

MOVING THE NEEDLE

The Journey from Policy To Implementation

June 2025



TOURISTS
GO HOME



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Dear Readers



Welcome to the June 2025 Edition of Moving the Needle, where we journey through the pivotal forces shaping India and the world—across geopolitics, maritime, tourism, Sea Weed Farming, and also through Primus Outreach and Impact.

This edition opens with an incisive look at the new “AI War,” a global contest reminiscent of the Space Race, but with far-reaching consequences for education and society. The stakes are high: the outcome will redefine not just innovation, but the very way we educate and empower the next generation.

Turning to India’s heartland, we spotlight the rejuvenation of inland waterways—a strategic lever in the quest to lower logistics costs and modernize the country’s supply chain. This is more than an infrastructure story; it’s about creating a greener, more competitive economy that can stand shoulder to shoulder with global peers.

Our coverage of capital markets highlights another transformation underway: the empowerment of India’s retail investors. As market capitalization soars past \$5 trillion, the challenge is not just growth, but inclusion. We explore how a more balanced funding landscape—where capital and banks work in tandem—can fuel entrepreneurship, innovation, and long-term economic resilience.

On the tourism front, we confront a rising tide of protest against mass tourism, both globally and at home. From European cities to India’s own beaches and trekking trails, the message is clear: tourism must evolve to respect local communities and fragile ecosystems.

Our outreach section delves into the promise of seaweed farming—a sector poised to touch a million lives. With the right mix of policy support, investment, and farmer empowerment, India’s coastal regions could become global leaders in this sustainable industry, driving growth in food, pharmaceuticals, and beyond.

Finally, we also share snippets of launches from the WAVES Summit 2025 that was organized by the Ministry of Information & Broadcasting, Government of India where Primus Partners served as the knowledge partner for the AVGC and OTT pillar of the summit.

Each story in this issue is a window into the challenges and opportunities of our times. Together, they paint a picture of a nation—and a world—at the crossroads of change, where bold ideas and collective action can create a more sustainable, inclusive, and innovative future.

We invite you to read, reflect, and join the conversation.



01 | Geopolitics

WARFAIR

It isn't uncommon to hear the term "AI War", likening countries' eagerness to be at the helm of AI development and adoption, to the Space War of the 1960s. The AI War – primarily between the US and China - has permeated every sector, including the education sector. This has seen these countries investing in AI in education in two ways - legislation and technology development.

In terms of technology development, China and the US have faced off on more than one occasion. OpenAI's ChatGPT offered a whole new realm of learning to students that had never been offered before, when DeepSeek- R1 was released, which seemed to outperform the highly funded and renowned OpenAI brainchild. While people appreciated DeepSeek's heightened functionality and utility in academia, the model was met with questions about censorship and privacy, reflecting long-held beliefs about Chinese products. They were also accused of copying ChatGPT's model, inciting a substantial online debate comparing both tools, even going so far as to cite the old adage alluding to the US's inclination to innovate and China's to replicate. In turn, the US was forced to take stock of the fact that a state-backed, open-source, free tool was pulling ahead of their own, much more expensive tool.

With legislation too, the two big names went head-to-head. In April 2025, President Trump's latest Executive Order on Advancing Artificial Intelligence Education for American Youth revealed in its scope, an intention to promote AI literacy in K-12 education to "remain(s) a global leader in this technological revolution". However, with this growth complex threats are also increasing.

India ranked among the top ransomware targets in the Asia-Pacific region in 2023, with critical sectors like manufacturing and healthcare under frequent attack. Phishing techniques also have evolved with the use of AI. Cyber fraud involving digital payments also continue to grow. In FY 2023–24, high-value cyber frauds in India amounted to over ₹166 crore. The abuse of platforms like UPI, through fake apps and malicious QR codes, reflects the evolving nature of digital vulnerabilities.

A few weeks prior, China revealed its policy to mandate AI literacy in primary and secondary schools. It is likely that the US's Executive Order was a direct response to China's policy. With the neck and neck competition for being at the forefront of AI development, the competitive net even encompasses regulatory and policy initiatives.

India and the EU have also been making efforts to boost AI literacy. In India, as part of the Union Budget for 2025–26, the government has allocated ₹500 crores to support the integration of AI from early childhood education to advanced research through the newly created AI Centre of Excellence in Education. The European Commission and OECD are working together to develop an AI literacy framework for primary and secondary education.

As China and the US gear up for the next big tech war, China is no more a replicator, but an innovator. This means it has considerable leverage in other aspects of its relationship with the US, including in the ongoing trade war. For countries that may not have the resources to develop AI tools, the best bet to remain relevant in the conversation on AI in education would be to create legislation mandating AI literacy. The AI War will redefine not just technology, but how nations educate and empower future generations.

02 | Maritime & Aviation

Rejuvenating India's Inland Waterways: A Strategic Lever to Lower Logistics Costs

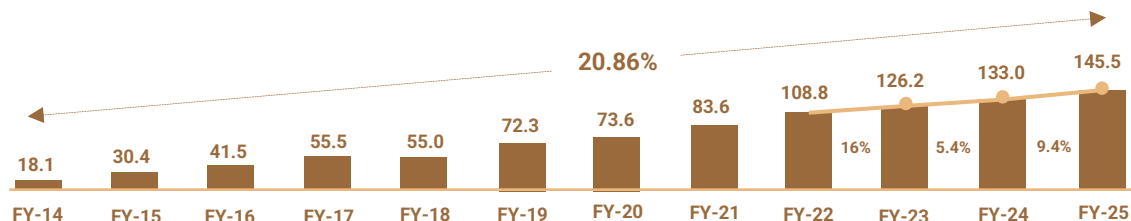
The Inland Waterways Authority of India (IWAI) achieved a significant milestone in cargo movement on National Waterways by handling 145.5 MMT in FY 2025 growing from 18.10 MMT in FY 2014, thereby reflecting a CAGR of 20.86%.

Traditionally underutilized, IWT is now gaining momentum through a comprehensive set of reforms, investments, and strategic incentives. At the forefront of this movement is the recently launched (Dec 2024) Jalvihak Scheme, aimed at providing financial incentive directly to the cargo owners for sustainable modal shift of cargo from rail / road to IWT. The ambitious initiative provides two critical benefits:

1. Financial incentive to the extent of 35% of the total actual operating expenditure incurred on National Waterways (1, 2 and 16) to the cargo owners including those traversing the Indo-Bangladesh Protocol (IBP) route.

One of the persistent challenges in inland waterway logistics has been the high cost of empty return journeys, which is often passed on to the customer, inflating overall freight rates. This initiative is a critical step toward addressing the inefficiency. By partially offsetting the operating costs it will lower the effective per-trip cost for cargo owners. Making inland waterways much more cost-attractive alternative to road and rail.

2. Scheduled cargo services between Kolkata, Varanasi, and Pandu - Scheduled services would provide visibility in terms of when you load and unload your cargo from IWT terminals. So the cargo owner can plan their first and last mile operations as well as inventory. This will help ensure operational reliability enabling better planning, inventory management, and supply chain integration for businesses.



Traffic Volumes over the years and future target (MMT)

Complementing this is the proposed Maritime Development Fund (MDF), with a corpus of ₹25,000 crore, aimed at strengthening India's maritime ecosystem, including the Inland Water Transport (IWT) sector. Structured with 49% government equity and the remaining mobilized from major ports and private investors, the MDF is designed to provide long-term, low-cost financing for critical maritime infrastructure such as shipbuilding, vessel repair facilities, terminals, and related logistics assets. For the IWT sector, the MDF offers much-needed capital support to develop a modern, efficient, and competitive fleet of inland vessels and associated infrastructure. This will enable private operators and logistics companies to invest in newer, compliant vessels and expand operations across National Waterways. By improving access to capital and de-risking investments, the MDF plays a vital role in facilitating the modal shift of cargo to IWT, which aligns with the broader goals of the National Logistics Policy.

Recognizing the importance of private sector participation, the government has notified the National Waterways (Construction of Jetties/Terminals) Regulations 2025, which lays out a clear framework for private investment in IWT infrastructure. This is expected to unlock fresh capital for terminals and jetties, making waterway-based cargo movement more accessible and efficient.

Additionally, the government is leveraging digital platforms to streamline vessel and crew registration, akin to the 'Vahan' and 'Sarathi' systems in road transport. This national portal will enhance planning, visibility, and governance in the sector. Importantly, the government is rallying over 140 PSUs to transition cargo to waterways. Ministries including Petroleum, Fertilizers, Steel, and Food Distribution have been mobilized to earmark a portion of their cargo for IWT—supporting the targets set under the Maritime India Vision (MIV) 2030.

While these measures provide a strong foundation, it is important for the government and the industry to engage and work towards operationalization of these opportunities. This engagement will be important to outline the way forward and help realize the intended benefits of these initiatives.



03

Capital Market

Retail Empowerment in Capital Markets: A Catalyst for India's Economic Growth

Indian capital markets have seen tremendous growth over the past two decades with the market capitalization of NSE surpassing \$5 trillion in 2024. This growth has been accompanied by major advancements in terms of technology, transparency, and processes that have simplified the investment process, driving retail participation in the markets and benefitting investors. However, despite growing participation, domestic retail investors often lack the resilience or diversified strategies needed to sustain long-term involvement in the markets.

To fully realize the potential of capital markets, India must encourage long-term retail participation. This will not only enhance financial inclusion but also serve as a crucial pillar for inclusive economic development.

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To fully realize the potential of capital markets, India must encourage long-term retail participation. This will not only enhance financial inclusion but also serve as a crucial pillar for inclusive economic development.



Banks vs Capital Markets: Diversifying Sources of Funding

India's corporate funding landscape is still heavily bank-centric, with businesses largely dependent on loans for capital. However, capital markets offer a vital alternative, enabling companies to raise funds through equity and debt instruments suited for long-term growth. They have been equally, if not more prominent in financing growth in developed economies.

To fully realize the potential of capital markets, India must encourage long-term retail participation. This will not only enhance financial inclusion but also serve as a crucial pillar for inclusive economic development.



In the median developed country, the equity market capitalisation as a percentage of GDP rose from 35% from 1991 to 1995 to 84% in 2006-2011. This increase highlights the reliance on capital markets for corporate financing.

India is also beginning to follow this trend as awareness of capital markets increases. A more balanced funding landscape, where both banks and capital markets play vital roles, is essential for the country's economic future.



Enhancing Retail Participation to fuel Economic Growth

Despite the substantial size of Indian capital markets, retail participation remains relatively low when compared to developed countries. This can be seen in India's equity penetration, which has grown rapidly over the past decade, the country's demat penetration at a mere 12%, especially when compared to other developed countries.

In many developed countries, retail investors actively engage in the capital markets, contributing significantly to market liquidity and price discovery. In contrast, India's retail and High NetWorth Individual (HNI) investor base still prefers to keep their savings in traditional assets like gold or fixed deposits rather than equities. Redirecting even a portion of this capital into markets could fuel entrepreneurship, innovation, and employment.



Simplifying Investment for Retail Participation

Expanding retail participation requires simplifying the investment journey. Technology has already helped democratize access, but more integrated solutions are needed. Offering a comprehensive suite of services, thereby creating a one-stop shop for retail investors will be the key to increasing retail participation. These should include the following four pillars of financial inclusion:

- **Access to capital**, enabling individuals to raise funds for their financial needs,
- **Access to investment products**, offering diversified options to grow wealth,
- **Access to insurance**, ensuring financial security, and
- **Access to investment tools**, providing the technology and resources to make informed decisions.

By simplifying the investing journey and providing educational resources, capital market players can help bridge the gap in equity participation.



Aligning India's Policy Framework for Retail Participation and Funding

India's capital markets stand at the cusp of a significant transformation. By addressing barriers to entry for retail investors and fostering a culture of long-term investment, these markets can become a pillar of economic resilience and growth. Policymakers, stockbrokers, and technology innovators must collaborate to build a robust financial ecosystem that supports both investors and businesses. This can take shape in the form of reforming the Securities Contracts (Regulation) Rules (SCRR) 1957 to keep in touch with evolving market dynamics and better align their services with the needs of a dynamic retail base.

The SCRR have played a crucial role in ensuring consumer protection and upholding market integrity. However, since these regulations were drafted in the pre-digital era, certain modifications will be required to allow stockbrokers from becoming comprehensive, one-stop financial service providers for retail investors.

If stockbrokers are not allowed to expand their role and offer diversified investment products and services under one roof, retail participation will continue to remain subdued. This reliance on traditional banking channels for funding and capital formation restricts the true potential of India's markets. To break this chain, policy reforms must aim to provide stockbrokers with the tools to be able to bridge the gap between retail investors and capital markets. This will enable stockbrokers to encourage greater participation, mobilize domestic savings into investments, and foster a more inclusive and resilient capital market ecosystem.



A photograph of a city street with people walking and a wall with graffiti in the background. The graffiti reads "TOURISTS GO HOME".

04

Tourism

When Paradise Protests: The Rising Tide Against Mass Tourism

Across Europe, a wave of discontent is rising against mass tourism. From the narrow streets of Barcelona to the canals of Amsterdam, citizens are voicing frustration with the strain that tourism places on infrastructure, ecosystems, and local life. Amsterdam has witnessed campaigns like **"Stay Away,"** directed at tourists, causing nuisance and troubling local way of life. This digital campaign is nothing but a regulatory measure to curb party tourism aimed at discouraging unruly and disrespectful visitors. Meanwhile, Spain has also seen large-scale protests demanding limits on tourist inflows. These expressions of "tourism fatigue" reflect deeper concerns about sustainability, respect for local communities, and environmental protection.

India, too, is beginning to see early signs of this discontent. In Goa and the Konkan region of Maharashtra, sporadic protests have emerged against overcrowded beaches, noise pollution, unchecked littering, and disregard for local traditions. The problem is no longer limited to over-touristed urban centers—remote natural areas are now under strain as well.

Environmentalists are particularly alarmed by the impact of adventure tourism. Last year, the Forest Department announced a temporary shutdown of all offline trekking routes in Karnataka. The decision comes amid rising concerns over the degradation of the State's 23 officially recognized hiking trails, especially in ecologically sensitive regions like the Western Ghats. Trekkers often leave behind piles of plastic waste—wrappers, bottles, and other non-biodegradable items—that threaten local biodiversity. As reported by Deccan Herald, the move aims to ensure that these fragile zones are not overrun by getaway seekers and highlights a needed shift toward regulating nature-based tourism.

Globally, governments are starting to act. Hawaii has implemented a climate tax on tourists, specifically designed to fund environmental protection and enhance climate resilience. This initiative sends a clear message: tourism must transform into a force that supports environmental solutions rather than contributes to the problem.

India needs to respond proactively to address this. First, it needs to build a robust data system to track tourist footfall, travel trends, environmental impact, and capacity thresholds. In-depth data analysis can help policymakers to undertake informed regulatory measures. Second, there must be a systemic shift toward responsible tourism—one that respects both ecology and local culture. Third, empowering local communities needs to be done as soon as possible so that they will not be just service providers but also decision-makers. Local governance units like Gram Panchayats should have the authority to regulate visitor flows and set boundaries. While India has long embraced the idea of Atithi Devo Bhava—treating guests as divine—it's crucial that we also empower local communities to set boundaries and say, "Tourism should be welcomed, but it must respect our limits and our way of life."

Fourth, tourists themselves must be part of the solution. Their involvement in beach clean-ups, eco-volunteering, or heritage conservation can foster a deeper sense of accountability. Tourism messaging should shift from consumerist slogans to conscious living: **"Leave only mind prints, not carbon footprints."** Instead of trails of trash that shout "we were here," tourism's legacy must be one of care and respect.

With the right steps, India can shape a future where tourism thrives in harmony with nature and local communities—sustainable, inclusive, and proud.



05

Primus Outreach & Impact

Report on Seaweed Farming can touch a million lives



Primus Partners recently released a report **Seaweed Farming can touch a million lives**. Here are the key insights with the potential to positively impact industries such as food, pharmaceuticals, cosmetics, biomaterials and agriculture:

- India's seaweed sector, estimated to be worth ₹200 crore in 2022, could surge to ₹3,277 crore within the next 10 years.
- When the potential of seaweed cultivation is fully tapped, 1.6 million lives can be positively impacted by seaweed farming.
- India's diverse coastal regions, including Maharashtra, Tamil Nadu, Orissa, Goa, Gujarat, Lakshadweep, and the Andaman & Nicobar Islands, present untapped potential for large-scale seaweed farming.
- The market growth does face challenges – both for farmers and buyers. Buyers have concerns around seed quality, logistics, contract farming uncertainties, etc. Farmers on the other hand have low awareness of the possibilities, and suffer from poor market linkage.
- The Government must establish a concrete roadmap in the coming years, focussing on three key areas: infrastructure development, policy support, and market access to achieve a strong seaweed value chain.



What can the Government do, to promote Seaweed Farming?

- Encourage Investments and Enhance Buyer Engagement
- Strengthen and build more onshore and offshore seed bank facilities
- Streamline Policy around Land Leasing and Contract Farming of Seaweed
- Establish seed multiplication centres (hatcheries)
- Establish a Micropropagation Facility
- Resolve concerns around Kappaphycus
- Build farmer capacities – through FPOs



06

Primus Outreach & Impact

Waves Summit 2025

The WAVES Summit 2025 was organised by the Ministry of Information & Broadcasting, Government of India and Primus Partners served as the knowledge partner for the AVGC and OTT pillar of the summit. Held at the Jio World Convention Centre, Mumbai, the summit brought together leaders and eminent personalities from the Hollywood, Bollywood, media, entertainment, technology and policy ecosystems.

The Summit featured a distinguished group of participants from Hollywood, Bollywood, government, industry, creative sectors and academia. These included: Mr Gaurav Dwivedi, CEO, Prasara Bharati, David Unger, CEO, Artists International Group, William Pfeiffer, Co-Founder, Globalgate Entertainment, Pankaj Gupta, Head, Public Sector –

AWS India, Sudhir Chaudhary, Senior Journalist, Avinash Pandey, Former CEO, ABP News, Amala Akkineni, Actor and Director – Annapurana Films and Media School, Rituparna Sengupta, Kriti Kharbanda, Isha Talwar – Famous Bollywood personalities, Sandeep Marwah, Founder, Asian Academy of Film & Television (AAFT) and Marwah Studios, Sajan Raj Kurup, Founder, Creativeland Asia and many more.

As the knowledge partner, Primus Partners curated key sessions focused on gaming, AI, and state-led ecosystem development; enabled strategic exchanges between government and industry; and helped define pathways to a future-ready AVGC-XR ecosystem. focused on gaming, AI—reinforcing its commitment to shaping India's creative economy.



Primus Curated Sessions at WAVES Summit 2025



Powering Play: AI and the Future of Gaming Skills in India's Digital Economy

This panel explored how Artificial Intelligence is transforming the gaming value chain—from real-time personalisation to intelligent NPCs and dynamic storytelling. With India's gaming market poised to touch \$9.1 billion by 2029 and over 591 million gamers, the discussion underscored the urgent need to build an AI-ready workforce. Eminent voices from academia, industry, and government debated the skilling pathways and policy frameworks required to position India as a leader in AI-led gaming innovation.

The panel explored how Indian states are emerging as catalysts for the gaming economy by formulating progressive policies, launching targeted skilling programs, and developing world-class infrastructure.

Panelists discussed the key ingredients required for a structured roadmap for creating a world-class gaming ecosystem, whether it is the creation of dedicated gaming policies, incubators, IP frameworks, and esports ecosystems that empower local studios to scale and compete globally. They emphasized the importance of state-driven innovation in nurturing talent and attracting investment.

Bringing a global lens to the conversation, NVIDIA highlighted the transformative role of emerging technologies such as agentic AI, accessible GPUS, and AI-powered content creation tools, which are redefining game design, development workflows, and personalised player experiences.



Levelling Up: State Roadmaps for a World-Class Gaming Industry

As India's digital-first population drives exponential growth in the gaming sector, a high-impact session at WAVES 2025 brought together key decision-makers, including the Secretaries of IT from Rajasthan, Telangana, and Madhya Pradesh, along with industry leaders from NVIDIA and MPL.



'OTT & Digital-Driven Democratisation of Content Creation and Consumption', was organised by Primus Partners in collaboration with AWS.

Curated as a thematic deep-dive across three focused sessions, the Roundtable brought together global voices from Hollywood, Bollywood, industry, media and technology to chart the next leap for India's digital media and entertainment sector. The discussions explored synergies between public initiatives and private innovation, avenues to scale Indian storytelling for global audiences and how cutting-edge technologies like AI, cloud, VFX and AR/VR are reshaping content creation and monetisation. With an emphasis on inclusivity, multilingual reach and future-ready revenue models, the Roundtable did set the stage for actionable collaborations and visionary thinking in India's rapidly evolving OTT landscape.



Theme 2:
Scaling Indian Media Content for Global Markets & Innovative Monetisation Models in the OTT Ecosystem

The discussion explored India as a viable option to become a hub for the Cross-border entertainment industry for syncretic content production through strategic funding, tech adoption and policy support and what projects can fetch investments.



Theme 1:
Public-Private Collaborations for Developing India's OTT Ecosystem & Hyper-Localisation of Content

The discussion explored bridging government initiatives, policies and private sector capabilities to create an expansive and feasible OTT landscape. Potential of a public-sector OTT platform to serve as a vehicle for linguistic diversity, infotainment and public outreach. Giving space to new talent and the creator ecosystem.



Theme 3:
Role of Emerging Technologies & AVGC in Optimising OTT Landscape

The discussion examined how AI, cloud solutions, VFX, AR/VR can revolutionise content creation, distribution and user engagement. Job opportunities being created by usage of emerging tech in M&E sector. Mechanisms for creating and distributing inclusive, diverse, affordable, engaging content for a multilingual audience.



Highlights and Announcements that came out from the Roundtable



Launch announcement of a Marathi OTT platform by the Government of Maharashtra, showcasing regional language innovation, this was announced by Sh Ashish Shelar, Hon'ble Minister of Culture, Heritage & IT, Government of Maharashtra.



Signing of an MoU between Andhra Pradesh Tourism Development Corporation and Creativeland Asia, with the presence of **Smt. Amrapali Katam – MD AP Tourism Department, Sajan Raj Kurup** and global advisors **David Unger** and **William Pfeiffer**, aimed at positioning Andhra Pradesh as a global media and production hub.



Thought Leadership Reports

Primus Partners also launched two flagship reports at the Summit:

➤ **India's \$9.2B Gaming Boom: Powered by 591M Players and AI"**

In collaboration with the **Game Developer Association of India (GDAI)**, Primus unveiled a landmark white paper decoding the transformative potential of AI in the Indian gaming industry. The report outlined how AI is reshaping game development, unlocking intelligent characters, and creating deeply personalised gameplay experiences. It highlighted India's 1,900+ gaming studios employing 1.3 lakh professionals and emphasized the importance of ethical AI integration, skill development, and inclusive design.



Highlights and Announcements that came out from the Roundtable

- India's gaming industry is valued at \$9.2 billion in 2025, supported by 591 million gamers and over 1,900 gaming companies.
- Artificial Intelligence is reshaping the gaming value chain—from intelligent NPCs and procedural storytelling to real-time personalization and asset generation.
- India's young, mobile-first user base and growing developer ecosystem position it as a potential global leader in AI-led game development.
- AI is accelerating creativity, development cycles, and player immersion across game formats and platforms.



Key Findings

- **AI adoption** in game development is moving from experimentation to essential integration.
- **66.7%** of startups report **funding constraints**, particularly for AI-based gaming projects.
- **44.4%** of respondents lack access to **mentorship and industry networks**; **31.1%** struggle with marketing and user acquisition.
- Despite its scale, the industry faces a **shortage of AI-skilled talent** and limited access to **cloud compute and datasets**—especially for indie developers.
- There is a growing concern about the **lack of Indian cultural narratives** in AI-generated gaming content.



The Way Forward

- Establish **dedicated AI skilling pipelines** for gaming, including integration in design, art, and coding curricula.
- Develop **investment and incubation support** for AI-first game studios, especially at the regional and cluster level.
- Foster **cross-disciplinary collaboration** between creative artists, developers, and AI researchers.
- Create a **regulatory sandbox** for responsible AI experimentation in gaming—balancing innovation, ethics, and data safety.
- Promote **Indian storytelling and culture** through localized, AI-enabled gaming IPs that resonate globally.

➤ “Press Play: India’s OTT Goes Global”, jointly developed by AWS and Primus Partners.

“Press Play: India’s OTT Goes Global”, jointly developed by AWS and Primus Partners. Mr. Ashish Shelar, Hon’ble Minister of Culture, Heritage & IT, Government of Maharashtra, launched the report.



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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

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representing the Primus collective, where each individual matters

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for building a better tomorrow



PRIMUS PARTNERS®

Solutions for Tomorrow

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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