook: Unlocking value from next-gen GCCs

As life sciences organizations continue to navigate complexity and pursue innovation, the next generation of GCCs will be instrumental in shaping enterprise success. Their evolution will be defined by three key imperatives:

Driving innovation as strategic partners

GCCs will move beyond execution to co-owning innovation. By embedding themselves in core R&D, digital transformation, and patient-centric initiatives, they will act as strategic partners – accelerating breakthroughs and enabling differentiated value propositions. The operating model will shift from transactional oversight to outcome-based partnerships.



By delivering quality, we earned the right to play in core fields, and now by partnering for business outcomes, we have earned the right to innovate.

- Harsha Arora, Head of India GES, Merck KGaA

Future-proofing GCC talent

To sustain momentum, GCCs must invest in holistic talent development. This includes upskilling in emerging technologies like GenAI, bioinformatics, and digital health, as well as cross-skilling across domains to build agile, multi-disciplinary teams capable of solving complex business problems. GCCs will need to take a broader role by enabling talent exchange and being ready for infusing the next generation of global roles through these centers.



Majority of the demographics of who we have hired are from consulting and IT services firms. We are not just competing with other GCCs, but also with the service companies of the world.

- Gorky Chugh, India GBS Leader - IT, Terumo India

Building resilience into the value chain for enhanced enterprise value

Next-gen GCCs will unlock new layers of value by building complimentary, and not duplicate, capabilities – scaling their impact across geographies and functions. The narrative will move beyond functional delivery towards platform-based ecosystem driving business outcomes, aiding resilience across value chain.



Finding a seat at the table is one aspect, while finding a voice at the table is another. Now more than ever, GCCs need to go even one step beyond, to work towards building an influence on the table.

- Vineet Dwivedi, Global Head, Alcon Global Services

Contacts



Arindam Sen

Partner and GCC Sector Lead,
EY India
Email: arindam.sen@in.ey.com



Nikhil Kumar

Partner,
Life sciences GCC Sector Lead,
EY India
Email: nikhil1.kumar@in.ey.com



Sonam Mahajan

Partner,
Business Consulting - Life Sciences,
EY India
Email: sonam.mahajan@in.ey.com

Co-authors



Nitin Aggarwal

Manager,
Business Consulting,
EY India



Annu Singh

Manager,
Business Consulting,
EY India



Himanshu Modi

Senior Consultant,
Business Consulting,
EY India

EY offices

Ahmedabad

22nd Floor, B Wing, Privilon
Ambli BRT Road, Behind Iskcon
Temple
Off SG Highway
Ahmedabad - 380 059
Tel: + 91 79 6608 3800

8th Floor, Building No. 14A
Block 14, Zone 1
Brigade International Financial
Centre
GIFT City SEZ
Gandhinagar - 382355, Gujarat
Tel +91 79 6608 3800

Bengaluru

12th & 13th Floor
"UB City", Canberra Block
No.24 Vittal Mallya Road
Bengaluru - 560 001
Tel: + 91 80 6727 5000

Ground & 1st Floor
11, 'A' wing
Divyasree Chambers
Langford Town
Bengaluru - 560 025
Tel: + 91 80 6727 5000

3rd & 4th Floor
Marksquare
#61, St. Mark's Road
Shantala Nagar
Bengaluru - 560 001
Tel: + 91 80 6727 5000

1st & 8th Floor, Tower A
Prestige Shantiniketan
Mahadevapura Post
Whitefield, Bengaluru - 560 048
Tel: + 91 80 6727 5000

Bhubaneswar

8th Floor, O-Hub, Tower A
Chandaka SEZ, Bhubaneswar
Odisha - 751024
Tel: + 91 674 274 4490

Chandigarh

Elante offices, Unit No. B-613 & 614
6th Floor, Plot No- 178-178A
Industrial & Business Park, Phase-I
Chandigarh - 160 002
Tel: + 91 172 6717800

Chennai

6th & 7th Floor, A Block,
Tidel Park, No.4, Rajiv Gandhi Salai
Taramani, Chennai - 600 113
Tel: + 91 44 6654 8100

Delhi NCR

Aikyam
Ground Floor
67, Institutional Area
Sector 44, Gurugram - 122 003
Haryana
Tel: + 91 124 443 4000

3rd & 6th Floor, Worldmark-1
IGI Airport Hospitality District
Aerocity, New Delhi - 110 037
Tel: + 91 11 4731 8000

4th & 5th Floor, Plot No 2B
Tower 2, Sector 126
Gautam Budh Nagar, U.P.
Noida - 201 304
Tel: + 91 120 671 7000

Hyderabad

The skyview 10
18th Floor, "South lobby"
Survey No 83/1, Raidurgam
Hyderabad - 500 032
Tel: + 91 40 6736 2000

Jaipur

9th floor, Jewel of India
Horizon Tower, JLN Marg
Opp Jaipur Stock Exchange
Jaipur, Rajasthan - 302018

Kochi

9th Floor, ABAD Nucleus
NH-49, Maradu PO
Kochi - 682 304
Tel: + 91 484 433 4000

Kolkata

22 Camac Street
3rd Floor, Block 'C'
Kolkata - 700 016
Tel: +91 33 6615 3400

6th floor, Sector V,
Building Omega, Bengal Intelligent
Park, Salt Lake Electronics Complex,
Bidhan Nagar
Kolkata - 700 091
Tel: +91 33 6615 3400

Mumbai

14th Floor, The Ruby
29 Senapati Bapat Marg
Dadar (W), Mumbai - 400 028
Tel: + 91 22 6192 0000

5th Floor, Block B-2
Nirlon Knowledge Park
Off. Western Express Highway
Goregaon (E)
Mumbai - 400 063
Tel: + 91 22 6192 0000

3rd Floor, Unit No.301
Building No.1, Mindspace-Gigaplex
IT Park, MIDC, Plot No. IT-5
Airoli Knowledge Park
Airoli West, Navi Mumbai - 400 708
Tel: + 91 22 6192 0003

18th Floor, Altimus
Pandurang Budhkar Marg, Worli
Mumbai - 400 018
Tel: + 91 22 6192 0503

Pune

C-401, 4th Floor
Panchshil Tech Park, Yerwada
(Near Don Bosco School)
Pune - 411 006
Tel: + 91 20 4912 6000

10th Floor, Smartworks
M-Agile, Pan Card Club Road
Baner, Pune - 411 045
Tel: + 91 20 4912 6800

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