

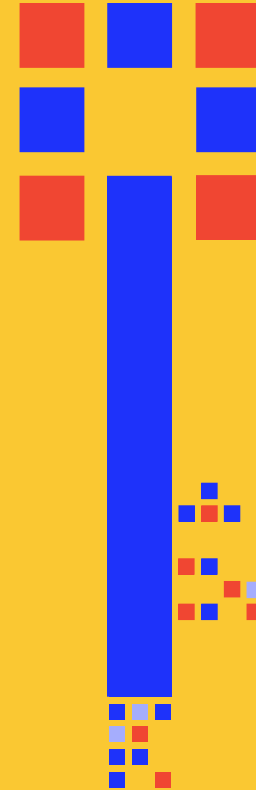
October 2026

Modern Airline Retailing

Readiness and Roadmap to 100% Offers & Orders

Through the lens of IT providers

Update 2026



Introduction



We **updated** consolidated **IT Provider plans** on **Offer & Order transformation** at an industry level in 2026

Introducing Offers & Orders Readiness and Roadmap survey

19

IT Providers

2/3

of PSS market*



The survey represents IT providers on a global scale in the O&O space. It was not an individual opinion pool – each response represents company plans and expectations.

- **The majority of IT provider respondents are non-PSS vendors.**

* Over 2/3 represents the share of incumbent PSS providers covered in the survey; the rest, < 1/3 of the PSS market today includes PSS in China, in-house PSS, and other PSS providers.

- **All results are self-reported.** For domain-specific questions, responses of IT providers who are active in a given domain are included only. Missing responses were ignored. Statistical results are reported by IT provider - e.g., average amongst respondents.
- **The 2026 survey** responses were gathered via the Offers & Orders Readiness and Roadmap (OORR) module of IATA's Airline Retailing Maturity (ARM) index program.
- **Each response is on behalf of the company**, not by an individual.



19 IT Providers took part in the survey in 2026

accelya



amADEUS

atpco

FLY R



ibsssoftware

ink



Lufthansa Systems

maureva

navitaire
an amADEUS company



sabre



unisys

VERTEIL

IT Providers answered a detailed questionnaire. Other IT Providers were contacted, but they chose not to participate in the survey.

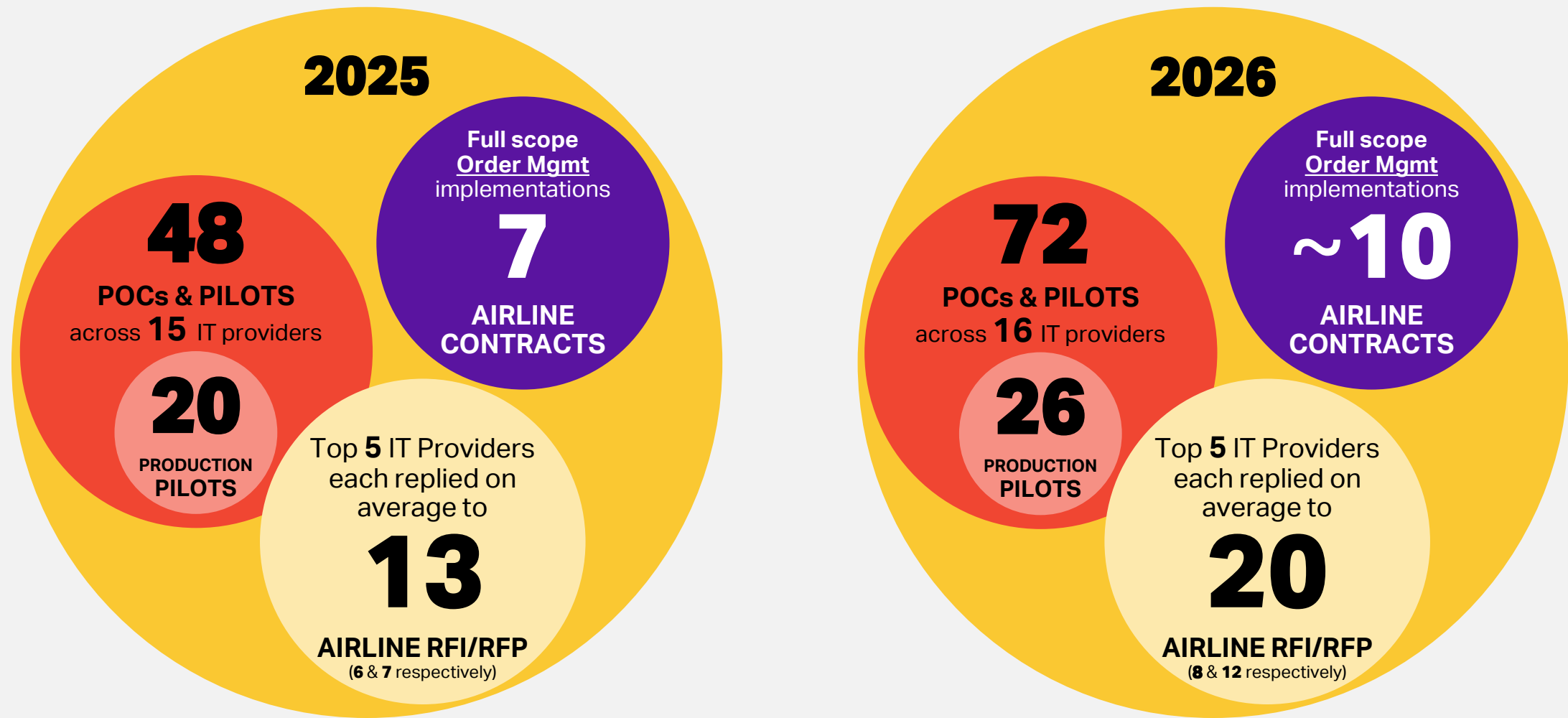


1

Highlights



O&O Transformation **momentum keeps growing**



Reporting periods: Jan 2024-May 2025, and Jan 2025-May 2026. A POC/Pilot represents an airline-IT provider pair engaged in a POC/Pilot – one IT Provider often runs several POCs and Pilots, and one airline can be part of several POCs and/or Pilots. POCs/Pilots in progress or completed.



IT providers invest **>\$1.7 billion, 700 million more** than in 2025, employing **>3'000 FTEs**

In total, IT providers invest over ¹

\$1.7 Billion
(+0.7 Billion vs 2025)

IT providers typically commit investment ² on O&O for

3-5 years

Approx.

3'000 FTEs

employed on O&O by **roughly half** of IT provider respondents

Average IT provider respondent employs

260 FTEs

on O&O transformation

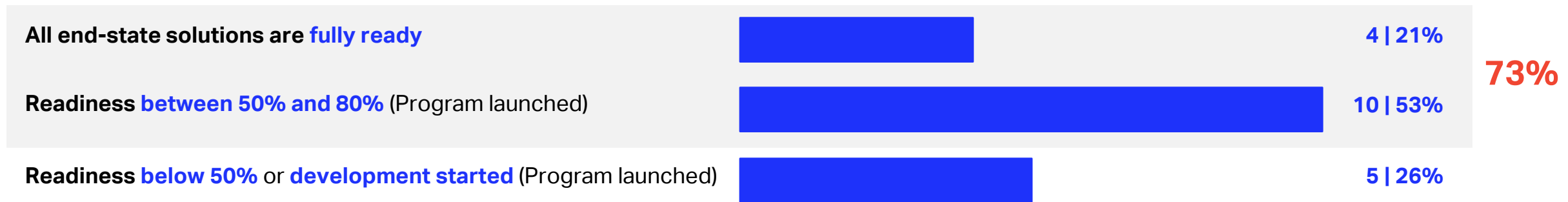
¹ Including total multi-year investment reported by IT providers in 2024-2026 IATA surveys. Note that many IT providers have not disclosed their investments to IATA.

² 3-5 years represent the middle half of IT provider answers (25%-75% percentiles).



3 in 4 IT provider solutions are >50% ready

Question: What is your company's **overall system readiness** on the journey to 100% legacy-free O&O?



Demo rollouts confirm IT provider momentum

IT providers can show you a demo in **over 90%** of cases

ACTIVE DOMAIN¹
 = DEMO AVAILABLE
 NO BOX = ANSWER NOT DISCLOSED

Domain specialists	IT Provider	Product Mgmt	Stock Mgmt	Offer Mgmt	Order Mgmt	Accounting ² Order-based	Delivery Mgmt ² Order-based
	ATPCo						
	OpenJaw						
	Verteil						
	Unisys						
	ACCA						
	Lufthansa Systems						
	Maureva						
	SAP						
	Sutherland						
	INK Innovation						
	Navitaire						
	TPConnects						
	FLYR						
	IBS Software						
	Sabre						
	Accelya						
	Amadeus						
	Hitit						
	Turkish Technology						
All domains							

NB: This is a non-exhaustive list of IT Providers. All IT providers from the 2026 survey are included for the consenting domains.

¹ Expected domains with at least partial (>30%-50%) core capability support by 2026 (green) or 2027 (pale green).

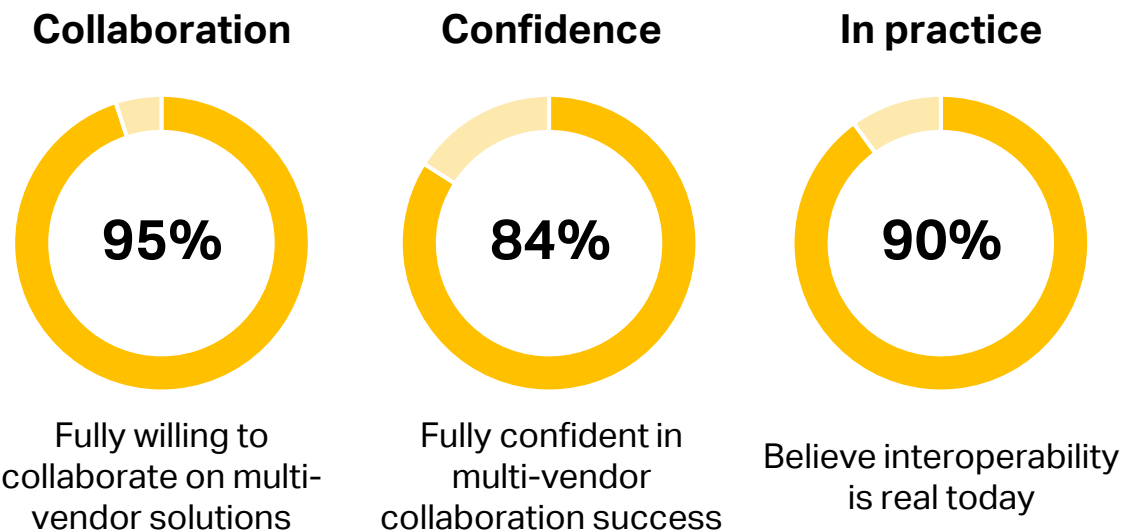
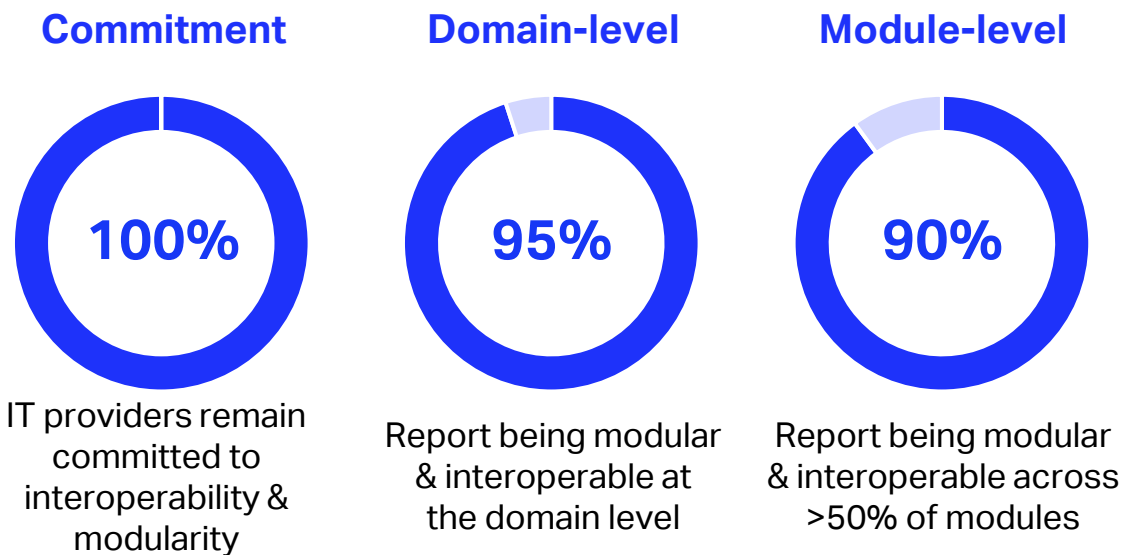
² In some cases, capabilities are provided in partnership with other IT providers.



Interoperability & modularity are getting real

COMMITMENT & CAPABILITY

MAKING IT REAL



80% Actively advancing interoperability this year



Execution confidence & constraints



Question: Do you already have sufficient resources (staff and investment) to execute the deliverables within the timelines you provide as the answers to this questionnaire?



2

Value Creation by Offers & Orders

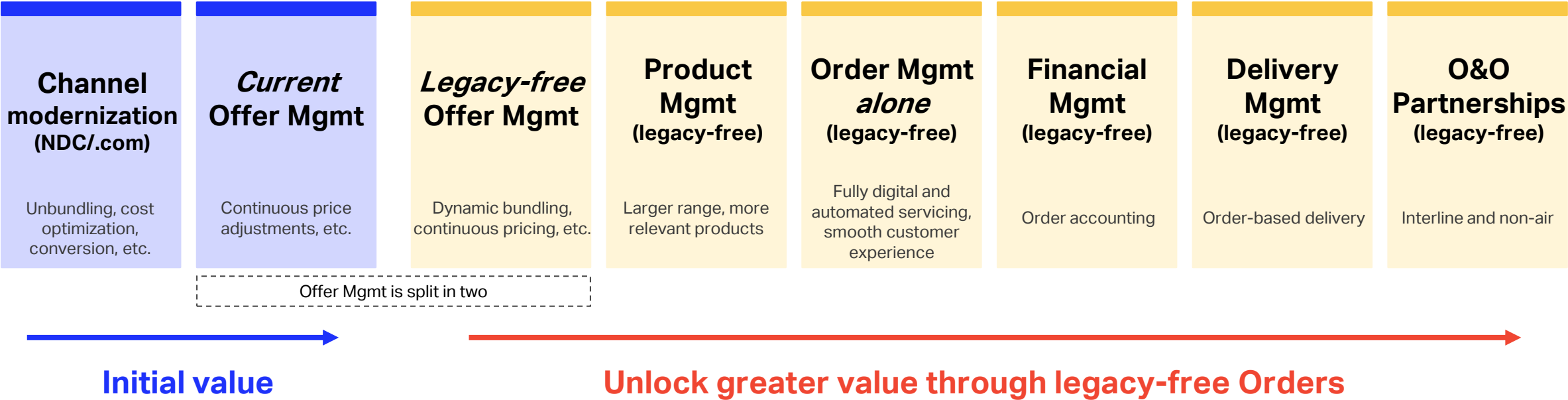


Introducing the **value unlocked by Order** Mgmt

To map value creation in airline retailing, we split total value creation by the below domains. Two domains can deliver value with current PSS; the remaining domains require legacy-free Order Management.

AVAILABLE WITH LEGACY PSS

VALUE LOCKED BY LEGACY PSS → UNLOCKED BY LEGACY-FREE ORDER MGMT



IT providers assessed value through ranking and weighted scoring, providing two perspectives on the same question. Both approaches yielded consistent key conclusions, despite some differences in detailed rankings.

Value creation mechanisms listed under the domains are illustrative examples.



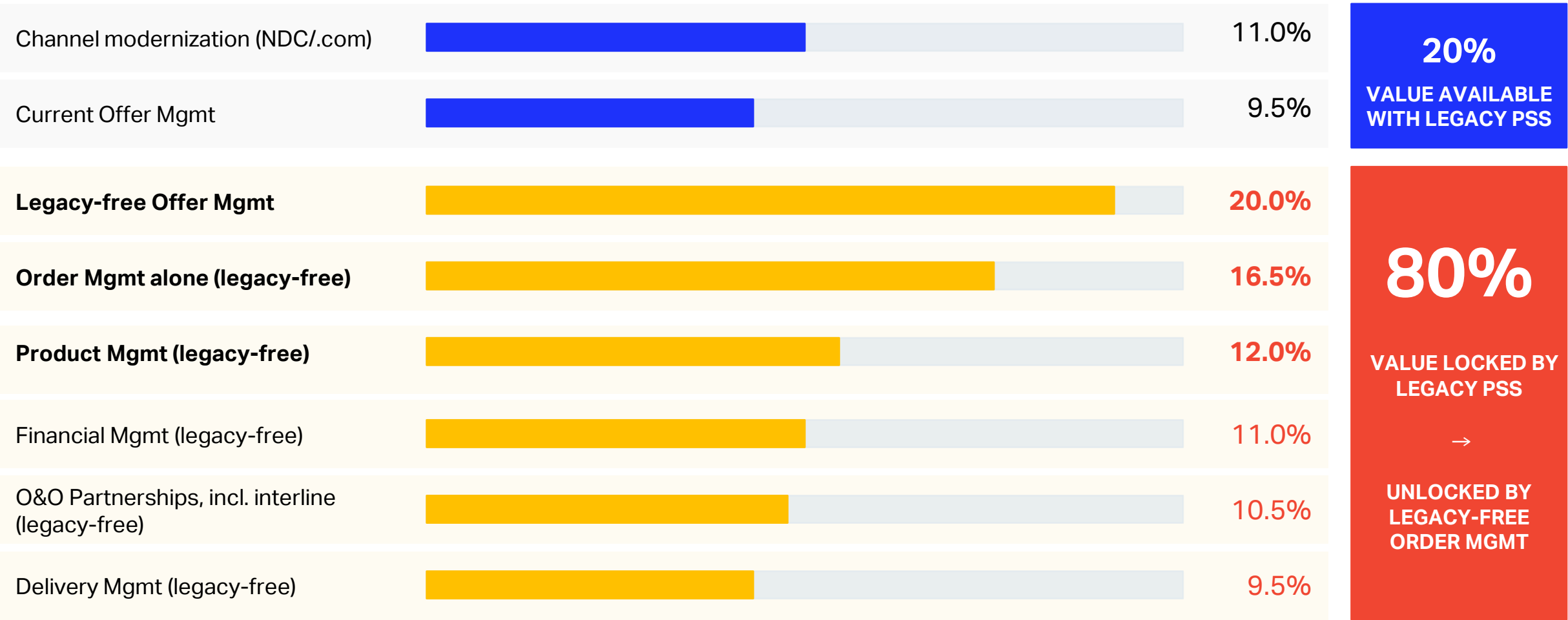
Top 3 legacy-free **value creators** in airline retailing: **Offer, Product and Order Mgmt**

RANK		
TOP 3	2	Channel modernization (NDC/.com)
	6	Current Offer Mgmt
	1	Legacy-free Offer Mgmt
	2	Product Mgmt (legacy-free)
	3	Order Mgmt alone (legacy-free)
	4	O&O Partnerships, including interline (legacy-free)
	5	Financial Mgmt (legacy-free)
	6	Delivery Mgmt (legacy-free)
		VALUE AVAILABLE WITH LEGACY PSS
		VALUE LOCKED BY LEGACY PSS
		→
		UNLOCKED BY LEGACY-FREE ORDER MGMT

Ranking value creation by domains. Both items ranked 2 received the same average rank. Assessment using both questions converged on the same key conclusions, despite some variations in detailed rankings. Lower average rank = higher perceived value.



Greater value ahead: Legacy-free Orders unlock 80% of total perceived value, with added gains across all domains



Weighted scoring of value creation by airline retailing domains, rounded to the nearest 0.5%. Assessment using both questions converged on the same key conclusions, despite some variations in detailed rankings.



Continuous Pricing: consistent value creation

reported by IT providers

Industry status on Dynamic Offers – Zoom into current Offer Mgmt.

	ADDED VALUE PER PAX		NUMBER OF PLAYERS LIVE ⁴
	Measured in 2025 ²	Reported in 2026 ³	AIRLINES
Continuous Pricing: Flights ¹ (air products, science or rule-based)	3%–4%	3.5%–6.0%	> 35
Continuous Pricing: Ancillary Products ¹ (science or rule-based)	3%–6.5%	4.0%–7.0%	> 50
Dynamic Bundling			~5

¹ Away from legacy filed fares restrictions.

² Reported results from production, e.g., actual measurement from A/B testing (with test & control groups), typically in limited scope. Figures qualified either as *Proven scientific measurement* or *Provable expectations*.

³ Figures qualified as *Educated guess based on e.g. scientific simulation or data, Provable expectations, or Proven scientific measurement*.

²⁻³ Data excluding outliers (range for the central half of responses, i.e., 25%-75% percentiles).

⁴ Number of airlines estimated based on 2025 & 2026 IT provider surveys. Number of active IT providers is approx. 5-10.



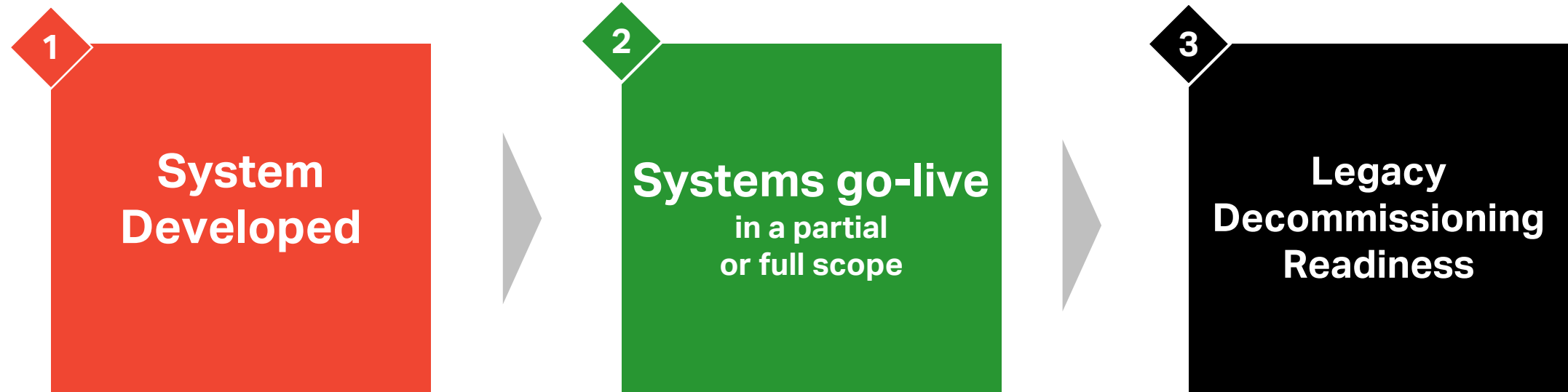
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IT Provider Roadmap to 100% Offers & Orders



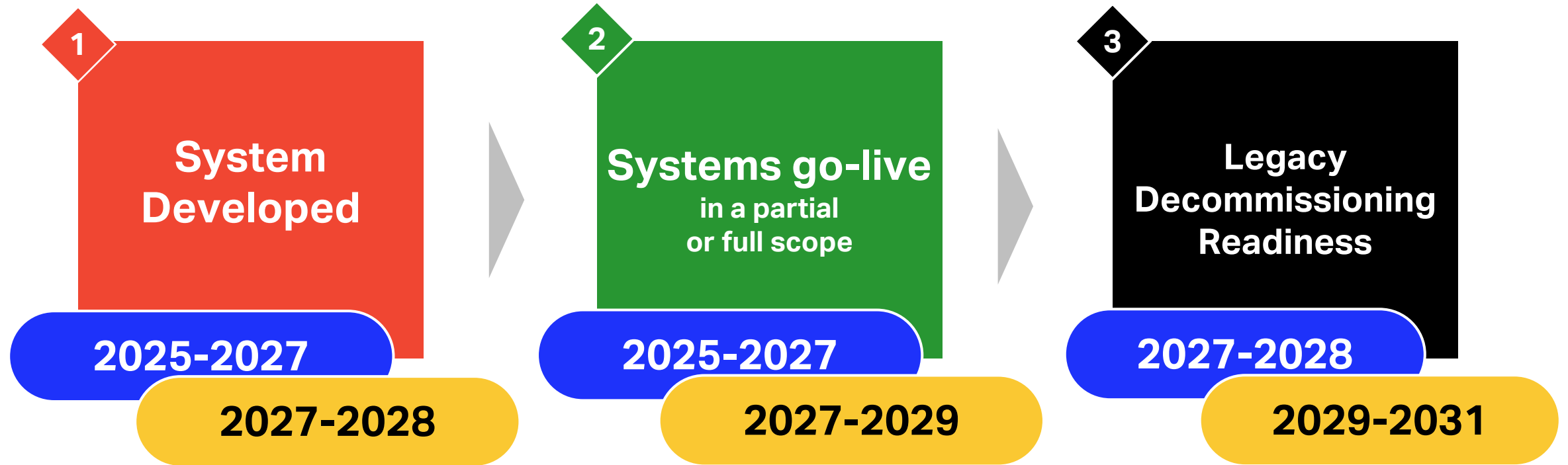
IT Provider **Roadmap** to 100% Offers & Orders

Outline



IT Provider **Roadmap** to 100% Offers & Orders

Outline



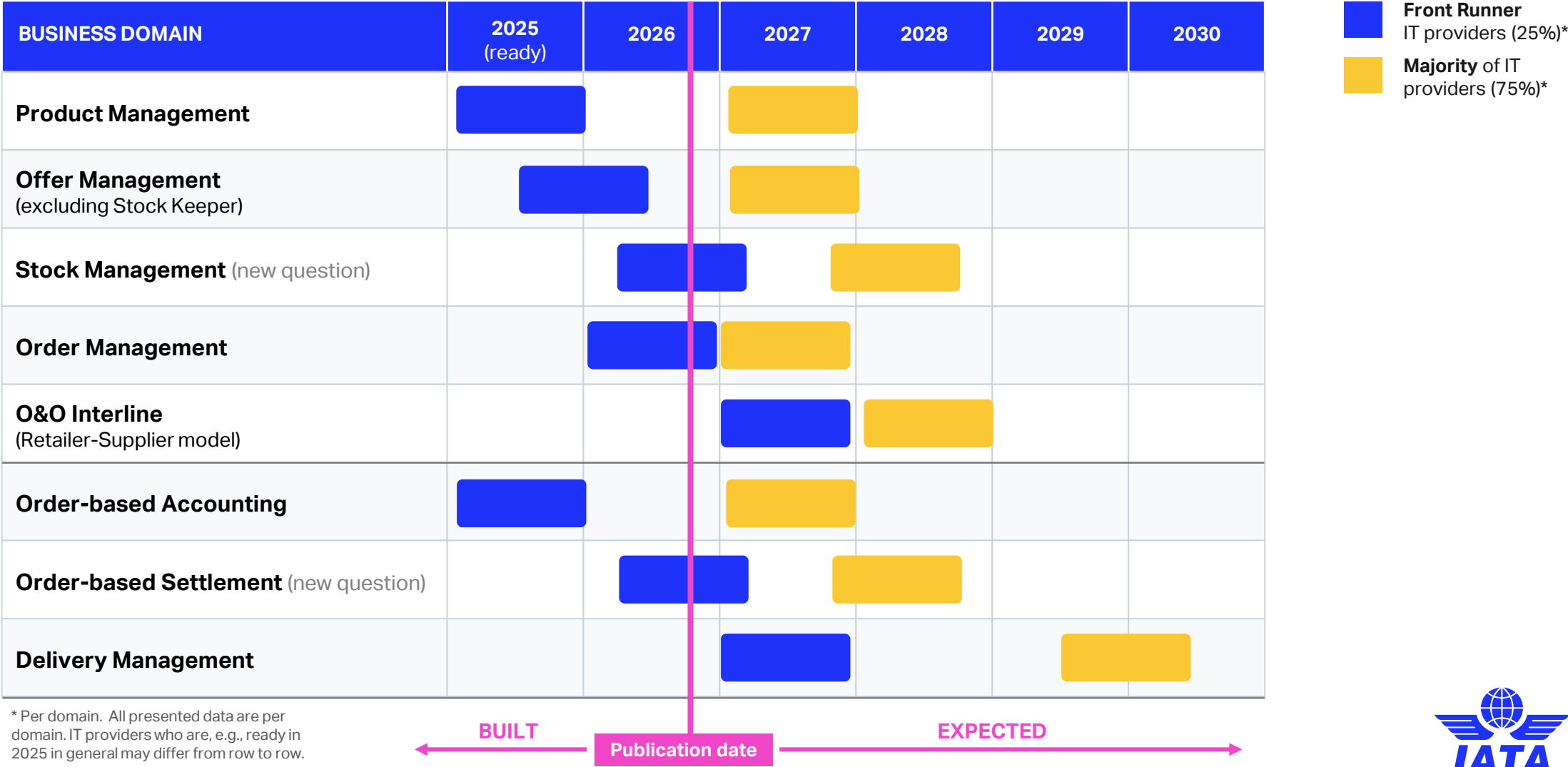
Front Runner
IT providers (25%)

Majority
of IT providers (75%)



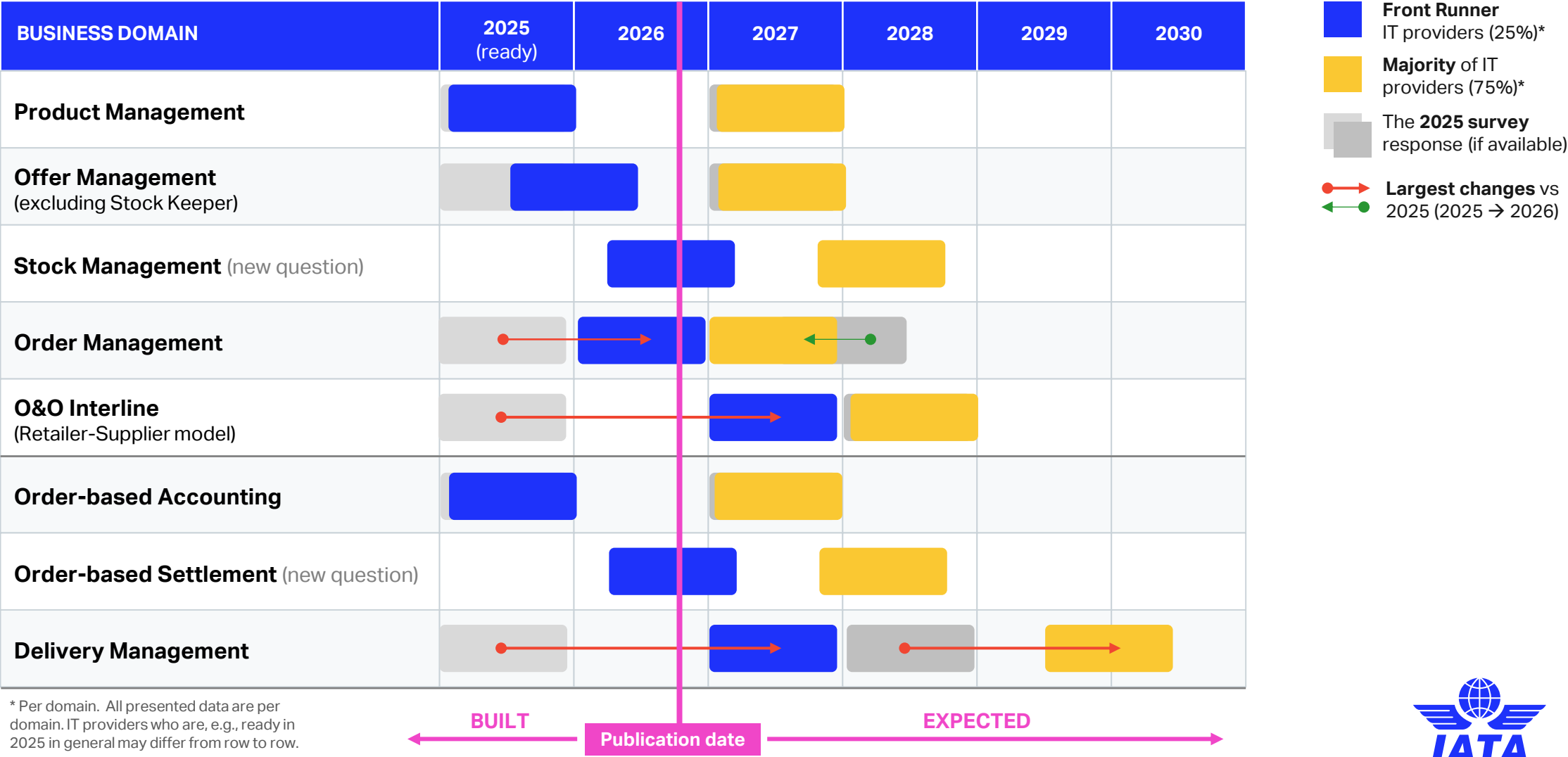
Systems built & production-ready mainly by 2026-2028

The fastest 25% of vendors expect most solutions ready by the end of 2026, the fastest 75% of vendors by 2028, with Delivery and O&O Interline often taking ~1 year more.



Systems built & production-ready mainly by 2026-2028

The fastest 25% of vendors expect most solutions ready by the end of 2026, the fastest 75% of vendors by 2028, with Delivery and O&O Interline often taking ~1 year more. Year on year, timelines remain broadly stable: Order mgmt. build peaks in 2026-27, Delivery shifts by 1.5-2 years, O&O Interline's 75% readiness target holds.



Front runners live or launching by 2027

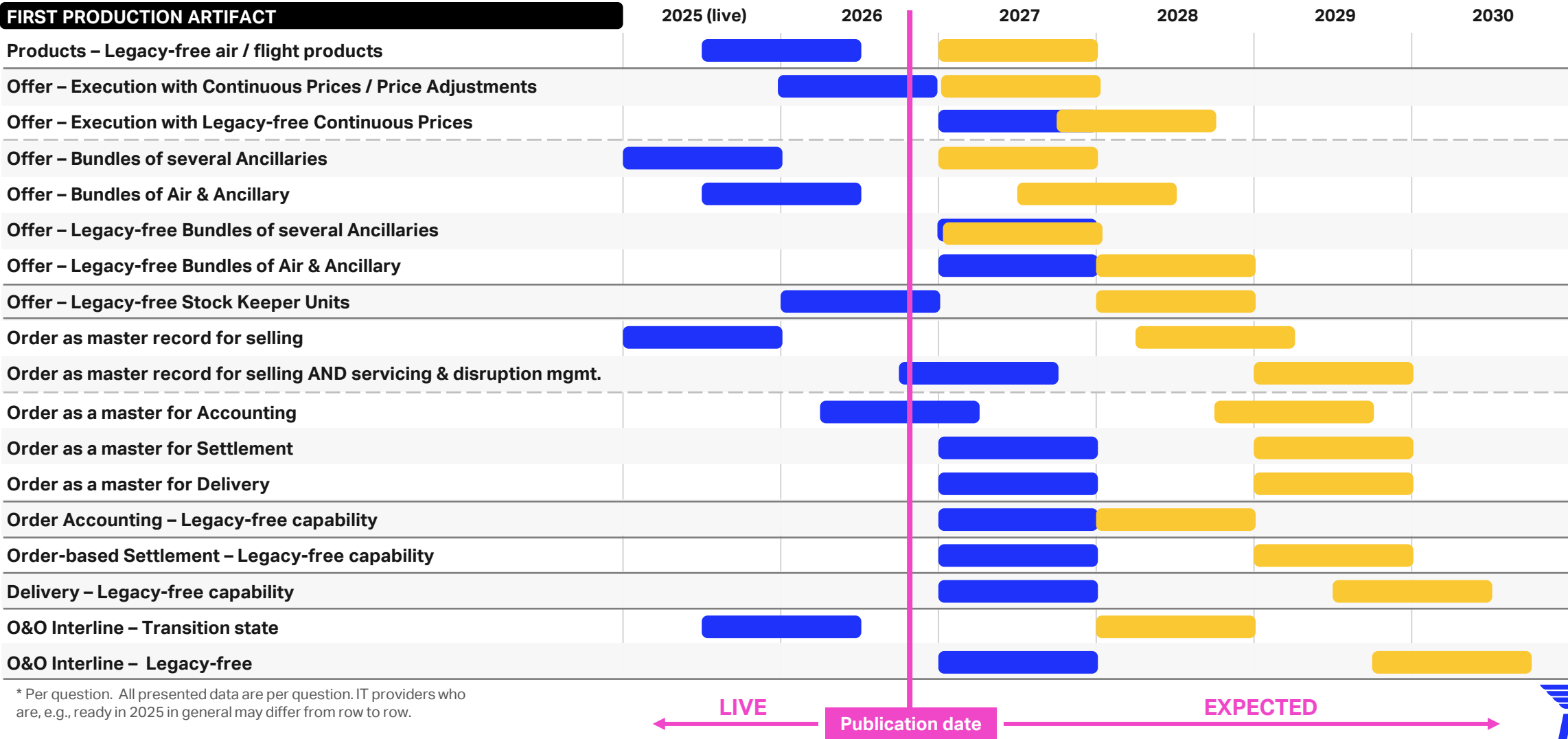
The fastest 25% of vendors remain on track for launch with airlines by 2027: some are already live and ahead with Bundling & Master Orders for Selling (green arrows). The fastest 75% of vendors report airline go-live delays of 1-2 years (red arrows): expect Offers by 2027 and Orders and Fulfillment by 2028-2029, lagging on Accounting, Delivery and O&O Interline.

Front Runner
IT providers (25%)*

Majority of IT
providers (75%)*

The 2025 survey
response (if available)

Changes vs 2025

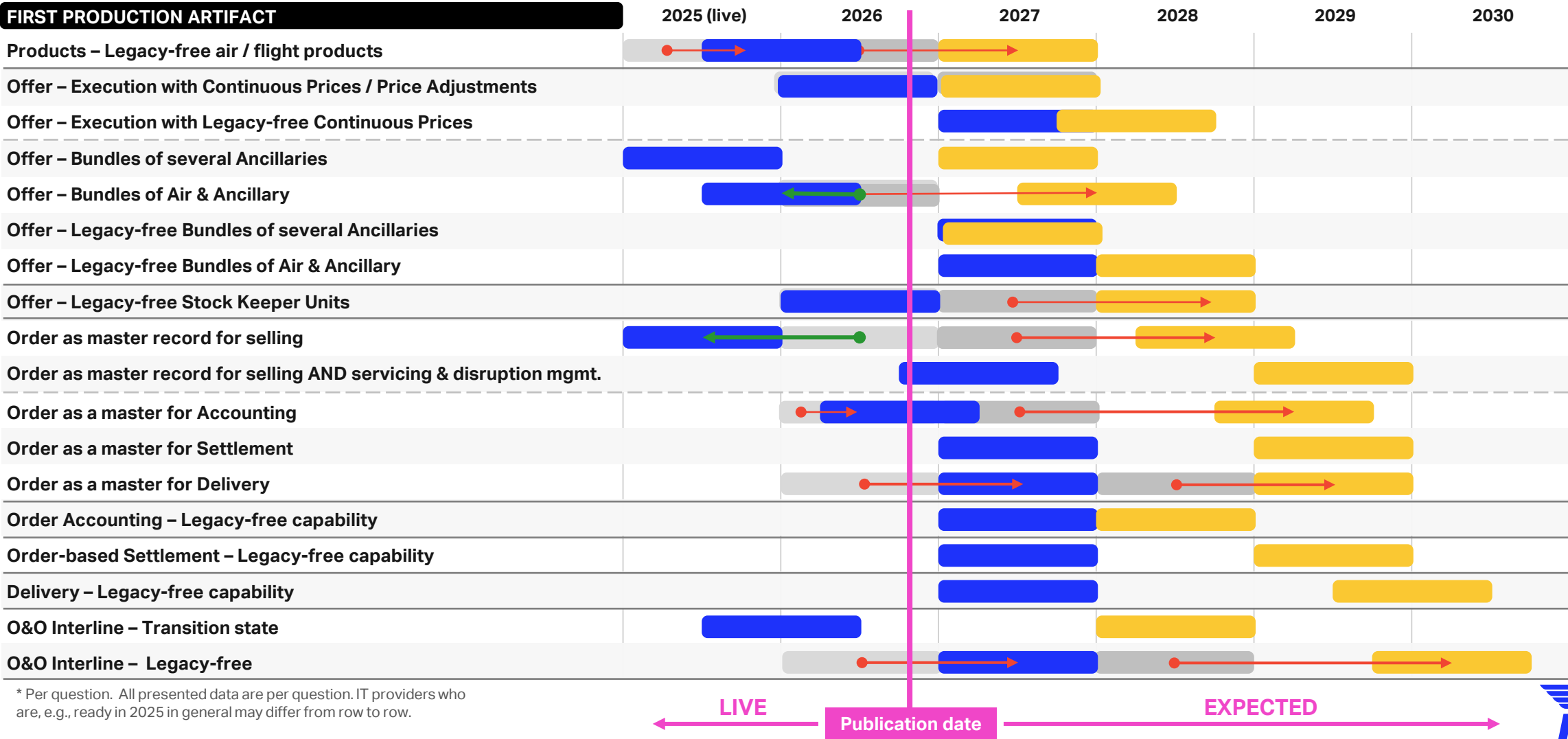
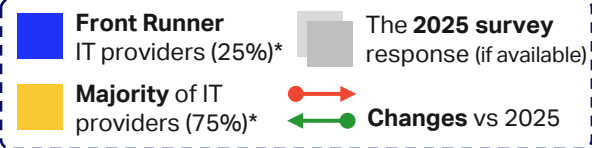


* Per question. All presented data are per question. IT providers who are, e.g., ready in 2025 in general may differ from row to row.



Front runners live or launching by 2027

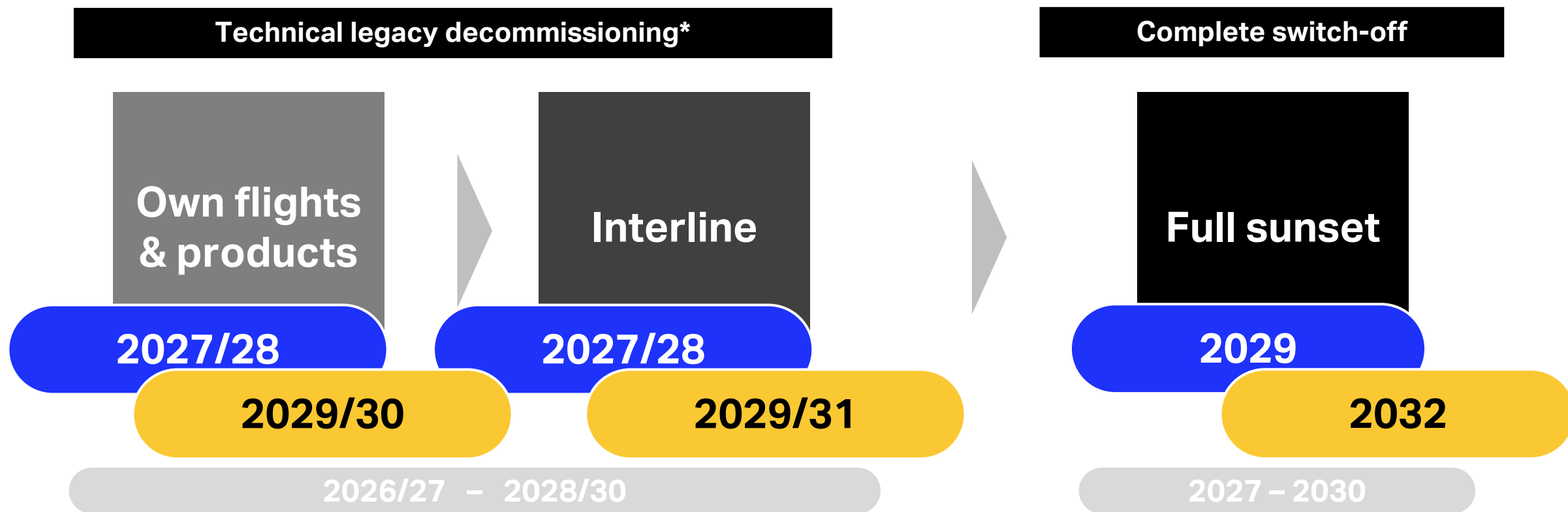
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Start of **legacy decommissioning** shifts by **1-2 years**



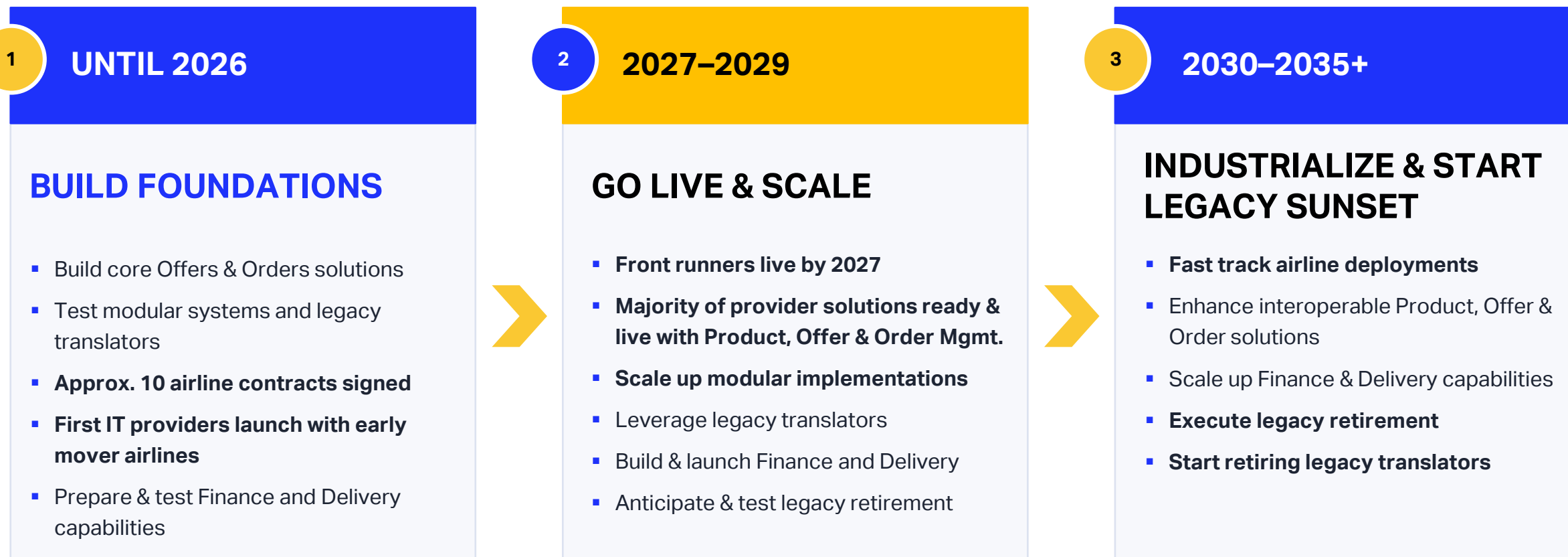
■ **Front Runner** IT providers (25%) ■ **Majority** of IT providers (75%) ■ The **2025 survey** response

***Technical legacy decommissioning** = stop syncing with legacy for a minimum of 1'000 travelers. Statistical results are for the first customer of an IT provider.



IT provider **transition roadmap to 100% O&O**

Summary



Disclaimer: Roadmap based on current knowledge and high-level dependencies; timelines may vary by IT provider, airline size, business model and region. Subject to change based on external and internal industry factors.



Thank you!



Appendix

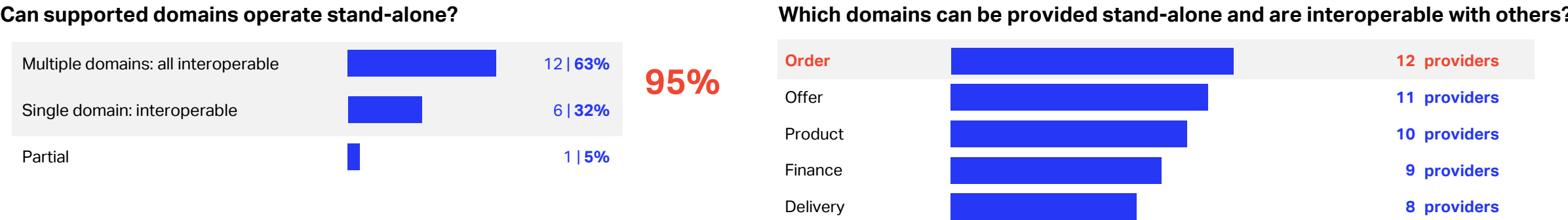


Interoperability & modularity: Universal commitment, 95% domain-level and 90% module-level interoperability, Order leads

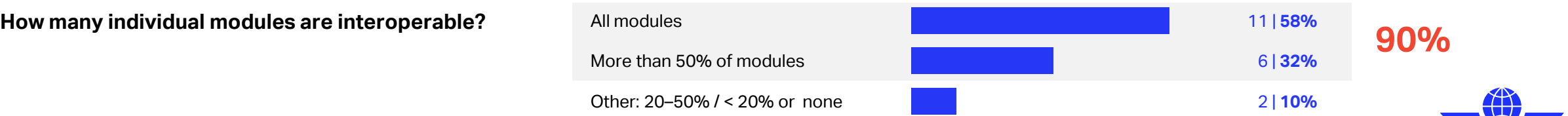
1 Overall commitment



2 Business-domain interoperability



3 Module-level interoperability

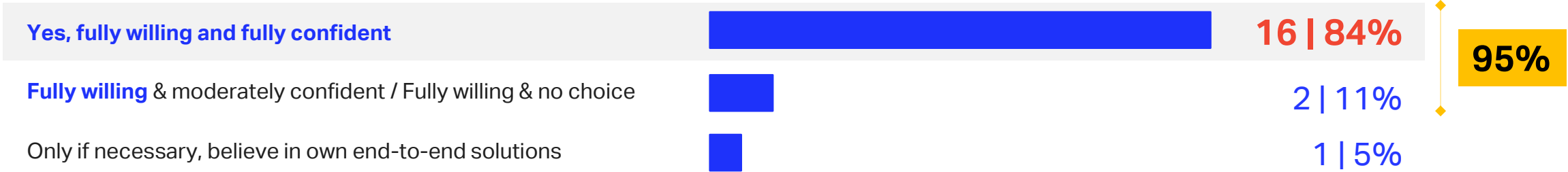


Interoperability in practice: **95% fully willing** and **84% fully confident** in success of **multi-vendor solutions**

Approx. 90% of IT providers believe interoperability is real today and approx. 80% are actively advancing it this year

MULTI-VENDOR COLLABORATION

Willingness, commitment, and confidence to jointly deliver end-to-end Offers & Orders?



THIRD-PARTY INTEROPERABILITY

Is third-party interoperability operational today?



