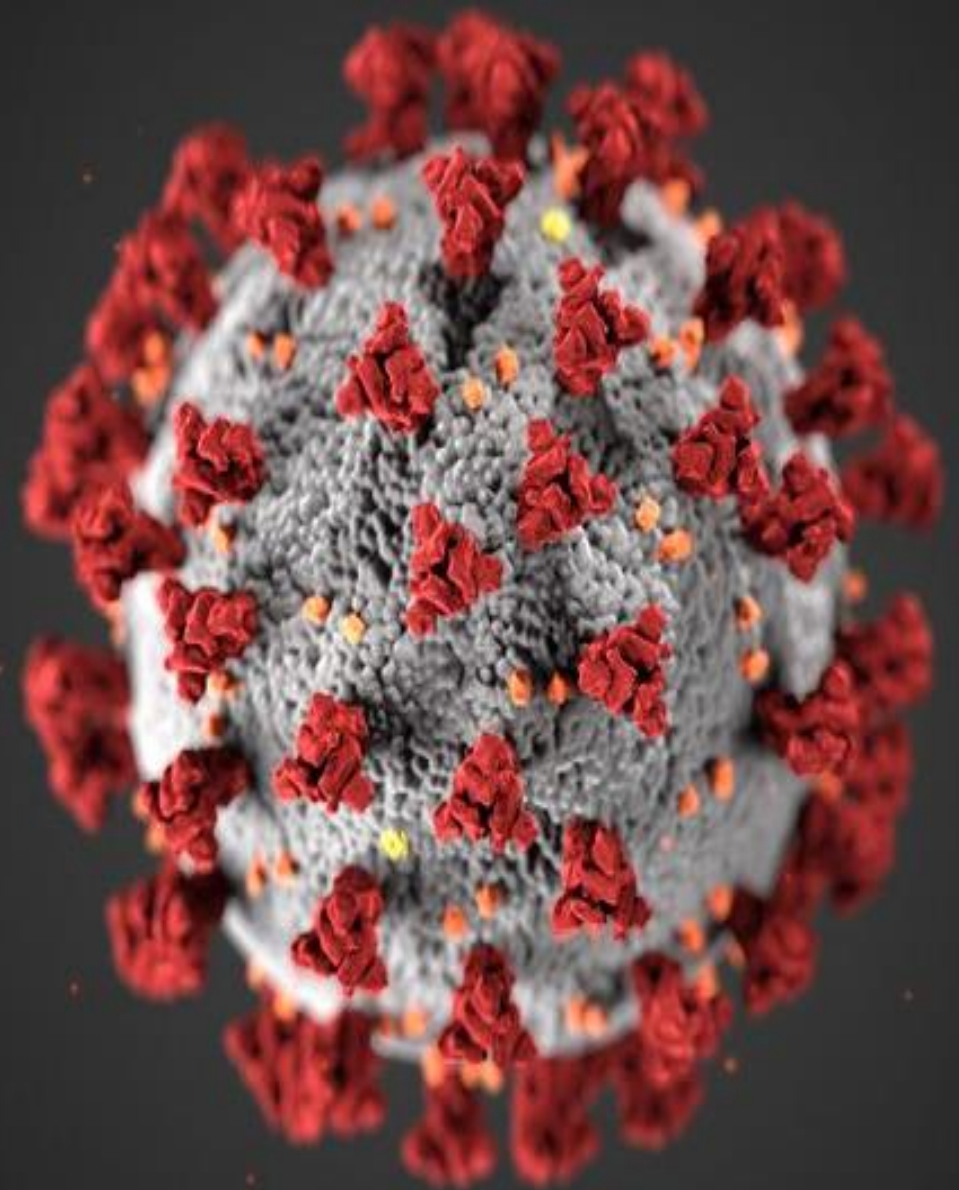


# Pulse Survey Results: India Inc's Response To COVID-19

*Response | Mitigation*



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1	Study Overview
2	Participant Demographics
3	Response Analysis
4	How Should Organizations Respond
5	Additional Information

# Study Overview

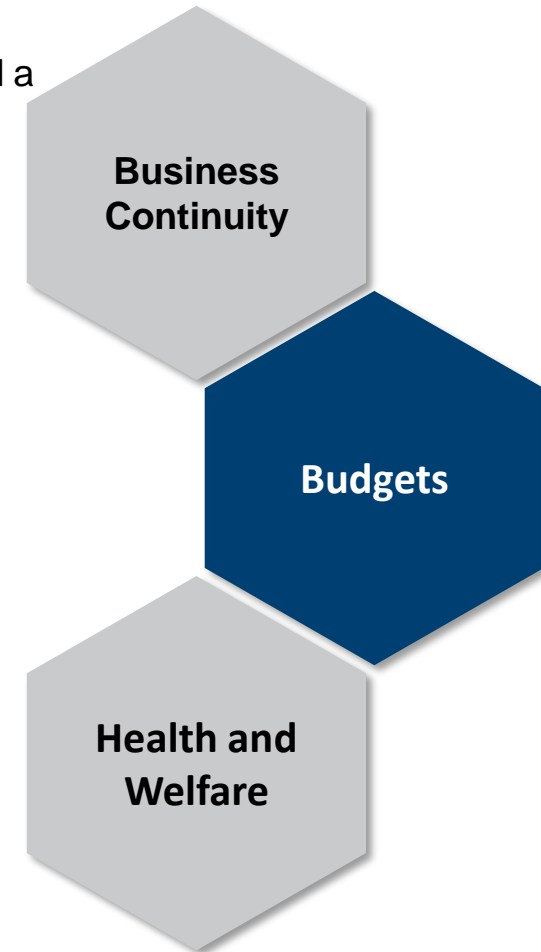
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In light of the rapidly evolving COVID-19 pandemic and its widespread HR and Business implications, we created a pulse survey on human resources and compensation measures being put in place by companies in India as they move to keep employees safe and adjust to an increasingly volatile market.

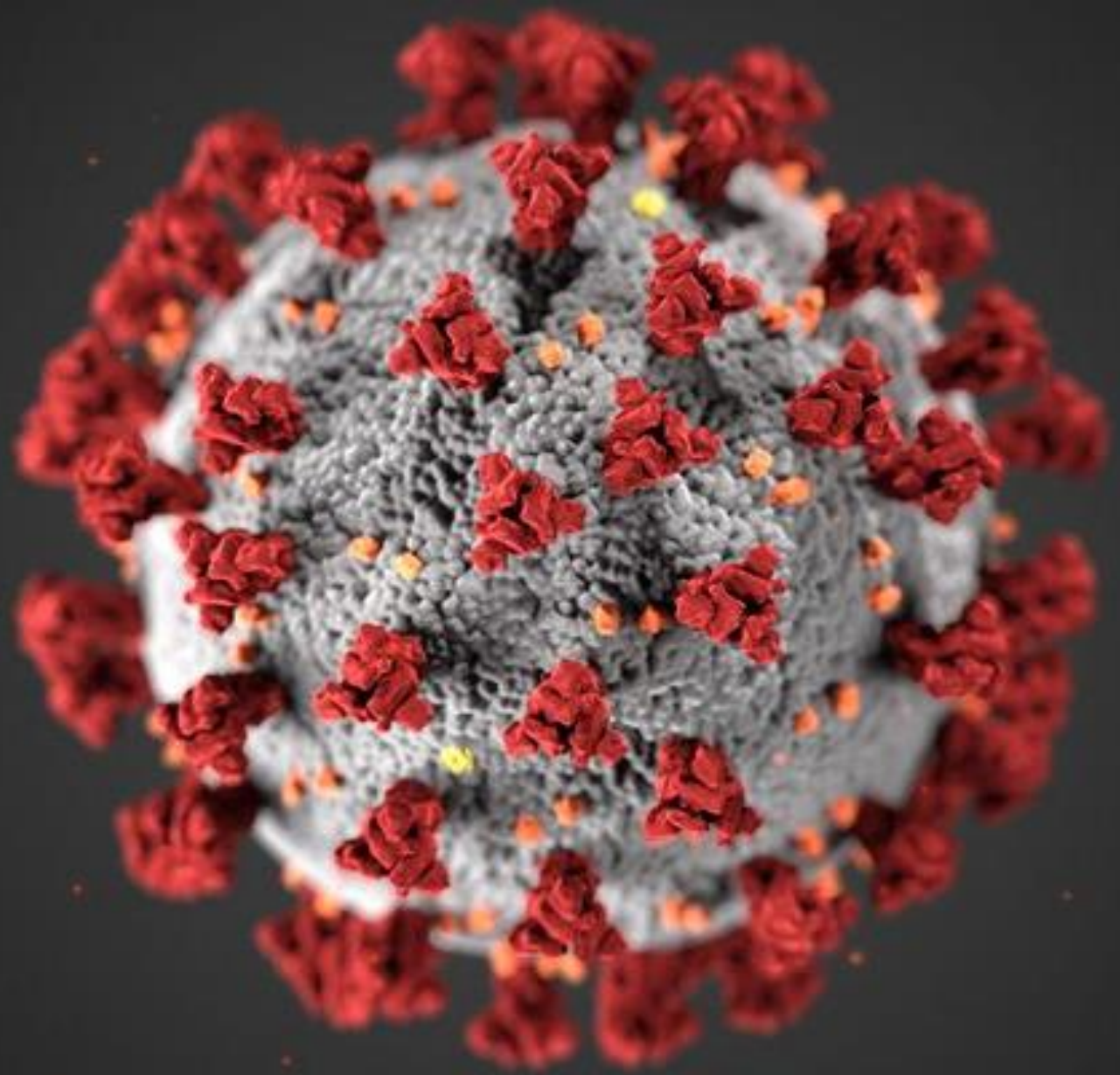
This study includes questions on:

- Compensation increases and Bonus payout actions related to the outbreak
- Employee communication
- Employee Health and Welfare
- Work-from-home and other mobility measures

This study garnered submission from a total of over 400 organizations across industry segments. This report summarizes the results.

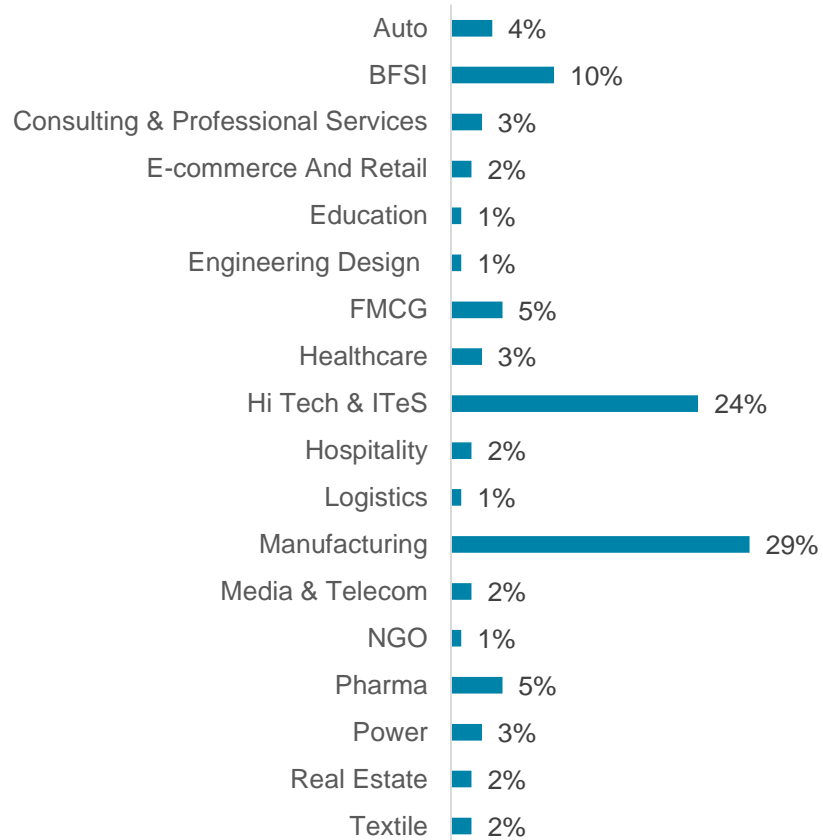


# ***Participant Demographics***

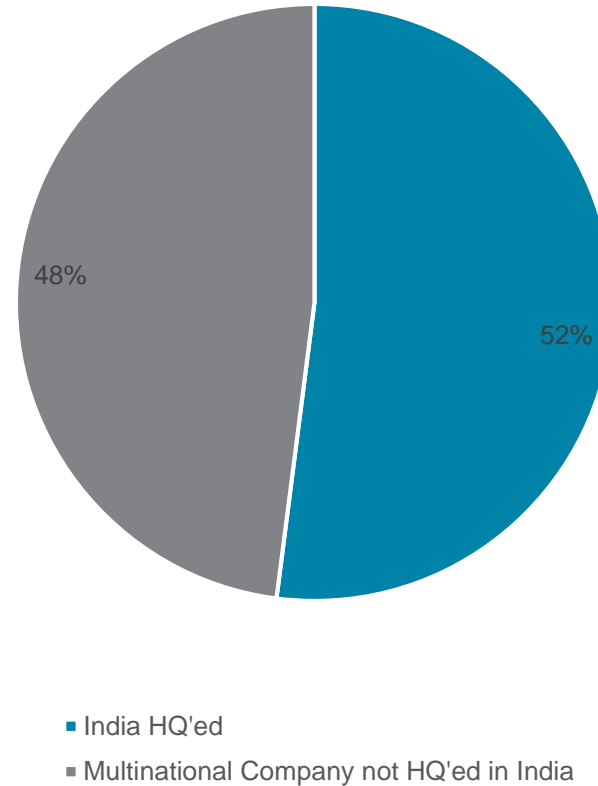


# Participant Demographics

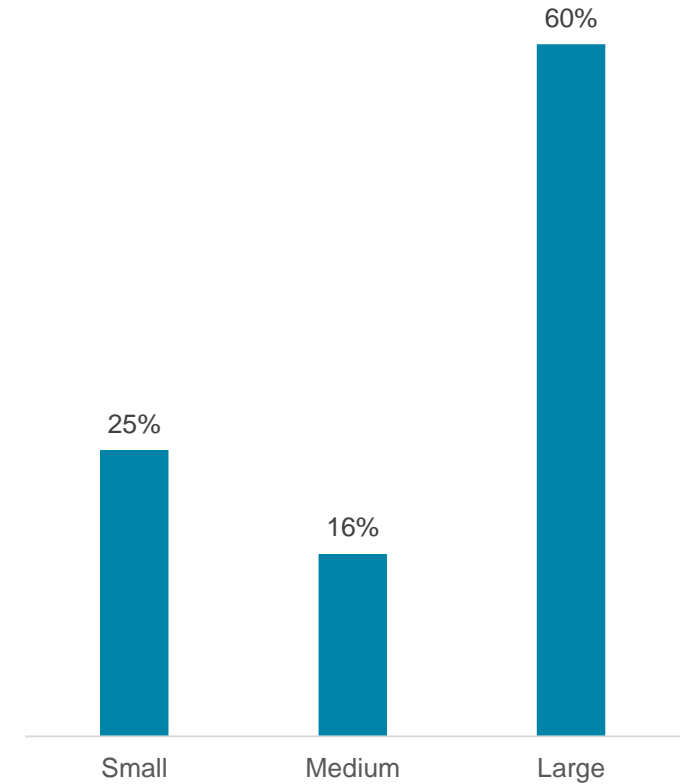
### Distribution



### HQ Distribution



### Headcount Distribution



# Participant Demographics

For the analysis in the study the following sub industries have been classified under two broad categories

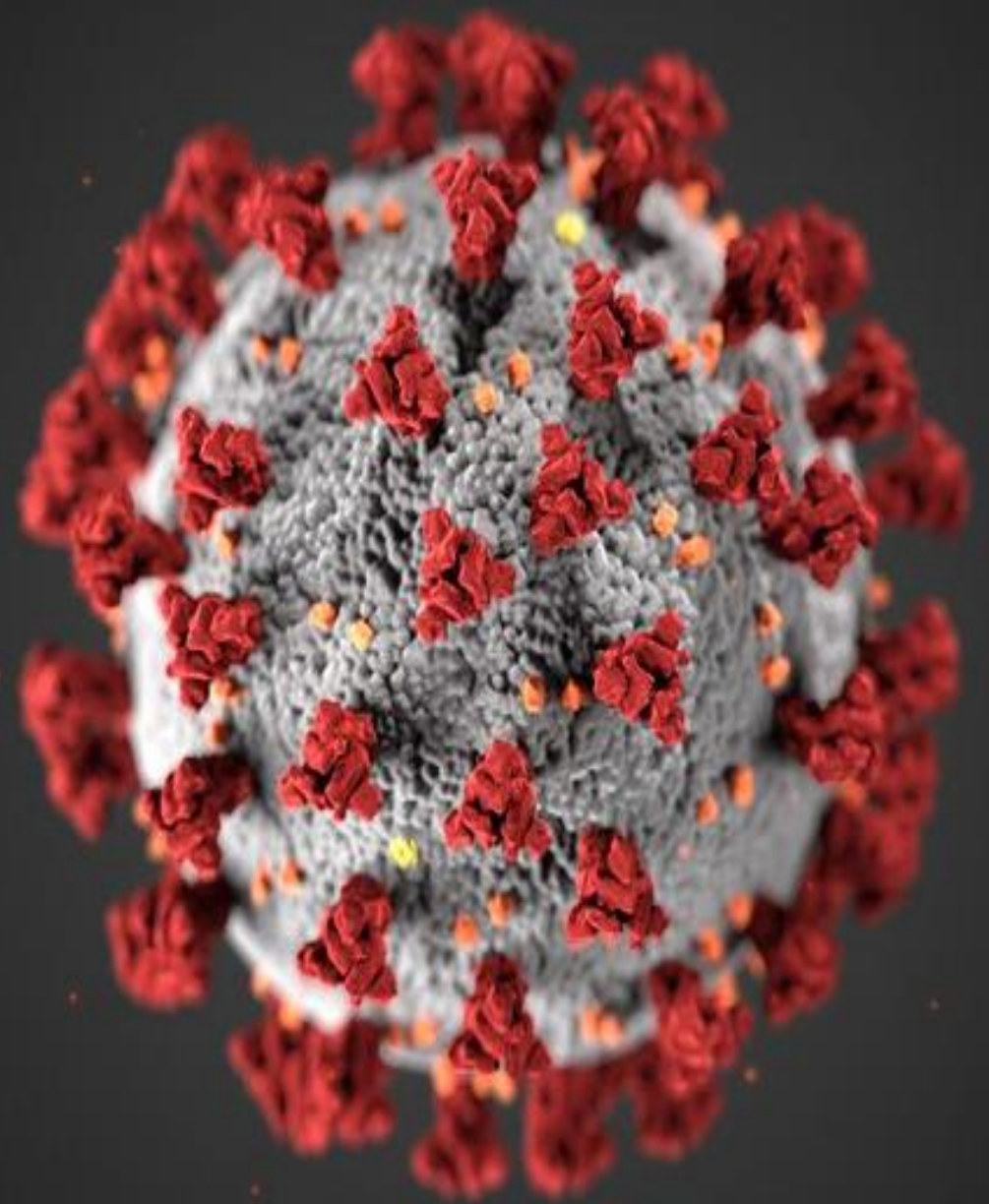
Manufacturing	Services	Services
Auto	Engineering Design	Hi Tech & ITeS
FMCG	BFSI	Logistics
Manufacturing	Consulting & Professional Services	Healthcare
Pharma	Ecommerce & Retail	Education
Power	Hospitality	NGO
Textile	Real Estate	Media & Telecom

For the analysis in the study the following headcount size have been classified under three broad categories

Segment	Headcount
<b>Small</b>	< 500 Employees
<b>Medium</b>	500-1000 Employees
<b>Large</b>	>1000 Employees



***India Inc.'s Response To  
Compensation And Bonus Decisions***

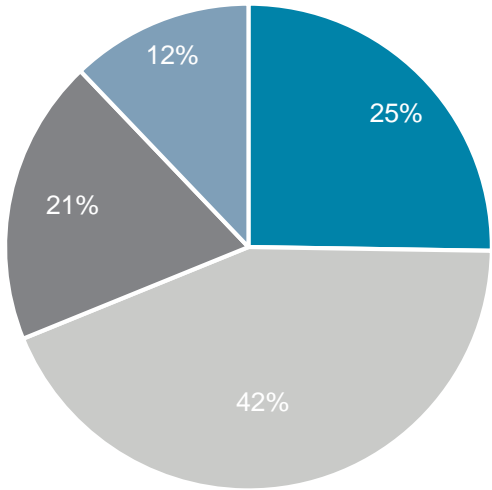


# India's Inc's Response To COVID-19

*Is India Inc. preparing to rationalize costs with a recession scenario looming in the horizon?*

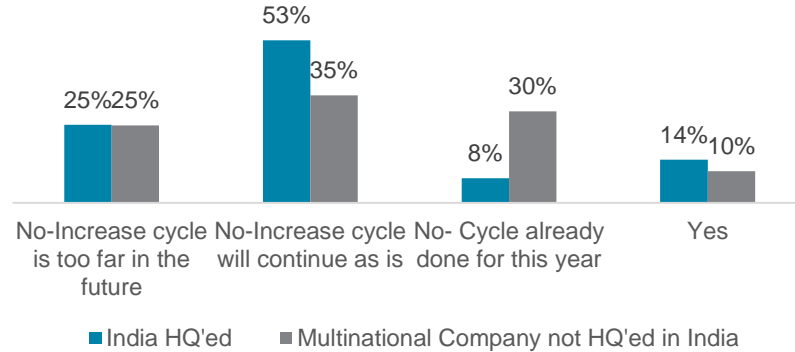
Aon asked India Inc - "Do you plan to defer the compensation increases for 2019-20?"

Overall

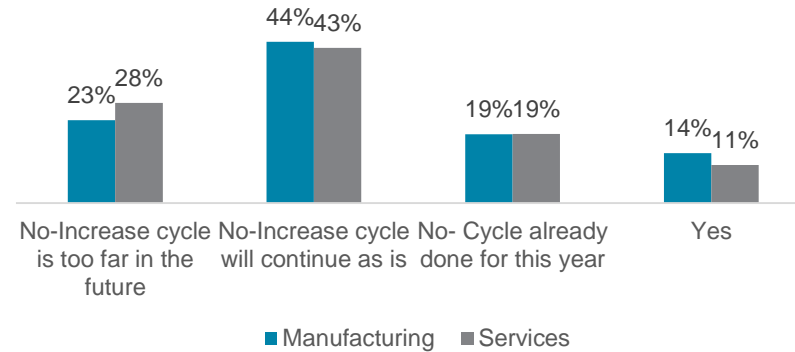


- No-Increase cycle is too far in the future
- No-Increase cycle will continue as is
- No-Cycle already done for this year
- Yes

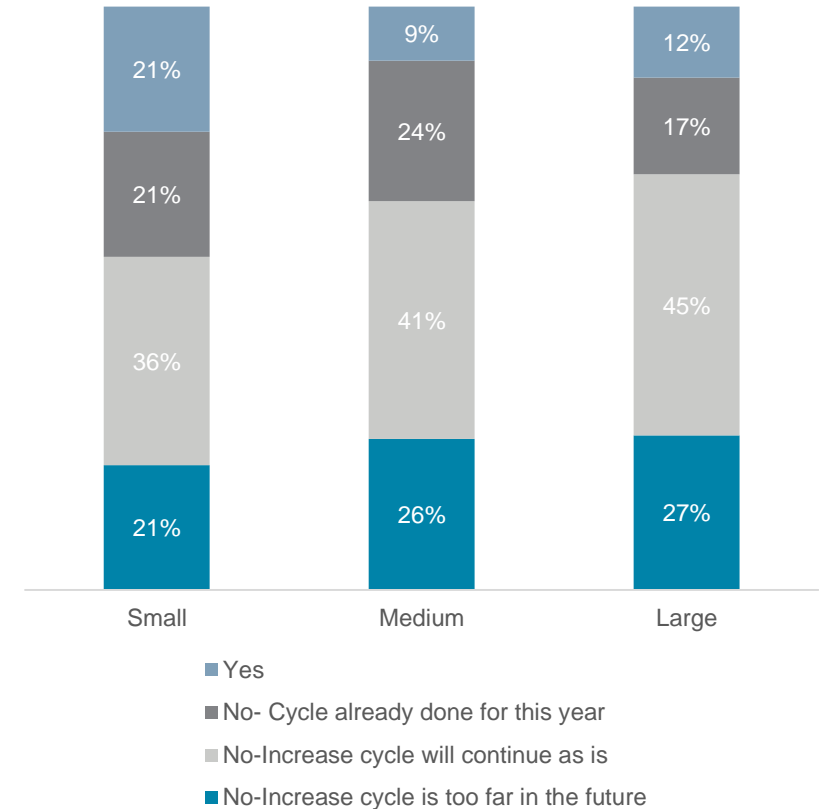
By HQ



By Industry



By Headcount Size



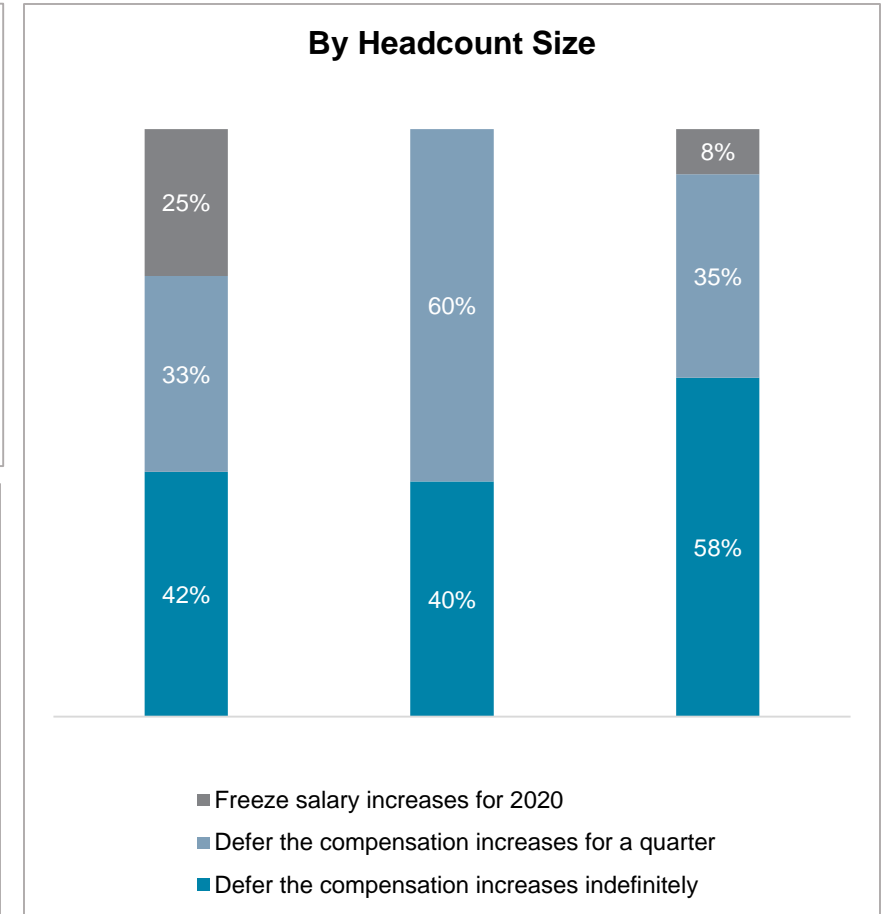
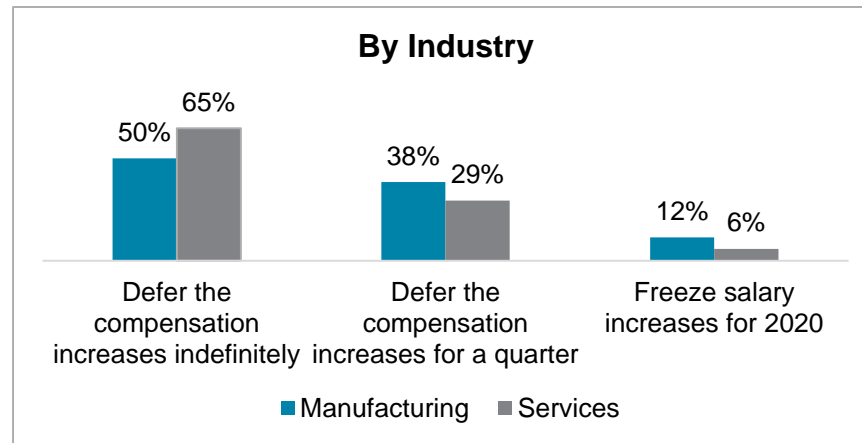
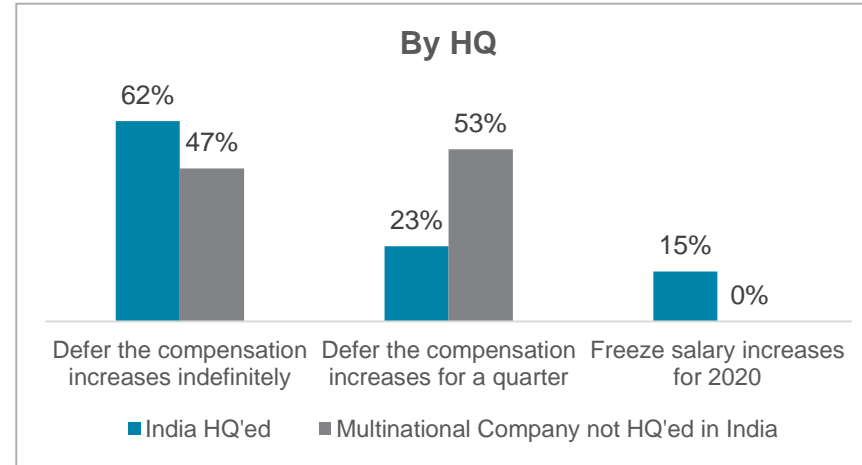
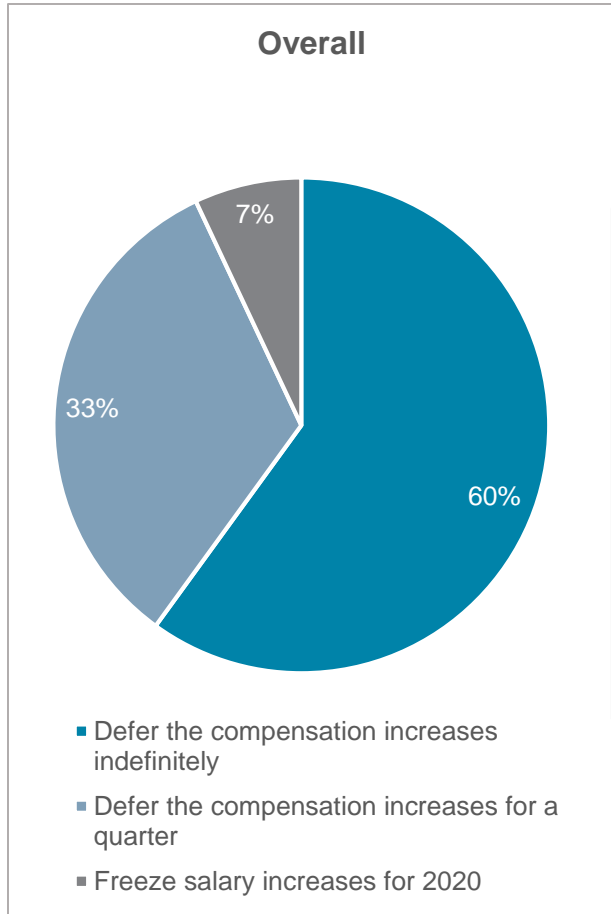
Very few organizations (12%) across sectors are planning to defer their compensation increases, however small sized organizations seem more reactive to future cost constraints as compared to other organizations



# India's Inc's Response To COVID-19

*Is India Inc. preparing to rationalize costs with a recession scenario looming in the horizon?*

Aon asked India Inc - "How long do you plan to defer the compensation increases for 2019-20?"

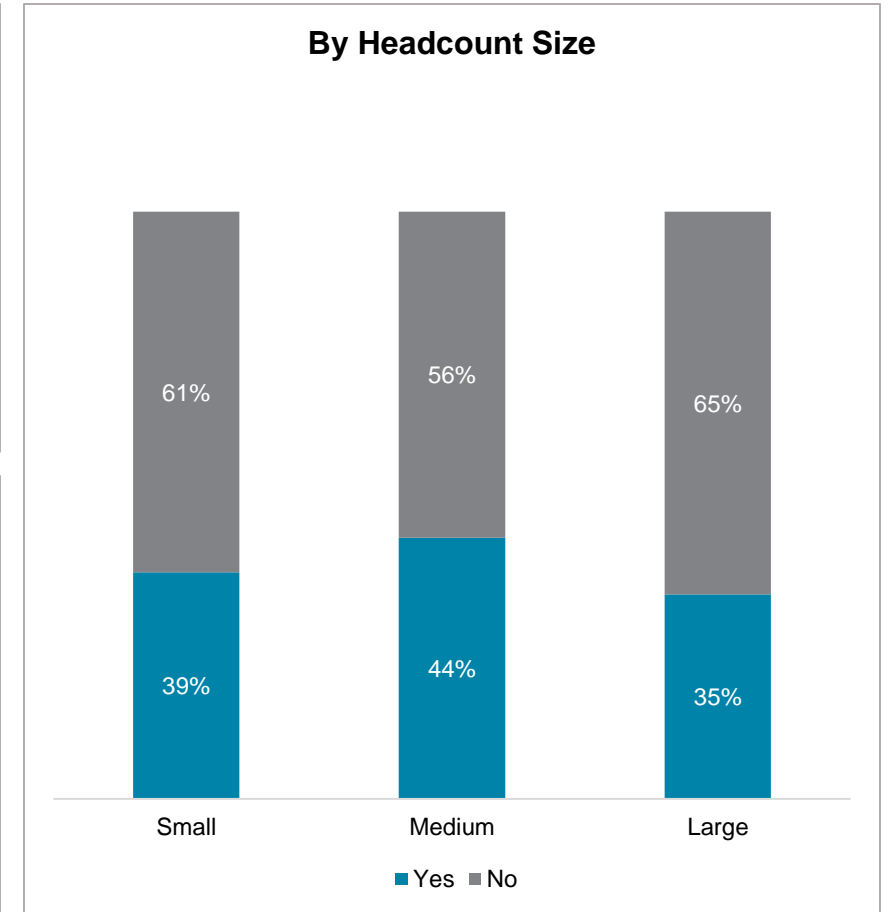
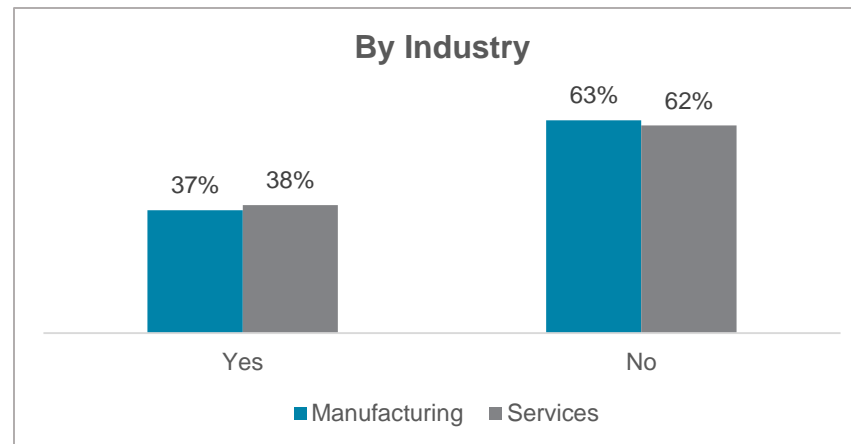
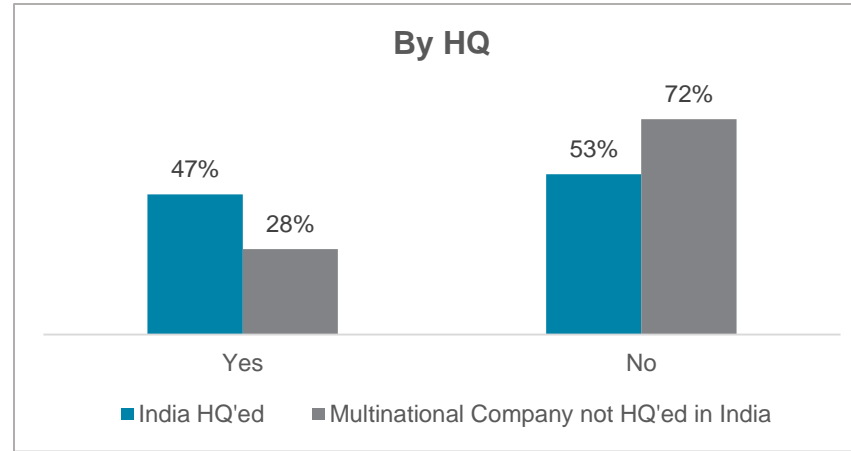
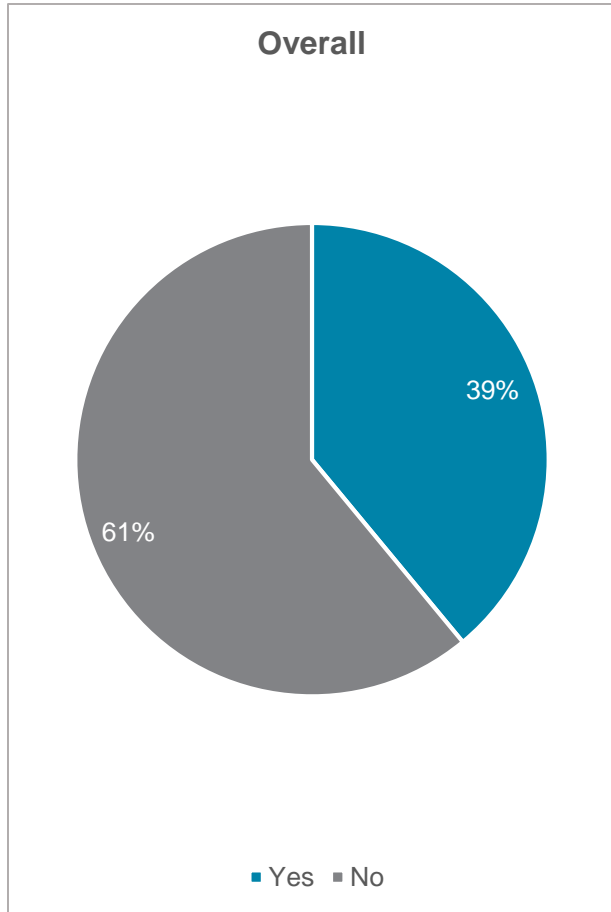


From the 12% of the organizations that are planning to defer their increases, most organizations are waiting to understand the impact of the pandemic

# India's Inc's Response To COVID-19

*Is India Inc. preparing to rationalize costs with a recession scenario looming in the horizon?*

Aon asked India Inc - "Do you plan to revise your projected increases for 2019-20 in light of the economic uncertainty caused by COVID-19?"



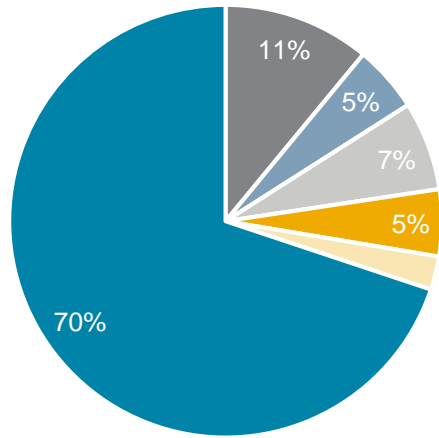
Majority of the organizations do not plan to revise the projected increase for 2020, however Indian HQ'ed organizations seem more open to revising their projected increases as compared to other organizations

# India's Inc's Response To COVID-19

*Is India Inc. preparing to rationalize costs with a recession scenario looming in the horizon?*

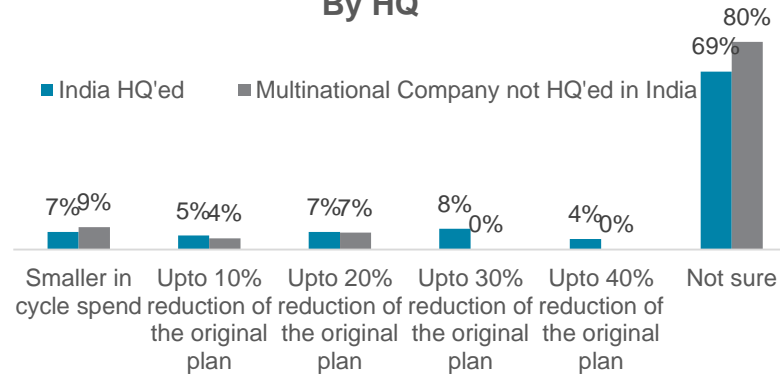
Aon asked India Inc - "Do you plan to revise your projected increases for 2019-20 in light of the economic uncertainty caused by COVID-19?"

Overall

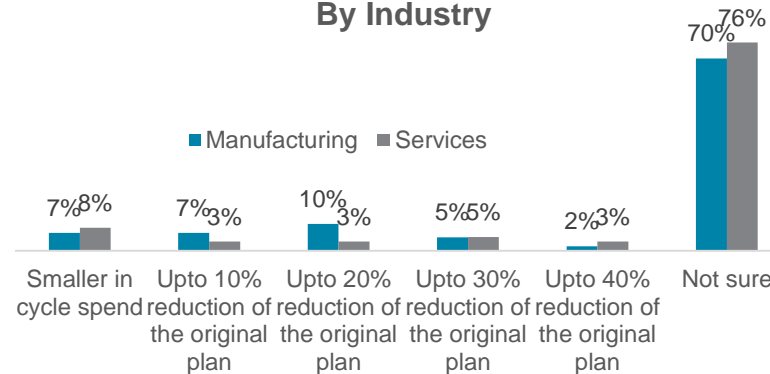


- Smaller in cycle spend
- Upto 10% reduction of the original plan
- Upto 20% reduction of the original plan
- Upto 30% reduction of the original plan
- Upto 40% reduction of the original plan
- Not sure

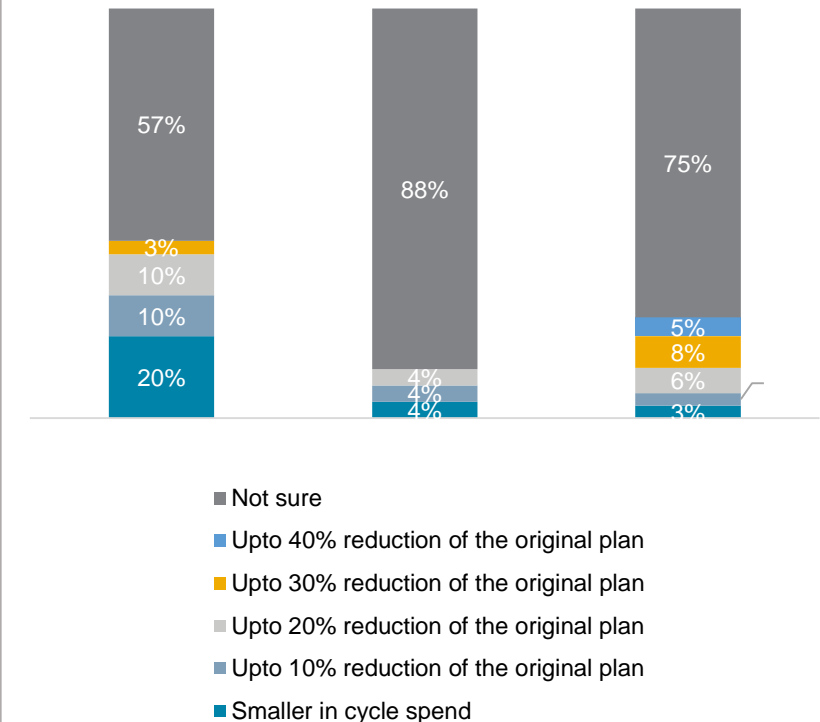
By HQ



By Industry



By Headcount Size



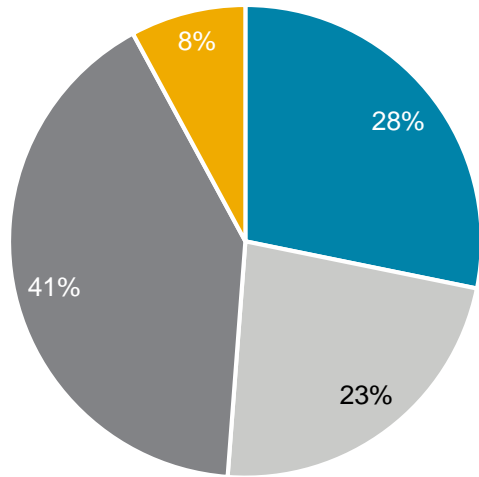
Amongst the 37% of the organizations that are planning to revise their increases, most organizations are waiting to understand the impact of the pandemic

# India's Inc's Response To COVID-19

*Is India Inc. preparing to rationalize costs with a recession scenario looming in the horizon?*

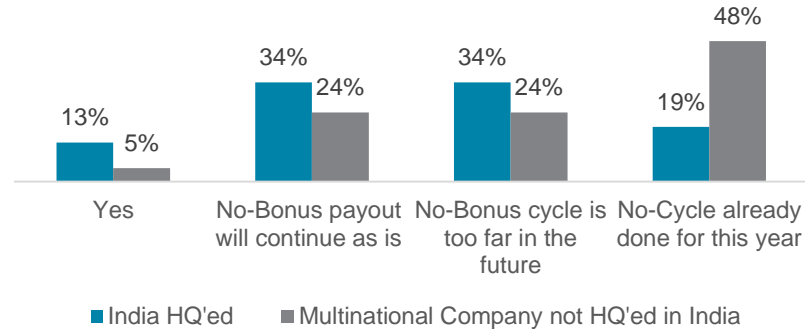
Aon asked India Inc - "Do you plan to defer bonus payouts for the year 2019-20?"

**Bonus Payout**

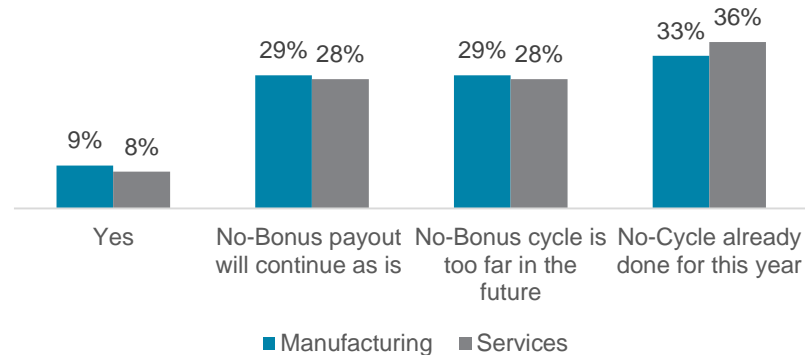


- No- Cycle already done for this year
- No- Bonus cycle is too far in the future
- No- Bonus payout will continue as is
- Yes

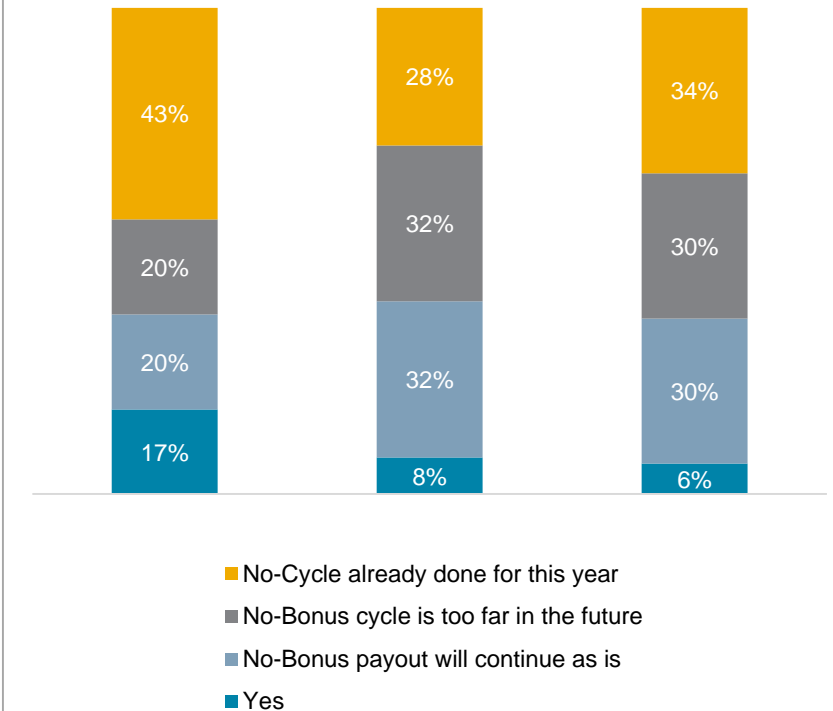
**By HQ**



**By Industry**



**By Headcount Size**



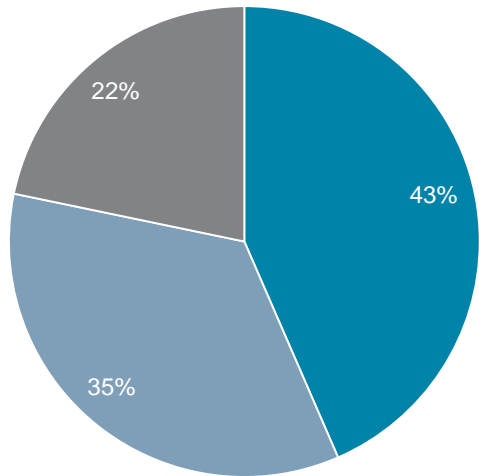
Many organizations across sectors have already completed the bonus cycle for the year. While 28% of organizations do not plan to defer payouts on the premise that bonus is paid for last year's performance and hence already accrued, very few organizations (9%) plan to defer the cycle.

# India's Inc's Response To COVID-19

*Is India Inc. preparing to rationalize costs with a recession scenario looming in the horizon?*

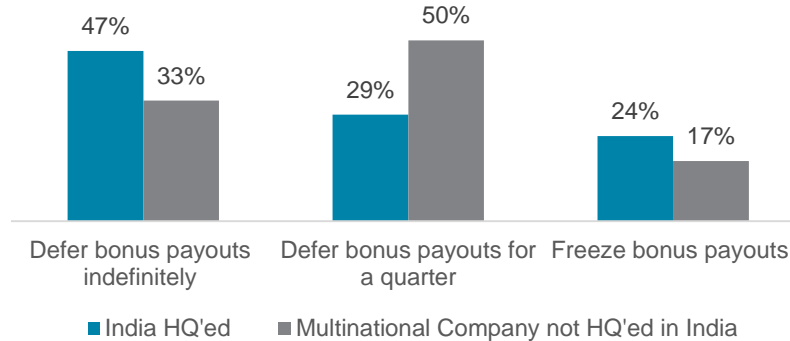
Aon asked India Inc - "How long do you plan to defer bonus payouts for the year 2019-20?"

## Overall

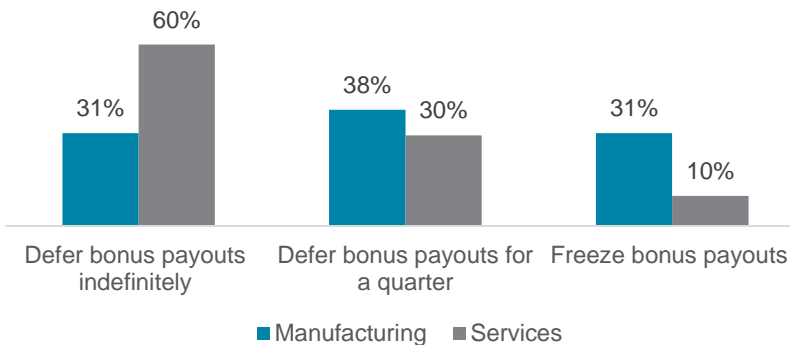


- Defer bonus payouts indefinitely
- Defer bonus payouts for a quarter
- Freeze bonus payouts

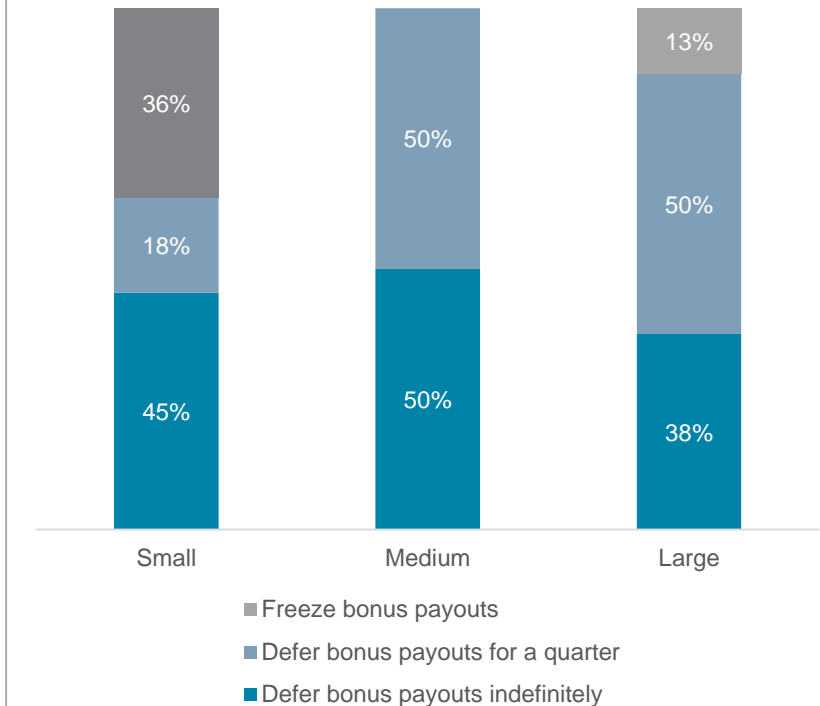
## By HQ



## By Industry



## By Headcount Size

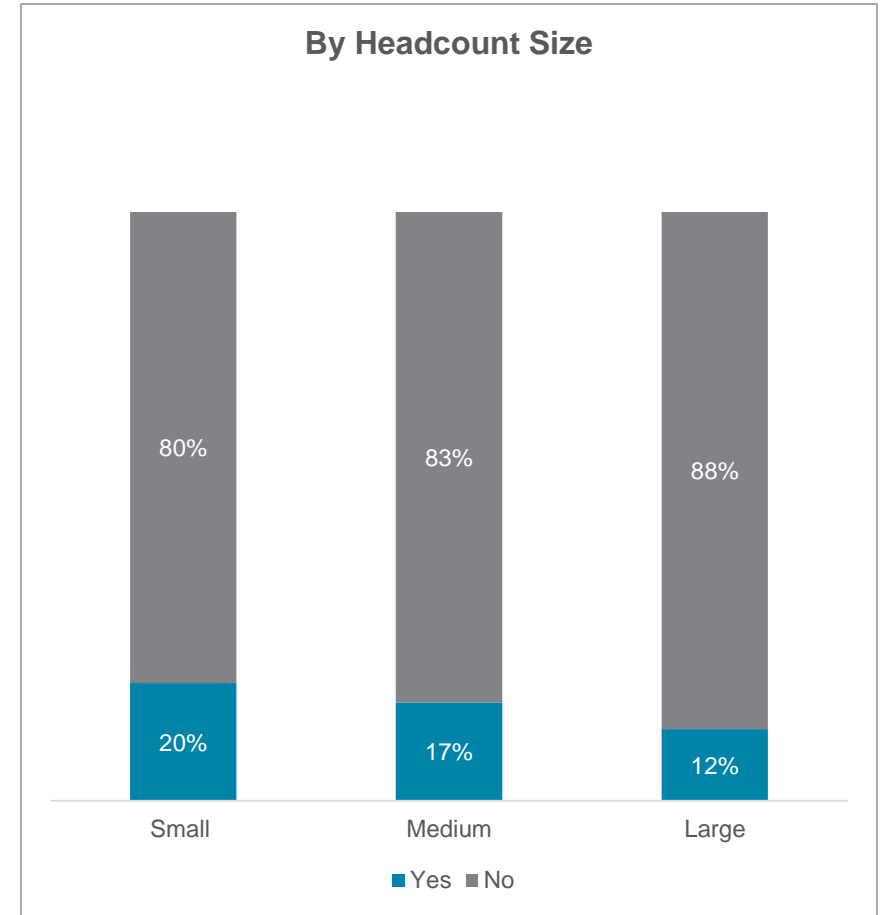
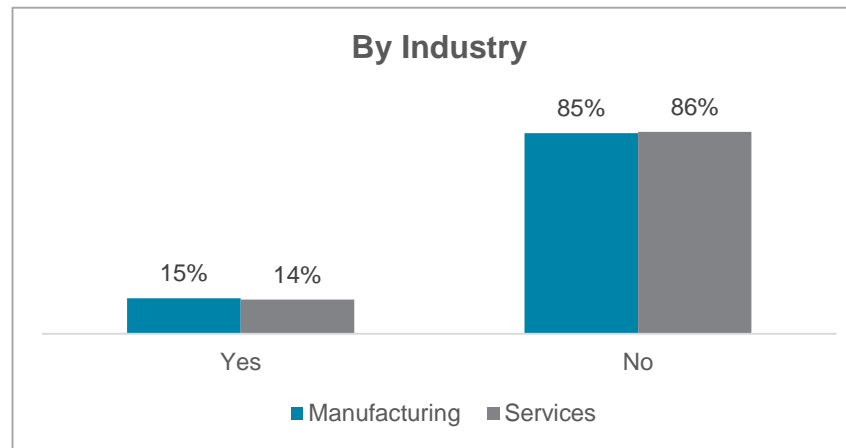
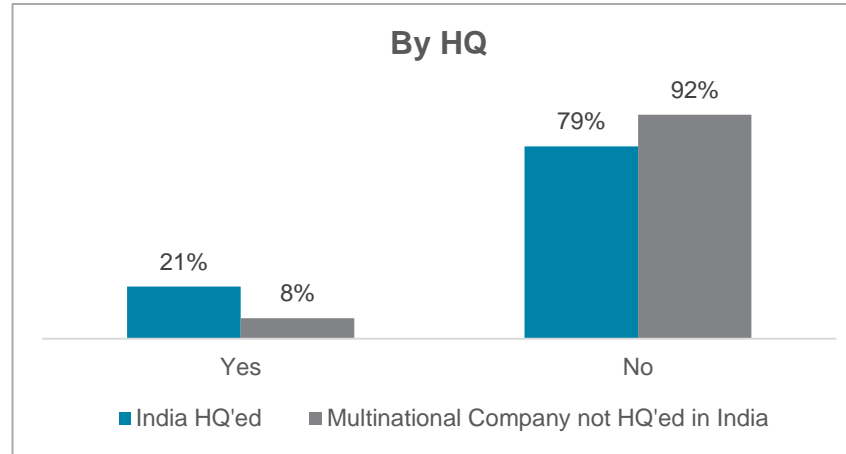
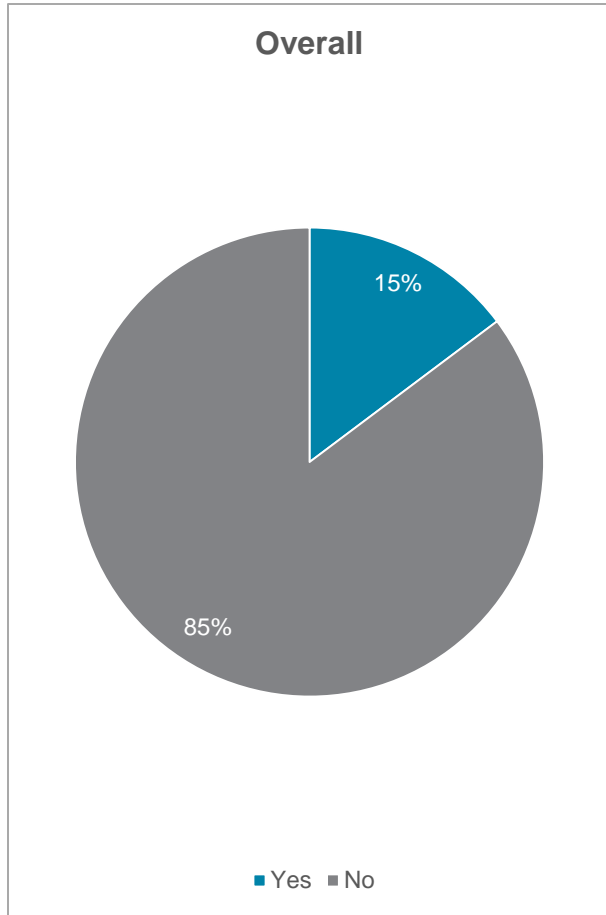


Amongst the 9% of the organizations that are planning to defer bonuses, most organizations are waiting to understand the impact of the pandemic before taking a final decision on payouts.

# India's Inc's Response To COVID-19

*Is India Inc. preparing to rationalize costs with a recession scenario looming in the horizon?*

Aon asked India Inc - "Do you plan to revise bonus payouts for the year 2019-20?"



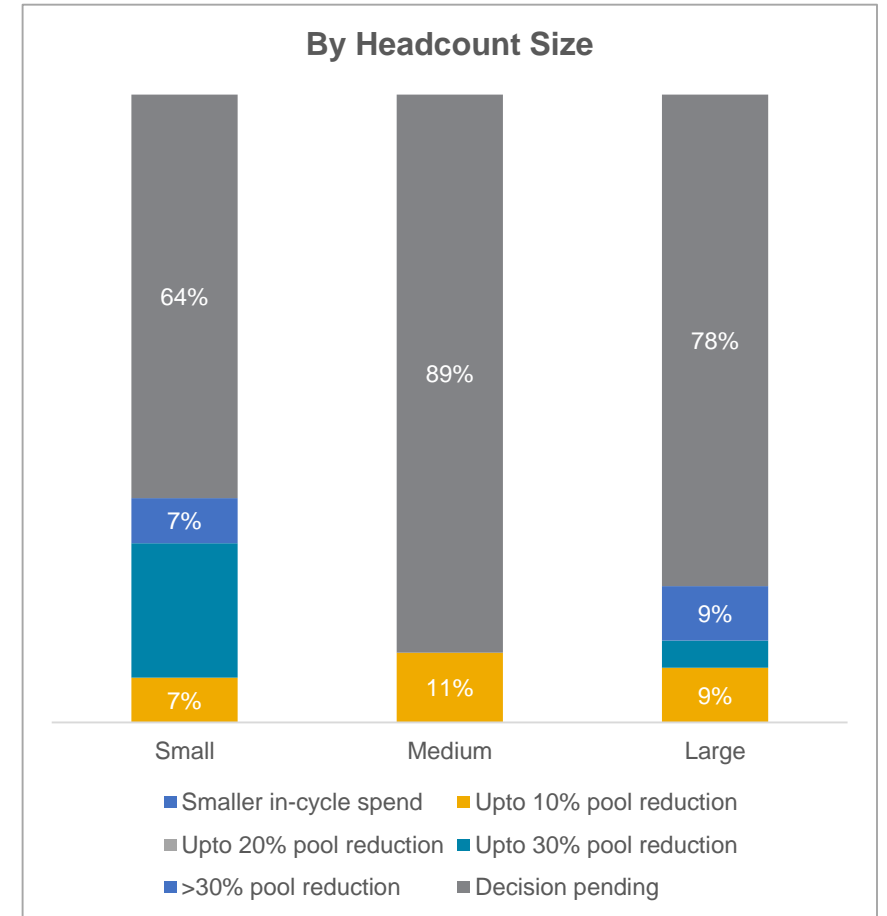
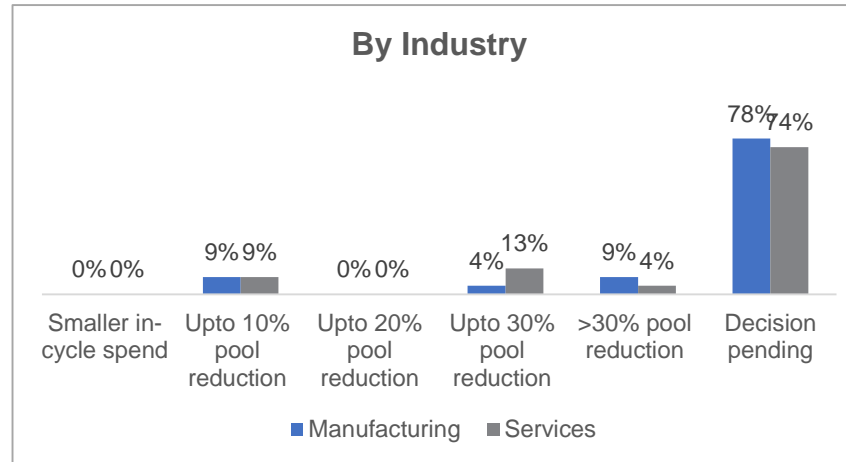
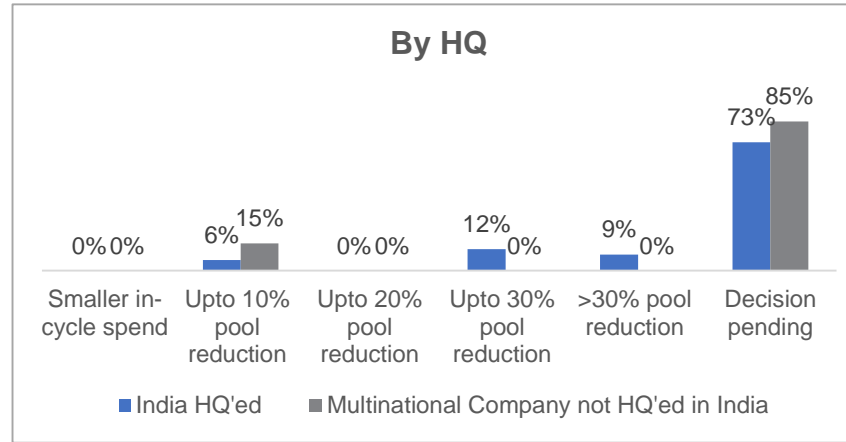
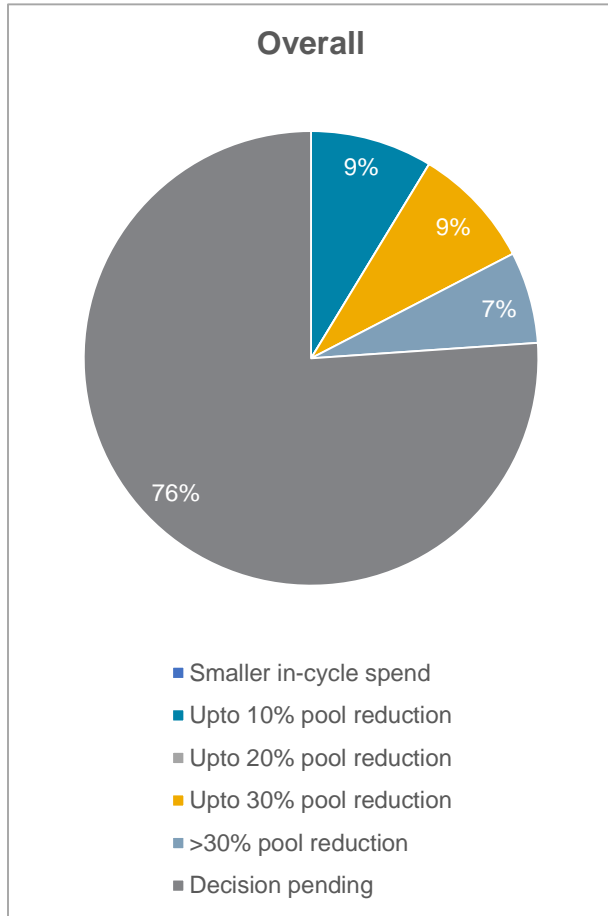
Large majority of organizations across sectors do not plan to revise the bonus pool with MNCs and large firms taking the lead on this decision



# India's Inc's Response To COVID-19

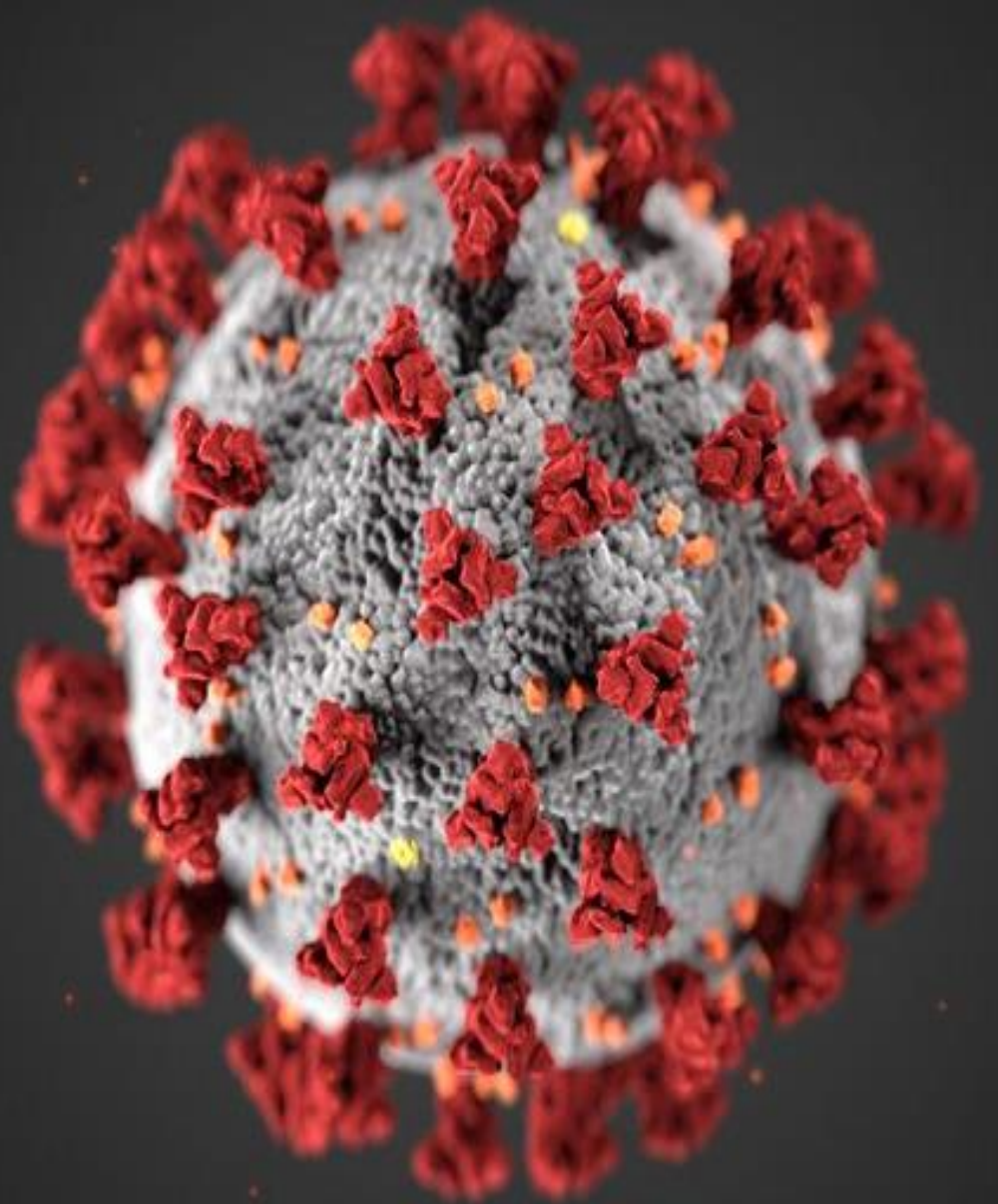
*Is India Inc. preparing to rationalize costs with a recession scenario looming in the horizon?*

Aon asked India Inc - "Do you plan to revise bonus payouts for the year 2019-20?"



From the 15% of the organizations that are planning to revise bonus pools, majority will finalize the extent of revision once the economic impact of the pandemic is gauged.

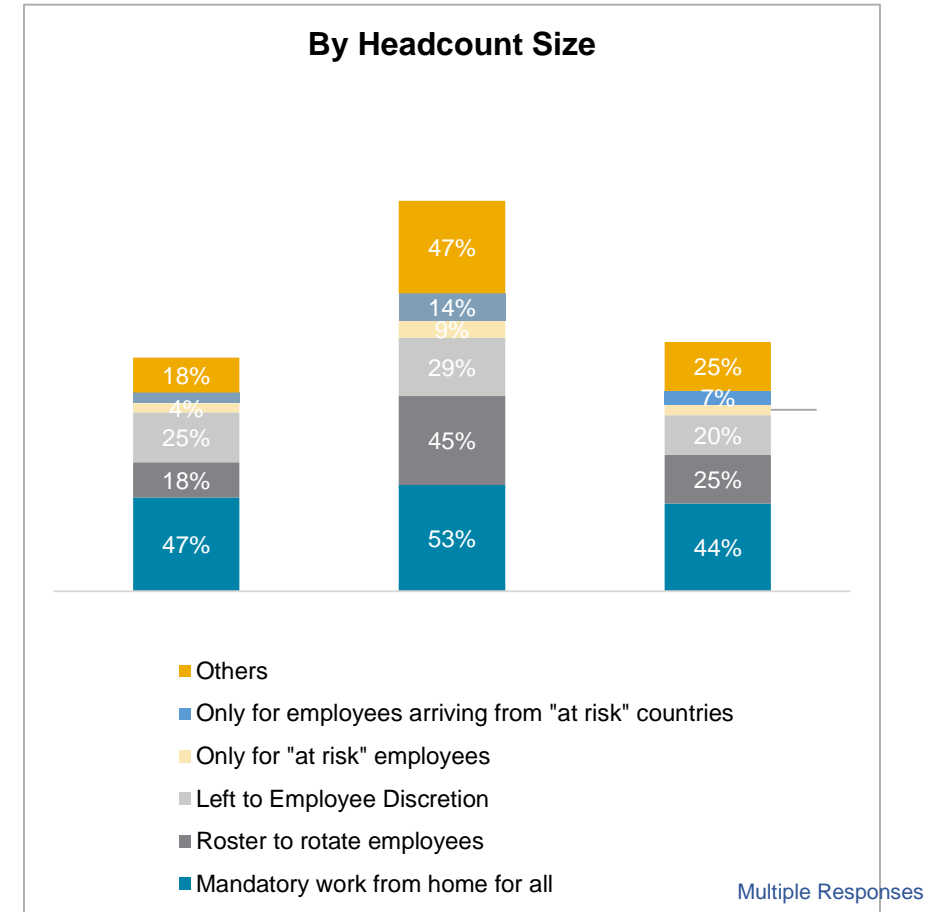
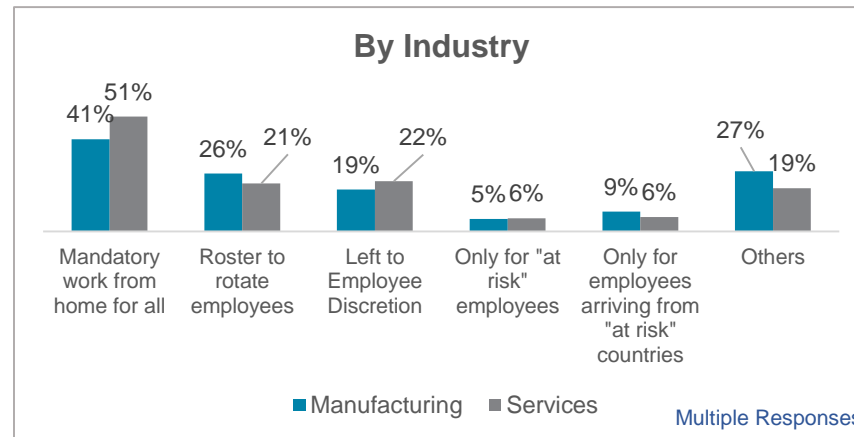
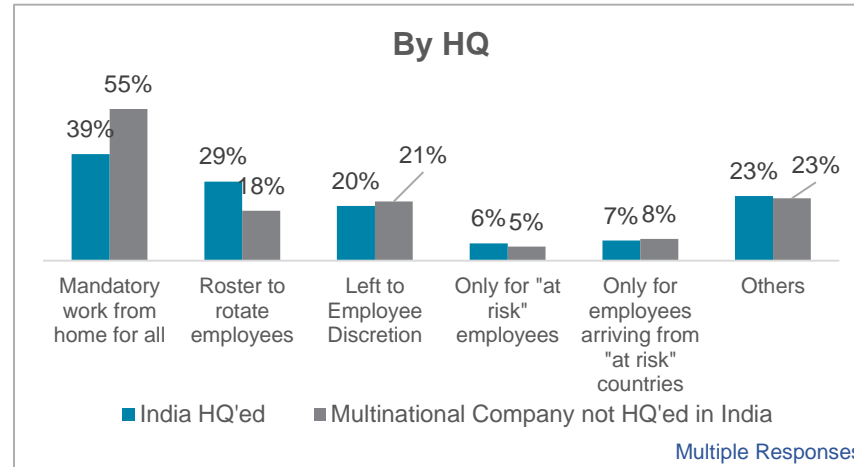
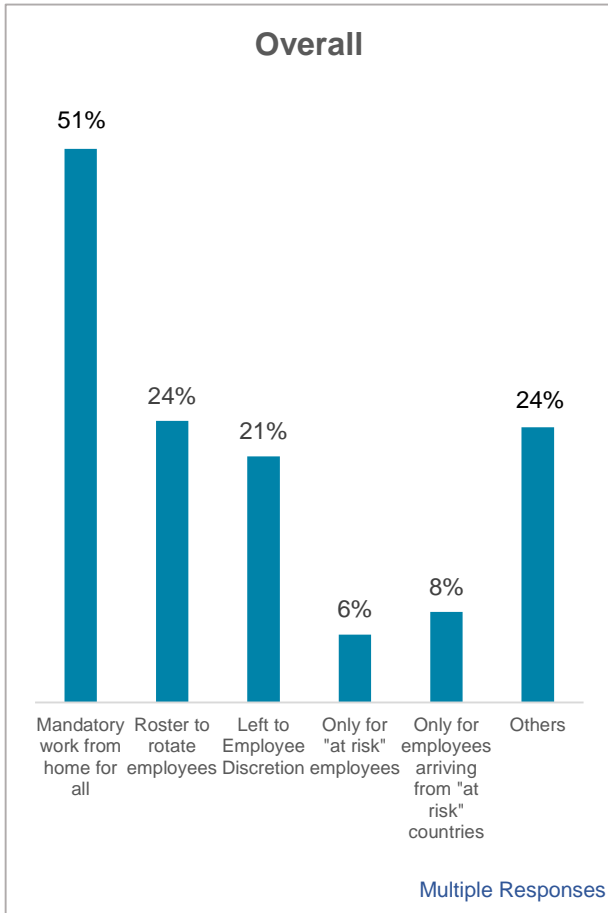
***India Inc.'s Response To Business  
Continuity Measures***



# India's Inc's Response To COVID-19

*Is India Inc. proactively responding to the need of employee safety while ensuring BCP?*

Aon asked India Inc - "How are you implementing work from home measures to increase social distancing while ensuring BCP?"



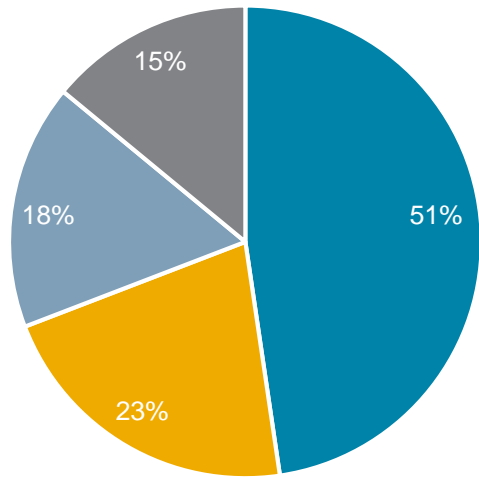
Less than half the organizations had mandated work from home for their employees, rest of the organizations were trying other measures such as asking only employees who had recently travelled abroad to work from home, maintaining skeletal support staff on premises, leaving the decision to manager's discretion.

# India's Inc's Response To COVID-19

## Is India Inc. equipped to handle remote working during BCP?

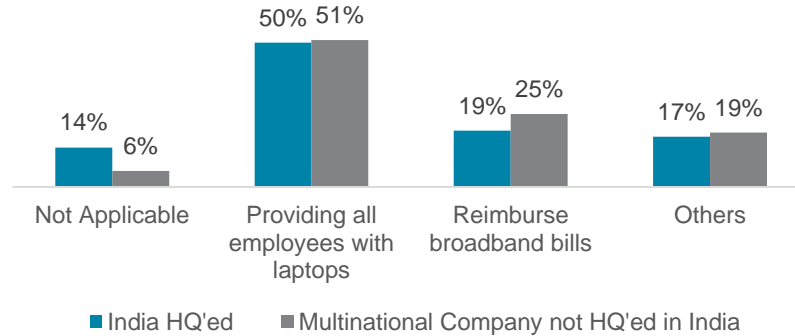
Aon asked India Inc - "What provisions have been made to enable employees to work from home?"

Overall

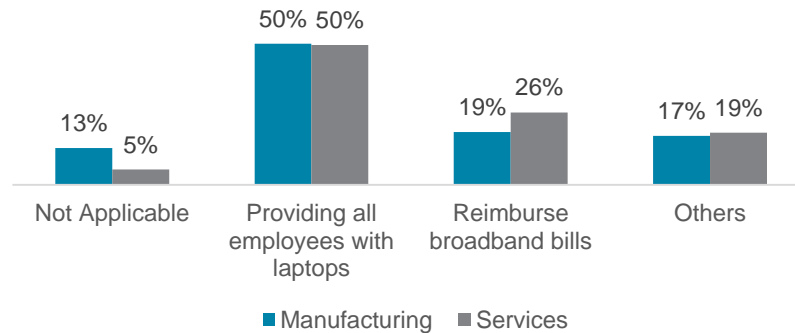


- Laptops
- Broad Band Reimbursement
- Others
- Not Applicable

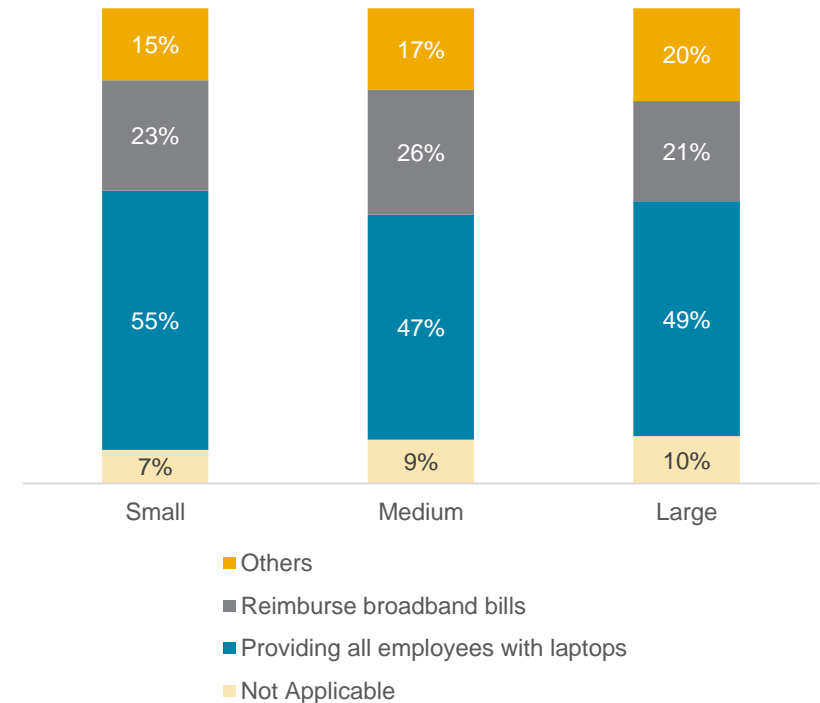
By HQ



By Industry



By Headcount Size

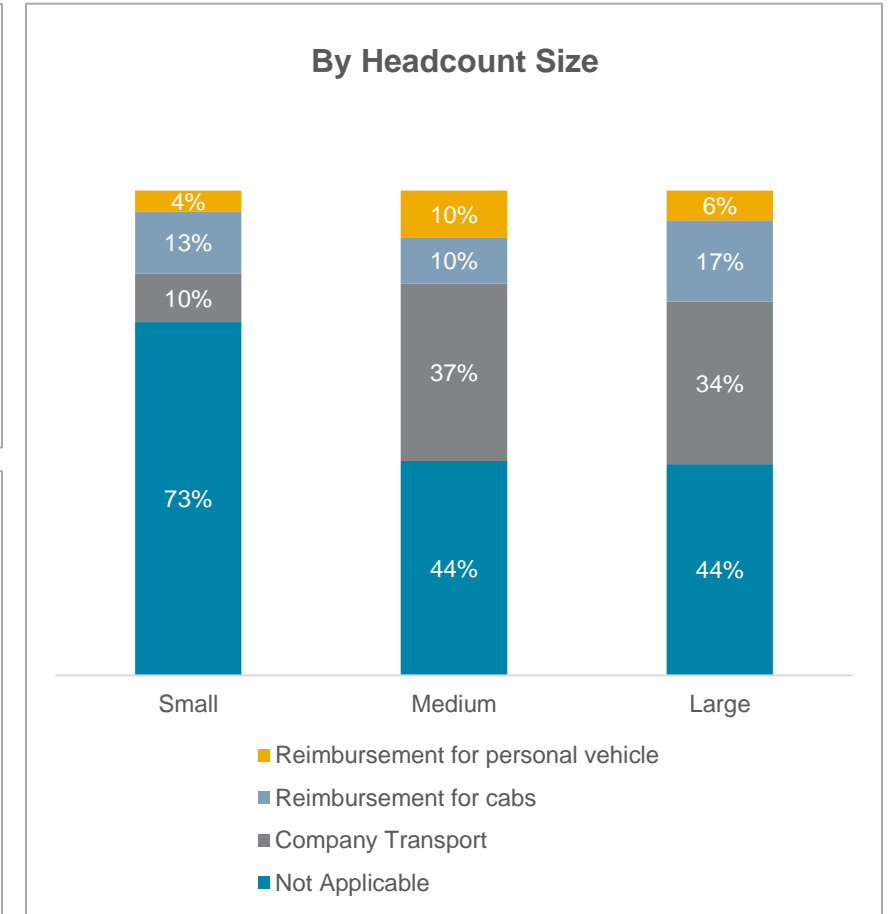
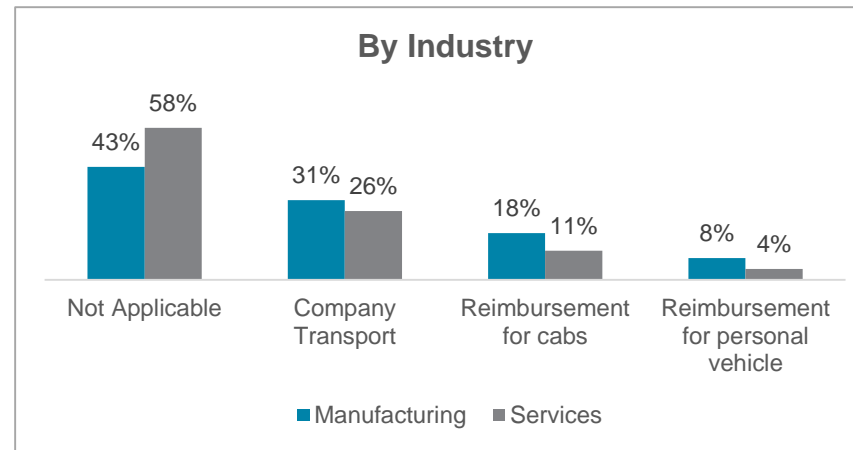
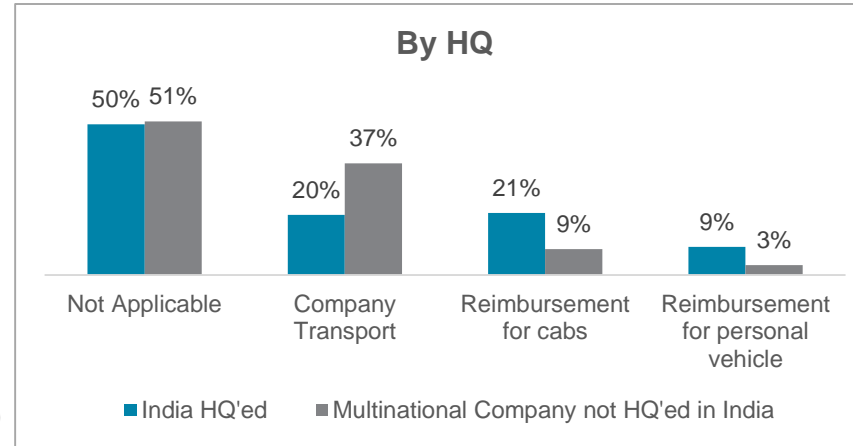
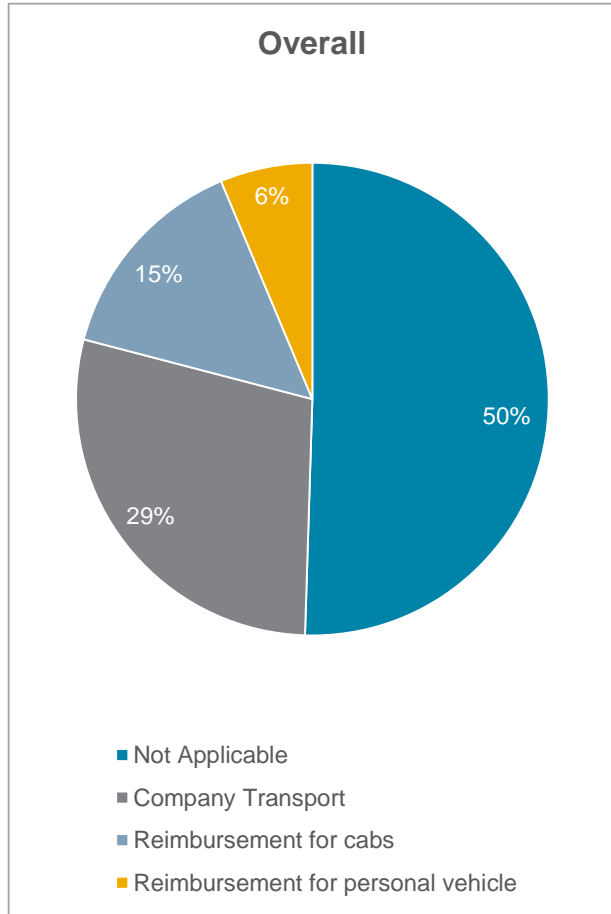


Organizations across sectors have made infrastructural arrangements for remote working along with provision for reimbursement of telecom spends. Other provisions include VPN Connectivity, virtual meeting accounts like Go-To-Meeting/ Zoom, enhanced IT helpline support, increase in mobile data allowances, reimbursement of computer peripherals such as keyboard, mouse, headsets, etc.

# India's Inc's Response To COVID-19

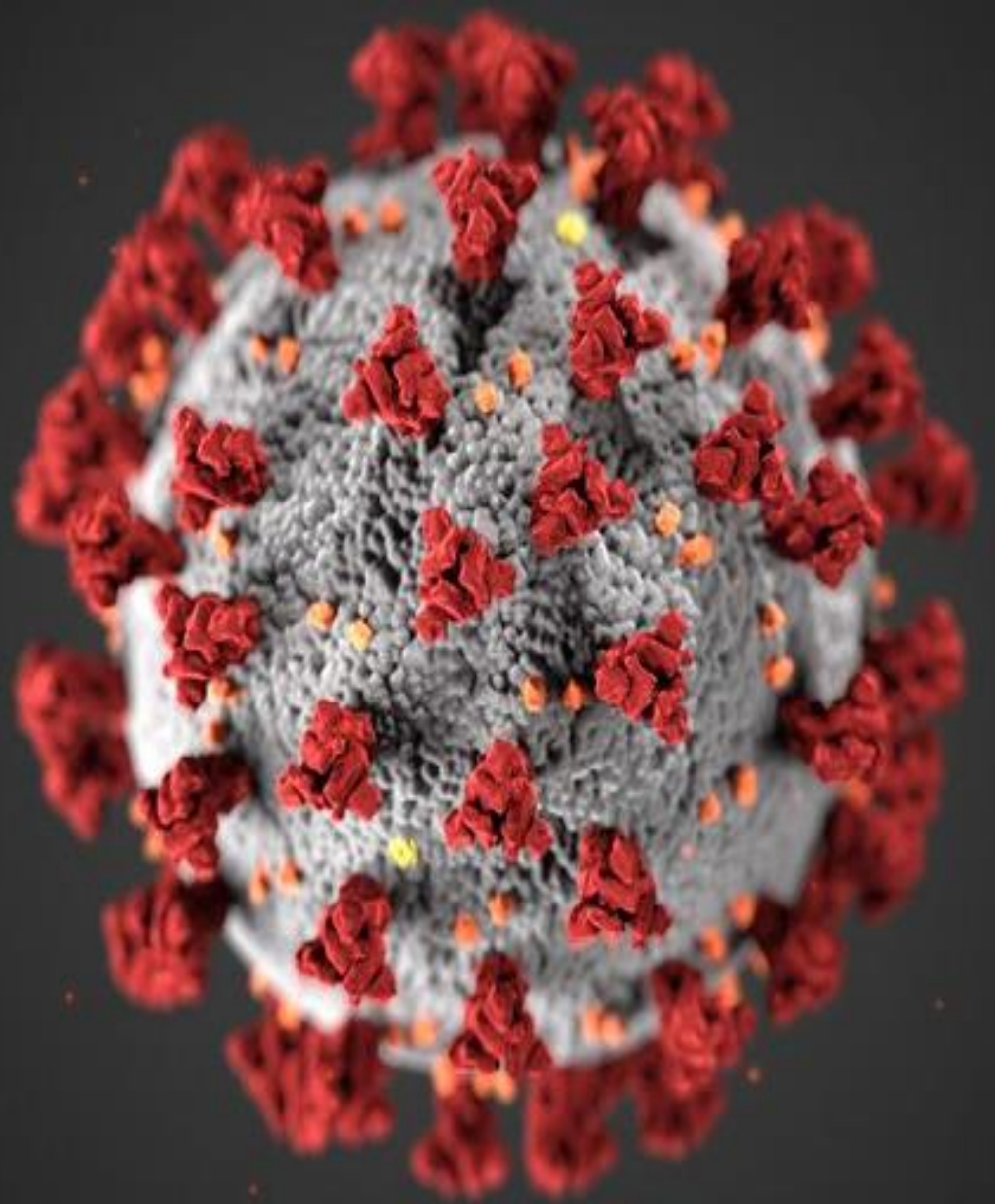
*Is India Inc. proactively responding to the need of employee safety while ensuring BCP?*

Aon asked India Inc - "What transport assistance is being provided to employees coming to office?"



**50% of organizations have made travel arrangements ranging from company transport to reimbursement for public transport/ personal vehicles for employees who were required to work from office.**

***India Inc.'s Response To Employee  
Health And Welfare Measures***

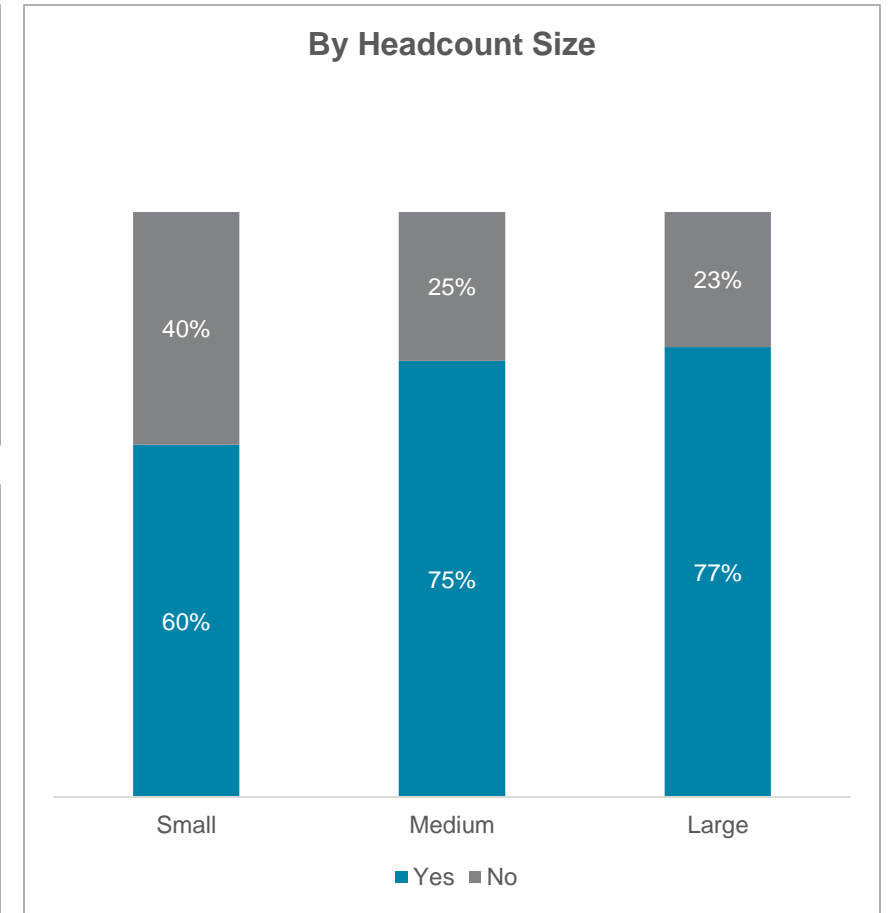
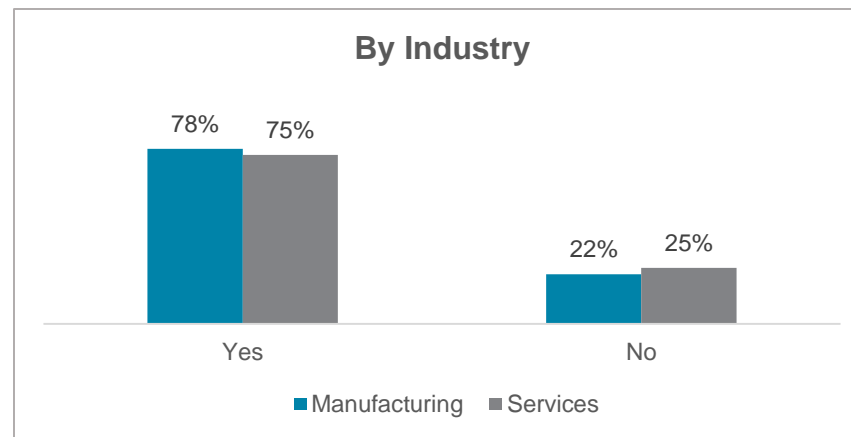
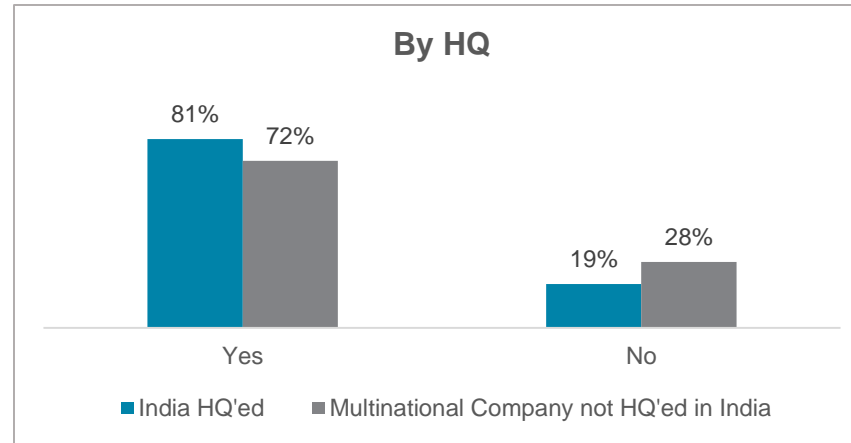
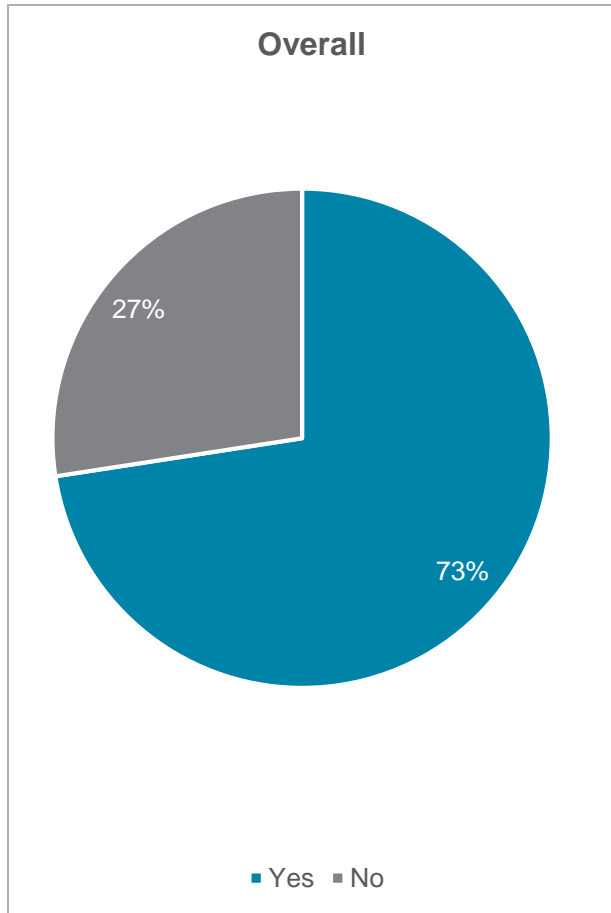




# India's Inc's Response To COVID-19

*Is India Inc. proactively responding to the need of employee safety and risk mitigation?*

Aon asked India Inc - "Do you have health screening safeguards put in place for all employees who decide to come into office?"

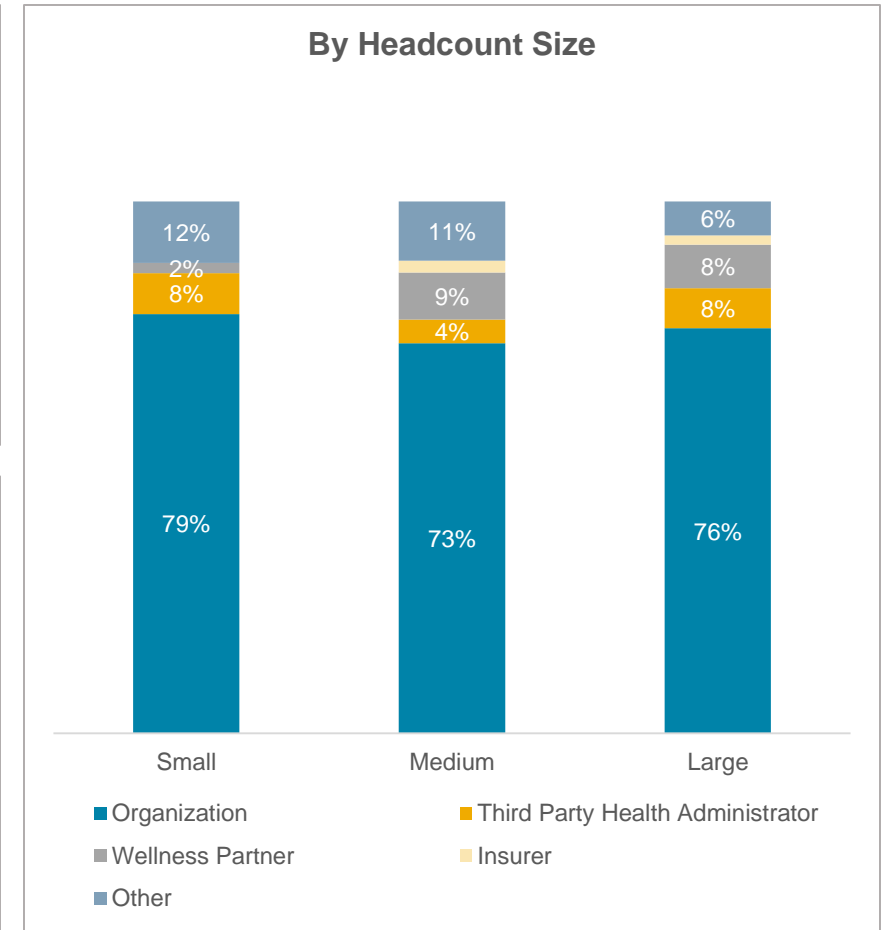
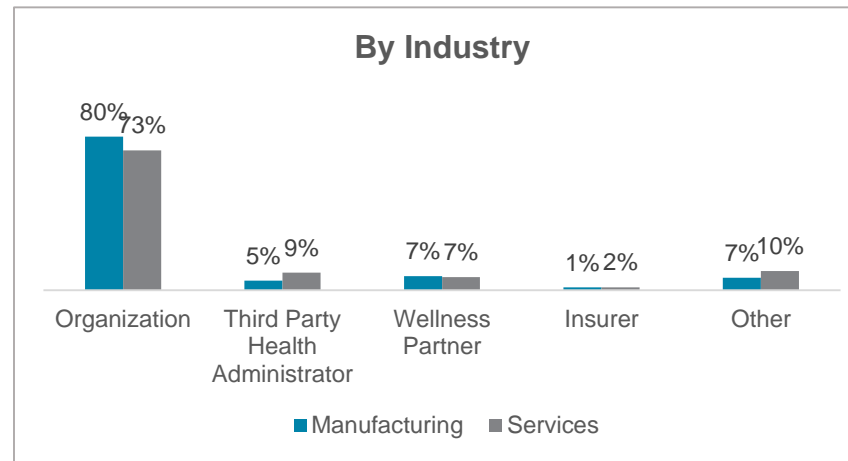
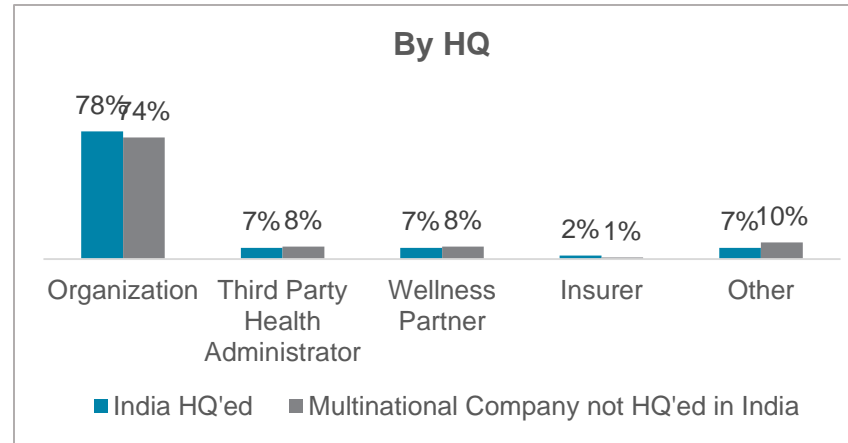
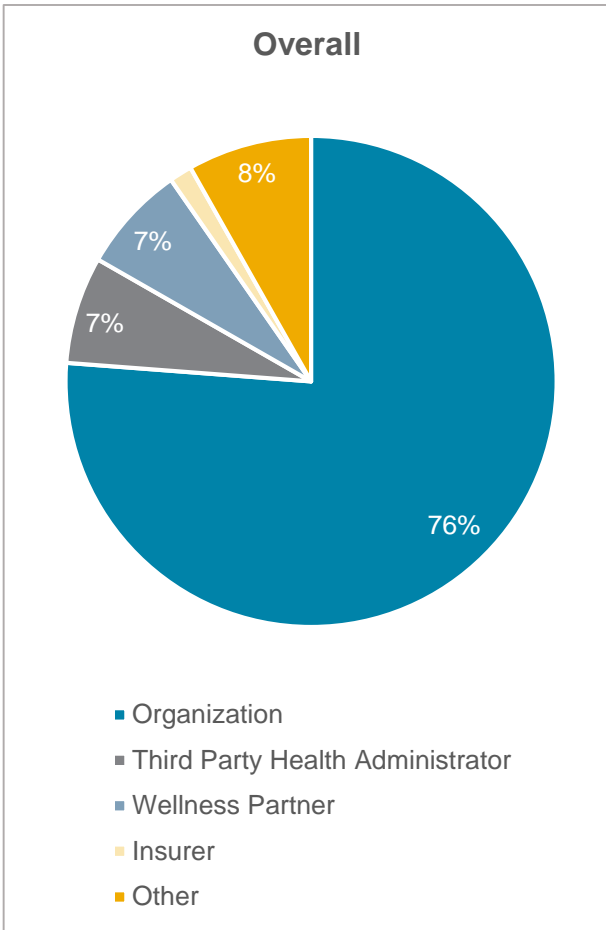


Most organizations have incorporated measures to screen their employees to detect potential infection; though smaller size organizations seem less prepared than rest of the organizations in ensuring employee screening

# India's Inc's Response To COVID-19

*Is India Inc. proactively responding to the need of employee safety and risk mitigation?*

Aon asked India Inc - "Who is implementing the health screening safeguards?"



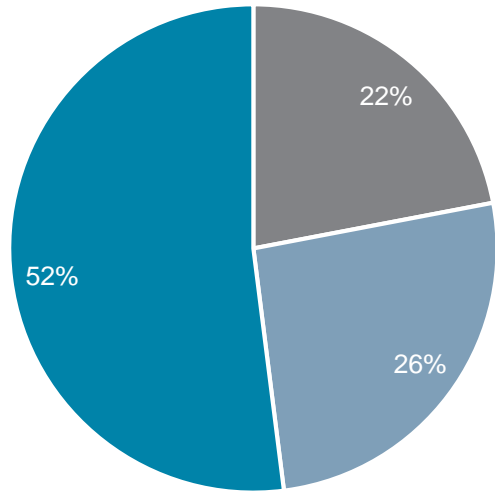
**Most organizations are conducting the health screening themselves; few of the other organizations along with rest of the measures have also employed contract workforce for the screening or their building facilities itself conducts the screening**

# India's Inc's Response To COVID-19

*Is India Inc. proactively responding to the need of employee safety and risk mitigation?*

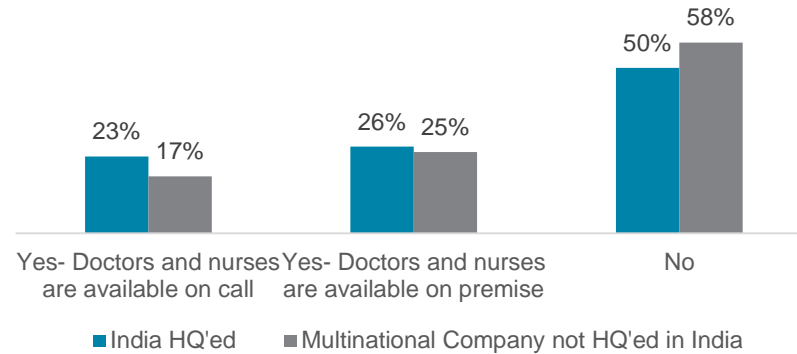
Aon asked India Inc -“Do you have trained physicians and nurses to provide assistance to any suspected COVID-19 cases?”

Overall

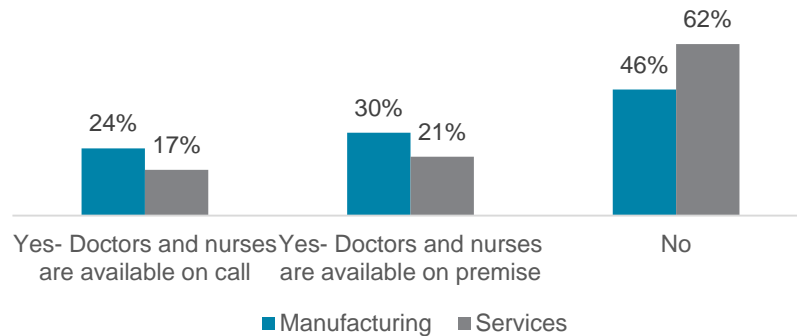


- Yes- Doctors and nurses are available on call
- Yes- Doctors and nurses are available on premise
- No

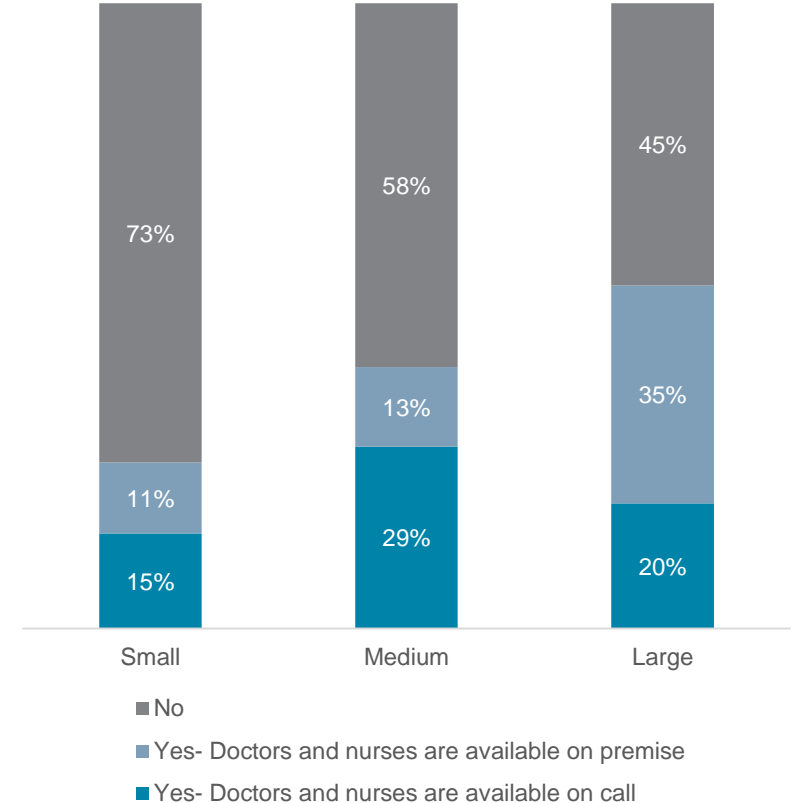
By HQ



By Industry



By Headcount Size

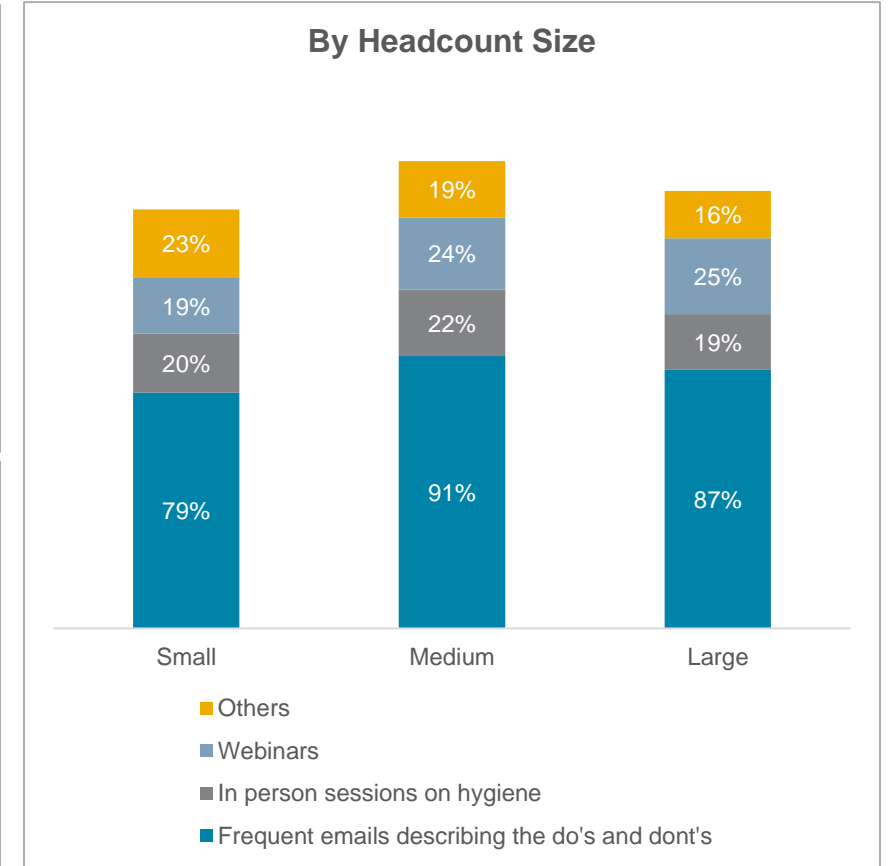
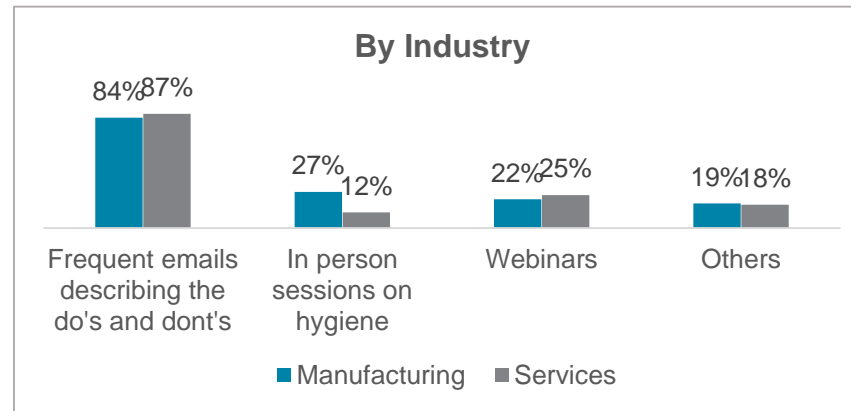
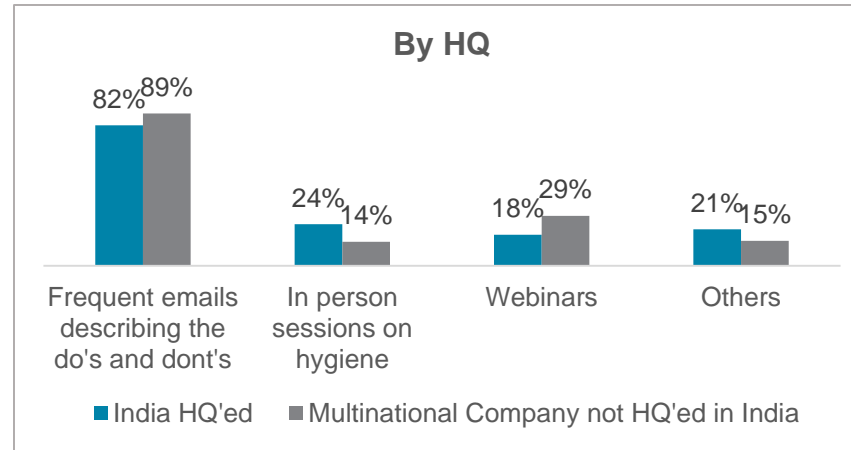
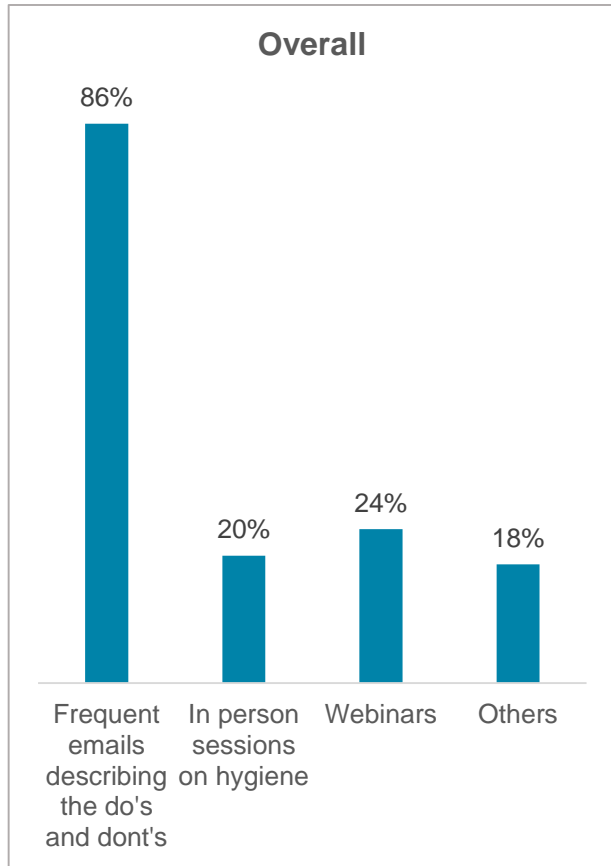


Most organizations irrespective of the industry/ HQ segmentation are ill equipped to provide support to employees for health concerns; despite the scale of the pandemic, organizations have not been proactive in at least having health experts on call

# India's Inc's Response To COVID-19

*Is India Inc. proactively responding to the need of employee safety and risk mitigation?*

Aon asked India Inc - "How are you driving awareness of methods to prevent the spreading of COVID-19 in your organization?"

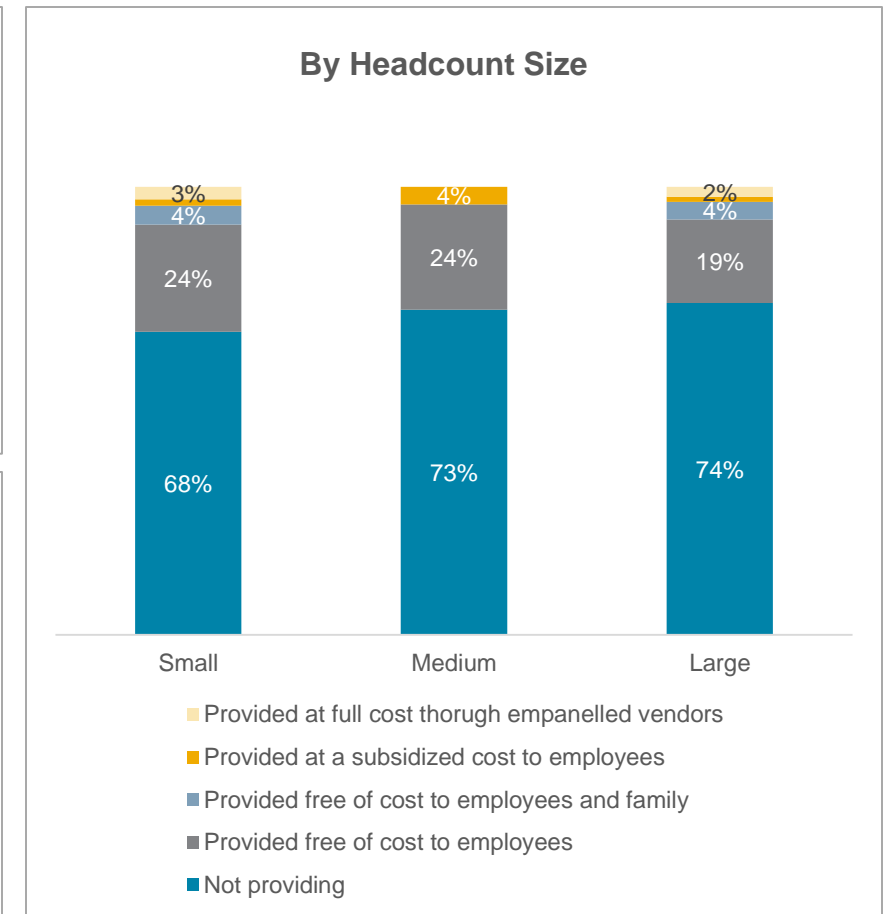
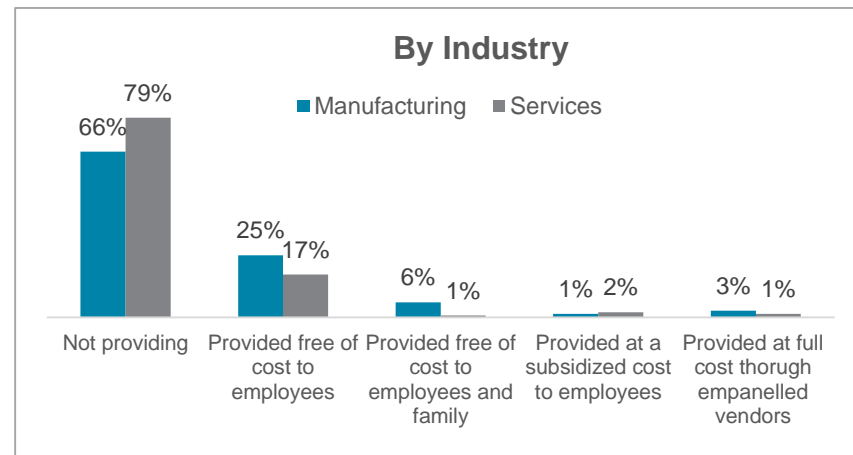
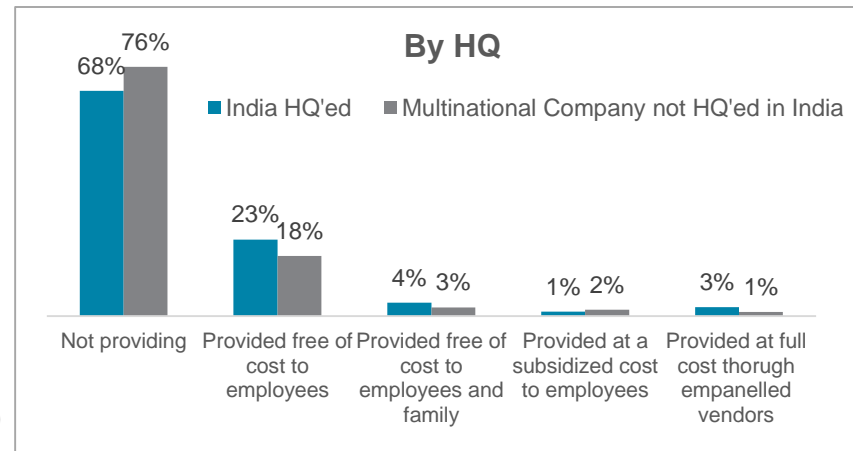
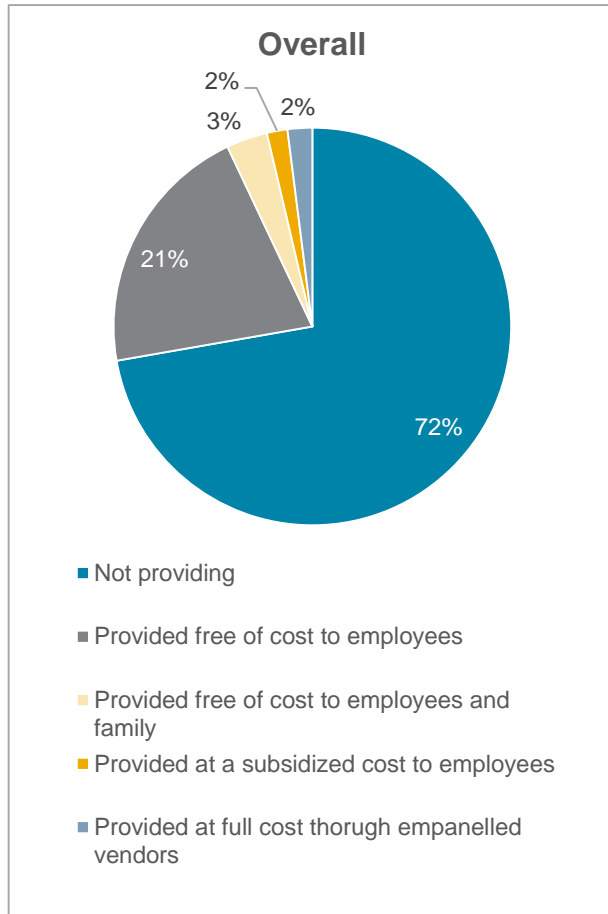


Majority of the organizations are using emails to communicate with their employees; however few organizations have implemented other means of communication like Townhalls/Conferences, dedicated live Micro website containing all details like About, Travel, Self Care Tips, Personal Hygiene etc., employee helpline to answer all employee queries.

# India's Inc's Response To COVID-19

*Is India Inc. proactively responding to the need of employee safety and risk mitigation?*

Aon asked India Inc - "Are health supplies being provided to employees?"

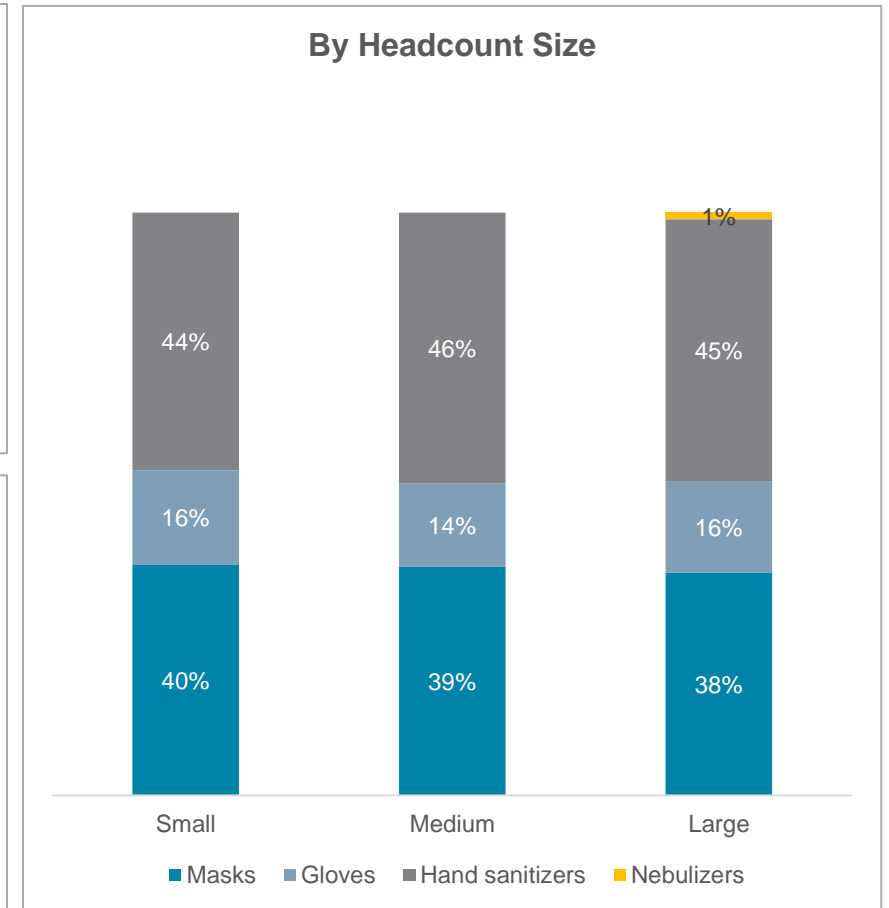
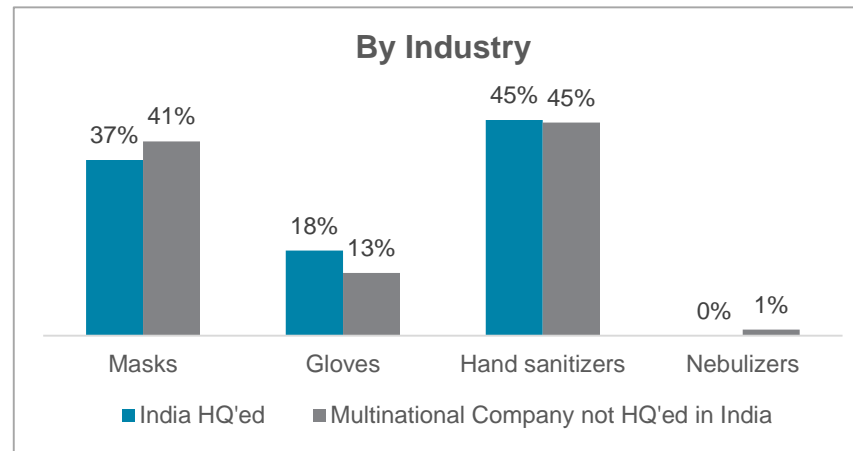
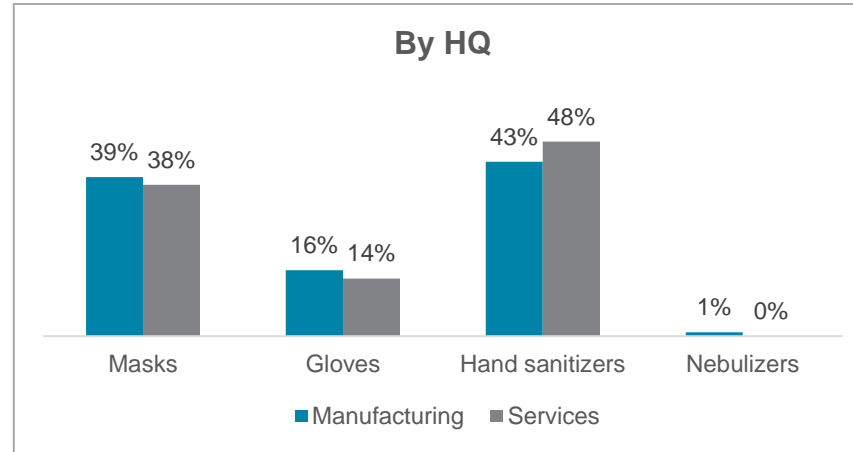
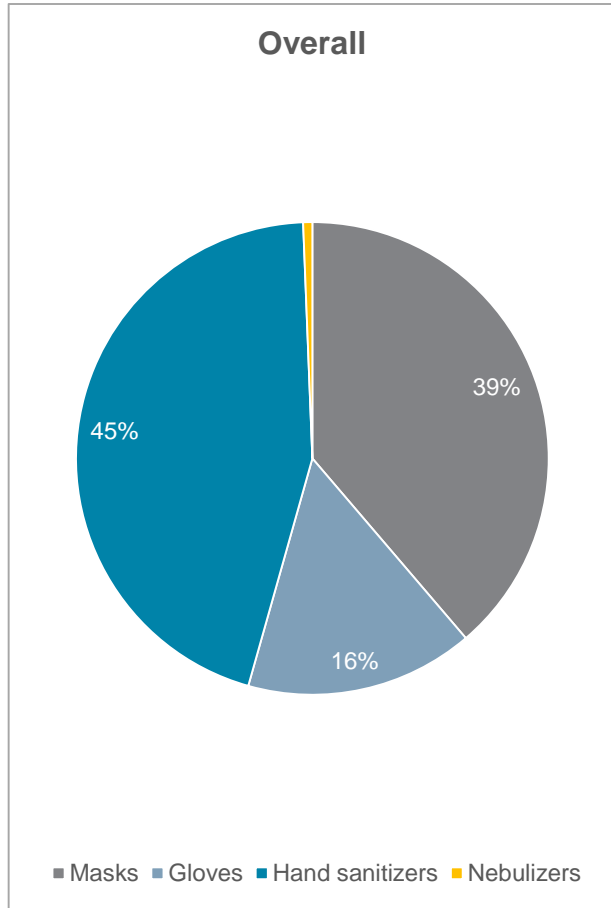


**Very few organizations irrespective of size have made provisions for health supplies to employees. Manufacturing sector has been more conscious of employee safety in comparison to service sector organizations.**

# India's Inc's Response To COVID-19

*Is India Inc. proactively responding to the need of employee safety and risk mitigation?*

Aon asked India Inc - "What kind of health supplies are being provided to employees?"



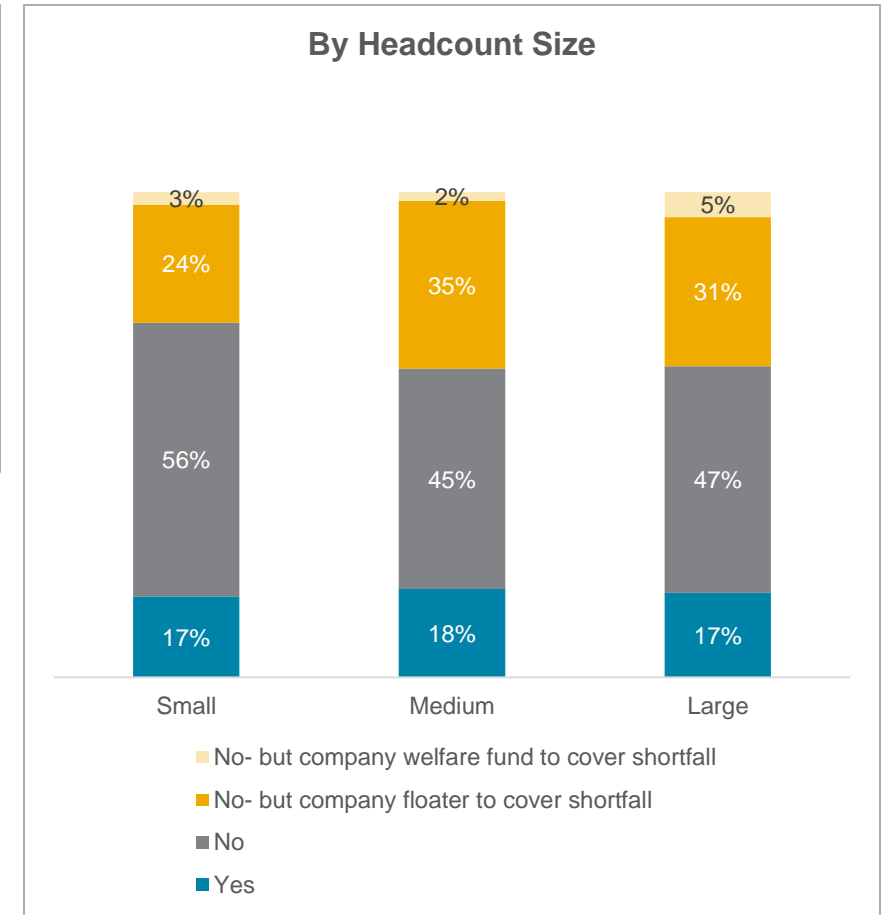
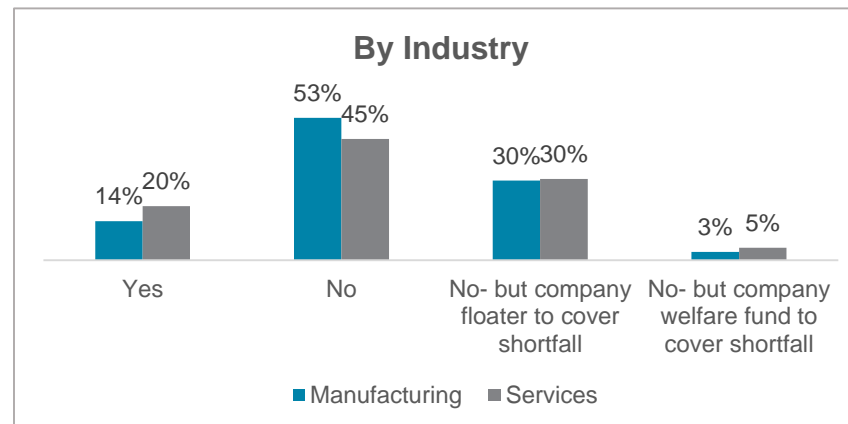
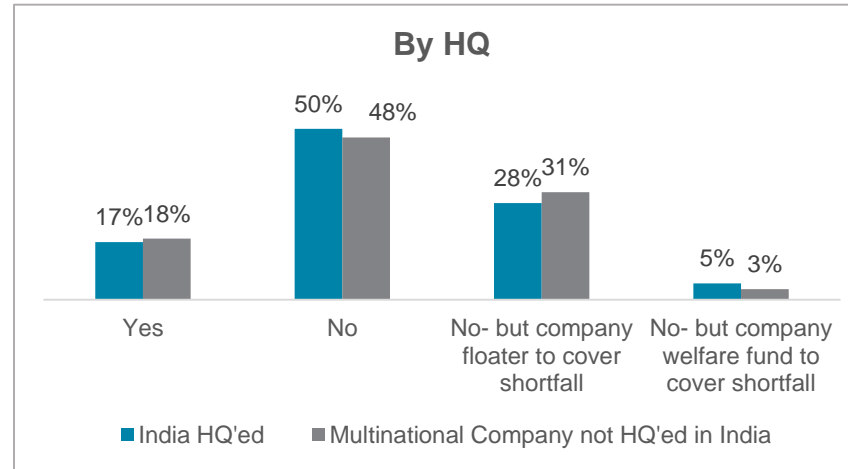
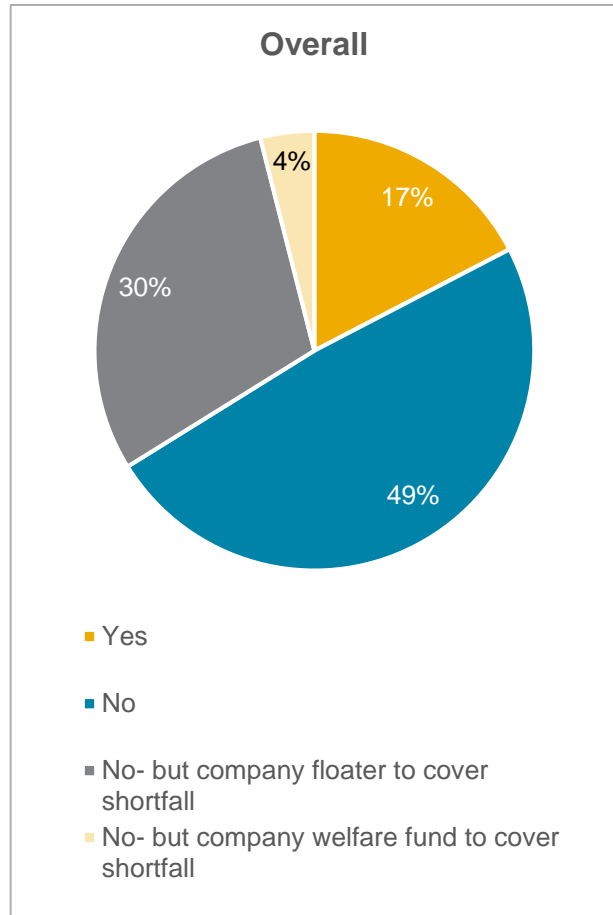
Of the 28% organizations that are providing health supplies, necessities such as hand sanitizers and masks have been prioritized.



# India's Inc's Response To COVID-19

## Is India Inc. proactively responding to the need of employee welfare?

Aon asked India Inc - "Have you negotiated with your health insurer to increase the insurance coverage for COVID-19 affected employees?"



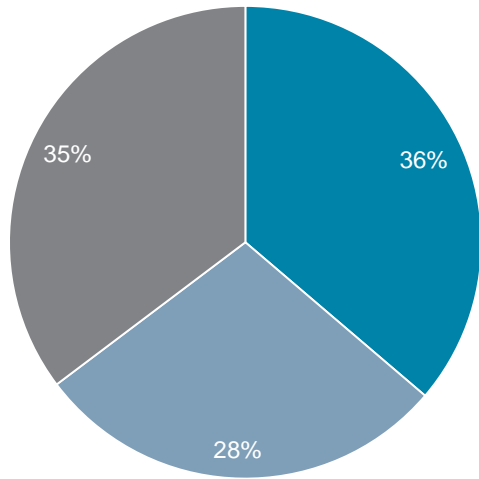
Very few organizations irrespective of size and sector have increased their insurance coverage for COVID-19 affected employees

# India's Inc's Response To COVID-19

*Is India Inc. proactively responding to the need of employee welfare?*

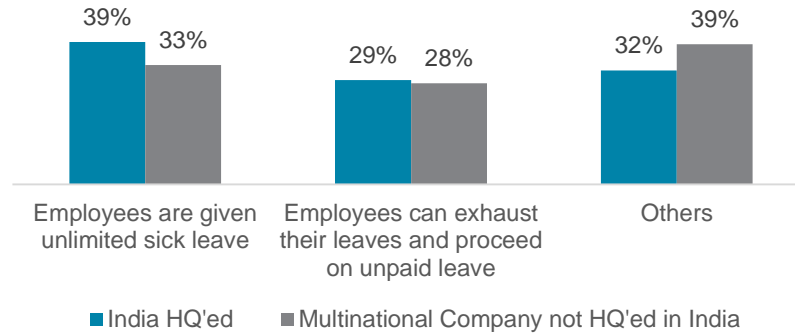
Aon asked India Inc - "What actions are you taking on leaves for employees affected by COVID-19?"

Overall

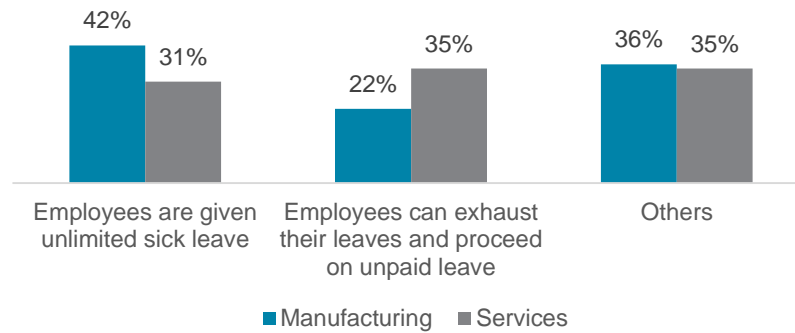


- Employees are given unlimited sick leave
- Employees can exhaust their leaves and proceed on unpaid leave
- Others

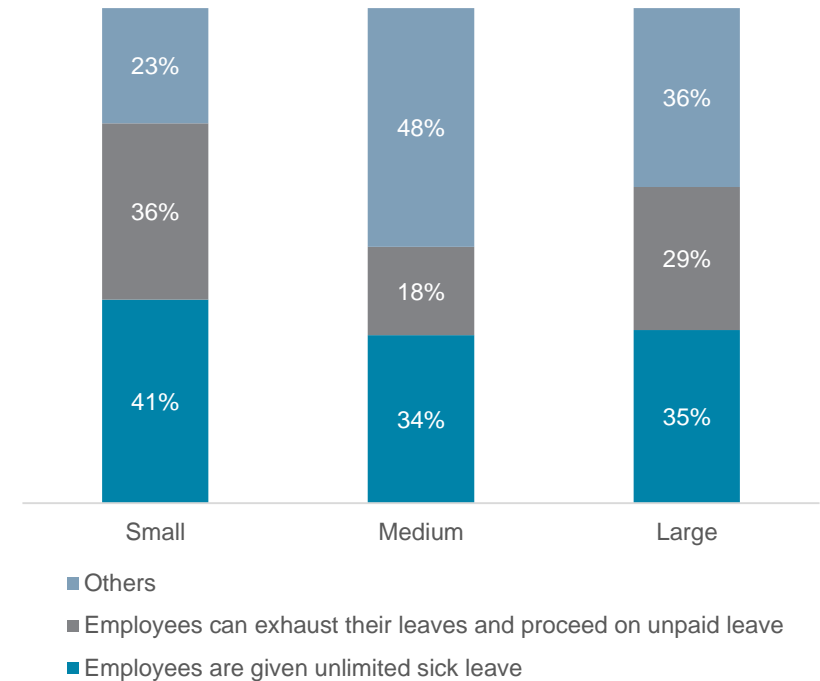
By HQ



By Industry



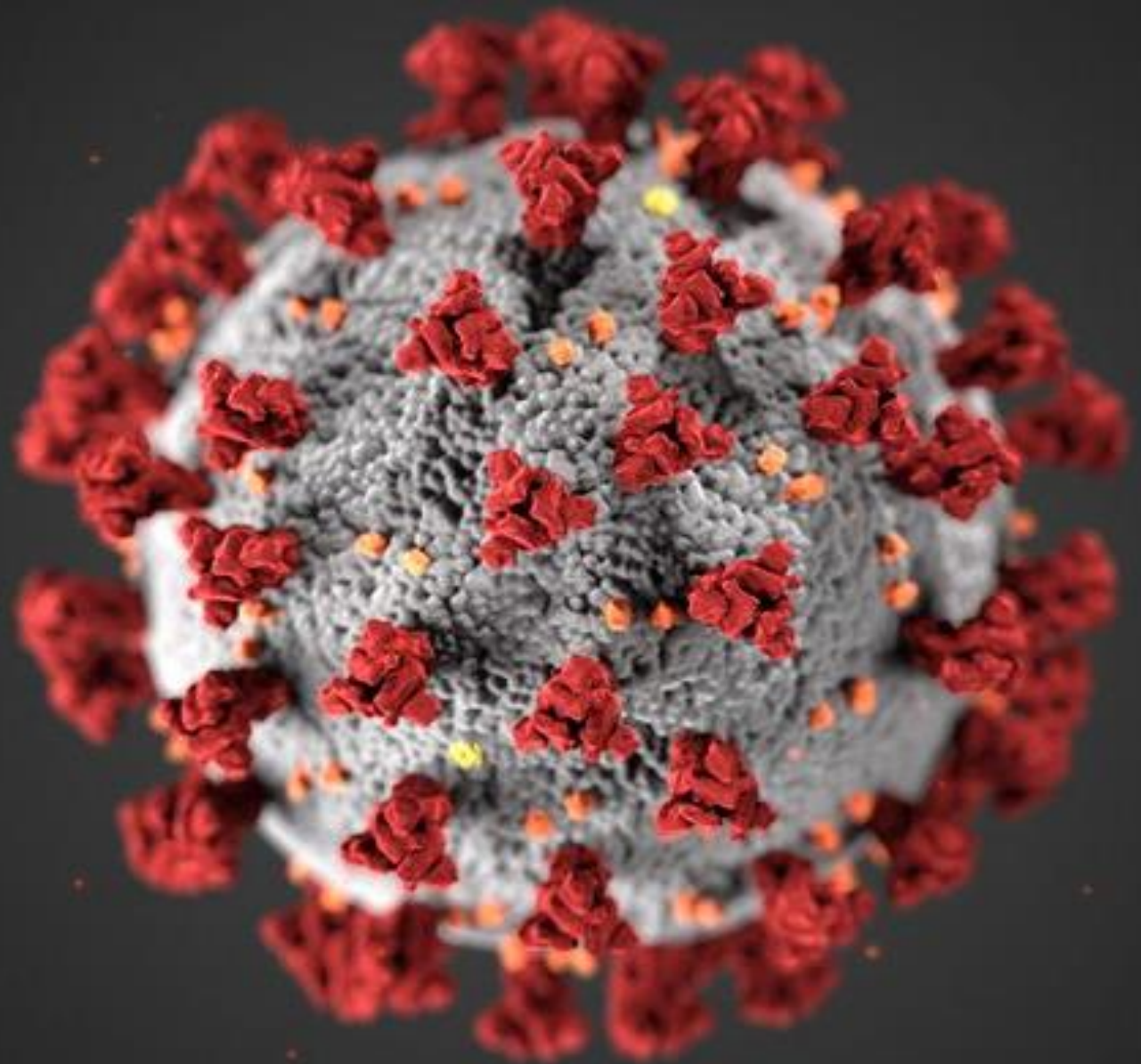
By Headcount Size



Only 36% of organizations were providing unlimited sick leaves to affected employees; other options under consideration were to sanction 7-28 days' additional paid leaves or adjust leave deficit from next year's balance.

However, the government has now mandated organizations to provide 28 days of paid leave to employees in the event of COVID infection.

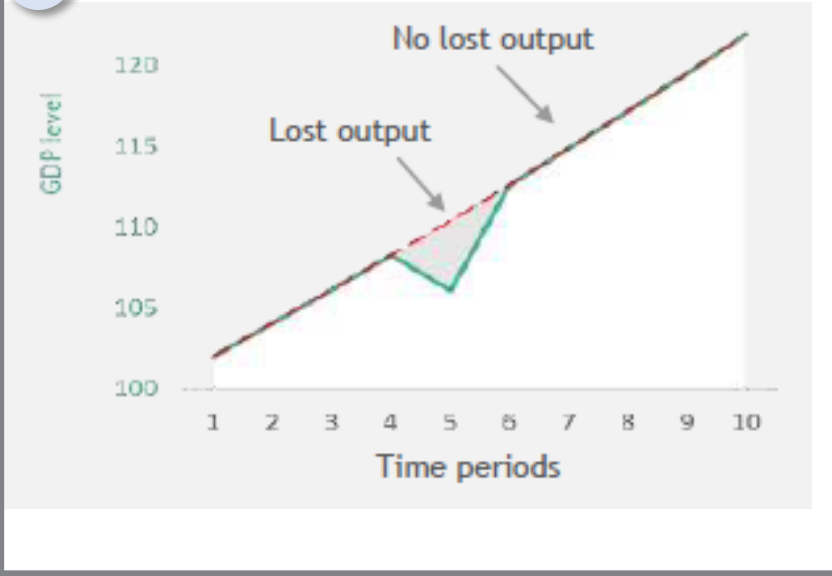
***How Should  
Organizations  
Respond?***



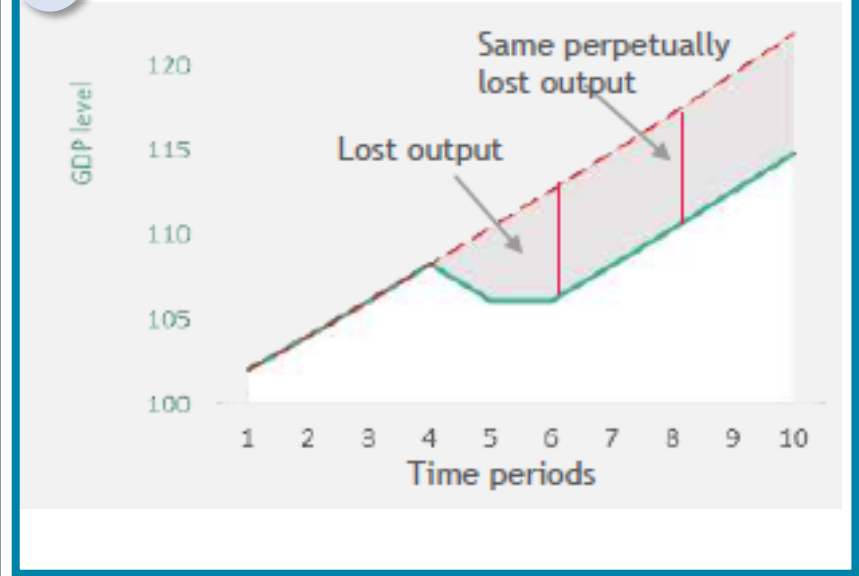
# What is the Likely Recovery Path?

## Three Macro-Economic Impact Scenarios Emerging Under COVID-19

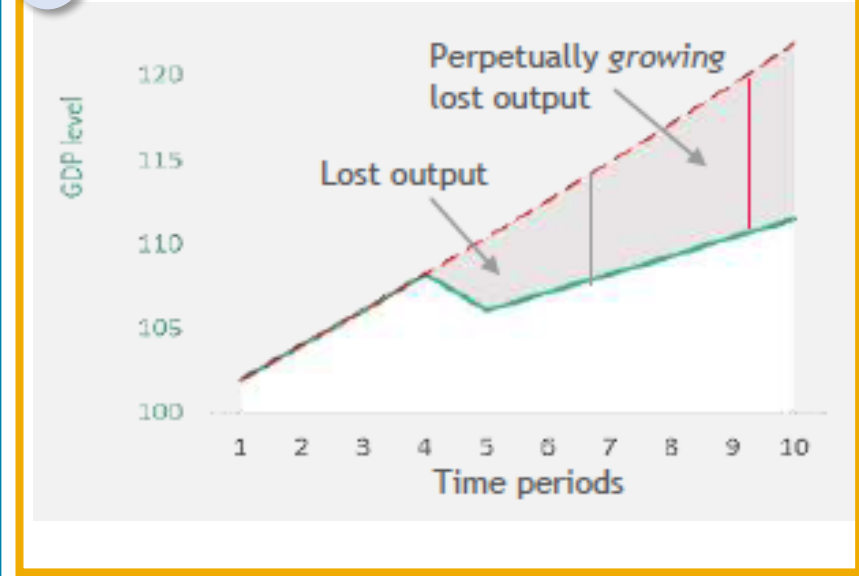
1



2



3



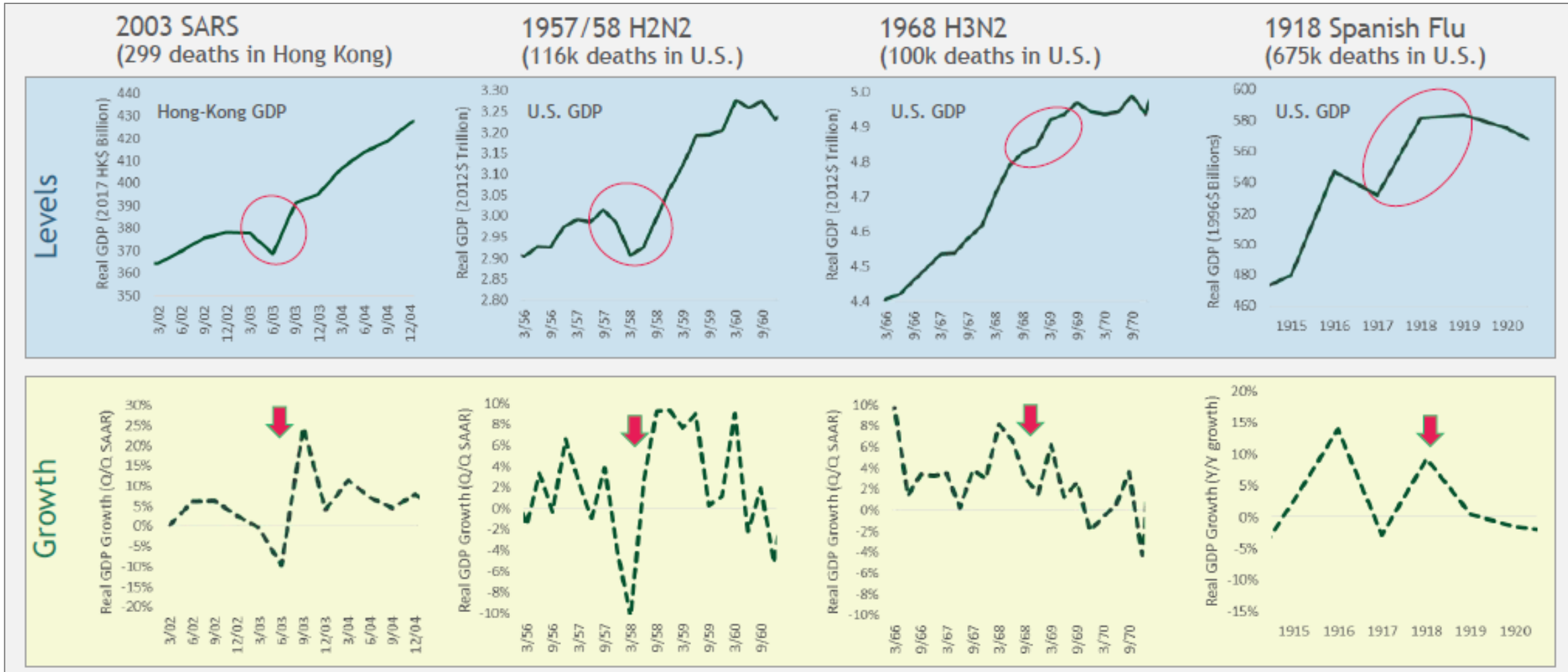
Where the pandemic seems to be heading currently

Likely scenario if the pandemic continues to grow exponentially

Least likely but possible should we fail to contain the pandemic.

# What is the Likely Recovery Path?

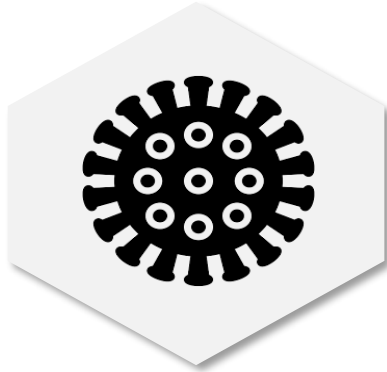
Interestingly, Every epidemic in past has seen a V-shape recession recovery



# Chain of Reaction

## How Organizations React in Times of Distress

### Chain Of Reaction



Global crisis such as coronavirus, great recession looming large



Economic slowdown, reduced demand, induced recession



Organizations reacting by laying off employees to contain expense cost

### Is Headcount Reduction The Only Way To Deal With Recession ?



#### Erosion in brand value and shareholder's confidence

Layoffs put a lingering burden on organization both financially and emotionally. Aon analysis highlights that organizations that do large scale structural layoff have **lower employee perception score**



#### Higher than average top performer attrition

Layoffs dampen the spirit and morale of overall organization. What's left behind reels in constant fear of uncertainty which makes **star performers to flee at first best opportunity**



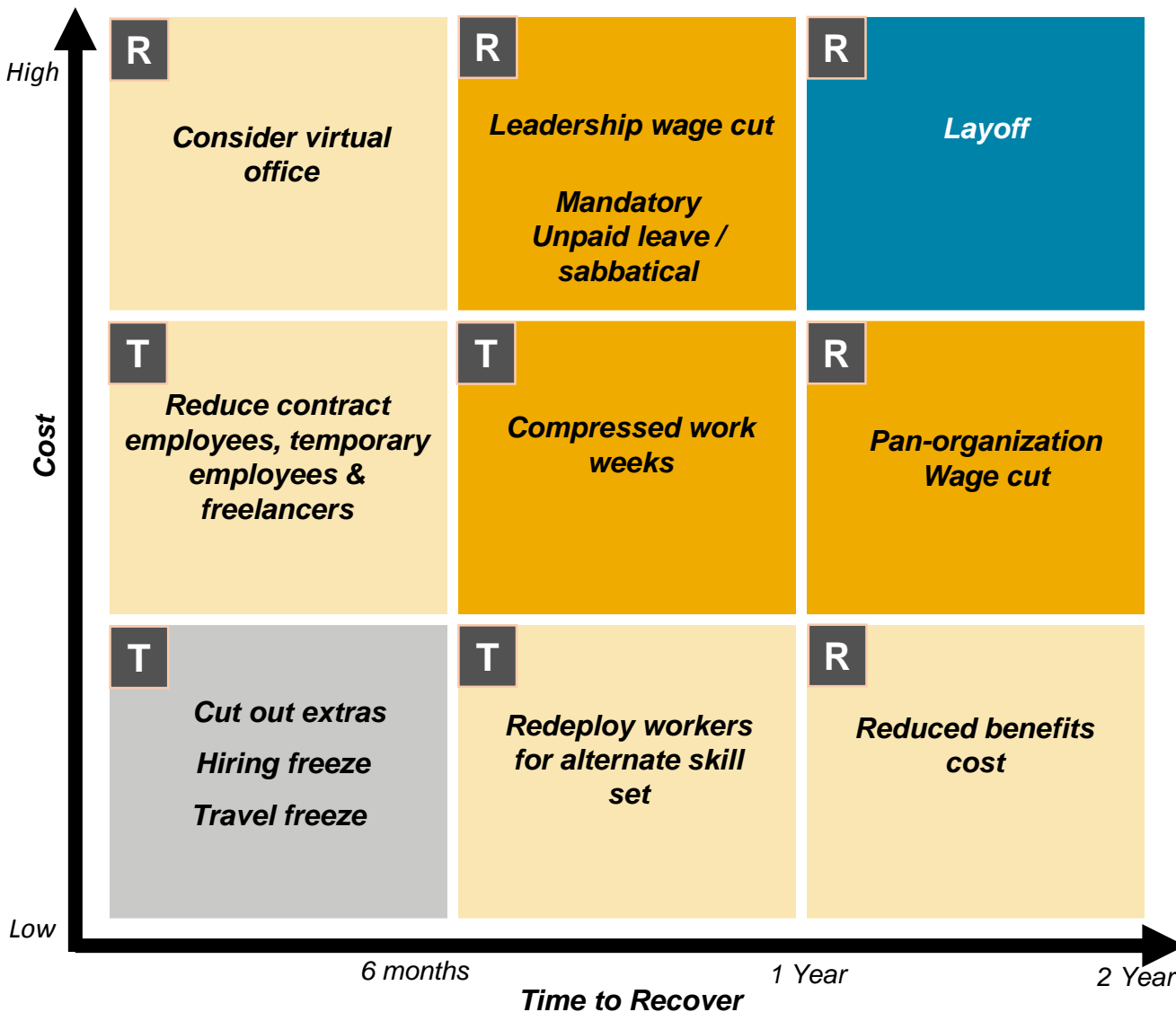
#### Higher future cost to build back muscle

Layoff might help in short term but will result in **double the cost in future in terms of rehiring & training when firm is ramping up.** Organizations should look at shedding fat but not at the cost of muscle.



# Is Headcount Reduction The Only Way To Deal With Recession ?

## Organizations Should Look at Alternate Ways of Dealing with Uncertainty

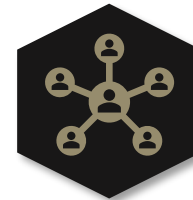


### How Can Organizations Enable Fat Cutting



#### Leadership to keep communication transparent and lead by example

Moves such as pay cut go over better when they start at the top. It can help pad the blow if senior management takes the first blow and a bigger cut than the rest of the company. Offering buyouts for employees with longer tenures can also help soften the blow



#### Community mindset and collaborative culture practices

Bringing in community mindset during decision making ensures greater collaboration and higher morale amongst employees. Leadership should ensure open and transparent communication and display a collaboration. For example, organizations might reduce salaries for their highest paid employees by 10%, mid-range salaried employees by 5%, and everyone else above a certain threshold by half of that.



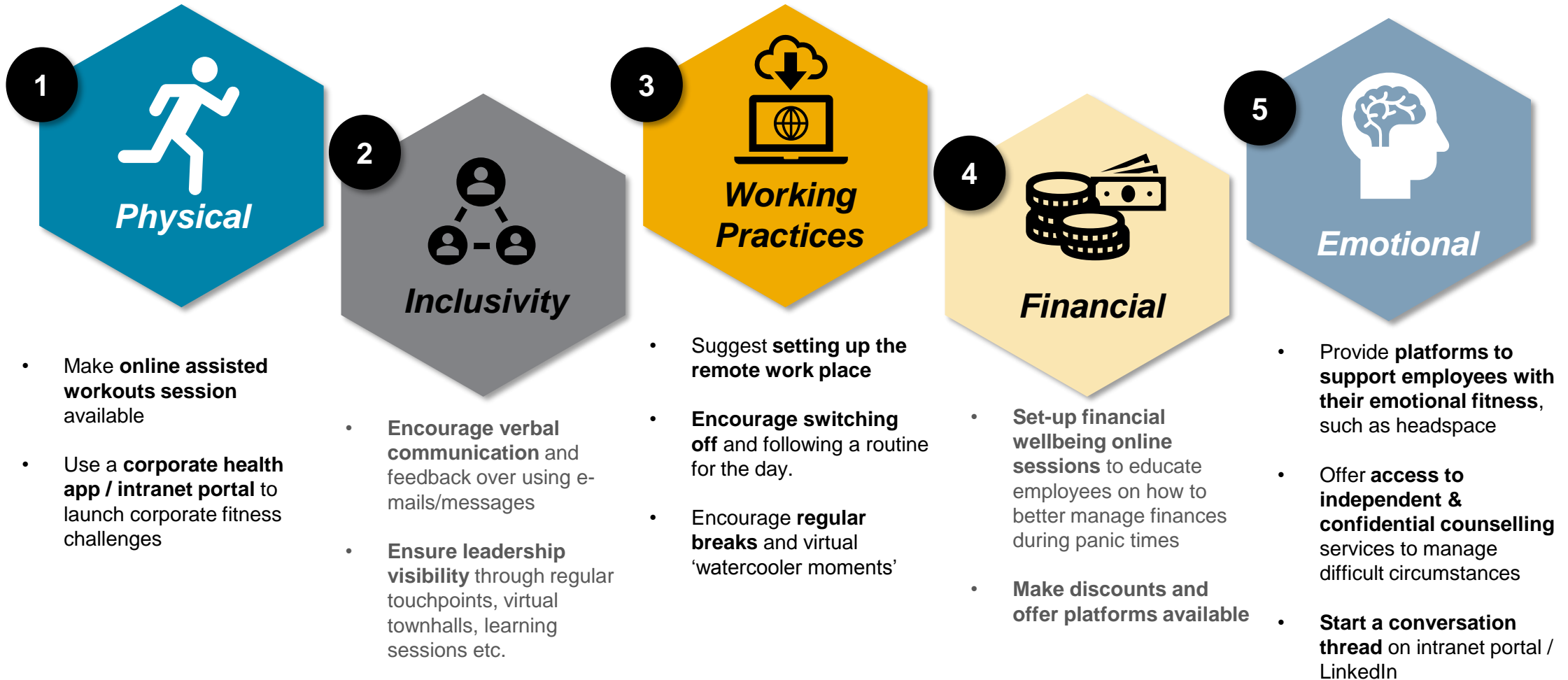
#### Crowdsource ideas with employees

It is critical that organizations ask employees to voice their ideas. By showing them, not just saying, that what they think matters, organizations will have a stronger buy-in for the initiatives they eventually prioritize

**T** Transactional    **R** Relational

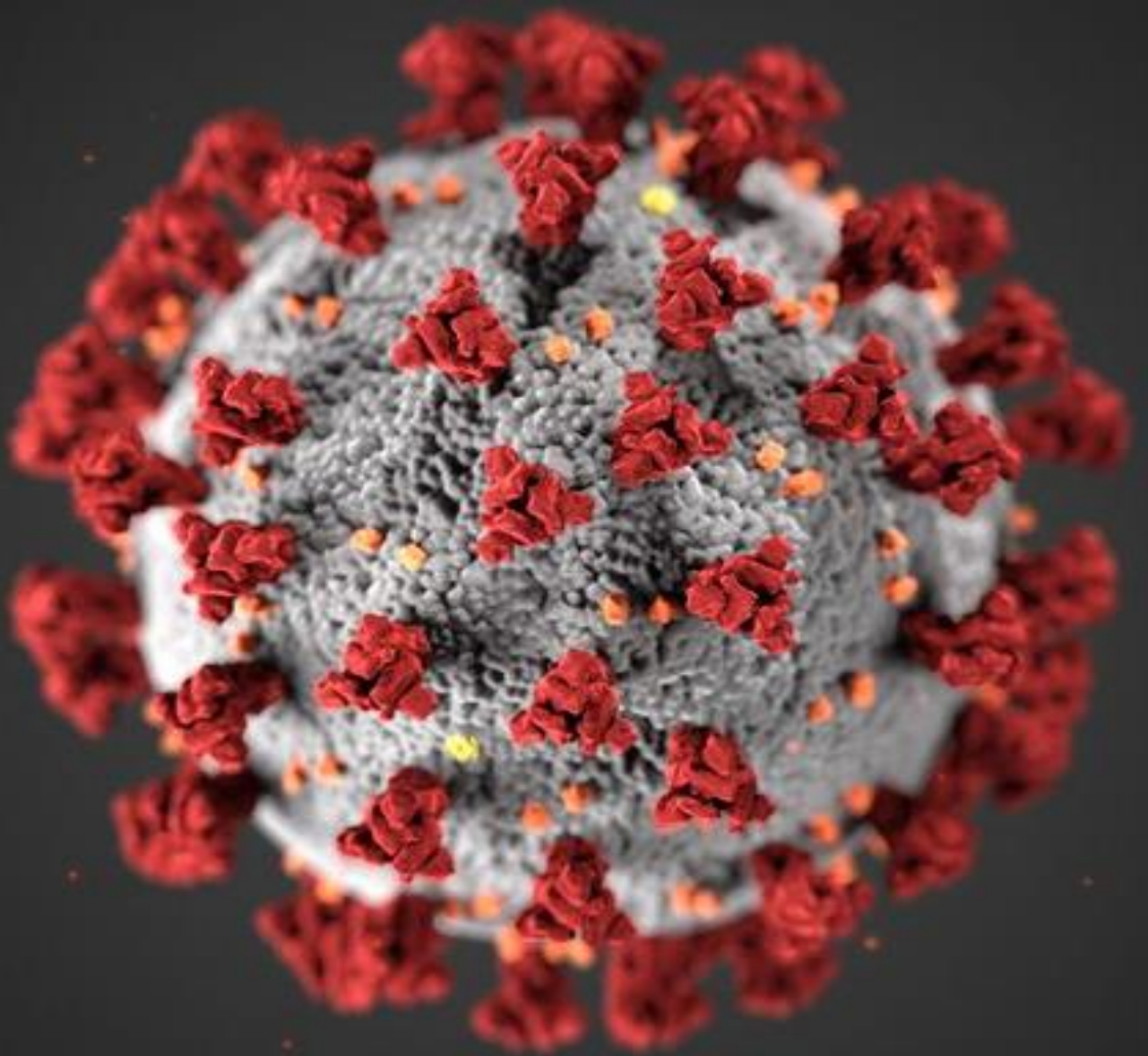
# Need of The Hour

## How HR Needs to Support Employee Wellbeing during Testing Times





# ***Additional Information***



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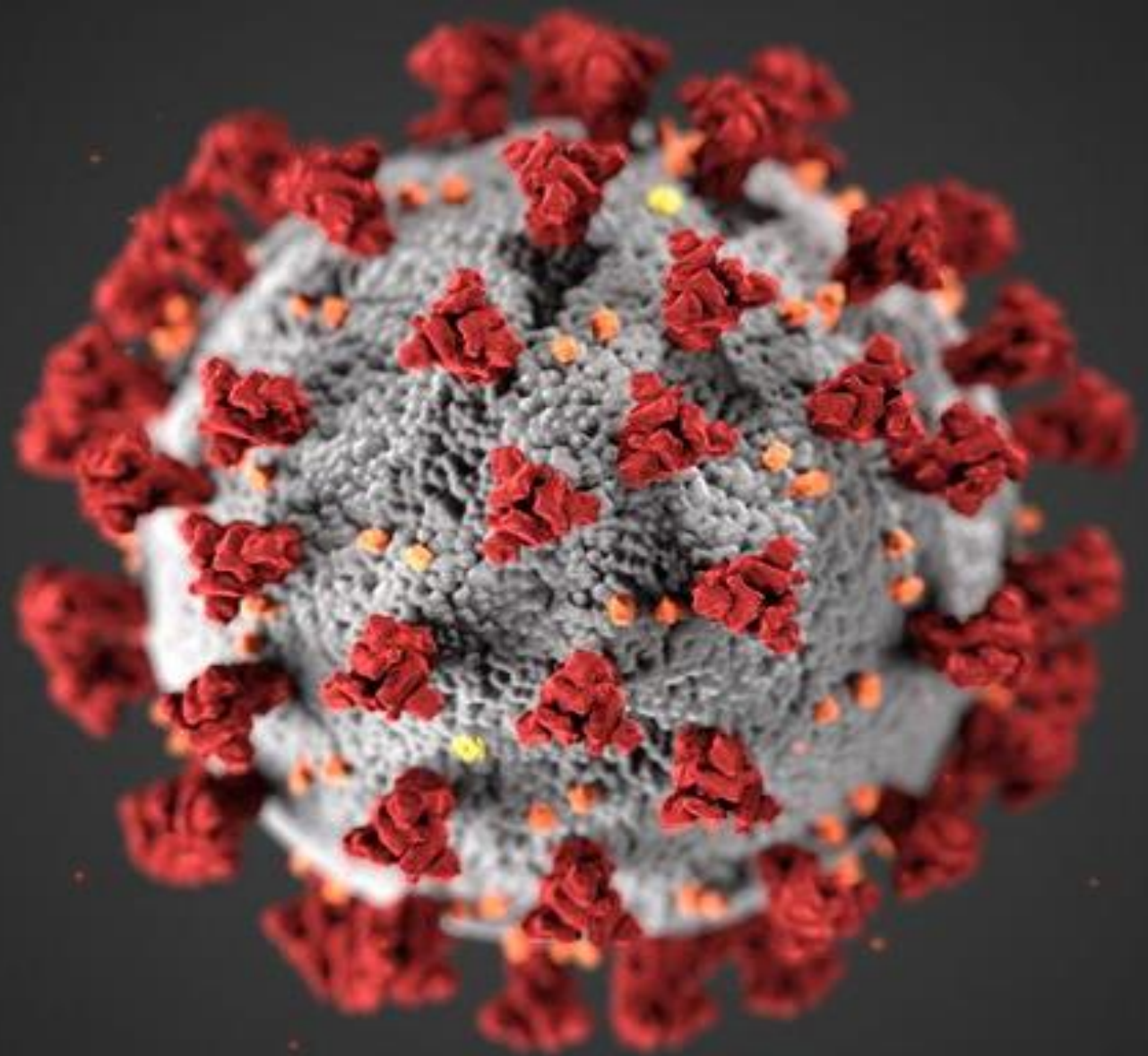
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# ***Study Participants***



# Participants

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## Auto

- Ashok Leyland Limited
- FiatIndia Automobiles
- Force Motors
- Ford Motor
- Hyundai Motors
- Honda Cars
- John Deere India
- Mahindra & Mahindra
- Maruti Suzuki
- MG Motor India
- Roop Automotive
- Royal Enfield
- Spark Minda Group

- Toyota Kirloskar Motors
- Volvo India

## BFSI

- Aditya Birla Finance
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- Arohan Financial Services
- Bajaj Auto
- Bharti Axa General Insurance
- BNY Mellon
- Clix Capital
- Godrej Housing Finance
- HDB Financial Services
- HDFC LIFE
- Hero FinCorp

- HSBC
- IDFCFIRST Bank
- IIFL Wealth Management
- JM Financial
- Magma Fincorp
- Mahindra Finance
- Max Life Insurance
- Nomura Services
- RBL Bank
- Reliance Capital
- SBI Card
- Finastra
- First American India
- FIS Global

# Participants

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- Five Star Business Finance
- Gourmet Investments
- Home Credit India Finance
- Swiss Re
- VNS finance Capital Service

## Cement

- ACC Limited
- Emami Cement
- J K Cement
- Star Cement

## Conglomerate

- Aditya Birla Group
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## Consulting and Professional Services

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- Clifford Chance
- Coeus Age
- Edelman
- Egon Zehnder Information & Research Services
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- Gartner
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- Randstad

- S&P Global
- Vision and Magic Consulting

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- Fives India Engineering & Projects
- Fluor Corporation
- Larsen and Toubro Technology Services
- Quest

## E-Commerce & Retail

- Aditya Birla Fashion and Retail Limited
- ANI Technologies
- Cleartrip
- Flipkart
- GO-MMT

# Participants

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- Green Honchos Solutions
- Infiniti Retail
- Lifestyle International
- METRO Cash & Carry
- Myntra
- OYO
- Shop101
- Swiggy
- Tata UniStore
- Treebo

## Education

- Ashoka University
- Beinspired Education services
- Institute of Engineering and Management

- Khan Academy India

## Energy/Power

- GP Petroleums
- Indian Oil
- Indraprastha
- Ather Energy
- Calcutta Electric Supply Corporation
- HPCL Mittal Energy
- Nayara Energy
- NTPC
- Odisha Power Generation Corporation
- Powermech Projects
- Shell
- Tata Power DDL

## FMCG

- Britannia Industries
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- HUL
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- Perfetti Van Melle
- Reckitt Benckiser
- Vista foods

# Participants

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## Healthcare

- Cadila Healthcare Limited
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- LV Prasad Eye Institute
- Ortho Clinical Diagnostics
- Teleflex Medical

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- ADInstruments
- Alliance Data Systems
- ANI Technologies
- Atos Syntel
- Bosch Limited
- Boston Scientific

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- CDK Global
- Cimpres
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- Cleartrip
- Compucom Systems
- Conduent
- ContractPod Technologies
- Cypress Semiconductor
- Deevita Technologies
- Deloitte Support Services
- Digicel

- Druva
- DXC Technologies
- Ekincare
- Epsilon
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- Flextronics
- Flipkart
- Gaian Solutions
- Games24x7
- GlobalLogic
- GO-MMT
- HCL Technologies



# Participants

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- IBM
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- Manipal Technologies
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- Mastek
- Media.net
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- Numerify Software
- NXP India . .
- ON Semiconductor
- Opus Consulting Solutions INC
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- Scoopwhoop Media
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- SmartDrive
- StepToStrategy Software Consulting
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# Participants

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- eClerx
- Egon Zehnder Information & Research Services
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- IGT Solutions
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- PwC SDC
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- Swiss Re
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- Axalta Coating Systems India
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- Flextronics
- Fujifilm India
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- Godrej Industries (Chemicals)
- GRP
- Hillrom
- Hindalco Industries
- IBA
- JCB
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- Strides Arcolab
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- Technip
- Terumo
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- Visteon
- Wiley India .
- Worley Parsons
- Zest

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- Novozymes

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## Real Estate

- Ajmera Realty and Infra India .
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- Brightstar Telecommunications India .
- British Telecom
- Digicel
- Tata Communications

## Textile

- A T. E. Enterprises
- Bombay Dyeing
- DCM Shriram
- Grasim Industries
- Raymond

***Thank You***

*Contact us:*

*Anirban.gupta@aon.com*

