The Director's Atlas

Sector Outlook



Market size and valuation

- ~US$19-22 bn, FY2025-26E
- India-based carriers: passenger revenue
- Fuel costs constrain capacity

Primary economic engine

High-density low-cost networks, middle-class demand, regional connectivity and international route expansion.

Boardroom Focus

01 Expand widebody fleets and international capacity

02 Structure aircraft financing through GIFT City

03 Scale AI operations with safety and cost discipline

For Business, Finance and Function Directors:
A starting point for roundtable conversations on growth, resilience and stakeholder alignment.

Transformations Our Programs Deliver

OUR COACH

For Business, Finance and Function Directors

Two outcomes	Foresight to lead through disruption. Influence to align stakeholders before action. Camera confidence, eloquence, vocal gravitas and a six-week peer network.

01 ENTERPRISE RESILIENCE

Foresight → Recognised Strategic Leadership

INSIDE YOUR COMPANY

Be recognised as the director who identifies structural shifts early and turns them into a clear agenda for investment and action.

OUTSIDE YOUR COMPANY

Build a reputation for judgement that clients seek by name, partners trust and competitors benchmark against.

02 STAKEHOLDER ALIGNMENT

Functional Authority → Enterprise-wide Influence

INSIDE YOUR COMPANY

Build a function backed by peers and the C-suite. Articulate ideas with clarity, eloquence and vocal gravitas, with confidence in the room and on camera.

OUTSIDE YOUR COMPANY

Be known for ethical influence and strategic judgement, supported by a trusted peer network built over six weeks.

Five paradigm shifts

What changes the basis of competition

01 Structural

Consolidation → stronger duopoly and GIFT City aircraft leasing.

02 Technology

Legacy systems → cloud reservations, digital retailing and AI operations.

03 Evidence and trust

Operator assurances → safety audits, fatigue and on-time data.

04 Economics

Volume growth → fuel, currency and ancillary-revenue discipline.

05 Socio-cultural

First-time flyers → stronger expectations for service and refunds.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Which of these shifts could change your competitive position - and which is missing from your leadership agenda?

Opportunity & Disruption

Where value can move in airlines

01 Market opportunity

International routes, GIFT City aircraft financing, regional-language booking and maintenance hubs.

02 Disruption

Jet fuel volatility, engine delays, rupee depreciation and airport congestion.

03 Sector impact

Grounded aircraft and higher fuel, lease and maintenance costs constrain capacity and margins.

04 Strategic response

Build domestic maintenance capacity, assess hub-bypass routes and strengthen fuel and currency hedging.

Opportunity → Disruption → Impact → Strategic Response

Sector Movement

Signals to fund, reshape or leave behind

EVOLVE

Reshape existing lines

Low-cost carriers, GIFT City leasing, regional airports and third-party maintenance providers.

SURGE

Scale emerging lines

Aircraft leasing funds, predictive flight operations, long-range narrowbodies and voice-AI booking.

SHRINK

Reduce exposure

High-cost regional carriers, manual maintenance shops and unhedged currency exposure.

SUNSET

Exit structurally weak models

Paper ticketing, unhedged feeder models and offshore-only lease broking.

FOR YOUR NEXT LEADERSHIP DISCUSSION

What should your business fund, reshape or stop - and where does the leadership team disagree?

Governance Agenda

Regulatory and board priorities

01 Regulatory drivers

- DGCA flight duty time limits and aviation safety oversight
- Aircraft Objects Act, IFSCA leasing and aviation law
- DPDP requirements for passenger data and digital systems

02 Board oversight priorities

- Scale international capacity with safety and crew readiness
- Secure GIFT City financing and manage fuel and currency risk
- Build engine-availability and maintenance contingencies

Director's Future Role

Strategy, finance and operations

Strategy

Model international routes, fleet choices, fuel and currency scenarios.

Transformation

Apply AI to crew rostering, disruption recovery and maintenance planning.

Finance

Structure GIFT City leases and manage fuel, currency and fleet funding.

Risk & Compliance

Assure crew-rest compliance, safety controls and engine contingencies.

Operations

Improve aircraft turnaround, maintenance logistics and fuel efficiency.

Supply Chain

Secure aircraft deliveries, spare engines, maintenance capacity and fuel.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Are strategy, finance and operations working from the same assumptions about growth, investment and risk?

Director's Future Role

Commercial, customer and product

Quality & Excellence

Improve on-time performance, maintenance reliability and safety assurance.

Business Development

Develop international routes, ancillary revenue and regional cargo opportunities.

Sales

Grow corporate contracts, agency sales, cargo and loyalty partnerships.

Marketing

Market international value and regional-language digital journeys.

Client Experience

Provide regional-language booking, proactive delay updates and recovery support.

Product & Technology

Build predictive operations, booking tools, ancillary bundles and rebooking journeys.

Director's Future Role

Data, people and governance

Data & Analytics

Model yields, maintenance needs, crew constraints and fuel-currency scenarios.

Information Security

Secure reservations, crew systems, airport links and passenger data.

People & Culture

Expand pilot and cabin-crew pipelines and equip ground teams for AI tools.

Learning & Development

Scale crew and engineer training, fatigue awareness and AI-operations skills.

Legal

Negotiate aircraft leases, secure route rights and protect technology assets.

ESG & Sustainability

Oversee emissions, cabin safety and environmental standards in maintenance.

Turn Sector Intelligence into Enterprise Action

For Business, Finance and Function Directors

Which business priority needs clearer direction or stronger support?

EXPLORE ROUNDTABLE THEMES

01 Enterprise Resilience

Turn disruption into growth with a financially grounded resilience roadmap.

02 Enterprise Transformation

Convert strategy into execution, ownership and measurable change.

03 Stakeholder Alignment

Move from functional authority to enterprise-wide influence.

Let others see the capability those closest to you already recognise.

Grow in confidence, express yourself with eloquence, and become more recognised for the value you bring.

REQUEST AN INVITATION

Discuss your priority on WhatsApp

Bring one live business challenge. Let’s explore which roundtable is relevant to your priorities.

jatin@ourcoach.in

+91 99993 45967