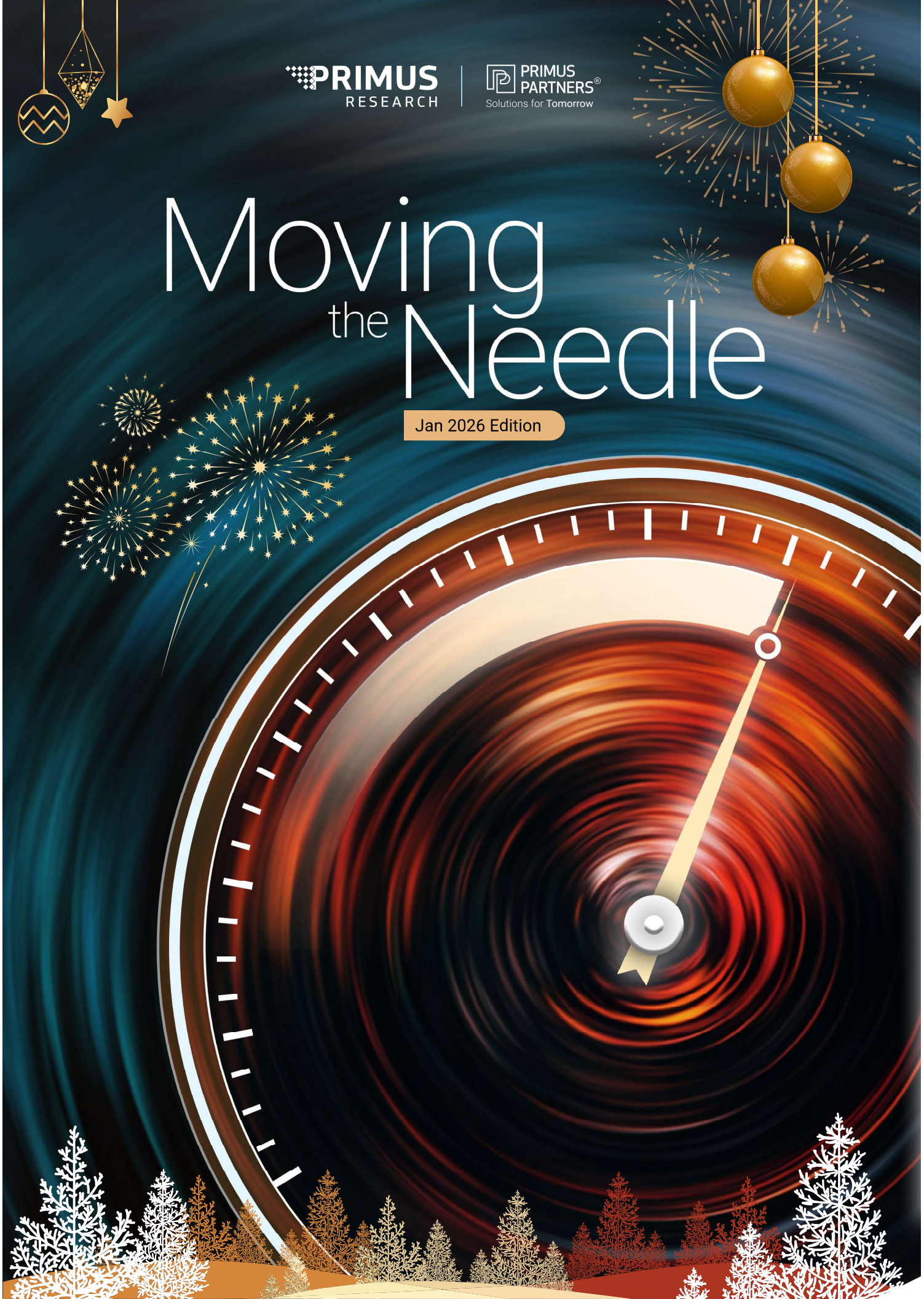
PRIMUS RESEARCH | PRIMUS PARTNERS® Solutions for Tomorrow

Moving the Needle

Jan 2026 Edition



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Devroop Dhar

Co-founder & CEO

From the CEO's desk

Season's greetings and a very Happy New Year to all of you. As I sit to write this, I am inevitably pulled into a reminiscence of the year that passed. A year of progress, achievements, teamwork, fun, and laughter. As we close another defining year at Primus Partners, I want to take a moment to reflect on what we have collectively achieved and where we are headed.

"The Titanic did not hit the iceberg because they did not see it coming, but because they could not change direction." - Dean Devlin

Yes, this is what drives us: not to be static, not to stop where we are, but to be agile, to accept change and move with the times.

The past year has been one of profound growth and deepened impact. We have continued to strengthen our position as a trusted, India-headquartered global management consulting firm, partnering with governments, multilateral institutions, private enterprises, and development organizations to address some of the most complex policy, strategy, and implementation challenges. We are a strong team of over 400 now, with an international footprint and new offices in the USA, UAE, and Saudi Arabia. For the 5th time, we have been recognized as a "Great Place to Work."

Our impact across sectors such as healthcare, education, skilling, infrastructure, sustainability, digital transformation, and public finance has been widely recognized by our clients and partners, reinforcing our belief that thoughtful strategy, when grounded in real-world execution, can truly move the needle. Our teams were integral to major policy-level interventions, ranging from supporting a tech giant in grounding the most significant investment in the tech space to supporting the WHO in drafting country-specific policy documents for the 2nd Global Summit on Traditional Medicine, in coordination with the Ministry of Ayush, Government of India.

Our MD and co-founder, Ms. Charu Malhotra, was recognised amongst ET's most impactful Women Leaders 2025, and we were also recognised as the Winner in the Excellence in Digital Transformation, Medium Enterprises category at HSBC - CNBC-TV18 SME Champion Awards – Season 2.

Looking ahead, the coming year presents both opportunities and responsibilities. As economies evolve, governance challenges grow more complex, and expectations from institutions increase, our role as advisors must go beyond analysis and recommendations. We will continue to focus on implementation-led consulting, evidence-based policymaking, and solutions that are inclusive, scalable, and sustainable.

I am deeply grateful to our clients for their trust, to our partners for their collaboration, and to every member of the Primus family for their commitment and passion. Together, we are not just responding to change; we are the ones driving it.

Thank you for being part of this journey. I look forward to another year of learning, growth, and meaningful impact.

"The world is changing very fast. Big will not beat small anymore. It will be the fast beating the slow." -Rupert Murdoch

Mr. Devroop Dhar

Co-founder & CEO

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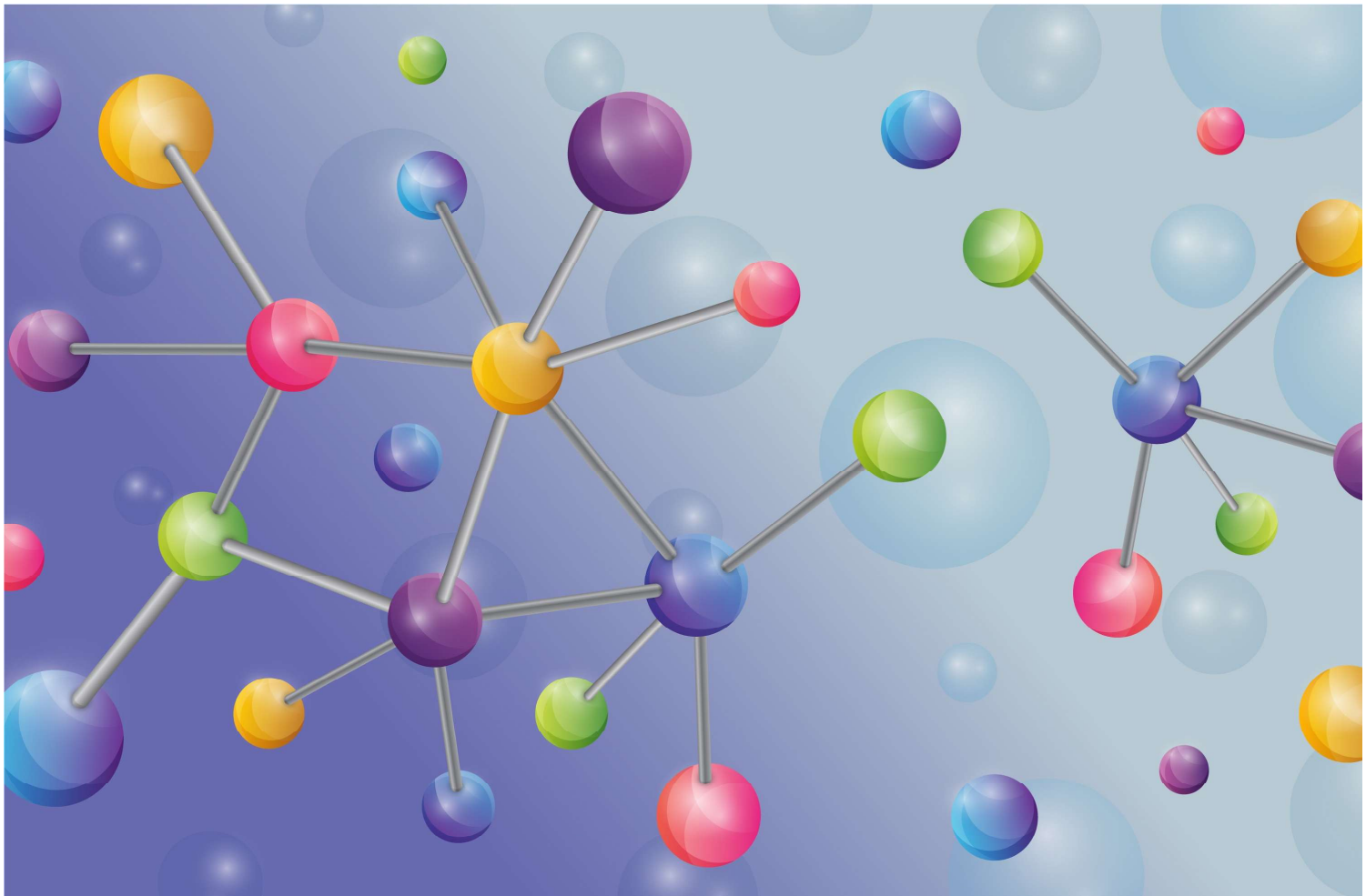
01

Atoms to AI:

Powering India's Digital Future



"In the next six to seven years, companies may run their own Small Nuclear Reactors to keep up with growing AI-led energy demand for the Data Centres," NVIDIA CEO Jensen Huang said, pointing to energy, not chips, as the real enabler for the future of AI-driven Data Centres.

Rising Power Demand from Data Centres

India's data centre capacity is currently estimated at around 1.4–1.7 GW and is projected to rise to roughly 4.5–8 GW by 2030, driven by cloud, 5G, fintech, and AI workloads. Global technology companies are already investing significantly in India's AI and data-centre ecosystem. Google has recently announced a USD 15 billion (~INR 13,500 Cr) AI Hub in Visakhapatnam, its largest investment in India, while Amazon Web Services (AWS) is setting up a USD 8.3 billion (~INR 7,500 Cr) data centre in Maharashtra.

This could push annual electricity demand from about 13 TWh range currently to 50-70 TWh by 2030, making data centres one of the fastest-growing large loads on the grid, constituting ~3.5% of the overall estimated power demand. High uptime requirements (often 99.99%) and the shift to energy-intensive AI training and inference make round-the-clock (RTC), firm & stable power just as critical as capacity addition.

Limits of the current power mix

India's power mix still relies heavily on coal i.e ~75% , with renewables (solar, wind, hydro) growing rapidly but facing intermittency challenges that complicate round-the-clock supply to mission-critical infrastructure like data centres. As states enforce renewable purchase obligations (RPOs) and many hyperscale companies commit to net-zero emissions or to RTC carbon-free electricity, reliance on coal-based power sources risks undermining sustainability commitments and long-term investor confidence. Large-scale battery energy storage systems and green hydrogen are emerging, but cost, technology maturity and deployment timelines remain constraints in the near to medium term.

Nuclear energy's value proposition

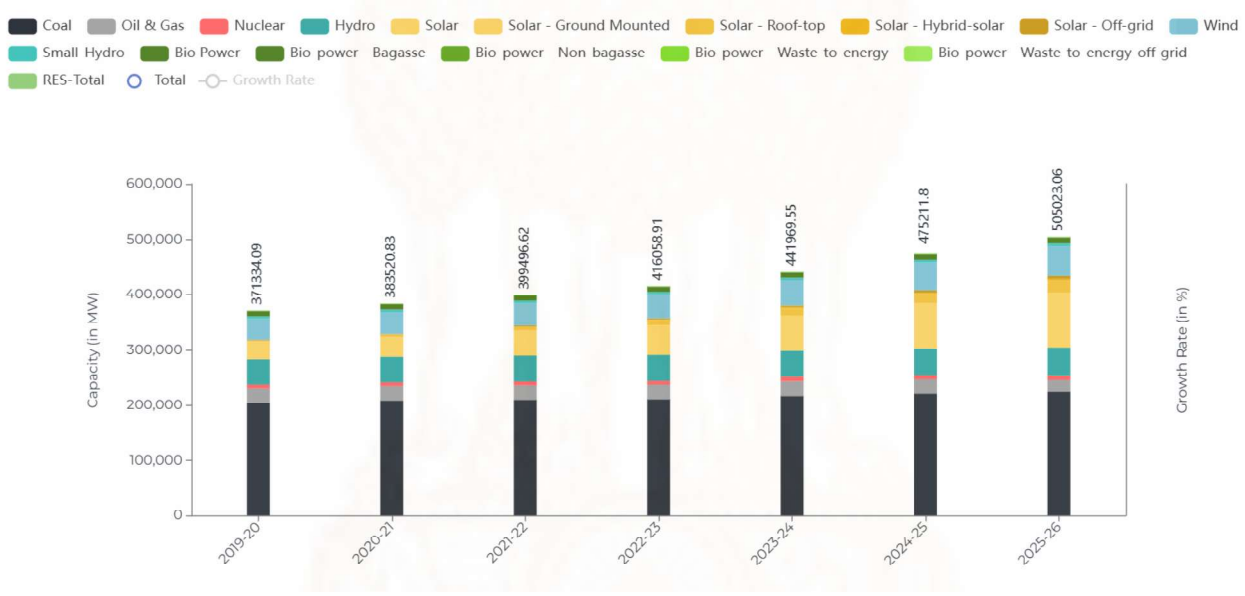
Nuclear power provides continuous baseload electricity with very low lifecycle emissions, making it a strong complement to solar and wind for decarbonising large, constant loads. A high-Capacity Utilization factor (CUF) exceeding 90%, as compared to 15-25% for Solar & 25-30% for Wind Energy, means consistently available, round-the-clock power with minimal intermittency and far higher reliability for base-load applications. Hence, Nuclear generates three to four times more annual energy per GW of installed capacity, making it a perfect choice for firm RTC loads like Data Centres. Therefore, as a complement to renewable energy, nuclear can address supply volatility, support grid stability, and enable data centres to credibly claim deep decarbonisation without sacrificing reliability.

India's Nuclear Pathway

India is positioning nuclear power as a core pillar of its long-term infrastructure and clean energy strategy, with an ambitious target of 100 GW of nuclear capacity by 2047. Today, the country operates a relatively modest but steadily expanding nuclear fleet of ~8 GW across 24 reactors. With multiple new reactors under construction or at the sanctioned stage, along with dedicated budgetary support, streamlined site approvals, and a renewed push for indigenous reactor designs, nuclear energy is increasingly being treated as a strategic asset in India's future energy mix.

Furthermore the announcement of the SHANTI (Sustainable Harnessing and Advancement of Nuclear Energy for Transforming India) Bill, approved by the Union Cabinet on 15th December 2025 and tabled in Parliament, represents a landmark reform by amending the Atomic Energy Act of 1962 to dismantle the Department of Atomic Energy's (DAE) long-standing monopoly, permitting private companies up to 49% equity stakes in nuclear power projects, fuel fabrication, and Small Modular Reactor (SMR) development.

This would, in turn, open the door for PPPs, FDI, and faster execution of projects, benefiting data center growth directly through policies allowing dedicated nuclear plants or dedicated transmission lines to supply 24x7 carbon-free baseload power, which will be crucial for AI workloads in the face of surging demand projected. The Government has allocated ₹20,000 crore to the Nuclear Energy Mission through Budget 2025-26 for indigenous SMR research and development with an aim at five operational units by 2033 to support industrial decarbonization and position nuclear as the backbone for India's digital infrastructure hubs, such as Mumbai and Chennai.



Way Forward - Small Modular Reactors (SMRs) for digital hubs

SMRs typically in the 30–300 MWe range are emerging as a promising option to serve data centre clusters because they can be factory-built, sited closer to load, and potentially deployed in phases. For India's large urban and coastal data centre hubs (Mumbai, Chennai, Hyderabad, NCR, etc.), SMRs could either provide on-site power or dedicated off-site supply via secure transmission corridors. Their smaller footprint and scalability make them suitable for industrial parks and digital infrastructure zones, where land is constrained and reliability demands are high.

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02

India’s Aviation Meltdown was a Wake-Up Call:

Indian Passengers Have Rights, But No Power

The Passenger Charter and Awareness Gap

In early December 2025, the Indian aviation sector experienced one of its worst disruptions, resulting in roughly **4,500 cancellations**, stranded passengers, and nationwide outrage. This reportedly resulted in over ₹500 crores being paid out as compensation, one of the rare instances where the financial cost of an operational failure became so evident. Amid all this crisis, one document resurfaced from its obscurity, the **Passenger Charter**.

The document published by the Ministry of Civil Aviation in **2019**, The Passenger Charter, clearly lists the airlines' obligations in scenarios of flight delays, cancellations, overbookings, and baggage handling issues. Although the Indian charter's scope is comparable to the international benchmarks, its resolutions are limited to refunds and alternate arrangements, which fall short in comparison to those of others, which guarantee automatic cash compensation.

As the Indian domestic aviation market becomes the third-largest globally, with approximately 165.4 million passengers, even minor service lapses affect millions of passengers. The grievance data on the "AirSewa" portal underscores this strain, with over 1.09 lakh complaints filed between 2016 and 2025, of which 19,200 were filed **in 2024 alone**. Even though the resolution rates have been high, this offers little comfort, as the large number of complaints indicates how frequently passengers feel compelled to escalate issues after service breakdowns.

Implementation and Accountability Challenges

As per the Passenger Charter, the delays are regarded as regulated service failures, not as mere inconveniences to be endured. If the delays exceed the prescribed limits, airlines are obliged to compensate with meals, accommodation, refunds, or alternate flights, depending on the duration and timing of the disruption.

Similar regulations also apply to flight cancellations, which are often treated as routine operational lapses and are largely mitigated with vouchers or rebooking. The Charter legally entitles passengers for refunds, and suitable alternate arrangements. In cases of denied boardings due to overbooking, it also mandates financial compensation, not merely discretionary goodwill options.
In practice, however, these entitlements are often provided only when passengers actively pursue with the airlines. The enforcement thus depends more on passengers' awareness than the airline's obligation, resulting in selective compliance rather than adequate consumer protection.

The Rights of the Passenger must be communicated effectively and awareness must be treated as a core element of enforcement. Until then, the Passenger Charter will remain visible only in moments of crisis, instead of serving as the everyday protection it was intended to be.

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03

India Does Not Have a Cold-Chain Problem:

It Has an Export-Grade Logistics Problem

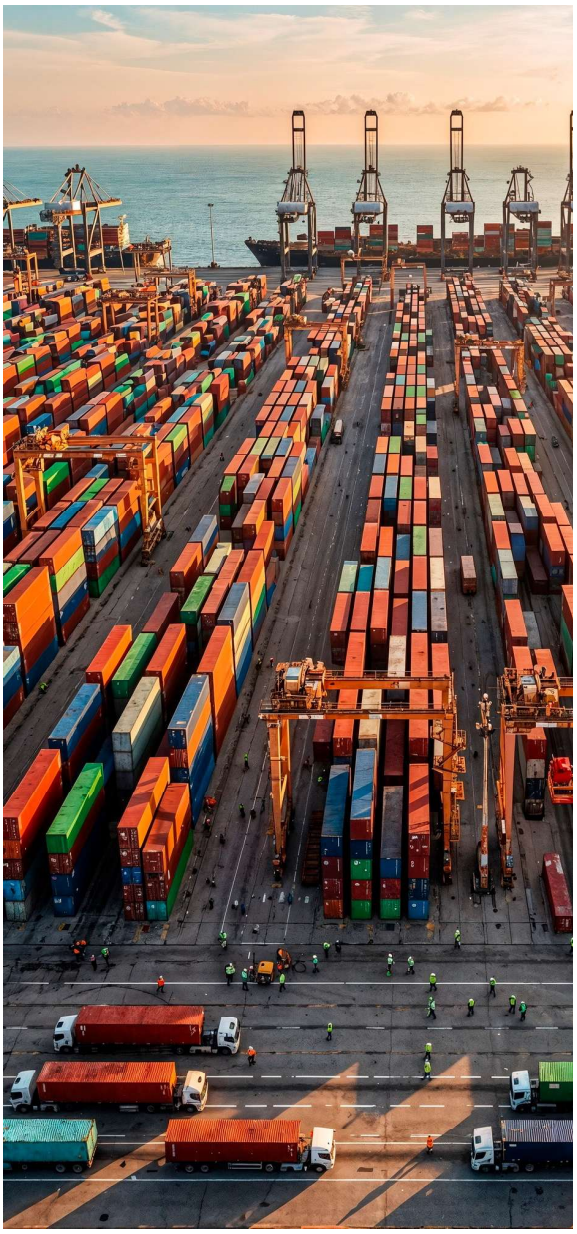
India is among the world's largest producers of fruits and vegetables, with production of 362 million tonnes in FY 2024-25, yet its share in global fresh produce trade remains modest at 3%. This divergence reflects a structural gap between farm-level output and the country's ability to preserve quality, shelf life, and consistency through export supply chains. At the centre of this challenge lies the maturity of India's cold-chain ecosystem.

Cold-chain infrastructure and reefer logistics should therefore be understood as strategic trade enablers, not ancillary post-harvest facilities.

An expanding cold-chain base with limited export orientation

India has achieved scale in cold storage but is not yet export-ready. According to the National Centre for Cold-chain Development (NCCD), India today has approximately 8,600–8,700 cold storage facilities with an installed capacity of around 39–40 million metric tonnes. This capacity has expanded steadily through public schemes such as the Pradhan Mantri Kisan Sampada Yojana (PMKSY) and growing private investment.

However, the functional composition of this infrastructure limits its relevance for horticultural exports. A large share of cold storage capacity is designed for long-term, bulk storage of a narrow range of commodities, particularly potatoes. In contrast, export-oriented horticulture requires short-cycle infrastructure: rapid pre-cooling, grading, packaging, and fast evacuation under controlled temperatures. Where these elements are missing or poorly sequenced, cold storage alone delivers limited export value.



Refrigerated transport: the weakest link in the cold chain

The effectiveness of cold storage is ultimately determined by how produce moves. Road transport accounts for over 95% of fruits and vegetables moved in India, making refrigerated road transport the critical connect of the cold chain. Yet, multiple assessments supported by NCCD and industry bodies estimate a requirement of over 60,000 refrigerated vehicles to support efficient perishables movement, while actual availability remains significantly lower.

The result is frequent temperature discontinuities between farmgate, packhouse and port, particularly for inland clusters located far from export gateways. Even where packhouses and cold rooms exist, the absence of assured reefer connectivity often leads to underutilisation of infrastructure and avoidable quality loss.

Export impact: quality risk outweighs market opportunity

India's horticultural exports are constrained by risk perception rather than demand; the volume of exports of fresh fruits and vegetables we do is not the true reflection of our production scale or crop diversity as a nation. International demand exists, particularly in the Middle East, South-East Asia, and premium segments of Europe and East Asia. However, these markets place a premium on **temperature integrity, shelf-life predictability and traceability**.

Inconsistent cold-chain performance shortens shelf life, increases rejection rates and leads to price discounting at destination markets. Exporters respond rationally by limiting exposure to distant or premium markets, while farmers receive weak signals to invest in export-oriented varieties and practices. Over time, this reinforces a low-value equilibrium in horticultural trade.

The North-East: a reminder of why systems matter

The North-Eastern Region illustrates the cost of fragmented cold logistics. The NER possesses strong horticultural fundamentals and proximity to South-East Asian markets but faces acute first-mile and evacuation constraints. APEDA-supported infrastructure gap assessments highlight limited pre-cooling, weak aggregation, and near-absence of reliable refrigerated transport from production clusters to gateways such as Guwahati and Siliguri.

Post-harvest losses in several North-East horticultural clusters are estimated at 25–30%, largely due to logistics rather than production constraints. While the region is unique in its geography, the underlying lesson is national: cold-chain assets without assured movement pathways do not translate into export outcomes.

The way forward: from asset creation to cold-chain systems

India's next phase of cold-chain development must be system-led rather than asset-led. Some of the key areas to focus on are as follows:

First, plan cold chains as cluster-to-gateway systems. Future investments should prioritise integrated corridors linking production clusters to ports, airports and land gateways. Pre-cooling, packhouses, cold storage and reefer transport must be planned and sanctioned as a single operating system, with clear evacuation logic and utilisation targets.

Second, aggregate demand to unlock reefer viability. Fragmented volumes remain a key barrier to refrigerated transport economics. Aggregation through FPOs, exporters, cooperatives and digital platforms can improve route density and fleet utilisation. Asset-light leasing models, supported by targeted viability mechanisms, are particularly important for low-volume or remote regions.

Third, develop perishable-focused export gateways. Select ports, airports, and inland nodes should be designated and equipped as perishable gateways with dedicated "green channels" with priority handling, temperature-controlled yards and inspection areas, plug-in points, and streamlined clearances. Such nodes will significantly reduce dwell time, a critical determinant of export quality.

Fourth, scale multimodal refrigerated logistics. Refrigerated rail rakes and hub-and-spoke models linked to railheads offer scalable solutions for long inland distances. Early pilots demonstrate potential to reduce transit risk and cost, and merit structured scale-up for export corridors.

Finally, institutionalise temperature assurance and traceability. Progressively linking export incentives, certifications, and insurance mechanisms to temperature monitoring and digital traceability will align domestic practices with global buyer expectations and encourage disciplined cold-chain operations.

India's cold-chain challenge is no longer about infrastructure creation alone; it is about **integration, predictability, and performance.** Cold storage, refrigerated transport, and gateway handling must function as a single export-grade system if India is to realise the full value of its horticultural production.

Recognising cold-chain and refrigerated logistics as **core trade infrastructure**, and planning them accordingly, will be central to reducing losses, improving farmer incomes, and strengthening India's position in global horticultural markets over the coming decade.

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04

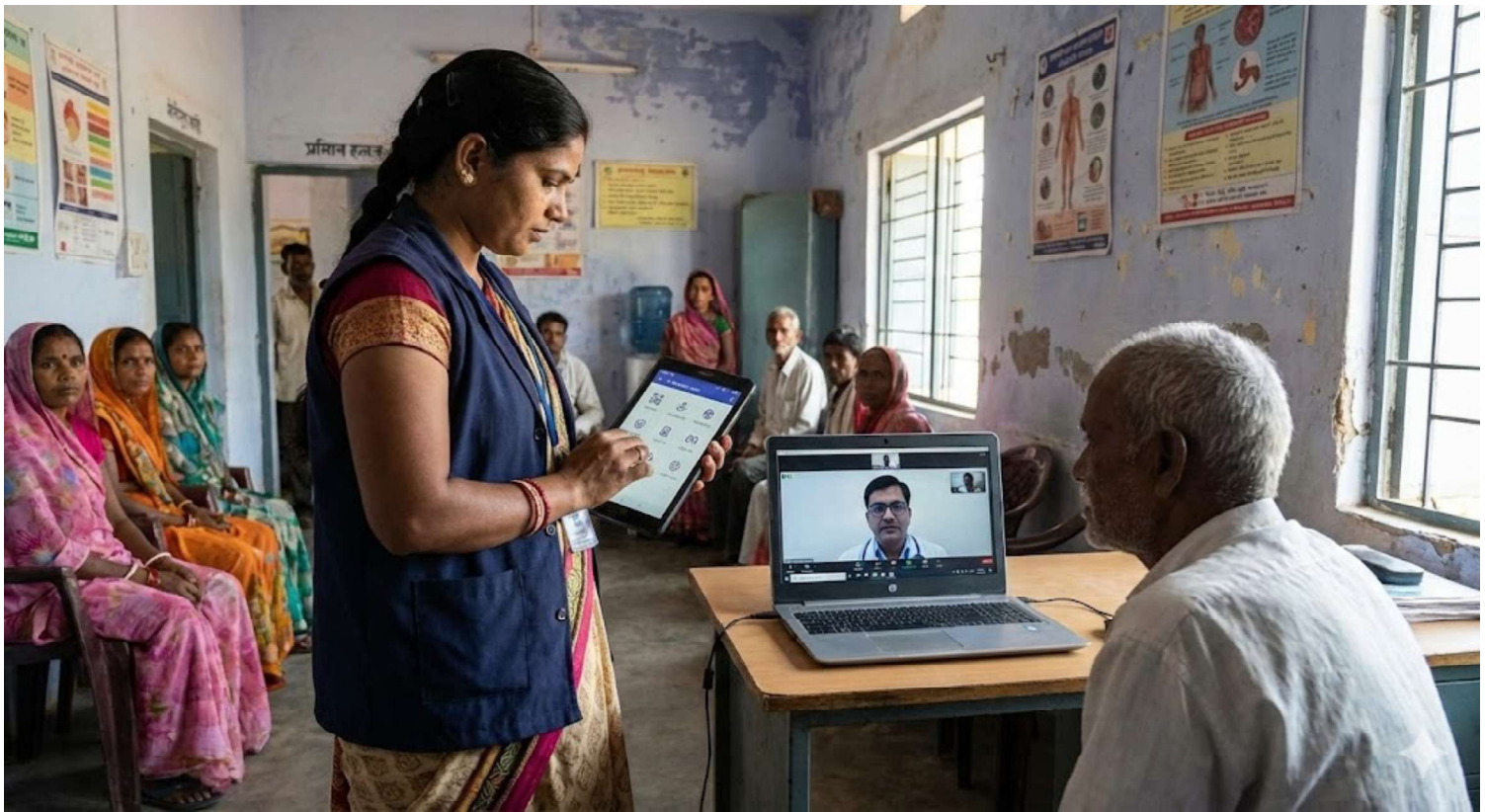
How AI Is Quietly Transforming Indian Hospitals

A few years ago, a young radiologist in Delhi often viewed a chest X-ray and felt unsure about a faint shadow in the corner. Today, an AI-powered tool can instantly highlight that same shadow and warn that it might be early tuberculosis.

Bridging the Gap: AI Goes Rural

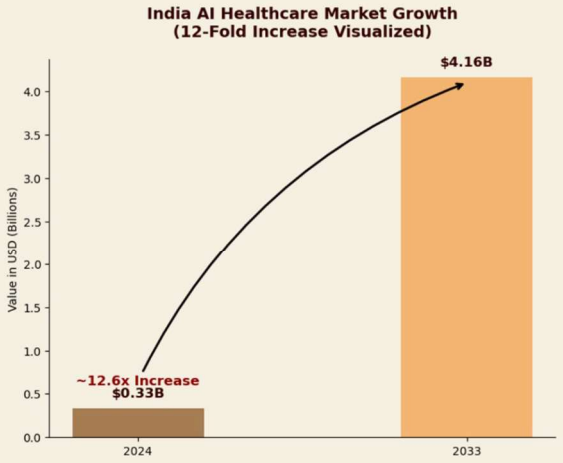
Imagine a setting. "*A primary health centre in a remote village of India where a patient is attended by a Health worker with an AI-powered app guiding the health worker through a patient's symptoms, identifying the possible condition. These tools, finally getting integrated into telemedicine platforms, are connecting the patient to a remote specialist for diagnosis and treatment.*" It is no longer imagination; AI has made it possible. This combination of AI + tele-health is narrowing the urban-rural care gap, bringing specialist care to the last mile.

These scenes represent a quiet revolution spreading across the Indian healthcare landscape. Artificial Intelligence (AI) is no longer just a futuristic concept. It is already present in labs, dispensaries, hospitals, and even at primary health centres in remote villages



Market Landscape & Startup Innovation

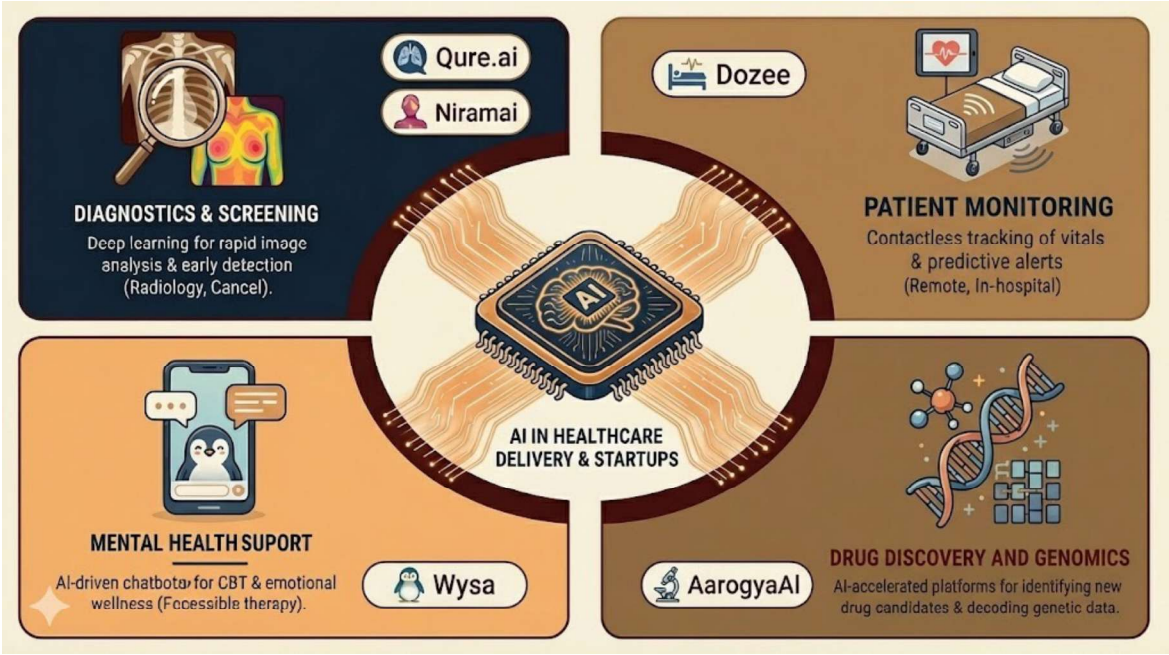
According to IMARC Group (2024) research, India's AI-in-healthcare market was valued at USD 333 million in 2024 and is expected to grow more than 12-fold to USD 4.16 billion by 2033, expanding at a 30.8% annual rate. Meanwhile, India's broader digital health market (including AI, telemedicine, and health apps) is estimated to grow from USD 14.5 billion in 2024 to nearly USD 107 billion by 2033 (Grand View Research, 2024).



In 2024, Indian health-tech startups raised about $1.13 billion, reflecting renewed investor confidence in AI healthcare. AI is transforming the overall outlook of healthcare, with new startups reshaping Diagnostic & Imaging (Qure.ai and Niramai), Patient Monitoring, Management, and Health Insurance (Dozee, Tricog, Artelus, and Wysa), and Drug Discovery & Genomics (ArogyaAI and Molecule AI).

These figures aren't just market forecasts. It reflects India's growing confidence in data-driven healthcare.

Life is getting easier for both patients and health professionals. It is a transformation in making.



Government Support: A "Full-Stack" Approach

The Government of India is actively nurturing the AI healthcare sector through a comprehensive "full stack" support system. The Government has allocated a budget of Rs 990 crore to establish and nurture three CoEs, primarily for healthcare at the Centre of Excellence - Translational AI for Networked Universal Healthcare (TANUH) at IISc Bangalore. In December 2025, Google.org announced an additional grant of USD 8 million (~Rs 67 crore) to support these AI Centres of Excellence, further strengthening the research and organisation capabilities of TANUH and its counterparts. It is dedicated to driving AI innovation for the early detection, prevention, and management of non-communicable diseases. AI advancements in healthcare are a significant priority of the IndiaAI mission. Funding for startups through BIRAC's BIG Scheme and MeitY's TIDE 2.0 and GENESIS programs is incubating the startup ecosystem.

Global Partnerships: Fueling the Revolution

Global agencies are also supporting the "quiet revolution" in AI healthcare in India, providing funding to promote local innovation. The Global Fund and Unitaid teamed with Qure.ai, investing over US$193 million from 2021 to 2025 in AI TB screening. They also back the India Health Fund (IHF), working with Qure.ai to digitize X-rays and to improve AI tools such as "qXR TB". The Bill & Melinda Gates Foundation promotes "AI equity" by partnering with IndiaAI to bridge the urban-rural digital divide. The UK's CDC Group (now British International Investment) and pi Ventures invested in Niramai Health Analytics, supporting early-stage, affordable breast cancer screening. These efforts are helping high-tech ideas turn into accessible, life-saving solutions for underserved Indian communities.

The Future

AI can definitely not replace doctors, but it will become an indispensable partner in their day-to-day practice very soon. Numerous AI applications are being developed to address a wide range of health issues, from medical imaging and diabetes management to eye care, disease prediction, and precision medicine.

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05

The Digital Pivot:

Moving Beyond the Spreadsheet towards a Low-Carbon Future

The latest UN Emissions Gap Report makes it clear: even if all national pledges (NDCs) were fully met, we would still be facing a 2.5°C temperature rise, far above the 1.5°C target set in the Paris Agreement. Recent COP summits have emphasized that ambitious targets alone are insufficient. Achieving progress requires global emission cut-off about 40% by 2035. For Companies, this entails switching to active, real-time energy and emissions management from passive, end-of-quarter reporting.

The main challenge is not a lack of commitment, but a retrospective approach. Treating decarbonization as a compliance task limits organizations' ability to make necessary operational adjustments. In India, this challenge is pronounced. Although the country has achieved its renewable energy targets by reaching 50% non-fossil fuel power capacity before 2030, which was initially set for 2030, the top 1,000 listed companies contribute nearly 43% of total emissions. Disclosure frameworks such as SEBI's BRSR are making progress, but their manual estimation methods fail to deliver sufficient precision, which an expanding economy currently demands. Companies need to shift from basic disclosures to verifiable real-time mitigation measures to reach India's 2070 Net Zero goal.

Technology is now at the core of all international climate-related dialogues. Conferences like COP30 increasingly emphasize the importance and relevance of advanced tools such as Digital Twins for both Earth System Modeling and industrial resilience. This emphasis at the international level clearly demonstrates that technological innovation is essential for significant carbon reductions. The use of digital tools for implementation is highly essential to meet national climate commitments.

A "digital twin" is more than a simulation. It is a virtual replica of a physical asset, process, or system, such as a building, factory floor, or supply chain. It runs "what-if" scenarios, forecasts outcomes, and replicates the operational state of its real-world equivalent using continuous IoT sensor data.

Data by itself, however, does not lower emissions. The application of Artificial Intelligence (AI) to these digital duplicates is where real progress occurs. AI and Machine Learning analyze large datasets to identify inefficiencies that traditional analysis often overlooks, such as resource waste or energy leaks. By anticipating equipment failures before they cause energy surges or production delays, AI enables predictive maintenance. Most significantly, it enables businesses to run virtual scenarios to identify the most effective and least disruptive route to net-zero targets.

The ability to provide comprehensive, practical control over carbon emissions, starting at the asset level, is the most revolutionary advantage. Digital twins facilitate enhanced smart manufacturing by monitoring a business's owned and controlled operations (Scope 1 and 2). In these settings, a digital twin can match real-time renewable grid availability and pricing estimates with the energy effect of various production plans. Both carbon intensity and operating expenses can be reduced by shifting energy-intensive operations to periods when solar or wind generation is at its peak.

Predictive maintenance is another area where this optimization is applied. By detecting anomalies that indicate equipment deterioration, the Twin helps prevent unanticipated resource waste and energy spikes.

NTPC: Improving Heat Rate and Emission Control

For its thermal power facilities, NTPC, the biggest power company in India, uses AI-powered Digital Twins to track "heat rate" (efficiency) in real time.
By detecting minute thermodynamic losses that human operators might overlook, the technology enables quick modifications to boiler combustion. This guarantees that the plant runs as efficiently as possible, which immediately lowers the amount of coal consumed every kilowatt-hour produced.

Adani Transmission: Predictive Maintenance for Grid Efficiency:

Adani Transmission manages India's extensive power corridors using digital twins of its transmission cables and substations. They avoid "unplanned energy spikes" and transmission losses by employing AI to forecast equipment deterioration. By forecasting grid stability under changing weather conditions, the twins also enable them to more effectively integrate intermittent renewable energy from solar and wind farms.

These solutions go beyond simple thermostats for real-time building management. To control HVAC and lighting, they incorporate occupancy data, comfort settings, and weather forecasts. By switching from reactive to proactive management, every kilowatt is used effectively.

Scope 3, also referred to as the "black box" of the value chain, presents the biggest opportunity since it can be responsible for up to 80% of a company's carbon footprint. By building virtual maps of the complete supply chain, including all supplier levels, logistics, and raw material sources, digital twins solve this problem. Businesses may quickly evaluate the carbon impact of switching suppliers or switching from road to rail freight by using a digital twin. Additionally, advanced Product Lifecycle Analysis (PLA) makes it possible to monitor a product's emissions from "cradle to grave".

Adopting AI-driven digital twins has strategic implications for corporate governance and climate action that go beyond operational efficiency. They offer auditable, time-stamped data to avoid greenwashing and assist businesses in adhering to laws like the EU's CSRD and India's BRSR. Sustainability can now be inextricably linked to efficiency, resilience, and profitability thanks to digital twin-enabled real-time optimization that lowers energy costs, material losses, downtime, and operational risk. With this approach, businesses may view decarbonization as a source of financial resilience rather than a cost center.

A similar digital transformation is urgently needed for India's rivers, which are among the most climate-stressed systems in the world. A digital twin of a river basin, integrating real-time hydrology, rainfall, groundwater extraction, pollution loads, dam operations, and land-use data can move river management from reactive clean-up to predictive governance. Such twins allow authorities to simulate flood and drought scenarios, anticipate pollution spikes, optimize reservoir releases, and assess the cumulative impact of upstream activities on downstream ecosystems and cities. For India, where rivers cut across state boundaries and departments, a basin-level digital twin creates a shared, science-based decision layer that aligns water supply, agriculture, urban planning, disaster management, and pollution control. By enabling what-if analysis before crises occur, river digital twins can reduce disaster losses, improve water security, and make river rejuvenation efforts measurable, auditable, and outcome-driven, transforming rivers from administrative liabilities into managed climate assets in India's low-carbon and climate-resilient future.

Infosys: Smart Building Management at Scale

Infosys deploys digital twins on its campuses in Hyderabad and Bengaluru to oversee one of India's biggest corporate real estate holdings.
The twins automatically control the HVAC and lighting systems by integrating occupancy sensors, comfort criteria, and weather forecasts. By ensuring that no kilowatt is spent on vacant or overcooled spaces, this "proactive asset management" has assisted the company in maintaining its carbon-neutral position.

AI and digital twin integration is a governance approach as well as an engineering choice. A unified policy framework is necessary for scaling this strategy. To standardize data sharing and modeling, businesses and governments must work together. Absence of standards may lead to the loss of investor confidence.

There is still a significant talent gap at the nexus of industrial engineering, data science, and artificial intelligence. As India pursues its national "Skilling Missions," the development of people with expertise in both industrial engineering and data science is crucial. The ability of countries to transform digital innovation into scalable climate solutions also hugely depends on strategic public-private investment in this hybrid competence.

Retrospective accounting is no longer sufficient. Artificial intelligence and digital twin technology are now crucial for coordinating climate goals with practical realities as environmental and regulatory constraints increase. In the next five to ten years, institutional investors and international regulators will anticipate industrial digital twins, which will shift from a competitive advantage to a standard prerequisite for market participation.

For leaders, the message is clear: strategic delay is no longer a viable option. Building the necessary data infrastructure and refining AI-driven models now are essential for long-term success. Businesses may position themselves for long-term leadership in the low-carbon economy by embracing this digital revolution today.

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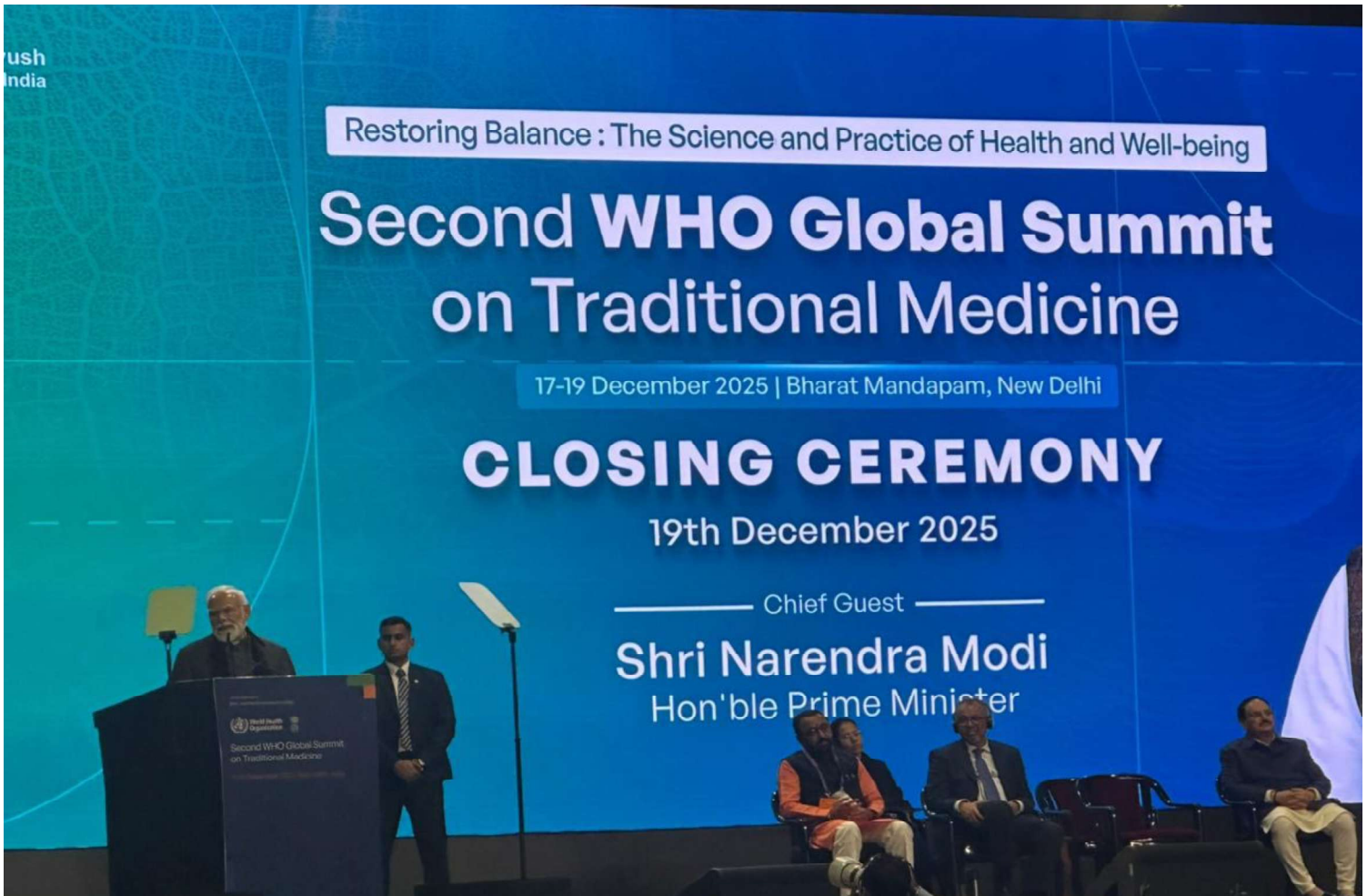
06

Primus Outreach:

2nd Global Summit on Traditional Medicine (17–19 December 2025, New Delhi)

Jointly Organized by WHO and Ministry of Ayush, Government of India



Technical Partnership, Ministerial Engagement & Global Commitments

Context and Purpose

The 2nd Global Summit on Traditional Medicine, convened in New Delhi from 17–19 December 2025, marked a defining moment in advancing Traditional Medicine (TM) as an evidence-informed, policy-enabled, and globally integrated pillar of health systems. The Summit brought together clinicians, researchers, scientists, traditional medicine practitioners, policymakers, and global leaders from over 100 countries, with high-level political participation and strong stewardship from the Government of India and the World Health Organization (WHO).

Primus Partners served as a Technical Support Partner to WHO, providing end-to-end strategic, analytical, and coordination support for the High-Level Ministerial Roundtable and the presentation of country and non-state actor commitments during the Ministerial Roundtable and Closing Plenary of the Global Summit.

The way forward: from asset creation to cold-chain systems

Primus Partners worked closely with WHO and the Government of India to support diplomatic engagement, evidence-based commitment development, and outcome articulation. Key areas of support included:

- Strategic mapping and prioritization of Ministries of Health, Ministries of Traditional Medicine, and WHO regions, in close coordination with WHO Country Offices.
- Formal outreach coordination and confirmation tracking with Member States, working jointly with WHO GTMC and Indian Government Missions.
- Coordination with the WHO team for development of key messages, background materials, and strategic resources supporting ministerial engagement.
- Development of tailored country engagement kits, providing each national delegation with thematic inputs, analytical insights, and structured guidance to support informed commitments.

Evidence-Based Commitment Development

A central pillar of the engagement was data-driven commitment formulation. In close collaboration with the WHO GTMC team, Primus Partners:

- Conducted comprehensive analysis of the WHO 3rd Global Traditional Medicine Survey dashboard, initially covering Group of Friends countries and subsequently expanding the analysis as additional country confirmations were received.
- Developed country-specific landscape assessments outlining the current status of Traditional Medicine policy, regulation, integration, research, and service delivery.
- Drafted tailored, action-oriented commitment options aligned with national priorities, WHO frameworks, and global best practices.
- Prepared Ministerial Roundtable and Closing Plenary presentations, enabling Health Ministers to articulate national commitments during high-level sessions, including the Closing Plenary attended by the Prime Minister of India and Director General of WHO.
- Shared draft commitments with Member States for validation, refinement, and country-led editing, ensuring ownership and contextual relevance.
- In parallel, a dedicated live digital submission platform was developed, enabling countries to formally submit and record their commitments through the Summit website.

Member State Participation and Commitments

- Commitments were formally submitted through the Summit platform by countries including Bangladesh, Cuba, Iran, Malawi, Nepal, and Senegal, alongside in-session ministerial announcements.
- A total of 26+ countries were actively engaged at ministerial level across the Roundtable and Closing Plenary sessions, reflecting strong political momentum for Traditional Medicine globally. The Ministers of countries participated in the Summit included Afghanistan, Bangladesh, Barbados, Cabo Verde, Cameroon, Cuba, Fiji, Iran, Kenya, Liberia, Malawi, Maldives, Mauritius, Micronesia, Nepal, Philippines, São Tomé and Príncipe, Seychelles, Senegal, South Africa, South Sudan, Sri Lanka, Tajikistan, Tanzania, Thailand, and Trinidad and Tobago.

Summit Closure and Global Message

During the Closing Plenary, the WHO Director-General emphasized:

"As we conclude this summit, let us live united by the shared conviction that the future of health must be integrated, inclusive, and informed. By restoring balance between people, communities, and planet, we can build healthier societies for generations to come."

The Prime Minister of India underscored that the scale and diversity of global commitments reflect a shared international resolve to strengthen Traditional Medicine through sustainability, science, regulation, and policy coherence. The Summit witnessed strong support from the Government of India and reaffirmed the central role of evidence, quality assurance, and global cooperation in advancing Traditional Medicine worldwide.

Outcome and Significance

The 2nd Global Summit on Traditional Medicine successfully translated global dialogue into measurable political and institutional commitments from Member States and Non-State Actors alike. Through structured engagement, rigorous data analysis, and coordinated diplomacy, the Summit established a clear pathway for:

Stronger national policies and regulatory frameworks

Evidence-based integration of Traditional Medicine into health systems

Enhanced global collaboration and knowledge exchange

Long-term positioning of Traditional Medicine as a contributor to sustainable, people-centred health systems

Primus Partners is honoured to have supported WHO and global stakeholders in shaping this landmark outcome.

Engagement of Non-State Actors (NSAs)

For the first time, the Summit systematically invited and integrated Non-State Actor (NSA) commitments, recognising their critical role in advancing Traditional Medicine ecosystems. Primus Partners, in collaboration with TCIH, supported:

- Development of a structured NSA commitment template aligned with WHO principles.
- Analytical review and synthesis of submitted commitments.

Approximately 58 Non-State Actors from across the globe submitted formal commitments, including:

- 19 Health Practitioner Organizations (public, non-profit), 19 Research and Academic Institutions, 12 Nongovernmental Organizations, including youth groups, 8 Philanthropic Organizations and Foundations submitted their specific commitments.

- These NSAs represented diverse geographies, including Argentina, Bolivia, Brazil, Canada, Colombia, Dominican Republic, Fiji, Greece, India, Italy, Lesotho, Peru, Republic of Armenia, Sri Lanka, Switzerland, Tanzania, The Netherlands, United Kingdom, United States, and Uruguay.

- NSA commitments were formally presented during the Closing Plenary to the WHO Director-General and the Prime Minister of India.

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