

Intel Leadership Dialogue



October 04, 2013

Shiv | Bangalore

Structure

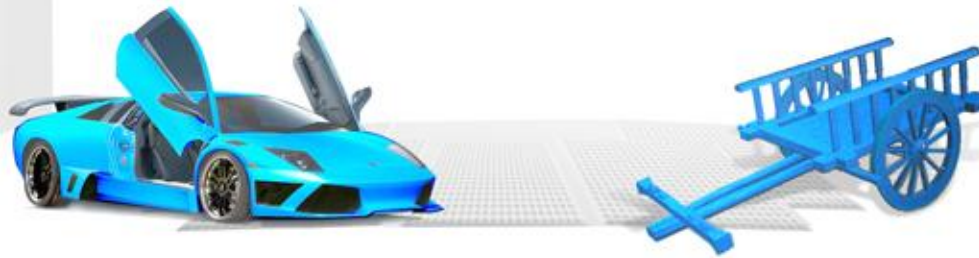
- Decoding India's Plurality
- **Winning in Emerging Markets**
- **The Winning Leader**



Rich and Poor



Hi-Tech and Lo-Tech



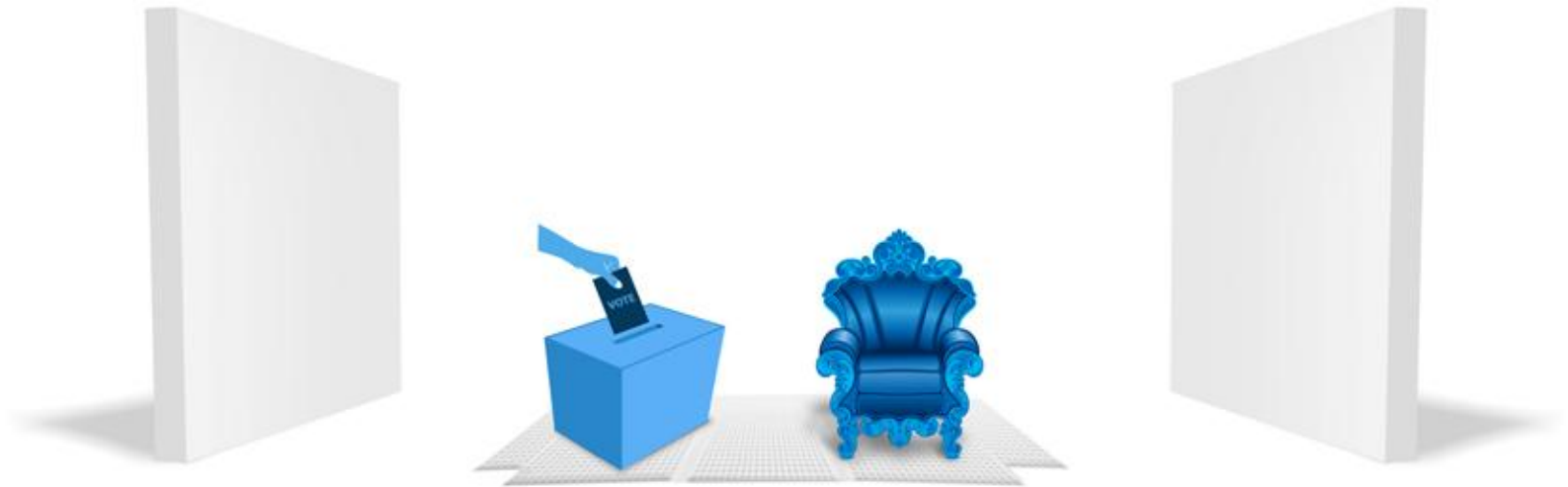
Poor Physical + Rich Digital Infrastructure



Growth, Inflation and Unemployment.



Democracy, Sycophancy.



Top 30 cities, Quality of life.



Winning in Emerging Markets



Origin, Significance of Emerging Markets.

- 1970s – Less Economically Developed Countries
 - **2001-Jim O Neill Goldman Sachs BRIC**

Country- 2010	Projected GDP,\$trl	Actual GDP,\$ trl
Brazil	0.8	2.0
Russia	1	1.4
India	1.1	1.5
China	3.5	5.8
Total	6.4	10.7

Countries with > 100 mln. population

1980	2000	2020	2040
China	China	China	India
India	India	India	China
USA	USA	USA	USA
Indonesia	Indonesia	Indonesia	Nigeria
Russia	Brazil	Brazil	Indonesia
Brazil	Russia	Pakistan	Pakistan
Japan	Pakistan	Nigeria	Brazil
	Bangladesh	Bangladesh	Bangladesh
	Japan	Russia	Ethiopia
	Nigeria	Japan	Philippines
		Mexico	Mexico
		Ethiopia	Congo
		Philippines	Egypt
			Russia
			Japan
			Vietnam

FREE Countries

	1973	1993	2011
Total No of Countries	148	170	192
FREE	50	68	83
PARTLY FREE	37	64	57
NOT FREE	61	34	48

Source : Freedom House

GDP in 2050 – ADB Estimates

	GDP 2010 \$Trl	2050 GDP \$ Trillion
CHINA	5.9	65
USA	14.6	40
INDIA	1.7	40
INDONESIA	0.7	12
BRAZIL*	2.1	10
MEXICO*	1.0	5
RUSSIA*	1.5	5

Savings in Emerging markets

	% Savings		% Savings
USA	4.7	China	38
Britain	7.4	India	34.7
Germany	11	Brazil	6.8
Finland	2.2	Russia	11
France	16.8	Indonesia	~35
Italy	4.5	Thailand	~35
Spain	12	Mexico	21

Source: OECD, Bloomberg

1. Vitality + Volatility



2. Access



3. Business Philosophy

Aspiration

Resource



4. Conduct



5. Brands and Value matter.

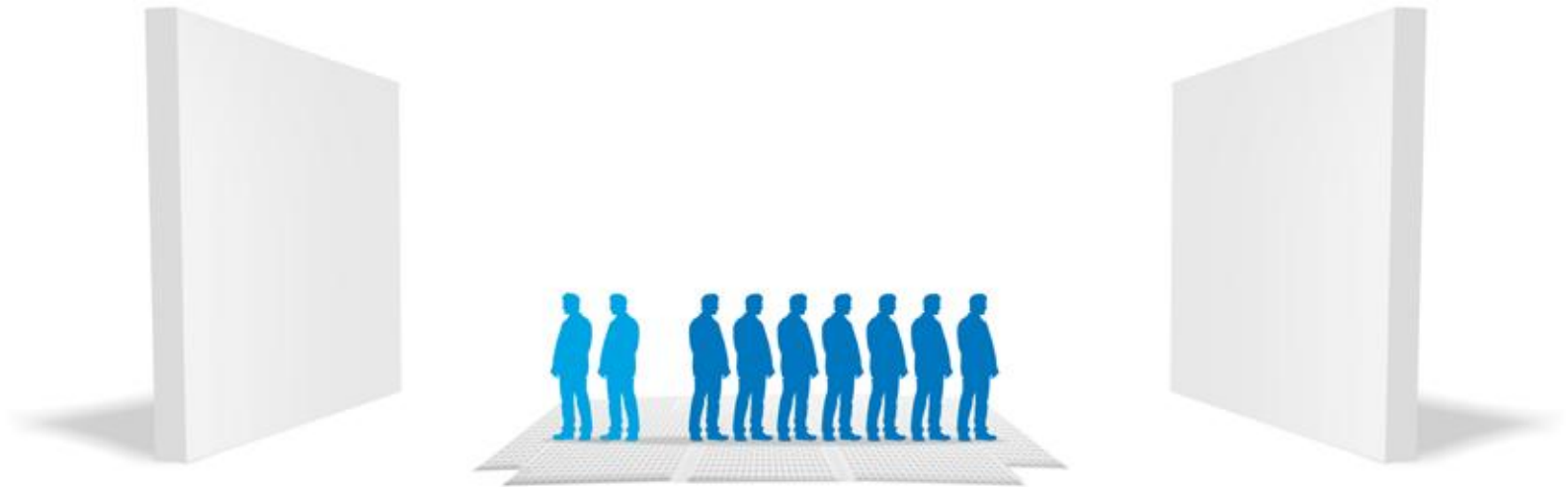
”Rich people buy brands for vanity, poor people buy brands for security”



**6. This is not a QSQT
(Quarter se Quarter tak) game.**



**A Matrix is not a license to start a
non co-operation movement**



Geography

BU

Function



75:50:25



Management Concepts 1950-2013

Managerial Grid; Decision Trees; Theories X,Y,Z; Tgroups; MBOs; Experience Curve; SBUs; Zero Based Budgeting; Value Chain; Excellence; MBWA; Restructuring; Portfolio Management; Quality Circles; kanban; Matrix, One Minute Managing; GE Mckinsey Matrix, BCG matrix; Shell Matrix; TSR, Shareholder Value; Porter 5 Forces; Strategic Intent; Core Competence; BOP; Re-engineering; TLAs- ABC,ERP,JIT,CRM,CSR; Lean

Management Jargon 2013

Structural, **Strategic**, **Circle Back**, **Motion**,
Rhythm, **Decompose**, **Bulls Eye**,
Disaggregate, **Right to Compete**, Guard
Rails, **Tram Lines**, **Going Forward**, **TOTB**,
Push the Envelope, **Win Win**, **Touch Base**,
Heads Up, Low Hanging Fruit, **PING**, Right
Size, **Streamlined**, **Takeaway**, **Boiler Plate**
Deliverables, **Drill Down**, **Bandwidth**.

Word Inflation, Thought Recession.



Hiding behind a desk, rules and process.



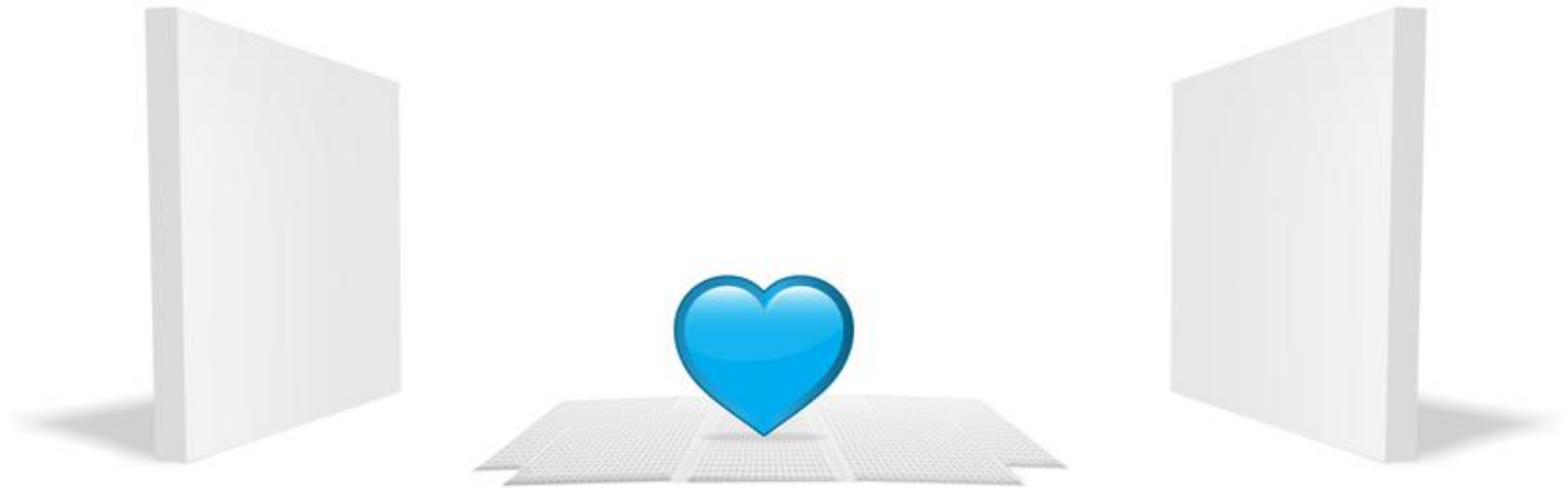
Culture, Turf Battles, Finger Pointing.



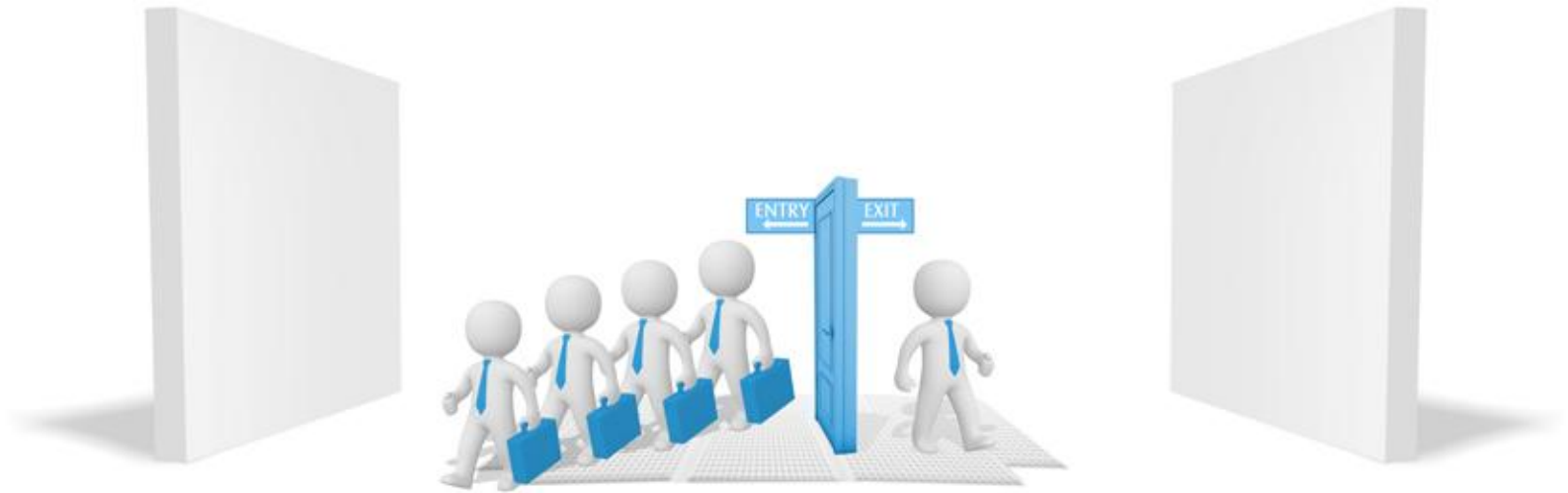
Why do people come to work?



The 'Dil Ka' connection



More Staying Interviews. Less Exit Interviews.



Meaning in PURPOSE, Institution Building.



Bring that Intel Pride back



Summary

- India and its plurality
- Emerging Markets and the 6 thoughts
 - The 'Dil ka' connection leader
 - Intel Pride

