

Airline Systems Modularity in Action with Offers & Orders

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**Modularity in action –
Demos by multiple IT providers**

1

Multivendor O&O Modularity Demos and O&O Demo Days

1-2 October 2025, IATA Geneva



More information at <https://bit.ly/MAR-IT-Providers>

**Annual study of IT Providers and
Consortium airlines**

2

October 2025

Modern Airline Retailing

Readiness and Roadmap to 100% Offers & Orders

Through the lens of IT providers & Consortium airlines



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Download at <https://bit.ly/MAR-IT-readiness-2025>



Multivendor O&O **modularity in action**

1

Goal

Demonstrate modularity
& interoperability
in action

8

Team Demos

20+

Companies

5

Business Domains*

as per Business Reference
Architecture (RP 1786a)

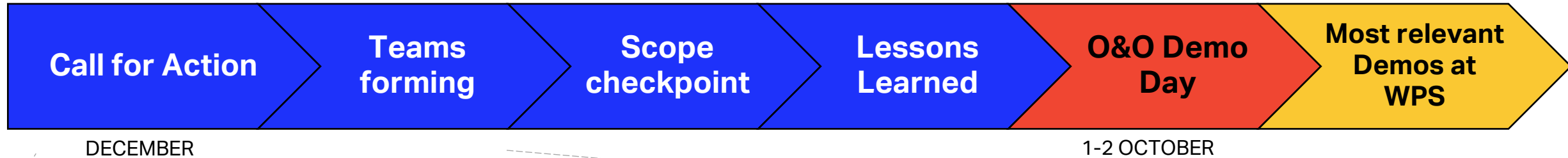
15

Offers & Orders IT Providers

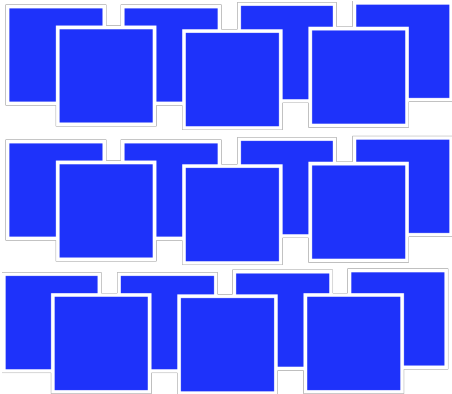
* Product <> Offer <> Order <> Finance **and/or** Delivery



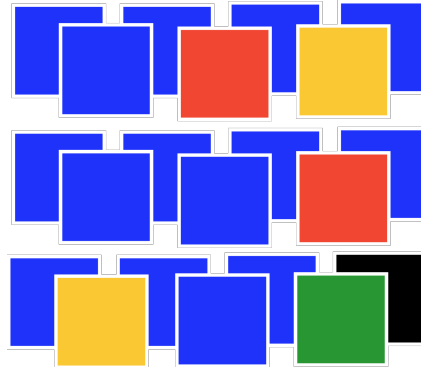
New partnerships formed & teams worked hard



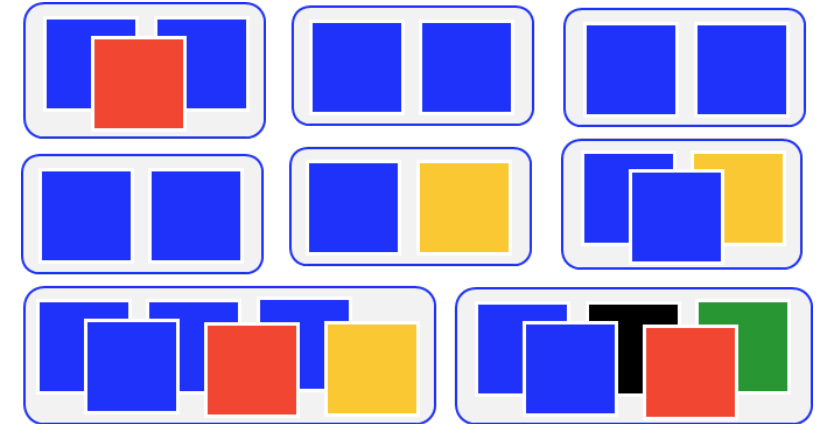
Call for action



Large majority (70%) joined & mobilized others



Eight (8) teams formed



One team must have minimum two IT Providers

Some companies joined 2-3 teams



Eight team demos by 21 companies showcased modularity



Lufthansa Systems

Res2



AIRNGURU

piano

Sabre



Lufthansa Systems



HYATT®



ink



accelya



atpco



FLYR



ink

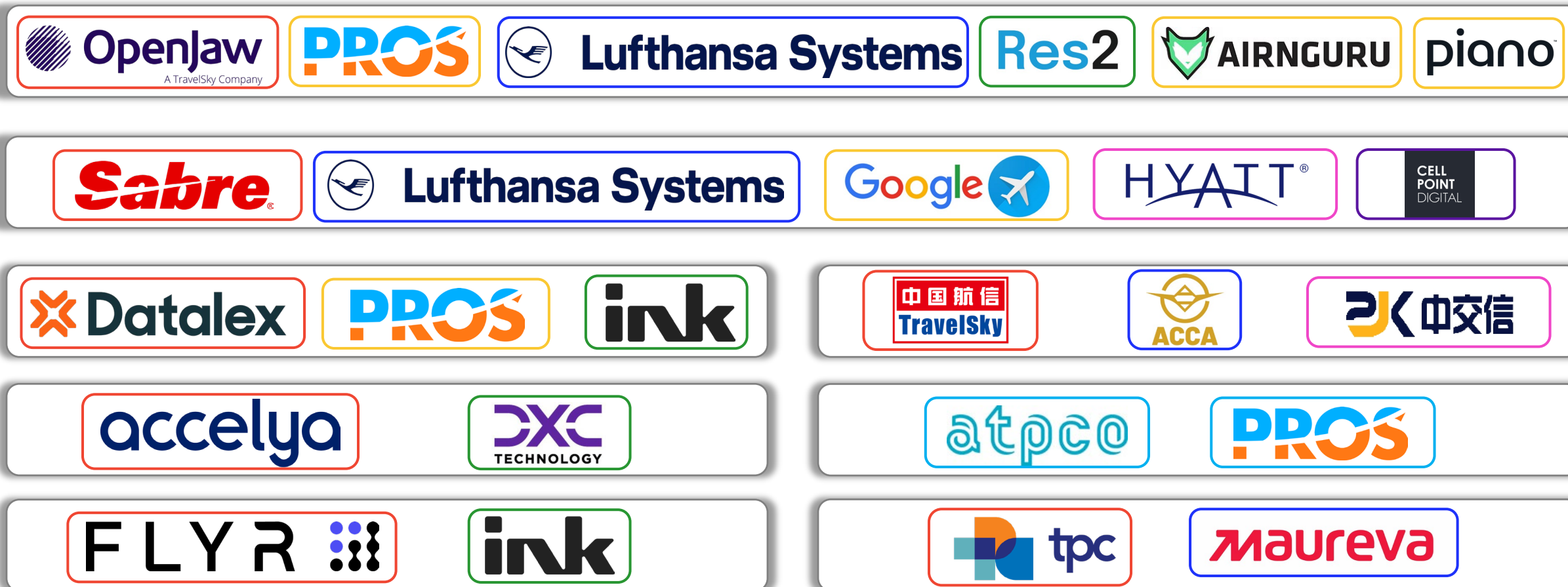


maureva

Use QR code or go to <https://bit.ly/MAR-IT-Providers> for more information.



Demo Day result: IT providers **prove modularity** and make O&O more **tangible**



ORDER, OFFER AND/OR PRODUCT*

OFFER *

FINANCE *

DELIVERY *

PRODUCT*

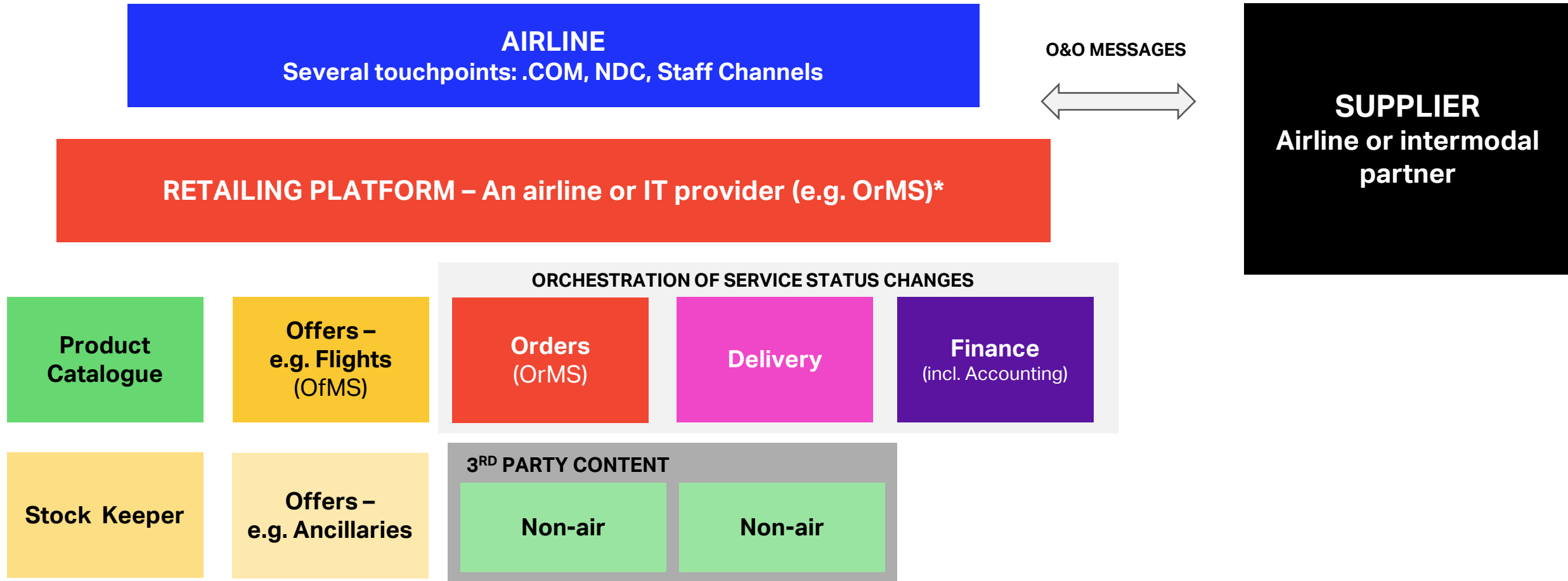
INTERMODAL & NON-AIR*

PAYMENT*



* IT provider's role in the demo. IT Providers may be active in more domains than shown here.

Modularity shown on domain & subdomain levels



Each box represents a potentially different IT Provider

* Two approaches to orchestration & integration: airline vs IT provider as a central point/platform

A simplified summary of modularity and use-cases shown in most of the demos

Most relevant demos voted for replay



Demo replay at 14:25 (Plenary)



Demo replay at 9:15 (Track 1)



Demo replay at 12:15 (Track 3)



Use QR code or go to <https://bit.ly/MAR-IT-Providers> for more information.



1

"The O&O Demo Day marks an **industry milestone**. Eight demos in a single day—something we don't see on 3-day conference."

- *Turkish Airlines*

Multivendor O&O Modularity Demos and O&O Demo Days

1-2 October 2025, IATA Geneva

"It's remarkable to see the industry advancing in such a tangible way. **This is exactly what we need** to showcase **modularity & collaboration**."

- *Iberia*

"It was an **exciting day** filled with **energy & passion**. Truly inspiring."

- *American Airlines*



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2

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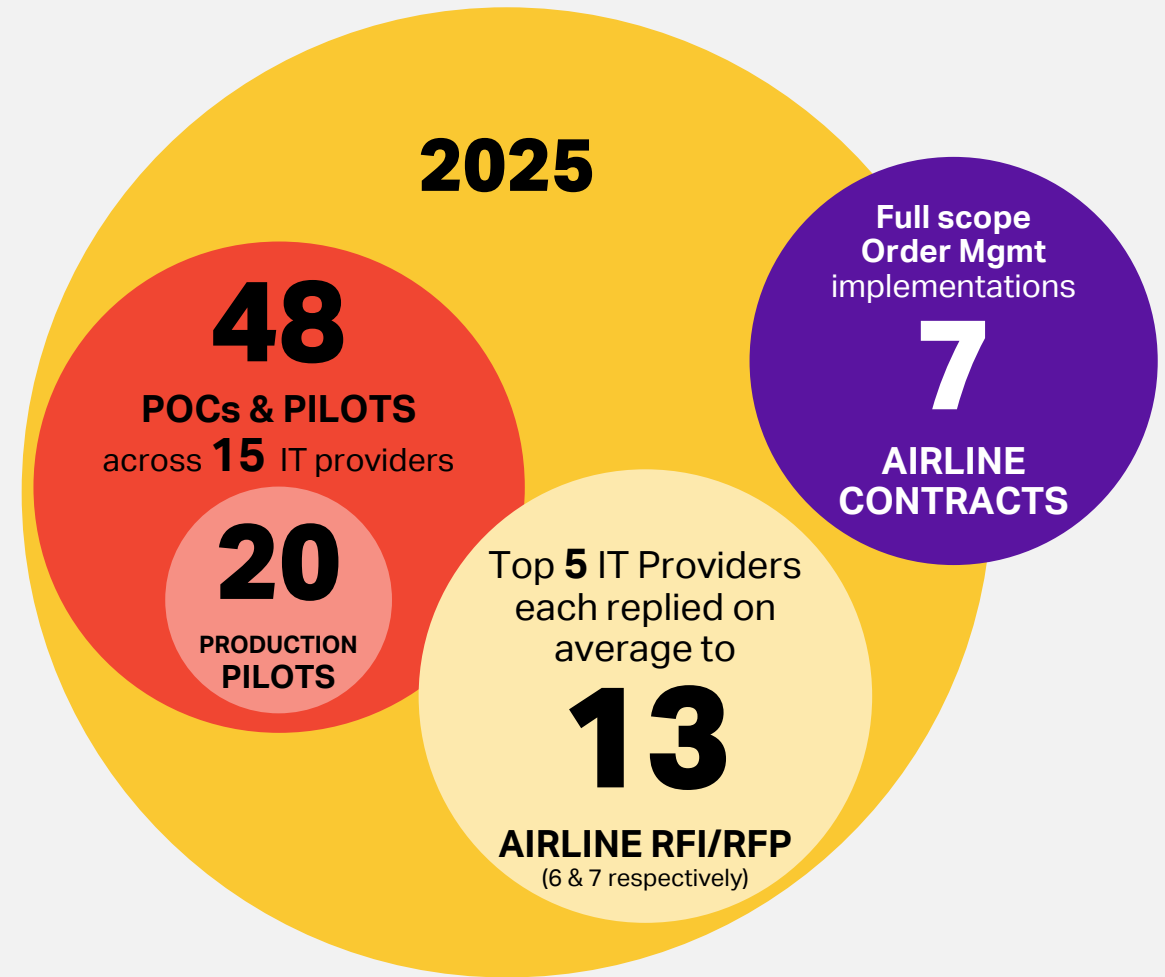
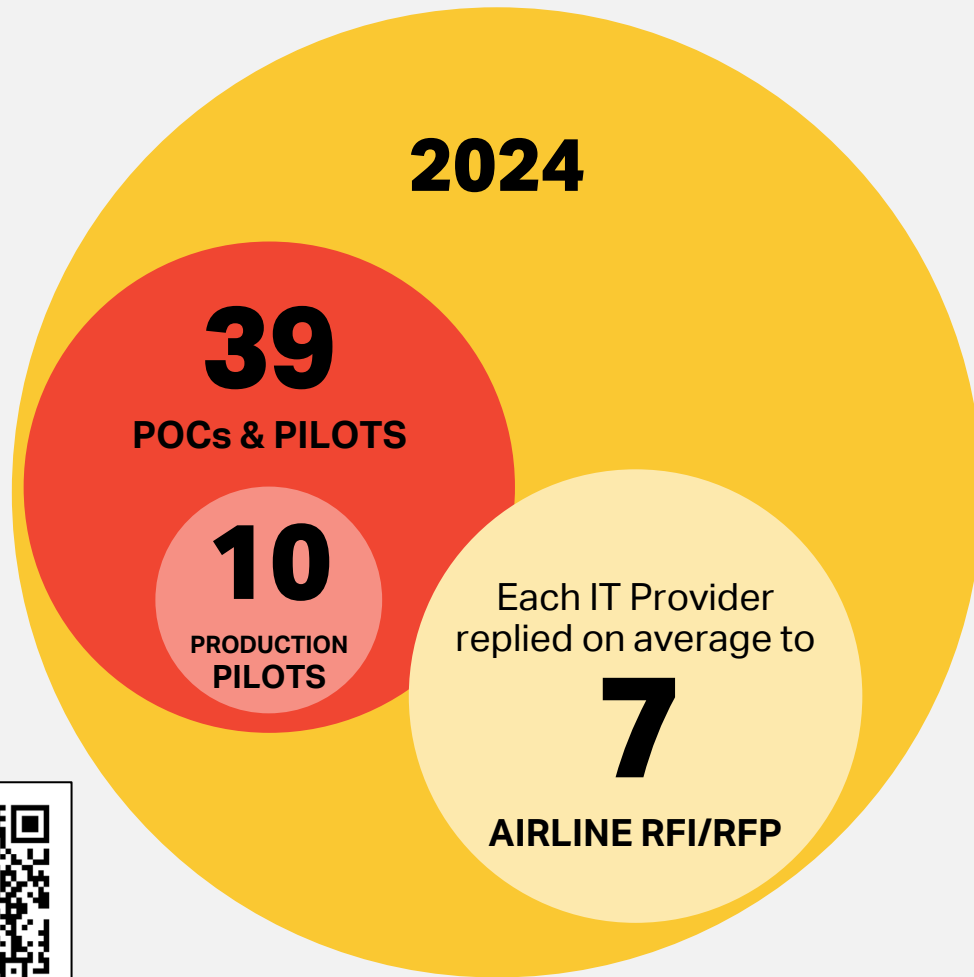
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2025 surveys confirm **momentum is building**



Source: IATA 2025 Surveys covering **20** IT providers (~**64%** of PSS market share) and **14** Consortium "first-mover" airlines (~**25%** of global traffic). Answers are self reported.

Reporting periods: Jan 2023-May 2024 and Jan 2024-May 2025. A POC/Pilot represents an Airline-IT Provider pair engaged in a POC/Pilot – one IT Provider often runs several POCs, and one airline could be part of several POCs. POCs/Pilots in progress or completed.



IT providers invest **>\$1billion** and Consortium
Airlines invest **100s of millions**

In total,
IT providers invest
over*

\$1 Billion

Some Consortium
airlines invest
on average approx.

\$115 Million
per airline/airline group



* Including total multi-year investment reported by IT providers in 2024 & 2025 surveys. However, it is underestimated, as many IT providers have not disclosed their investments to IATA.

Source: IATA 2025 Surveys covering **20** IT providers (~**64%** of PSS market share) and **14** Consortium "first-mover" airlines (~**25%** of global traffic).



2025 surveys **confirm Roadmap** to O&O

7 O&O airline contracts signed

First use cases with Orders

Leaders live with Orders

2

Majority of Consortium Airlines piloting & under RFI/RFP

2. Airline
readiness

Set-up and Pilots

Leading Airlines Live with
Orders ***
First Digital Payment
strategies

Leaders mainstream

Industrialization

2024-25

2026-27

2028-29

>2030

3. IT Vendor
readiness

Testing

Core Solutions** Ready

Industrialization with enhanced modules
(i.e Delivery, Interline, Disruption , etc...)

1

Systems built & live implementations

Beginning of legacy decommissioning

| ← First runners (25%)

Majority (75%) → |

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

*** Order as master record



IT providers build & go-live in 2025-2028

for the first airlines

	First Runner IT providers (25%)*		Majority of IT providers (75%)*				<div> <div>✓</div> <div>✓</div> <div>BUILT</div> </div> <div> <div>✓</div> <div>✓</div> <div>LIVE</div> </div>
	2025	2026	2027	2028	2029	2030	
Product Catalogue as master (without filed fares)	✓	✓	✓				
Offer: Bundling (without filed fares)	✓	✓	✓				
Offer: Continuous Pricing (price point not from filed fare level)	✓	✓	✓				
Offer: Stock Keeper (without legacy inventory)	✓	✓	✓				
Order as master for selling (PNR & ticket secondary/not used)	✓	✓	✓	✓			
Order as master for Accounting (no ticket nor EMD)	✓	✓	✓				
Order as master for Delivery	✓	✓		✓	✓		
O&O-based Partnerships (incl. interline)	✓	✓		✓			

Source: IATA 2025 Surveys covering 20 IT providers (~64% of PSS market share).

Demo rollouts confirm IT provider momentum

ACTIVE DOMAIN = 2026 TARGET*

✓ = DEMO AVAILABLE
NO BOX = ANSWER NOT DISCLOSED

IT Provider		Product Mgmt	Offer Mgmt	Order Mgmt	Financial Mgmt (~Order Accounting)	Delivery Mgmt (~Future of DCS)
5 IT Providers	Accelya	✓	✓	✓	✓	
	Amadeus	✓	✓	✓		
	Hitit	✓	✓	✓		
	IBS Software	✓	✓	✓		
	Sabre	✓	✓	✓		✓
6 IT Providers	Datalex	✓	✓	✓		
	FLYR	✓	✓	✓		
	Navitaire	✓	✓	✓		
	OpenJaw		✓	✓		
	PROS	✓	✓			
	TPConnects	✓	✓	✓		
9 IT Providers	ATPCo	✓				
	Unisys					
	ACCA				✓	
	Lufthansa Systems				✓	
	Maureva				✓	
	SAP				✓	
	Sutherland				✓	
	INK					✓
	Res2					✓

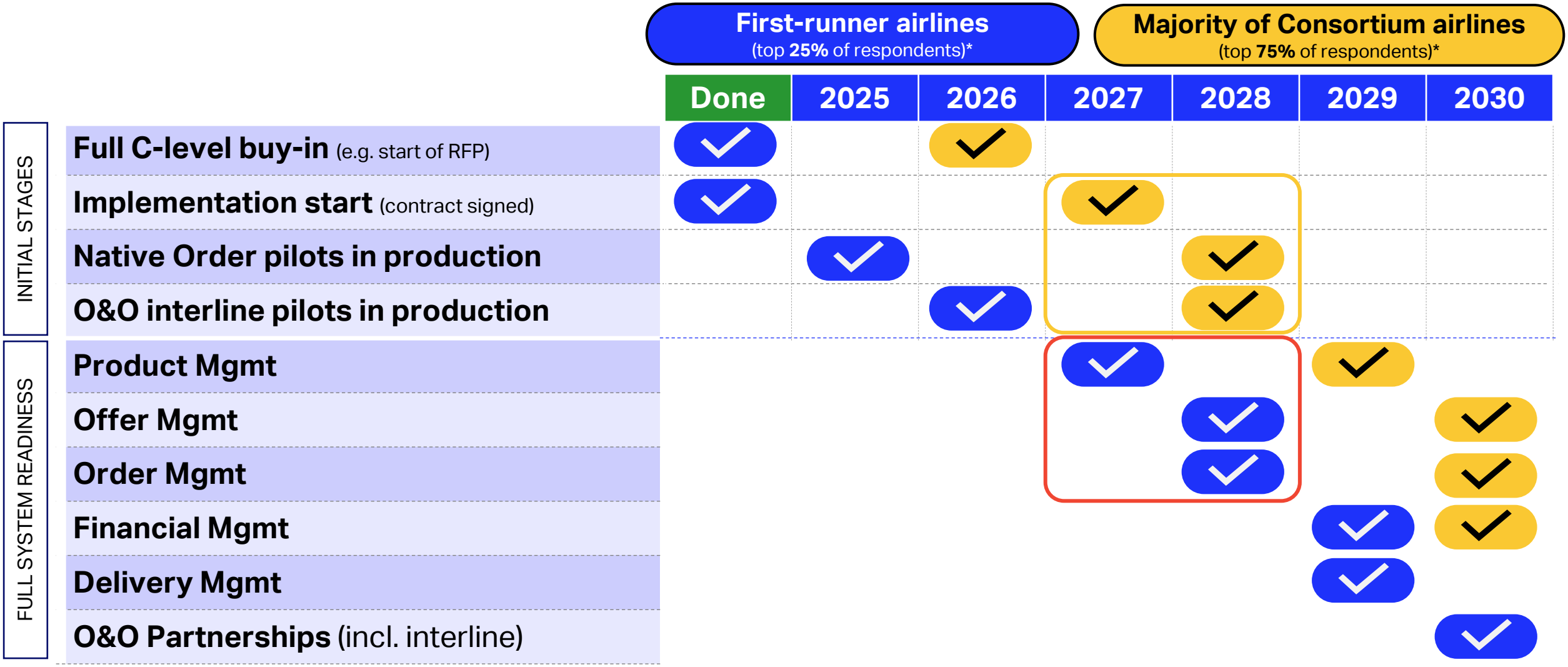
*Expected domains in 2026 with at least partial (>30%-50%) core capability support.

Source: IATA 2025 Surveys covering 20 IT providers (~64% of PSS market share), October 2025.
Answers are self reported.

NB: This is a non-exhaustive list of IT Providers.
All IT Providers from the 2025 survey included.

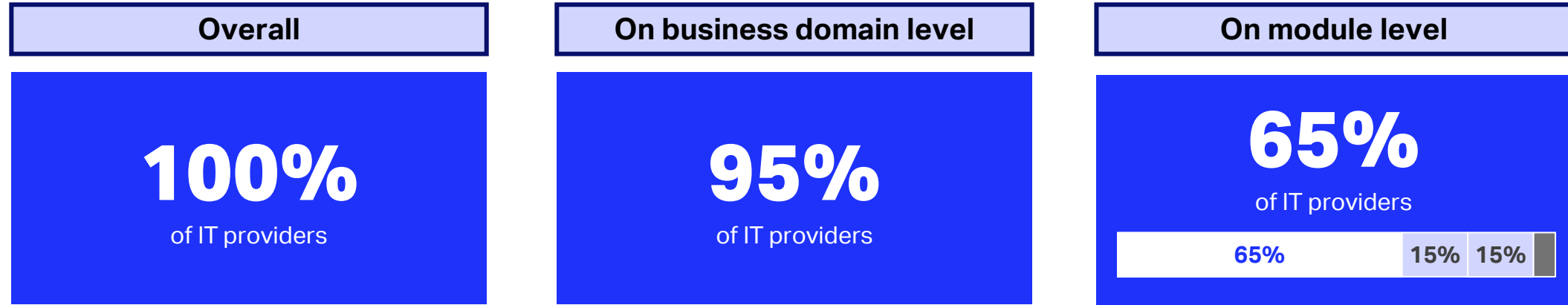


Leader airlines timeline: **fully ready to launch** Offers & Orders **in 2027-28**, all domains by 2030

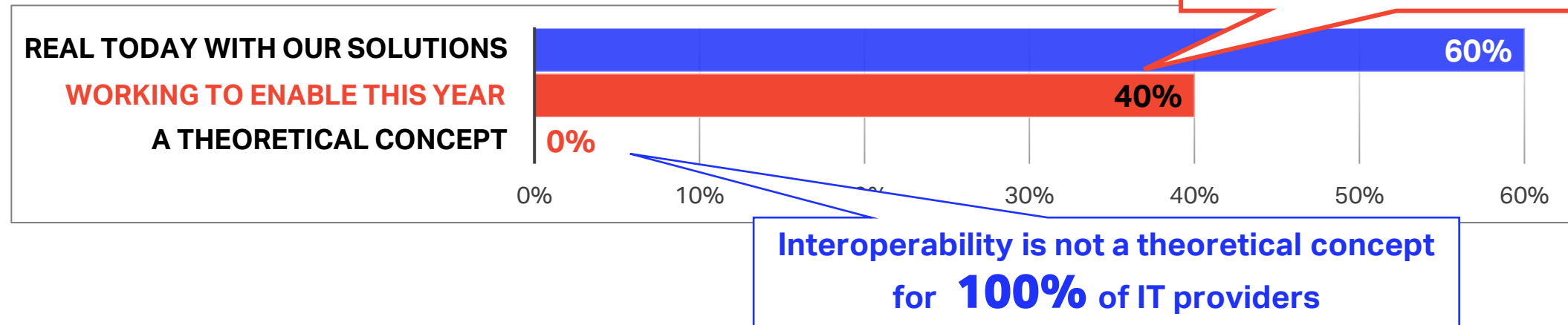


Source: IATA 2025 Surveys covering 20 IT providers (~64% of PSS market share).

IT providers support **modularity & interoperability** with 3rd parties on **three levels – now**



INTEROPERABILITY WITH 3RD PARTIES IS...



Source: IATA 2025 Surveys covering 20 IT providers (~64% of PSS market share).



Thank you!



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The 1st replay of multivendor Demo



Lufthansa Systems

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