

No intelligence without the data

Building the trusted connectivity foundation for India's AI-enabled aviation ecosystem

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OAG

The travel industry doesn't just need more data It needs better answers

- **India is building one of the world's most ambitious aviation ecosystems** and preparing to power it with artificial intelligence - but AI does not create trust - it inherits it
- Every predictive model, every intelligent airport, every national **data platform is only as reliable as the data beneath it**
- The first question in India's AI journey is not which model to build. It is **which data to trust**

India's aviation moment

The scale is real, and so is the momentum

India is now the world's third-largest domestic aviation market. This is the growth trusted data has to keep pace with.

3rd

largest domestic
aviation market in the
world

174m

passengers carried in
2024, projected to reach
425m by 2044

2x

domestic capacity in a
decade: 7.9m to 15.5m
seats (April 2014 to
2024)

6.9%

annual capacity growth,
the fastest among the
world's top five markets

The workshop's ambition

From digitalisation to digital intelligence

Each shift the workshop envisions is a step up in what the data has to carry

The common denominator

- None of these shifts is a modelling problem first
- Each one depends on data that is comprehensive, accurate, timely and standardised enough to be trusted at national scale

Data collection



Actionable intelligence

Manual oversight



Risk-based surveillance

Historical reporting



Real-time monitoring

Stand-alone systems



A connected ecosystem

Why the foundation matters

AI is only as good as the data beneath it

Trained on fragmented or inconsistent data, AI does not fail loudly. It produces confident, well-presented answers that are quietly wrong, the hardest kind of error to catch at national scale

01

Fragmentation

When schedules, capacity and demand live in separate, inconsistent systems, no model sees the whole picture, and no two answers reconcile

02

False confidence

AI presents every output as authoritative. Without a trusted source of truth, plausible and correct become impossible to tell apart

03

Compounding error

Flawed inputs propagate through forecasting, surveillance and planning. A national platform inherits the quality of its weakest feed

Trusted by design

What trusted data actually means

Comprehensive

Global coverage of every scheduled flight, not a partial or regional view

Accurate

Validated and quality-controlled, so decisions rest on fact, not approximation

Timely

Current enough for real-time monitoring and forward planning alike

Standardised

One consistent structure every system and model can read the same way

And one more thing: neutrality. A trusted layer has to be independent of any single airline or airport. Neutral ground is what lets competitors, regulators and platforms all rely on the same numbers

Where aviation data fits



The neutral foundation India can build on

Independent of any airline, GDS or booking platform: **one reference layer India's carriers, airports and policymakers can all trust**

The signals it brings, across the journey

Demand

Where passengers want to travel
(MIDT + market estimates)

Schedules

Every scheduled flight, worldwide

Connectivity

How airports and networks link the world

Fares & pricing

Competitive fare intelligence

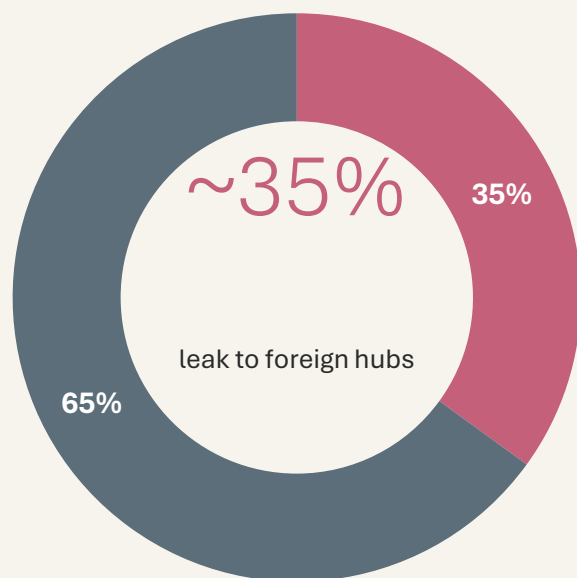
Flight status

Real-time operational signals

The evidence base India can build on: network planning, route cases, fare benchmarking and connectivity gaps.

Use case 1 of 3 · Connectivity intelligence

Benchmarking India as a global hub



■ Connect via foreign hubs ■ Retained within India

Around 35% of international passengers departing India connect through foreign hubs such as Dubai, London, Hong Kong and Singapore. India's government calls this a structural leakage it wants to reverse and is backing new mega-hubs to do it

- **Quantify the gap** Measure where India's connecting traffic actually goes today, hub by hub and route by route
- **Benchmark the rivals** Track how Dubai, Doha and Singapore build connectivity, and where India can win it back
- **Target the build-out** Turn that evidence into a case for where new hub capacity delivers the greatest return

Use case 2 of 3 · Demand intelligence

Evidence-based route development

India's airport network has grown from 74 to 163 airports in a decade, with a national ambition of 350 to 400 by 2047
The question is no longer where can we fly, but **where is the unserved demand**

01

See true demand

MIDT and demand data reveal where passengers actually want to travel, including journeys that connect elsewhere today because no direct service exists

02

De-risk new routes

Replace guesswork with evidence on likely traffic, so carriers and regions commit capacity with confidence, not hope

03

Direct regional policy

Give UDAN and state authorities an objective basis for where public support unlocks genuinely viable connectivity

Use case 3 of 3 · Trusted data exchange

A trusted layer for the National Aviation Data Platform

A national platform is only as credible as the sources feeding it. Authoritative, neutral connectivity intelligence can be one of those trusted layers, a shared reference every stakeholder can rely on

A single reference point

Regulators, airports and airlines working from the same authoritative view of global schedules and capacity, rather than reconciling conflicting feeds

Neutral by structure

Because data companies sit outside any airline or airport, its data can be shared across competitors without tilting the playing field

Built for exchange

Standardised, machine-readable data designed to integrate cleanly into secure national infrastructure and AI pipelines

India's Hub Opportunity

What the data tells us

Can India build globally competitive aviation hubs?

Dubai, Singapore and Hong Kong have built the world's dominant connecting hubs - generating economic value, anchor airline brands and airport cities

India's major gateways are growing fast. But **size and growth are not the same as hub competitiveness**

Market intelligence data gives us a precise picture of where India stands today - and where the realistic opportunity lies

Finding 1 | India lags in international connectivity



176

international routes at Delhi

+71 since 2010 - growth from a low base

137

international routes at Mumbai

+51 since 2010 -- competitor hubs slowing from market maturity

2x+

more overseas airlines at HKG and SIN

Foreign carriers at Indian gateways operate once daily; HKG twice, SIN three times

Finding 2 | Domestic capacity dominates both gateways

Delhi (DEL)

- 75% of all flights are domestic
- Connectivity to 90 domestic markets
- Half of all domestic capacity is concentrated in the top 10 routes
- BOM-DEL alone accounts for 18% of domestic flights - 60 scheduled departures a day
- New metro airports will partially redistribute capacity over time

Mumbai (BOM)

- 75% of all flights are domestic
- Connectivity to 74 domestic markets
- 62% of domestic capacity concentrated in the top 10 routes
- Historically constrained slots have been a structural barrier to international growth
- Navi Mumbai airport changes the calculus from the early 2030s onwards

Finding 3 | India's hubs function as regional, not global, connectors



Delhi

84%

of Europe traffic is destined for India - not onward international connections

75%

of Europe-Rest of World connecting traffic stays within South Asia

4x

more Europe-South Asia passengers travel via Dubai than via Delhi

Mumbai

93%

of European traffic is destined for India

<40

passengers/day connect Europe-SE Asia via Mumbai vs 8,600+ via Dubai

2%

shorter London-Singapore via Mumbai - passengers still choose Dubai

Finding 4 | The economics do not favour hub competition

India's structural reality

- **One of the world's fastest-growing domestic markets:** aircraft fill on local demand alone
- **Load factors on domestic and international routes are high** without connecting traffic
- **Connecting traffic** is lower-yielding and operationally complex
- Air India data shows Delhi **is uncompetitive on key sixth-freedom flows** such as London-Melbourne
- **Gulf and Asian hub carriers outcompete on price and schedule depth** on every major connecting route

The Gulf model - not replicable

- Dubai: approximately 50% of all traffic is connecting. Doha: approximately 90%. These hubs exist to serve transit, not local demand
- Gulf carriers were built around the hub model from inception; it is their core revenue base, not an add-on
- State capital and sovereign network strategy underpin their connectivity subsidy
- India's airlines operate in a competitive commercial environment - the model cannot be copied

The intelligence case

India's uncontestable position is not international-to-international hub traffic. It is domestic-to-international connectivity.

- Aggregating one of the world's fastest-growing domestic markets and feeding it efficiently to the rest of the world is a position no other country can replicate
- Delhi and Mumbai do not need to replicate Dubai. They need to own the gateway to India

01

Grow foreign carrier frequency

- Indian gateways have too few overseas airlines operating too infrequently
- The regulatory priority should be active attraction of new foreign entrants and incentivising twice-daily or three-times-daily operations - mirroring HKG and SIN benchmarks

02

Turn domestic feed into a product

- India's domestic network is its competitive moat
- Work with airlines and airports to make domestic-to-international connections seamless:
 - coordinated scheduling
 - through-check-in
 - minimum connect times
 - tariff transparency for sixth-freedom itineraries

03

Ground policy in data, not aspiration

- OAG data shows precisely where the gaps are in frequency, in carrier diversity, in connection quality
- Evidence-based slot allocation and targeted bilateral negotiations deliver better outcomes than hub aspiration framed around international-to-international traffic

How OAG can contribute

Supporting the workshop's outcomes

The data foundation maps directly onto the deliverables this workshop set out to create

AI use case catalogue

Contribute proven connectivity and demand use cases, grounded in real deployments across global aviation

Trusted AI governance

Share what data quality, neutrality and provenance look like in practice as principles for trusted AI

Industry action plan

Help define the authoritative data layer the roadmap needs, and how India accesses it at national scale



There is no intelligent aviation ecosystem without a trusted data foundation

OAG is the essential intelligence partner transforming global travel