



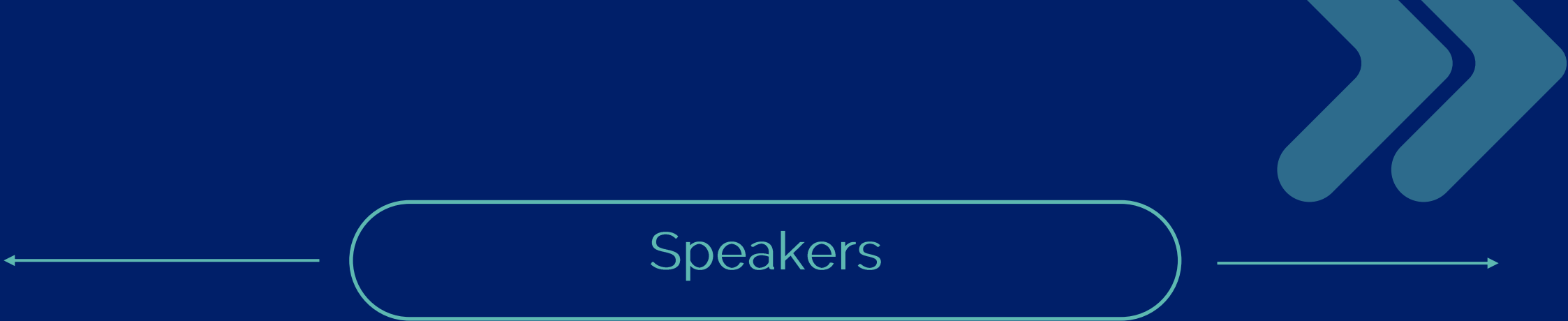
Take control



WAF Workshop: AI-Powered Airline Retail: Building the Case & Delivering Results

October 8, 2025





Speakers



Lesley Harris,
Chief Operations
Officer, Accelya



Boris Padovan,
CCMO, Travel In
Motion



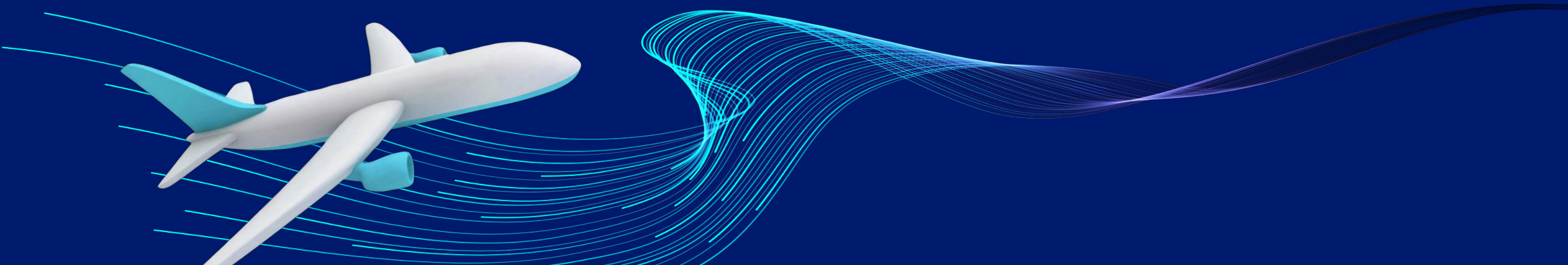
William Cavendish
VP Business Development
Accelya



Robin Kanthareuben
Technology Leader
Travel & Hospitality
AWS

Agenda

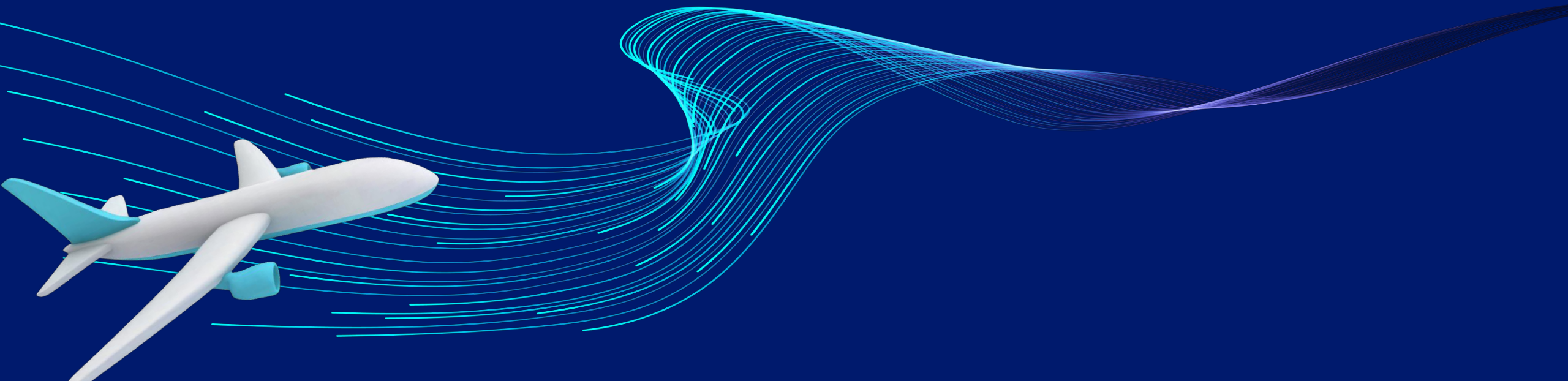
- Welcome
Lesley Harris, Chief Operations Officer, Accelya
- Modern Airline Retailing, Status Update
Boris Padovan, CCMO , Travel In Motion
- Building AI-Powered Airline Retailing on a Proven Foundation
William Cavendish, VP Business Development, Accelya
- Travel companies want to be the Amazon of Travel
Robin Kanthareuben, Technology Leader - EMEA, AWS





Boris Padovan

Modern Airline Retailing, Status Update



Travel in Motion offers various products and services to meet our customer's needs.

Strategic consulting.

TiM and Oystin offer structured, yet a flexible and highly customisable approach to strategy solutioning. Airlines can benefit from solution consulting from distribution strategy to solution selection and implementation. Vendors are supported through industry benchmarks and solution reviews.



Training.

Various training programmes related to distribution, NDC, and the offer and order transformation support the industry moving forward.

Audits.

A set of audits validate an airlines distribution contracts, the overall strategy as well as various aspects of the NDC implementation and operations.

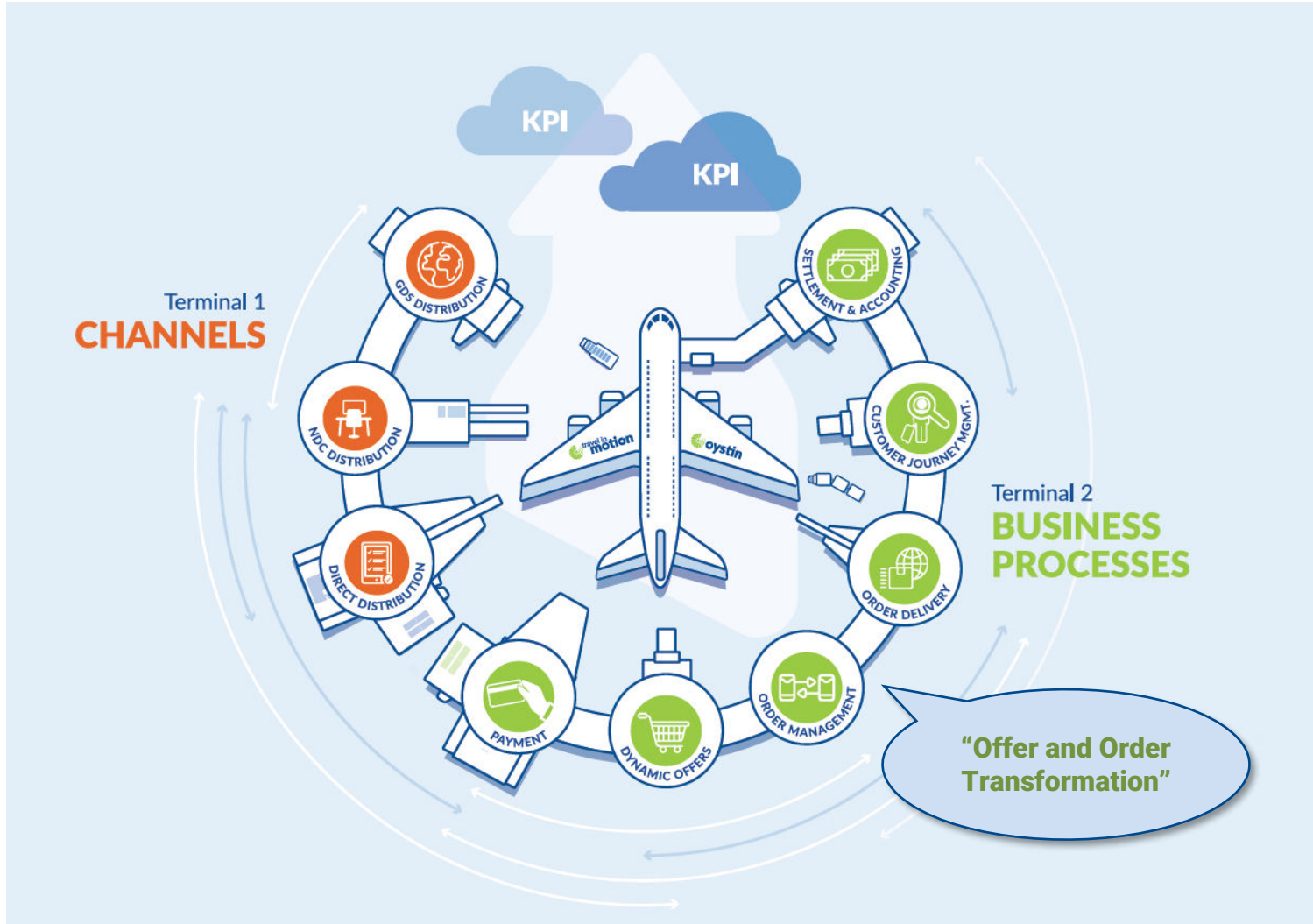
Industry publications.

Regular whitepapers, blogs and podcasts are published every few weeks to provide thought leadership and insight to the airline industry.

Travel in Motion airline and other non-vendor customers.



There is a large-scale change in the airline industry, especially in the commercial area with distribution and “Modern Airline Retailing”.



Why are the airlines changing?

- Control distribution
- Personalise and enrich offers
- Simplify and automate
- Increase profitability
- Improve customer experience
- Streamline operations

According to IATA's 2024 survey, 14 IT providers replied on average to 7 Airline RFI/RFPs and they are working on 39 POCs and pilot programmes with airlines.

2024 IT Provider Survey:
The move to 100% Offers & Orders is happening

business domain coverage by RFI /RFP and POCs / Pilots								
Number of	Measure	Overall	Product Mgmt.	Offer Mgmt.	Order Mgmt.	Offers & Orders-based Interline	Financial Mgmt. (Order accounting)	Delivery Mgmt. (Future of DCS)
Airline RFI / RFP Responded by each IT Provider	Average	7	4	6	5	3	2	>1
Non-production Airline POCs & Pilots	Total (All IT Providers)	29	5	13	15	11	11	<3
Airline Pilots in Production	Total (All IT Providers)	10	< 3	7	3	-	< 3	-

Average is among IT Providers active in the respective business domains. A POC/Pilot represents an Airline-IT Provider pair engaged in a proof-of-concept or pilot implementation (in progress or completed). A single airline RFI/RFP or POC/pilot covering several domains is counted once in each business domain. One IT Provider often runs several POCs/Pilots, and one airline could be part of several POCs/Pilots.



The IATA Modern Airline Retailing Consortium is focusing on defining key components of the transformation.

Consortium activities
Business Case
Reference Architecture
Industry transition
Airline IT transition
Procurement Considerations
Delivery with Orders
Business Process Re-engineering



Several airlines have made decisions on their provider of parts of or their complete ecosystem. Several airlines are looking at hybrid “build and buy” approaches.

PSS and GDS incumbents securing launch customers for their Digital Retail Environment (DRE) product suites.

- Amadeus Nevio: AF-KL, British Airways, Finnair and Saudia
- Sabre Mosaic: Virgin Australia
- Modular (Sabre + Flyr): Riyadh Air

Examples of new approaches towards modularity

- ANA is advancing using a step-by-step approach via numerous PoCs to “test and learn”
- Turkish Airlines: Developing core OO internally, purchasing key components such as dynamic pricing
- LATAM: large in-house development footprint for core orchestration and channel management components.



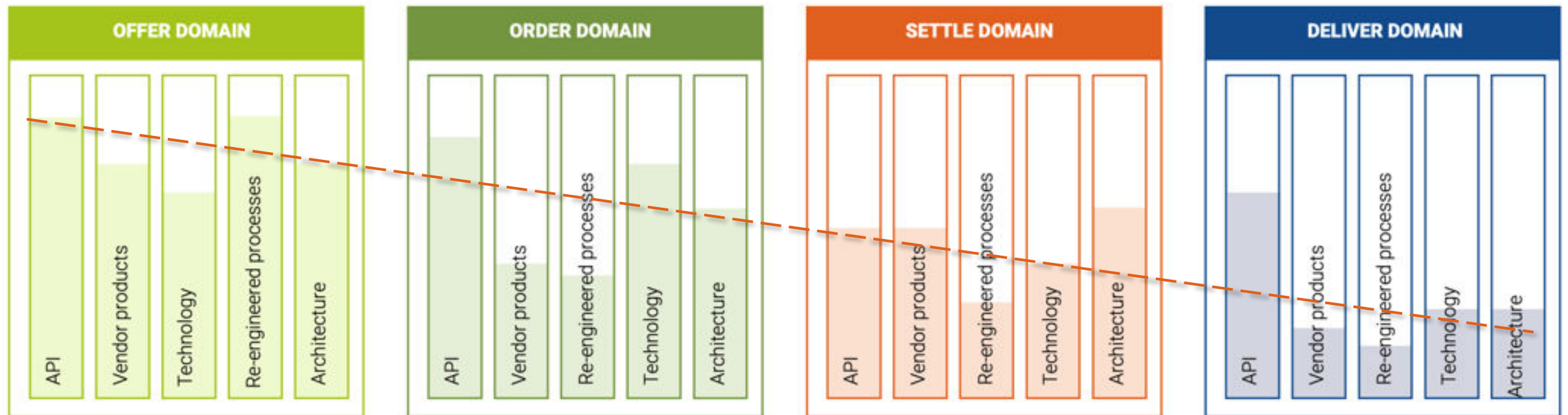
TiM's view.



- The transition to Modern Airline Retailing has started
- Many airlines are looking at their options
- TiM is engaged in numerous projects, covering the whole “lifecycle”
- Several projects are either running or start, soon

TiM's view – Offer, Order, Settle and Deliver maturity.

- Current projects focus is more on Offer and Order and less (for time being) on Settle and Deliver
- However, Settle is gaining in momentum, especially as accounting providers have caught up
- Uncertainty around future of Deliver still exists



TiM OOSD domain maturity assessment as of Q4'2024

The value of Offers and Orders has been quoted as roughly \$7USD per passenger – a very generic calculation.

1 PSS Centric

State Description

Current state – utilising legacy PSS which enables legacy processes only, with enhancements added to enhance eCommerce and some API direct-connect distribution.

IATA value creation scale:



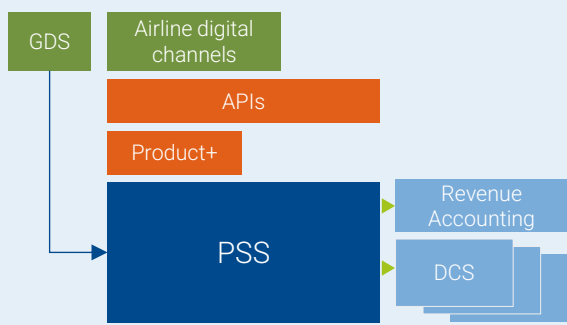
\$1.50

Per Passenger Boarded

Key benefits:

- + Enhance basic offers
- + Calendar-based shopping
- + Basic ancillaries
- Legacy technology, lack of agility
- Business must align to legacy capability
- Limited value-creation potential

Architecture



2 Enhanced offer capability

State Description

PSS still the core system of record, however, the offer determination capabilities have been enhanced to drive additional revenue through eCommerce and NDC channels.

IATA value creation scale:



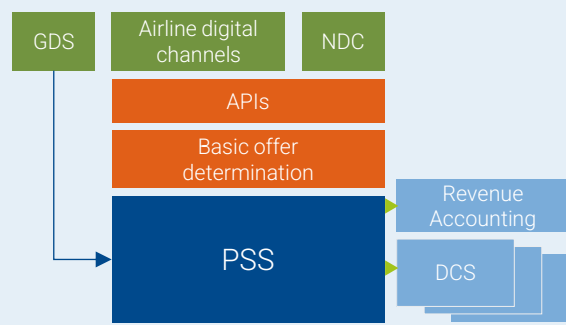
\$3.50

Per Passenger Boarded

Key benefits:

- + Benefit from flexible indirect distribution
- + Enhanced ancillaries
- + Alignment of offer to “controlled” channels
- + Faster time to market for new products
- Limited product types can be made available
- Legacy records still hinder retail aspect

Architecture



3 Enhanced offers with basic orders

State Description

Enabling airlines to utilise segmentation and dynamic pricing to optimise revenue, the order facilitating initial intermodal sales and initiate the reduced reliance on PSS, allowing for enhanced journey management, automation and process improvements.

IATA value creation scale:



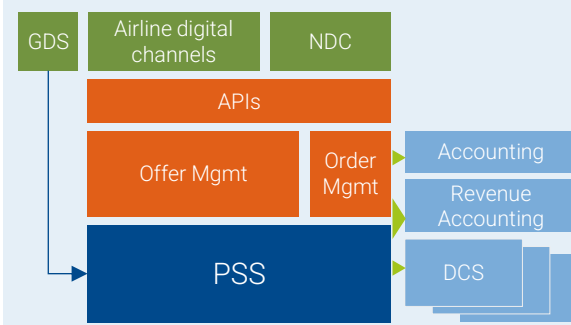
\$4.50

Per Passenger Boarded

Key benefits:

- + Considerable distribution cost savings
- + Implement advanced retailing technologies such as segmentation, dynamic pricing
- + Utilise order for enhancing basic processes
- + Legacy footprint decreases
- Legacy cost increase, mixed model

Architecture



4 Offer and Order Management

State Description

Allows airlines to take full advantage of flexible and dynamic offers, service and accounting processes enhancements and considerable opportunity to model the airline business to ecommerce and retail models, being fully customer centric.

IATA value creation scale:



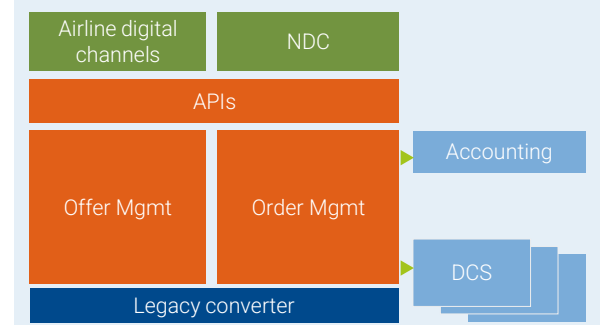
\$7.00

Per Passenger Boarded

Key benefits:

- + Distribution fully airline controlled
- + Wide array of products available
- + Retail ease of integrating 3rd party products
- + Enhanced ability to analyse Offer and Order data
- + Removal of legacy cost

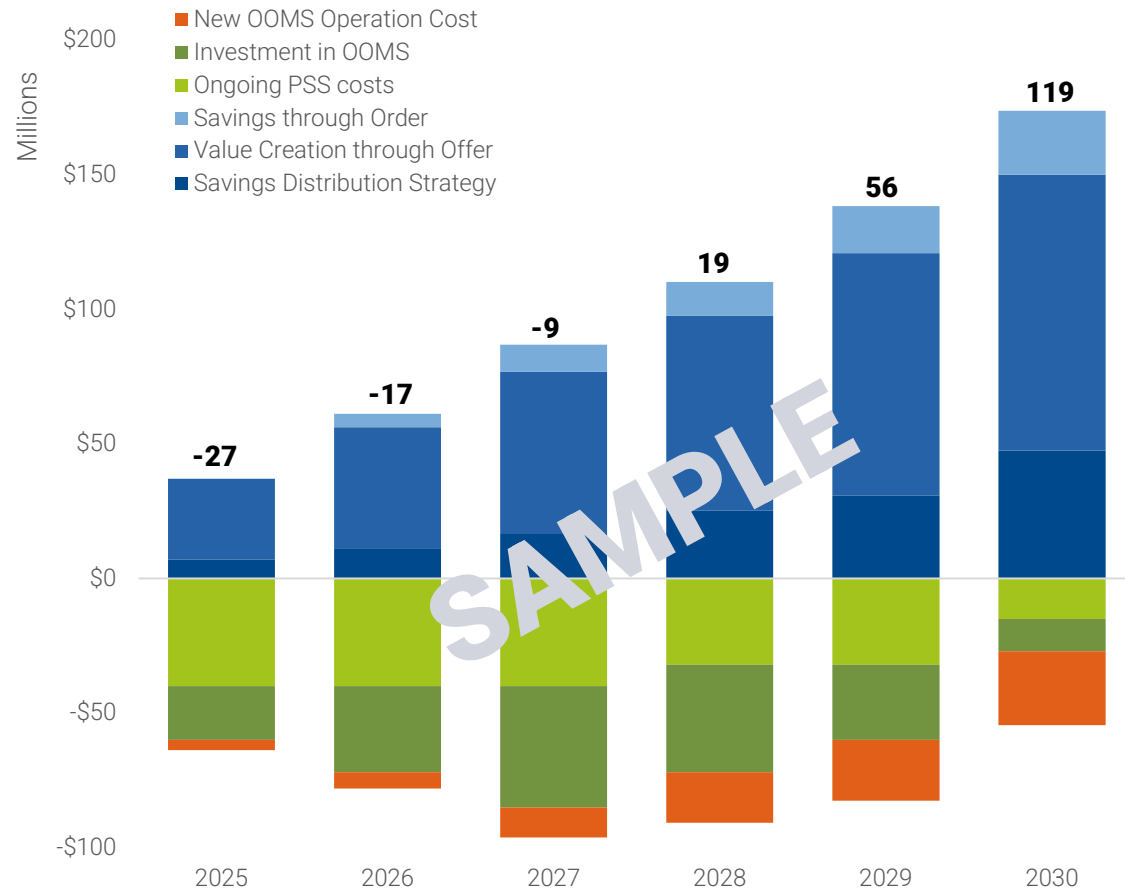
Architecture



Let's discuss: What do airlines want to achieve?

Business Value

Sample of an airline's value generation based on different scenarios.



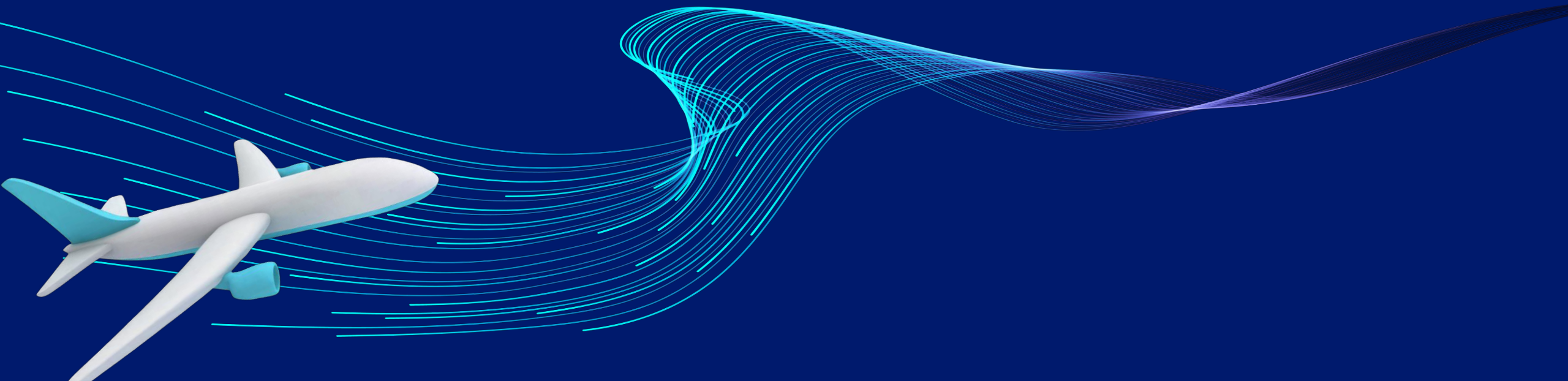
Various multiple factors are taken into account for each category

- ❖ Calculated as Offer/Order/Service Delivery/Financial management costs per PB, increasing through the years with OOMS advancements
- ❖ Implementation costs of new OOMS
- ❖ Cost of ongoing PSS contracts
- ❖ Order benefits consists of:
 - ❖ PSS and other IT
 - ❖ Revenue management
 - ❖ New offers (Revenue)
- ❖ Offer benefits consist of:
 - ❖ Additional revenue from new offer
 - ❖ Benefits from dynamic offers
 - ❖ Lower GDS costs
- ❖ Benefit of lower distribution costs with move to OO



William Cavendish

Building AI-Powered Airline Retailing
on a Proven Foundation





#1 NDC
global
enabler

70K+
total agencies

+146%

>50%
global NDC
transactions

Fast

Standardized deployment of NDC

80%+

adoption rate by
our customers

33bn
offers per
day

250+

direct connections to
agents and aggregators
globally

Compliant 24.1

ONE Order
foundation





Take control of your retailing journey

- Boost margin and revenue
- Retail your way, at scale with NDC as your foundation
- Move beyond legacy limitations
- Industry Standard Open-API power modularity



AI VIATOR

Accelya's AI intelligence layer delivering real ROI for airlines



OFFER



ORDER



SETTLE



DELIVER



Accelya NDC

accelya



THE AI INTELLIGENCE LAYER DELIVERING REAL ROI ACROSS THE AIRLINE JOURNEY

AI VIATOR

Built for action. Ready for now!



Increase
productivity



Drive
incremental
revenue



Reduce
onboarding
time

Up to
6%

Fare revenue
through
autonomous
dynamic
pricing

+85%

Faster onboarding of
merchandising rules

10%

Faster resolution
of order enquiries

92%

Accuracy
in cargo
capacity
forecasting

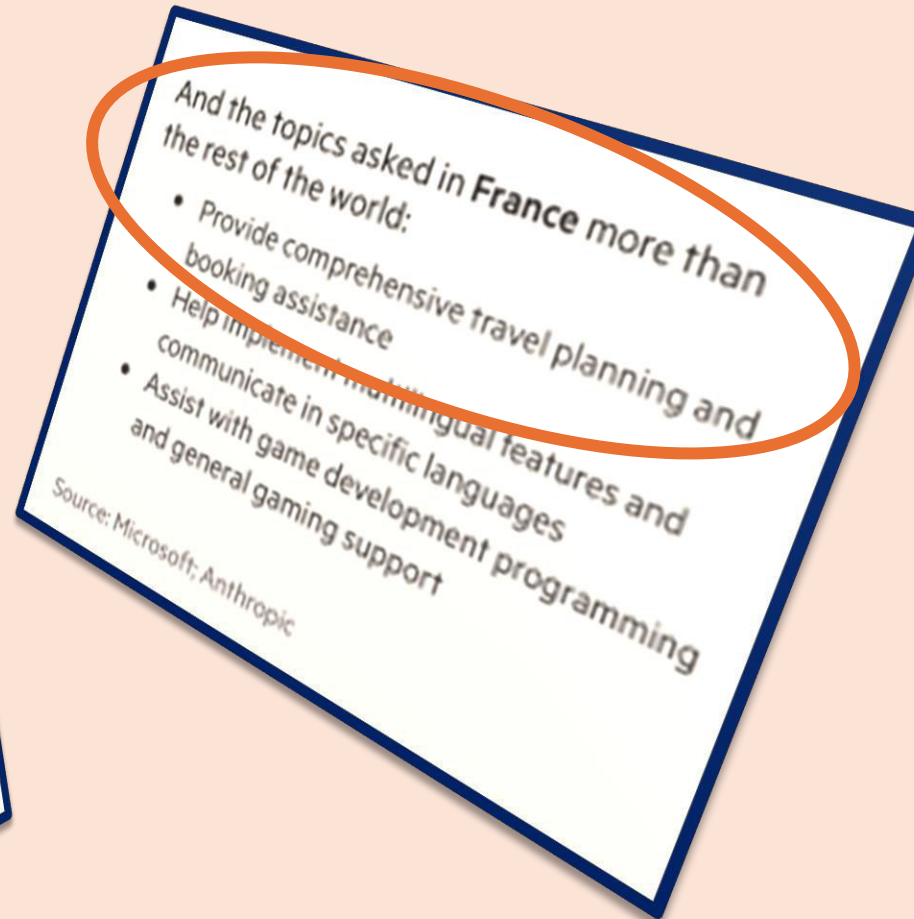
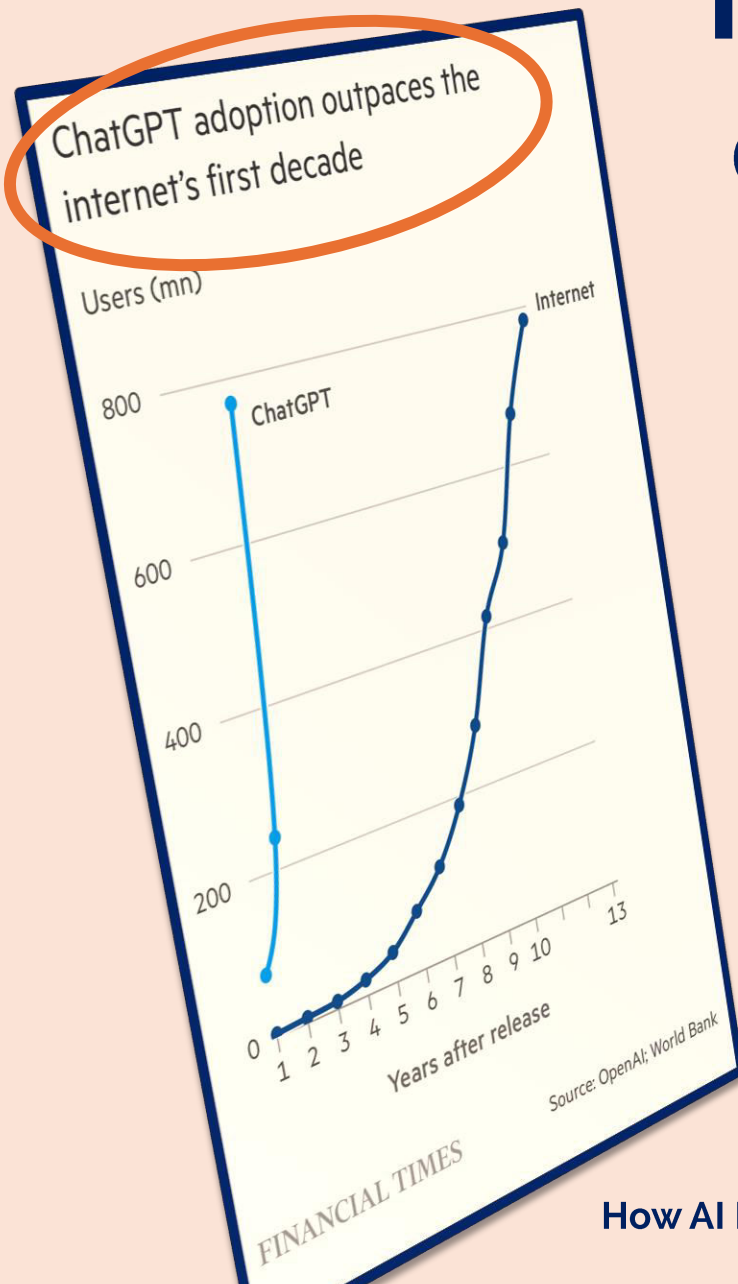
10%

Lower support costs
assisting complex
financial queries



accelya

This is your customer

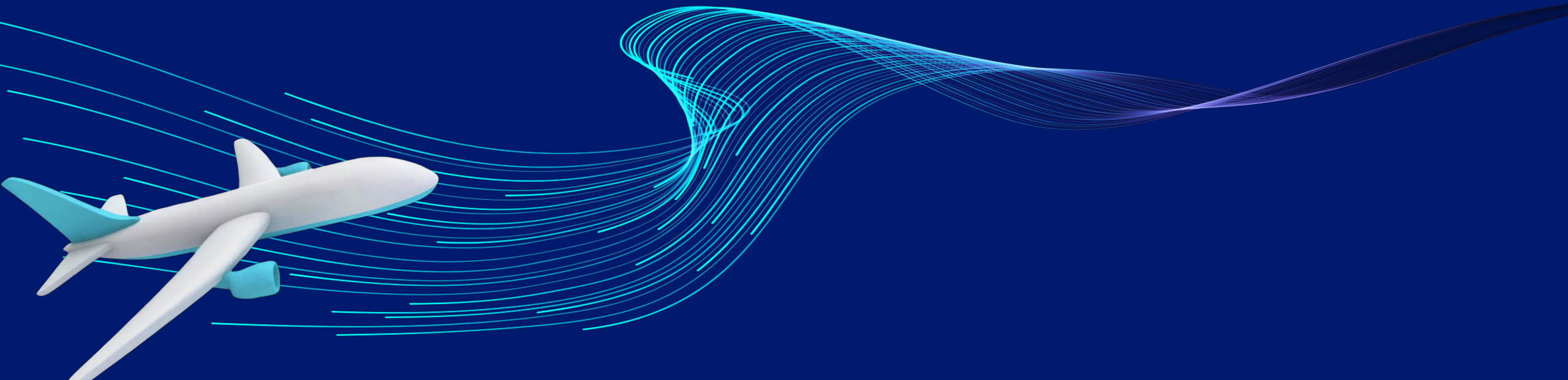


How AI Became our Personal Assistant
Financial Times Oct 25

30% of 2025
industry revenues

Robin Kanthareuben

Travel companies want to be
the Amazon of Travel





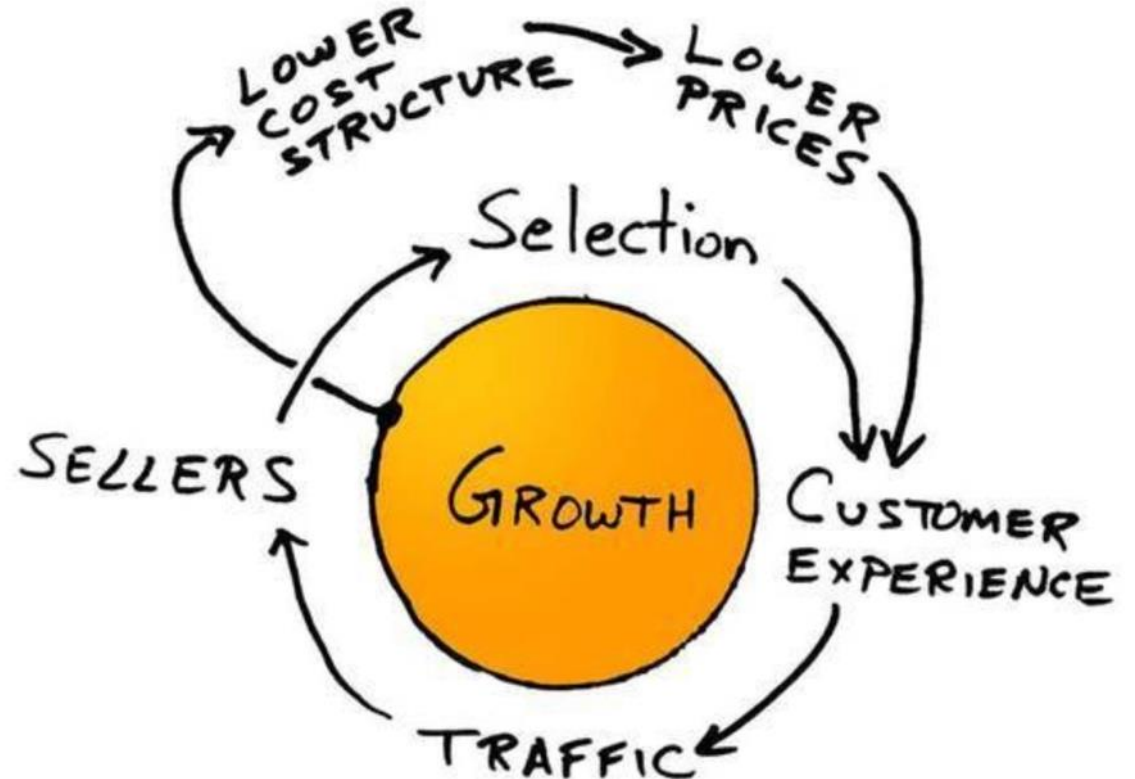
*We innovate by **starting with the customer** and working backwards. That becomes the touchstone for how we invent.*

Jeff Bezos, Amazon Founder

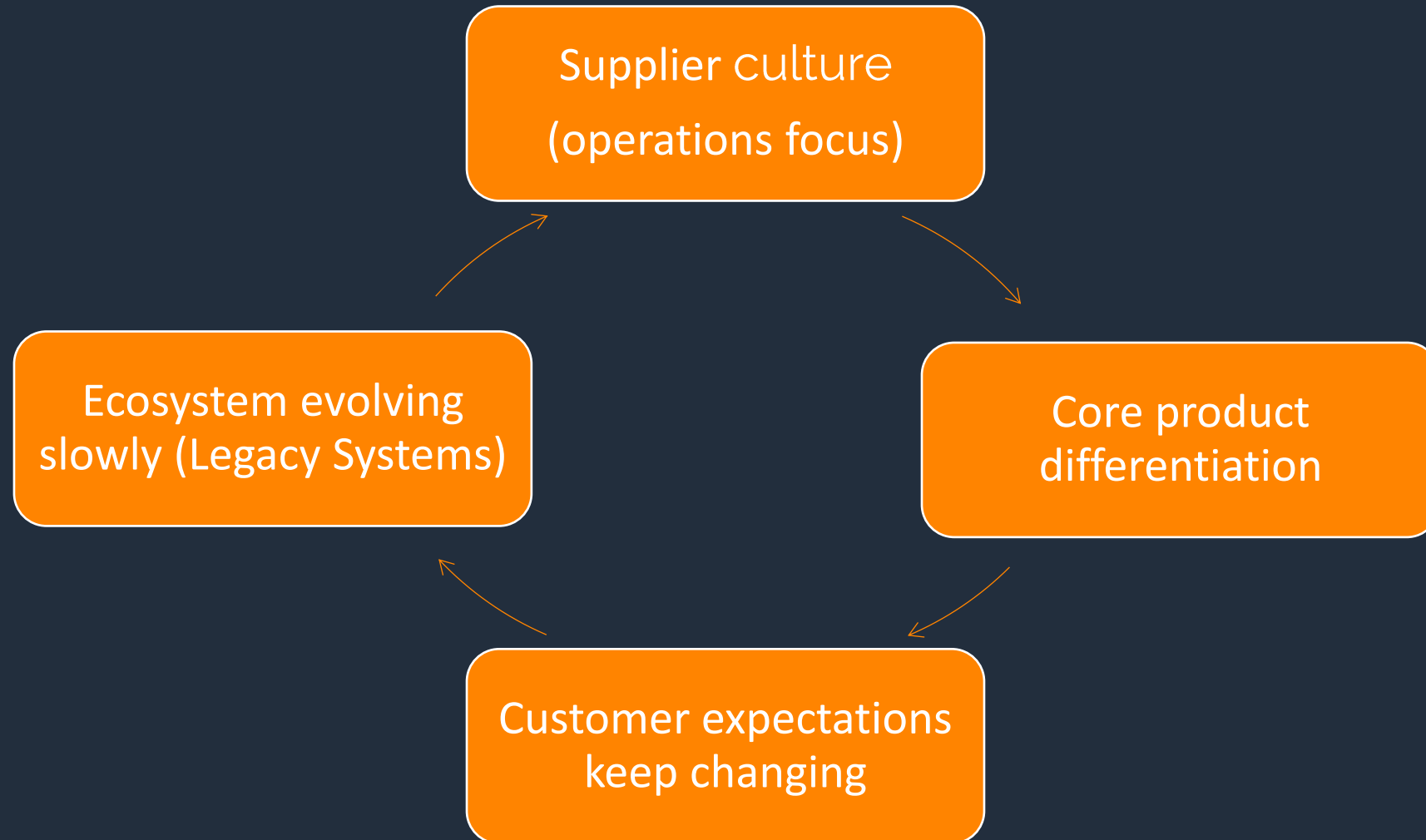
Retailing – a different angle from Amazon

Amazon Way - *focus on what never changes*: Selection, Convenience, Price

- **Experience**: Right product via the right channel at the right time
- **Selection** above and beyond the basic
- **Convenience**: One stop shop for what I need
- **Price**: while low price is important, the **right price**, right bundle, and balance of selection and convenience is equally important and can sway the customer (*Amazon Recommended offers*)



Why is Retailing so Elusive in Travel





Data Domain 1: Customer

Building unified customer profile so to offer real-time contextual engagements

Data Domain 2: Product Catalogue

Understand and **explain** what you are selling, what is its value, and what is the offer

Data Domain 3: Order

An accurate record of what got sold, at what price, to which customer, and when



A medium shot of Andy Jassy, CEO of Amazon, speaking. He is a middle-aged man with short, light brown hair, wearing a dark blue patterned blazer over a blue and white checkered button-down shirt. He is gesturing with his right hand, palm facing up. The background is dark with vertical light streaks.

“We like to say that
there is no compression
algorithm for **experience**.”

Andy Jassy, CEO
Amazon.com, Inc

AWS: The leading cloud

**Most proven
operational expertise**

19

years helping millions
of customers

**Global reach and
high availability**

114

Availability Zones spanning
36 geographic Regions

**Most functionality and
fastest pace of innovation**

200+

service offerings

**Improved total
cost of ownership**

151

price reductions since 2006

**Comprehensive
security and compliance**

300+

security services & features

**Largest community of
customers and partners**

140,000+

APN partners from more
than 200 countries and territories

Delivering the future of airline retailing

5-year Strategic Collaboration Agreement

accelya + aws

The Power of True Partnership



accelya

DELIVERING MODERN AIRLINE
RETAILING AT SCALE THROUGH
ACCELYA AND AMAZON WEB
SERVICES (AWS) CLOUD

aws



Scan to download!





Sign up to receive our news!

Thank you!
Join our
community of
airline retail
pioneers



accelya