



OMIDYAR NETWORK INDIA

**Investment
firm** focussed
on social
impact

**Equity
investments
and grants*:**
dual
chequebook

Philanthropic
capital of **Pam
& Pierre
Omidyar,**
founder of
eBay

We invest in
bold entrepreneurs
who help create
a **meaningful life**
for **every Indian**

Our investments | Since 2008

\$322m
invested

128
active
investments

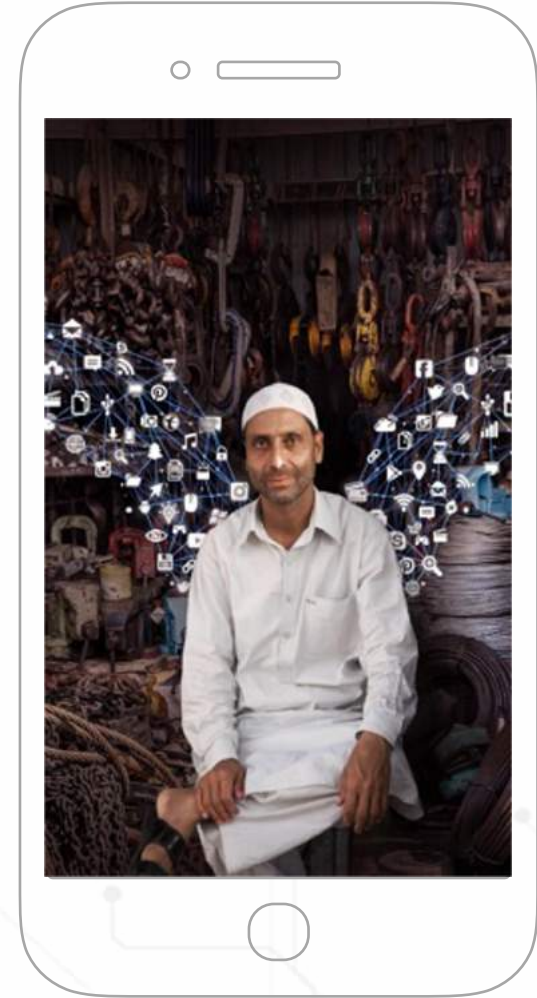
~559m
cumulative
reach*

Aim to invest another \$350m over the next five years

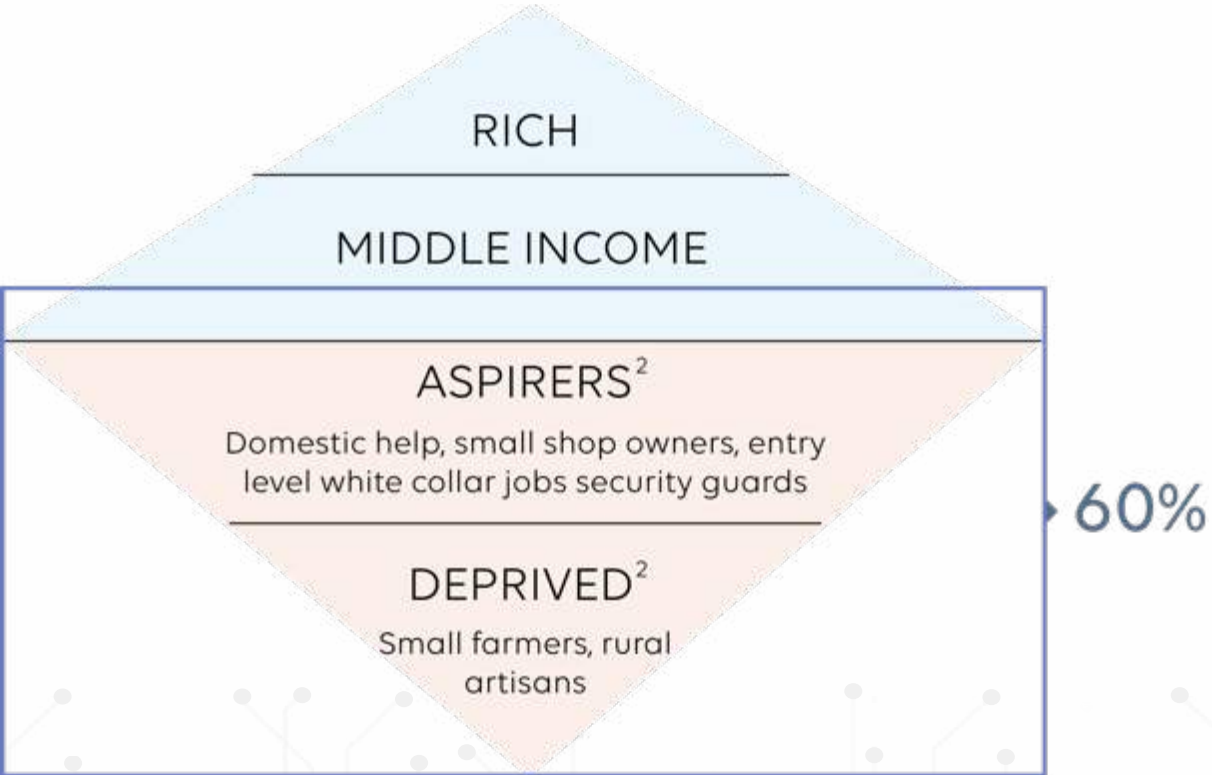
*Figures as on 31st December 2020 *May include duplication of customers*

In service of the Next Half Billion

500 million people expected to come online for the first time by 2022 via their mobile phones

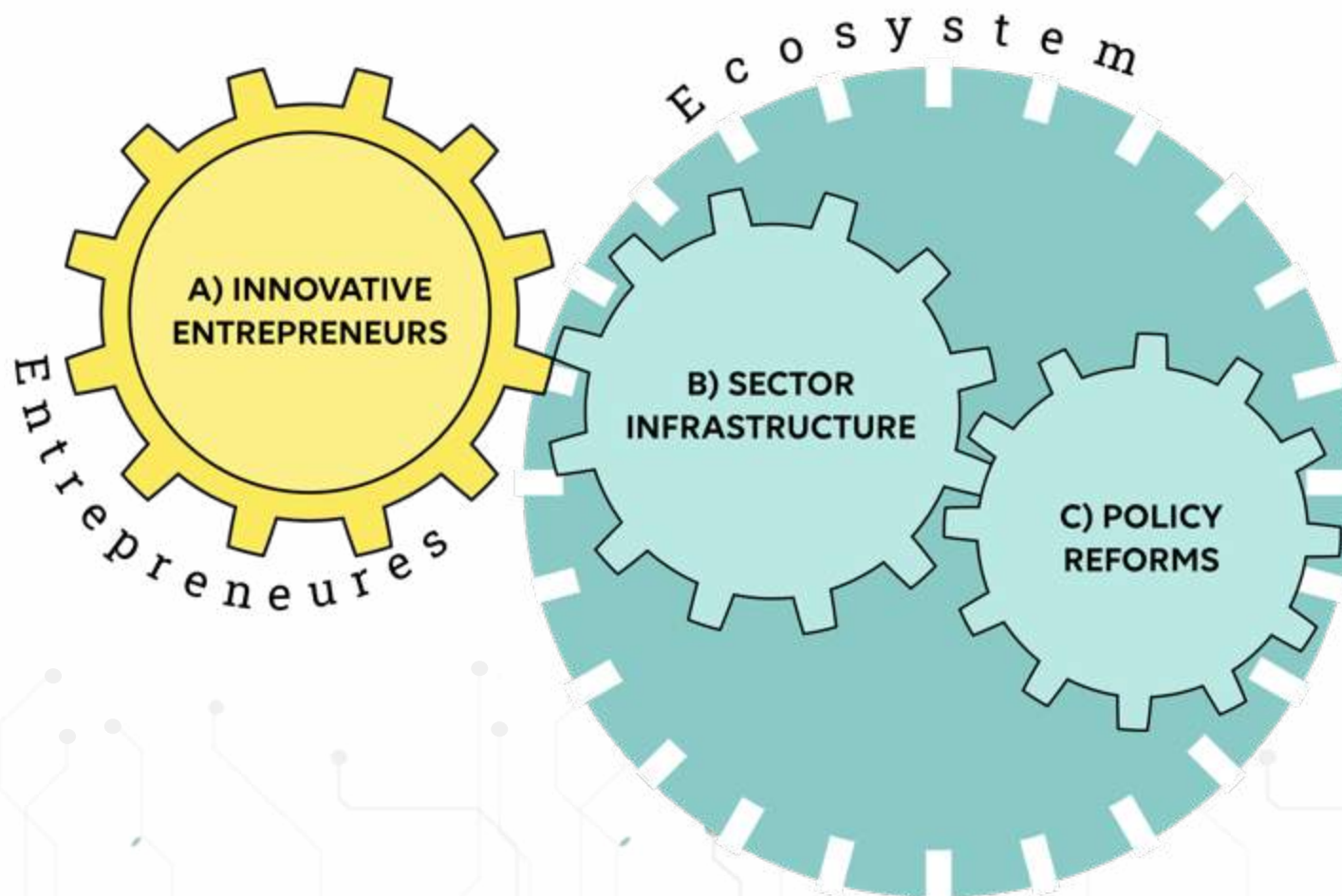


The Next Half Billion | Profile









The 'Dual Chequebook' approach | Accelerating impact

FIGURE 3



The 'Dual Chequebook' approach | In Action

	A) Innovative Entrepreneurs	B) Sector Infrastructure	C) Policy Reforms
For Profit	 Live online tutoring classes	 Instrumental in setting up PM-WANI Initiative	 Contributed to developing e-pharmacy policy
Non-Profit	 Incubation Program for non-profit Start-Ups	 Platform for ULBs to build online citizen centric systems	 Property Rights Research Consortium Working with governments to create data focused policy

Our investment approach | Goodtech: हर ज़िन्दगी बेहतर

Tech for good
access to
aspirational
services,
employment
and productivity

Responsible tech
to minimise harms
of tech

Acknowledging the role of non-tech solutions in driving impact

Examples of our portfolio | Serving the Next Half Billion⁺



Digital Identity



Education



Emerging Tech



Financial Inclusion



Governance and Citizen Engagement



Property Rights



Our Portfolio



Our portfolio | Serving the Next Half Billion

- ▶ 1MG
- ▶ 21N78E (Reclaim Your Privacy)
- ▶ Aapti Institute
- ▶ Association for Democratic Reforms (ADR)
- ▶ AffordPlan
- ▶ Agni
- ▶ Akshara Foundation
- ▶ Anudip Foundation for Social Welfare
- ▶ Arrka
- ▶ Ashoka
- ▶ Ashoka University
- ▶ Aspiring Minds
- ▶ Axio Biosolutions
- ▶ Better than Cash Alliance
- ▶ Big FM
- ▶ Bijak
- ▶ BlackBoard Radio
- ▶ Bonfleet
- ▶ BRAC HRLS
- ▶ Bridgespan Group
- ▶ CAM Tech
- ▶ Centre for Budget and Governance Accountability (CBGA)
- ▶ Centre for Digital Financial Inclusion (CDFI)
- ▶ Centa
- ▶ Charities Aid Foundation India
- ▶ Centre for Internet and Society (CIS)
- ▶ Collective Good Foundation
- ▶ Centre for Policy Research (CPR)
- ▶ Credenc
- ▶ CredR
- ▶ CSEP Research Foundation
- ▶ Dasra
- ▶ DealShare
- ▶ Doubtnut
- ▶ DrinkPrime
- ▶ Data Security Society of India (DSCI)
- ▶ Dvara Research
- ▶ eGovernments Foundation
- ▶ EnglishHelper
- ▶ Foundation for Ecological Society (FES)
- ▶ GiveIndia
- ▶ Gram Factory
- ▶ GramCover
- ▶ Harvard University | IIT South Asia Initiative
- ▶ Hasgeek
- ▶ Healofy
- ▶ Healthkart
- ▶ I2e1
- ▶ IDFC Foundation
- ▶ IFC
- ▶ iMerit
- ▶ Institute for Financial Management and Research (IFMR) Finance Foundation
- ▶ Impact Investors Council (IIC)
- ▶ Indian Express
- ▶ Indian Institute of Human Settlements (IIHS)
- ▶ Indian Institute of Science (IISc)
- ▶ Indian Institute of Technology Delhi
- ▶ Indian School of Development Management
- ▶ Indian School of Business
- ▶ Indifi
- ▶ IndusOS
- ▶ Intellegrow
- ▶ Indian Urban Space Foundation (IUSF)
- ▶ J-Pal
- ▶ Jan Sahas
- ▶ Janaagraha
- ▶ Junior Achievement India Services



Our portfolio | Serving the Next Half Billion

- ▶ Kaleidofin
- ▶ Krishify
- ▶ Kutuki
- ▶ Landesa
- ▶ Masai School
- ▶ MetroBikes (Bounce)
- ▶ Modular Open Source Identity Platforms (MOSIP)
- ▶ Ministry of Skill Development and Entrepreneurship (MSDE), E&Y
- ▶ MXV Consulting
- ▶ MyShubhLife
- ▶ MyUpchar
- ▶ N/Core
- ▶ Neogrowth
- ▶ Newslaundry
- ▶ NextGen
- ▶ National Foundation of India (NFI)
- ▶ National Institute of Public Finance and Policy (NIPFP)
- ▶ NITI Aayog
- ▶ National Law School India University, Bangalore (NLSIU)
- ▶ National Law University, Delhi
- ▶ NowFloats
- ▶ Overcart
- ▶ Pickrr
- ▶ Place Fund
- ▶ PRADAN
- ▶ Pratham USA
- ▶ Pratilipi
- ▶ Praxis Global Alliance
- ▶ Property Rights Research Consortium (PRRC)
- ▶ Quikr
- ▶ RailYatri.in
- ▶ Riskcovry
- ▶ Samagra
- ▶ Sattva
- ▶ Scripbox
- ▶ Scroll
- ▶ SEWA Grih Rin (Sitara)
- ▶ Sir Ratan Tata Trust
- ▶ Sparshik
- ▶ Swarna Pragati
- ▶ Tata Trusts
- ▶ Teach For India
- ▶ The Ken
- ▶ Toffee
- ▶ The Quantum Hub
- ▶ Transerve
- ▶ Treehouse
- ▶ U2Opia
- ▶ University of Chicago
- ▶ Uolo
- ▶ Varthana
- ▶ Vedantu
- ▶ Ver Se
- ▶ Villgro Innovations Foundation
- ▶ Village Capital
- ▶ Vistaar
- ▶ Vyng
- ▶ WhiteHat Jr.
- ▶ World Bank
- ▶ World Resources Institute
- ▶ YAP
- ▶ Yelo (0.5 BN.)
- ▶ ZestMoney
- ▶ Zimmer
- ▶ ZipGo








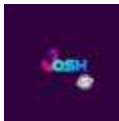



The Next Half Billion

The barriers the NHB face along their digital journey





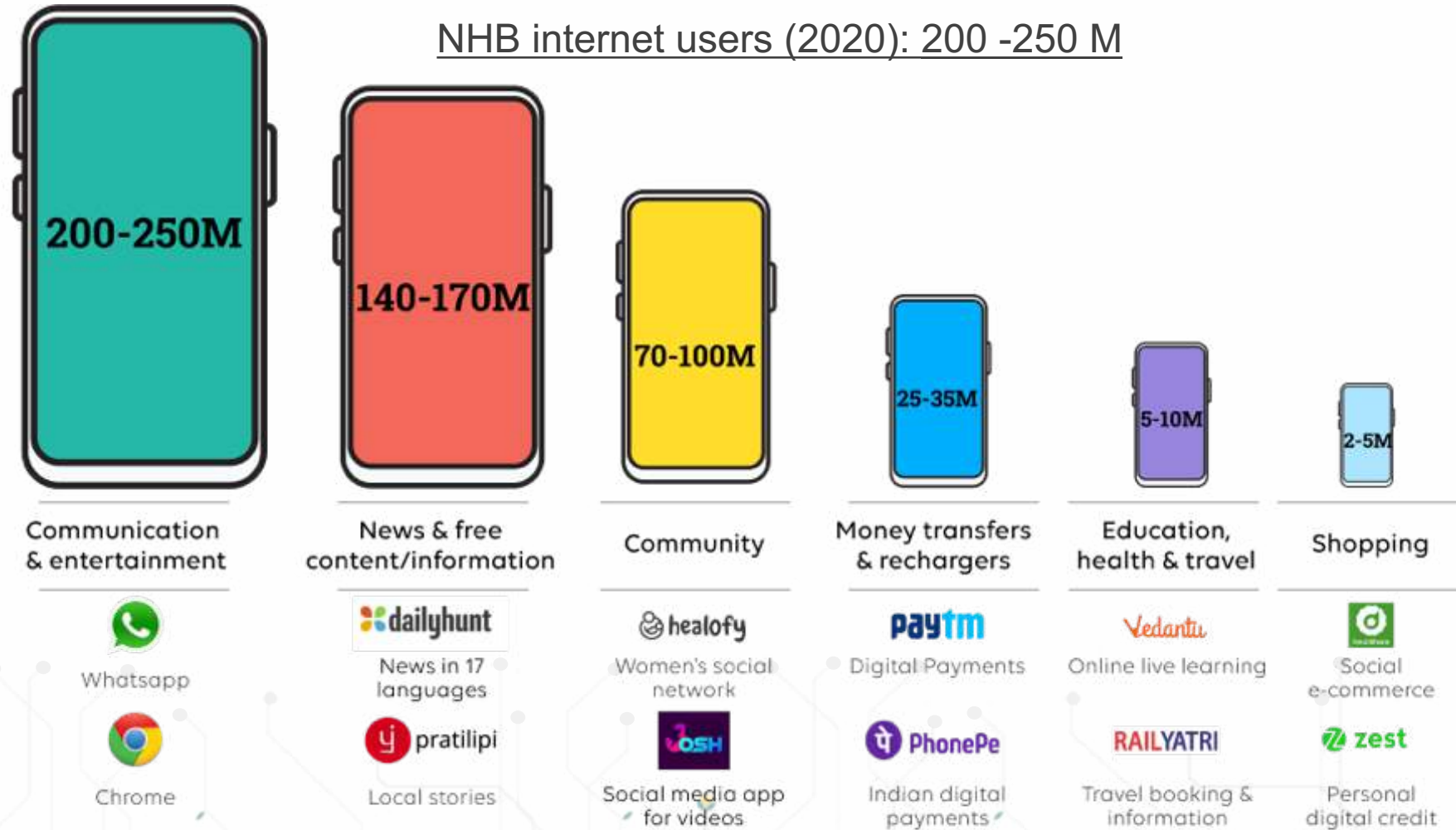
... and our entrepreneurs work to address these 7 barriers

1	Social and cultural context	 Indian mobile operating system	 Railway booking and information app
2	Lack of local language content	 Read, write, and share stories in 10 languages	 News publisher and aggregator in 14 languages
3	Low rates of women’s engagement	 Pregnancy and Parenting Platform for Indian Moms	 Digital savings platform
4	Low confidence in online transactions	 Social e-commerce platform designed for the NHB	
5	Lack of locally relevant apps for social/communication purposes	 Short Form Video Content	
6	Access to data still not affordable to all	 Wi-fi management	
7	Limited focus on extreme affordability	 Interactive online tutoring platform	 eHealthcare

The NHB's digital adoption journey | multi-step journey to transacting online

Indian internet users (2020): ≈700 M




NHB internet users (2020): 200 -250 M

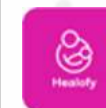


Note: User numbers are cumulative. All subsets of the graph are a subset of the preceding segments. Numbers estimated based of users figures for market leaders in each segment. Shopping users includes both NHB and buyers.
Source: 'India's Digital Future'- KPMG, 'Unlocking Digital for Bharat' (Bain, Google, and ONI, 2018) TechCrunch(2019), Livemint (2019), App Annie user data literature search, ONI analysis.



Innovating for the Next Half Billion

	<p>Adapt to social and cultural context</p> <ul style="list-style-type: none">• Relatable symbols: trolley for checkout, floppy disk for save are unfamiliar• Relevant language: 'checkout' does not reflect their shopping experience• Inclusive UX: logging in with mobile phone over email ID
	<p>Support local language content since 70% of Indians consider it more reliable</p> <ul style="list-style-type: none">• Support entrepreneurs who create Indian language content
	<p>Enable women's participation since women are 36% less likely to own a mobile</p> <ul style="list-style-type: none">• Change perception that smartphones expose them to negative influences• Reposition use of mobile internet toward socially acceptable use cases





Innovating for the Next Half Billion



Build confidence to transact online

- Support through onboarding and early use
- Instant confirmations of customer activity and transaction status



Design for extreme affordability

- Pilot lean models; learn and adapt quickly; expand scale



Social
e-commerce

 affordplan

 doubt nut
पढ़ना हुआ आसान

Innovating for the Next Half Billion



Ensure cost-effective access to data

- Support and leverage shared infrastructure, such as Railway WiFi
- Account for shared use of internet, such as hotspots



Support local apps for social/ communication purposes as it is an early use case

- Invest in local innovators democratizing social media





OMIDYAR NETWORK INDIA



OMIDYAR NETWORK INDIA