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MOVING THE NEEDLE

Dec 2025 Edition

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Welcome to the December 2025 edition of Moving the Needle, brought to you by Primus Partners. December is the month when we pause, take a breath and look back at the year that was.

This month's articles spotlight on how interventions, however humble, can ripple outward to shape long-term impact. Across sectors as varied as defence, capital markets, real estate, technology, and maritime trade, the country is seeing a shift that is going beyond than just numbers.

This MTN edition reflects on:

- **How Defence R & D needs a new policy contract:** India's defence manufacturing story has changed gear and taken big strides. But the next uptick will depend on India's ability to develop and scale new technologies at speed. A new policy contract is emerging where scientists, program managers, start-ups, and MSMEs work as co-builders rather than peripheral suppliers.
- **Building a robust SME Market:** A pathway to deepening India's capital ecosystem India's MSMEs remain the backbone of the economy and the way forward lies in active market makers, dedicated funds and ETFs focused on the SME ecosystem.
- **Green Building Revolution:** How policy, incentives, and yechnology are reshaping real estate- The green buildings market in India is projected to hit USD 39 billion by 2025. Technology is helping developers cut energy use, follow compliance with ease, and achieve operational efficiencies which was not imaginable even a few years ago.
- **PRIMUS OUTREACH:**

  i : India–U.S.: The World's Most Consequential Tech Partnership Takes Shape: The dialogue in New York, leading up to the AI Impact Summit 2026, captured the energy of a partnership that has moved from intent to implementation.

  ii : India Maritime Week 2025: Navigating a New Era of Maritime Transformation: India Maritime Week (IMW) has grown from a policy dialogue into a global movement redefining the nation's maritime narrative

As we gear up for the new year with renewed purpose, let's close this year with a resolve, and a shared commitment to better the policy to advocacy to impact realization landscape of the country.

Until next time,
The Editorial Team
Primus Partners – Moving the Needle

01

India's Defence R&D Needs a New Policy Contract

India's defence manufacturing story has changed gear. Indigenous production has touched a record ₹1.54 lakh crore in FY 2024–25, with exports reaching ₹23,622 crore and India now supplying defence equipment to around 80–100 countries. Defence Public Sector Undertakings still account for the bulk of output, but the private sector's share has risen to 23%, backed by over 16,000 MSMEs in the value chain. The Ministry of Defence has earmarked 75% of its modernisation budget—₹1,11,544 crore this year—for procurement from domestic industry, locking in demand for Indian platforms and components.

These are big strides. But the next uptick will depend on India's ability to develop and scale new technologies at speed. That, in turn, calls for a fundamental rethink of how we design, fund and scrutinise defence R&D.

We are getting the plumbing right: budgets, indigenisation lists, FDI norms, defence corridors, export facilitation, iDEX, TDF and now the ₹1 lakh crore Research, Development and Innovation (RDI) scheme. But the culture around defence R&D is still heavily shaped by a fear of failure and by post-facto audit frameworks that are designed to catch mistakes, not to reward intelligent risk-taking.

For India's next phase of defence growth, we need a new policy contract around R&D—one that is positive, encouraging and ecosystem-centric.

First, defence R&D must move from "project as contract" to "portfolio as mission". Instead of treating each R&D project as a potential audit liability, ministries and PSUs should manage portfolios where a certain, explicitly accepted proportion of projects can fail, provided the overall mission advances.

Second, we should hard-wire start-ups, MSMEs and academia into core defence missions—not as peripheral vendors, but as co-designers. The government has already created Defence Industry–Academia Centres of Excellence and opened TDF and iDEX windows for young firms. The next step is to give these entities longer visibility of demand, multi-year challenge calls and sandbox test ranges where technologies can be iterated quickly with the Services in the loop.

Finally, we must consciously de-risk the careers of scientists, programme managers and uniformed champions who back ambitious R&D. Clear, transparent rules can—and should—separate bona fide technological risk from procedural wrongdoing. When a high-risk programme fails honestly, the default institutional response should be to extract lessons and move resources to the next iteration.

If we can reframe defence R&D — less about post-mortem audits, more about mission-driven learning — India's next leap in defence capability and export competitiveness will be inevitable.

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02

Building a Robust SME Market:

A Pathway to Deepening India's Capital Ecosystem

Micro, Small, and Medium Enterprises (MSMEs) form the backbone of India's economic architecture, contributing a significant **29.2%** to India's GDP[1] and employs **280 million** people[2]. With approximately **65 million**[3] registered MSMEs, comprising **98%** firms being Micro, **1%** being Small, and less than 1% being Medium-sized enterprises[4], the representation of these firms seems limited. As there are about **662**[5] **SMEs** listed on the BSE SME platform, resulting in a participation rate of only **0.04%.** This occurs because the current capital markets for SMEs lack depth, particularly in the secondary markets, limiting liquidity and the availability of growth capital and discouraging more enterprises from pursuing public listings.

The critical issue that plagues SME listings is weak secondary market liquidity in which SME stocks receive low trading volumes, high bid-ask spreads, and a thin order book, which not only discourages institutions and retail investors from plugging their capital into this market but also discourages SMEs from listing their enterprises on an exchange. Problems of informational asymmetry raise adverse selection risks for investors, creating a low-growth capital drive and providing opportunities for manipulation/ pump and dump strategies. Another liquidity constrictor is a high lot size of **₹2 Lakh**[6], which limits broader retail participation, reducing buyers and sellers of the SME equity. Finally, SMEs have limited floats and, due to the previously stated issues, fewer retail investors. This microstructure causes supply-demand mismatches, which can create explosive price movements. In addition, the SME options market also experiences gamma squeezes due to hedging strategies, further lowering floats.

Strengthening MSME capital markets provides various economic benefits. A more liquid MSME market aids enterprises to raise equity, scale up quicker, and formalize their structures, therefore boosting India's GDP, increasing jobs, and empowering innovation. For FII's higher liquidity and depth creates an access to a high growth asset in the current 5th largest and potentially 2nd largest economy by 2075[7], providing opportunities for not only diversification but also long-term value. Retail investors gain transparency, better regulation/safety, fair valuations and smoother exit options rather than speculative illiquid bets. Solving the liquidity problem in the MSME space unlocks capital efficiency, strengthens investor confidence and accelerates India's transition into a more dynamic and investment driven economy.

Effective solutions to the liquidity issue in the SME secondary market would be done through engineered liquidity and reduction of asymmetric information. This can be achieved through designated market makers increasing their presence requirements which in turn narrow spreads and deepen order books[8]. The engineering of liquidity in the market can also be done by increasing anchor investors prior to listing, which could be propagated by SME's using cleaner and transparent book building. Furthermore, participation expansion can also be achieved in the secondary market by cutting market lot sizes. Finally, encouraging SME-only mutual funds, ETFs or AIFs that provide diversified exposure with small ticket sizes will also improve liquidity into the SME market.

To reduce informational asymmetry, a stronger utilization of IOSCO FR11[9] on SME financing through informational governance, structured SME disclosures and sponsored research should be done. Finally, another solution to mitigate manipulative strategies due to asymmetry of information would be done by having stricter listing norms, trade to trade settlements and higher surveillance creating a robust SME secondary market.

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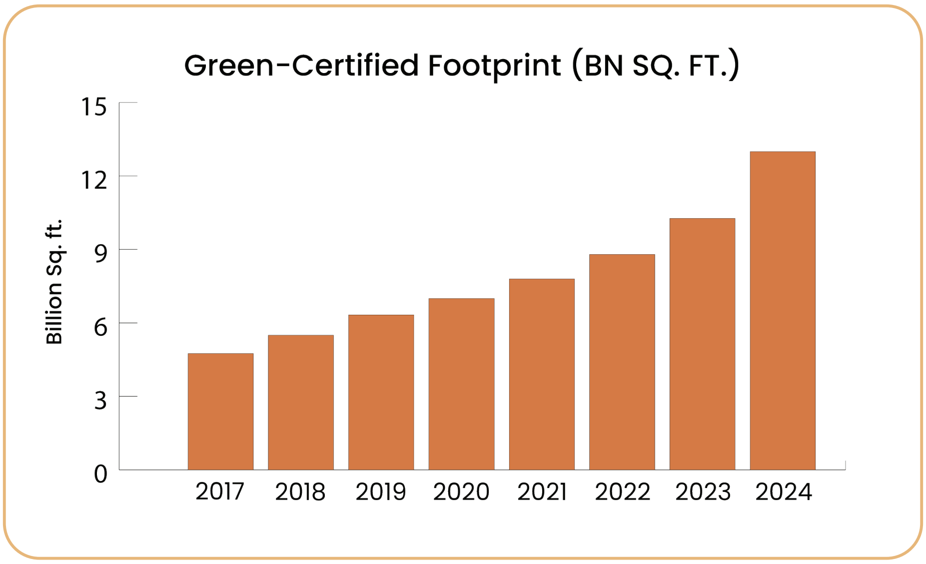
03

Green Building Revolution:

How Policy, Incentives, and Technology Are Reshaping Real Estate

The green buildings market in India is projected to hit USD 39 billion by 2025, covering commercial and residential sectors. By 2024, India exceeded 13 billion sq.ft. of IGBC-certified green space, ranking second after the U.S., with a 15.5% growth rate CAGR.



This change in the Indian Real Estate sector, which accounts for approximately 40% of the country's energy use, has been driven by policy support, incentive schemes, and mandatory compliance measures at various levels of government since 2005, in line with climate goals and evolving market sentiment.

2007
The First Energy Conservation Building Codes (ECBC) for commercial buildings was launched powered by the Energy Conservation Act, 2001

2008
National Action Plan on Climate Change (NAPCC) & National Mission for Enhanced Energy Efficiency (NMEEE) integrated buildings into the national climate strategy

2013
First national-level FAR incentive explicitly linked to a green rating; states adopted with a recommended 1-5% extra FAR for GRIHA projects over 3,000 m².

2013 +
Central & state-level incentives to IGBC/GRIHA/LEED projects with FAR boosts (3-15%), fee and tax waivers.

2017
ECBC 2017 turned the code from a voluntary guideline into a de facto mandatory standard for large new commercial buildings, and 23 states notified by 2024.

2018
Eco Niwas Samhita - Residential ECBC (ENS 2018): First national energy code for housing, which helped curb cooling loads in housing.

2018 +
State-level incentives and fee waivers for green buildings include FAR discounts of 5-30%, tax rebates, and stamp duty relief, making green buildings financially attractive and profitable.

2025
Draft Green Buildings Policy, which mandates govt standards & ESG-linked incentives for new government buildings and for private developers adopting green certifications

State governments, through General Development Control Regulations (GDCR) and other measures, offer various incentives to promote green buildings, such as extra FSI of 15-30%, property tax rebates, stamp duty concessions, fee waivers, and subsidies for solar, water recycling, and energy systems. Additionally, fast-track approvals reduce clearance times by 30-40%, thereby reducing construction delays.

The shift is evident on the ground. Many developers view green building features as important competitive advantages in urban middle-income and upscale markets. The financial benefits are evident, with incentives for up to 15% extra Floor Space Index (FSI) enabling a 4-7% increase in profitability as saleable area expands without raising land costs.

Additionally, adopting technologies such as Building Information Modelling (BIM) and digital twin tools improved design efficiency, minimised energy usage, and streamlined compliance with standards. Developers and users enjoy the benefits of certified structures by IGBC/LEED/GRIHA/EDGE, which consume 20-35% less energy and 30-50% less water, resulting in savings of 2040 rupees per sq. ft. for commercial spaces and a 25-35% reduction in household electricity expenses annually.

India is clearly building greener and smarter.

However, this transformation faces challenges. The use of green materials remains difficult due to limited technical ability, unreliable supply chains, and inconsistent incentives and policies.

These challenges will be addressed in India's roadmap for reaching 25-30 billion sq. ft. of certified green footprint by 2030. This roadmap shall include regulatory support through the implementation of the Green Buildings Policy Framework 2024, and enforcement of the Energy Conservation Building Code (ECBC) 2017 and the Eco Niwas Samhita 2024 across all states. Reducing building energy demand will make green buildings a standardised norm in the Indian real estate sector, supporting India's updated Nationally Determined Contributions (NDCs) under the Paris Agreement, in which we committed to reducing emissions intensity by 45% by 2030.

In continuation of existing incentives, the recent reduction in GST slabs on green building materials and cement and standardising incentives across all states for green buildings, will boost the profitability for developers and encourage the adoption of green buildings. Furthermore, incorporating green building norms into general development control regulations (GDCR) of Tier-2 and Tier-3 cities will support the green building revolution to reach all corners of India. In addition, it is crucial that urban local bodies incorporate form-based codes into their planning frameworks to materialise meso-level energy efficiency outcomes. Furthermore, state governments introduce monitoring and evaluation guidelines for urban local bodies to measure the performance of green buildings post-construction to ensure that green building objectives are met in the long term.

Implementing this roadmap will help India not only meet its climate goals but also support our green initiatives and create jobs in the green sector.

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PRIMUS OUTREACH

04

From Traction to Transaction:

Bridging the Gap

‘From Traction to Transaction: Bridging the Gap’, held on 29 October 2025 at the Consulate General of India in New York, convened senior leaders from government, industry, academia, and policy as a pre-summit dialogue to the AI Impact Summit 2026. The discussions focused on strengthening India–U.S. collaboration in frontier technologies through initiatives like Mission 500 and iCET/TRUST, along with deep-tech co-production, responsible AI, talent mobility, and innovation financing. With India now positioned as a trusted technology partner backed by digital public infrastructure, institutional reforms, and a strong talent base, the dialogue aimed to shift the partnership into a phase of concrete execution and long-term economic and innovation outcomes.

Key Themes from Ambassador Pradhan’s Address

India–U.S. relations have built strong and lasting momentum grounded in trust, technology cooperation, and shared values. The partnership is increasingly defined by the “Four Ts” – Trade, Technology, Tourism, and Talent. India is emerging as a key global partner in areas like AI, semiconductors, resilient supply chains, sustainability, and innovation for public good. With a large and influential diaspora, strong education links, and growing participation in advanced industries, India has become a central technology and strategic hub for U.S. companies.

Figure 1: Amb. Binaya Srikanta Pradhan

Insights from Smriti Irani & Ian Steff

The discussion highlighted Trust, Technology, and Talent as the operating model needed to convert commitments into real outcomes. India’s diverse markets and languages were seen as a valuable testing ground for scalable AI and deep-tech innovation, while women-led entrepreneurship—supported through initiatives like SPARK—offers significant inclusive growth potential. For the U.S., sustaining innovation also depends on expanding STEM talent pathways and ensuring regulatory predictability.

*Figure 2: **Smt. Smriti Irani**, Former Minister of Women and Child Development*

*Figure 3: **Ian Steff,** President & CEO at mySilicon Compass / Executive Advisor to the CEO and Chairman at Ross Acquisition Corp II*

Pathways to Mission 500: Accelerating India–U.S. Trade & Investment

The Mission 500 panel laid out a clear path to achieving $500B in India–U.S. trade and investment by 2030. Speakers stressed that predictable regulation, stable tariffs, and talent mobility are now essential if private industry is expected to lead. They identified four concrete growth levers: joint supply-chain manufacturing in minerals, defence, and electronics; using U.S. DFC and EXIM tools to reduce risk for deep-tech production in India; bringing Indian MSMEs into global Tier-1 value chains through certification and technology; and simplifying immigration pathways to support high-end talent. With East Asian confidence in India rising and companies actively diversifying supply chains, the panellists argued that the moment is right to turn ambition into execution.

Figure 4: Joseph (Joe) Crowley, Former U.S. Representative, New York; Arun Venkataraman, Former Assistant Secretary for Global Markets and Director General of the U.S. and Foreign Commercial Service, U.S. Department of Commerce; Partner, Covington & Burling LLP; Sean King, Senior Vice President, Park Strategies

Education & Talent Mobility: Building the Knowledge Corridor

Talent mobility is becoming core to India–U.S. competitiveness, with education and skills treated as critical infrastructure. Expanding reciprocal credentials and industry-linked learning will ease movement, while strengthening K–12 STEM pipelines, robotics exposure, and language pathways will build the next generation of innovators. Deeper university–industry collaboration, from digital twin labs to industrial immersion campuses, will shape the future of the partnership.

Figure 5: John D'Adamo, PHD, Assistant Head of School / Head of Middle & Upper School, York Country Day School (York, PA); President, Educational Vitality Partners, LLC; Commissioner, Middle States Association Commissions on Elementary & Secondary Schools; Sridhar Gadhi, Founder & Executive Chairman, Quantela Inc.; Sonal Beri, Adjunct Associate Professor, Columbia University Graduate School of Architecture, Planning & Preservation

AI Governance & India's Future Positioning

AI governance must balance accountability, transparency, safety, and innovation, and India–U.S. collaboration is well placed to shape global standards for responsible and scalable systems. Trusted AI will rely on strong data lineage, traceability, and ethical frameworks, with sector-specific pilots in areas such as agriculture, public services, and education seen as more practical than universal, one-size-fits-all treaties.

Figure 6: Sabeen Malik, Vice President of Global Government Affairs and Public Policy, Rapid7; Amber Berry, Vice President of AI & Strategy, Middle States Association (MSA); Dr. Michael Akinwumi, Chief AI Officer, National Fair Housing Alliance (NFHA); 1. Eric Hysen | SVP, Chief AI & Transformation Officer, Legal & Corporate Affairs, Salesforce

Fireside Chat on Deep-Tech & Investment Alliance (IDIA)

IDIA's $1B+ capital pool, combined with Government of India co-investment, is designed to accelerate deep-tech innovation in areas like dual-use systems, satellites, optics, AI compute, climate tech, med-tech, and agricultural automation. To scale globally, flexible cross-border IP, data, and ownership models are needed, along with procurement-linked pilots and national testbeds that can fast-track commercialisation.

Figure 7: Vaibhav Parikh, Partner, Nishith Desai Associates,

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05

India Maritime Week 2025:

Navigating a New Era of Maritime Transformation

India Maritime Week (IMW) has grown from a policy dialogue into a global movement redefining the nation's maritime narrative. What began as the **Maritime India Summit (MIS 2016)** a platform to attract global partnerships for India's port development has, through successive editions in **2021** and **2023**, evolved into a comprehensive forum for **sustainable, digital, and collaborative maritime growth**.

The 2025 edition, held at the **Bombay Exhibition Centre, Mumbai**, from **27–31 October 2025**, represented the culmination of this journey marking India's arrival as a global maritime force under the **Maritime Amrit Kaal Vision 2047 (MAKV 2047)**. With participation from **over 100 countries**, **1 lakh delegates**, and **MoUs worth ₹12 lakh crore** across **600+ projects**, IMW 2025 was not just an event; it was a movement. Some of the notable attendees includes the **Netherlands, Norway, Sweden, Denmark, Germany, France, the United Kingdom, Japan, Singapore, and the UAE.** It showcased how India's maritime policy, infrastructure, and global partnerships have converged into a bold and cohesive blueprint for **transformation from *coastal modernization* to *maritime industrialization*.**

The **major areas of investment** included **Port Modernization (30%), Green shipping and decarbonization (20%), Shipbuilding and repair (20%), Port-led industrialization (20%), and Blue economy, skilling (10%),** reflecting India's strategic reorientation. The 12 Major ports have signed MoUs **worth ~₹8,36,251 crore**, with **Jawaharlal Nehru Port Authority (JNPA)** emerging as the frontrunner with MoUs worth ₹2,20,000 Cr, followed by Deendayal Port Authority with ₹1,80,000 Cr and V.O. Chidambaranar Port Authority with ₹90,936 Cr. The MoUs signed across India's major ports during IMW 2025 reveal a clear shift from conventional capacity creation to green-energy leadership, maritime industrialisation, and multimodal logistics expansion. Ports such as Paradip, VOC, Deendayal, and Cochin drove the green-transition agenda with massive hydrogen, ammonia, and e-methanol investments, while VPA, Chennai, and NMPA focused on industrial clusters, smart-port systems, and integrated cargo corridors.

Andhra Pradesh State Session: Powering India's Eastern Maritime Gateway

Primus Partners have been the Knowledge Partners for the Andhra Pradesh State Session at IMW 2025 positioning the state as a decisive growth engine on India's eastern seaboard, showcasing its 1,053 km coastline, deep-draft ports, integrated logistics corridors, and rapidly expanding industrial hinterland. With AP already contributing **25% of India's port capacity**, handling **31% of East Coast cargo**, and emerging as the country's **6th largest exporter (USD 20 Bn)**, the session highlighted why Andhra Pradesh is increasingly referred to as **India's Eastern Maritime Gateway**.

The discussions centred on three high-value themes **Port Operations**, **Multimodal Logistics**, and **Shipbuilding** each aligned to the state's ambition to build a future-ready maritime ecosystem. Andhra Pradesh strategically utilized this platform to showcase their distinct strategies, welcome investment and collaborations that would help position the state as a Maritime Powerhouse of the east. During the session on Port Operations, the State outlined plans to deploy **AI-driven vessel management**, **smart gate systems**, and **cost-competitive logistics models**. The State also invited partnerships from global operators to accelerate "Ports 4.0" adoption. The state showcased its **Integrated Logistics Inventory Map (AP-LINC)** a unifying governance model aggregating energy, logistics and industrial capacities into a single planning framework during the Logistics sessions. The State highlighted its ambition to become a **South Asian shipbuilding and repair hub**, aligning with India's national goal of expanding output to **0.6 Mn GT by 2030** and **4.5 Mn GT by 2047**. Multiple coastal sites including available saltpan land have been earmarked for shipyards, fabrication units and ancillary clusters. The state is also determined to establish a **Shipbuilding Incentive Framework** to attract global yards and build domestic capacity.

Why Andhra Pradesh's Blueprint stood out? - Andhra Pradesh presented a maritime strategy anchored in execution, not aspiration. The IMW paved the way for partnerships with new players in shipbuilding, shaping up industrial cities and port operations. AP was one of the very few states that focused on expanding skills focused on green shipping, ship repair, and port automation.

The Shifting focus to hosting Global Maritime Events

In the past ten years, Maritime Summits have shown that India's far-reaching reforms in the maritime sector have propelled the country into a position of significant global strength. Today, Indian Maritime Week stands as the most esteemed maritime dialogue forum in the Indo-Pacific. **Global Maritime events provide an invaluable platform to connect stakeholders, amplify the voices of innovators, and highlight the pioneering work that is shaping the future of global shipping.** Despite India's long standing maritime legacy, Indian maritime as in the last decade shifted its focus on hosting, participating, representing India at Global forums more actively to ultimately **Strengthen India's position and influence in the Global Maritime Landscape. However, it is imperative to look beyond marketing of the India Maritime Week as just an event and amplifying its underlying larger objective.**

Here is our take on learnings from IMW 2025 for an Improved, Inclusive, Impact-driven, Implementation-focused next edition.

1. **Policy focus**: India Maritime Week successfully convened stakeholders across the maritime value chain. However, there is a need for a structured **Outcome Framework**—with clear commitments, KPIs, and implementation timelines—translating the dialogue into strategic action. Key policy domains such as **shipping finance**, **maritime arbitration**, and **seafarer welfare** will need to take the centre stage considering their centrality to India's aspiration to position itself as a global maritime hub. A stronger evidence-backed approach, supported by research institutions and data-driven analysis shall create a more robust foundation for a unified policy directive.

2. **Diversified Industry focus**: While India Maritime Week offered substantial networking and knowledge-sharing opportunities, industry stakeholders necessitate the need for more **operational clarity** and **investment-aligned insights**. Discussions around port modernization, green shipping, and logistics efficiency require more focus on **bankable business models**, **incentive structures**, and **risk mitigation frameworks** that the private sector seek. Considering that the IMW is envisioned to capture the length and breadth of the Maritime ecosystem in India, there is a need for inclusion of **global shipping financiers, insurers, and technology providers**, to showcase best-in-class solutions and innovative financing mechanisms. A dedicated spotlight for **start-ups, innovation showcases, and technology demonstrations** is the critical

need in today's times to capture the momentum of maritime tech evolution in India.

3. **Maritime Workforce transformation focus**: It is imperative that India being the world's third largest suppliers of seafarers demonstrates special attention to the rapidly evolving needs of the maritime workforce. IMW would have served as a great platform to extensively discuss the **demands of the future of seafaring workforce** focused on technology-intensive environments—ranging from remote vessel monitoring to AI-enabled navigation and advanced engine systems designed for green fuels such as methanol, ammonia, and hydrogen. Although themes like attracting younger talent, reducing attrition, and expanding women's participation in maritime were discussed at IMW, there is a need for amplifying and reiterating this cause through dedicated forums and sessions. It is needless to say that the country has already made remarkable progress—evidenced by a 739% rise in registered women seafarers between 2015 and 2024. With focused attention on workforce transformation, India can build on this momentum and close the gap with leading seafaring nations such as the Philippines and Greece. Strengthening this dimension at the IMW would not only showcase India's commitment to inclusivity and future-ready talent but also help the nation step confidently into its role as a global maritime manpower leader at a time when skilled seafarers are in high demand worldwide.

IMW 2025 has helped India tell its maritime story—historical, cultural, economic, and geopolitical. It has built a coherent public narrative around India's ambition to become a major maritime powerhouse by 2047. However, accelerating India's emergence as a leading maritime power requires stronger alignment, global engagement, and **action-oriented follow-through.**

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