ONDC's goal is to dramatically **increase eCommerce penetration**

Significant part of retail sector is not digitally enabled
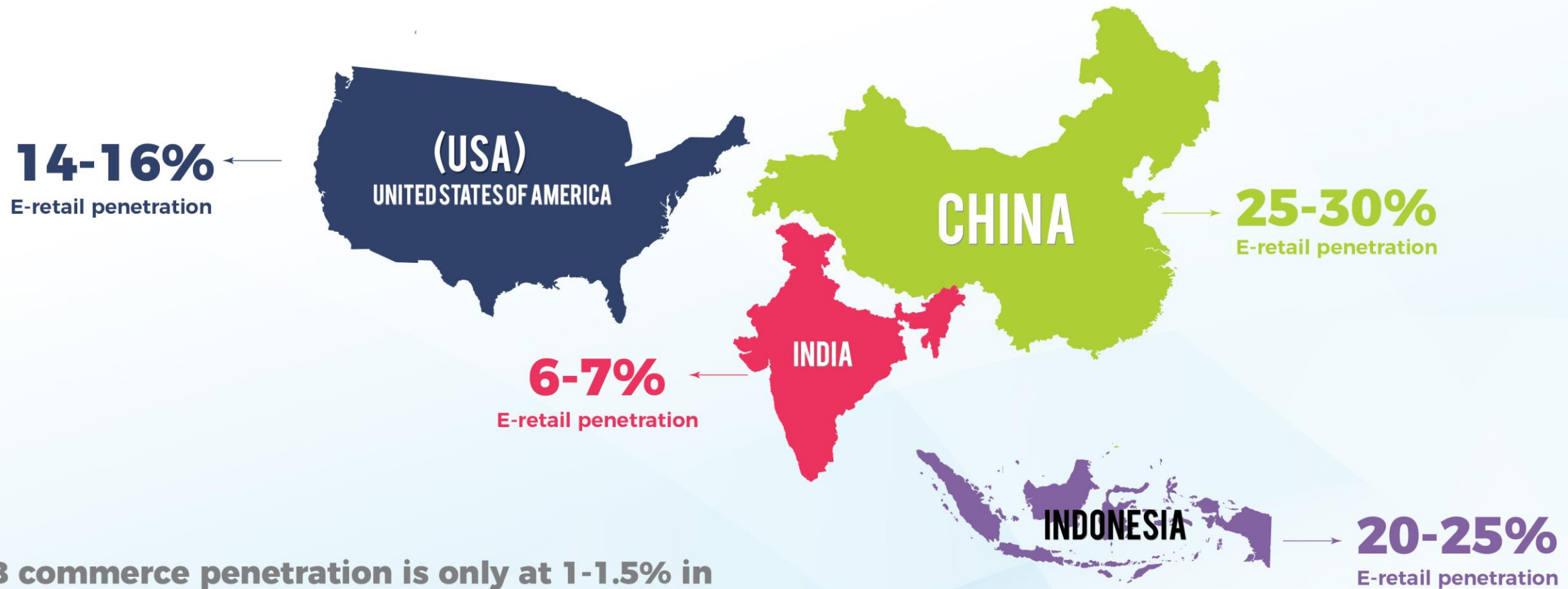
Total Kirana stores in India[1] 12Mn

E-commerce enabled 15,000[2] (0.125%)

Sources:

1. Financial Express Article   2. Economic Times Article   3. UNCTAD Report   4. MapsofIndia Business Article   5. Livemint coverage on online retail (July'21)   6. ONDC - McKinsey Joint Industry Report: Democratising Digital Commerce in India

Total E-retail penetration in India stands at only 6-7%, most of it from cities;

14-16%
E-retail penetration

(USA)
UNITED STATES OF AMERICA

CHINA

25-30%
E-retail penetration

INDIA

6-7%
E-retail penetration

INDONESIA

20-25%
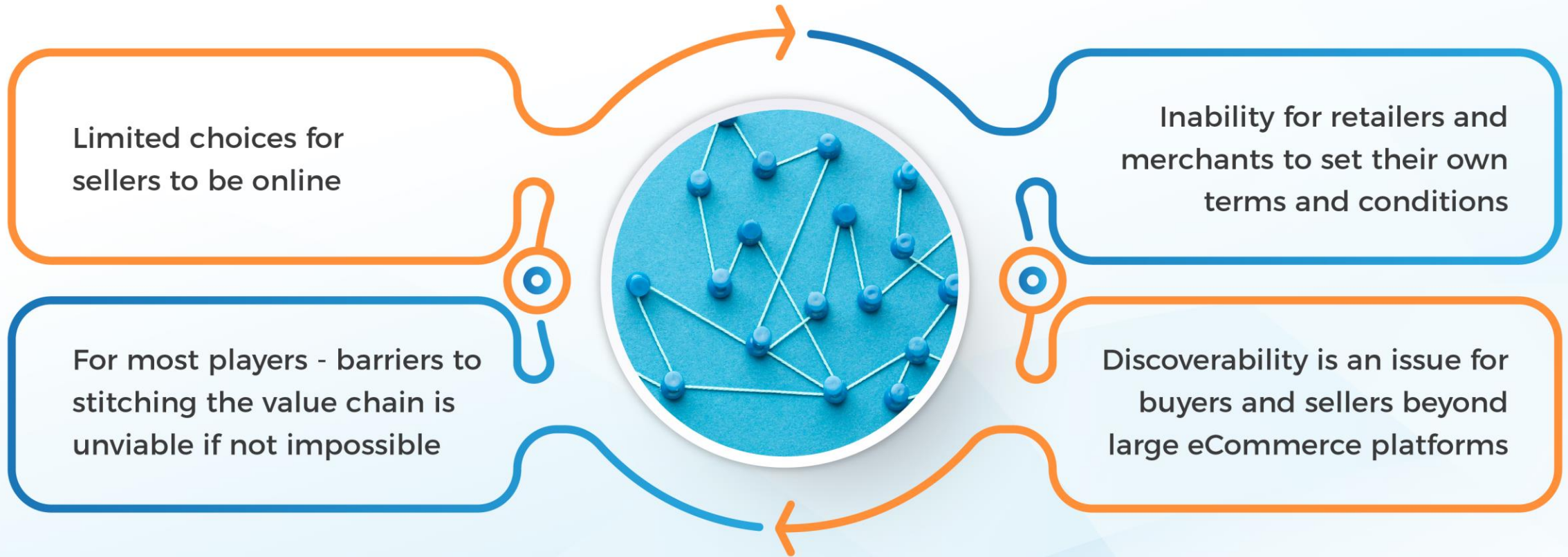E-retail penetration

B2B commerce penetration is only at 1-1.5% in India; well below global average of 20%

Sources:
1. Financial Express Article   2. Economic Times Article   3. UNCTAD Report   4. MapsofIndia Business Article   5. Livemint coverage on online retail (July'21)   6. ONDC - McKinsey Joint Industry Report: Democratising Digital Commerce in India

ONDC has been designed to solve key factors across the value chain holding back participation

Limited choices for sellers to be online

For most players - barriers to stitching the value chain is unviable if not impossible

Inability for retailers and merchants to set their own terms and conditions

Discoverability is an issue for buyers and sellers beyond large eCommerce platforms

The existing mobility ecosystem isn't favourable to Supply Providers

High commission structure affecting earnings
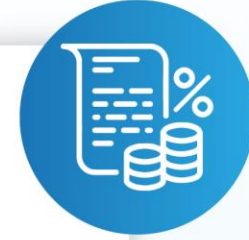
Lesser autonomy with trip information and payment terms leading to mistrust

The existing mobility ecosystem isn't favourable to Citizens/Users

High cost of commute due to higher fares and lack of multi modal options

Unreliable ride experience leading to reduction in patronage

The existing mobility ecosystem isn't favourable to Government

Disconnected public transportation ecosystem causing less than desired asset utilisation

More vehicles on the road means more traffic and pollution

The ONDC design revolves around 2 interrelated principles

UNBUNDLING
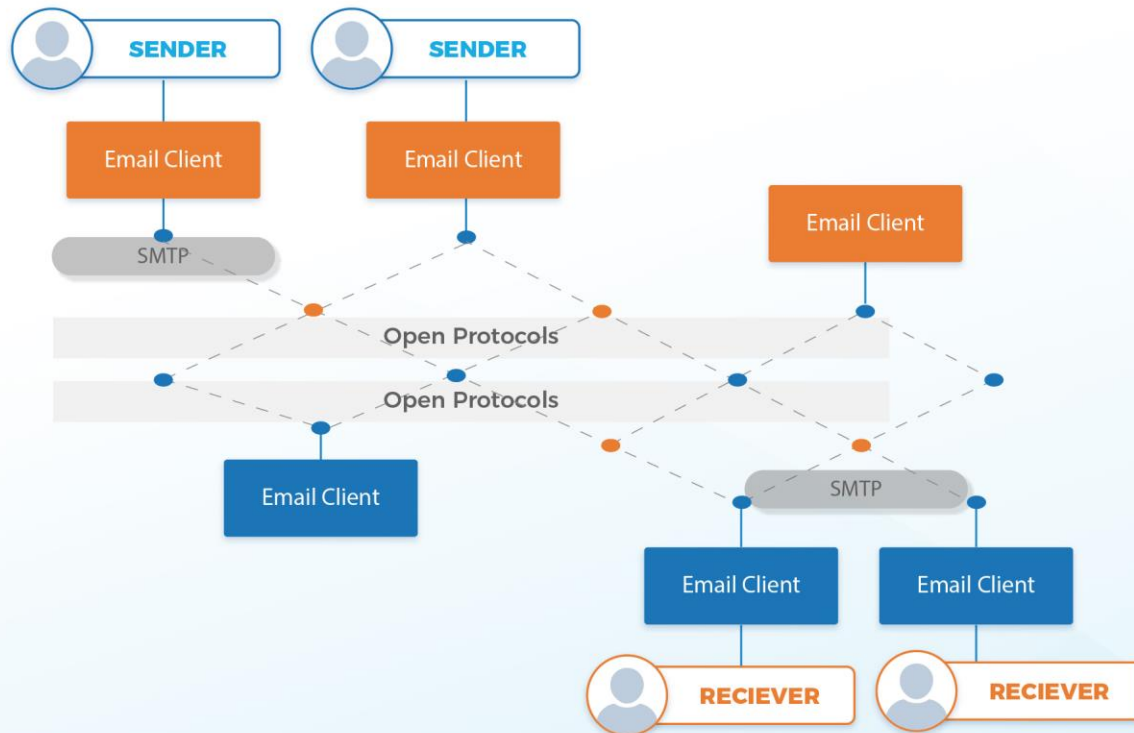of customer & seller acquisition to reduce Go-to-market efforts

+

INTEROPERABILITY
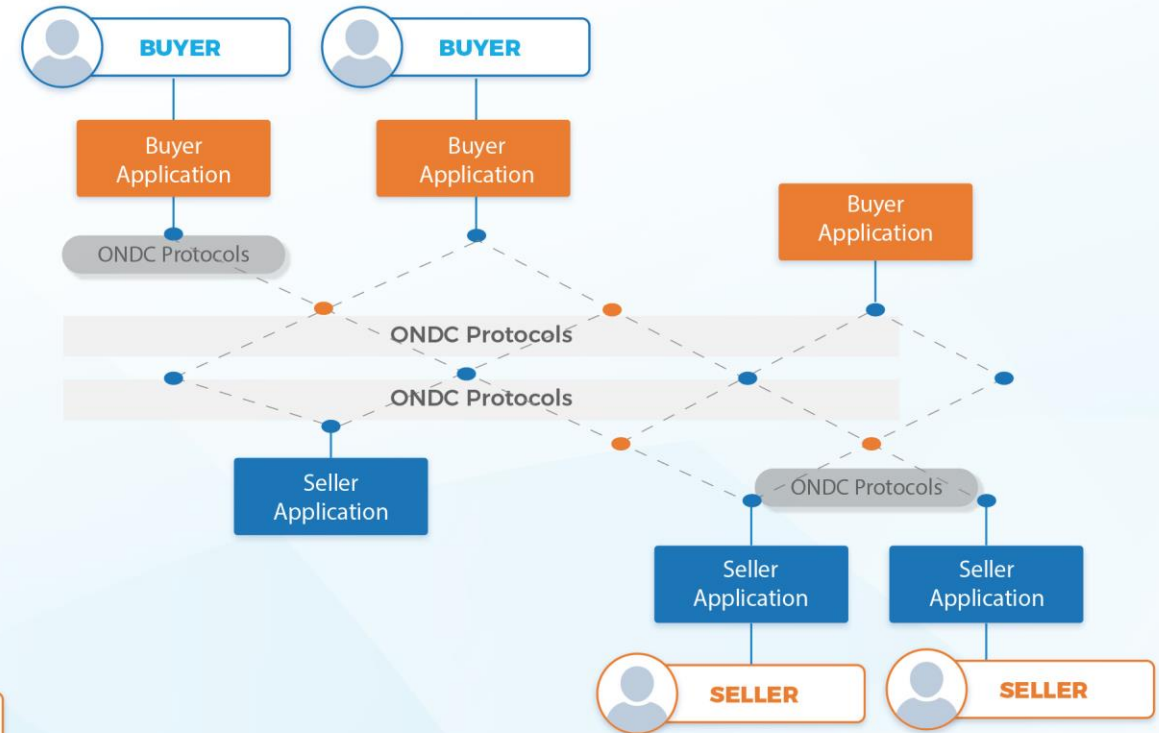between platforms/ applications for greater market access

Built on ONDC Protocols that facilitates commerce aware communication between unconnected entities
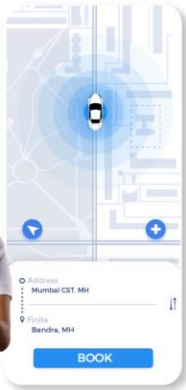

Open Protocol Email System

Open Protocol Digital Commerce

Open interoperable Made-in-India specifications
Inspired by Beckn Protocol [https://becknprotocol.io/]

Today, Riders need to register on multiple platforms to connect with multiple transport providers

Platform 1

Input pickup and drop off

Select product (price)

Payments and Rating

Proprietary protocols

Access to Dispatches

Confirmation and Navigation

Payments and Rating

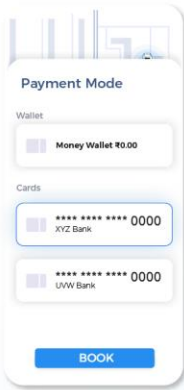## Platform 2

Input pickup and drop off
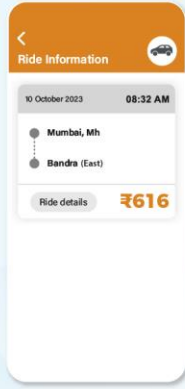
Select product (price)
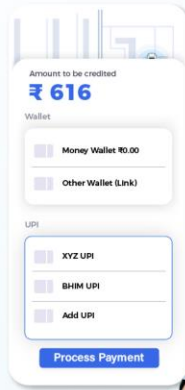
Payments and Rating

Proprietary protocols

Access to Dispatches

Confirmation and Navigation

Payments and Rating
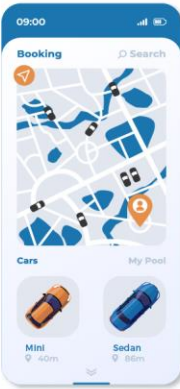
With ONDC, all riders, transport providers can interact with each other so everyone needs to register only once!

After ONDC

Input pickup and drop off

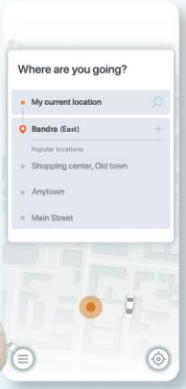Select product (price)

Payments and Rating

Open protocols
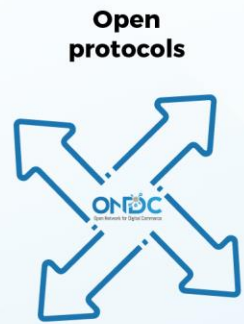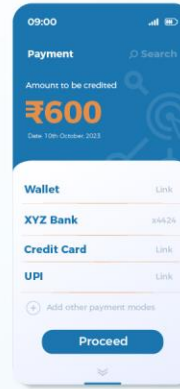
Access to Dispatches

Confirmation and Navigation

Payments and Rating

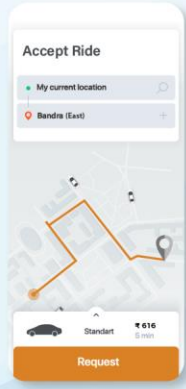Input pickup and drop off
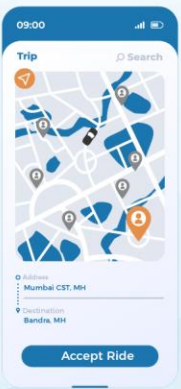
Select product (price)
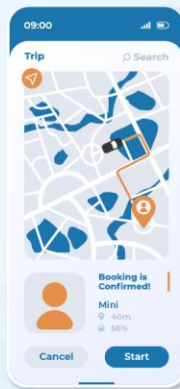
Payments and Rating
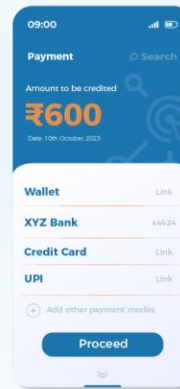
Access to Dispatches

Confirmation and Navigation

Payments and Rating

Enhancing value across both sides of the **marketplace**

ONDC Network — Seller Apps

Taxi	3W	E-Rickshaw
Inter City Bus	Inter city Taxi	Docked Scooter
Intra City Bus	Metro/Rail	Ferry /Waterway

Customized technology to support supply providers by offering lower cost structure for digitization and higher earning potential

ONDC NETWORK

ONDC Network — Buyer Apps

Mobility Apps	Travel Apps
Payments Apps	E-Commerce
Messaging Apps	Bank Apps

Customised technology that offers higher convenience, savings and thereby accelerates the adoption of smart, shared and sustainable mobility

Establishing a win-win-win scenario for Supply Providers

Higher Revenue

Optimised Resource Allocation

Data - Based Trip Planning

Establishing a win-win-win scenario for Citizens

Convenience and Savings

Boost in Productivity

Improved Well Being

Establishing a win-win-win scenario for Government

Inclusive Economic Growth

Environmental Protection

Thriving citizen community

IMPACT SO FAR - 1.3 LAKH DRIVERS, 1.5 CRORE TRIPS, 233 CRORE LIFETIME EARNINGS

Kolkata

Yatri Sathi

Operated by
WB IT & E Ministry

Mysore
Bengaluru

namma
yatri

Kochi — yatri

4 Cities

1.35 LAKH	32 LAKH
REG DRIVERS	TOTAL RIDERS
1.5 CRORE	233 CRORE
LIFETIME TRIPS	LIFETIME EARNINGS

Bus (City/Inter city) Value Proposition

Buyer Value Proposition

Digital ticketing

Multi modal enabled

Seller Value Proposition

Higher revenue with access to demand from diverse buyer applications

Digitally enabled fleet and access to actionable data

Metro Value Proposition

Buyer Value Proposition

Convenience of digital ticketing

Multi modal enabled

Seller Value Proposition

Higher revenue with access to demand from diverse buyer applications

A complete mobility, transportation and travel **ecosystem**

Family Vacation Itinerary

📍 Shimla

- 🎟️ Bus ticket
- 🛏️ Hotel accomodation
- 🚕 Travel to bus station
- 🚕 Travel from bus station to hotel
- 📷 Sightseeing

A complete mobility, transportation and travel ecosystem

Today's Solution

Search... 🔍

redBus
https://m.redbus.in › Bus Tickets ›

Chandigarh to Shimla Bus Tickets Booking
Chandigarh to Shimla bus distance is 119 km.

MakemyTrip
https://www.makemytrip.com › Hotels

Online Hotel Booking | Book Cheap, Budget and Luxury...
Now Book Domestic & International Hotels at makemytrip.com.

CabBazar
https://cabbazar.com › city › shimla

Local Taxi Services In Shimla, Book Cab in Shimla
Hire Local taxi in Shimla at best price. Book outstation cabs Shimla.

Justdial
https://www.justdial.com › ... › 21981+ Listings

Top Tour Operators in Shimla
21981 Tour Operators in Shimla. Find Travel Operators,.....

Note: All brand names used are for representative purposes only.

A complete mobility, transportation and travel ecosystem

Yatri - ONDC Buyer App

Chandigarh - Shimla Bus Ticket	✓ Add to cart
Shimla Resort Inn Hotel Resevation	✓ Add to cart
Home - Chandigarh Bus Stop Prebook a taxi	✓ Add to cart
Shimla Bus Stop - Shimla Resort Inn Prebook a taxi	✓ Add to cart
Shimla Holiday Tour Package Pre-planned Holiday package	✓ Add to cart

🛒 5

Demystifying ONDC

✓ ONDC is...

- An open network, capability, infrastructure
- Infinite models, fertile for innovation
- Eliminates need for central intermediary
- Market and Community led initiative

✕ ONDC is NOT

- An application, a platform, a product
- A single model
- A central intermediary
- A regulator

A truly "Made in India" digital revolution for the world

> " ONDC will democratise digital commerce & move it from platform-centric model to an open network model. "

Sh. Piyush Goyal

Hon'ble Union Minister,
Ministry of Commerce & Industry

ONDC Advisory Council
comprising of stalwarts from multiple domains

Nandan Nilekani
Non- Executive Chairman, Infosys

R S Sharma
CEO, National Health Authority

Adil Zainulbhai
Chairperson, Capacity Building Commission

Sanjiv, IRS
Joint Secretary, DPIIT, Ministry of Commerce & Industry

Anurag Jain, IAS
Secretary, MoRTH

Anil Aggarwal, IPS (retd)
Member, Competition Commission of India

Dilip Asbe
MD & CEO, National Payments Corporation India

Suresh Sethi
MD & CEO, Protean eGov Technologies Ltd. (Formerly NSDL eGov Infrastructure Ltd.)

Anjali Bansal
Founder and Chairperson, Avaana Capital

Arvind Gupta
Co-Founder & Head, Digital India Foundation

Kumar Rajagopalan
CEO, Retailers Association of India

Praveen Khandelwal,
Secretary General, CAIT

Jaxay Shah,
Chairman, Quality Council of India

Advisory council to operating company in less than 12 months

Jun 2021 — Advisory council established by DPIIT and leadership team onboarded

Aug 2021 — National roll out plan endorsed by HCIM

Dec 2021 — Integration and Testing of first end-to-end transaction by first cohort

Dec 2021 — ONDC Section 8 company registered

Mar 2022 — Network Go-Live with first cohort participants

Apr 2022 — Alpha Test Transactions begins

Jun 2022 — Expansion of ONDC in other cities and domains

Sept 2022 — Beta Launch of ONDC

Kerala Case Study

First of its kind MoU to unite all modes of transportation with the ONDC protocol

An initiative to bring together stakeholders from Government agencies to private providers to ensure safe and convenient transportation options readily available to all

Kerala Case Study
Open Mobility Network Framework

Buyer App

- Mobility Apps
- Travel Apps
- Payments Apps
- E-Commerce
- Messaging Apps
- Bank Apps

Seller App

- Metro
- Inter City Bus
- Water Metro
- Inter City Taxi
- Intra City Bus
- City Taxi

ONDC NETWORK

yatri — Kerala

LOGOS ARE FOR REPRESENTATIVE PURPOSE ONLY

Impact so Far
KOCHI

7200
Reg Drivers

2.4 Lakh
Registered users

2.5 Lakh
Lifetime Trips

6.1 Crore
Lifetime Earnings

Bengaluru Case Study

Collaboratively Built. Community Driven Growth

Bengaluru Case Study
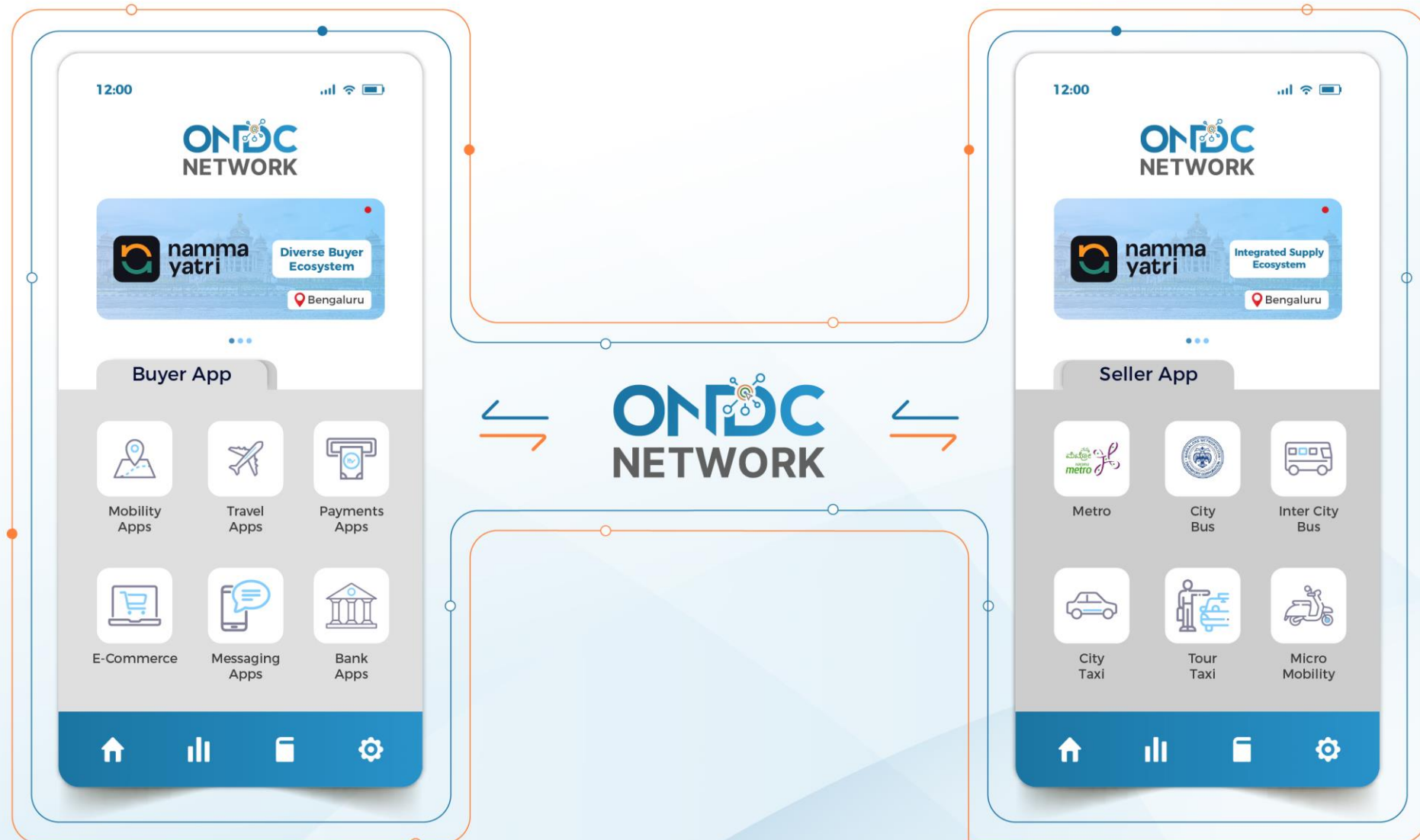
LOGOS ARE FOR REPRESENTATIVE PURPOSE ONLY

Bengaluru Case Study
Content and Community

Performance in 11 Months
Bengaluru

1
Lakh
Reg
Drivers

22
Lakh
Total
Riders

1.4
Crore
Lifetime
Trips

211
Crore
Lifetime
Earnings
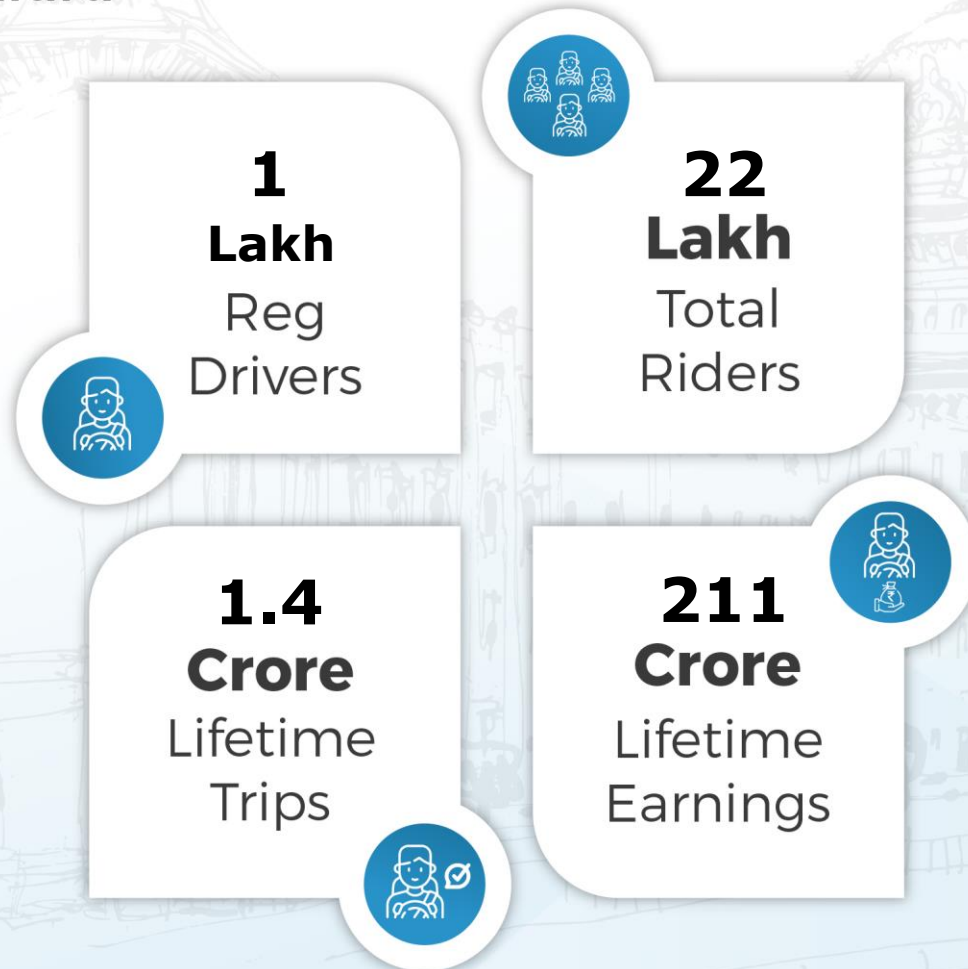
Kolkata Case Study

Kolkata Case Study
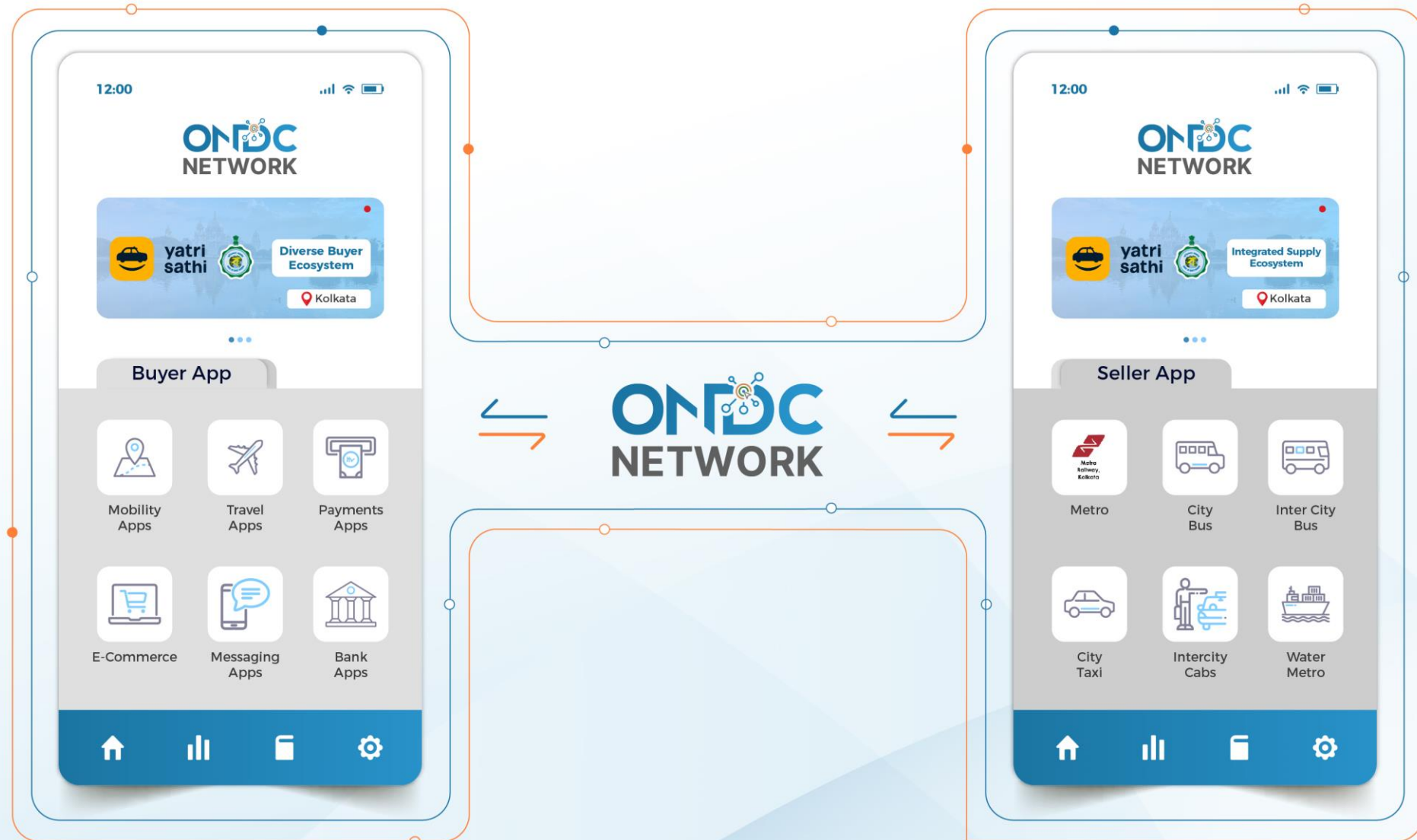
LOGOS ARE FOR REPRESENTATIVE PURPOSE ONLY

Kolkata Case Study
Supply Initiatives

Setting up inclusive onboarding process and consistent engagement initiatives

Taxi Driver onboarding and engagement done by the Kolkata traffic police and civic volunteers

Kolkata Case Study
Democratising access to digitally enabled trips

No Smartphone

Short term - Tab based booking

Long term - Providing smart phones to drivers through partnerships
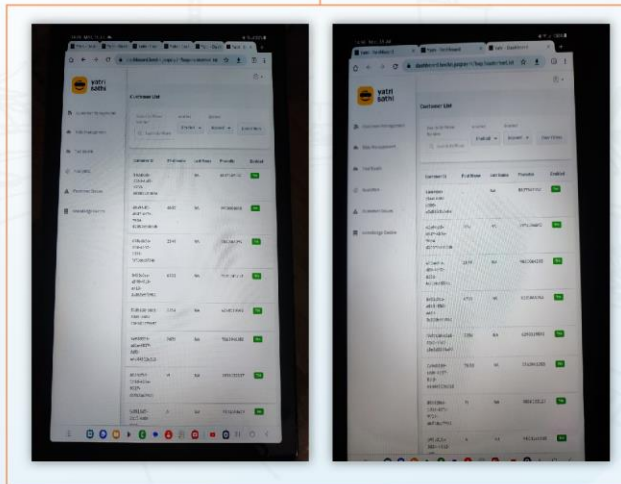
No Bank Account

SBI booth to onboard drivers across all 5 hotspots

No UPI

Collaboration with **PayTM** for creation of accounts

No Connectivity

Dedicated OFC cable line and extra routers to power booth ops

Kolkata Case Study
Demand Initiatives

Prepaid booth branding, vehicle branding and rider education branding done by Kolkata traffic police and civic volunteer community

Key Takeaways and Action Items

Modes

Key Takeaways

Action Items

Autorickshaw and Taxi

- Opportunity to establish local autonomous clusters
- Favourable cost structure

Action: Enable autorickshaw and taxi onboarding activity for ONDC NPs at RTOs

Metro

- Multi Modal enablement
- Increased revenue
- Access to diverse buyer applications

City Bus

- Digital ticketing
- Increased revenue
- Access to diverse buyer applications

Inter City Bus (Govt and Private)

- Digital ticketing
- Increased revenue
- Access to diverse buyer applications
- Chance to provide hotel and F&B services

Waterways and other modes

- Multi Modal enablement
- Increased revenue
- Access to diverse buyer applications

Action: Review ONDC Specifications and initiate technical integration to join the ONDC network

MOBILITY. TRANSPORTATION. TRAVEL

THANK YOU

Unbundled, interoperable Mobility
Journey of Vijay the ONDC way*

Multi-domain Network registry

Infantry Road

Gateway

Seller application

City Taxi

namma metro

namma yatri

BANGALORE METROPOLITAN TRANSPORT CORPORATION

City Bus

- Vijay needs to go from Jayanagar to Infantry Road and logs on to a Buyer Application

- The gateway checks the multi-domain registry and broadcasts Vijay's search to relevant seller nodes

- The gateway then provides the following search results to Vijay:

  - Auto + Metro through Namma Metro seller app- INR 65

  - City taxi ride - INR 300

  - Bus ride from BMTC seller app - INR 45

- Vijay chooses the option to travel by Auto and then use Metro.

- The seller app confirms availability and Vijay makes the payment of INR 65 to receive a ticket/QR that will be valid for both modes.

- Vijay receives vehicle and driver information.

- The auto driver validates the ticket using the seller app and drops Vijay to the Jayanagar metro station.

- Vijay boards the metro and gets his ticket/validated and enjoys his journey to his destination 😊