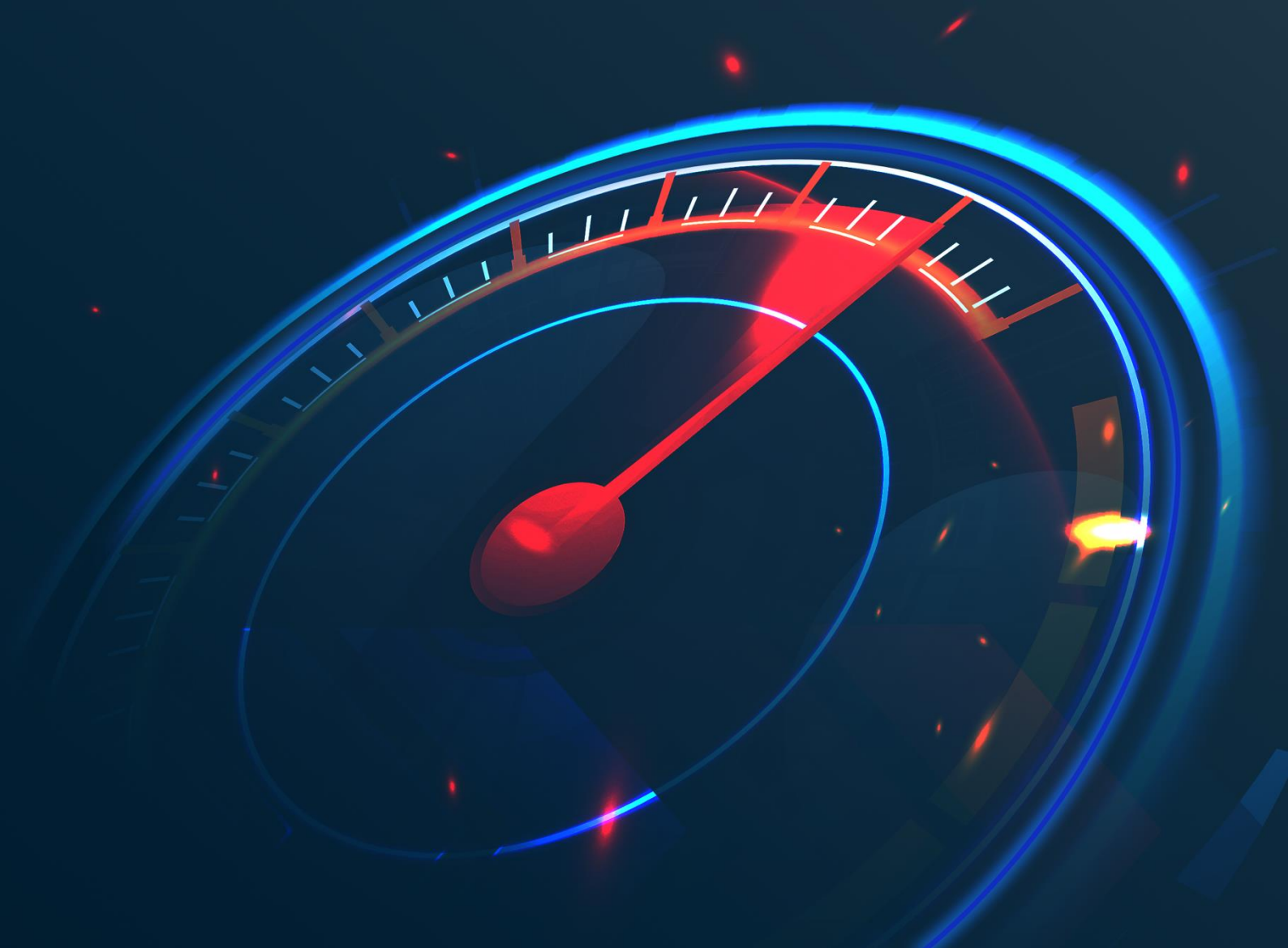


MOVING THE NEEDLE

THE JOURNEY FROM POLICY
TO IMPLEMENTATION



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Biren Ghose – Managing Director
Asia Pacific & Global Excom Member
Technicolor Group

Dear readers,

In the October 2024 edition of Moving the Needle, we take this opportunity to highlight the pivotal topics shaping our world today. This month, we delve into the intricacies of laying the roadmap for economic efficiency through logistics, exploring how optimizing supply chains can drive sustainable growth across sectors.

We also examine the QUAD partnerships, shedding light on the strategic implications for member nations and the wider international community. Further, we see growth driven with Decision Intelligence, how India's hypersonic missile revolution with Project Vishnu, is a landmark for national security and technological advancement. In the financial realm, we also assess the U.S. Federal Reserve rate cuts and their potential impact on India and global markets, providing a comprehensive overview for stakeholders.

Flip to our Expert Speak section, where you'd be thrilled to see through the eyes of Biren Ghose, Managing Director Asia Pacific and Global Excom Member, Technicolor Group on how they have delivered award-winning projects, from The Lion King and The Jungle Book to Top Gun: Maverick and the Bond movies, and on what's next in VFX. Read on to uncover the opportunities that are animating ahead for the AVGC Industry!

Happy reading!

Sincerely,
Moving the Needle Team



1

Primus Outreach

Knowledge Partnership for the Climate and Health Solutions (CHS) India Conclave



On September 25-26, 2024, the inaugural Climate and Health Solutions (CHS) India Conclave brought together over 330 experts from across states in India to address the pressing intersection of climate change and public health. Hosted by the Ministry of Health and Family Welfare, Government of India, in collaboration with the Asian Development Bank (ADB) and supported by Primus Partners as the Knowledge Partner, this landmark conclave featured nine deep dive roundtable sessions. These sessions tackled critical issues such as Heat Mapping, Early Warning Systems, Air Pollution, and Climate Resilient Healthcare Infrastructure. The conclave aimed to foster collaboration and innovation, emphasizing the urgent need to integrate climate action into public health strategies to shape a healthier and resilient future for India.

At Primus Partners, we recognize the urgency of addressing the climate and health nexus. Confronting these twin emergencies is undoubtedly the most critical fight of our lifetimes. The call for action and package of CHS conclave outcomes

includes stimulating dialogue on a nuanced understanding of climate and health challenges and tailored policies for different states and stakeholders in the country, co-creating a comprehensive roadmap and implementation plan to formulate robust policies, initiatives and innovations, identifying core climate and health process, product and technology innovations that can be piloted, scaled and mainstreamed in national and sub-national health action plans, and to initiate public and private sector engagement in designing and delivering climate resilient healthcare.



2

Economy

Laying the roadmap for Economic Efficiency through Logistics efficiency



India, poised for rapid growth in the coming decades, relies heavily on its transportation and logistics sector to support its expanding economy. As of 2022, the modal split in freight movement illustrates a significant imbalance: 66% via road, 31% via rail, with shipping and air accounting a mere 3% and 1%, respectively. Benchmarking its against developed European nations and the like including China reveals stark contrasts in modal shares and infrastructure utilization, especially with respect to maritime and inland waterways network utilisation, which in case of France is 66%, Belgium at 47% Germany at 29%, and China at 15%. India's underutilization of waterways, for instance, stands in stark contrast to these nations

where inland water transport plays a more substantial role in freight movement. Learning from their successes in integrating diverse transport modes can inform India's strategies for achieving a more balanced and efficient logistics network. This distribution not only highlights operational inefficiencies but also underscores the urgent need for strategic infrastructure development and policy reforms to enhance overall efficiency and competitiveness.

Furthermore, whilst freight transported via air by volume is about 1%, by value it transported about 35% of the global cargo. In further comparison, coastal shipping and rail freight (in range of INR 0.3 to INR 1.6/Metric ton km as of 2021) could together transport the bulk of cargo with operating costs significantly lower in INR per tonne-kilometre basis compared to road and air, which are INR 3.6 and INR 18/Metric ton km, respectively. The dominance of road transport, despite its higher costs compared to rail and waterways, reflects historical infrastructural gaps and logistical challenges. To address these issues, initiatives such as the PM Gati Shakti master plan, which gives an impetus to enhance multimodal connectivity and alleviate logistics costs; Bharatmala, Sagarmala programme, 100% railway electrification, amongst other key initiatives lay the foundation for advancement that the sector needed at this hour. These projects aim to bolster road, rail, and maritime infrastructure, thereby enhancing the connectivity manifolds whilst also reducing logistics costs over time.

2

Economy (Contd.)

However, the roadblocks to effectiveness of these initiatives can be attributed to delays in land acquisition, regulatory clearances, and the absence of a streamlined tax and uniform regulatory framework across modes. These hurdles have inhibited private sector participation and investment, crucial for scaling up infrastructure development to meet growing demand efficiently. To capitalize on its economic potential and achieve sustainable growth, India must prioritize several key policy measures:

i. Streamlined Regulatory Environment:

Implementing a uniform and simplified tax regime and regulatory framework will reduce bureaucratic hurdles and enhance ease of doing business. This will encourage greater private sector involvement in infrastructure development; for instance, an all in one-license that could be used for multi-modal freight transportation pan-India, with fiscal and other tax incentives to the users.

ii. Investment in Rail and Waterways:

Leveraging the cost-effectiveness of rail and water transport, which are significantly cheaper per-ton-km compared to road and air, requires substantial investment. Enhancing connectivity and capacity in these sectors will rebalance the modal split, reducing logistics costs and carbon emissions; such as the Dedicated Freight Corridors (DFCs) as a core element of the National Rail Plan 2030 aims to increase the rail share to upto 45% over the next 10 years by moving over 70% of the rail freight to these

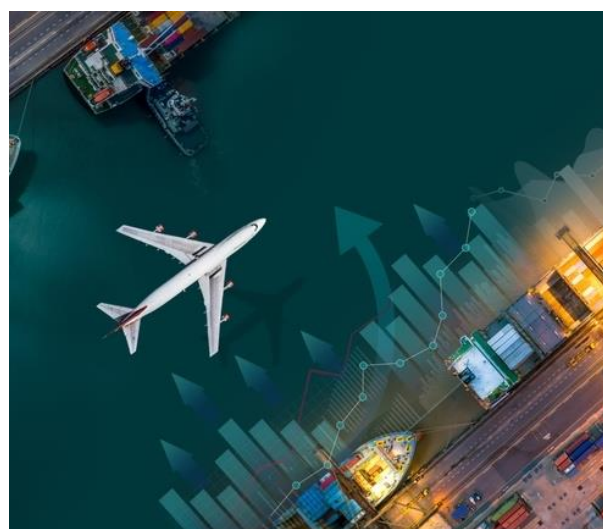
corridors, of which ~80% are already operational and land acquisition is almost complete for the remainder.

iii. Enhanced Efficiency and Integration:

Integrating various modes of transport seamlessly is crucial for improving efficiency. This includes improving last-mile connectivity, leveraging technology for real-time tracking and management, and investing in multimodal logistics parks; as is under the purview of the GatiShakti Multi-Modal Cargo Terminal Policy.

iv. Promotion of Sustainable Practices:

Encouraging the adoption of sustainable practices, such as promoting the use of electric vehicles and enhancing energy efficiency in transport, will mitigate environmental impacts while reducing operational costs; as is being done by the Sagarmala through reduction in carbon emissions by 12.5 MTPA through transportation.



2

Economy (Contd.)

The National Logistics Policy 2022 underscores the ultimate goal of alleviating the logistics cost-to-GDP ratio from the present 14-18% in order to meet global benchmarks. Further, the government is working to amplify the country’s total port handling capacity by almost 300% to over 10,000 MTPA and encouraging the domestic shipping industry.

As India gears for attaining the Viksit Bharat goal by 2047, addressing the challenges in its transportation and logistics sector remains critical.

By prioritizing infrastructure development, implementing an all-encompassing supportive regulatory ecosystem of multimodal logistics and enabling Ease of Doing Business to maintain investor interest and participation, India can leverage logistics efficiency as a master key to unlock its full economic potential. A well-connected, efficient, and sustainable transport system will not only ensure efficiency and efficacy but also stand to bolster India’s economic resilience and competitiveness in the global market.



3

Geopolitics

QUAD: A force for global good?



The Chinese have been vocal in their opposition to the QUAD since its inception in 2007. They've termed it a 'US tool to contain Beijing' and a 'Headline-grabbing idea that will dissipate like foam in the sea'. However, the QUAD's initiatives speak otherwise, significantly, since it was elevated to a leader-level summit four years ago.

Of course, like every international grouping, it expresses concern about geopolitical challenges, ranging from coercive and intimidating manoeuvres in the South China Sea to Myanmar's worsening political and security situation to its shared interest in achieving peace and stability in the Middle East.

But with that said, QUAD's commitment to delivering tangible benefits to the nearly 2 billion

people it represents in the Indo-Pacific while maintaining international order based on the rule of law is commendable. The recent QUAD Leaders at President Biden's hometown, Wilmington, Delaware, cemented this commitment through important developmental announcements for the Indo-Pacific and the global community.

Notable among them are the QUAD Cancer Moonshot Initiative, the QUAD Principles for Development and Deployment of Digital Public Infrastructure, India's new initiatives under the QUAD STEM Fellowship, and enhanced support for the QUAD Partnership for Cable Connectivity and Resilience.

3 Geopolitics (Contd.)

Before we delve into them, a reminder that QUAD stands for 'Quadrilateral Security Dialogue', a diplomatic partnership between Australia, India, Japan, and the United States. QUAD's leadership calls it a 'force for good' that benefits partner countries across the Indo-Pacific, including in the Pacific, Southeast Asia, and the Indian Ocean Region, and with respect for the regional leadership of ASEAN, Pacific Island Forum (PIF), and Indian Ocean Rim Association (IORA).

QUAD Cancer Moonshot Initiative

The initiative's efforts are centred around treating cervical cancer—a largely preventable disease that is the third leading cause of cancer deaths among women in the Indo-Pacific region. With less than 10% of women having undergone recent screening and fewer than one in 10 women having availed of the human papillomavirus (HPV) vaccine, the Cancer Moonshot initiative will serve to strengthen the overall cancer care ecosystem to save hundreds of thousands of lives in the coming decades.

All QUAD countries have pledged sizeable amounts to prevent, detect, treat, and alleviate the impact of preventable cervical cancer. India, on its part, has developed its cervical cancer vaccine and new treatment protocols with the assistance of AI and will contribute 40 million vaccine doses to Indo-Pacific countries through GAVI and QUAD. India will also contribute \$7.5 million for sampling kits, detection kits, and vaccines and offer technical assistance on DPI for cancer screening through its \$10 million contribution to WHO's Global Initiative on Digital Health.

QUAD Principles for Development and Deployment of Digital Public Infrastructure (DPI)

DPI gained global acceptance after India's G20 Presidency defined it and convinced the world of its transformative potential in accelerating the achievement of the Sustainable Development Goals (SDG) 2030. QUAD members and G20 member countries recognise the rapid pace at which DPI deployment will occur in public service delivery and have laid down principles for developing and deploying DPI.



3

Geopolitics (Contd.)

While QUAD wants governments to deploy DPI to close digital divides, the Principles lay down that DPI must focus on inclusivity in terms of avoiding algorithmic bias, respecting human rights in all stages of deployment, enforcing IPR for technological holders, building open standards for interoperable use and a technological neutral approach, and most importantly, deploying DPI to achieve SDGs.

QUAD STEM Fellowship

The fellowship extends QUAD’s commitment to people-to-people initiatives. It is working on building the next generation of science, tech, and policy leaders from QUAD countries and ASEAN nations. With India recognising the importance of fostering the culture of R&D through its ongoing domestic programme, ‘Anusandhan National Research Foundation,’ has extended this mindset to the QUAD fellowship by awarding a \$500,000 scholarship through 50 QUAD scholarships to pursue a four-year undergraduate engineering programme at a Government of India-funded technical institution.

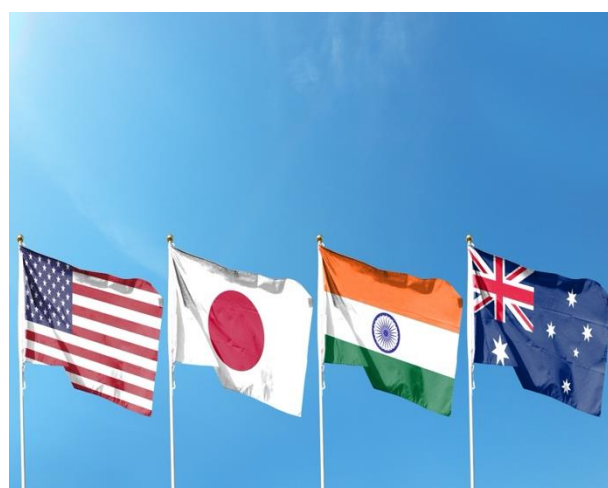
QUAD Partnership for Cable Connectivity and Resilience

Building on the 2023 Commitment to quality, resilient infrastructure, QUAD countries and like-minded partners have extended more than \$140 million to undersea cables and conducted more than 1300 capacity-building training to Indo-

Pacific telecom officials to support Pacific Island countries with access to telecommunication cable connectivity by 2025. In the Indo-Pacific, India will focus on conducting a feasibility study to examine expanding undersea cable maintenance and repair capabilities.

These broad initiatives, ranging from health to DPI to education to infrastructure, reflect QUAD’s genuine commitment to being a force for good. With international relations turning leader-centric, QUAD will need to hold steady with the outgoing leadership of the US President and the Japanese Prime Minister and reestablish close leader-to-leader cohesion again.

However, PM Modi’s statement that ‘QUAD is here to stay, to assist, to partner and to complement’ is a reassuring message in a geopolitically turbulent world where state and non-state actors constantly challenge forces for good.



4

Infrastructure

GIFT City: A Comparative Analysis with Global Financial Hub

Gujarat International Finance Tec-City (GIFT City), India's first operational International Financial Services Centre (IFSC), aims to compete with established global financial hubs like Singapore, Dubai, and London. This analysis evaluates GIFT City's strengths and challenges, focusing on its potential to transform India's financial landscape and position the country as a major player in international financial services.

GIFT City leverages several key advantages that position it as a promising contender in the global financial landscape:

GIFT City benefits from a streamlined regulatory environment designed to attract global financial firms. The establishment of the International Financial Services Centres Authority (IFSCA) as a unified regulator simplifies compliance and operations for businesses. Significant tax incentives, including a 100% tax exemption for the first 5 years and 50% for the next 5 years for IFSC units, enhance its attractiveness. The ease of doing business is further improved by single-window clearance systems.

The strategic location of GIFT City provides a crucial time zone advantage, bridging the gap between Asian and Western financial markets. Its proximity to major Indian financial centres like Mumbai and Ahmedabad allows for seamless integration with the domestic economy while



serving as a gateway for international finance. This strategic positioning enables 24/7 global operations and facilitates cross-border transactions. The city is designed to accommodate 500,000 direct jobs and an equal number of indirect jobs.

Compared to established global financial centres, GIFT City offers significantly lower operational costs. Real estate, labour, and utilities are more affordable, providing a cost advantage for businesses. This cost-effectiveness, combined with tax incentives, positions GIFT City as an attractive alternative for companies looking to optimize their operational expenses.



Infrastructure (Contd.)

Despite its promising outlook, GIFT City faces several hurdles in its journey to become a globally competitive financial hub:

A. Limited Ecosystem Maturity: As a relatively new financial centre, GIFT City's ecosystem is still developing. The range of financial products and services available is limited compared to mature hubs. There is a need for more diverse offerings, including sophisticated derivatives markets and alternative investment options, to attract a wider range of global players.

B. Talent Pool Constraints: Attracting and retaining top global talent remains a significant challenge. The availability of skilled professionals with international financial expertise is limited. Addressing this requires focused efforts on skill development programs and creating an environment attractive to global finance professionals.

C. Brand Recognition: GIFT City currently lacks the international visibility and reputation of established financial hubs. Building a strong global brand and recognition as a reliable and sophisticated financial centre will take time and consistent effort.

D. Connectivity Issues: Air connectivity to GIFT City remains a constraint, with limited direct international flights potentially impacting ease of access for global business travellers.

E. Regulatory Uncertainties: Despite efforts to create a distinct regulatory environment, potential conflicts with onshore Indian regulations persist. Clarity on the interaction between IFSC regulations and broader Indian financial laws is needed to instil confidence in international investors and institutions.

To gauge GIFT City's progress and potential, it is compared with the Dubai International Financial Centre (DIFC), an established and successful financial hub in the region. GIFT City's regulatory framework, while progressive, is still evolving compared to the well-established system in DIFC. DIFC benefits from a longer operational history and a more comprehensive legal framework based on common law principles. However, GIFT City's recent regulatory reforms, including the establishment of IFSCA, are closing this gap. Both centres offer attractive tax incentives, with GIFT City potentially offering more extensive exemptions for certain activities.



4

Infrastructure (Contd.)

In terms of infrastructure and technology, both GIFT City and DIFC boast state-of-the-art facilities and smart city features. DIFC, with its longer operational history, has a more developed physical infrastructure and a wider range of amenities. GIFT City, being newer, incorporates more recent technological advancements in its design. Both centres prioritize digital connectivity and fintech innovation, though DIFC currently hosts a larger number of fintech firms.

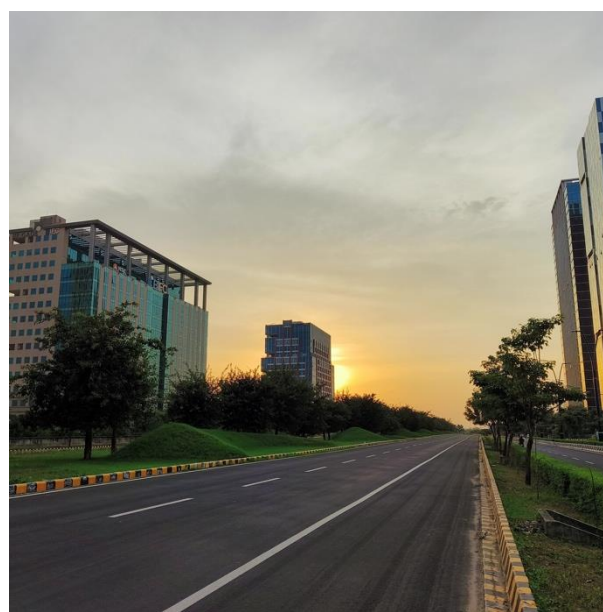
DIFC has a significant advantage in terms of its established talent pool and diverse ecosystem of financial firms. It hosts over 2,500 active registered companies, including 17 of the world's top 20 banks. GIFT City is actively working to build its talent base but currently lags behind in terms of the depth and breadth of available skilled professionals and the presence of major global financial players.

Regarding market access and global connectivity, DIFC benefits from Dubai's position as a global aviation hub, offering superior international connectivity. It also has a longer track record of facilitating access to Middle Eastern and African markets. GIFT City, while strategically located, is still developing its global connectivity. However, GIFT City offers unique advantages in terms of access to the large and growing Indian market, which could be a significant draw for international firms looking to tap into India's economic potential.

GIFT City demonstrates significant potential as an emerging international financial centre, with notable strengths in its regulatory framework, strategic

location, and cost competitiveness. These advantages position it well to capitalize on India's growing economic influence and serve as a bridge between global capital and the Indian market. However, GIFT City also faces substantial challenges in ecosystem maturity, talent attraction, and global recognition.

To enhance its position, GIFT City should focus on accelerating the development of a diverse financial ecosystem, implementing targeted programs to attract and develop skilled talent, boosting international marketing efforts, improving air connectivity, and clarifying regulations. With sustained focus on these areas, GIFT City has the potential to emerge as a significant player in the global financial services landscape, leveraging India's economic growth story and offering a unique value proposition to international businesses seeking access to one of the world's fastest-growing economies.



5

Technology

From Data to Decisions: Driving Growth with Decision Intelligence



Today, data is everywhere. But its not enough to collect data—the real key driver is using it to make smart decisions. That is where Decision Intelligence (DI) comes in. In simple terms, DI is all about turning data into real, practical actions. It combines the power of data, human understanding and intelligent systems to help people and businesses make better decisions.

Why Decision Intelligence is on the Rise

We are living in a world that is producing staggering amounts of data. By 2025, the total amount of data worldwide will be expected to reach 181 zettabytes—an amount hard even to imagine. In

India, this data growth is driven by the widespread use of the internet, mobile devices and government projects like Digital India. This creates a lot of data and businesses are beginning to realize that they need more than just analytics—they need a way to make real-world decisions based on this data and that is precisely what DI helps them do.

Instead of just analyzing past trends, DI aims to help businesses determine the best next steps. For example, during the pandemic, companies using DI tools could adapt more quickly, predicting supply shortages and shifting their sourcing plans, while others struggled to keep up.

5 Technology (Contd.)

The Impact on India's Growth

The potential of Decision Intelligence for India's growth is massive. According to NASSCOM, India's AI and data analytics industry could add \$500 billion to the GDP by 2025 and DI is right at the center of this. By helping businesses cut costs, become more efficient and better understand their customers, DI directly drives economic growth.

For example, agriculture. With DI, farmers can optimize their production, predict yields more accurately and reduce wastage, ultimately improving their earnings. The healthcare sector is also benefiting—DI tools can predict disease outbreaks, help allocate resources and even personalize treatment for patients, leading to better care at a lower cost.

Creating Jobs for the Future

DI is not just about business gains; its also about creating new jobs. As more companies begin to use DI, they need people who know how to work with data and understand the business side. A recent report suggests that AI and DI could create around 2 million jobs in India by 2025. These jobs are not just for data experts—there is a growing need for people who can bring together tech and business, making data understandable and usable for decision-makers.

Boosting India's Growth Story

India's digital progress has set the stage for using DI in a big way. Initiatives like UPI, Aadhaar and the Unified Health Interface have generated massive datasets. DI can help use this data to make welfare programs more efficient, manage cities better and improve education. Moreover, the government's push for digital public services means that DI has even more room to make an impact, helping tackle social challenges in an innovative, data-driven way.

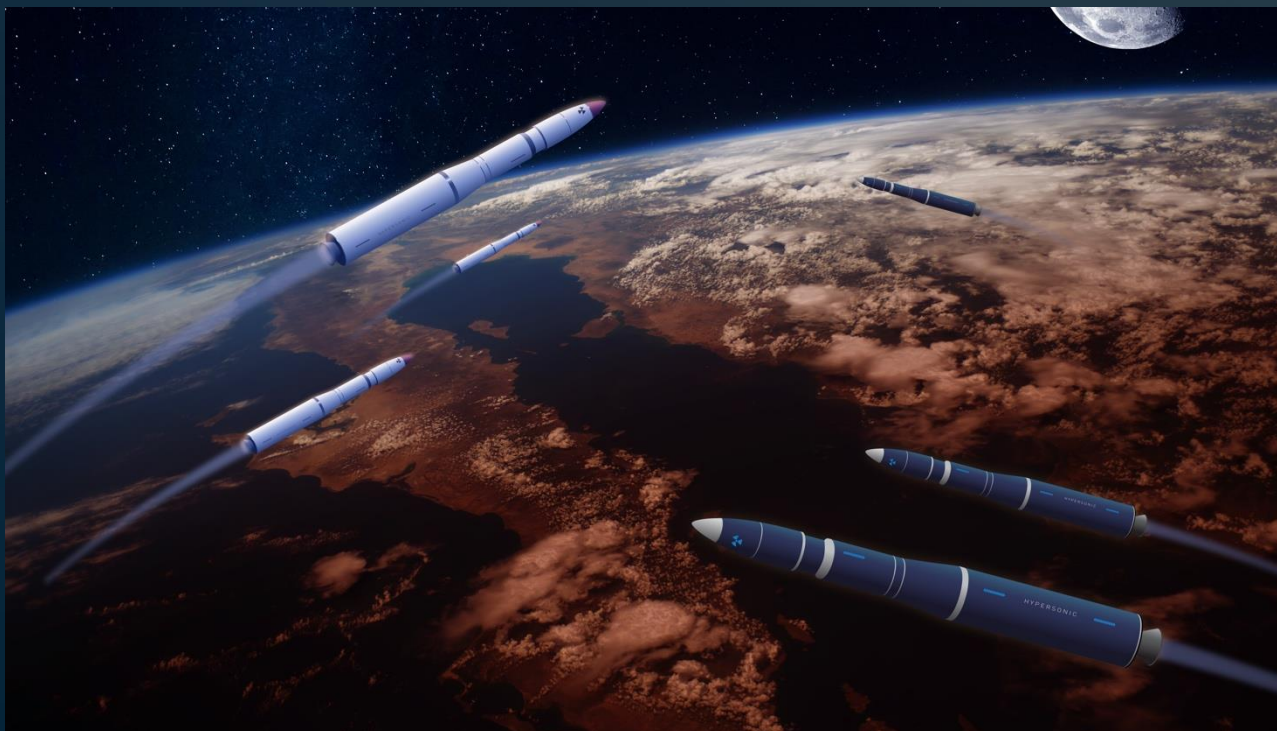
Small and medium enterprises (SMEs)—a big part of India's economy—can also benefit from DI. By using data more effectively, these businesses can grow faster and contribute more to the country's GDP.

Decision Intelligence isn't just a new trend—its a practical approach to transforming how organizations work. It shifts the focus from subjective judgement to data-backed actions that deliver accurate results. DI offers a powerful tool for India to take advantage of its growing digital landscape, boost productivity and fuel economic growth. As businesses, government agencies and even SMEs start using DI, we will likely see a significant impact on jobs, the economy and everyday life, establishing India as a key player in digital advancements.

6

Aerospace & Defence

India's Hypersonic Missile Revolution with Project Vishnu



India's defence sector is set to witness a transformative leap with the launch of Project Vishnu, a highly ambitious initiative spearheaded by the Defence Research and Development Organisation (DRDO). This project is focused on the development of a hypersonic cruise missile, signalling India's commitment to enhancing its strategic capabilities. Hypersonic weapons, which can travel at speeds greater than Mach 5 (five times the speed of sound), represent the next frontier in global missile technology.

Technological Journey

Project Vishnu builds on DRDO's earlier success with the Hypersonic Technology Demonstrator Vehicle (HSTDV), which was a milestone in the development of scramjet engines. The success of

HSTDV validated the essential technologies required for hypersonic flight, including propulsion and aerodynamic control at extreme speeds. DRDO is now working on the advanced fuel tank and has also commenced the fabrication of the cruise vehicle.

The first missile under Project Vishnu is planned to be a surface-to-surface hypersonic cruise missile with an estimated range of 2,500 km, expected to enter service as early as FY 2024-2025. The missile leverages scramjet engine technology to maintain hypersonic speeds throughout its flight trajectory. The system's high-speed flight, low-altitude trajectory and high manoeuvrability will make it extremely difficult to intercept using current missile defence systems.

6

Aerospace & Defence (Contd.)

Strategic and Technological Significance

The strategic value of hypersonic missiles lies in their speed, manoeuvrability, and ability to evade modern air defence systems, which makes them a game-changer in both offensive and defensive military operations. These missiles can cover vast distances in minutes, delivering precise strikes on high-value targets. For India, the development of this technology addresses two critical defence needs:

1. **Deterrence:** In the context of evolving regional threats, particularly from China and Pakistan, hypersonic missiles would provide India with the ability to respond quickly and effectively to any aggression. A missile that can strike targets within minutes offers rapid response capabilities, allowing India to shift the balance in potential conflict scenarios. It also establishes a strong deterrent, reinforcing India's position in the nuclear and conventional arms race.
2. **Technological Edge:** As China, Russia, and the U.S. continue to push their hypersonic programs, India's entry into this domain would prevent strategic lag and ensure the country maintains parity with its peers. Hypersonic missiles will enhance India's second-strike capability, complementing its ballistic missile systems.

Policy and Global Implications:

With the world moving towards hypersonic arms, Project Vishnu is not just a defence milestone but also a technological leap. This program aligns with India's broader defence modernization agenda, reinforcing its security infrastructure against evolving threats. However, as India strengthens its missile arsenal, it must engage diplomatically in global forums to ensure strategic stability.

- **Infrastructure Investment:** The hypersonic missile program requires substantial investment in cutting-edge research facilities, testing ranges, and production capacities to ensure timely deployment.



6

Aerospace & Defence (Contd.)

• **International Diplomacy and Arms Control:**

India will need to diplomatically engage with global powers, balancing its hypersonic ambitions with non-proliferation efforts. Hypersonic weapons lower the reaction time in conflict scenarios, increasing the risk of rapid escalation, require responsible handling in international arms control discussions. India must position itself as a responsible nuclear power while advocating for the creation of global norms around the use of hypersonic weapons.

• **Technology Safeguards:** Hypersonic missile technology is highly sensitive, and its development raises concerns around espionage

and technology theft. India's defence establishment must take measures to safeguard research data and maintain strict export controls.

Project Vishnu is poised to transform India's defence landscape. By securing its place in the hypersonic arms race, India not only boosts its deterrence capabilities but also ensures being a critical player in the future of global military technologies. The successful implementation of Project Vishnu will mark India's entry into the world's powerful nations—alongside the U.S., China, and Russia—developing cutting-edge hypersonic technology.



7

Healthcare

From Crisis to Comeback: Public Health Strategies Post-Flood



Floods are among the most devastating natural disasters, causing significant loss of life, property, and infrastructure. The aftermath of floods presents a unique set of challenges, particularly in the realm of public health. Floodwaters often carry a mix of contaminants, including sewage, chemicals, and debris, which can lead to widespread health issues. The immediate impact includes injuries and fatalities, but the long-term effects can be even more severe, with outbreaks of waterborne diseases, disruptions to healthcare services, and mental health crises.

Indian/Global context

Globally, the frequency and intensity of floods have

increased due to climate change, urbanization, and inadequate infrastructure. In 2022 alone, floods caused over 7,400 deaths worldwide, primarily due to drowning and injuries.

India, with its diverse geography and climate, is particularly vulnerable to floods. A report reveal that floods have claimed over a hundred thousand lives in the country and resulted in a total economic loss of 4.69 trillion INR during the 1952–2018 period. The 2018 and 2019 Kerala floods underscored that even a robust healthcare system struggled to address the extensive public health crises triggered by natural disasters.

7 Healthcare (Contd.)

Response strategies

Response strategies for post-flood management should begin with implementing advanced surveillance systems to monitor environmental and health impacts, alongside using enhanced surveillance GIS tools to identify affected areas for targeted resource allocation. Immediate actions must include evacuations of vulnerable populations and the establishment of relief camps providing food, clean water, and essential medical supplies. Preventive healthcare measures against waterborne diseases should be prioritized, along with mental health support systems that offer psychological first aid to help survivors cope with emotional trauma. Long-term recovery plans should focus on rebuilding infrastructure and strengthening healthcare systems in affected regions. Community engagement through preparedness initiatives, such as mock drills, is essential to enhance resilience. Also, effective communication via social media and local networks is crucial for disseminating vital health and safety information quickly.

Case Study 1: Kerala Floods

The Kerala floods of 2018 and 2019 is a case study in effective post-flood management as state collaborated with various national and international agencies to implement measures. Over 483 people died, 14 are missing and 140

were hospitalized while [The Economic Times](#) reported that 33,000 people were rescued. Enhanced surveillance GIS systems were put in place to monitor and control disease outbreaks, map flood-affected areas, track disease spread and allocate resources efficiently. Following the Kerala floods, there was a surge in leptospirosis cases due to contaminated water. In response, the Kerala government provided treatment on front lines to rescue workers and exposed survivors. The state government deployed approx. 17650 trained mental health workers across the state and set up a free helpline for counselling to flood victims to address mental health issues.



7 Healthcare (Contd.)

Case Study 2: Andhra floods, September 2024

In late August and early September 2024, Andhra Pradesh faced unprecedented flooding due to heavy rainfall caused by a low-pressure system in the Bay of Bengal. The state recorded a 2200% excess rainfall⁵, with NTR District receiving the highest rainfall of 329.7 mm. The overflow of the Krishna River and Budameru rivulet led to severe flooding in Vijayawada and other areas, affecting over 6.4 lakh people, with 32 deaths and widespread destruction. Agricultural land (1.80 lakh hectares) and infrastructure, including roads, power networks, and water systems, were severely impacted, leading to estimated losses of Rs. 6,880 cr. The government responded with large-scale relief operations, deploying over 50 rescue teams, helicopters, and boats to evacuate citizens and distribute 5.4 million food packets and essential supplies. A total of 214 relief camps housed over 45,000 displaced people, and medical camps were established.

Floods bring immense challenges, due to the contaminants and diseases they spread. To tackle these effectively, we need both immediate actions and long-term plans. Strengthening our healthcare systems, improving early warning mechanisms,



and ensuring clear communication are vital. By learning from past experiences like the Kerala and recent Andhra Pradesh floods, we can better prepare for the future, making our communities more resilient and informed. Together, we can face these challenges and protect our loved ones.

8

Financial Services

U.S. Federal Reserve Rate Cuts: Impact on India and Global Markets



The U.S. Federal Reserve's decision to cut interest rates by 50 basis points for the first time in four years has significant implications for both the American economy and global markets, including India. This rate cut marks a pivotal shift in U.S. monetary policy, creating ripple effects that will influence financial markets, investment flows, and currency dynamics, ultimately impacting the global economy and, in turn, India's economy as well.

Rationale behind the Interest Rate Cuts

The Federal Reserve typically reduces interest rates to stimulate economic activity, particularly in response to weak growth, sluggish inflation, or external risks like trade tensions. The recent rate cut primarily address the following:

- Rising unemployment and slowdown in business activity
- Economic uncertainty driven by geopolitical tensions are usually geared

Impact on India's Financial Markets

While the full extent of the impact on the Indian economy cannot be foreseen, the overall impact will depend on various factors, including labour rates, inflation, and unemployment. Nonetheless, the Fed's rate cut may have the following effects on the Indian economy:

- **Increased Foreign Investment in Capital Markets:** Lower returns on U.S. assets make them less attractive to global investors,

8

Financial Services (Contd.)

prompting foreign (especially institutional) investors to seek higher returns in emerging markets like India. With interest rates projected to drop further, India is expected to continue attracting foreign capital, supported by its strong economic growth.

- **Global Liquidity:** Lower interest rates in the U.S. make borrowing cheaper for businesses, individuals, and financial institutions. This can lead to increased borrowing and spending, both domestically and internationally, contributing to higher liquidity in the global financial system.
- **Impact on Specific Sectors:** The IT sector in India may experience an influx of foreign investment due to favourable global conditions. However, the appreciation of the Indian Rupee could negatively impact earnings from contracts priced in U.S. dollars. Additionally, the manufacturing sector may benefit from increased foreign capital, while the infrastructure sector stands to gain from lower borrowing costs that facilitate project financing.
- **Easier Repayment of Loans in USD:** Indian companies with dollar-denominated loans may benefit from lower interest rates, reducing debt servicing costs and freeing up capital for domestic investments.
- **Strengthening of the Indian Rupee:** As foreign capital enters Indian markets, demand for the Indian Rupee may increase as investors convert

foreign currencies into INR. This could strengthen the Rupee against the U.S. dollar. In 2019, the Rupee appreciated by 2.5% after a series of Fed rate cuts.

The Way Forward for India

India can leverage the Fed's rate cuts by creating a more favorable environment for foreign investors. Improving the ease of doing business, particularly in high-growth sectors like infrastructure, technology, and manufacturing, could attract more foreign capital.

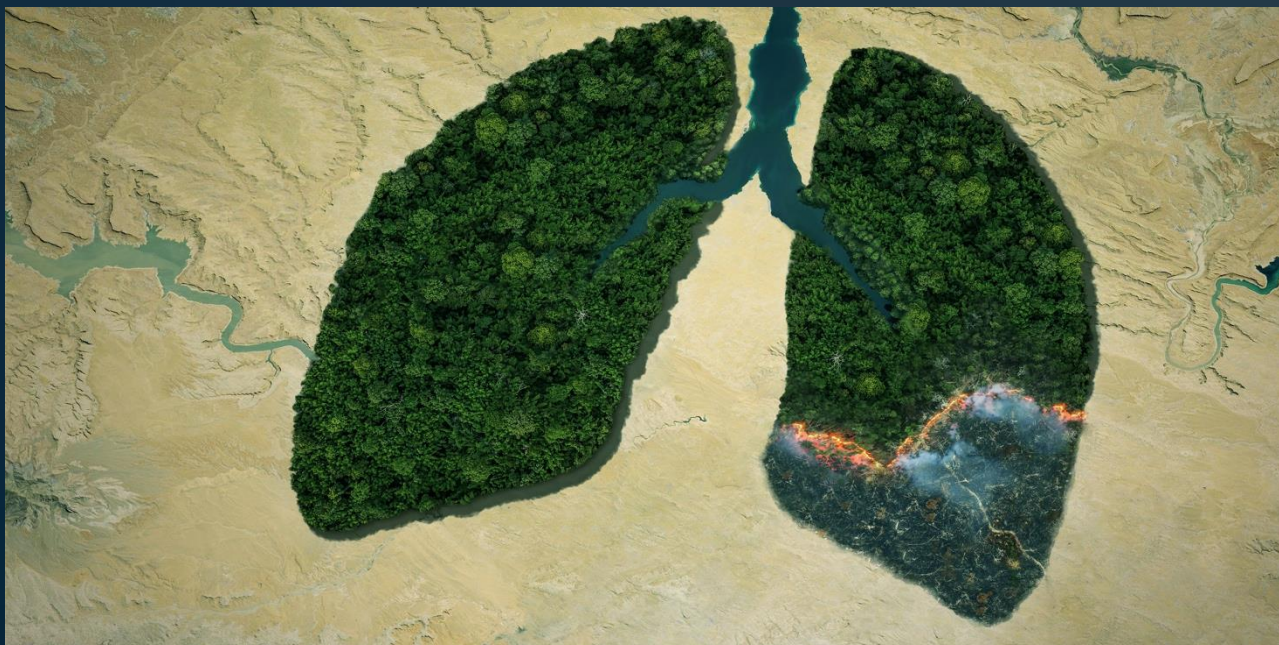
India must focus on fostering capital inflows and maintaining monetary stability to maximize the benefits of this global development. Further cuts by the US Fed will determine the impact and next steps for India, influencing how effectively the country can navigate these economic changes. Given this, the RBI must strike a delicate balance between fostering growth and controlling inflation.

The announcement of new guidelines for SROs by RBI signals a new, more structured future for finance in the country. While there are issues to keep note of, as well as a need for regular monitoring, these developments are undoubtedly a positive step in the collective representation of firms in fintech and NBFCs and allow them to be part of regulatory frameworks in a more concise and unified manner.

9

Impact

Mental Health & Climate Change –
the Known & Unknown



How Climate Change is shaping our minds

The effects of climate change on human health are a proven thing. WHO estimates climate change to be accountable for 250,000 additional deaths per year during 2030–2050 which can be attributed to extreme weather-induced mortality and morbidity and the global expansion of vector-borne diseases. Climate change related acute hazards (floods, cyclones etc.) directly affects the mental health and psychosocial outcomes in an individual through direct and indirect pathways, biological pathways, cognitive pathway, social pathway and emotional pathway.

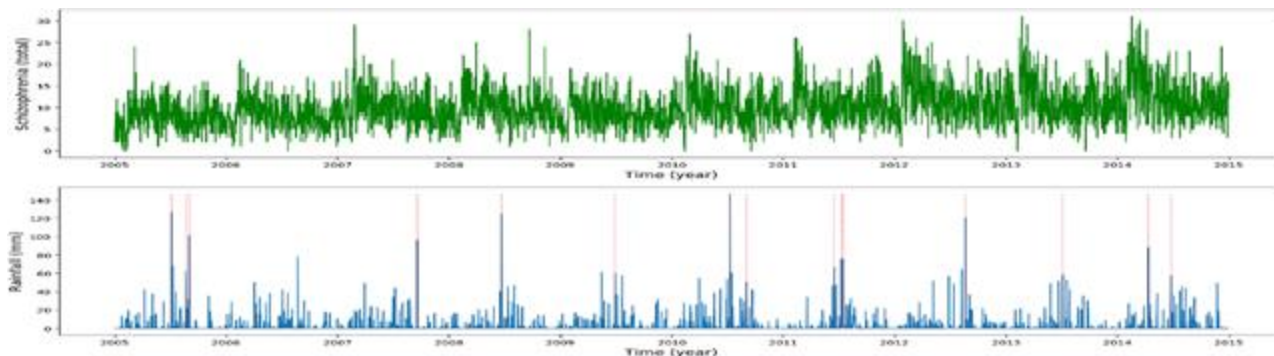
The direct implications are due to acute exposure to some disaster including floods, storms, fires, earthquakes etcetera. In addition to the direct effects of environmental pollution and natural

disasters or extreme weather events, climate change is also associated with indirect and systemic effects on health.

Scoping review in 2021 found:

- Increased rates of hospital admission and psychological distress whenever there were incidences of heat waves
- Increase of major depressive disorder incidence
- Reduced positive emotions like happiness, increased negative emotions like anger and stress, an increased fatigue
- Increase in the prevalence of mental health issues
- Increased aggression, domestic violence and with mental and behavioural disorders including self-harm.

9 Impact (Contd.)



A study done on Mental health issues from rising sea level in a remote coastal region of the Solomon Islands showed that 56 of 57 participants stated that the worry about sea-level rise affected their thinking and behaviour and that of their families and communities. Similarly, a study conducted in Hefei, China indicated increased rates in admissions of schizophrenia post occurrence of floods.

Research studies from India corroborates the findings of international studies.

The Eco-psychiatry and Environmental Conservation: Study from Sundarbans Delta, India found that a total of 178 persons (male 82, female 96) attended the community mental health clinics with maximum cases being were Major Depressive Disorder (14.6%), followed by Somatoform Pain Disorder (14.0%), Post Traumatic Stress Disorder-animal attack related (9.6%) and Adjustment Disorder (9%). 11.2% cases had history of deliberate self-harm attempt, of which 55% used

pesticides. Another exploratory study on the psychiatric symptoms among people residing in flood affected areas of Kodagu district, Karnataka found the prevalence of psychiatric problems among the target group to be at 66.7% with depression (33%), anxiety (31%), somatic disorders (28.7%), sleep problems (35.7%) and substance abuse (15.8%) being the major issues.

Leaving the house during the disaster and damage to the house were found as the most important factors influencing the development of psychiatric problems among the residents of flood-affected areas of Kodagu.



9 Impact (Contd.)

Why should we take action?

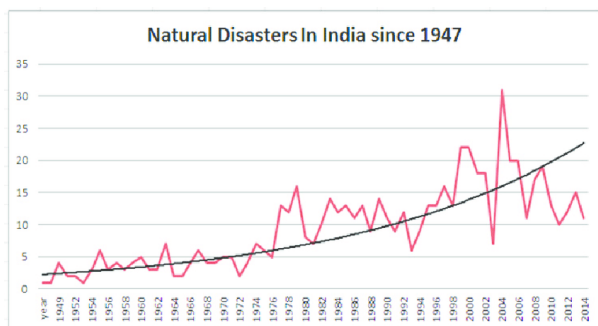
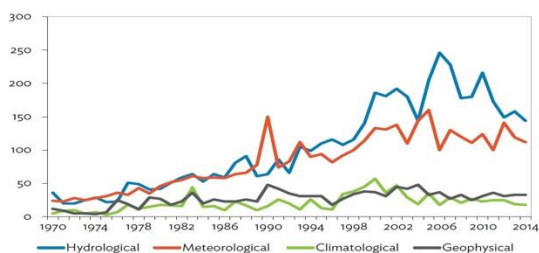


Figure 1: Global Frequency of Natural Disasters by Type (1970–2014)



Source: Authors' estimates based on data from the Emergency Events Database (EM-DAT) of the Centre for Research on the Epidemiology of Disasters. <http://www.emdat.be> (accessed 5 March 2015).

The above two figures are self-explanatory. The exponential rise in natural disasters in the last century speaks volumes and its impact on mental health is well imaginable. The natural disasters don't just affect the mental health of the lower strung of the society but affects each and every individual to varied degrees.

Mitigation strategies

India's first National Action Plan on Climate Change (NAPCC) was drafted in 2008. The proposed 'Mission on Health' aimed to address the various health-related aspects of climate change through a multi-pronged approach. In line with this mission, MoHFW constituted a National Expert Group on

Climate Change & Health (NEGCCH) to prepare action plan, recommend strategies for indicators, mitigation, capacity building etc. The current scenario demands a cross sectoral, cross ministerial and multi-pronged approach to address the increasing cases of mental health issues due to climatic changes across the cross section of the population. Some of the immediate next steps are:

1. **Developing a detailed Comprehensive Health Action Plan (HAP)** to create a structured framework that addresses the mental health impacts of climate change, outlining strategies, goals, and actions needed for effective intervention. The plan should include a **Standard Operating Procedures (SOPs)** detailing the specific roadmap. These SOPs will guide healthcare providers and policymakers in their efforts to integrate mental health considerations into climate change responses.
2. **Creating and Implementing a State Action Plan** on Climate Change and mental health to tailor responses to the unique challenges presented by climate change in different states across India, acknowledging regional variations in climate impact and health needs. The State Action Plans will assess respective state wise vulnerabilities, such as flooding in coastal areas or heat stress in arid regions and develop localized action plans that incorporate mental health strategies.

9 Impact (Contd.)

3. **Developing Training Modules for healthcare professionals** to equip healthcare professionals with the knowledge and skills necessary to recognize and address mental health issues that arise from climate change. The training modules to cover topics such as the psychological impacts of extreme weather events, strategies for community engagement, and crisis intervention techniques and delivered through workshops, webinars, online courses, or community training sessions.

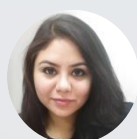
4. **Integrating Climate Change into Existing Surveillance Systems** to enhance early warning systems and health sector preparedness by incorporating climate data into health surveillance frameworks. Existing surveillance systems should be updated to include climate indicators (e.g., temperature fluctuations, extreme weather events) that can trigger alerts for potential mental health crises. For example, The National Health Service (NHS) in the UK has initiated projects to monitor the health impacts of air pollution and climate change, demonstrating the

effectiveness of integrating environmental data into health surveillance.

5. **Developing and disseminating engaging IEC materials** to raise awareness about the mental health impacts of climate change among healthcare professionals and the general public, fostering a culture of prevention and preparedness. Engaging IEC materials, such as infographics, pamphlets, social media campaigns, and community workshops, should be designed to educate diverse populations about climate-related mental health issues. It is also important to include the aspects of climate change and mental health in school curriculum to generate awareness from the very beginning.

These comprehensive actions, if effectively implemented, can successfully address the mental health challenges posed by climate change. This multifaceted approach not only supports mental health but also strengthens community preparedness and response capabilities in the face of ongoing environmental changes.

Special Contributors for the month:



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Assistant Vice President



Madhumita Sengupta
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Dr. Akshay Thakur
Manager

10

Expert speak

Biren Ghose
Managing Director
Asia Pacific & Global Excom
Member Technicolor Group



With 15 years at Technicolor in India, Biren has been a pivotal figure in scaling an empowered organisation, which has become the world's largest visual arts production hub. This prolific digital production facility produces a significant workshare across all of Technicolor's businesses. Biren's career at the Technicolor Group is marked by his ability to drive blended creative & technological innovation and talent development. He has been highly awarded by industry fora, the Indian Government and was also awarded a Chevalier status – a knighthood conferred by the President of France.

1. With the recent clearance by the Indian government for establishment of the National Centre of Excellence (NCoE) for anchoring Animation, Visual Effects, Gaming, Comics, and Extended Reality (AVGC-XR) ecosystem, what do you believe has been the most significant factor in achieving this recognition, and what's next for India in this space?

The recent establishment of the National Centre of Excellence (NCoE) for the AVGC-XR ecosystem is a significant milestone for India, driven primarily by government support and recognition of the sector's potential to foster economic growth and job creation. India's skilled workforce, blending technical and creative expertise, positions the country as a strong global competitor in animation, visual effects, gaming, comics, and extended reality. With a diverse and skilled workforce that blends technical expertise and creativity, India is

poised to enhance its competitiveness on the global stage. The Prime Minister of India sounded the clarion call, and momentum is building to take the message "Create in India" onto a global platform.

A key upcoming initiative is WAVES [The World Audio Visual Entertainment Summit] 2025, a global summit in New Delhi that will showcase India's strengths and lay the groundwork for future growth in digital media. Moving forward, collaboration between industry and academia will be crucial to drive innovation, with the NCoE acting as a hub for new IP creation and startups, helping expand India's share in global AVGC-XR services.

This development will not only create jobs but also promote the AVGC-XR sector as a career and investment opportunity, with government incentives further supporting its growth.

10 Expert speak (Contd.)

2. Technicolor has achieved tremendous success under your leadership, and the India studio has participated with its global sister studios across all your brands with multiple awards including the Oscars and Emmys. What strategies have you employed to build such cutting-edge capabilities within the team, and how do you maintain this level of excellence?

At Technicolor, our success stems from a long-term strategy centred on talent development, cutting-edge technology, and fostering a collaborative culture. Over the past 15 years, we've focused on scaling our India studio by integrating local talent with our global technology stack, making it the only location to support all our brands.

Talent acquisition and development are key to our success. We have carefully cultivated a pool of skilled artists through targeted training programs and bespoke academies, ensuring a high level of expertise across all genres. Our ability to manage different workflows across short and long-form content allows us to deliver quality consistently.

A critical factor is our investment in world-class technology. Our R&D team continually innovates, blending the best industry tools with proprietary solutions. This has enabled us to create advanced pipelines and maintain seamless collaboration across our global studios, connected via undersea cables, to work as one unified team.

By combining top talent, innovative technology, and a collaborative environment, we've delivered award-winning projects, from *The Lion King* and *The Jungle Book* to *Top Gun: Maverick* and the *Bond* movies. Our strong partnerships with leading directors and VFX supervisors, along with meticulous synchronization of efforts, allow us to consistently deliver large-scale productions on schedule and within budget. This holistic approach is what enables us to maintain excellence in a highly competitive industry.

At the Technicolor Group, we execute the big movies and episodic VFX as MPC; the prolific work across 100s of brands per year including for advertising and experiential content at The Mill; the art and animation for games at Technicolor Games and the fully animated blockbuster film and TV work as Mikros Animation.

As a talent magnet, Mikros Animation [Formerly Technicolor Animation] brought episodic and film animated work to India that was unprecedented. From Mickey Mouse to *Kung Fu Panda* to the *Penguins of Madagascar*, *Shrek*, *Teenage Mutant Ninja Turtles*, *Sponge Bob*, *Alvin & the Chipmunks* and other global titles put 100s of Indian artists and production crew's names in the credits of content seen across the world. Talent remains first and foremost, at the heart of the enterprise. From the careful acquisition of the skills with the highest potential to the process of executing our bespoke academy programmes to the upskilling of local

10 Expert speak (Contd.)

talent are all mission critical components. The management and engagement of talent within the studio according to different workflows across different genres of work – short form vs long form etc also a very special knowhow.

Next, fostering a creative environment is vital. We emphasize collaboration across departments—bringing together artists, technical directors, and producers from the outset of each project. This teamwork leads to innovative ideas and ensures that everyone is aligned with the creative vision. Open feedback channels further nurture a culture where creativity thrives.

Another important aspect is our investment in technology. We have always had the best computer graphics pipelines and tools in the industry. A large software R&D team ensures that we innovate a look and feel for each project. This is a combination of the best in class off the shelf software together with our own secret sauce through plug ins and what we build in integrating it with our own proprietary software and hardware configurations.

Our global studios are connected through a single pipe with undersea cables across the globe which makes India one with our studios in all Technicolor locations. As the largest single VFX house across film, Tv and advertising/brand experiences and game art our technologies span everything that's contemporary from advanced rendering engines to real-time visualization tools, pushing the boundaries of "what's next" in VFX.

That is what makes our work on Oscar-winning movies across Lion King and Jungle book and dozens more major Disney titles spectacular, wow audiences across the Bond movies and action titles such as Top Gun Maverick or Fast & Furious. It all comes down to the strong partnership with world's #1 clients and the most celebrated Directors, Cinematographers and VFX Supervisors in the world.

This takes a synchronisation of ideas and actions with a level of communication and sympatico that's unparalleled to make large scale productions finish on schedule and budget over a huge volume of simultaneously produced content.

It's our leadership across all disciplines and our holistic approach that enables us to maintain our level of excellence and consistency in such a competitive industry.

3. You've been a key figure in positioning the Indian AVGC industry on the global map. Looking ahead, what are the emerging trends and technologies you foresee that will shape the future of animation, VFX, and gaming globally, and how is Technicolor preparing for these shifts?

Let me answer this from how I personally see the shifting sands of technology in the creative sector in which we operate. Technology is the key enabler of the creative edge in the offerings of production studios like us. Generative AI and Cybersecurity are two facets of this "stack" sides bringing new winds

10 Expert speak (Contd.)

of change in our ecosystem. This is just a part of the sea of innovative tech canvassing the landscape and software teams in companies like ours are [as always] looking to provide thought leadership including in these areas:

A. Virtual Reality (VR) and Augmented Reality

(AR): Virtual Reality and Augmented Reality have transformed the way we experience content, and are increasingly being used in gaming, education, and marketing, offering a new level of engagement and immersion. Technicolor has for over the past 10 years produced a plethora of projects across The Mill and MPC for the largest studios and brands and though the business model has been at an early stage have accumulated considerable learnings that will inform the next generation of experiential content.

B. Motion Capture and Performance Animation:

MoCap creates highly realistic and nuanced character animations, making it a valuable tool for film, gaming, and even virtual influencers. Going back many years. MPC brought innovation to virtual production in what was executed for Disney's The Jungle Book and The Lion King. Similarly, what was done way back for Fast & Furious 7 & Bladerunner 2049 and many other projects took photogrammetry and creating digital twins to new levels of sophistication. This is now gaining momentum across image making everywhere.

C. Artificial Intelligence and Machine Learning:

AI & ML could potentially help automate the animation & VFX process, speeding up production, and reducing costs. They could also generate life-like facial expressions and movements, contributing to more convincing character performances. While Gen AI is at an early stage, AI and ML solutions have been part of the industry's stack for some years now and have many user cases. The big studios and companies like Technicolor will only bring Gen AI into the workflow once our clients and industry standards for security make it more secure. The use of Gen AI tools will probably be more of a prompt for ideation and concept iterations at this stage.

D. Real-time Animation:

Real-time animation has been a standard workflow in the gaming industry, allowing for dynamic and interactive storytelling. Technicolor Games has been a forerunner and has been involved in this for over a decade and a half working with the world's top publishers across action, sports and other genres.

E. Blockchain and NFTs in Animation:

Blockchain technology and non-fungible tokens (NFTs) are here to stay. Artists today are leveraging NFTs to sell unique digital collectibles and monetize their work. The games and esports industry will be benefitted in the way blockchain will help their scalability and traceability. It will help true

10 Expert speak (Contd.)

ownership of Game Assets. Players will be able to control their own assets and sell or trade it across different platforms. Greater security and tamper proof methods of recording in-game trails avoiding fraud and hacking. The play to earn model will become a massive trend as a result! [All these are my comments as regards what will happen in the B2C world. We as a company are mainly a B2B art provider to in this segment.

F. Experiential Tech: Tomorrow's media requires technologists and businesses to create immersive experiences for audiences. From billboards of the kind in Times Square or Piccadilly like public spaces, to domes and museums of the future like the Las Vegas Sphere, innovative experiential imagery is here to stay. Technicolor's The Mill have been prolific and industry game changers in some of the amazing projects they have delivered. From Museums of the future in Europe and China to projects in the ever-expanding Middle East, to the Sphere in Las Vegas; the big screen is no longer the theatrical experience we have seen for the past century!

4. You have also been an advocate for transformation initiatives that accelerate growth for startups and talent. Could you share insights on the new initiatives you are working on, and how they are set to raise the bar in the creative ecosystem?

Across the Technicolor Group, we are deeply committed to enriching the talent ecosystem. At the Group level, we invest heavily in talent development and enrichment, working towards lateral growth and cross skilling initiatives and so artists can have a more fungible and agile future as opportunities change with technology and the times.

The Technicolor Academy- a one of its kind initiatives in the world, works to create production-ready artists by bridging the skill gap between academia and industry. We work with verified educational institutions to leverage the legacy knowledge and learnings from the Technicolor Group as part of our Academies. In India, we have taken the in-house Technicolor Academy model and amplified it across multiple locations with a partnership model.

In my role as the Chief Mentor for STPI's Centre of Excellence at Shillong and at Imphal, one of our key priorities is to promote Indian Intellectual Property and encourage startups and fund them with seed capital provided by the Ministry of Electronics and IT via STPI Next.



Technicolor Group | MPC win Academy Award, BAFTA and VES Awards for Best VFX for The Jungle Book

10 Expert speak (Contd.)

5. Looking forward, what are your strategic priorities for Technicolor in Asia Pacific, and how do you see the company positioning itself to "move the needle" in the industry over the next few years?

Today, Technicolor Group creates and delivers cutting-edge creative solutions and world-class visual effects across our four studios, bringing immersive experiences to screens, delighting global audiences, and building our clients' businesses. We are organised around business units in film, games, animation, and beyond, connecting these through technological excellence, a passion for innovation, creativity, and artistic integrity. As we approach our 110th year our mission remains clear: to be the gold standard of visual experiences.

We have production locations for The Mill in advertising and branded solutions in Shanghai for several years and we have our studios for VFX for MPC in Adelaide that looks to film and TV/Episodic services.

With our premium offering in India for VFX, given that we have just been working in this geography for a few years, we have a slate of award-winning shows that are already under our belt paving the way for increased high-end services as the market grows to produce even more complex stories with CG as a major value addition to the storytelling. Our future as the Technicolor Group, as a renowned global leader in Animation, VFX and Games, transcends the traditional industry model, moving into immersive experiences. We aim to delight global audiences with augmented, virtual, and mixed reality experiences. We are exploring cutting-edge technology like 3D Mapping Projections, Ambient Interactivity, and AI to stay at the forefront of visual experiences. This transformation will take us from visual effects to visual experiences, driven by investment in our people, technology, and strategic partnerships.

As the APAC regions continues to accelerate its prowess across the Media and Entertainment sector, the Technicolor Group is poised to innovate, disrupt and pioneer the cutting-edge of media & entertainment.

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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.

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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