

Moving the Needle

...the journey from policy to implementation...



December 2023



Dear readers,

In this, the last edition of Moving the Needle in CY2023, we are pleased to feature Mr. Jayesh Ranjan – a 1992 batch IAS officer, who has been involved in policy formulation, as well as attracting new investments in the state of Telangana, over the last few years.

We highlight the current situation in Nepal which is important for India from a geopolitical perspective. This edition also focuses on how logistics and sustainable infrastructure is important for India. It is important to see how India is working towards the same while looking back at the key technology driven initiatives in the country during the year gone by. Integrated theatre commands have been discussed for a while and hopefully things are possibly closer to fruition now than earlier. That being said, the financing of initiatives in India continues to be an important area – be it with respect to climate, or health, or even guidelines for retail lending. Needless to mention that women-led development is now being considered even more, with a sustainable proposition as well.

We hope you find this edition a valuable read, and look forward to your inputs and suggestions.



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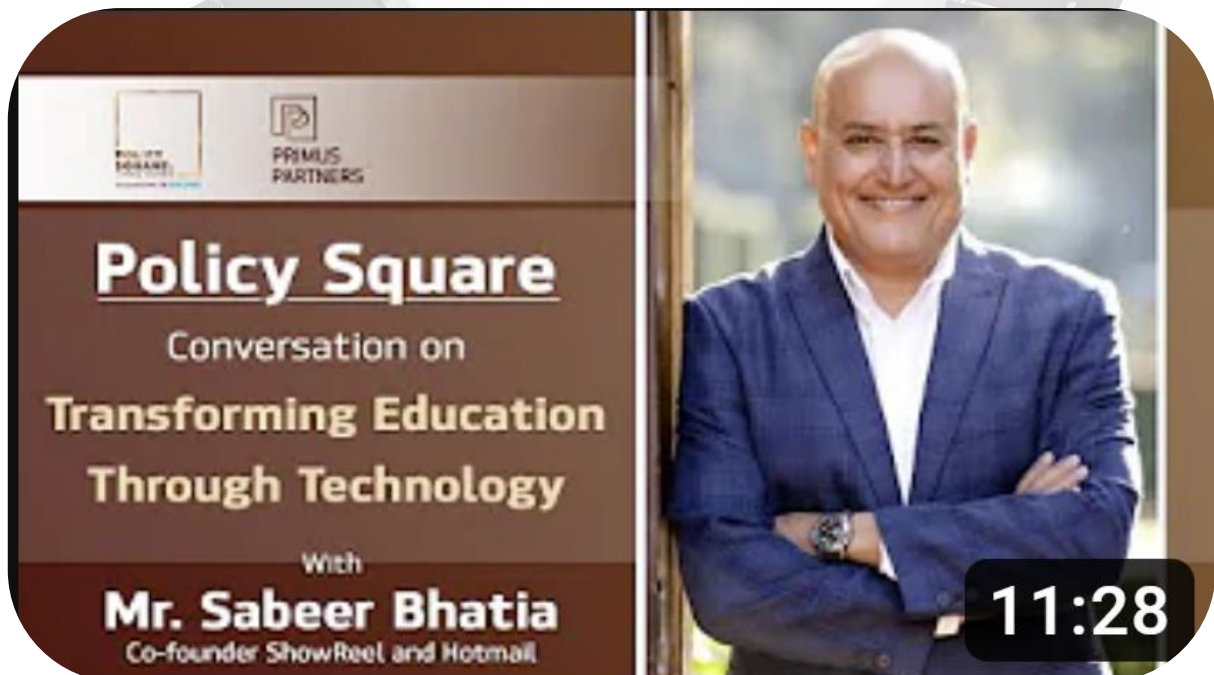
01 – Primus Outreach (an initiative to...)

#PolicySquare	...understand the more fundamental questions in policy making
#LeadersSpotlight	...highlight opinions of sector / segment leaders
#PrimusPodcast	...to bring together policymakers and thinkers in areas of critical importance

Policy Square, Leaders Spotlight and Primus Podcast are initiatives by Primus Partners wherein key constituents of the public policy ecosystem, as well as the sector experts – senior policy-makers, civil society members, business executives etc., – are interviewed on critical issues and policies of national importance to explore their impact on the country and industry at-large.

The motivation for these initiatives series is driven by Primus Partners’ rich policy-sectoral-regulatory knowledge base. This has further been supported by experience of delivering projects across multiple domains and geographies, with an aim to leverage this knowledge, and create a platform to table in-depth discourse.

With this initiative, we have attempted to engage with experts at various levels within the country’s ecosystem. Each expert has brought in a new perspective – all towards enabling India’s growth both in absolute and relative terms.



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02 – Economy

India's Logistics Evolution: Driving Growth and Sustainability Through Infrastructural Advancements

Efficient logistics play a crucial role for businesses and the economy in the country. India's logistics industry has climbed six positions in the Logistics Performance Index (LPI) conducted by the World Bank.

During the year 2022, the Indian logistics market amounted to roughly \$274bn and is projected to grow to \$563bn by 2030, with a 9.4% CAGR. An efficient logistics sector indicates seamless movement of goods and services in and out of a country, fostering swift economic development. Despite this, the nation bears a logistics cost accounting for 14% of its GDP, surpassing the BRICS average of 11%.

solely about development; it's about fostering sustainable growth. While transportation bottlenecks are prevalent, these dedicated corridors aim to enhance efficiency, streamlining productivity and consumption.

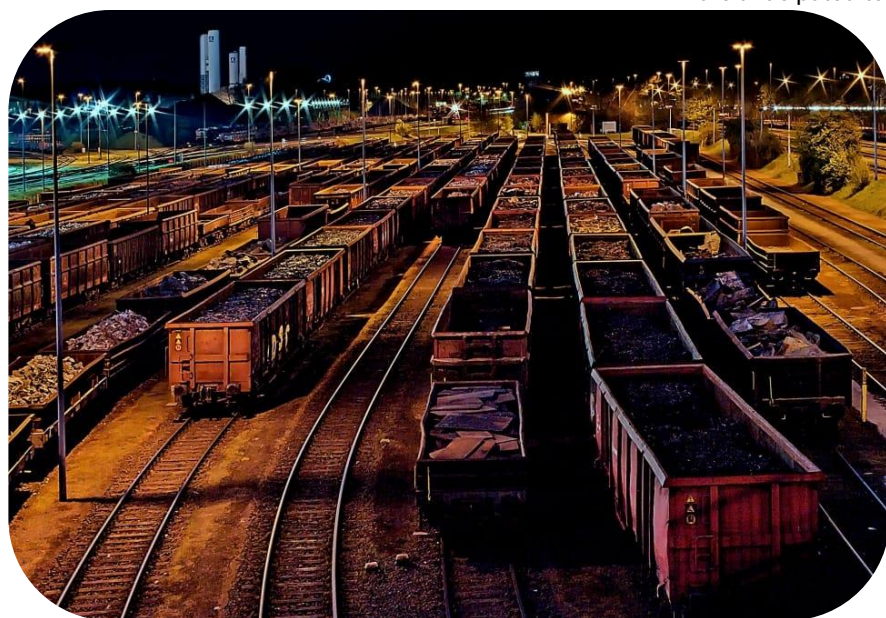
The development of infrastructure will generate employment opportunities, directly and indirectly, through construction, development, and operation. This provides the potential to unleash a host of economic benefits for India, both in the short and long term, such as-

Reducing Logistic cost- The Dedicated Freight Corridors (DFCs) are anticipated to yield substantial economic advantages for

India, mitigating the elevated logistics expenses that have hindered its competitiveness and expansion.

Aligning with Global Standards: The DFCs will also align India with global standards of freight transportation, by increasing the average speed of trains from 25 kmph to 75 kmph, and the maximum speed from 75 kmph to 100 kmph. This enables India to compete with other countries that have advanced rail networks, such as China, Japan and Germany.

Enhancing India's Global Integration: The Dedicated Freight Corridors (DFCs) hold wider ramifications for India's infrastructure landscape, establishing a foundation for a comprehensive multimodal transport network, integrating rail, road, water, and air transportation.

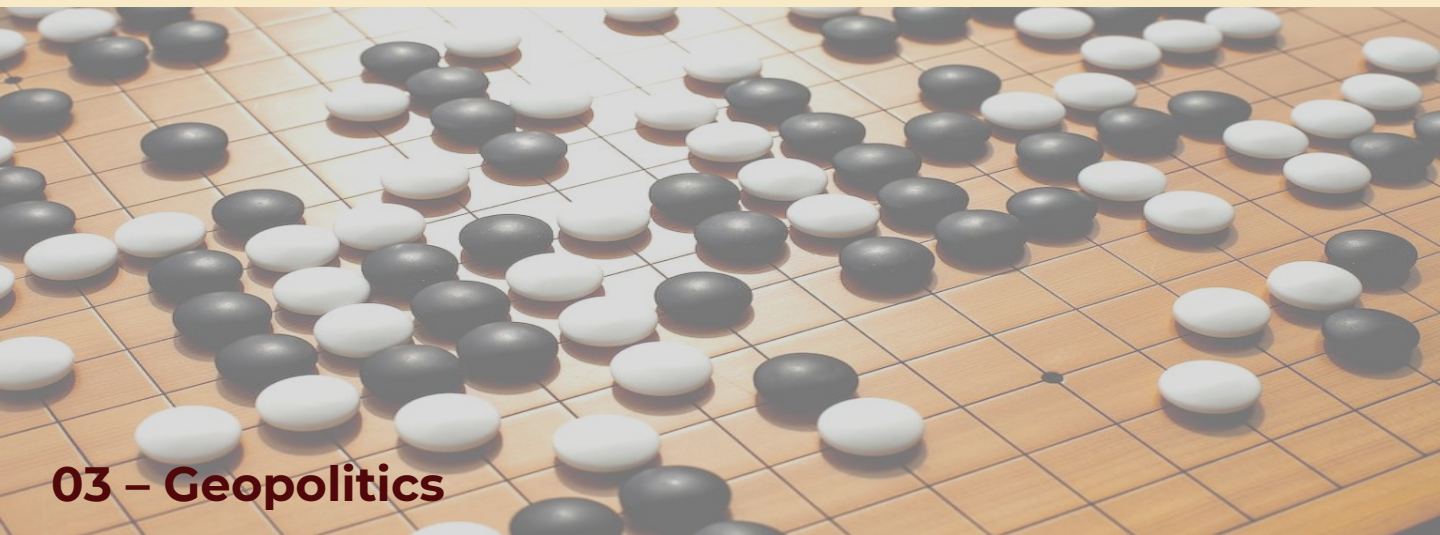


India's infrastructural journey has witnessed significant progress and transformative changes over the years, driven by various developmental initiatives and policy reforms. The Dedicated Freight Corridor project of the Government of India is a high-speed, high-capacity rail corridors that will exclusively carry freight trains, connecting major industrial hubs and ports across the country.

Together, the Eastern Dedicated Freight Corridor (EDFC) and the Western Dedicated Freight Corridor (WDFC), will span over 3,300 km and will have a capacity to carry up to 13,000 tonnes of cargo per train. This is a progressive step by the Government as growth in infrastructural projects is not just

Moreover, beyond fortifying domestic logistics, they foster India's global integration by interlinking with international routes like the International North-South Transport Corridor (INSTC), the Trans-Asian Railway (TAR), and the Chabahar Port. These corridors hold the potential to amplify India's international trade and economic relations with Asian, European, and African nations.

Moving forward, the authorities will further extend these corridors bringing not only a paradigm shift in rail services but also providing economic and environmental advantages. It's poised to make a deep socio-economic impression by generating employment, reducing regional disparities, and overall improving transportation services encapsulating the DFC's importance.



03 – Geopolitics

Nepal – the need to address challenges

The year 2023 is drawing to a close, but the crises of the world are nowhere nearing an end. The latest case in point in the series of political turmoil in India's neighbourhood is that of Nepal.

Interestingly, the most recent protests in Nepal are not the ones demanding more freedom or rights of expression, but those requesting for the restoration of monarchy. It was not so long ago in 2006, that the people of Nepal rose up in protest against the monarchy and ensured the adoption of democracy in 2008, ending the rule of King Gyanendra.

Fast forward to 2023, Nepali citizens are up in arms once again, requesting for the re-adoption of the monarchical system of governance. What led to this change?

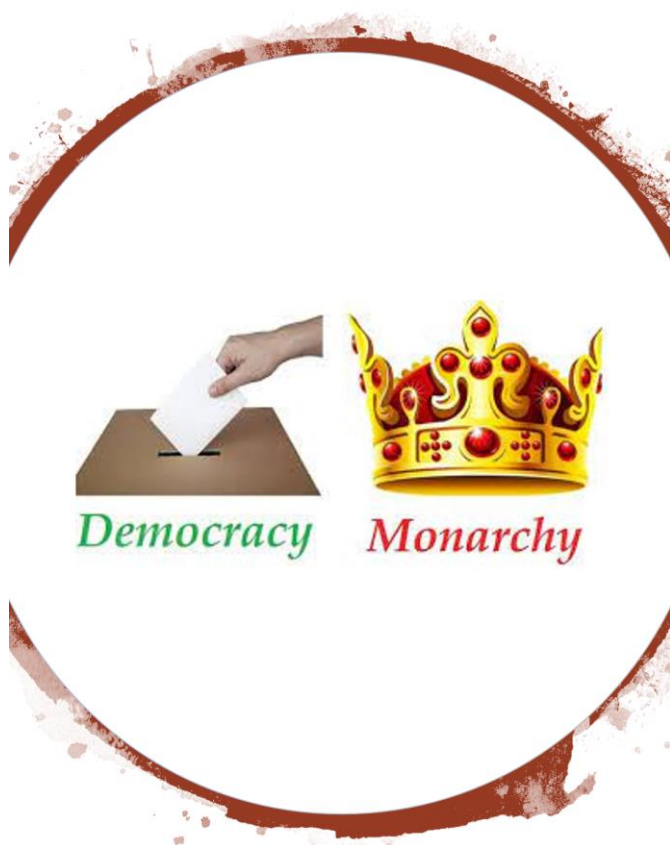
Political instability has been a part of the Himalayan kingdom's destiny given the fact that in the last eight decades, even the forms of government have also changed. In 1951 it was the Rana oligarchy that made way for a multi-party democratic system, followed by the party-less panchayat system of governance, which lasted three decades. The next wave of change brought with it multiparty democracy again, in 1991. The 240-year-old monarchy was then abolished in the year 2006, leading to the adoption of a federal democratic system in 2008.

Between 1959 and now, the country has seen over 40 governments with 41 changes in the Heads of Government/State, owing to frequent inter-party turbulences. The result of such grave political instability has reflected poorly in the development indicators of the Himalayan kingdom, leading it to continue being one of the poorest countries of the region. Inflation rates are one of the highest in the country while unemployment continues to rise.

The lack of opportunities, inadequate infrastructure, and acute shortage of educational and health facilities, have led the youth to flee to countries like Malaysia and South Korea in such of a better life. There is a growing sense of disillusionment amongst the people of Nepal with regards to the political leadership, and their ability to be able to steer the country out of another crisis; especially after the slowdown induced by covid and infrequent natural disasters.

Greater use of social media to percolate the message, demands for restoration of monarchy to ensure political stability, and the right to be governed by an honest and forward-looking government, were reflective of the pensive mood of a fair proportion of the population.

What Nepal needs right now, is not for the civilian forces to suppress these voices, or for the opposition to fuel the fire but for the country to transition towards putting together a system in place which will provide the Nepalis with a credible, capable and charismatic government.





04 – Infrastructure

Sustainable Infrastructure: Integrating Environmental Considerations into India's Growth Strategy

India's growing industrialization and urbanization have made it a major player in the world economy in recent years. Concerns regarding sustainability and climate change have been raised as this prosperity has come at a cost to the environment. In order to balance growth and environmental well-being, sustainable infrastructure integration is essential as India works to preserve its economic momentum.

Beyond conventional development paradigms, sustainable infrastructure emphasizes the integration of eco-friendly activities into the framework of economic growth. This strategy is important because it can both promote long-term economic resilience and reduce the adverse environmental impacts of expansion. It is not only morally right, but also necessary for future generations to prioritize sustainable infrastructure as India stands at a crossroads in its development.

Accelerating India's shift towards sustainable infrastructure involves not only leveraging renewable energy and promoting eco-friendly urban planning, but also drawing inspiration from the successes of other nations in this realm. Gaining insights can be obtained by working with international partners and using best practices from nations with developed green infrastructure. The integration of foreign methods can serve as a catalyst for sustainable growth, encompassing new waste management systems and energy-efficient building designs.

India's road towards sustainable infrastructure can take inspiration by several global success stories. Copenhagen is a prime example of how sustainable urban planning can change a city. The city is a global leader in green living because it has effectively incorporated environmental concerns into the development of its infrastructure. Copenhagen's emphasis on cycling infrastructure is one notable feature. In addition to reducing traffic congestion, the city has encouraged cycling as a healthier and more environmentally friendly form of transportation, by creating a vast network of dedicated bike lanes. Copenhagen has also demonstrated an excellent commitment to renewable energy sources. The city has made significant investments in wind energy, taking advantage of its coastal location to produce clean electricity. India, with its enormous and varied territory,

can learn from Copenhagen's accomplishments in incorporating renewable energy and sustainable transportation into its urban structure.

Although Bhutan is not a typical urban case study, it offers a distinctive illustration of a nation dedicated to carbon-neutral development. Bhutan, a country tucked away in the Eastern Himalayas, has set lofty targets to keep itself carbon neutral and protect its pristine environment. The nation places a high priority on hydroelectric power, using its plentiful water resources to produce clean energy. Bhutan's dedication to preserving more than 70% of its land covered by forests demonstrates its focus on striking a balance between environmental preservation and economic growth. This helps to conserve biodiversity in addition to acting as a carbon sink. With its varied ecosystems and energy requirements, India can learn from Bhutan's commitment to sustainable and peaceful development.

The shift to sustainable infrastructure comes with obstacles, but it also creates new opportunities. Putting money into green technology research and development can lead to a booming industry that supports innovation and creates jobs. Furthermore, the strain on India's domestic resources can be lessened through international cooperation in the form of financial support and knowledge exchange.

In conclusion, India's holistic development requires sustainable infrastructure—it is not just a choice. Achieving a balance between environmental conservation and economic growth is difficult but an attainable objective. India can set an example for a future in which prosperity coexists peacefully with the environment, by utilizing renewable energy, taking inspiration from international best practices, and reducing its environmental impact. The moment to act is now, and the secret to opening India's door to a resilient, inclusive, and environmentally friendly future is the integration of sustainable infrastructure.

Steps are being taken and acted upon. For instance, a proposal is currently being considered whereby sustainability is expected to become a central consideration for debt resolution under the IBC laws in India. This will make India a pioneer in restructuring distressed businesses.

05 – Technology

Recap 2023 - Technology wins for India

Mainstream adoption of 5G: In October 2022, 5G technology services were introduced in India. Over the last 14 months, the government has implemented a number of measures to expedite the nationwide rollout of 5G. The process of SACFA clearance for low power base transceiver stations (BTS) and authorization to use street furniture for small cell and telegraph line installation have been simplified. Moreover, the GatiShakti Sanchar portal has been introduced to facilitate and expedite the Right of Way permissions by offering a unified interface for all stakeholders involved. As per Department of Telecom, India currently has the second largest 5G network in the world, on the back of the fastest 5G rollout with over 3 lakh sites installed in 714 districts, all within a year of launch. According to Speedtest Global Index, India has jumped 15 places in mobile download speeds to 28th globally thanks to the rapid 5G deployment. This places us ahead of developed countries such as Germany, Japan and the UK.

Global leader in Digital Payments: According to a Worldline report, UPI transactions in India surged by 62% in H1 2023 compared to the same period last year, primarily driven by the growth in Person-to-Merchant (P2M) transactions. This year also witnessed an innovation in the UPI payment ecosystem as National Payments Corporation of India (NPCI) collaborated with banks to enable UPI transactions on RuPay Credit Cards. Earlier this year, India initiated its cross-border real-time payments systems connectivity with Singapore, and Sri Lanka signed an agreement in July 2023 to start accepting UPI payments. Currently, the UK, Nepal, Bhutan, Singapore, Australia, Malaysia, Oman and France use UPI for payments. The RBI and NPCI also launched 'UPI One World' in February 2023, allowing inbound foreign nationals from G20 countries to make merchant payments.

AI as a growth enabler: As per a recent Teamlease report, Artificial Intelligence (AI) is expected to add \$967 billion to the Indian economy by 2035, and \$450–500 billion to the country's gross domestic product (GDP) by 2025, accounting for 10% of the \$5 trillion GDP target. India is leveraging AI to improve public service delivery and governance. The Government of India has launched various initiatives to promote R&D in AI, entrepreneurship, and encourage investments in the sector. For example, (i) the National AI Strategy aims to position India as a global leader in AI research, development, and deployment, (ii) Establishment of the National e-Governance

Division of MeitY and NASSCOM, and (iii) Centre for Artificial Intelligence and Robotics (CAIR) which focuses on R&D in cutting-edge technologies like artificial intelligence, robotics, and information and communication security. Key sectors such as healthcare, banking and finance, retail and automotive have also doubled down their investments on AI adoption. For example, AI is already being integrated into diagnostic algorithms for screening of cancer and cardiovascular ailments.



Our Opinion

An Ericsson report suggests that 5G adoption would account for nearly 40 percent of mobile subscriptions in India (500 million) by 2027. Use cases in the 5G-connected future seem limitless – Smart manufacturing in Industry 4.0, expansion of AI, IoT, and edge computing; immersive AR/VR experiences in entertainment, gaming, and industries; doctor-patient interactions in healthcare that go beyond video conferencing; virtual carts in retail stores; and plugging supply chain gaps in logistics and shipping. With support for numerous sensors and real-time data dissemination, we expect 5G to spur the development of Internet of Things (IoT) and Edge ecosystems, smart city functions, e-health, traffic systems, and connected cars in the coming year.

UPI gaining prominence and acceptance globally is a testament to our country's innovation and technological prowess and signals the dawn of India's position as a leader in the digital payment landscape. India's goal of doubling its GDP and having a trillion-dollar digital economy must enable growth for all stakeholders in this ambitious journey, as we step into 2024.

06 – Aerospace and Defence

Integrated Theatre Commands – An Indian Odyssey possibly closer to fruition now than earlier

In the crucible of contemporary security challenges, India is orchestrating a pivotal transformation of its military architecture, with an eye toward fortifying its strategic prowess. A pivotal step in this evolution is the establishment of Integrated Theatre Commands (ITC), heralding an era of harmonized collaboration between all defence forces.

Theatre Commands

A way of organizing and managing military forces within a particular region or theatre of operations, the idea behind the Theatre Command System is to enhance coordination and synergy among the Army, Navy, and Air Force. Currently, almost all major countries including China, Russia, the US, the UK and France work on a theatre command concept.

Background and the Need for ITC:

India's current military framework comprises 19 commands. 17 of them are service-oriented, 7 each for the Army, the Air Force and 3 for the Navy and the 2 tri-service commands-the Andaman and Nicobar Command and the Strategic Forces Command (SFC) overseeing the nation's nuclear arsenal stand as early models of joint operations.

The imperative to consolidate these commands into four or five unified theatres is grounded in the quest for streamlined military operations, heightened coordination, and increased efficiency in the rapidly evolving security landscape. India's diverse geographical challenges, ranging from mountainous terrains to vast maritime expanses, also demand a cohesive military strategy by combining the strengths of each service, ensuring a comprehensive and synchronized defence approach. The rationale extends to fostering better planning, unified military responses, and a unified approach to fighting future threats while having a cost-effective defence strategy.

Steps Taken Towards Theaterization in India:

The Inter-Services Organisations (Command, Control, and Discipline) Bill of 2023 represents a legislative milestone, laying the foundation for a joint services command. Noteworthy initiatives include cross-staffing programs, strategically aligning resources such as UAVs and BrahMos supersonic cruise missiles. The introduction of "common annual confidential reports" for senior generals across the armed forces signifies a concerted effort to synchronize the appraisal system for tri-Service appointments.

Progress in India's Theatre Commands Plans:

A consensus has been achieved among the Indian Army, Navy, and Air Force, marking a watershed moment in the nation's pursuit of integrated theatre commands. The previous proposal of having three integrated theatre commands is being re-evaluated by the DMA headed by the CDS. The proposed three commands are strategically tasked with overseeing the northern borders with China, the western front with Pakistan, and the crucial maritime command in peninsular India. The evolution of these plans involves a pragmatic adjustment, abandoning the concept of a standalone Air Defence Command (ADC). Instead, recognizing the interdependence of 'air defence' and 'offensive air' missions, air assets will seamlessly transition between theatre commands based on operational contingencies.

Way Ahead:

The realization of the full potential of theatre commands hinges on effective reorganisation

- Formulation of a comprehensive national security strategy and the implementation of suitable tri-service structure that breaks down the traditional service silos, and fosters synergy among the three major branches of the military- is crucial for swift decision-making and execution in a dynamic security environment. The optimization of decision-making processes remains pivotal, steering clear of unnecessary bureaucratic hurdles.
- Seamless integration of technological capabilities across services is critical for the modern battlefield. This includes joint planning, intelligence sharing and leveraging technology for enhanced situational awareness.
- Joint exercises and training are integral component for ITC to ensure effective interoperability by not only honing the skills of the armed forces but also fostering mutual understanding between different branches.
- A forward-looking approach is imperative, ensuring that theatre commands are not only adept at addressing current threats but are also future-ready to contend with emerging forms of warfare in domains such as space and cyberspace.

India's stride towards Integrated Theatre Commands epitomizes a visionary shift in military strategy, where strategic synergy takes precedence. The commitment to a unified, coordinated defence apparatus stands as a testament to India's unwavering dedication to national security in the 21st century.



07 – Healthcare

Climate and Health Financing

Climate Change has a cascading effect on human health and health systems. The rising pollution levels in the air, water and soil have long-term or permanent consequences on public health from a very early age. Natural calamities like droughts and floods affect crop production and push borderline populations over the edge, towards food insecurity, leading to malnutrition. The health systems in India, and most of the developing world, are not equipped to handle the increasing burden of diseases unnaturally caused due to Climate Change. With over 60% of the population living in rural and tribal areas, which are heavily dependent on natural resources for survival, Climate Change has a massive impact on India. With the backdrop of COP28 Summit taking place in Dubai, UAE, India's strong commitments towards Net Zero 2070 and integration of Climate Action and One Health in the G20 agenda in India's Presidency, the country is in the spotlight for taking affirmative action towards climate and health challenges.

India needs a climate-resilient health system, which means identification of potential threats and developing prevention and mitigation strategies, development of health infrastructure and operational frameworks, that reduce the burden of the healthcare sector on the environment, investment in development and implementation of the One Health concept, and driving community engagement for climate conscious practices. While there are many policies and initiatives that attempt to address the impending issues of climate change and its impact on public health, the overarching challenge remains to be Climate and Health Financing. Initiatives like National Programme on Climate Change and Human Health and National Action Plan on Climate Change, provide broad areas of intersective strategies, but fail to provide a financial framework to support the implementation of the same.

In order to have a sustainable Financing Framework for Climate and Health action, there needs to be conceptual clarity on what it entails. Climate financing, as defined by the United Nations Framework Convention on Climate Change (UNFCCC), encompasses local, national, or transnational funding from various sources, including public, private, and alternative, to support climate change mitigation and adaptation efforts. The main channels for Climate Finance sourcing are Bilateral collaboration, Multilateral funds, Public and Private funds. India has received upwards of \$1 Billion in Climate Funds from Bilateral and Multilateral sources, which is more than any of the countries in its peer group, however on the basis of the scale of expenditure, it is lagging behind on attracting international funds that meet the requirements.



A meaningful investment in the cross-beneficial interventions is required in the following priority areas-

1. Health impacts due to extreme heat
2. Food Insecurity and consequent malnutrition
3. Infrastructure and workforce disruptions due to extreme climatic incidences

The private sector has a large carbon footprint, but also has an equally large influence on the general public and financial resources to adopt best ecological practices. There is a need to mobilize the private sector to contribute both through operational modifications, and lead public awareness drives to increase on-ground impact of climate and health initiatives.

International partnerships can help in developing global networks to mitigate food shortages in extreme conditions and protect the vulnerable communities. Innovative practices in food production and preservation require investment and promotion.

Considering that globally the health sector contributes about 5% of the carbon emissions, it is also important to invest in the following-

1. Greener biomedical waste management systems
2. Green hospital infrastructure
3. Capacity building of the grassroots workers to promote climate conscious practices in public
4. Integration of technology to reduce the carbon footprint
5. Decarbonization of the supply chain in healthcare

A multilateral effort is essential to develop a holistic co-beneficial financial framework at the nexus of Climate and Health.

08 – Financial Services

RBI's Retail Lending Guidelines: Navigating the Changes and Assessing the Impact

In its continuous efforts to fortify the financial sector, the Reserve Bank of India (RBI) has recently made significant moves, not only tightening norms on consumer lending, but also placing a specific focus on unsecured loans.

The recent regulatory adjustments by the RBI hone in on unsecured loans, signaling the central bank's commitment to enhance the stability and risk resilience of the financial system. Unsecured loans, which lack collateral, have been a focal point for regulators globally as they pose a higher risk compared to secured lending.

Banks and Non-Banking Financial Companies (NBFCs) are now required to increase reserves and establish board-approved policies for managing exposure limits in consumer lending. The RBI has raised the risk weights for consumer credit exposure in commercial banks.

Major financial institutions are anticipated to exhibit greater resilience in the face of these transformations, given their substantial capital reserves.

Majority of the prominent lenders continue to maintain capital levels well beyond the regulatory thresholds, even when accounting for elevated risk weights. It is expected that these entities will transfer the heightened costs to borrowers, and adjust their lending strategies to effectively navigate the dynamic landscape.

Traditional banking behemoths are navigating a landscape where capital adequacy, risk management, and corporate governance reforms are paramount:

State Bank of India: Despite having a lower Capital Adequacy Ratio (CAR) in comparison to private counterparts, SBI must accelerate its capital-raising initiatives to align with the revised requirements. The increased risk weights on unsecured loans may compel SBI to reevaluate its lending strategy and enhance its risk management practices.

HDFC Bank: HDFC bank is known for its robust risk management and there might be a need to recalibrate its exposure to unsecured loans. The impact on the bank could influence its capital allocation and necessitate adjustments in its lending portfolio.

ICICI Bank: ICICI Bank may need to reassess its risk models and lending practices to conform to the increased scrutiny.

Fintech Sector Resilience:

The impact of the RBI's move on unsecured loans is particularly relevant for the fintech sector. Fintech companies, known for their agility and innovation, are challenged to recalibrate their strategies in response to the regulatory environment. As unsecured loans often form a significant part of fintech lending portfolios, this move could reshape their business models.

Thus, RBI's move on unsecured loans will have influence operational strategies, risk evaluations, and customer interactions for fintech companies.



Balancing Risk and Innovation:

The fintech sector is navigating the delicate balance between risk management and innovation. While regulatory changes pose challenges, fintech firms also see an opportunity to showcase their adaptability and resilience. The move on unsecured loans prompts a re-evaluation of lending practices, urging fintech players to demonstrate responsible and sustainable lending.

As RBI tightens its grip on unsecured loans, the reverberations are felt across the spectrum of financial institutions. Traditional giants, and fintech innovators, alike are compelled to reassess their risk management frameworks and operational strategies. This move entails a comprehensive view of the evolving landscape, emphasizing the need for a resilient and balanced approach to ensure the stability of India's financial ecosystem in the face of regulatory shifts.



09 – Impact

From women-led development to women-led sustainable development

2023 has been a pivotal year for policy making for women, with *women-led development* instead of simply *women's development* having been brought to the fore in the New Delhi Leaders' Declaration of the G20 under India's Presidency. At the same time, the COP28 meeting from 30th November 2023 is also engaging in deliberations (continuing on from previous COPs) on questions of gender and climate – from perspectives of gender and climate data, gender-responsive solutions, and financing for a gender-just transition. The time is therefore ripe **to take the vision for women-led development a step further to that of women-led sustainable development.**

The role of gender considerations in climate finance and climate policy more broadly need to be adopted, from both a mitigation and adaptation perspective. This also could incorporate how women can:

- contribute to driving the green transition (ex: as climate entrepreneurs),
- benefit from the green transition (ex: as users of agricultural practices that are environmentally sustainable as well as financially viable), and
- be protected from climate change-related losses and damages (eg, from reduced agricultural productivity, infrastructural damage etc).

Although it is well-established that women face greater harm from climate change, climate finance primarily flows into traditionally male dominated sectors, with limited channelling towards projects that also address gender inequality. In fact, up to 90% of global finance aimed at addressing climate mitigation targets sectors, like energy and transport which primarily employ men. Sectors such as forest and agriculture, which often employ more women have tended to receive less attention. The following actions are needed at scale to support women in benefitting from the green transition:

- Initiatives such as Startup India, to explicitly support and drive women 'climate entrepreneurs' working on climate change mitigation and adaptation solutions. While initiatives like 'Women Climate Champions: ImpactAim SDG5 Accelerator Programme' are laudable, they are targeting a very small number of start-ups.

- Effective market-driven upskilling and mentorship programmes. India is implementing its Green Skill Development Programme, aimed at the developing a skilled workforce in areas such as renewable energy, energy efficiency, sustainable agriculture, and biodiversity conservation. Proactive and large-scale inclusion of women in such programmes, with subsequent mentorship, role modelling by successful women and linkages to employers are required.
 - Planned and coordinated evidence generation on technologies and solutions that drive climate results while also driving gender equality, with subsequent financing for programmes for knowledge and technology transfer to women in business (including MSMEs in particular), agriculture and other sectors.
 - With MSMEs being the backbone of the Indian economy, funds /schemes need to be set up to support women-led MSMEs to transition to climate friendly technologies and practices, as well as for providing them with funding for climate change adaptation.
 - At the same time, there is a need for data on gender-sensitive climate solutions being provided by MSMEs, with a programme to scale these up.
 - While the policy discourse is emphasising STEM education for girls, STEM education curriculum itself needs to be enhanced to incorporate climate change mitigation and adaptation as central components.
 - Schemes / funds for effective community-based solutions such as 'green villages', where all services (ex: electricity in homes and schools, water purification etc) may be run on renewable energy managed by women entrepreneurs.
 - India has launched sovereign green bonds and even municipal green bonds. Inclusion of a strong gender lens in selecting projects funded through these would go a long way.



Jayesh Ranjan

- Principal Secretary, Dte of Information Technology, Electronics & Communications (ITE&C) and Department of Industries & Commerce

Jayesh Ranjan has been involved with developing policy frameworks, attracting new investments, identifying opportunities for utilizing IT in various government processes, and promoting the digital empowerment of the citizens. He has played a

pivotal role in promoting the Telangana state as a leading destination for Media and Entertainment (M&E) investments. Under his leadership, Telangana State is rapidly developing as one of the country's preferred M&E hubs

10 – Expert Speak

Telangana's journey has been the stuff of case studies – from being the youngest state, to arguably one of the more tech enabled and industry and innovation friendly states in the country, to now targeting to be a national leader in Web 3.0. What according to you are the 2-3 differentiators that sets Telangana apart?

Telangana as a state, has grown in leaps and bounds in the last decade or so. It has been a steady and sure-footed evolution. Skilled talent pool, business-friendly policies, and a vibrant ecosystem makes the state one of the attractive destinations for doing business. Hyderabad has been rated among the top 3 destinations to attract talent, and ranked second highest when it comes to employable talent in the country.

This has been made possible due to the fact that Hyderabad offers one of the best quality of living, and at a lower cost among the major cities in the country. Additionally Telangana has been consistently ranked as one of the top 3 states in Ease of Doing Business in India. Telangana has implemented single window clearances / a single point for obtaining approvals from all departments, which has helped bring down the turnaround times for clearances for anyone wanting to setup a business.

Talking about AVGC, while many other states have today worked towards having a policy and a structure in place, Telangana has announced for the launch of a dedicated infrastructure space for this sector and its constituents. And the scale planned is huge. What are the 2-3 most important drivers for this initiative?

From very early on, we saw the potential that the AVGC sector holds and realized that it had the potential to become the next "IT" sector for India. In order to realise this vision it was important to nurture creativity and innovation and we became the first state in the country to come up with a dedicated policy back in 2016 for the AVGC sector.

Our IMAGE policy is a comprehensive plan aimed at promoting the growth of the animation, visual effects, gaming, and comics industries in the state through financial incentives such as reimbursement of production costs, lease rentals, entertainment tax etc.

We work on a customized business model and believe in the fact that quality of work and brand recall of the entity should be given a higher weightage. With this aim in mind, we started working on the IMAGE Tower which aims to be a one-stop destination for both domestic and global players for AVGC related work.

The tower shall have state-of-the-art facilities that are used in creating animations, visual effects and games and will also house our very own IMAGE Centre for Entrepreneurship to incubate the startups working on various innovations and IPs in this space.

The idea is to have the entire ecosystem, including the allied and ancillary industries, in a cluster sort of a setup to enable inclusive and comprehensive growth, while giving opportunities to all stakeholders in this segment.

Skilling is again a very important vertical for any industry and with the evolution of niche technologies, this further becomes more important, as being real time updated and upskilled is critical. What are the important steps that Telangana is taking in this segment?

Telangana has always given special attention to bridging the demand and supply gap of human resources through various skill development programmes. Hence, the government established TASK - Telangana Academy for Skill and Knowledge in 2014 - a first-of-its kind skill development initiative from the ITE&C department, aimed at strengthening the quality of graduates coming out of colleges. Presently, more than 720 colleges have registered with TASK and it has research partnership with IIIT-Hyderabad as well.

TASK has established multiple industry collaborations which have led to the establishment of training programs, knowledge-sharing initiatives, and joint ventures.

TASK has also initiated Entrepreneurship Development Program to promote social innovation and rural entrepreneurship among the youth of Telangana. The results of all these initiatives are for everyone to see.

Over 8.7 lakh youth across the state of Telangana have been skilled since TASK's inception in 2014. TASK offers over 110 industry-oriented programs working with over 80+ industry and corporate partners.

As we develop further, the plan is to have more such skilling related initiatives, which can then enable a more productive workforce especially in niche technologies.

10 – Expert Speak

TASK



YOUTH REGISTERED
301019 +



PROGRAMS OFFERED
110 +



INDUSTRY PARTNERSHIPS
80 +



STUDENTS SKILLED
871822 +



FACULTY SKILLED
17353 +



PLACEMENTS PROVIDED
32000 +



STUDENTS TRAINED IN ENTREPRENEURSHIP
30000 +

Indicative collection of courses being offered at TASK



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FOR ENGINEERING STUDENTS
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Even under the broader umbrella, almost all industries from pharma to IT to defence to agriculture, there are many industries that have the world leading companies present in the state. What next? Which is the one new sector / industry that according to you that the state would focus on in the coming years and why?

Telangana as a state has grown across industries, be it pharma or defence or technology. The structured ecosystem and friendly policies have contributed to this growth. As a state ecosystem, we believe we have the potential to continue to increase this contribution multiple times. We are the vaccine capital of the world, we are single source suppliers to many global OEMs in defence and aerospace, we have the world's biggest technology companies with large campuses in Hyderabad – there are many firsts and we strive to achieve many more. However, since you ask about one sector / industry, let me pick AVGC itself.

As highlighted earlier, we intend to become the AVGC capital of the country and gradually aim to become a global brand when it comes to anything related to the AVGC sector. We believe that with more than 150+ companies in the state today working in the VFX industry and thousands of employees working in the AVGC space, the state has the talent, the resources, the atmosphere as well as the ambition to be able to achieve that.

While India's potential in this sector has achieved global recognition through companies including Green Gold Animation, Rotomaker, Purpletalk, we are looking to create a consolidated and structured approach to the industry. Please bear in mind, this is not one industry that we are talking about. These are 4 industries being clubbed as one under the AVGC umbrella. Hence the scope is huge. India's share of the global AVGC market is less than 1%. We aim to leverage the IMAGE tower to contribute significantly in the growth hereon.

About Primus Partners

Primus Partners has been set up to partner with clients in ‘navigating’ India, by experts with decades of experience in doing so for large global firms. Set up on the principle of ‘Idea Realization’, it brings to bear ‘experience in action’. ‘Idea Realization’— a unique approach to examine futuristic ideas required for the growth of an organization or a sector or geography, from the perspective of assured on ground implementability.

Our core strength comes from our founding partners, who are goal-oriented, with extensive hands-on experience and subject-matter expertise, which is well recognized in the industry. Our core founders form a diverse cohort of leaders from both genders with experience across industries (Public Sector, Healthcare, Transport, Education, etc.), and with varied specialization (engineers, lawyers, tax professionals, management, etc.).



PASSION

for providing solutions to help clients achieve their goals

RESPECT

For all and alternate viewpoints

INTEGRITY

of thoughts and actions

MASTERY

of our chosen subject to drive innovative and insightful solutions

US

Representing the Primus collective, where each individual matters

STEWARDSHIP

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