

Welcome, thank you for joining us today

The event will begin shortly We start at 2 pm CEST





LIVE PRESENTATION IN PROGRESS

Welcome to the webinar

Yanik Hoyles, Director Distribution, IATA



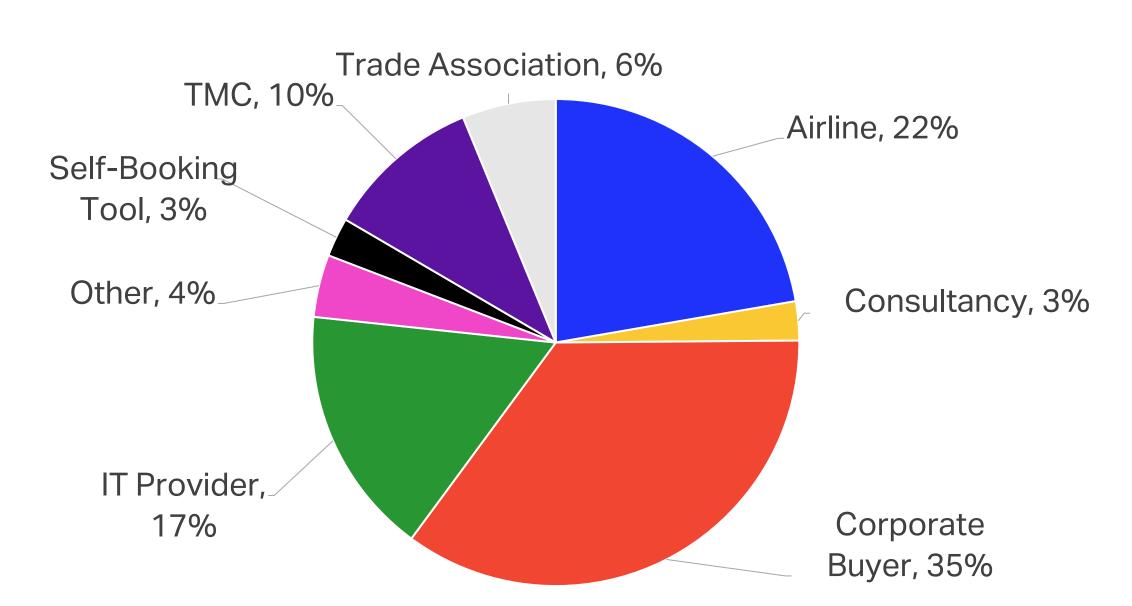
Competition law guidelines

Do not discuss:

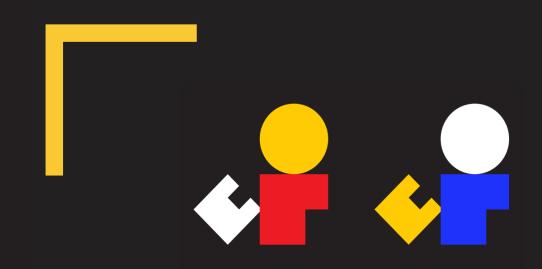
- Any element of prices, including fares or service charges
- Commissions
- Allocations of customers or markets
- Marketing plans, commercial terms or any other strategic decision
- Group boycotts
- Your relations with agents, airlines, system providers or other third parties
- Any other issue aimed at influencing the independent business decisions of competitors



WHO IS IN THE ROOM?





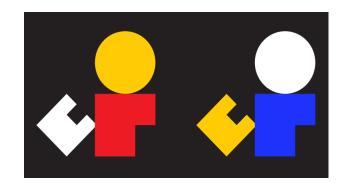


Opening and Welcome

Muhammad Albakri, SVP Customer, Financial and Digital Services, IATA



Content



1	Restart Insights - An Industry Perspective
2	Rethinking Demand - Will Business Travel Ever be The Same Again?
3	Taking The Initiative - Airline Industry Initiatives To Accelerate The Restart
4	Pivoting to Value Creation
5	Accelerate - Increasing NDC Adoption in Business Travel



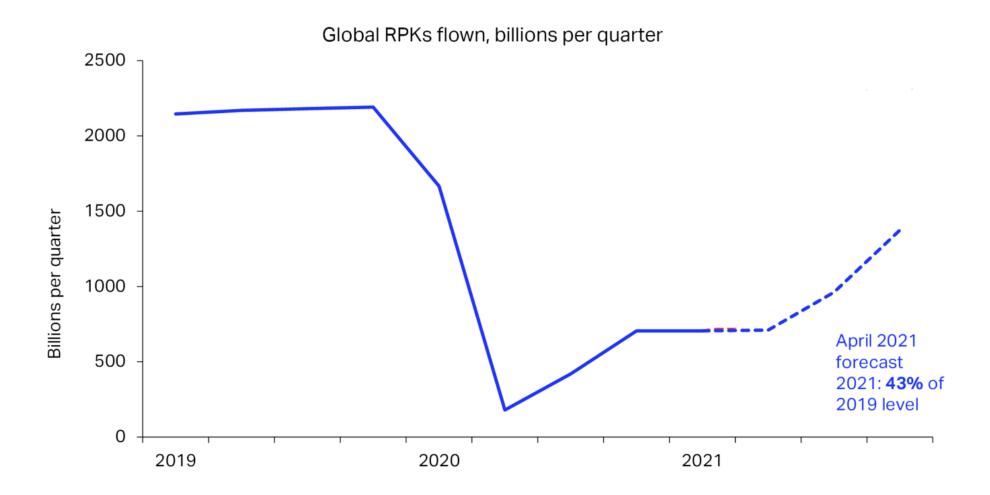


LIVE PRESENTATION IN PROGRESS

Restart Insights - An Industry Perspective

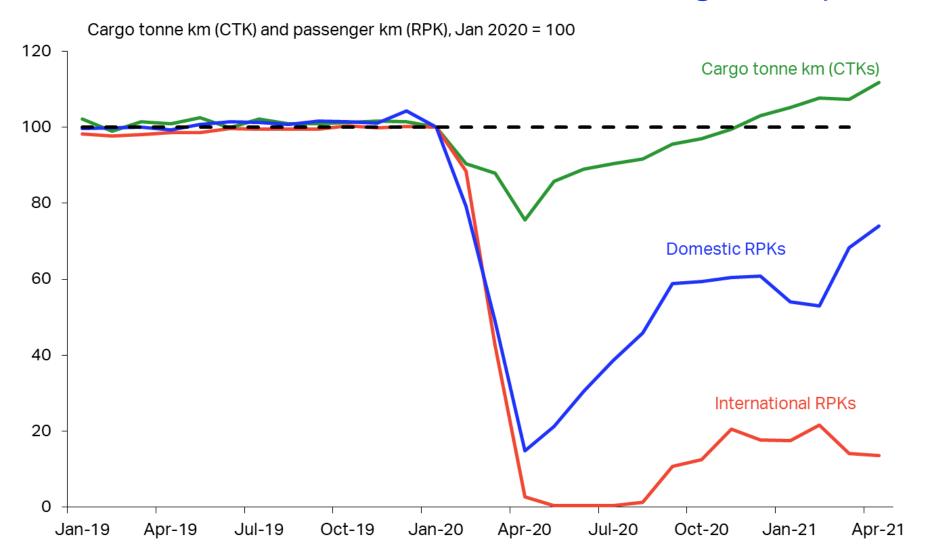
Olivier Hours, Head Distribution Strategy, IATA

2021 traffic remains weak due to border closures Second half of the year will be stronger thanks to vaccine



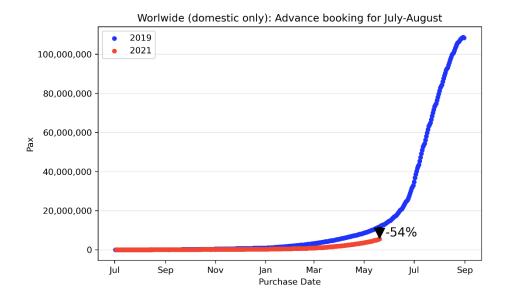


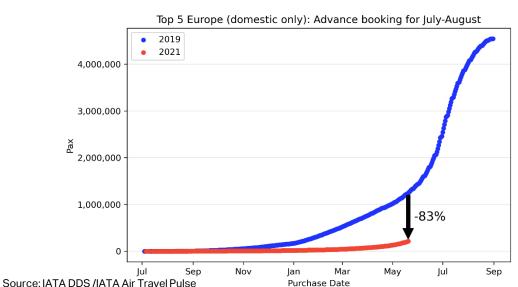
Domestic rebound is now accelerating International is stalled at a low level while cargo overperforms

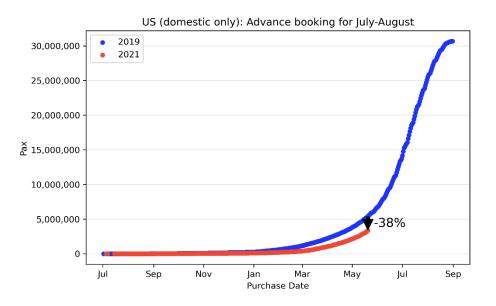


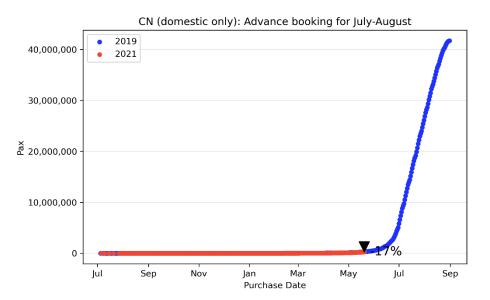


Some countries see booking accelerate for the summer US and China are driving the industry rebound





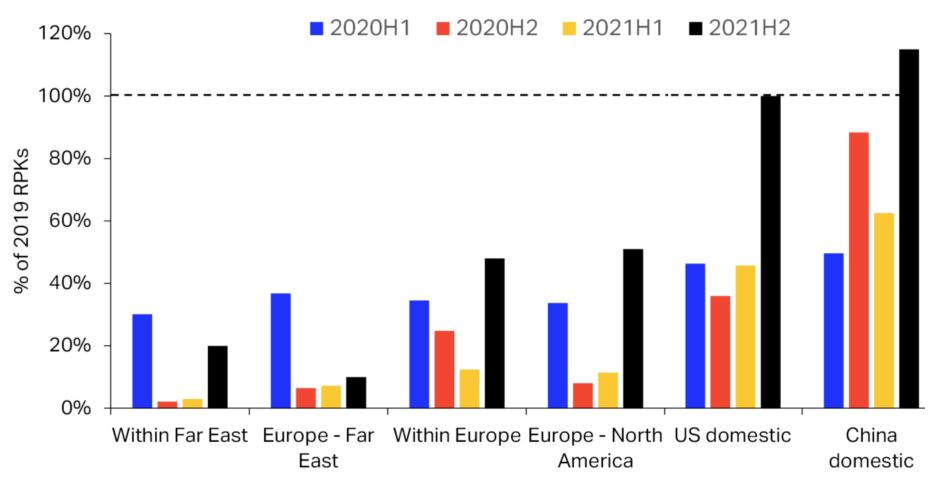






This is driving a performance gap between regions Domestic getting close to 2019 level

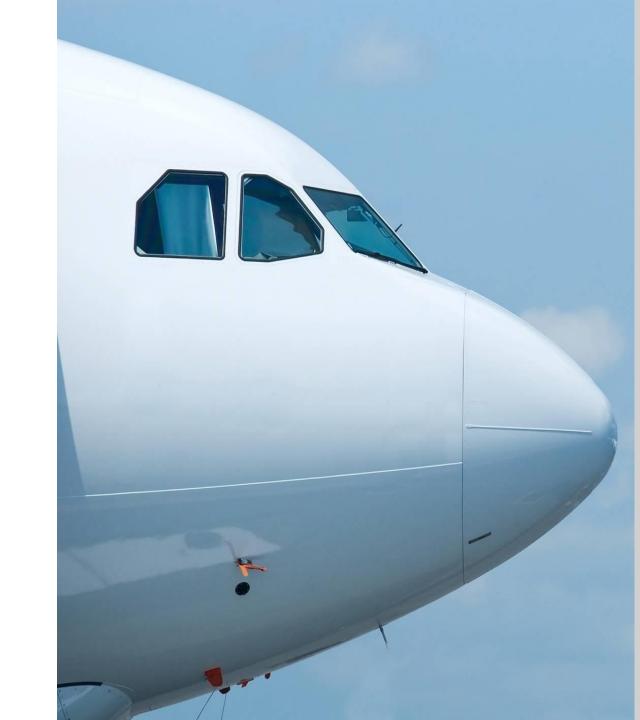






Industry perspectives

- Fuel price
- Level of debt
- Cash flow
- Cargo performance
- Environment
- Digitalization
- Flexible schedule & pricing
- Emerging markets



Distribution changes

- Wave of M&A
- Content management
- Impact of technology
- Enhanced servicing
- Enhanced duty of care
- New commercial models



Corporate travel trends

- Value of travel
- RFP process review
- Dynamic pricing on the horizon
- Evolution of payment
- New user interfaces
- Traveler's choice to fly



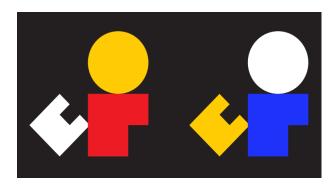


QUESTIONS

Go to the Q&A panel at the lower right side of your screen



Content



1 Restart Insights - An Industry Perspective

Rethinking Demand - Will Business Travel Ever be The Same Again?

Taking The Initiative - Airline Industry Initiatives To Accelerate The Restart

Pivoting to Value Creation

Accelerate - Increasing NDC Adoption in Business Travel







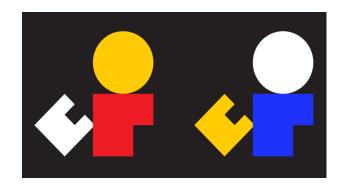
LIVE PRESENTATION IN PROGRESS

Rethinking DemandWill Business Travel Ever be The Same Again?

Moderator: Paul Tilstone, Managing Partner, Festive Road

Diane Lundeen-Smith, Senior Manager Global Air & Ground Programs, Microsoft Claudia Adams, Travel Manager, Allianz Karen Hutchings, Global Head of Travel, Meetings and Events, EY

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LIVE PRESENTATION IN PROGRESS

Taking The Initiative - Airline Industry Initiatives To Accelerate The Restart

Muhammad Albakri, SVP Customer, Financial and Digital Services, IATA

Industry Restart & Recovery

A plan for reconnecting the world



Three pillars to support the Industry Restart

Safely Reopening Borders Safely
Restarting
the Aviation
System

Restore
Consumer
Confidence &
Stimulate
Demand



21 15 June 2021

Safely Reopening Borders

Biosafety for air transport Removing travel restrictions

Management of health credentials



22 15 June 2021

Safely Restarting the Aviation System

Ensuring operations readiness

Comply with safety & regulatory reqs

Balancing capacity & demand



Restore Consumer Confidence & Stimulate Demand

Restore all travelers' confidence

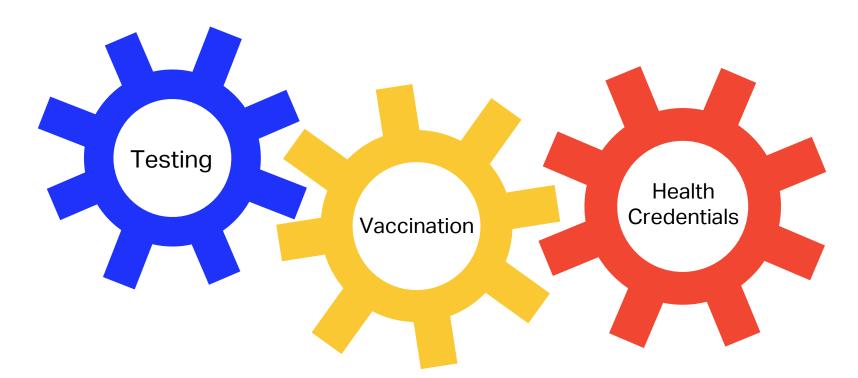
Stimulate travel with incentives

Keep traveling financial & admin threshold low



Priorities remain the same

- Re-open borders
- Remove travel restrictions
- End quarantine measures





Acting today for a safe restart tomorrow



- Endemic virus is our new reality
- Risk mitigation no risk-free environment



- Vaccination exemption of constraining measures
- Testing affordable, fast & convenient
- Health Credentials int'l standards needed



- Contact tracing to address residual risk
- Roadmaps restarting needs advance preparation



26 15 June 2021

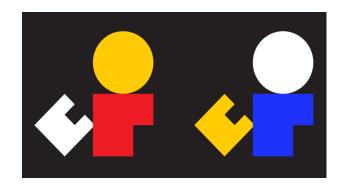


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LIVE PRESENTATION IN PROGRESS

Pivoting to Value Creation

Yanik Hoyles, Director Distribution, IATA

Pivoting to
Airline Retailing &
Value Creation

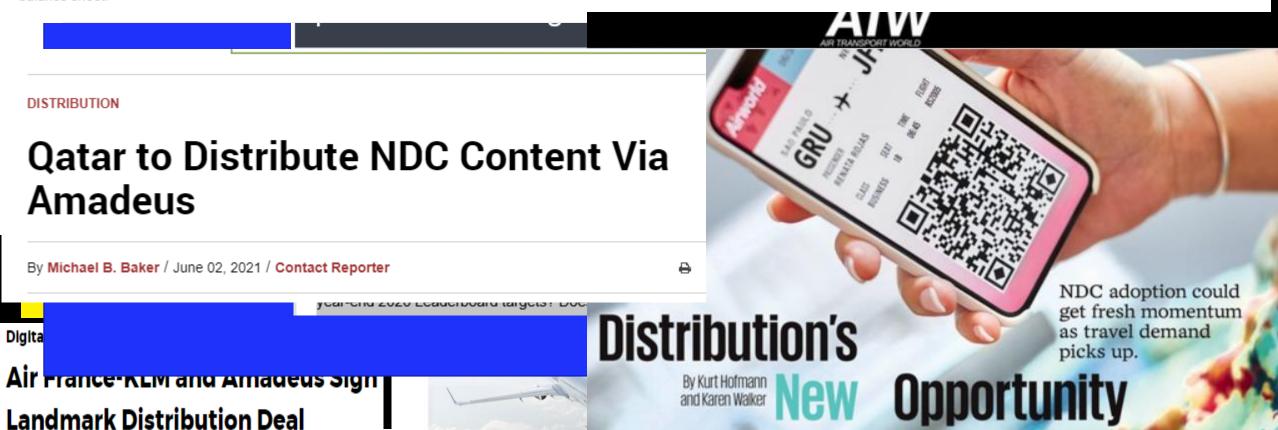




DECREASE TARGET PRICE

LHAG.DE: Deutsche Lufthansa - A lot to work through – but performance recovery targets becoming clearer

Equity gap illustrates importance of asset disposals and labour cost restructuring – post-pandemic margin commitment increasing: In this note, we: (i) update our estimate of Lufthansa's 2024E equity gap to €2.9bn as net debt rises to €12.4bn in 2021E, with modest positive FCF returning in 2022E – this emphasizes the importance of LHA's asset disposal strategy (AirPlus, LSG, LH Technik) which could ultimately realize comparable proceeds, and (ii) re-iterate the importance of unit labour cost savings to LHA's margin improvements over the last cycle, driving 29% of EBITDAR gains from 2014, as we monitor progress on restructuring the labour and non-labour cost base. We welcome management outlining its thoughts on absorbing corporate traffic weakness (via premium economy, direct distribution). Confirmation that management expects to emerge from the pandemic with (eventually) structurally higher margins is aspirational for now, in our view – however, it at least establishes a goal for LHA to lone with a credible, more granular, roadmap to achievement. We look forward to this coming in time, with the potential to advance the investment case as asset disposals start to repair the balance sheet.



Certifications have grown 16% despite the crisis







NDC Airlines across all continents





NDC IT Providers, Aggregators and Sellers

ATPCO / SITA [□] BCD Travel Clarity Travel Technology Solutions **Expedia Group** Farelogix An Accelya Group Company **FARENEXUS GROUP INC** ITA Software by Google KAYAK Software, Co **Kiu System Solutions** LinksRez **Navitaire** Sabre GLBL Inc SAP Shree Partners LLC. Thomalex **TripActions** Tripadvisor, LLC **Unisys Corporation**

WTMC

"Sirena-Travel" JSC 2e Systems GmbH Air Black Box AirGateway GmbH Amadeus IT Group S.A. APG Atriis Technologies Limited Click Travel Clyde Travel Management **Datalex DRCT** Duffel Easylinkz LTD Flight Centre Travel Group Hitit Computer Services Hogg Robinson Group **IBS Software Private Limited** INDRA ISO Software Systeme GmbH JR Technologies

Logitravel Group On Travel Solutions Limited OpenJaw Technologies Paxport Peakwork AG pribas airline solutions GmbH PROS. Inc. RAMAX INTERNATIONAL Trailfinders Ltd Travel Planet Travel Technology Interactive Travelfusion Ltd TravelgateX Travelport Websky Tech WINGLET WorldTicket Ypsilon, Net AG

(Zeeyarah) Superior Tracks Travel & Tourism LLC
Al Woujdan Travel & Tourism

Flyazmeel (Azmeel International Agency For Travel & Tours)

NDCMarketplace.com

Pravasi Travel

Theta Technologies

TPConnects

Trans-End Technologies Pty Ltd.

TRAVVISE LIMITED

AirSky Information Beijing Daran Aviation Service Beijing Symbiosys Information Technology BEIJING UNIFIFI TECHNOLOGY China Air Service CHONGQING YUNSHANG AVIATION TICKETING Chongging Zhouyou Technology East China Cares System FLIGHTROUTES24 TRAVEL Guangzhou Travelsky Technology NDCHUB Sabre Travel Network Taiwan SHENZHEN HUOLI TRAVEL AGENCY Shenzhen Tehang Air Services Sichuan Aîrailways International Travel Skywide Network Technology Tencent Cloud Computing(Beijing) TravelLink Technology TravelNDC Technology Travelsky Trip.com Group Wintelia Technology Wuhan Vetech Technology Development

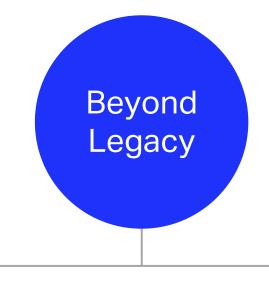
Airlines Technology
Alpha Red Services Sdn Bhd
Birdres Technologies
Calculus Systems.
Corporate Travel Management
Craft Co., Ltd
INFINITI SOFTWARE SOLUTIONS
INTERPARK
Jebsen Travel Limited

Mystifly Global Consolidation and
Technology
Nihon Unisys, Ltd.
NuFlights
Polarium Inc.
Serko Limited
VERTEIL TECHNOLOGIES
WinSystem Inc.

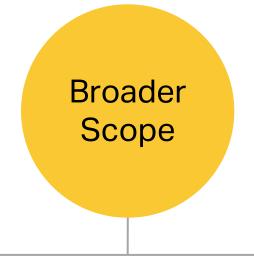
Pivoting to Airline Retailing & Value Creation



Airline Retailing - a world of Offers & Orders



 Replacing E-tickets, EMDs and PNRs with Offers and Orders



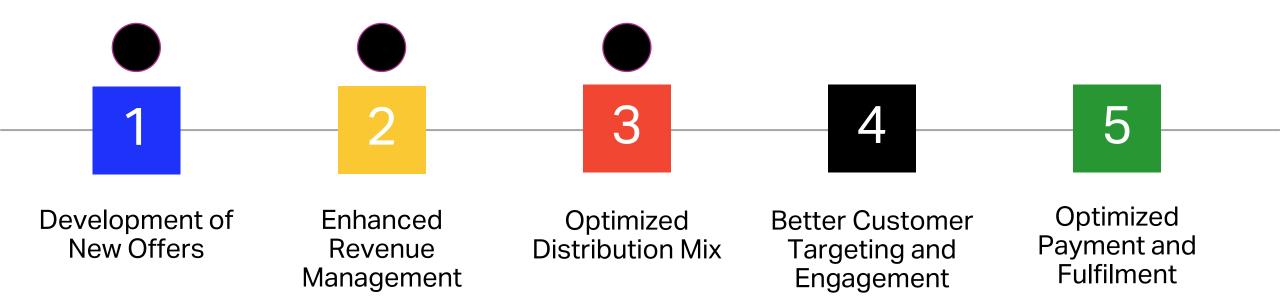
- •NDC
- Dynamic Offers Creation
- Future of Interline
- •ONE Order
- Settlement with Orders

Integrated Commercial Strategy

Fully integrate
 Distribution and
 Payment



Airline Retailing Creates Value in 5 ways





Corporate Buyers see value in this journey

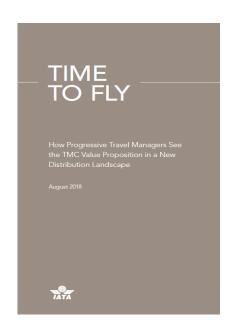


- Content
- Control
- Cost
- Customer Experience

They also value their partners

They have views on the future of the TMC...

and on the necessary changes to get there





And the value chain is working together

20 Organizations participating

Airlines: AA, IAG, UA, LHG,

• Airline IT: Farelogix, JRT

■ TMCs: BCD, FCM, CTM, CWT, Egencia

■ Mid-Back Off: Tramada, Midoco

SBT: Concur

Aggregators: Amadeus, Attriis, Sabre, Travelport,

Travelfusion, Verteil Technologies



And it leads to a Customer Centric Industry that creates value

For Customers

- Better Value for Money
- Greater Transparency
- Personalized Services

A modular & architecture based on modern standards

For intermediaries

- Modern Capabilities
- Improved Customer Value Proposition

For Airlines

- Become Retailers
- Increase Revenues
- Lower Costs



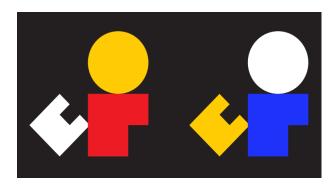


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5





LIVE PRESENTATION IN PROGRESS

Accelerate -

Increasing NDC Adoption in Business Travel

Moderator: Shaunelle Harris Drake, Head implementation, IATA

Paul Cronje, Director, Clyde Travel Management John H. Palomino, Vice President, Travel Commerce & Experience Strategic Air Content Development, BCD Travel Michael Otto, NDC Product Owner Order Management, British Airways

Accelerating TMC adoption of NDC

7 / 9 addressed

9 accelerators

- Goal identify & propose solutions for top technical challenges
- Order Management covering servicing aspects (4)
- Offer Management TMCs can shop with confidence (3)
- Others require specific setup at airline or TMC (2)

No showstoppers

- None prevent ticket issuance
- Airlines and TMCs have solutions that work today

Finding common solutions

- Standard approaches
- Implementation
- Mindset shifts





For which TMC accelerator topics have you been observing progress?

- Offer Management topics
 Helping you to shop with confidence
- 2. Order Management topics
 Helping you streamline servicing requests
- 3. Mindset shifts towards retailing Factoring in corporate internal processes





9 TMC Accelerators

No showstoppers

Look to the common solutions



Accelerating TMC adoption of NDC

TMC Accelerator Page

Accelerator

4 blockers Servicing Capabilities

3 blockers Shopping with confidence

> 1 blocker Queue Management

1 blocker Multi-channel access to Orders

- 6. Lack of automated involuntary servicing processes implemented by airlines
- '. OrderHistory not implemented by airlines
- 8. Refund processing is not streamlined across the value chain, preventing downstream automation.
- 9. Need for streamlined implementation processes when TMC requests multiple changes to an Order on the same day (exchange/void) scenario
- Missing data from airlines for downline processes (e.g. tax breakdown, reference to original order in servicing scenarios)
- 2. TMC are receiving offer conditions and offer descriptions in different ways OR not at all
- 3. Varied implementation of Price Guarantee by airlines impacts approval processes
- 5. Existing queue capabilities and processes depending on passives need to be rebuilt
- 4. Inability to service an order when a TMC is supported by multiple NDC API users





Stay tuned...







VALUE
CREATION IN
AIRLINE
RETAILING BY
THE INDUSTRY



► VALUE CREATION IN AIRLINE RETAILING BY THE INDUSTRY

Moderator: Paul Tilstone, Managing Partner, Festive Road

Final questions and closing comments

15:50 - 16:00

Wednesday 9 June 2021
14:00 - 16:00 CEST
08:00 - 10:00 EST

	08:00 - 10:00 EST
14:00	Welcome Back
14:05 – 14:15	Airlines in the lead Development of new products & services in a world of airline retailing: Hear from American Airlines
14:15 – 14:25	Airlines in the lead Development of new products & services in a world of airline retailing: Hear from British Airways
14:25 – 14:35	Airlines in the lead Development of new products & services in a world of airline retailing: Hear from Qantas
14:35 – 14:50	Airline Panel Different airlines can have a very different approach to development of new products and services and how they engage with the customer. Hear about some of these approaches.
14:50 – 15:10	Business Momentum – Case Study #1: Corporate Travel Management
15:10 – 15:30	Business Momentum – Case Study #2: BCD Travel
15:30 – 15:50	Business Momentum – Case Study #3: ATPI



Thank you and see you soon!

