PRIMUS RESEARCH | PRIMUS PARTNERS® Solutions for Tomorrow

Moving the Needle

April 2026 Edition

Table Of Contents...

The financial year is over, the balance sheets are tallied, and appraisals delivered. What replaces that familiar tension is something at once quieter and more consequential: it is the preparation of the year ahead!

The new financial year is not simply a continuation; it is for commitments as well. Strategies drafted in Q4 must now reach fruition in Q1. This edition of Moving the Needle steps into that opening with purpose. The articles crafted this month discuss some of the most pertinent issues and how AI is transforming the way we address them.

- The article on AI-driven climate action examines how India is deploying technology not as a futuristic ambition but as a current operational tool across thermal power plants in Chhattisgarh to flood-vulnerable plains in Bihar.

- Similarly, the article on AI in India's judiciary reflects a quieter but equally profound shift. With 5.49 crore pending cases, the justice system's challenge is not one of will but of capacity. The article identifies how AI can be judiciously used in easing this escalating burden.

- The "Phygital" workplace has moved well past the experimental phase. Five years after the pandemic forced the experiment, hybrid and flexible work models have become the baseline expectation for India's workforce. FY27 will separate organizations that have merely accommodated this shift from those that have genuinely evolved around it.

- Finally, our coverage of the Primus Partners–ApplyBoard MoU signals something important about where India stands in the global education economy.

For Primus Partners, April represents the renewal of a commitment we carry into every engagement: that the most valuable contribution we can make is to help institutions not just respond to change but shape it. The partnerships we have built, the summits we have convened, and the policy conversations we have helped advance over the past year are not conclusions; they are foundations for our growth.

— The Editorial Team, Primus Partners

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01

AI-Driven Climate Action:

Tackling India’s Environmental Challenges Through Technology

India stands at a defining crossroads in its climate journey, where the scale of environmental stress collides with the speed of technological change. From choking urban air and disappearing groundwater to climate-vulnerable coastlines and heat-stressed agriculture, the country's challenges are vast, complex, and deeply interconnected. Yet, for the first time, India also has an unprecedented opportunity: to deploy artificial intelligence not as a futuristic add-on, but as a core instrument of climate action. When intertwined with policy intent, local data, and community participation, AI can shift India's response from reactive crisis management to anticipatory, precision-driven solutions, turning climate risk into a catalyst for resilience, equity, and sustainable growth.

Moving Beyond Retrospective Climate Management

Historically, climate action in India, across both public and private sectors, has relied heavily on retrospective data: annual inventories, manual reporting, and post-facto assessments. While disclosure frameworks and action plans have expanded, they often remain disconnected from day-to-day operational decisions. This gap is evident in sectors such as power, manufacturing, buildings, and urban services, where emissions and resource use are still managed after the fact rather than optimised in real time.

AI enables a decisive shift. By analysing continuous streams of data from sensors, satellites, smart meters, and operational systems, AI can detect inefficiencies, forecast risks, and recommend interventions before environmental damage or resource loss occurs. This transition, from reporting to real-time control, is essential for India to align its development trajectory with its long-term climate goals.

Talking about shifts, AI-driven Digital Twins mark a decisive turning point. By creating living, virtual replicas of physical assets, supply chains, and buildings, continuously fed by sensor data and powered by artificial intelligence, India can move from observing emissions to actively controlling them. AI enables these systems to detect hidden inefficiencies, predict failures before they waste energy, and simulate what-if pathways that optimise cost, carbon, and resilience simultaneously. In this model, sustainability is no longer a cost of doing business, but a driver of efficiency, competitiveness, and long-term climate leadership for India.

Power and Industry: Optimising Emissions at the Asset Level

One of the most compelling applications of AI in India has emerged in the power sector. In thermal power plants, AI-enabled digital twins are being used to monitor heat rates and combustion efficiency in real time. By identifying subtle thermodynamic losses that are invisible to manual monitoring, these systems allow operators to fine-tune boiler operations instantly, reducing coal consumption per unit of electricity generated and cutting emissions without compromising grid reliability. This approach is particularly relevant for coal-dependent states such as *Chhattisgarh, Odisha, and Jharkhand*, where incremental efficiency gains across large fleets of plants translate into significant reductions in carbon emissions and costs.

Buildings and Cities: From Reactive Control to Predictive Efficiency

India's cities are on the frontline of climate risk, particularly heat stress and air pollution. Buildings alone account for a rapidly growing share of electricity demand, driven largely by cooling. Traditional building management systems respond only after conditions change, switching on cooling once temperatures rise or occupancy increases. AI transforms this paradigm. In cities such as *Hyderabad, Bengaluru, and Pune*, advanced building management platforms now integrate weather forecasts, occupancy patterns, and user comfort preferences to proactively manage HVAC and lighting systems. Cooling loads are adjusted before peak demand hits, reducing both emissions and strain on urban power grids.

In Telangana's agricultural belt, the Saagu Baagu (Agricultural Advancement) project illustrates the benevolent face of AI. Partnering with global forums, the state deployed AI tools to support chili farmers. By analysing soil health and weather data, the system provided precise, timely advice on pesticide and fertilizer usage. This led not only to environmental protection through reduced chemical load but also to a 21% increase in yields. Here, AI acted as a bridge between climate science and traditional farming wisdom.

Similarly, in the flood-prone plains of *Bihar*, the Google Flood Hub initiative has used AI to process satellite imagery and hydrological data to forecast floods up to seven days in advance. But the technology didn't stop at the server. It relied on trans-intermediaries, village volunteers, to interpret these alerts and warn their communities. This human-in-the-loop model saved livestock, assets, and lives. It proved that high-tech intelligence works best when delivered through high-trust human networks.

From Intent to Intelligent Action

AI will not solve India's climate challenge on its own. But when embedded into policy, infrastructure, and markets, it can dramatically increase the effectiveness of every rupee spent and every tonne of emissions reduced. The transition India needs is not just green, but intelligent, one where climate action is guided by real-time insight, predictive capability, and systemic optimisation. States that embrace this shift early will not only reduce risk but position themselves as leaders in a low-carbon, technology-enabled future.

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02

Using AI to Support Judicial Efficiency While Preserving Judicial Discretion

Indian courts are currently managing a significant caseload, which requires the adoption of innovative strategies to sustain the efficiency of justice delivery. According to NJDG data cited in Parliament, India had 5.49 crore pending cases across all courts as of 8 December 2025. Each pending case represents an individual awaiting their hearing, in accordance with the principles of natural justice and their fundamental rights. For nearly a century, Indian courts have relied on the dedication of judges, registries, and clerks, often working without digital tools. However, the increase in litigation has exceeded the capacity of manual processes. The system is not broken, but it is overburdened. The primary challenge is not judicial will but limited judicial time. As we stand at this precipice, Artificial Intelligence (AI) offers a bridge. But as we cross it, we must ensure that in our rush for speed, we do not leave behind the most vital component of justice: judicial discretion.

It becomes pivotal to understand that AI models can only be deployed within a constitutional order that protects open justice, fair trial, and decisional independence. Carrying out laborious tasks without compromising judicial rationality becomes the need of the hour. Keeping this in mind, India's Supreme Court now pilots an NLP-driven portal, Supreme Court Portal for Assistance in Court Efficiency (SUPACE), that scans filings for relevant precedents, "saving time and improving the quality of adjudication". Another system named Supreme Court Vidhik Anuvaad Software (SUVAS) automatically translates judgments into regional languages, reinforcing the Court's view that access to information is an essential facet of justice.

Machine learning can also triage case dockets. Algorithms can flag urgent matters for priority listing, cutting delays in sensitive disputes. Across jurisdictions, AI analytics can detect systemic bottlenecks and suggest resource reallocations, for instance, identifying judges or court units that are persistently overworked. These assistive systems complement, rather than dictate, judicial reasoning. Indeed, global legal research platforms like ROSS and LexisNexis already use AI to surface key precedents in seconds, and SUPACE performs a similar service for India's docket.

Even in Germany, for instance, courts with huge backlogs have tested an AI assistant called OLGA. OLGA categorizes filings and extracts key data to help judges quickly find relevant text. Stuttgart judges reported that OLGA's summaries allow them to skip repetitive document review and focus on novel legal issues, and the court estimates that case processing could be reduced by over 50%. These jurisdictional case-studies show that AI can speed up court administration in practice, easing procedural burdens while human judges retain final decision-making.

Efficiency increases manifold when AI is introduced into judicial decision-making. Can algorithmic analysis supplant judicial reasoning and save time on trials as well? In March 2023, this tension materialized in the Punjab and Haryana High Court during the bail hearing of Jaswinder Singh. The petitioner, accused of a brutal assault, sought bail. In a historic move, Justice Anoop Chitkara consulted ChatGPT, asking a jurisprudential question "What is the jurisprudence on bail when the assailants assaulted with cruelty?".

The AI responded with a cogent summary: cruelty is a valid ground for denying bail if there is a flight risk or danger to society. Justice Chitkara denied the bail. But the significance of this moment lay not in the denial, but in the disclaimer. The Court explicitly stated that the AI was a reference tool only, a digital treatise, and that the decision was grounded entirely in the judge's own application of mind. The AI did not decide; the judge did. This distinction is the firewall that protects our constitutional values. An algorithm can calculate the probability of recidivism based on data, but it cannot understand the concept of redemption. It can parse the text of a statute, but it cannot weigh the unique, human circumstances of a plea for mercy.

If Jaswinder Singh showed us the potential of AI as an assistant, the case of Christian Louboutin vs. The Shoe Boutique in the Delhi High Court showed us its limits. In this trademark dispute, the plaintiff's lawyers submitted a ChatGPT-generated response as evidence that Christian Louboutin had a unique reputation for spiked shoes. The AI had confidently asserted that Louboutin was indeed known for this style. But Justice Prathiba M. Singh was unimpressed. The Court conducted its own query, exposing that the AI could easily list other brands with similar styles, undermining the claim of exclusivity. The Court's ruling was sharp and necessary; AI cannot be a witness. It can sometimes hallucinate facts and invent precedents. Thus, it becomes pivotal to establish that AI, should be used to strictly supplement the human judge rather than supplant it when it comes to using legal reasoning and rationality.

To ensure that the judicial mind remains paramount, safeguarding the privacy of each case, a codified framework for judicial AI is essential. Internationally, ethical charters are emerging. The IEEE's Global Initiative and the Council of Europe's CEPEJ have proposed principles for "trustworthy AI" in courts, emphasizing explainability, fairness and oversight. Indian policy experts reach similar conclusions. In July 2025, Kerala introduced India's first judicial policy regulating the use of AI in District Courts: "Policy Regarding Use of Artificial Intelligence Tools in District Judiciary" mandating that AI serve solely as an assistive tool, explicitly prohibiting its use for judicial decision-making or legal reasoning. This policy prioritises the need for human oversight to ensure transparency, accountability, and the protection of confidentiality in judicial processes, alongside directing the recording of audit trails for every use of AI.

Even with this progress, we have to tread carefully. If left unchecked, algorithms could simply repeat historical biases, and opaque "black-box" systems might violate a litigant's fundamental right to understand how a decision was reached. To tackle this, there must be a mandate that every AI interaction be logged for auditability, and newly introduced tools should undergo independent bias and security audits to improve accountability.

If these guardrails are in place, AI can truly enhance judicial efficiency without eroding discretion. By shouldering preliminary clerical work, it lets judges devote more effort to reasoning. Any AI, used for public welfare must be anchored on explainability and traceability. With principled governance and ongoing oversight, AI could help achieve faster, data-driven justice while honouring the human values at the core of our legal system.

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03

The Phygital Shift:

How India's Workplaces Are Quietly Being Redesigned

Five years on from the pandemic, it's interesting to look back at how rigidly we once defined "going to work." This world hasn't just changed for millions of employees across India; it has been replaced by something far more fluid.

So, What Even Is "Phygital"?

Phygital is bringing together physical and digital technologies to make a work environment that is efficient and connected. For instance, in the human resources sector, a phygital experience combines traditional face-to-face interactions with new virtual platforms, helping improve HR effectiveness while retaining the personal touch.

What's Working!

The phygital platform offers many benefits for both employees and management. After 2020, people's offices shifted to their homes. But the phygital workplace is a broader idea. It is about redesigning how businesses operate so that physical presence is no longer the only option.

Tools like MS Teams Meetings, Zoom Calls, and SAP portals became lifelines during the pandemic. Companies that invested in these platforms saw something unexpected: productivity didn't collapse when people weren't in the same room; it improved. Phygital systems also help businesses gather and analyse information about how their work is done. This helps them make better choices and increases productivity. Businesses learned more about what employees like and how to customise customer experiences.

Hiring became less constrained by geography. Companies can now hire people from different cities or countries. It helps make things more diverse and lets businesses grow faster. For HR teams especially, the phygital model has forced a rethink. Digital portals handle the paperwork. Chatbots field the repetitive queries. Analytics tools flag attrition risks before managers even notice a problem brewing. The humans in HR are, in theory, freed up to do the things that actually require a human.

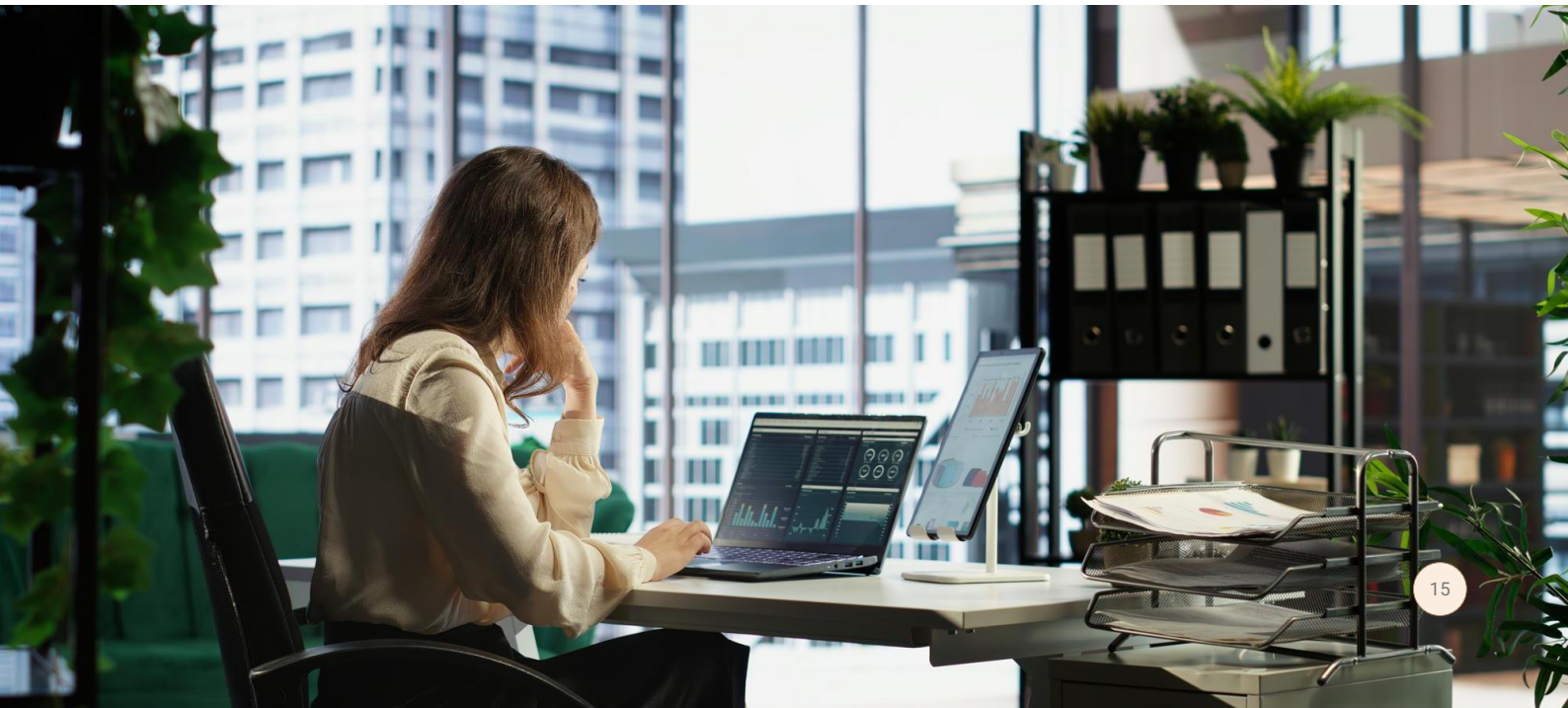
The Technology Underneath

Smart technology doesn't just support the phygital workplace; it's what binds it all together.

AI has quietly threaded itself through most of this. It works with the recruitment software, learning management systems, and performance dashboards. AI enables businesses to automate regular tasks, analyse data, etc. AI chatbots help screen profiles, answer employee questions, and provide automated HR services.

AI is also used alongside other technologies, such as augmented and virtual reality, across many fields to improve training and help employees transition to digital workspaces for virtual training and collaboration. HR analytics tools help make better decisions by showing trends in HR and employee behaviour.

The phygital workplace has changed how businesses work today. Studies show that when used correctly, phygital systems can significantly enhance employee engagement, bridge recognition gaps, and create a more connected and productive work environment.



What Doesn't Come Easy

The phygital workplace has genuine advantages but pretending there are no real costs would be misleading. Data security is the most pressing. The more a business moves onto cloud platforms and digital workflows, the larger its attack surface becomes. A data breach in a phygital environment isn't just a technical problem; it can expose salary details, performance records, health information, etc. Companies, particularly mid-sized ones, often underestimate the cybersecurity investment this model demands.

Then there's the quieter problem of employee wellbeing. The always-on nature of digital work doesn't stay at the office, because there is no office to leave. For some workers, flexibility has translated into an expectation of constant availability. Burnout, screen fatigue, and blurred boundaries between personal and professional life are not hypothetical risks they're showing up in employee surveys across industries.

Perhaps the trickiest challenge is cultural. Organisations spend years building a particular identity, the way a team celebrates a win, the informal conversations that build trust, the instinct to walk over to a colleague's desk when something feels off. Phygital models can, if poorly managed, quietly erode all of this. Culture doesn't maintain itself through a Teams channel.

Where Does This Leave Us?

The phygital workplace isn't a trend that surprised us; it's the result of years of pressure, a pandemic that forced the experiment, and a workforce that quietly decided it preferred the new arrangement. Five years on, it's not going back. The numbers reflect this honestly. According to Reports, more than 85% of employees prefer flexible work options, indicating a clear shift in workforce expectations. Multiple studies also show that 74% of organisations plan to permanently adopt hybrid work models. Visibly phygital is not just a short-term trend but a long-term change.

The phygital shift is real; it is already getting implemented across every major sector. The functionality and use across sectors are different, but the core logic holds everywhere. To grow in a way that lasts longer, the real test of a phygital organisation isn't the technology it uses; it's whether the culture stays strong, the data stays protected, and the people stay genuinely supported.

For India, the stakes feel especially real. Infrastructure and policy matter, but at the end of the day, a nation's progress moves at the speed of its workforce. Phygital models, when they are implemented with some care & support. They open opportunities, reduce friction, and give companies the reach to grow in ways that weren't possible before. The companies that get this right won't just be the ones with the best technology. They'll be the ones who remember the technology exists to serve the people using it, not the other way around. This will lead to success in the changing world of work.

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04

Primus Outreach

Primus Partners X ApplyBoard:

Catalysing India's Global Education Ambitions

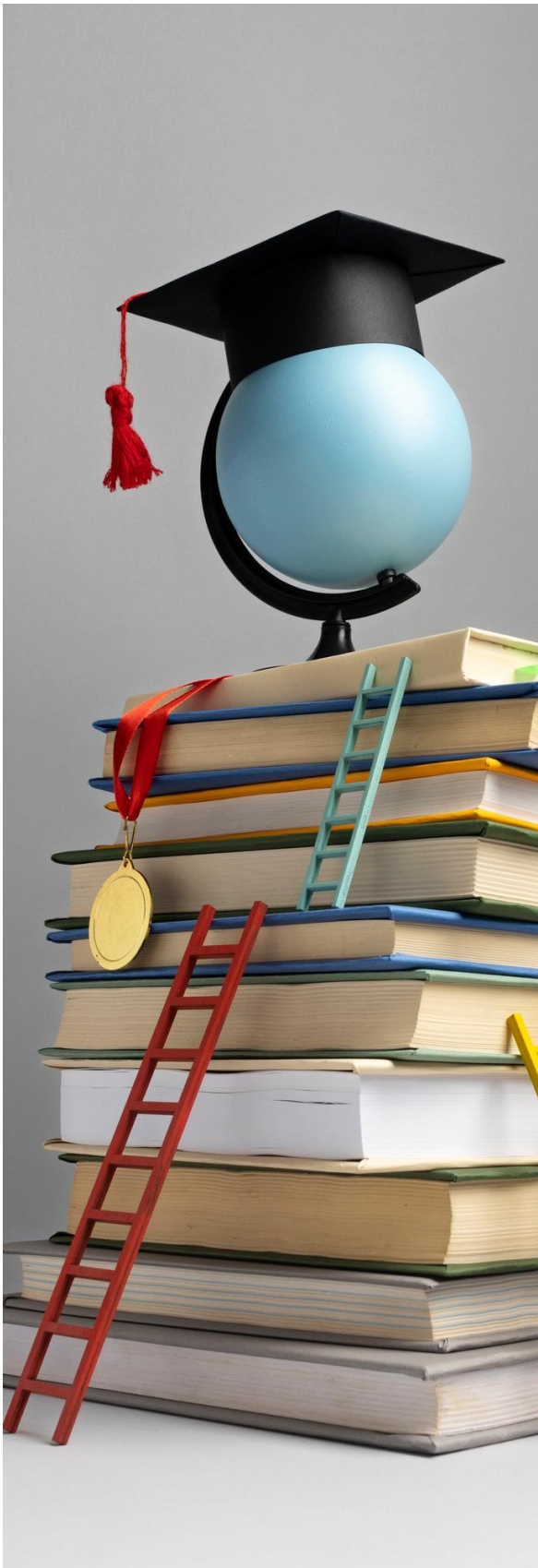
The Memorandum of Understanding (MoU) between Primus Partners and ApplyBoard represents a strategic, forward-looking collaboration to strengthen India's position in the global higher education ecosystem.

At a time when international student mobility is undergoing significant transformation, this partnership brings together complementary capabilities—*Primus Partners' deep expertise in policy advisory, institutional strengthening, and system-level reform, alongside ApplyBoard's robust global platform for student recruitment and mobility*. Together, they signal a shared commitment to advancing cross-border education flows while positioning India as an emerging hub for global learners.

The global higher education landscape is witnessing a shift. Traditional destinations such as the United States, the United Kingdom, Canada, and Australia continue to attract large numbers of international students, but new geographies are increasingly entering the conversation. Factors such as rising costs, visa uncertainties, and evolving geopolitical dynamics are prompting students to explore alternative destinations that offer quality education, affordability, and cultural richness.

India, with its scale, diversity, and growing institutional capacity, is uniquely positioned to respond to this shift. The **Primus–ApplyBoard MoU** is therefore not merely a bilateral agreement; it is a timely intervention aligned with broader global and national trends in higher educational institutions.

India's higher education system is among the largest in the world, comprising **over 1,100 universities** and **more than 43,000 colleges**, and serving close to **40 million students**, as per the All India Survey on Higher Education (AISHE). The country produces a substantial talent pool annually, including over 1.5 million engineers and graduates across disciplines, supported by an expanding base of qualified faculty and researchers.



Over the past decade, India has made concerted efforts to improve quality and global competitiveness through initiatives such as the Institutions of Eminence (IoE) scheme, increased research funding, and participation in global rankings. Institutions like the Indian Institutes of Technology (IITs) and the Indian Institute of Science (IISc) have consistently improved their global standing, contributing to India's academic credibility.

At the policy level, the National Education Policy (NEP) 2020 has laid a strong foundation for internationalisation. It explicitly emphasises the need to position India as a "**global study destination,"** encouraging the entry of top foreign universities, promoting credit transfer frameworks, and enabling greater institutional autonomy. The "Study in India" programme further complements this vision by actively promoting Indian higher education institutions to international students, supported by streamlined admission processes and targeted outreach. The Union Budget 2026 has reinforced this trajectory, underscoring the **importance of cross-border collaborations, digital learning expansion, and global academic partnerships**.

Within this enabling environment, the collaboration between Primus Partners and ApplyBoard assumes particular significance. ApplyBoard, as one of the world's leading student mobility platforms, operates across multiple geographies and connects students with educational institutions through technology-driven solutions. Its extensive global network, data capabilities, and on-ground presence in key source markets provide a powerful channel for outreach and engagement. Primus Partners, on the other hand, **brings a nuanced understanding of India's education landscape, including regulatory frameworks, institutional needs, and policy priorities**. This combination allows for a more integrated approach—one that not only facilitates student recruitment but also strengthens institutional readiness and ecosystem alignment.

A **key area of focus for this partnership** is likely to be enhancing access and reducing friction in the international student journey. For many prospective students, navigating application processes, understanding visa requirements, and assessing institutional quality can be complex and opaque. By **leveraging ApplyBoard's platform**, Indian institutions can offer a more seamless and transparent experience to international applicants. At the same time, Primus Partners can work with institutions and government stakeholders to ensure that systems, processes, and support services are aligned with global expectations. This dual approach—demand-side facilitation and supply-side strengthening—is critical for building a sustainable internationalisation strategy.

Another important dimension is the diversification of student flows. Historically, India has been a major source country for outbound students, with hundreds of thousands of Indian students pursuing higher education abroad each year. While this trend continues, there is a growing opportunity to rebalance flows by attracting international students to India. This requires not only strong marketing and outreach but also the development of programmes that are globally relevant, industry-aligned, and delivered in flexible formats. The **Primus–ApplyBoard collaboration can play a catalytic role in identifying priority markets, tailoring value propositions, and building institutional capacity** to engage with diverse student segments.

India's value proposition extends beyond academics. The country offers a unique blend of affordability, quality, and cultural immersion. Compared to traditional study destinations, the cost of education and living in India is significantly lower, making it accessible to a wider range of students. At the same time, India's cultural diversity—spanning languages, traditions, cuisine, arts, and landscapes—provides an enriching and transformative experience. For students seeking not just a degree but a holistic learning journey, India presents a compelling alternative. However, translating this potential into sustained inflows requires coordinated efforts across multiple stakeholders, including government bodies, institutions, and private sector partners such as Primus and ApplyBoard.

The partnership also opens up opportunities for innovation in programme delivery and student engagement. With the increasing adoption of digital technologies in education, there is scope to explore hybrid models, transnational education programmes, and collaborative research initiatives. ApplyBoard's data-driven insights can help identify emerging trends in student preferences, while Primus Partners can support the design of policies and frameworks that enable innovation while maintaining quality standards. This is particularly relevant in areas such as skills-based education, micro-credentials, and industry-integrated learning, which are gaining prominence globally.

While policy intent and strategic alignment are necessary, they must be complemented by operational clarity, institutional commitment, and continuous monitoring. Issues such as student support services, accommodation, campus internationalisation, and post-study opportunities will need to be addressed in a systematic manner. The Primus–ApplyBoard MoU provides a platform to tackle these challenges through structured engagement, knowledge exchange, and capacity-building initiatives.

In conclusion, the MoU between Primus Partners and ApplyBoard reflects a broader shift in how India is approaching the internationalisation of its higher education system. It moves beyond rhetoric to action, bringing together key actors with the capabilities to drive meaningful change. By aligning global reach with local expertise, the partnership has the potential to enhance India's visibility, credibility, and attractiveness as a study destination.

As India advances toward the vision of Viksit Bharat@2047 such collaborations will be instrumental in shaping a more connected, competitive, and globally integrated education ecosystem, i.e. one that not only serves domestic aspirations but also contributes to the global knowledge economy.

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for providing solutions to help clients achieve their goals

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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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