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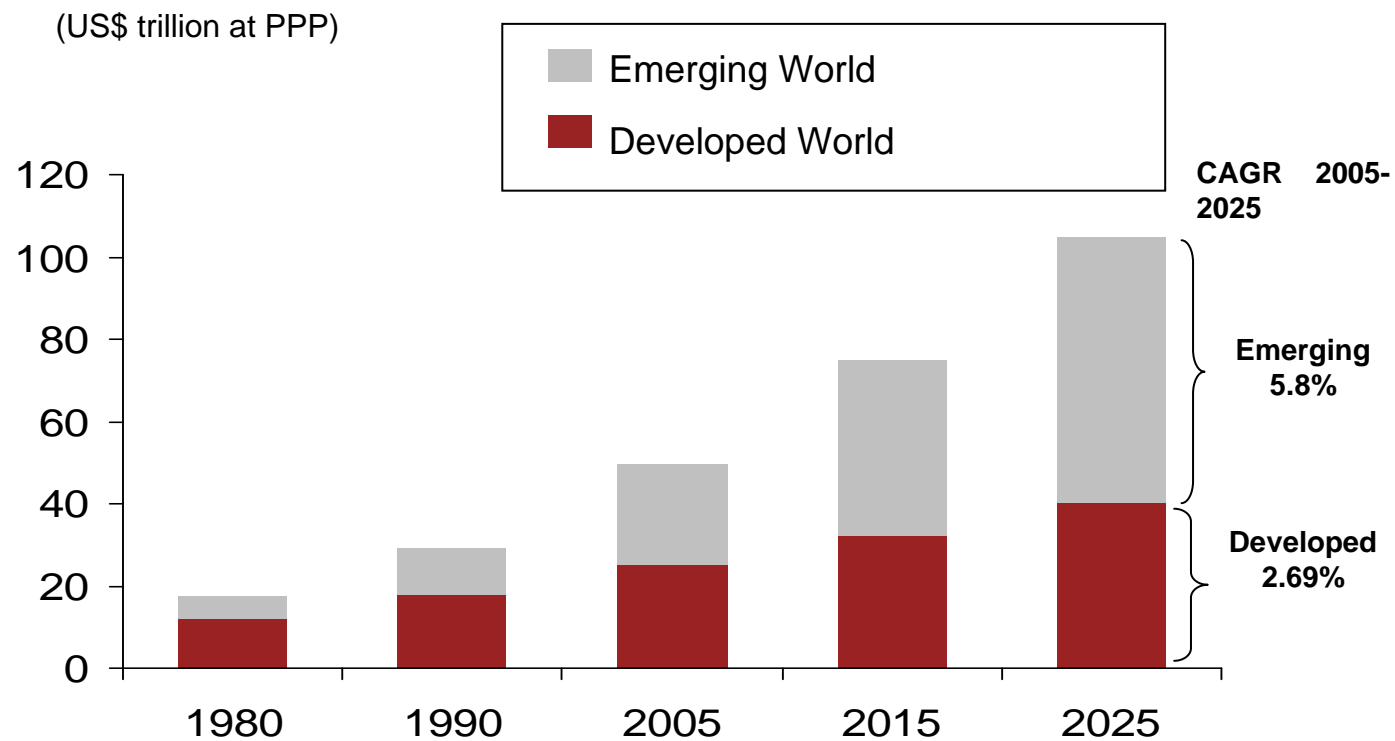
High performance. Delivered.

Talent Management in a Multi Polar World

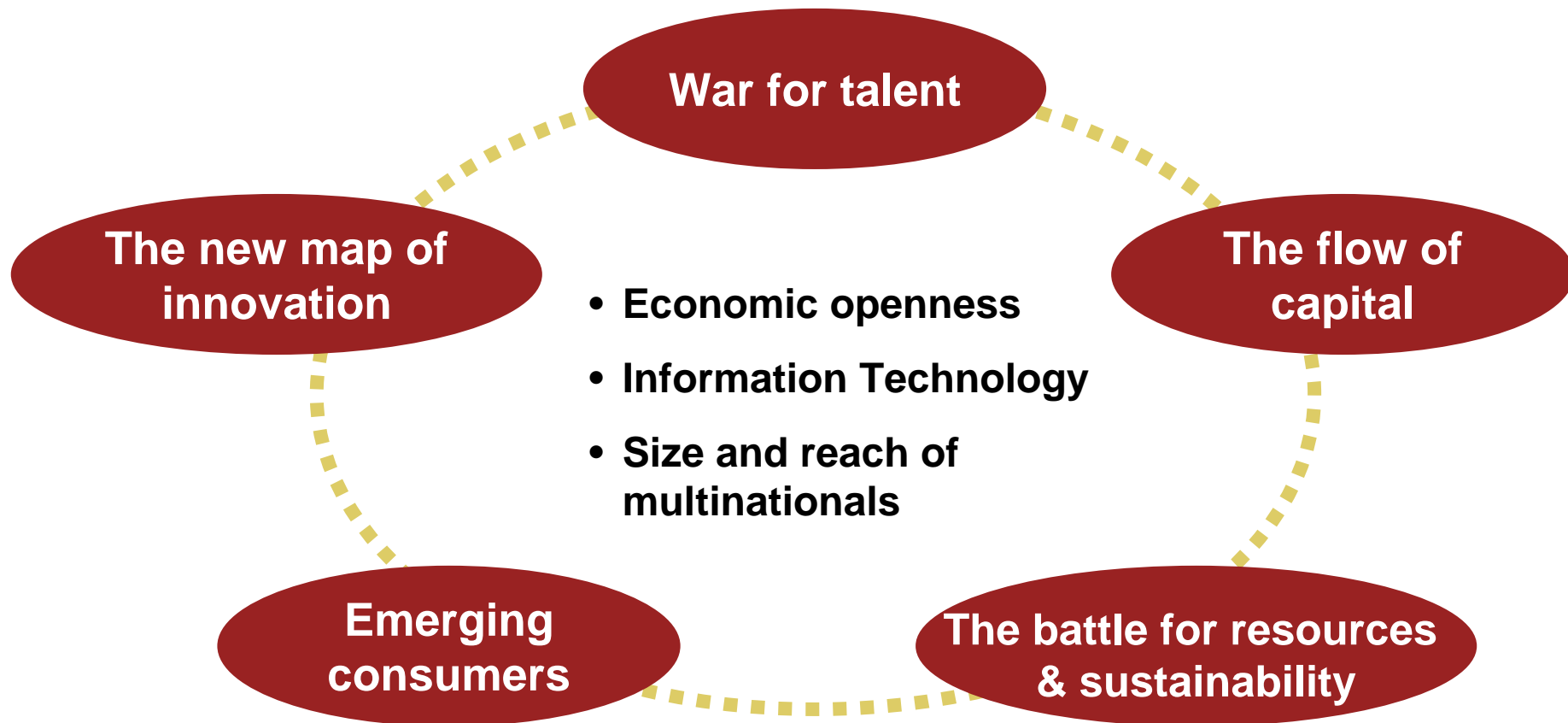
**John Mulholland
June 5, 2008**

The Multi-Polar World: Dispersal of Global Economic Power

Share of global GDP



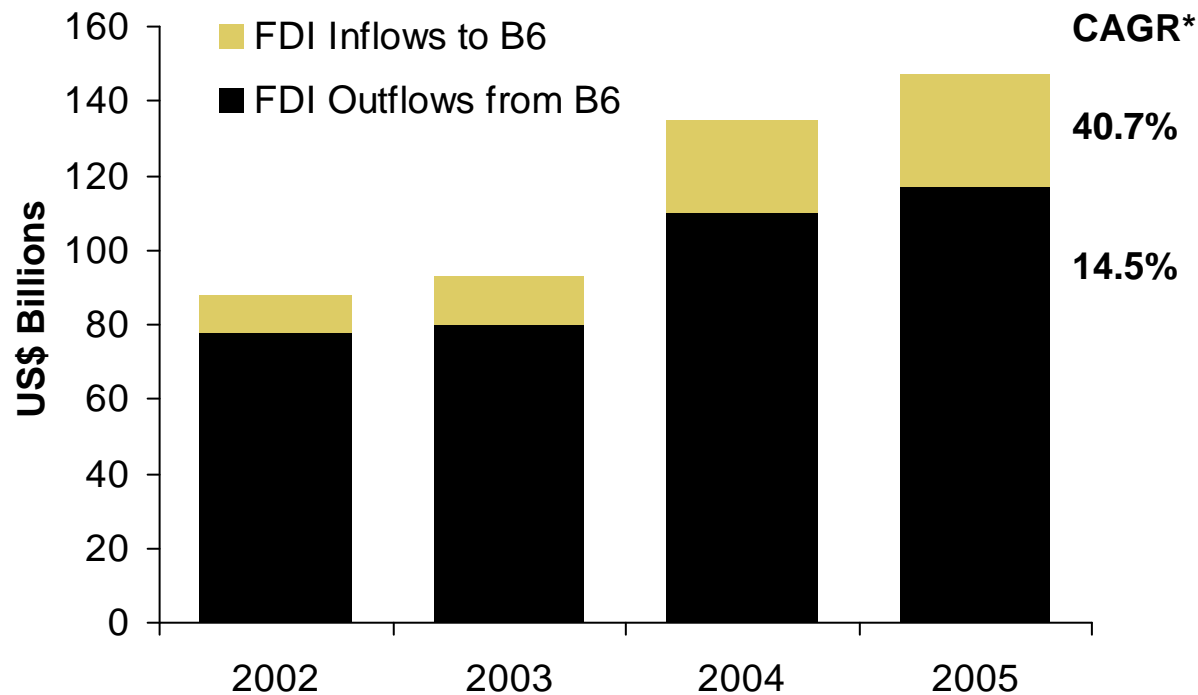
Emergence of a Multi Polar World



Bi-Directional Flow of Capital

B6 Inflows and Outflows 2002 – 2005

US\$ Billions



- Capital outflows from the “Big 6” emerging economies are growing at almost three times the rate of capital inflows

*Compound Annual Growth Rate

B6: Big Six = Brazil, China, India, Mexico, Russia and South Korea

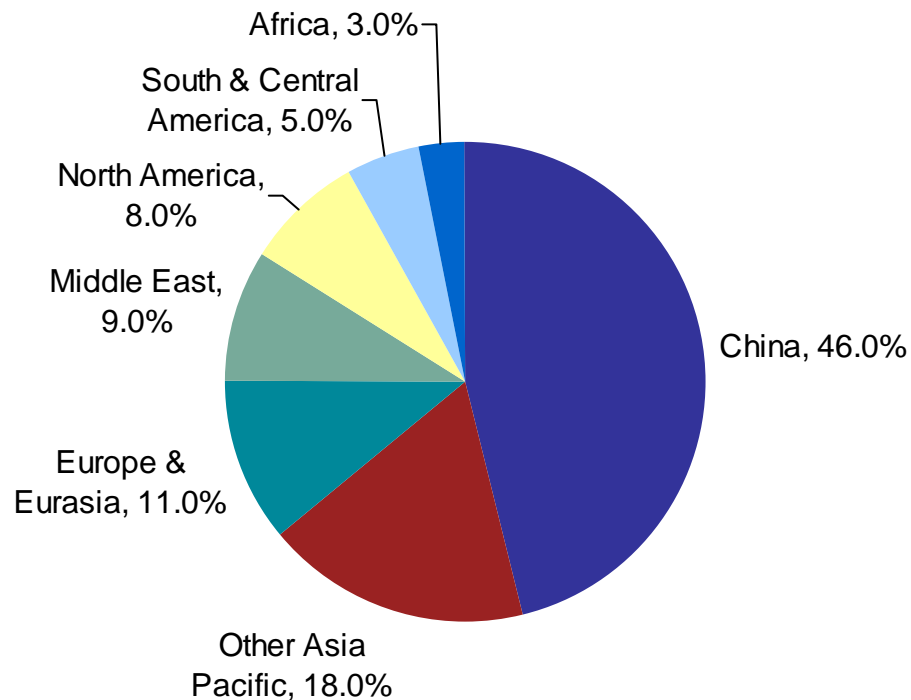
Source: *Rise of the Multi-Polar World*, Accenture, 2007

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Battle for Global Resources and Sustainability

Global Oil Consumption –

Sources of growth in global primary energy*
Consumption 2001-2006



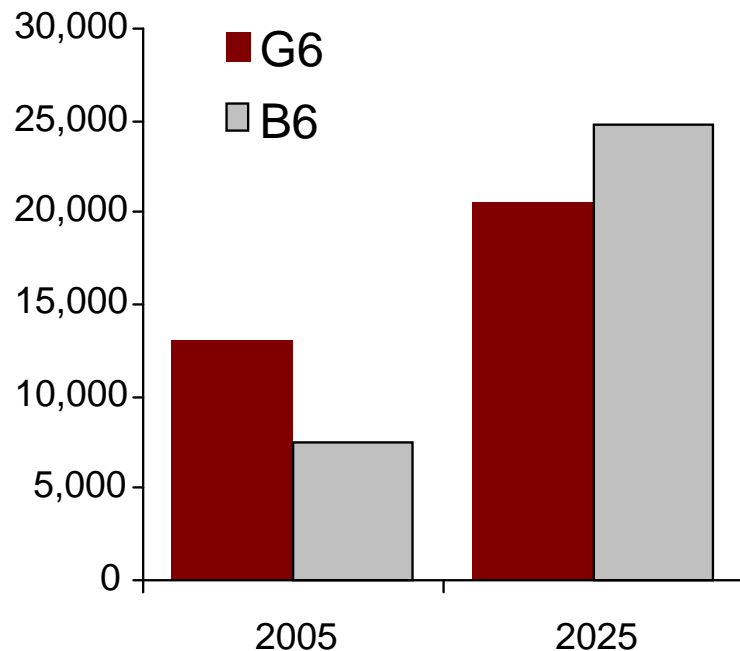
Oil, coal, natural gas, nuclear and hydro electricity
Source: BP Statistical Review of World Energy 2007

- Diversification of sources and resources
- Growth in innovation (e.g. bio-economy)
- Increasing importance of environmental impact and sustainability
- Continued activity of state-backed national energy champions
- Base Chemicals/Petrochemicals are getting closer to advantaged feedstock
- Base Chemicals/Petrochemicals are looking at new feedstock – CTL, GTL
- Bio based alternative routes – Ethanol based , Biotechnology

Emerging Consumers

New consumer markets – the rise of the 'B6'

Consumer expenditure (US\$ billions, PPP)



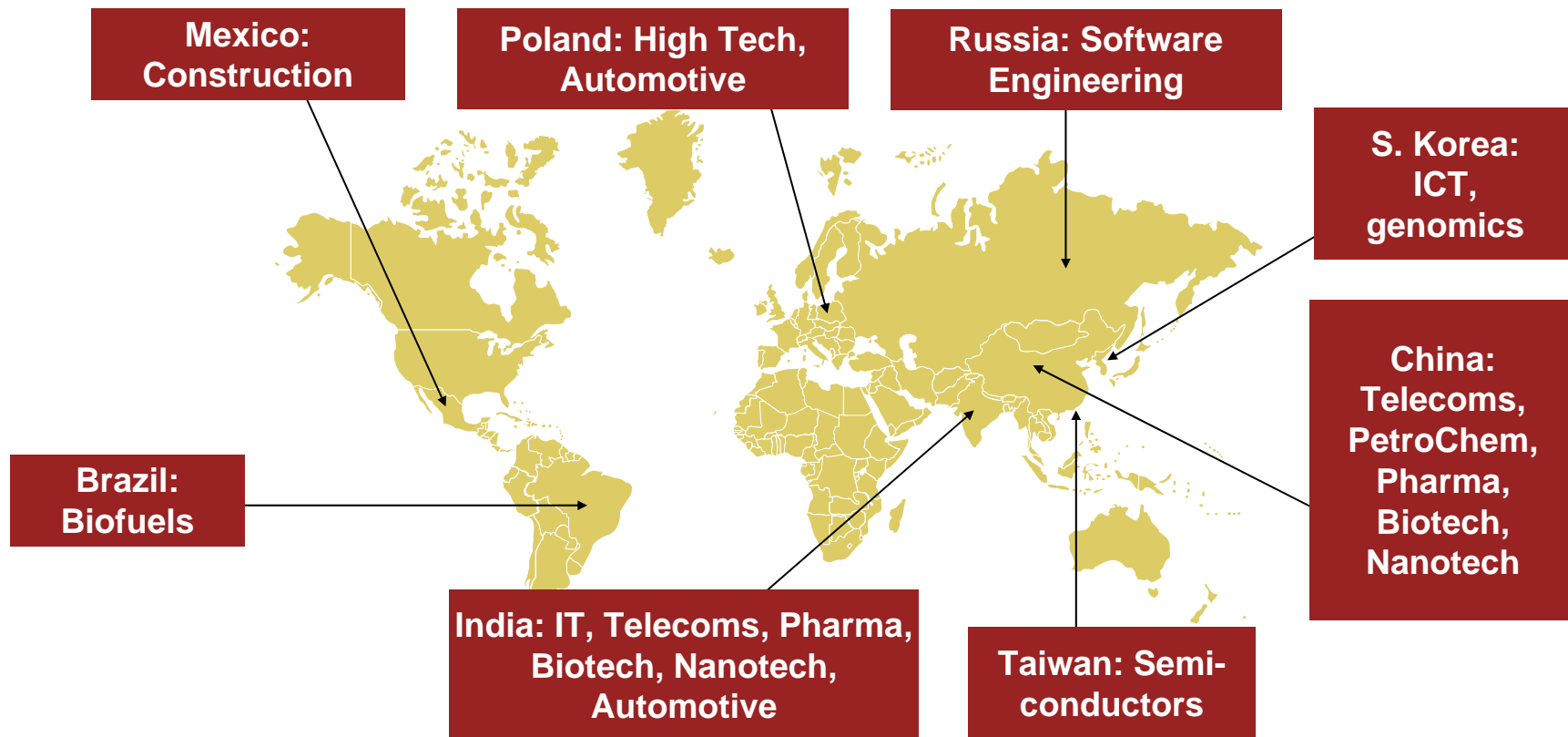
B6 = Six biggest emerging consumer markets:
China, India, Brazil, Russia, Mexico, South Korea

Source: EIU

- Future growth and scale of multinationals dependent on market share in emerging economies
- Globalization takes on non-Western characteristics
- Springboard for emerging market multinationals and test bed for product and service innovation
- Adaptation of business models to suit unique characteristics of emerging consumer markets
- China will double its per capita income in 10 years – 5x UK and US rates during industrial revolution

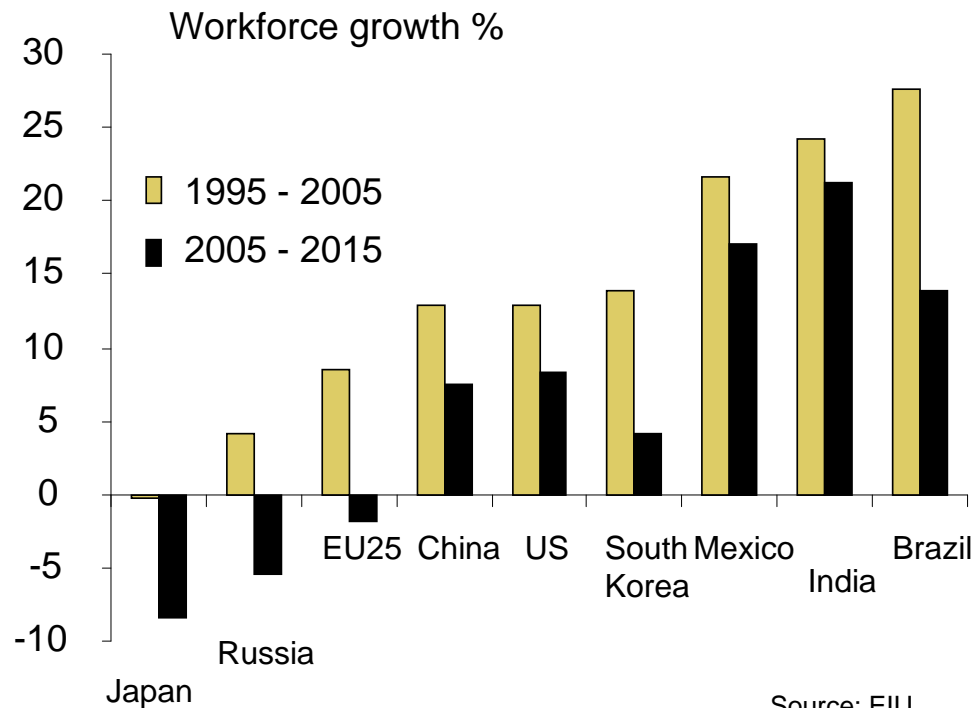
New Map of Innovation

Emerging Clusters Of Innovation



War for Talent: Macro Supply of Workforce

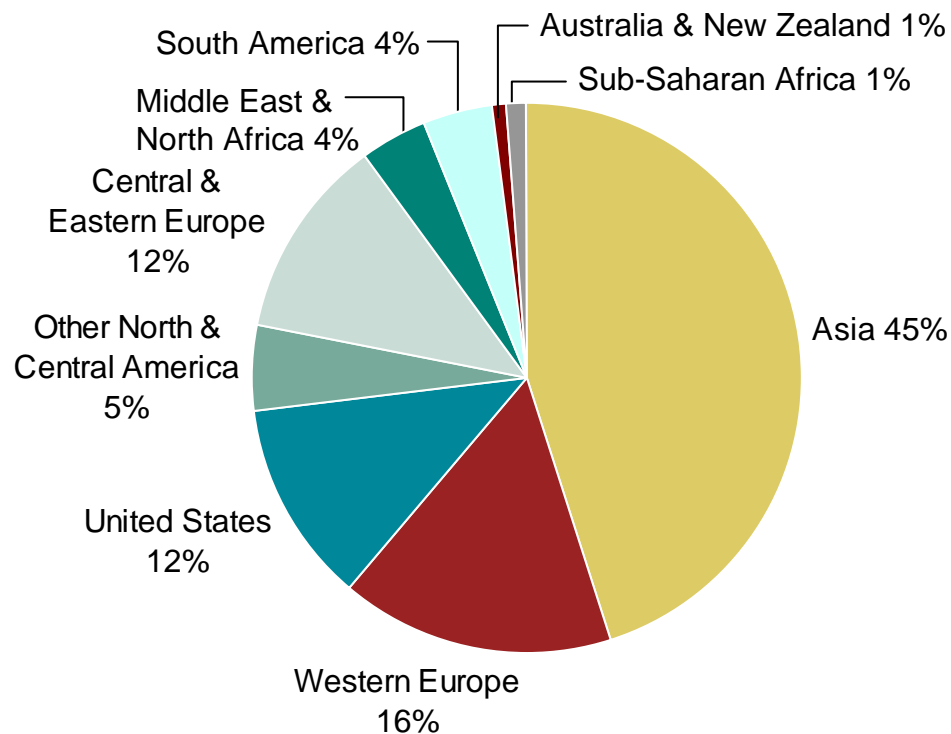
Shift in workforce size



- Emergence of differentiated workforces within companies
- Local tailoring and execution of global talent management strategies (hubs and spokes)
- Increased competition in ability to recruit and retain role-ready people
- Adaptation to the social fabric of society

Global Chemical Industry - Talent Supply

Geographic Origin of Science, Technology and Engineering Graduates (2006)

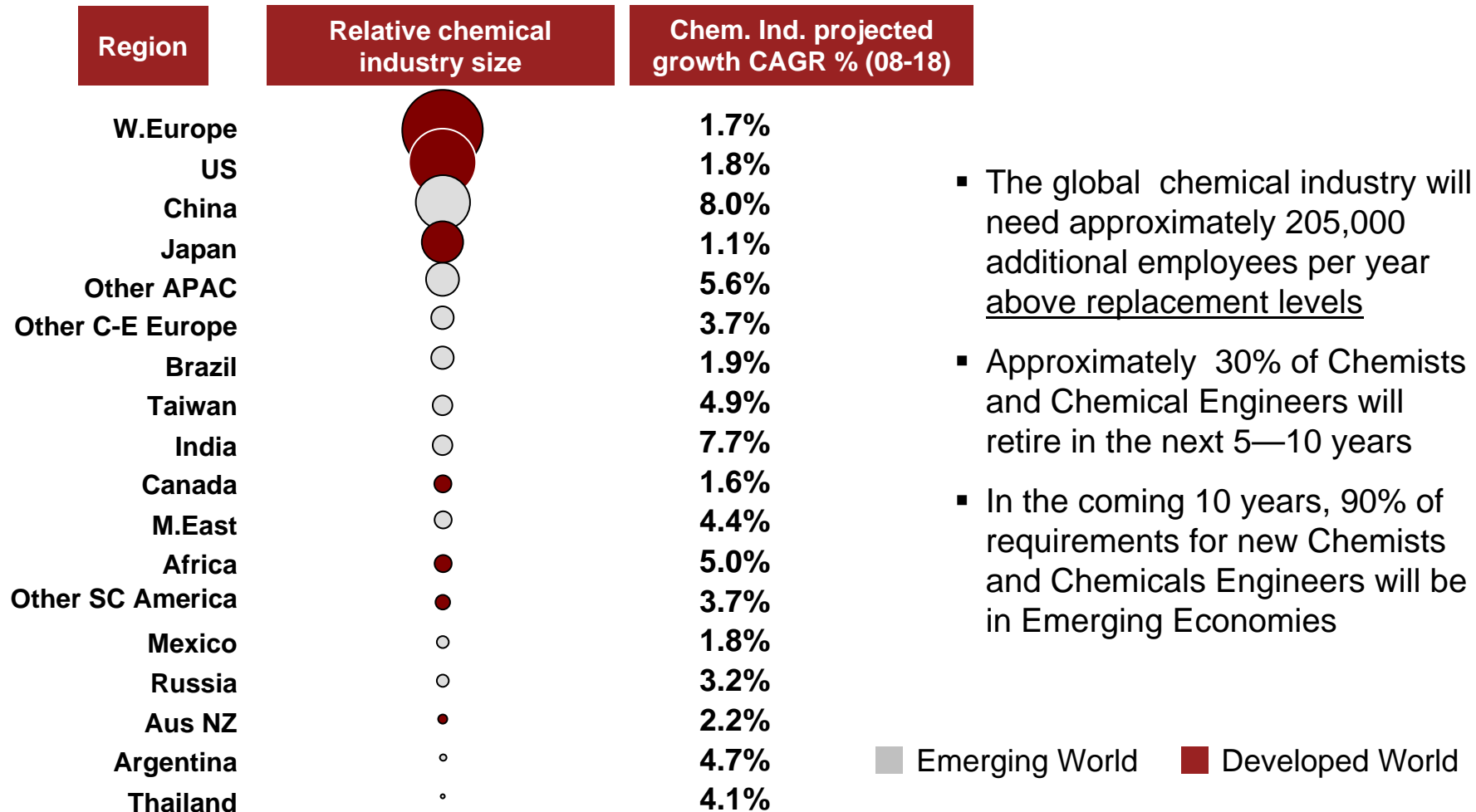


- The US and EU produce less than 30% of the world's science, technology and engineering graduates
- Chemical Industry ranks amongst Top 3 least attractive industries as perceived by North Americas graduates

Source: Science and Engineering Indicators, National Science Foundation, 2006.

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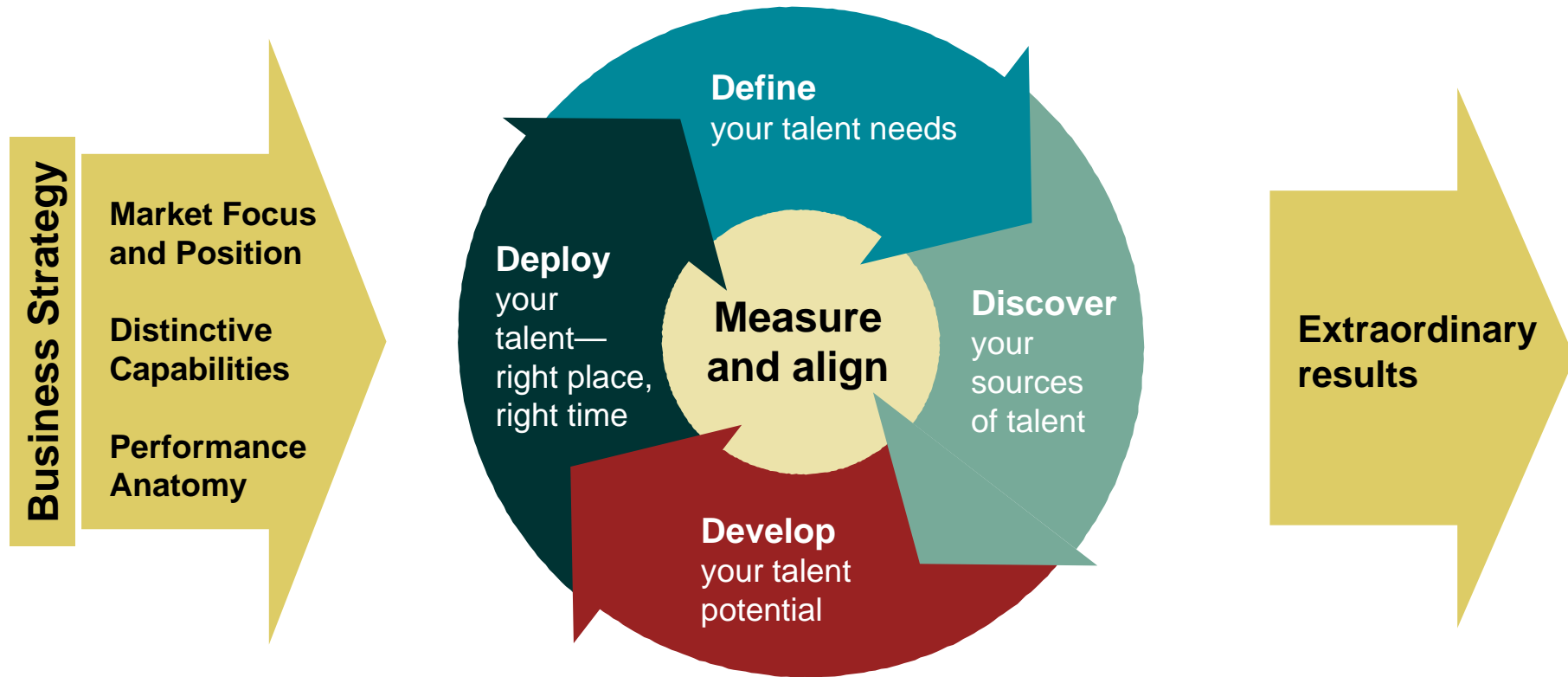
Global Chemical Industry - Talent Demand



Source: Accenture Research analysis of Global Insight's data and company annual reports.

High performers recognize the importance of talent management.

The Talent Powered Organization



The Elements of the Talent Powered Organization

Define talent needs

- strategic goals
- current and future talent needs
- mission-critical workforces
- key workforce skills and competencies

Discover new sources of talent

- diverse talent pools (e.g., emerging economies)
- novel options for accessing talent (e.g., university links)
- customized employee value propositions

Develop full potential

- skill, knowledge and competency investments
- development as part of daily work
- new career paths and incentives
- alignment of people development with strategy

Deploy right talent, place and time

- meaningful opportunities
- match individual talents/aspiration with organization's goals
- leverage diversity robust knowledge management and learning

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The Clock is Ticking ...

- **The world is changing at an accelerating rate**
- **The War for Talent is escalating**
- **Framework**
- **Easy to put off**

High Performers will not underestimate the talent management challenges posed by the multi-polar world.