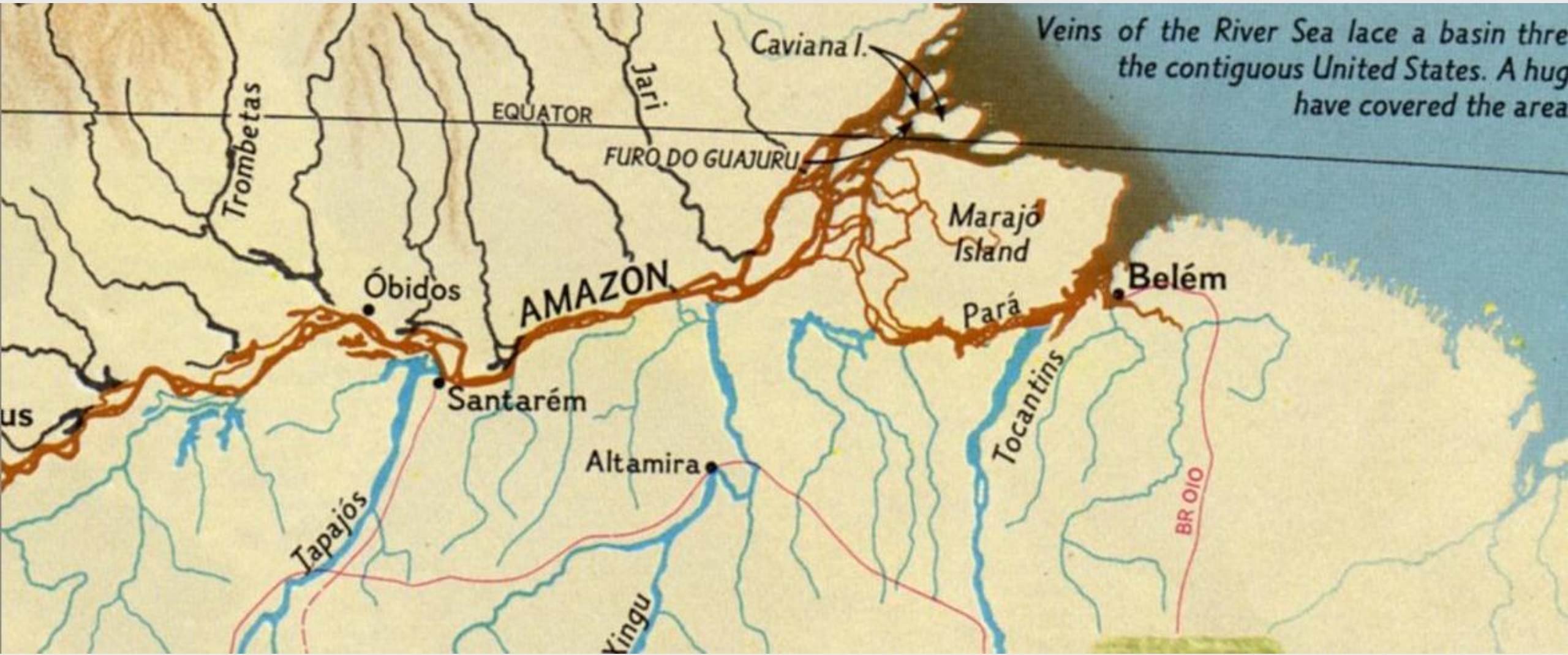
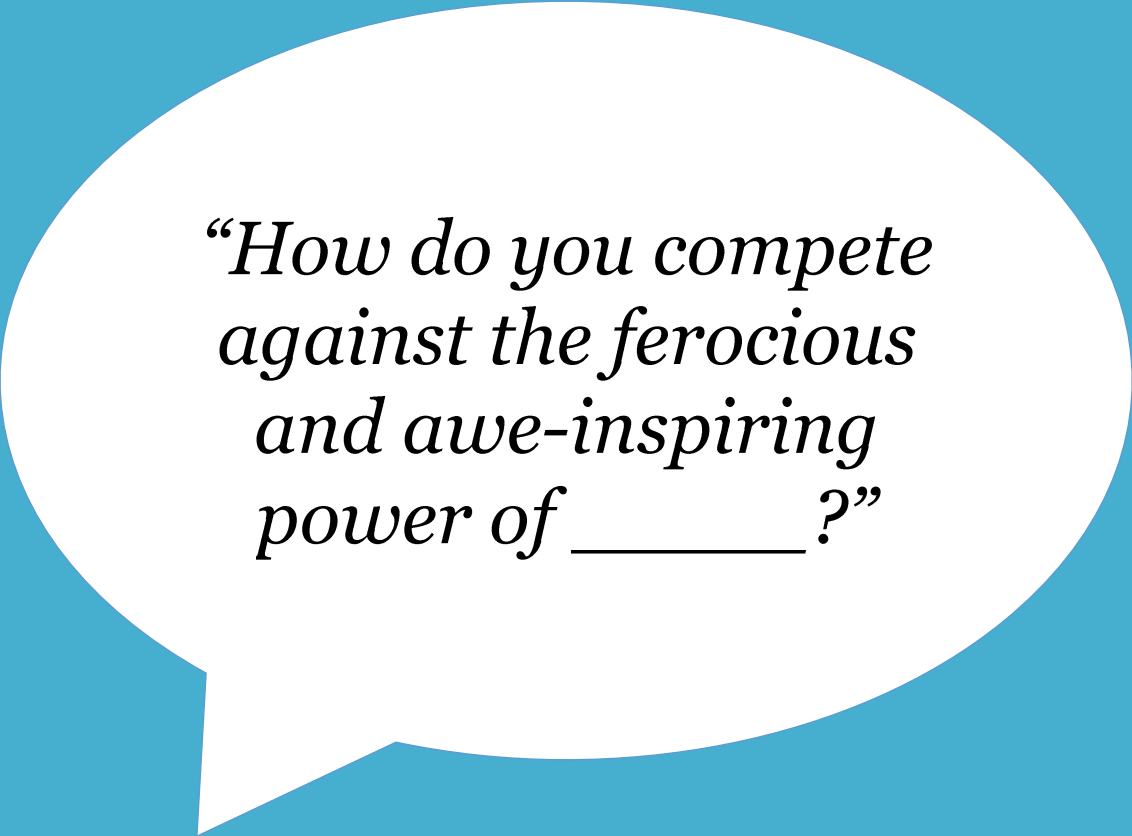


RETAIL ON THE WORLD STAGE

A GLOBAL E-TAILER PERSPECTIVE



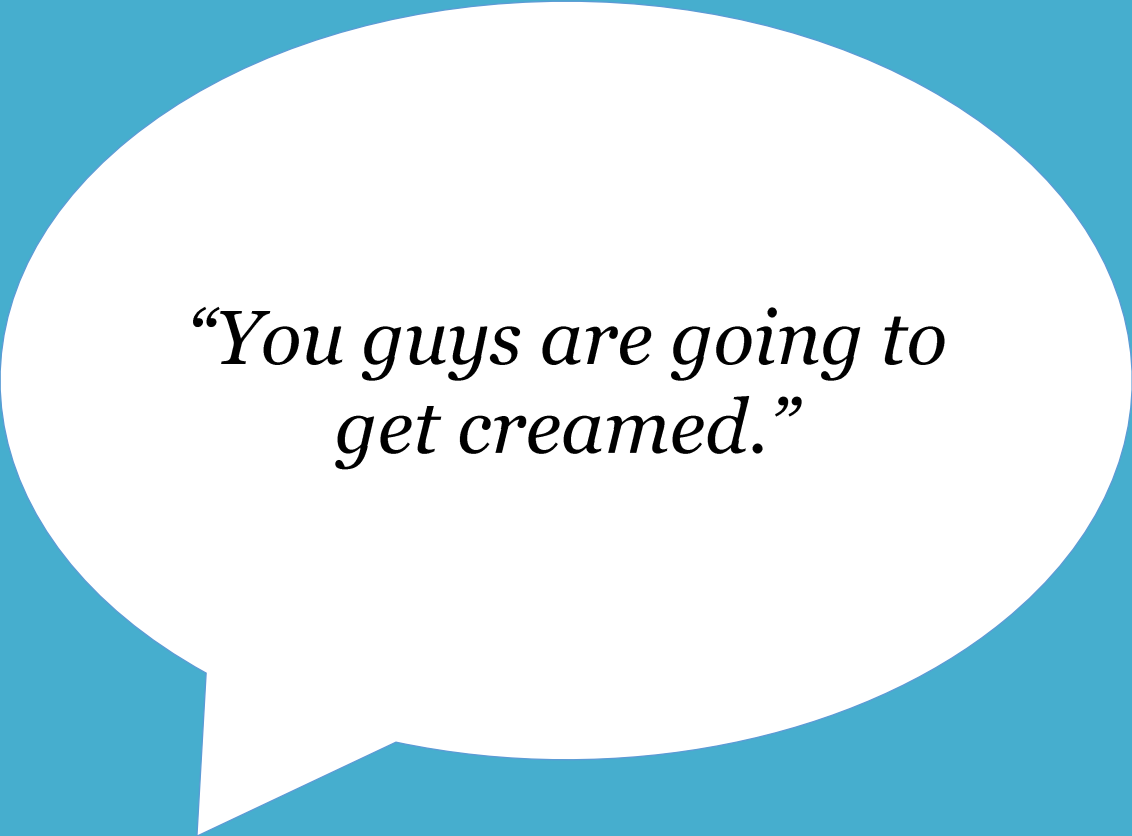




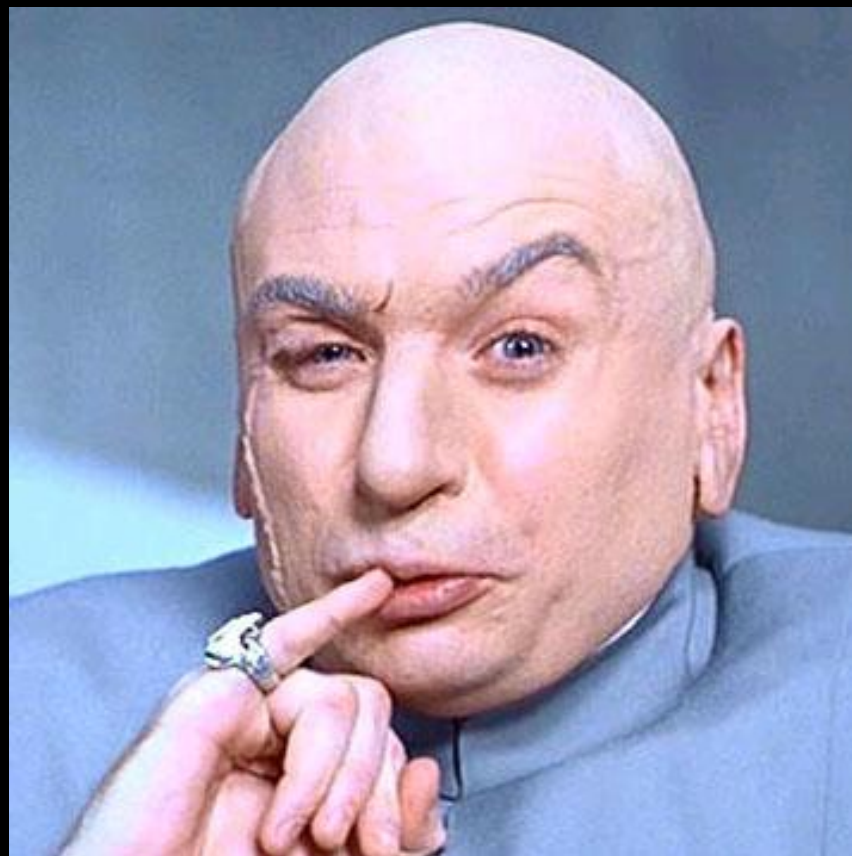
*“How do you compete
against the ferocious
and awe-inspiring
power of _____?”*



*“Can you tell me a bit
more about your
competitive
differentiators?”*

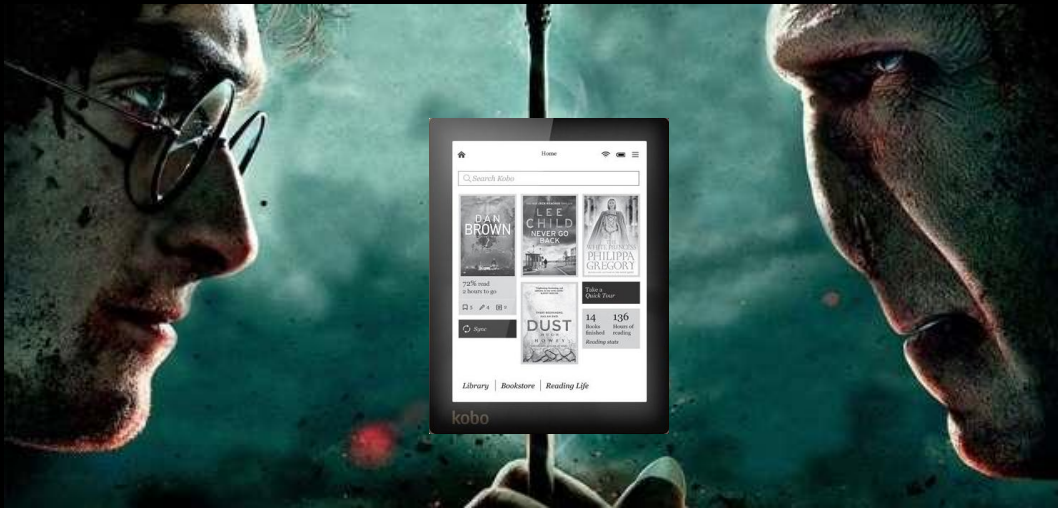


*“You guys are going to
get creamed.”*



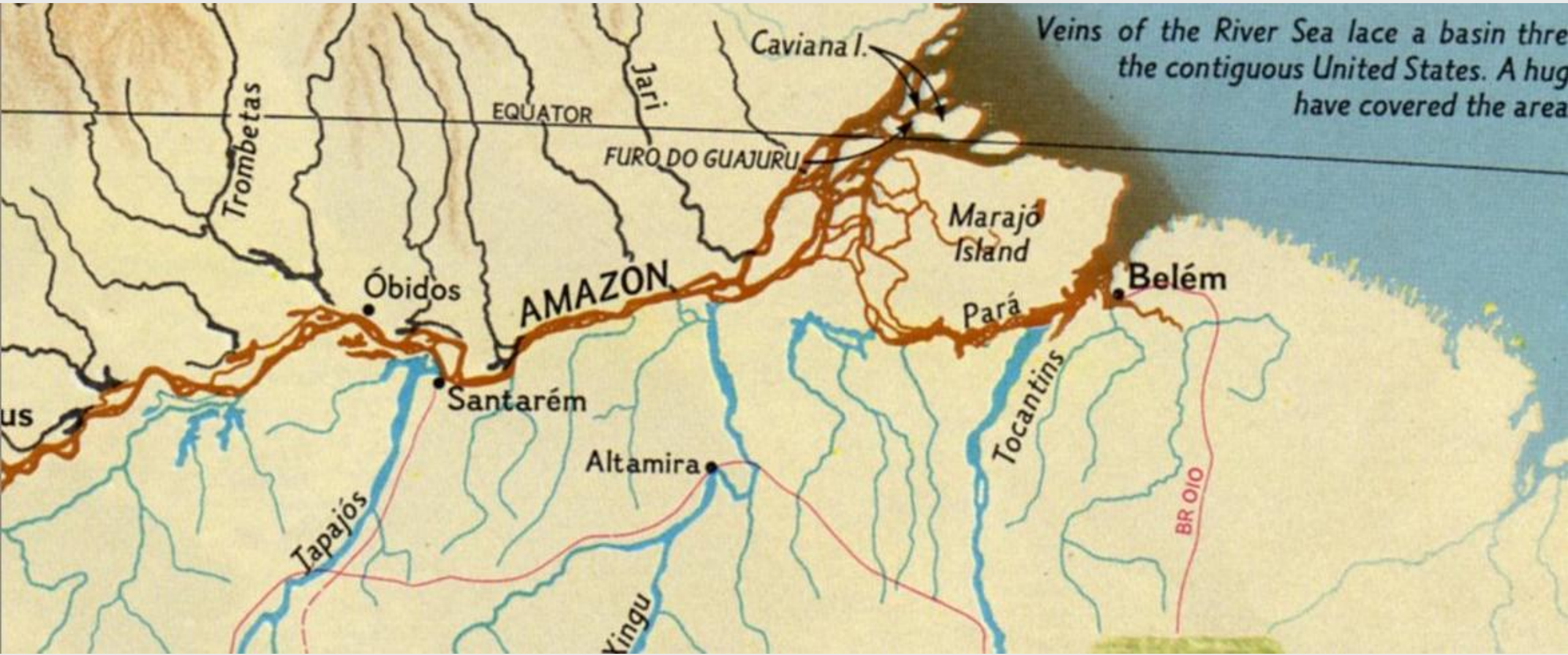






BEFORE 2009

AFTER 2009







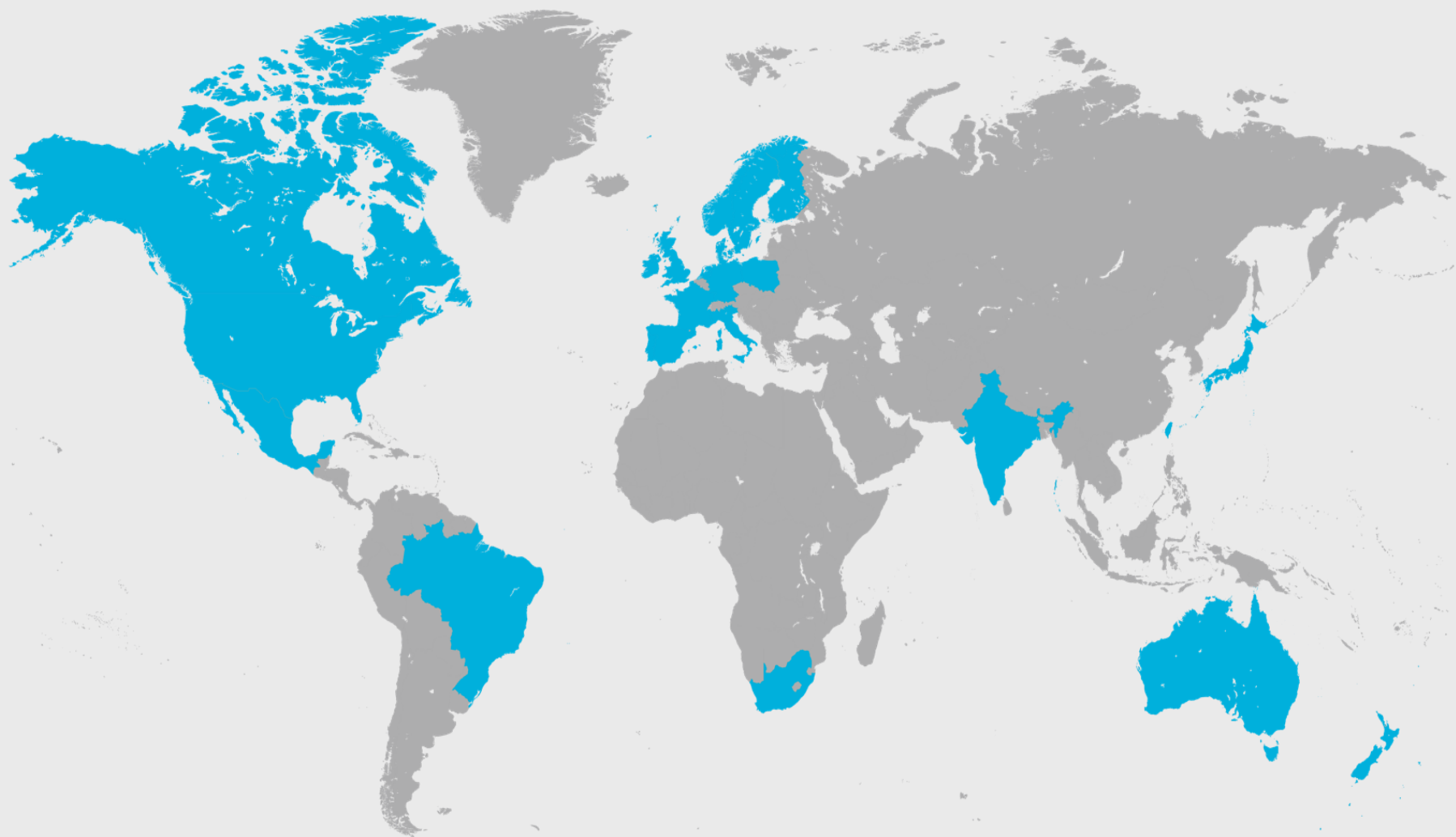
impossible

HOW DO YOU COMPETE?

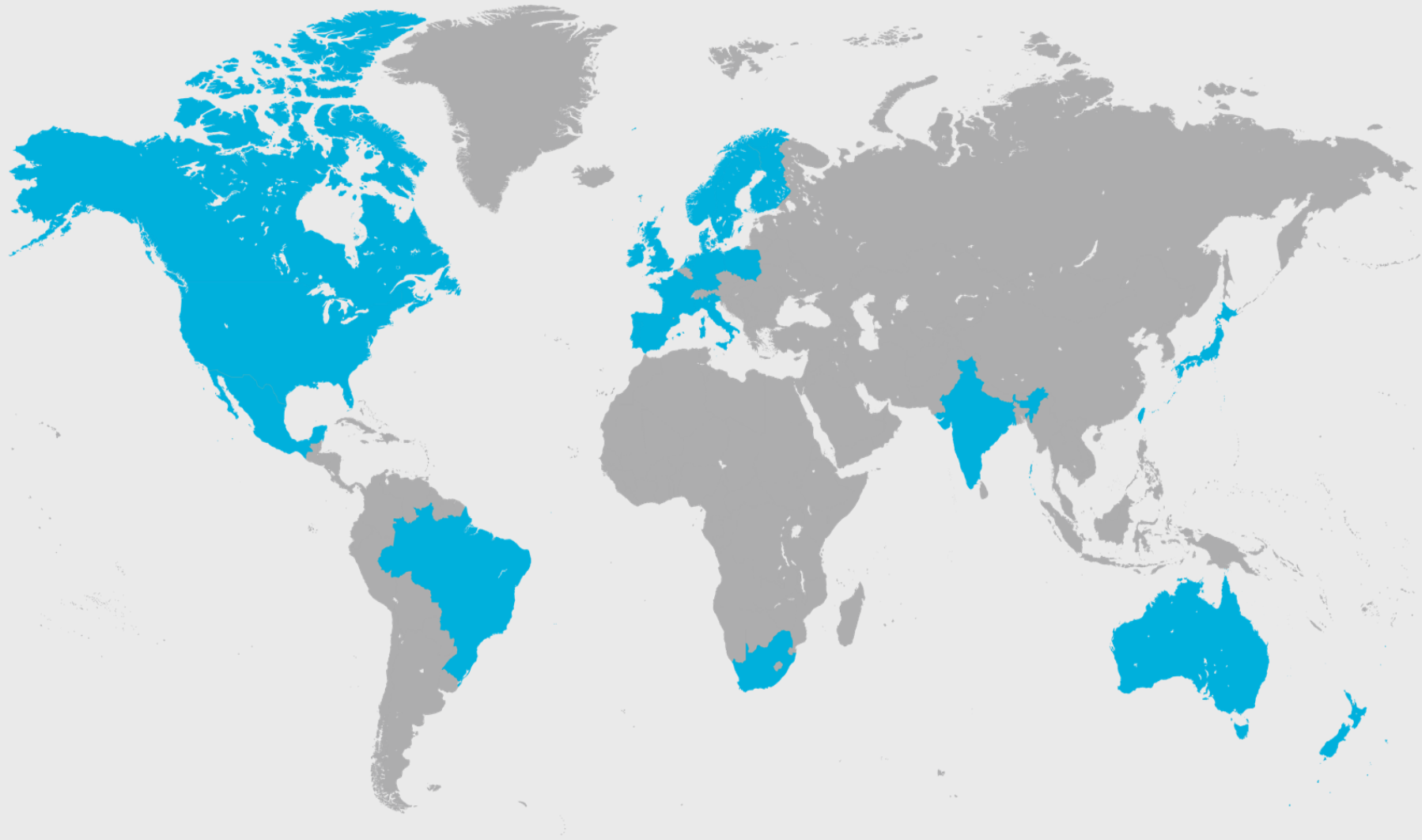
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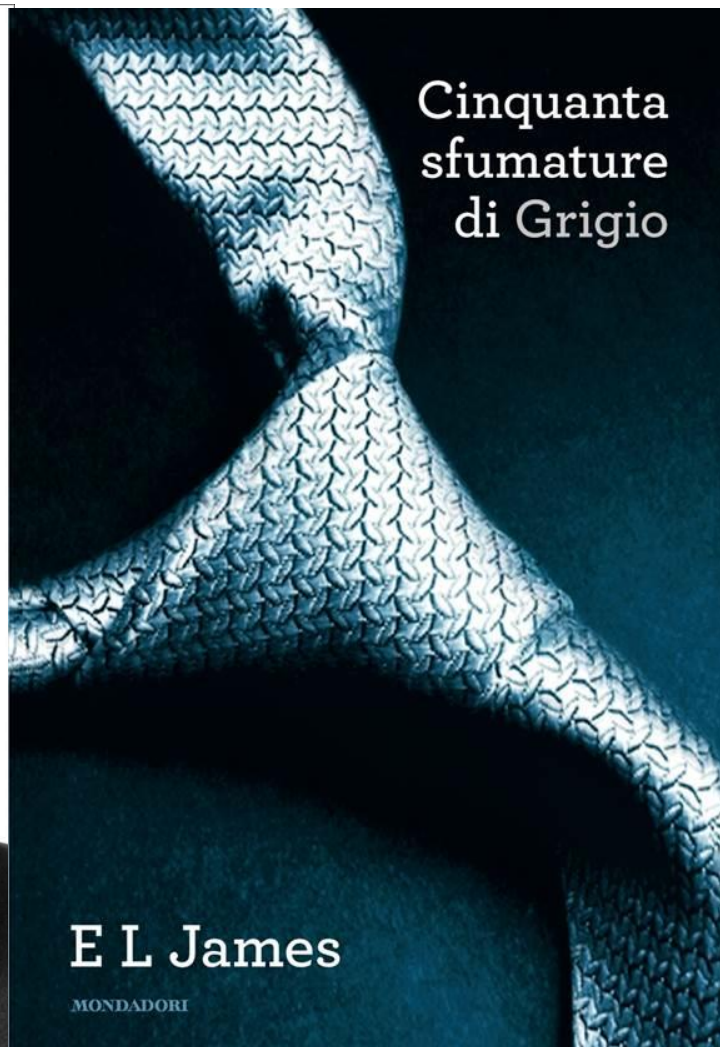
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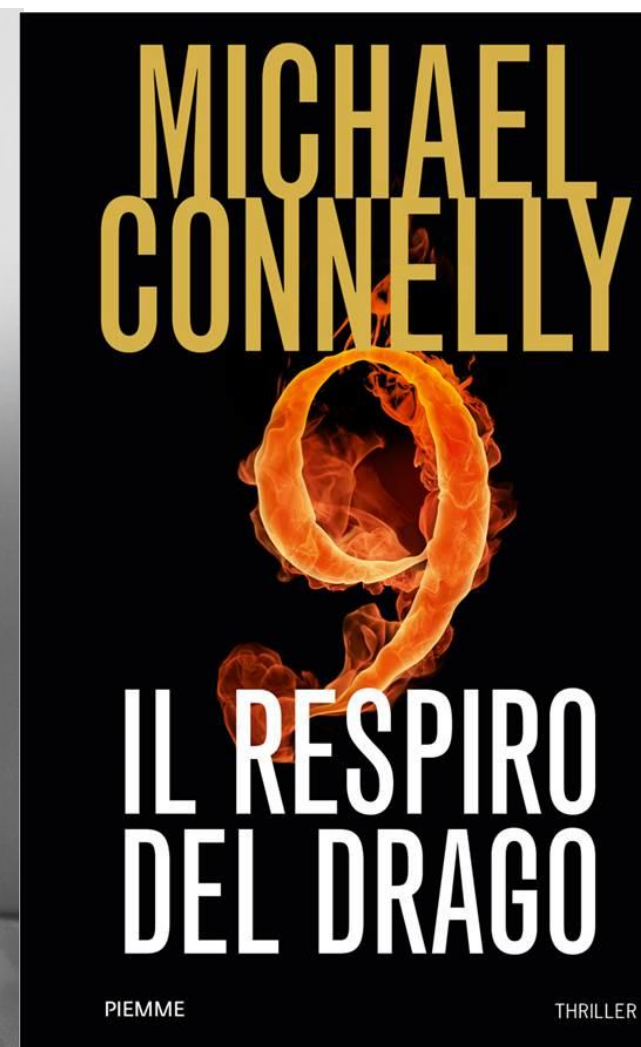
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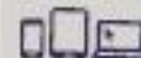
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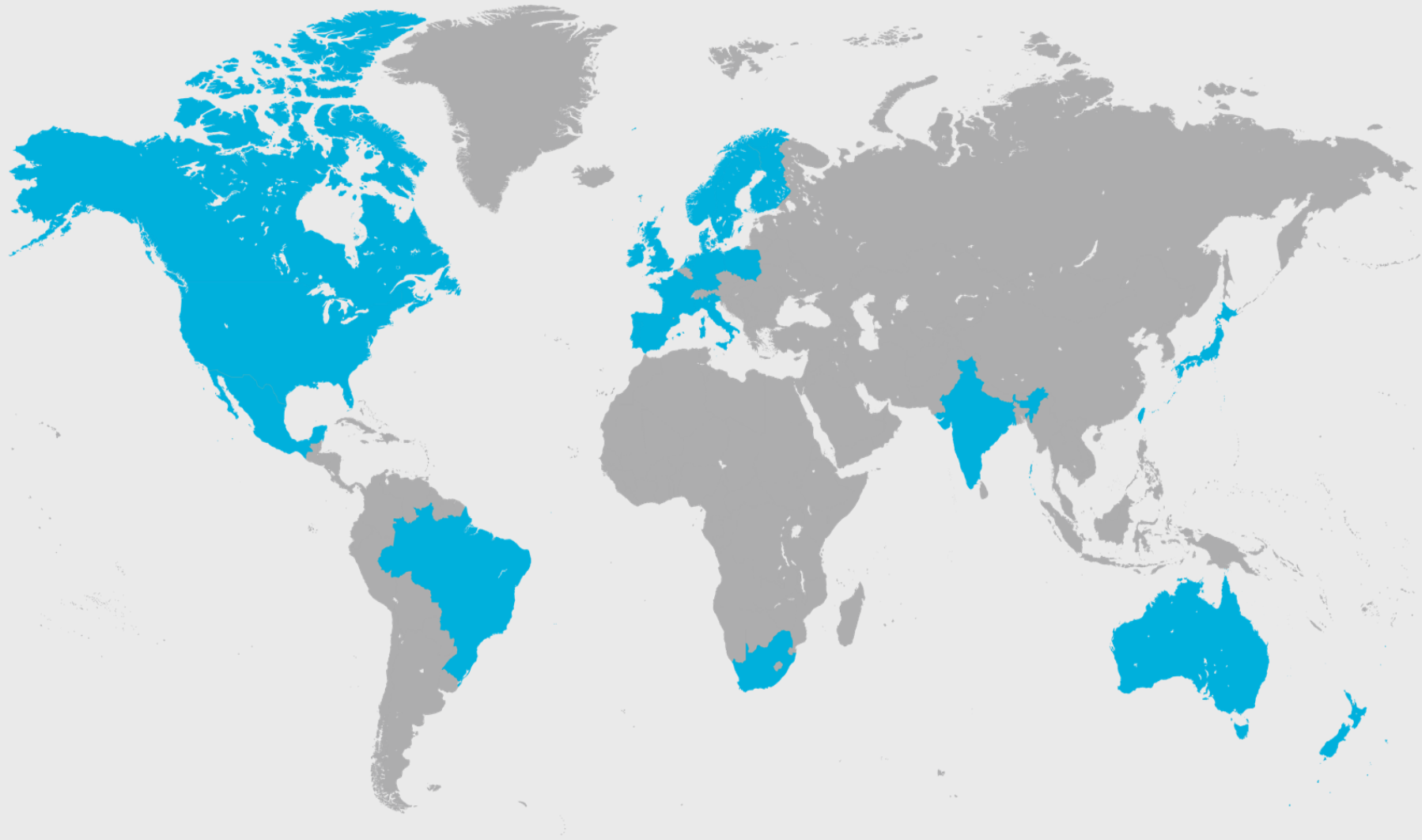
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