

MOVING THE NEEDLE

The Journey from Policy to Implementation

September 2025



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Dear Readers



Welcome to the September 2025 edition of Moving the Needle, brought to you by Primus Partners.

As India marked its 79th Independence Day last month, the celebrations ushered more than a sense of history, the message from the ramparts of Red Fort held out a vision for the future. The choices we make today on how we power our economy, how we prepare our youth for tomorrow's jobs, and how we strengthen our health systems will determine whether we can truly achieve the vision of Viksit Bharat.

At Moving the Needle, we see this opportunity as an ocean of immense possibility.

This September, we explore themes that are deeply tied to this national journey:

- Building India's Clean Energy Economy through Hydrogen, Renewables, and Beyond – The clean energy transition is not just about climate, but also about India's economic security.
- Demystifying Ethanol Blending – As India advances its renewable fuel strategy, ethanol blending plays a critical role. Yet, the transition to E20 raises questions of vehicle readiness and efficiency.
- Churning the ITI Advantage: Turning Skills into Employment – On the back of a ₹60,000 crore investment to upgrade 1,000 ITIs, India has the potential to reposition technical skilling as a driver of growth.
- From Narsimha's Roar to AI-Hanuman: Why India Must Back Human Creativity-An insight into India's foray into the world of animation and National AVGC-XR Mission.
- Primus Outreach | Strengthening Health Leadership for a Resilient Future – ADB's Health Leadership Course, co-designed with Primus Partners, Public Health Foundation of India, and Dalberg Design, reflects Asia-Pacific's shared commitment to resilient healthcare.

We hope this edition offers perspective and sparks conversation on how India can emerge more confident, resilient, and globally leading.

Until next time,

The Editorial Team

Primus Partners – Moving the Needle



01

Building India's Clean Energy Economy through Hydrogen, Renewables, and Beyond

The debate on clean energy is often framed through the lens of climate change, but for India, the stakes go far beyond environmental stewardship. A rapid and decisive transition to clean energy is critical for safeguarding national energy security and accelerating long-term economic growth.

India currently imports over 80% of its crude oil needs, and recent events have again demonstrated that the economy is exposed to global price shocks and geopolitical risks. Diversifying the energy basket through domestic renewable and alternative sources is therefore not just desirable but essential. Clean energy solutions—solar, wind, bioenergy, and emerging fuels like methanol and hydrogen—offer the twin advantage of reducing import dependence and creating globally competitive industries at home.

However, this transition requires urgency and scale. The government and industry must act quickly to develop hydrogen value chains, including investment in electrolyzers, storage infrastructure, and distribution networks. Fuel cells can become a backbone of decarbonized mobility and industrial applications, while methanol provides a low-cost pathway for cleaner fuels in shipping and heavy transport. Parallely, India must accelerate investments in solar and wind energy, which remain the most scalable solutions for power generation.

Equally important is the infrastructure backbone. A modern, resilient electric grid and widespread charging points are prerequisites for mainstreaming electric vehicles and integrating variable renewables into the energy mix. Without these, clean energy adoption risks being fragmented and inefficient.

Quick, coordinated measures from policymakers, regulators, investors, and industry leaders can place India firmly on the path to energy independence, while also creating millions of good jobs. Clean energy is not just an option—it is India's economic and strategic necessity.



Contributed By



Davinder Sandhu
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02 | Demystifying Ethanol Blending

What is Ethanol and how is it commercially made?

Ethanol (C_2H_5OH) is a volatile, flammable liquid with a pungent taste belonging to the alcohol family. Commercially, it is mostly used for blending fuel; its other uses are as an active ingredient in alcoholic beverages, the production of medicines and chemicals etc.

Ethanol can be derived from Petroleum or through the fermentation of biomass. Ethanol produced from Biomass is called Bioethanol, and it is a renewable source. There is a debate around food vs fuel concerning ethanol, and new technologies are resolving the issue:

1 st Generation	Edible Biomass – Sugar beet, sugarcane, wheat, corn
2 nd Generation	Non-edible biomass – Wood, straw, grass, waste
3 rd Generation	Algal Biomass – Macroalgae, microalgae
4 th Generation	Breakthrough – Pyrolysis, solar to fuel, gasification
5 th Generation	Genetically modified – engineered algae and other organisms

As of now, in India, most commercially produced ethanol comes from 1st, 2nd, and 3rd generation methods.

Advantages of Ethanol blending in fuel

The 3 key benefits of Ethanol blending are:

- > It is a cleaner burning fuel,
- > It is renewably sourced.
- > Helps reduce oil imports.

Issues with Ethanol blending

E20 fuel (20% ethanol, 80% petrol) can cause serious issues in vehicles not designed for it. Ethanol absorbs moisture, leading to phase separation and corrosion in metal components like the fuel tank, pipes, injectors, engine, and exhaust. It also degrades rubber and plastic parts such as seals, gaskets, and fuel hoses, which aren't ethanol resistant. Additionally, ethanol alters the air-fuel ratio, and if the ECU or PGM-FI system isn't calibrated for E20, it can result in poor combustion, knocking, reduced performance, and hard cold starts.

Ethanol also has lower energy content, reducing fuel efficiency over time. Incompatible engines may suffer increased wear, corrosion, and premature failure. Manufacturers of E20-ready vehicles use resistant materials, protective coatings, and re-tuned fuel systems to counter these effects. Without such adaptations, regular use of E20 in non-compatible vehicles, especially two-wheelers, can lead to multiple mechanical problems within weeks.

The USA and Brazil are No. 1 and No. 2 producers of Ethanol and blend it with fuel. In the US, E10 is quite popular, and no major technical problems have been reported. In Brazil, blends up to E85 are available and are used by vehicles specifically designed for high ethanol content. High blends are available optionally at different nozzles in the fuel pump.

E20 Regulation in India

Vehicles manufactured between 2012 and 2023 were already mandated to be E10-compliant, whereas all vehicles manufactured after April 1, 2023, are required to be E20-compliant. Hence, a lot of vehicles on the road currently have some degree of ability to run on ethanol-blended fuel. Refineries and the fuel distribution systems are already geared up and are supplying E20 mix at most locations.

The Ministry of Oil and Gas has stated that concerns over vehicle damage and drastic reduction of fuel efficiency are misplaced and not backed by empirical data or scientific study.

Contributed By



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03

Churning the ITI advantage

Turning Skills into Employment

The recently approved national programme for upgrading 1000 ITIs with ADB and World Bank funding support, creates opportunity for a brand makeover of ITI. Repositioning of ITI will reshape public perception with a cascading impact on the skilling ecosystem. ITIs need to be positioned not as a fallback option, but as a first-choice pathway to modern job roles. Yet, the more youth get skilled the more employable youth will remain unemployed, unless we solve for placement pipelines.

What is our commitment to hiring from ITI? With Shri Narendra Modi announcing Pradhan Mantri Rozgar Yojna, in his Independence Day Speech (2025), there will be an urgency for quality benchmark, trust-building mechanism and discoverability of skilled youth by recruiters. Industry hires from ITI on 3rd party payrolls with 90% terminated within the first year.

NSDC's Skill India Digital Hub (SIDH) can be developed into a National Skills Grid to serve as a unified ecosystem for job-matching, certification and tracking employment outcomes of ITI skilled youth.

Low aspirational value of ITI is echoed in dated infrastructure, equipment, capacity utilisation (~14.5 Lakh enrolment in ~15000 ITI), low enrolment of girls (~14%). While re-writing the narrative of ITI it is critical to take a hard look at where gaps lie, as investment in ITI can be an important cog in the Viksit Bharat wheel. The makeover also needs media campaigns linking ITIs to national missions - Make in India, Digital India, Skill India International, showcasing alumni journeys, startup success stories, and global placements.

We need alignment with local industry needs to plan **skilling, reskilling and upskilling targets**, if we are to **Esolve for skill mismatch. Employers reported 63% "hard-to-fill" vacancies**, and **39% of current skills** may become outdated by 2030 (WEF). Therefore, we need a **long-term model of cooperation** - to meet the **Viksit Bharat, Make in India, Atmanirbhar Bharat**, objectives by building a workforce that is not merely skilled, but also under constant development with industry.

The **₹60,000 crore budget for upgrading 1000 ITI** is a chance for **'next generation reform'** and a part of it must think **'gender'**. NAVYA, a collaboration of MWCD and MSDE is exposing adolescent girls to future-ready skills, confidence, and a clear path to opportunity, such as drone 'agripreneurs'. Perhaps **women-only ITIs offering technical trades** (beyond traditional crafts) can expand participation, with **transportation stipends, hostel facilities, and safety**.

Need to skill, upskill, reskill for ~400mm and 8mn non-farm jobs per year. Despite intent, focus, effort and momentum, persistent talent gap, prevalent since 2022, continues to adversely impact recruitment. Only ~5% of India's workforce has formal **vocational training**, compared to around 60% of the South Korean work force. Although ~20% of the workforce is already employed in **green jobs**, yet less than 1% of the workforce have certification for skill for green economy. In **electronics and smart manufacturing sectors** PLI schemes need CNC /robotics technicians, but only **4.4 %** of workforce are formally skilled. The gap can be addressed by increasing the dual apprenticeships to about **5-10 m seats on a sustained basis** from the current ~0.6 m annual seats. **In emerging tech** ~67% employers struggle to hire talent in advanced digital, AI – while there

are ~50% graduates who are employable in such sectors though with limited exposure, we need to upskill **70 m** workers in data, cloud, cyber by 2030. Growing healthcare industry highlights the need for care givers, lab-technicians. Yet there are less than 2% NSQF certifications in this sector along with migration, requiring adding 1m caregivers by 2030.

To increase **manufacturing share to 255 in the GDP**, we need to create **100 million+ additional jobs and empower urban poor / rural migrants** with skill sets for inclusive growth. Moreover, we need **State Skill Councils** - as empowered bodies for industry coordination, curriculum reviews, and **agreements with local industry clusters, and MSMEs** for job-aligned / regional skilling models, sectoral relevance and scalability.

At present **main lacks** are

- practical knowledge,
- significant on-the-job training,
- apprenticeships,
- instructor vacancies (30-40%) especially in trades like robotics and mechatronics,
- Industry 4.0,
- modern and industry linked teaching methods, socio-economic exclusions,
- and weak industry linkages.

World Economic Forum ranks India 3/7 on **'Soft – Transversal' Skills** showing we need to be built in better designed soft skills critical-thinking modules not just as an incidental inclusion but to look at micro credentials for these skills in ITIs. Training must go beyond technical skills like workplace ethics, discipline, functional literacy - understanding safety instructions, machine manuals, updating muster rolls, filling job sheets, and leave applications.

Form follows function, and modern infrastructure and revamped curriculum of 1000 ITI will create Industry-ready workforce and promote self-reliance and reduced dependency on foreign expertise. Need is to **move beyond current entry levels** - NSQF level 3-4 to levels 7-10, especially in precision manufacturing, AI, cloud data, **advanced trades** like EV maintenance, automation, AVGC, Drones, Skills for a Creative/ digital economy. Perhaps even **develop some ITI into skill parks**, reinforcing their identity not just as training centers, but as incubators of local innovation and economic vitality.



Industry engagement needs improving - live Capstone Projects with Industry, Mentorship and Faculty Immersion programs with industry professionals working as adjunct faculty, such as the L&T Skill Trainers Academy in Madh Island, Maharashtra; and **Gig Economy Partnerships of ITI** Tie-ups can train youth in last-mile delivery, inventory, warehousing. **District Skill Committees & ITI Management Committees** can collaborate with local industries for demand-driven training programs, enhancing employability in region-specific sectors. In Gujarat local government worked with diamond industry in Surat to train youth in gem cutting and polishing under customized programs. In Haryana Hero and JBM are engaged as Training Partners.

Cross-border virtual apprenticeships and internships facilitated by NSDC and **Skill India International** with companies in Japan (elderly care), Germany (precision manufacturing), Canada (automated welding). Global exposure will enhance employability, language skills, and cultural adaptability.

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04

From Narsimha's Roar to AI-Hanuman

Why India Must Back Human Creativity

Why this blockbuster feels different: a first-hand take on India's mythoverse

When I recently walked into a cinema hall with my niece last month to watch Mahavatar Narsimha, I expected a quiet evening. Instead, the theatre was brimming—grandparents, parents, schoolchildren, even young adults. As the half-lion avatar of Vishnu roared on screen, my niece clutched my hands in awe. That was the moment it struck me: Indian animation had arrived.

The numbers are compelling. Mahavatar Narsimha has crossed ₹210 crore domestically, the highest ever for an Indian animated film¹. July 2025 was the most successful month at India's box office, registering ₹1,430 crore in collections, with this film leading the charge². Its producers are already building a "Mahavatar Cinematic Universe"—a multi-title franchise accompanied by comics and games—demonstrating that India is finally creating long-term animated IP, not just one-off spectacles.

This momentum mirrors the Government of India's National AVGC-XR Mission, launched in 2022. ³The policy aims to establish India as a "global hub for AVGC," focusing on original IP creation, local studios, talent skilling, and global co-creation. Industry forecasts estimate the AVGC-XR sector could reach \$26 billion by 2030, generating over 160,000 jobs annually if IP development and monetization are actively supported⁴.

Still, the path forward is not without obstacles. First, there's the IP ownership challenge: many studios currently provide backend services for global players, earning little stake in the IP they power. Mahavatar Narsimha proves homegrown mythic IP has massive cultural and commercial potential—but sustainable growth requires tax incentives, capital access, and an IP-aware ecosystem.

Next is skill and capacity building. India's creative talent is vast, but many remain untrained in advanced animation, gaming, and VFX techniques. Though the AVGC-XR Mission proposed industry-academia skilling hubs, implementation remains uneven. Without a skilled workforce, this moment risks slipping away to global competitors.

A broader perspective comes from Infosys co-founder and AVGC evangelist Kris Gopalakrishnan, who said:



Contributed By



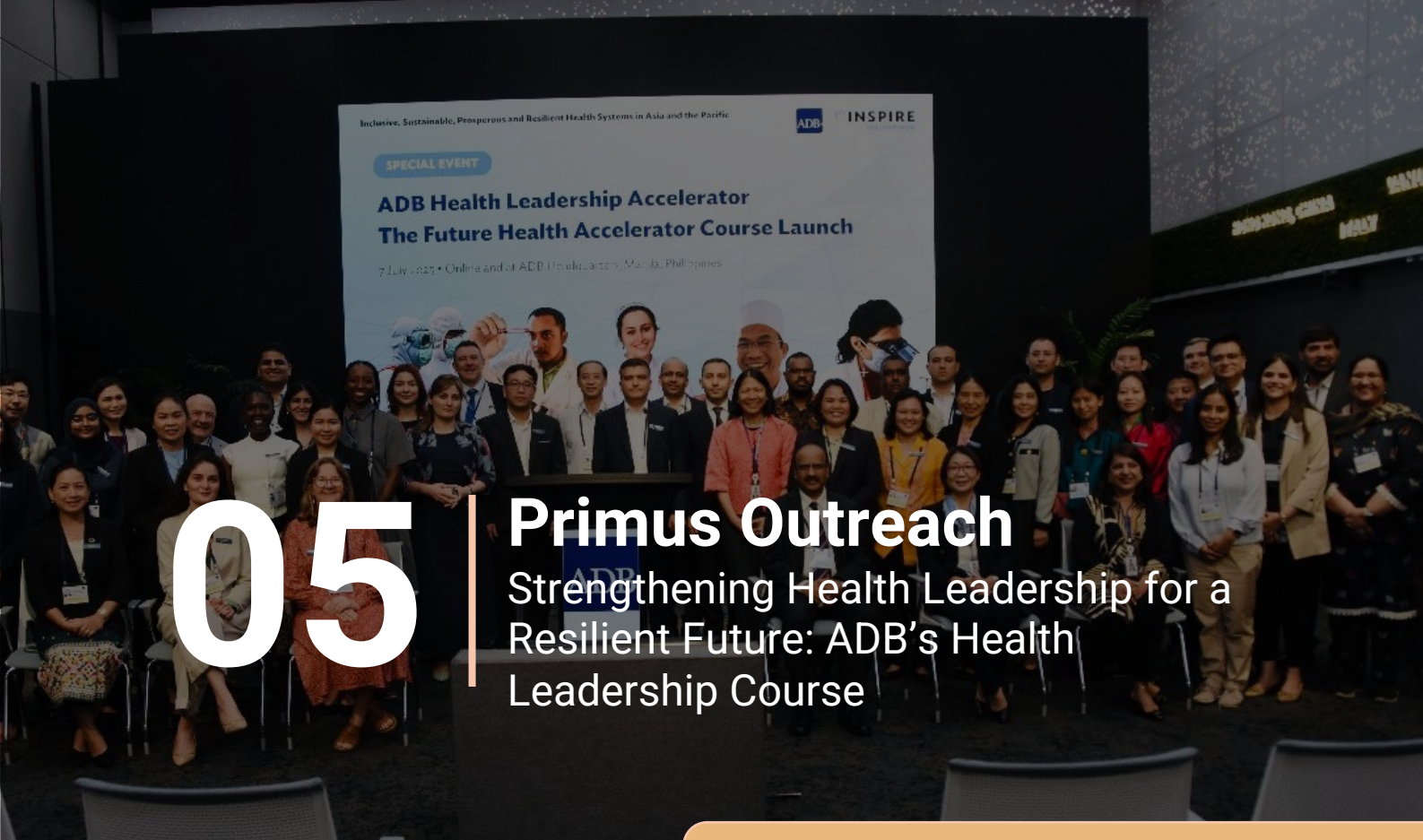
Amit Purohit
Vice President

"I believe we have an opportunity to capture the domestic market and the 8 billion consumers in the world... become wealth creators, job creators, and create leading companies out of India⁵." He urges all stakeholders to become "evangelisers of the opportunity this [AVGC] sector provides." This encapsulates the promise—and responsibility—before us.

Finally, there's the spectre of AI overreach. The announcement of Chiranjeevi Hanuman – The Eternal, touted as the first fully AI-generated theatrical film, sparked outrage⁶. While AI can accelerate tasks like pre-visualization or dubbing, it cannot replicate the heart—voice performances, emotional nuance, cultural depth. Indian mythology deserves storytelling imbued with devotion, not relegated to algorithmic output.

As an adult, I saw Narsimha move my niece not just with visual spectacle but with emotional resonance. That's the power of human-led storytelling. India now stands at a crossroads. Build the "mythoverse" with original IP, skilled creators, and ethical tech use, or surrender our cultural legacy to efficiency.

Mahavatar Narsimha is more than a blockbuster, it's a wake-up call. Let's build our myths by human hands, with human heart.



05

Primus Outreach Strengthening Health Leadership for a Resilient Future: ADB's Health Leadership Course

We live in a world where the threat of an impending health crisis is ever looming. In an ever-evolving scenario like this, the need to build strong, informed, and resilient health systems is of paramount importance. A strong and resilient health system can be built through informed and agile health leadership, which has the ability and prowess to anticipate risks, adopt effective strategies, and mobilize resources effectively.

ADB's Health Leadership Course (AHLIC) was ideated and conceptualized with a vision to empower health leaders and equip them to identify their country specific issues to address the emerging health challenges. The course's major focus was to strengthen the existing health system with a futuristic lens and keep adaptive leadership at the core of andragogy for this course.

Primus Partners in consortium with Public Health Foundation of India and Dalberg Design supported Asian Development Bank on the conceptualization, development and delivery of the ADB Health Leadership Course (AHLIC). The course reflected the region's commitment to tackle the future health challenges with a focus on digital health, pandemic preparedness, emerging trends in healthcare, climate change & one health, health governance and financing. The first cohort of this course was held in conjunction with INSPIRE Health Forum 2025 in Manila, Philippines from 7-15th July 2025. The course witnessed participation from 30+ health policy leaders, representing an equal gender balance from 17 Developing Member Countries in Asia and the Pacific region. The diverse representation stirred dialogues on the need for strategic investment to strengthen national capacities to respond to evolving health challenges.

This covered a wide array of issues ranging from the growing burden of non-communicable diseases (NCDs) to the threat of pandemics while fortifying health systems for long term system strengthening.

Designed and delivered through the collaborative expertise of **Primus Partners, Dalberg Design**, and the **Public Health Foundation of India (PHFI)**, the program combined policy insights, human-centric design, and public health expertise to create a comprehensive and actionable learning experience. The consortia's role was critical in ensuring that content was contextually relevant, globally benchmarked, and deeply rooted in evidence-based approaches.

The course's structure reflected the multidimensional nature of health security, beginning with **Climate Change and One Health** module. Through exploring the interconnections between human, animal, and environmental health, participants learnt to anticipate and manage complex health impacts ranging from emerging zoonotic diseases to the strain on healthcare infrastructure during climate-induced disasters. Modules on climate-resilient healthcare development and disease surveillance empowered

leaders to design systems capable of withstanding both environmental and epidemiological shocks.

Equally vital was the focus on **Health Governance, Delivery, and Financing**. Participants were equipped with practical tools for policy analysis, universal health coverage (UHC) planning, and building public-private partnerships. The ADB "Brain and Bot" chat bot was an interesting AI tool that was introduced to the participants to design projects taking into consideration their country specific needs and priorities in alignment with ADB funding modalities. A stronger grasp of financing models opened pathways for structured health investments from institutions such as ADB, enabling countries to build robust facilities, integrate advanced technologies, and expand service delivery sustainably.

Discussion around relevant health priorities like **Pandemic Preparedness and Emerging Trends in Healthcare** addressed hard-learned lessons from COVID-19. Through scenario-based exercises, participants strengthened their capacity for surveillance, surge planning, cross-border coordination, and risk communication, ensuring transparent and timely responses in future crises.



Digital Health interventions and insights into scalable case studies on telemedicine, AI, and secure and ethical use of health data established the emphasis on quality standards. This ensured that technological adoption translates into equitable and high-quality care across the participating countries.

A distinctive feature of the program was its integration of **cutting-edge information platforms** such as the Institute for Health Metrics and Evaluation (IHME) database, the ADB health chatbot, and European Space Agency tools.

These resources equip policymakers with timely, accurate, and relevant data to inform high-level health system decisions, enabling real-time situational awareness and evidence-based policy formulation for resilience building.

By weaving these themes together, the ADB Health Leadership Course (AHLIC) has fostered a cadre of leaders capable of translating knowledge into national strategies, policy reforms, and sustainable financing models. For the 17 countries represented, this is not merely a training initiative but a commitment towards investment in preparedness, resilience, and health security of millions.

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Primus Partners has been set up to partner with clients in 'navigating' India, by experts with decades of experience in doing so for large global firms. Set up on the principle of 'Idea Realization', it brings to bear 'experience in action'. 'Idea Realization'— a unique approach to examine futuristic ideas required for the growth of an organization or a sector or geography, from the perspective of assured on ground implementability.

Our core strength comes from our founding partners, who are goal-oriented, with extensive hands-on experience and subject-matter expertise, which is well recognized in the industry. Established by seasoned industry leaders with extensive experience in global organizations, Primus Partners boasts a team of over 250 consultants and additional advisors, showcasing some of the finest talent in the nation.

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