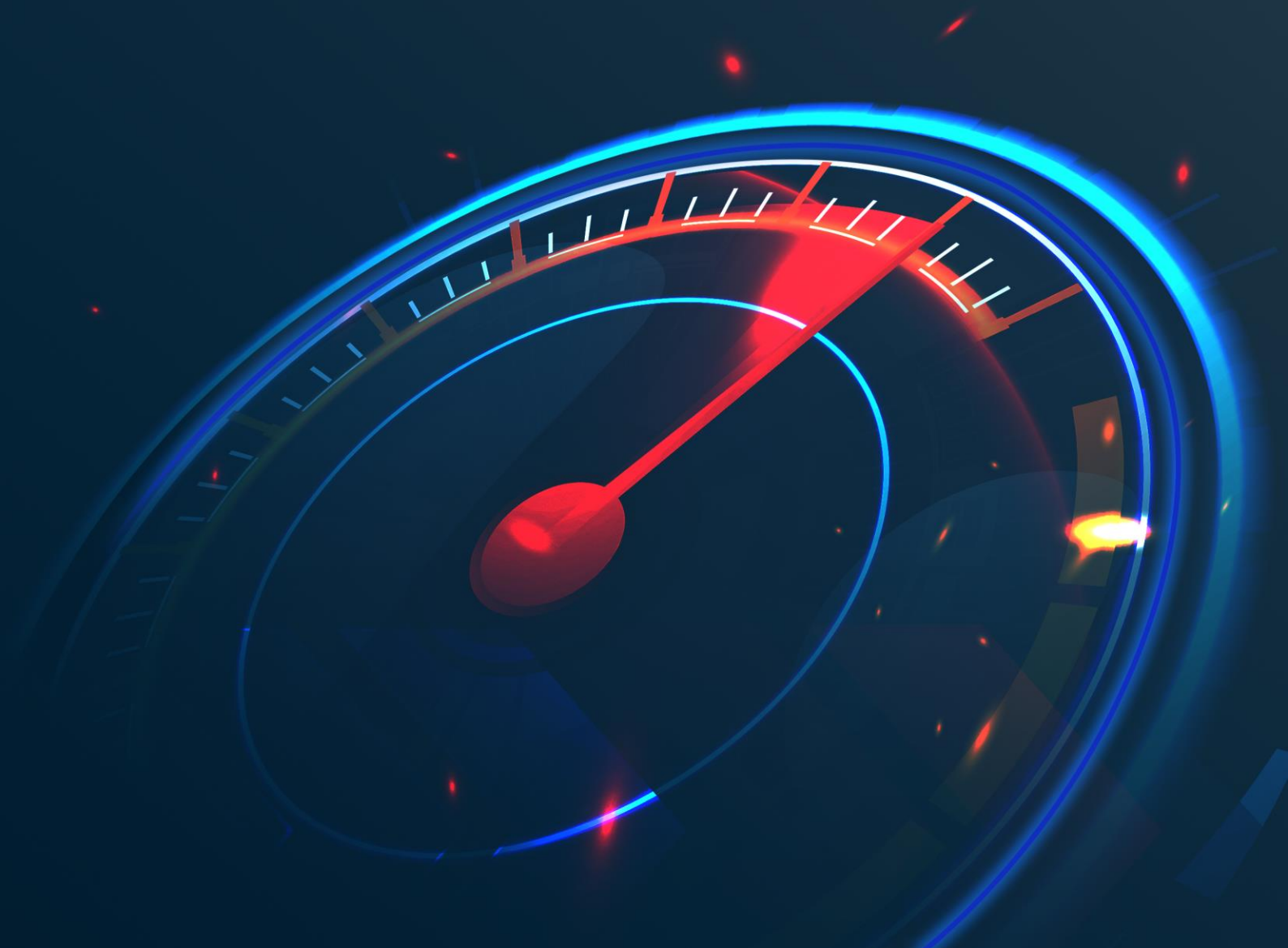


# MOVING THE NEEDLE

THE JOURNEY FROM POLICY  
TO IMPLEMENTATION



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Dear readers,

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Welcome to our February Edition of Moving the Needle where we continue our journey in finding solutions for India's tomorrow.

In this journey, we look at innovative solutions towards fulfilling India's energy, education, tourism, aerospace and maritime potential with a succinct dive into latest developments in those sectors.

We are also delighted to share our Report on 'Union Budget 2025-26' consisting of inputs from **30 industry leaders, experts, and stakeholders** from various sectors. The uniqueness of our budget report lies in how we developed and deployed our own framework for Viksit Bharat based on 7 key themes. This framework gauges how the current budget helps us move towards our long-term goals. We envision a developed and self-reliant India, built on a foundation of economic strength, social well-being, and global leadership.

Happy Reading!

Sincerely,  
Moving the Needle Team



# 1

## Energy

### Small Modular Reactors: The Key to India's Clean Energy Future



**Small nuclear power plants**

As India marches towards its ambitious clean energy goals, the role of Small Modular Reactors (SMRs) in bridging the gap between demand and sustainability has come under sharp focus. These compact, factory-built nuclear reactors, each generating up to 300 MW of electricity, offer a compelling alternative to traditional large-scale nuclear plants. With the government actively pushing for reforms to invite private investment into the sector, SMRs could be the missing link in India's energy transition.

#### The Need for SMRs

India's current installed power capacity stands at around 425 GW, but nuclear energy contributes a mere 6.8 GW, or roughly 3% of the total.

While ambitious plans exist to push nuclear capacity to 20 GW by 2032, dependence on large nuclear projects alone may not be sufficient. Large reactors take over a decade to build, require massive financial investments, and face logistical and environmental hurdles.

SMRs, on the other hand, offer a faster, safer, and more adaptable solution. They can be manufactured in a controlled factory environment and transported to sites for installation, significantly cutting down construction time and costs. More importantly, their modular nature allows incremental additions to capacity, enabling India to scale up its nuclear energy footprint without overburdening public finances.

1

Energy (Contd.)

What Makes SMRs a Game Changer?

1. **Safety First:** SMRs come with built-in passive safety features, reducing the risk of reactor failures. The International Atomic Energy Agency (IAEA) has highlighted their inherent safety mechanisms as a key advantage over conventional reactors.
2. **Adaptability & Accessibility:** Unlike large nuclear plants that require vast land and water resources, SMRs can be deployed in remote areas, including regions where renewable energy integration is difficult.
3. **A Renewable Energy Companion:** With India committed to reaching net-zero emissions by 2070, SMRs can complement solar and wind power, balancing the grid when renewables fall short due to weather variability.

**Policy Push: Opening Doors to Private Players**

Looking ahead, with robust policy framework in place India has a potential to produce ~62 Million Metric Tonnes (MMT) of CBG annually, meeting 9% of India's energy demand. As per the International Energy Agency (IEA) estimates, India will contribute a quarter (25%) of the growth in global energy consumption in the coming two decades. BP estimates that India's energy demand will double, while natural gas demand is expected to grow five-fold by 2050.

Hence, with India's huge potential for biogas and Government's vision to capitalize on the opportunity, as evident by the robust government policies and initiatives, addressing the

infrastructural, Regulatory, Pricing & Technology related challenges will be key enabler in catalyzing sustainable development of Biogas sector.

**Challenges & The Road Ahead**

Despite their promise, SMRs are not without challenges. Regulatory hurdles and technological maturity remain critical concerns. While countries like the U.S., Canada, and Russia have made strides in SMR deployment, India will still need significant R&D investments, global partnerships, and policy clarity to catch up.

However, with the government's push for nuclear liberalization and the growing urgency to meet climate goals, SMRs could soon become an integral part of India's clean energy revolution. If executed well, they will not only boost India's energy security but also position the country as a global leader in next-generation nuclear technology.



# 2

## Education

A promise waiting to be kept, as NEP 2020 nears its 5<sup>th</sup> birthday



In 5 months, it will be 5 years since the **National Education Policy 2020** was launched. Under the NEP 2020 vision, fulfilment of 2 key targets hold the key for mainstreaming future workforce “**Increase the GER in HE** (to 50% from 27%) by 2035” and “**establish one multidisciplinary Higher Education Institution (HEI)** in/near every district by 2030”.

Time is slipping by and to move the needle, the challenge is 2-fold – (i) provide **access to higher education, solve for low enrolment with inclusion of vulnerable groups** like the poor, females and minorities and (2) upgrade HEI for **consolidation into or establish new Multidisciplinary HEI**, with focus on academics, research and infrastructure adequacy, specifically in districts with reasonable GER in secondary education to bridge to encourage transition from secondary to higher education.

There are ~4.13 crores students enrolled in higher education, with 3.5 crore student population in government HEI. Around 1.3 crore students in government schools complete secondary education every year, but only ~60 Lakh students in government schools enter higher education. Many financially disadvantaged students drop out after secondary school, despite having the potential or a dream to study further, because of lack of access to an affordable HEI offering the stream of their choice. There are only ~1.1 crores scholarships available in higher education being availed by ~1 crore Students. This points to the need to not only mobilise more students to transition into Higher Education, and to provide financial assistance, but to have more HEI within accessible distancing minimising distance travelled or migration.

2

## Education (Contd.)

In 2024 Ministry of Education invited corporates to fund scholarships for aspiring and meritorious students lacking means to be enrolled in HEI under **Vidyanjali** Programme. This initiative is a Call To Action for CSR and philanthropies to participate in a shared vision of nation building - by increasing accessibility for financially disadvantaged students to complete their education and acquire mentorship from top industry players with the support of scholarships funded by CSR / philanthropy under **Vidyanjali**. This effort will actualize on ground social impact and will also empower the marginalised student with '**Choice of College**', and **equal opportunity** to dream of a career path and enrol for desired courses/colleges which may be out of reach due to social or financial disadvantage. Opening one education opportunity for a student may help break inter-generational poverty for an entire family. The programme focus is on providing scholarships for girls and students from rural areas, North-east, aspirational, districts and on STEM programmes.

The programme also builds in psychometric testing to help students of grades 9-12 discover career paths. ~62% students in India rely on parental or peer advice for career decisions - leading to misaligned choices; as a result, students are not being prepared for future of work through informed career choices and mentorship. Organic increase in enrolment will take time so the Ministry is releasing a digital market-place as a bridge to connect CSR and philanthropic funders with authenticated database of students – in the hope that this platform will become the highway for connecting

students to their dream of getting a higher education, which will help the nation honour its collective NEP 2020 promise.

But the promise is still many steps away from being realized. To solve for access into HEI, states need to have an actionable roadmap to identify institutions for consolidation / upgraded to or establish new **Multidisciplinary HEI** with focus on academics, research and infrastructure adequacy. States need to also support government HEI by providing subject matter experts for carrying out curriculum gap analysis w.r.t Industry requirement. In addition, a plan for expansion of Open and Distance Learning (ODL) benchmarked to private / government HEIs will open alternate routes for improving enrolment. Framework for Multiple entry Multiple exit points that can be provided to students in HEIs can support students' fitment into switched disciplines and enabling a better career fit.



# 3

## Tourism

### MICE Tourism in India:

A Booming Industry with Global Potential



Over the years, the Meetings, Incentives, Conferences, and Exhibitions (MICE) industry has become a powerful driver of economic growth across the world. It generates employment, boosts local businesses, and strengthens industries such as hospitality, tourism, transportation, and entertainment. Beyond economic benefits, MICE tourism plays a crucial role in fostering business collaborations, knowledge exchange, and global networking.

India, with its growing economy, world-class infrastructure, and rich cultural experiences, is steadily carving a niche for itself in the global MICE landscape. With continuous improvements in ease of doing business, large-scale investments in

convention centres, and enhanced transport connectivity, the country is positioning itself as a preferred destination for business events and international conferences.

#### Understanding MICE Tourism

MICE tourism is a specialized sector of the travel industry that caters specifically to business travellers attending corporate events, industry gatherings, and exhibitions. It includes:

- **Meetings** – Corporate gatherings for discussions and decision-making.
- **Incentives** – Travel programs offered as rewards by companies to employees or clients.



# 3

## Tourism (Contd.)

- **Conferences** – Large-scale forums bringing together industry leaders, academia, and policymakers.
- **Exhibitions** – Platforms for businesses to showcase their products, services, and innovations.

The core objective of MICE tourism is to provide an interactive platform for businesses, governments, and academic institutions to engage, collaborate, and innovate.

### Global MICE Scenario and India's Standing

The International Congress and Convention Association (ICCA) ranks countries based on the number of international meetings they host. As per ICCA's 2022 rankings:

- The USA leads the global MICE market with 690 international meetings, followed by Spain and Italy.
- India ranks 37th, hosting just 68 international meetings, capturing less than 1% of the global MICE market—a stark contrast to its economic strength and tourism potential.

Despite this, India is making notable progress in global tourism rankings:

- According to the World Economic Forum's (WEF) Travel and Tourism Development Index (TTDI) 2024, India now ranks 39th out of 119 countries, significantly improving from 54th in 2021.

- The travel & tourism industry contributed over \$199.3 billion to India's GDP in 2023 and is expected to grow to \$51.2 billion by 2028 (WTTC Economic Impact Report, 2024).

These numbers, on the one hand, indicate India's rising prominence in global tourism and, on the other hand, showcase untapped potential in the MICE sector.

### India's G20 Presidency: A Milestone for MICE Tourism

- India's tenure as the G20 President (December 2022 – November 2023) was a turning point for its MICE industry. The country hosted nearly 200 high-profile meetings across 50-plus cities, welcoming global leaders, international organizations, media representatives, and industry professionals.
- These events boosted India's global standing and created a significant economic impact. The G20 Presidency also allowed delegates to experience India's diverse cultural heritage through music, dance, and historical landmarks, making these meetings more than just business gatherings.



## 3 Tourism (Contd.)

### Challenges and the Way Forward

India can become a global MICE powerhouse, but challenges like limited infrastructure in tier-2 and tier-3 cities and a low global market share persist. A multi-pronged approach focussing on single-point facilitators, fast-tracking event approvals, enhancing global marketing, etc. The establishment of MICE bureaus in the states and a national strategy focusing on city-specific bureaus are the steps taken in the right direction.

They can pave the way for a more structured and efficient MICE ecosystem, enabling seamless event execution, attracting global conferences, and boosting India's competitiveness in the international MICE market. Successful G20 meetings have showcased India's capabilities, and with strategic reforms, investments, and innovation, India can emerge as a leading destination for global business events.



4

## Aerospace & Defence

### Addressing the IAF's Aircraft Shortfall for Strengthening the Skies



India's geopolitical landscape demands an Air Force that is technologically advanced and combat ready. However, with just 31 squadrons in operation compared to the sanctioned 42, the Indian Air Force (IAF) faces a glaring shortfall in its fleet strength. With rising security challenges along the northern borders and in the Indo-Pacific, this deficit threatens national security and operational preparedness.

The recent government decision to establish a committee to address this critical issue signals a strategic intent to modernize and expand the IAF's capabilities. This initiative aligns with the decision of the Ministry of defence to designate 2025 as the 'Year of Reforms', marking a significant step in our journey towards Atmanirbhar and Viksit Bharat, with focus on self-reliance and indigenous production.

Aging aircraft like the MiG-21, combined with delays in acquisitions, have compounded the IAF's fleet crisis. According to a recent report by the Parliamentary Standing Committee on Defence (2023), the current shortfall undermines India's deterrence capabilities in a two-front conflict scenario. The induction of 83 Tejas Mk-1A jets is promising, but production delays and phasing out older fleets exacerbate the gap.

**Strategic measures need to be implemented to tackle this issue:**

Projects such as the Tejas Mk-2 and Advanced Medium Combat Aircraft (AMCA) should be given priority, with accelerated timelines and seamless funding. Enhanced collaboration with global defence leaders can bridge technological gaps.

4

Aerospace & Defence  
(Contd.)

- To meet immediate demands, the IAF should be able to lease aircraft, something the Navy has done effectively. Expedited deals with trusted partners like France (Rafale) and the US (F-21) can bolster fleet strength.
- Upgrading and overhauling legacy platforms like the Su-30 MKI and Jaguar can extend their operational life, providing interim relief. Investments in drones, UAVs, and AI-enabled systems can complement traditional fleets. India should adopt global best practices to integrate these technologies into its defence strategy.
- Expanding private sector participation under Make in India can enhance production capacity and foster innovation. Joint ventures with global firms will help build a robust defence manufacturing ecosystem.

With China's aggressive modernization of its air fleet and the US's focus on technological superiority, India must focus on this. The government's committee must ensure a clear roadmap for both short-term gap-filling and long-term fleet expansion. This includes timely budget allocations, policy incentives, and oversight mechanisms to avoid delays.

Strengthening the IAF is not just about numbers but about achieving a force equipped for multi-domain warfare. As the lynchpin of India's defence strategy, the IAF must evolve into a technologically superior force that safeguards national interests and projects power in an increasingly contested airspace.

In the race for air dominance, India cannot afford to falter. Decisive action now will ensure that the IAF remains a formidable guardian of the nation's sovereignty.



5

## Ports and Shipping

### Bridging Oceans: India's Strategic Initiatives in Global Maritime Cooperation



As India continues its journey towards maritime excellence under the Maritime Amrit Kaal Vision 2047, international cooperation has emerged as a fundamental pillar in shaping its maritime aspirations. In the previous edition, we explored India's evolving maritime strategy, highlighting the critical role of multilateral forums, key agreements, and strategic objectives. Building upon that foundation, this chapter delves deeper into India's active engagement with global partners, its diplomatic initiatives, and the far-reaching impact of its maritime collaborations. From strengthening ties with regional alliances like BIMSTEC and ASEAN to playing a pivotal role in shaping international maritime policies at the IMO, India is steadily solidifying its position as a key player in global maritime governance. With a focus on

sustainability, security, and technological innovation, India's maritime diplomacy is not just about trade and defence—it is about adopting a future where shared prosperity and oceanic sustainability define the global maritime landscape.

#### International Maritime Organization (IMO)

**The International Maritime Organization (IMO)** is a specialized agency of the United Nations responsible for regulating shipping to ensure safety, security, and environmental sustainability. Established in **1958**, the IMO develops global maritime regulations covering areas such as pollution control, ship safety, maritime security, and legal matters. Its conventions, such as **MARPOL (Marine Pollution Convention)** and **SOLAS (Safety of Life at Sea)**, set international standards that



## Ports and Shipping (Contd.)

member states adopt and implement to maintain uniformity in global shipping operations. The IMO plays a crucial role in promoting international cooperation, bringing together nations to address common challenges such as piracy, emissions reduction, and digitalization in the maritime sector.

For India, the IMO is a key platform for advancing its maritime interests on the global stage. As a member since 1959, India has actively participated in IMO conventions, shaping regulations that align with its MAKV 2047. India has contributed significantly to discussions on green shipping, seafarer welfare, and maritime safety while also advocating for developing nations in global maritime policies. Moreover, India's engagement with IMO-led capacity-building programs and its push for sustainable and digitalized shipping solutions reflect its commitment to international maritime cooperation. India is also steadily progressing towards strengthening its representation at the IMO Committees and Chair positions.

### **Turning India's Vision for International Maritime Cooperation into Reality**

To transform India's vision for international maritime cooperation into reality, a strategic, multi-pronged approach is essential. The approach is an amalgamation of institutional measures, global collaborations, promotional initiatives built on the steadily progressing foundation of the Maritime Amrit Kal Vision 2047.

### **India taking the Centre Stage Globally**

The Global Maritime Summit (GMIS) was a landmark event that underscored India's commitment to advancing international maritime cooperation. Bringing together global industry leaders, policymakers, and maritime experts, the summit served as a dynamic platform for dialogue, collaboration, and knowledge exchange. The event highlighted key themes such as sustainable shipping, digital transformation, green port initiatives, and maritime security, reinforcing India's role as a hub for innovation and strategic partnerships. By facilitating discussions on cutting-edge maritime policies and investment opportunities, the summit not only strengthened India's ties with major global players but also showcased the nation's growing capabilities in shaping the future of the maritime industry.

To make India's vision for international maritime cooperation a reality, such engagements must be expanded and institutionalized. Hosting more high-impact global forums, maritime conclaves, and strategic dialogues will ensure sustained international collaboration and investment inflows into India's maritime sector. These events forward meaningful alliances, encourage policy harmonization, and provide a platform for emerging maritime nations to align with global best practices.

# 5

## Ports and Shipping (Contd.)

India in a mission to boost international cooperation and development in its ports has rekindled strategic associations through **Sister Ports Associations** with Global Ports and enhanced collaboration with the **International Association of Ports and Harbors (IAPH)**. The **Sister Ports Association**, an existing but dormant guild amongst the Indian Major ports, promotes bilateral partnerships between Indian ports and leading global ports, enabling the exchange of best practices in port management, technology, sustainability, and trade facilitation. This initiative enhances operational efficiency, promotes knowledge sharing, and attracts foreign investment, positioning Indian ports as competitive global trade hubs. While many of the Indian Major ports have many such existing Associations with Global ports, there is a dearth for streamlined engagement and a standard operating procedure to guide the Major Ports in this endeavour. Establishing joint working groups as part of the Sister Port Agreements/ MoUs, focused on the knowledge transfer and R&D between the Ports, shall help reap the multitude of benefits from this Association.

Additionally, deeper engagement with IAPH, a premier global alliance of ports, strengthens India's role in shaping international maritime policies, embracing digitalization, and integrating green port initiatives. The membership at IAPH provides the platform to participate with experts in Working groups and Technical Committees (including IMO) on numerous topics of relevance to global ports. It opens doors to game changing initiatives in Global Maritime landscape such as Clean Marine Energy

Hubs, IAPH Environmental Ship Index, IAPH World Ports Sustainability Program, Port Endeavour Game and so on. By leveraging these collaborations, India is not only modernizing its port infrastructure but also aligning itself with global standards, thereby driving resilient growth, enhancing trade connectivity, and reinforcing its maritime influence on the world stage.

### Enhancing India's Presence in Global Maritime Forums

For India to establish itself as a true global maritime leader, it must actively enhance its representation and influence across **key international maritime organizations**. While India has been a long-standing member of the **International Maritime Organization (IMO)**, greater participation in decision-making bodies will allow it to shape global regulations in line with its MAKV 2047. Additionally, stronger engagement with institutions like the **International Maritime Law Institute (IMLI)** and the **World Maritime University (WMU)** will ensure that Indian policymakers, maritime professionals, and legal experts contribute to shaping the future of maritime governance, education, and sustainability. Above all, India is the mother of Dr. C.P. Srivastava, one of the longest Secretary Generals of the IMO, who served successive four year terms and played a pioneering role in establishment of International Maritime Academy, Italy and the International Maritime Law Institute, Malta. It is high time India regains its stature at these Global Maritime Forums.

5

Ports and Shipping  
(Contd.)

Engaging proactively with **the International Chamber of Shipping (ICS), the Baltic and International Maritime Council (BIMCO), and the International Transport Workers' Federation (ITF)** can further strengthen India's standing in global maritime trade, logistics, and seafarer welfare. By securing leadership roles, co-sponsoring policy proposals, and advancing deeper collaborations within these organizations, India can drive conversations on maritime sustainability, security, and economic growth.

**The Way Forward**

As India continues its journey towards becoming a global maritime powerhouse, the way forward lies in sustained engagement, innovation, and strategic collaborations. Strengthening partnerships through bilateral and multilateral agreements, increasing its

representation in global maritime forums, and investing in cutting-edge port infrastructure will be key to realizing the Maritime Amrit Kaal Vision 2047. Emphasizing green shipping, digital transformation, and skill development will further enhance India's competitiveness in the international maritime landscape. Hosting more global maritime summits, expanding sister port relationships, and leading discussions on enduring and secure maritime practices will ensure that India remains at the forefront of shaping global maritime policies.

India's maritime ambitions are firmly anchored in international cooperation, and strategic growth. By reinforcing its presence in global platforms and adopting future-ready policies, India is poised to emerge as a leading force in the Global maritime Ecosystem.





6

# Primus Outreach and Impact

Report: Union Budget  
FY 2025-2026

### #PolicySquare

To understand the more fundamental questions in policy making

### #LeadersSpotlight

To highlight opinions of sector/segment leaders

### #PrimusPodcast

To bring together policymakers & thinkers in areas of critical importance

Our Budget Report that we released on 01 February 2025 is structured around the framework of Viksit Bharat , focusing on **seven key themes** that drive growth and inclusivity. It incorporates insights from over **30 industry leaders, experts, and stakeholders** from various sectors.

This budget goes beyond just tax reforms—it presents a **holistic and forward-looking plan** to strengthen the **private sector, empower MSMEs**, and drive innovation. The government’s emphasis on **boosting investor confidence and fostering collaboration** highlights its commitment to long-term, inclusive economic growth.



Primus Reports: 'Union Budget FY 2025-2026'

6

Report: Union Budget  
FY 2025-2026 (Contd.)

The uniqueness of this budget report lies in how we developed and deployed our own framework for Viksit Bharat based on 7 key themes. This framework helps us gauge how the current budget helps us move towards our long-term goals. We envision a developed and self-reliant India, built on a foundation of economic strength, social well-being, and global leadership.

One critical takeaway: **Implementation will be key**. The capacity within the Government, and its ability to **collaborate with States**, will determine how effectively and timely these proposals translate into **impactful outcomes**.

The Full Report can be found here at:

<https://lnkd.in/gRA7ERWh>

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₹ BUDGET  
FY 2025-26

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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. Established by seasoned industry leaders with extensive experience in global organizations, Primus Partners boasts a team of over 250 consultants and additional advisors, showcasing some of the finest talent in the nation.

The firm has a presence across multiple cities in India, as well as Dubai, UAE. In addition, the firm has successfully executed projects across Africa, Asia Pacific and the Americas.

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