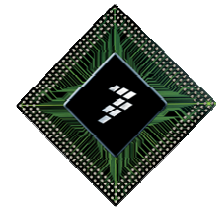


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## A Changing Landscape



**Dr. Vivek Mohindra**

Senior Vice President, Strategy and Business Transformation

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# A Changing Landscape

## Challenging Times

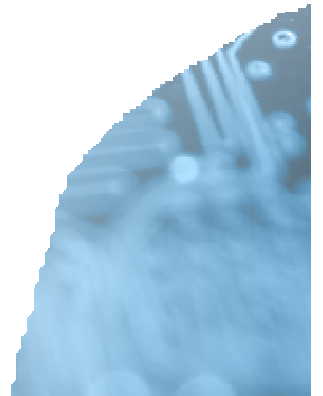
- Industry growth
- Survival
- Changing rules

## Some Things Remain the Same

- Continued knowledge base shift
- Value-chain shift
- Consumption/decisions around semiconductors
- Truly global growth from Asian companies

## Long-term Opportunities

- Scaling-up
- Helping customers win
- Bigger role in value-chain





## Requirements to Win

- **Customer Focus:** Local and Globally
- Growing Global **Talent Base**
- Access to Capital, **Financial Stability**
- Long-term **Commitment** to Growth Markets
- **Developing Capabilities** to Manage End-to-end Business Cycles

