

The logo for 'moet' is centered at the top of the slide. It features the word 'moet' in a lowercase, sans-serif font. The letter 'o' is highlighted in a vibrant green color, while the other letters are black. A small 'TM' trademark symbol is positioned to the upper right of the 't'. Two thin green horizontal lines extend from the left and right sides of the 'o', passing through the 'm' and 't' respectively.

moet™

The Next Evolution in Ecommerce Fulfilment

Value Creation in the Networked Economy through Strategic Cooperation

Coopetition is...



...the act of cooperation between competing companies with partial congruence of interests to gain advantage by cooperation, generating more value by working together compared to the value created without interaction and thus struggling to achieve competitive advantage.

Achieve More by Working Together

Grow Current Markets

Expand current market through **complementary synergies / resources** of a few competitors

- Sony and Samsung's joint technology and manufacturing plants to grow the LCD TV market
- Car makers share resources to develop and leverage technologies (Peugeot, Citroen, Toyota)

Create New Markets

Work together with complementary resources and **reduce uncertainty through shared resources**

- The Blu-Ray consortium working with competitors to share risks and resources to set Blu-Ray as HD Video standard

Gain Resource Efficiency

Increased scale allows partners to **gain efficiency and access to complementary assets**

- Global airline industry forming alliances (e.g. STAR Alliance) to share marketing, logistics, and ticketing costs

Improve Competitive Position

Combining resources of a few competitors helps **protect market-share** from imminent threats

- AIM alliance between Apple, IBM, and Motorola created new computing standard and microprocessor markets.
- Kindle and iPad alliance fortified both Amazon's and Apple's position against competitors in the book industry

Description

Examples

Coopetition – USPS & UPS



Changing Dynamics of the Parcel Shipping Industry

- Explosion in parcel volume due to e-commerce
- Relationship between the players in the market is changing
- Coopetition is leading to a “win-win” situation

USPS Core Strengths

- “Last mile” connectivity
- Literally touches every doorstep, 153M delivery points
- Processing and handling capabilities that excel at smaller packages (< 5 lbs.)
- Low marginal delivery costs

UPS Core Strengths

- Highly automated distribution hubs that include larger vehicles, rail and airplane
- Superior routing logistics for large package transport
- Efficient airport-to-airport delivery
- Lower per unit upstream cost

Coopetition Results – USPS & UPS



Scope

- ✓ UPS picks up a package from the warehouse or distribution center and moves it through the UPS parcel network
- ✓ UPS delivers package to USPS for the “last mile” delivery to a residential address
- ✓ UPS and USPS share the revenue

Results

- ✓ Increased market share and revenue
- ✓ Lower cost from optimized distribution efficiency
- ✓ Lower delivery charges for customers
- ✓ Improved customer service
- ✓ Sustainability and lower CO₂ emissions

Coopetition - MedUnite



Strategic alliances in the healthcare industry

- Increasing healthcare costs
- Continued pressure on managed care operating margins
- HIPAA law requires health insurers and providers to comply with standards for transmitting claims that ensures the privacy and security of sensitive patient data

Scope

- Develop an efficient internet-based connectivity system for the secure transmission of sensitive patient data

Results

- The system enables healthcare constituents (physicians and health plans) to handle administrative transactions more effectively.
- Saves billions of dollars of annual healthcare costs

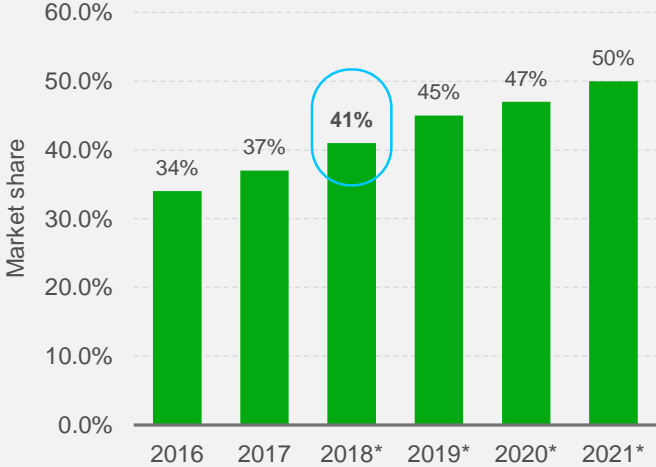
Coopetition for the Ecommerce Shipping Problem

Amazon is already making up most of the US ecommerce sales...

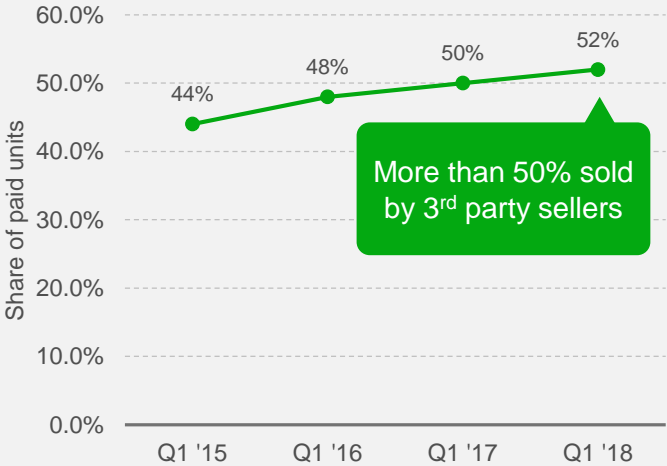
... however they rely heavily on 3rd party sellers...

... which experience major pain related to shipping cost & time

Predicted Amazon's share of total ecommerce GMV



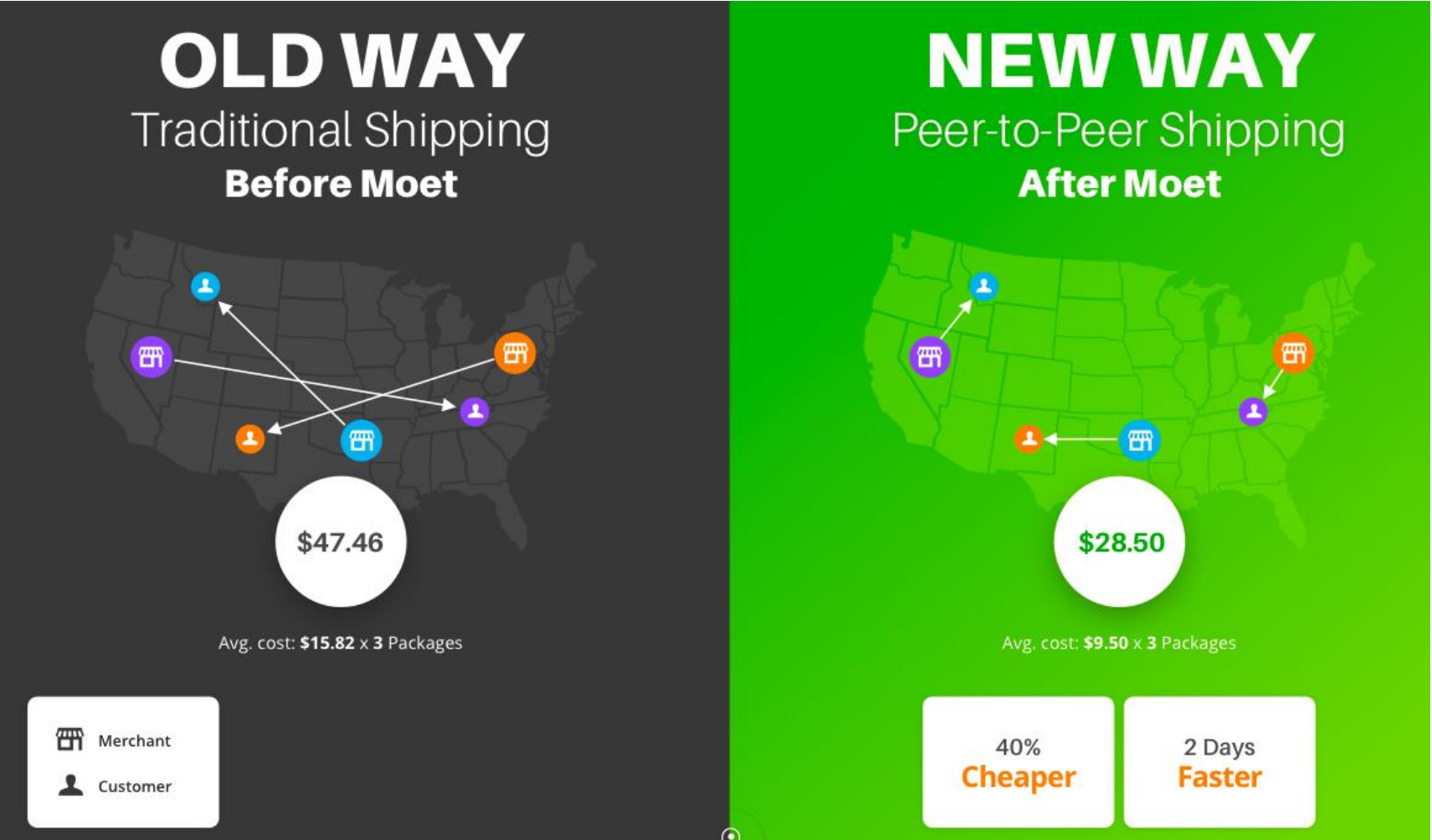
% units sold by 3rd party sellers



- Fast shipping is the **expectation**
- Fast shipping is **expensive**
 - Sellers often limit fast shipping to very small items or to local addresses, which **limits buy box opportunities**

Sellers need a solution that can help get their products seen and reduce shipping costs

Say Hello to Cheaper, Faster and Smarter Shipping



Peer-to-Peer Shipping: A Game-Changer for Online Retailers

Gain Resource Efficiency



Grow Current Markets

Fast and Free Shipping is a major pain point for Sellers

- Fast shipping is the **expectation**
- Fast shipping is **expensive**
 - Sellers often limit expedited shipping to few items or to local addresses, which **limits Amazon buy box opportunities**

Value Proposition

- Sellers work together to ship orders for one another
- The seller closer to any given customer ships to that customer
- No compromise to carrier preference or negotiated rates

Results

- Gets it there quicker (**2 days faster**)
- Gets it there cheaper (**up to 40% less shipping costs**)
- Less carbon footprint (**better for the planet**)



Please let us know if you have any questions.

Thank You!

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