

IATA
WORLD
PASSENGER
SYMPOSIUM

Track sponsored by:



Modern Airline Retailing

Yanik Hoyles
Director Distribution
IATA

#IATAWPS #IATAWFSWPS



A cohesive initiative to unleash **value creation**
and **customer centricity** through

a world of **Offers & Orders**
supported by **Digital Identity**



Modern Airline Retailing

Airlines in control of their products, money & data

Digital Identity

Customer Identity in Retailing

Customer Identity in Service
Delivery

Digital Identity of Value Chain
Partners

Selling with Offers

Product and Partnership
Management

Offer and Channel Management

Payment Management

Fulfilling with Orders

Order Management

Order Accounting &
Financial Management

Delivery using Orders

Standards Development

Transition / Acceleration

Communication & Engagement

Announcements we heard in 2023 ...

Amadeus CEO Eyes 2024 For NDC Booking Critical Mass

Amon Cohen May 9, 2023

[DISTRIBUTION](#) • [SERVICE](#) • [SUPPLIERS](#)

American Express Global Business Travel Sets Minimum NDC Requirements

Jay Campbell • February 15, 2023

Singapore Airlines Expands NDC Content Differentiation

Jay Boehmer June 14, 2023

AA: 80 Percent Of Bookings Could Come Direct Or Via NDC By Year-End

Jay Boehmer April 27, 2023

Global Air Tech



18 July 2023

Global Air Tech: A primer on Global Distribution Systems - the crumbling oligopoly



Alex Irving, CFA
+44 207 170 0539
alexander.irving@bernstein.com

Global Distribution Systems (GDSs) are pivotal pieces of the travel ecosystem, but infrequently well-understood. Historically a three-player oligopoly of two-sided networks, this once-comfortable industry is undergoing rapid change. The airlines that supply the bulk of revenue are increasingly taking back control of their distribution, and the agents on the

SAS unveils NDC strategy with Amadeus partnership

23 March 2023

AVIATION

Air Canada lays out NDC strategy, including a surcharge on legacy GDS bookings

By Jamie Blesiada | Apr 19, 2023

1 A+ A-

NDC Volume Crosses 10 Percent Threshold At ARC

Jay Boehmer August 29, 2023

Nearly 13 percent of airline transactions recorded through ARC in July were handled through ARC Direct Connect, the settlement and reporting company's program for New Distribution Capability and other API-based sales, according to ARC. ARC's NDC mix has grown this year, as airline participants expand adoption through various commercial levers and as new carriers join the reporting and settlement system.

Today In Distribution Cost Shifting: Latam To Turn On GDS Surcharge

Jay Boehmer April 28, 2023

Air France-KLM Hikes GDS Surcharge For Second Time This Year

Jay Boehmer June 21, 2023

Air France-KLM for the second time this year is increasing its surcharge on global distribution system bookings, this time to €21 per way.

CWT, Spotnana Announce 'Strategic Partnership'

Jay Boehmer June 22, 2023

CWT on Thursday announced a "strategic partnership" with Spotnana through which the mega travel management company will go to market with "a new technology-led global travel solution for customers built on top of Spotnana's modern infrastructure."

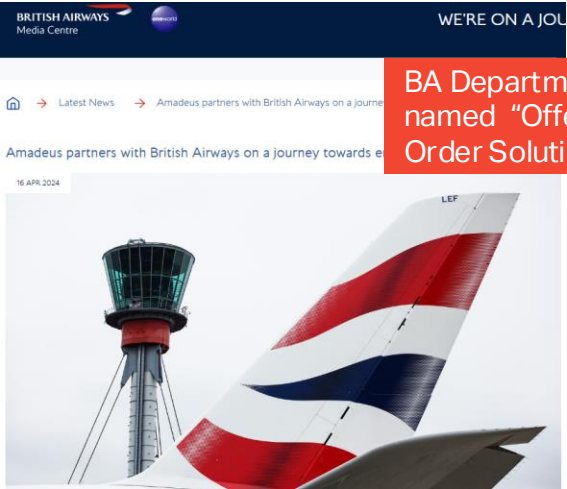
TMC & DISTRIBUTION

Amex GBT to offer Air France-KLM's NDC content

By Michael B. Baker / 26 April 2023 / Contact Reporter

1 A+ A-

In 2024, the dial has moved quite significantly



BA Department re-named "Offer & Order Solutions"



AF/KL "MOON" Program



DIGITALIZATION

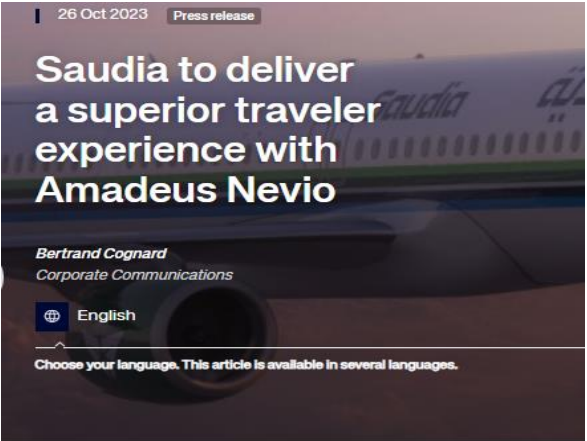
Easy Check-in and Self-Service Channels

- Possibility to conduct all transactions through online channels

Dedicated team set up in Turkish Airlines

Full Retailing Platform

- Simplified ticketing from a single channel



The national flag carrier of Saudi Arabia and Amadeus announce partnership on Saudia's transition to an entirely new generation of simplified and end-to-end retailing technology.



LHG "CORE" Program

Digital Transformation

- An integrated customer experience across all channels
- Seamless internet access at airports, lounges and on board
- Customized products and services across all channels

600 MILLION USD (5 Years)

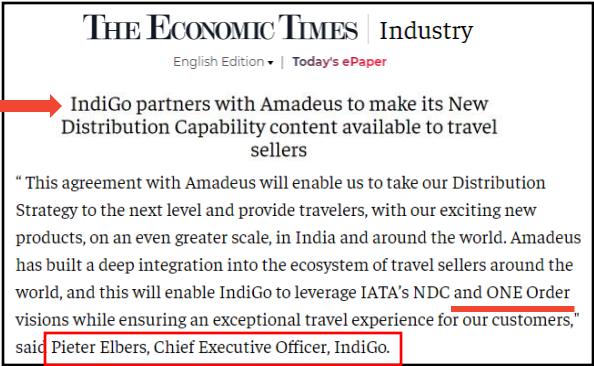
BERNSTEIN
SOCIETE GENERALE GROUP

11 October 2024

Global Air Tech

Global Air Tech: Battle lines drawn for order management (Q3 preview)

Order management systems: first the trickle, then the flood? NDC has dominated air tech discussions for years and will likely continue to do so. However, investors should pay increasing attention to Order Management Systems. The modernization of IT and eventual replacement of the Passenger Service System may bring major benefits to airlines



To fulfil its **full potential**, our industry needs to phase out **legacy**, revamp its **standards**, invest in **new technology** and consider a **modular architecture**.

And this **journey has begun**, with good progress.

Tangible momentum on all fronts

The **IT Provider Readiness** status for a world of 100% Offers & Orders **shows progress**

The PSC is making the **MAR standards a priority** and a **Roadmap** is ready

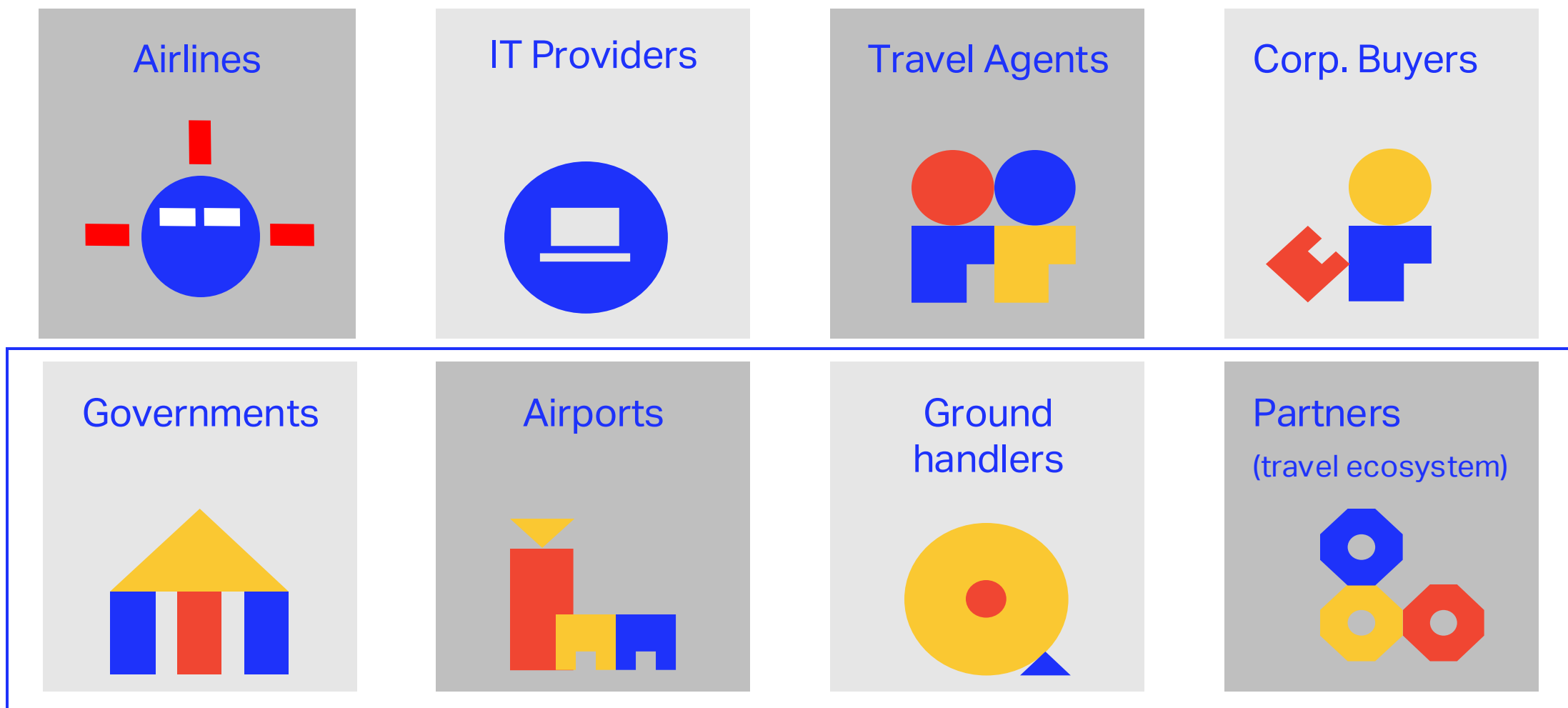
Digital Identity is part of the framework and is becoming **more tangible**

Airlines are **starting the Orders** phase, and a first industry **Transition Roadmap** is ready

Equipping **our talent** with the **knowledge & mindsets** supporting the transition is also on the radar!



And alignment and collaboration remain critical



as the scope expands...

High Level Industry Roadmap with Offers & Orders

**Industry
Standards**

**Airline
readiness**



**IT Vendor
readiness**

**Other
stakeholders
readiness**

Disclaimer : Roadmap based on current knowledge, with added projections and high-level dependencies. It will evolve. Timelines may vary by airline size, business models, and regional factors.

* Core Standards: NDC , ONE Order for Accounting and Delivery , SRSIA framework for Interlining with Offers & Orders

** Core solutions: Offers & Orders including accounting and legacy system translators



Thought leadership, by the industry, for all

A Business Case v.1.0

Business Reference Architecture

IT Transition & Pathways

Procurement Considerations

Business Case & Decision Drivers

IT Provider Readiness & Roadmap

Delivering with Orders and Digital ID



» iata.org/retailing-consortium

IATA
WORLD
PASSENGER
SYMPOSIUM

Track sponsored by:



Thank you!



#IATAWPS #IATAWFSWPS

