

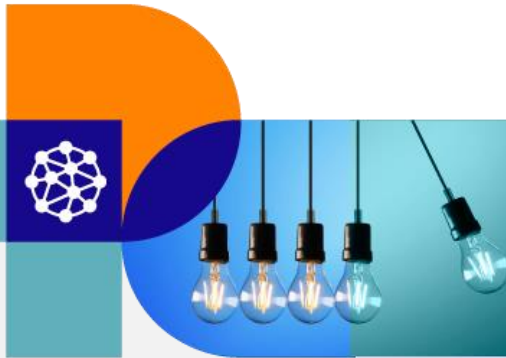


Airline Retailing Maximization

Modern Retailing: From NDC to OOSD

May 13, 2025

Swift. Seamless. Smart.



tpconnects.com

Introducing ourselves



Giuseppe Candela

VP- Global Sales
TPConnects Technologies



Kristiaan van Dijken

VP – Product Management (Airline)
TPConnects Technologies

Why are we here?

Advancing African Airline Retailing Together

- TPCConnects is a key technology provider for airlines in NDC and Airline Retailing
- We empower airlines to transition to future-ready, open technology ecosystems that can operate without a traditional airline PSS

*'Enabling airlines to take control of their journey towards **100% Offers and Orders**'*



How are we different?

The TPCConnects Advantage



We believe in partnerships



We make you a priority



We help you penetrate your key markets



NDC Pioneers: Leading the charge **since 2015**, continually upgrading versions



Intuitive, plug-and-play, **Aggregation** solutions for **Travel Sellers**



Powering **Modern Airline Retailing** and Accelerating **Offers & Orders** transformation for the **Airline Industry**

2015 onwards



2015 onwards



2018



2019/2023 onwards



2021



TPConnects Today: Our People, Our Expertise, Our Impact



Global HQ in Dubai

160+ product and
tech experts,
20+ nationalities



NDC

In-depth Airline
Retailing experience



SWIFT

Deployment in few
weeks from contracting



> 2B USD

Growing yearly
bookings volume

Agenda

1

**An Intro to
Modern Airline
Retailing**

2

**Distribution
Survey
– Key Learnings**

3

**Introducing TPC's
Astra Platform**

4

**Unconstrained
Retailing - From
NDC to OOSD**

5

**TPC as an
Aggregator
partner**

01

An introduction to Modern Airline Retailing

Evolution of Airline Retailing



GDS / EDIFACT

Digital Commerce

NDC

Offers & Orders

What is Modern Airline Retailing?

- Giving Airlines full control from product definition, offer generation to channel distribution

Unique Capabilities:

- Make the right offer at the right price to the right customer
- Distribute Products and content that cannot be sold on legacy channels
- Unlock revenue potential from ancillary products (air and non-air)
- Fast time to market (less reliance on static fare filing and transition to dynamic offer generation)
- Unlock retailing scenarios never seen in the industry before!

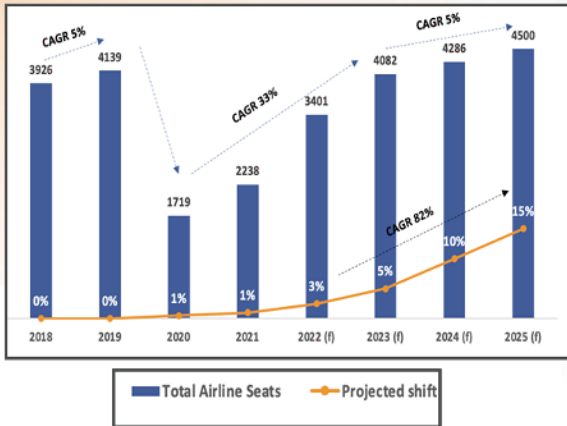
- **NDC is an enabling factor for the distribution of dynamic content (incl. ancillaries)**
- **Offer and Order Management System will remove the restrictions of traditional PSS**

NDC Opportunity

5.85B



Seats sold 2024



NDC adoption
ahead of
projection

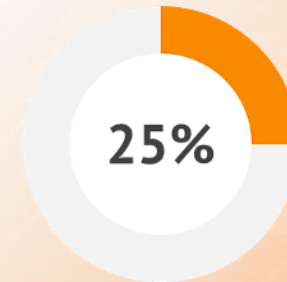
Some airlines with
plan of NDC 100%
By 2030

1.46B



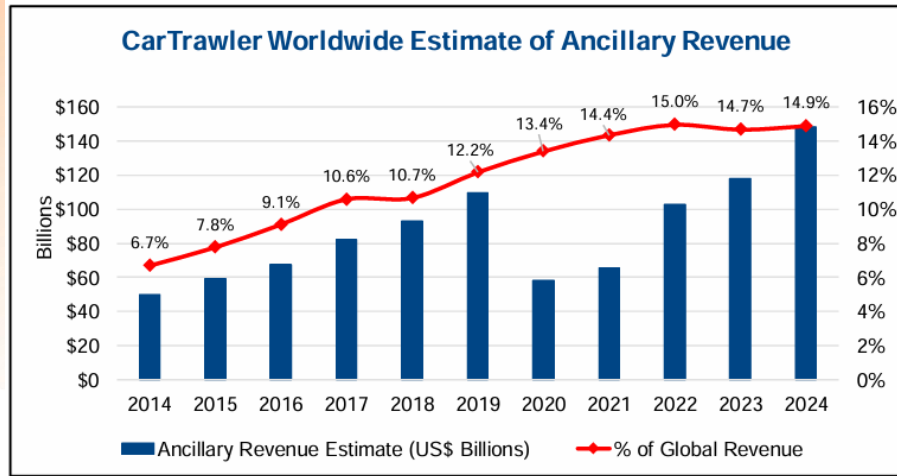
NDC Seats - 2024

NDC share 2024



Airline Ancillary Revenue Skyrockets to \$148.4 Billion Worldwide for 2024

2024 Total Revenue



Ancillaries Opportunity



Baggage



Seats



Meals



Lounge



In-flight
Entertainment

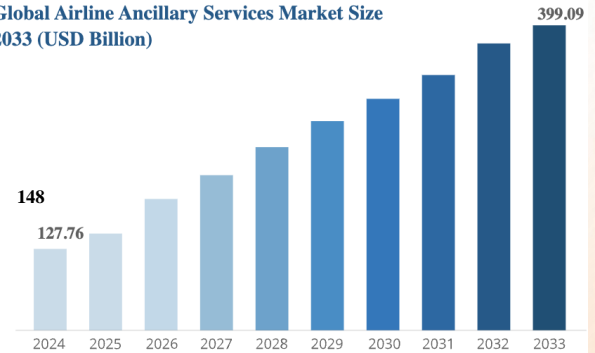


Travel
Insurance

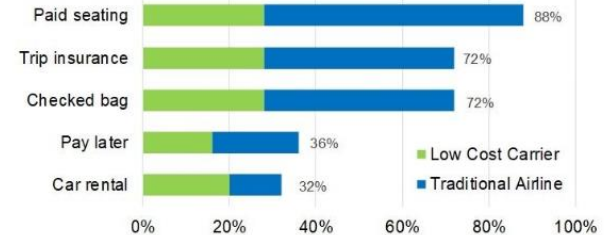


Ground
Transportation

Global Airline Ancillary Services Market Size
2033 (USD Billion)



Booking Path Analysis - Top 5 A la Carte Items
Offered when selecting the lowest fare



Analysis performed February 2025 of 25 key airlines (17 traditional airlines and 8 low cost carriers) based upon each carrier's top passenger traffic market.
2025 Almanac of Airline Retail, IdeaWorksCompany.com

There is an opportunity to foster sales of ancillary in NDC channel





02





AFRAA and TPC Distribution Survey 2025

Key Learnings

70 responses from over 25 airlines

Survey respondents: *70 responses from over 25 airlines*

Passengers Carried (Annually)			
			
Less than 0.5M PAX	0.5 – 2.0M PAX	2.0 – 5.0M PAX	More than 5M PAX
44.0%	36.0%	10.0%	10.0%

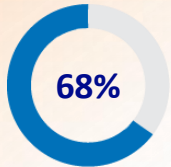
Fleet size			
			
1-5 Aircraft	6-15 Aircraft	16-30 Aircraft	More than 30 aircraft
40.0%	38.5%	8.5%	13.0%

Distribution via NDC: *Objectives and Investment Priorities*

Top Objectives



Reducing Distribution Costs



Increasing Direct Sales



Improving Customer Experience

Investment Priorities



NDC implementation and direct distribution



Modernizing PSS infrastructure for offer/order management



Dynamic pricing and personalization capabilities

Survey Question: *Do you have an NDC API Gateway?*

		Airline Size (PAX)			
	Survey	S	S-M	M	L
No API Gateway	46%	20%	17%	3%	6%
Planning to Implement	24%	12%	6%	3%	3%
Implementing	21%	3%	9%	3%	6%
NDC Enabled	9%	9%			

Distribution via NDC: *Your urgency to transition to NDC?*

		Airline Size (PAX)			
	Survey	S	S-M	M	L
No API Gateway	46%	20%	17%	3%	6%
Planning to Implement	24%	12%	6%	3%	3%

Planned Timeline for Implementation

1 Year	2-3 Years	4-5 Years	No Plans
18%	28%	18%	36%

Distribution via NDC: *False Myths against adoption*



Cost pressures: GDS/intermediary fees impact margins.



Technical barriers: Limited IT resources and integration issues.



Market resistance: Agents unfamiliar with NDC; regulatory complexity.

Distribution via NDC: *Roadmap & Recommendation*



\$tart now! Pilot NDC on selected markets and exploit mechanism for content differentiation.



Engage your staff: Simple upskill towards workforce digitalization



Phased NDC adoption: Grow internal expertise and gain competitive advantage

Distribution Survey 2025: *Key points and takeaways*

- African Airlines **need to catch up in the NDC Adoption** as they are falling behind compared to other parts of the world (90% not ready for NDC yet)
- **Reduction of Distribution Cost must** be a priority
- NDC is not necessarily complex. It can be deployed in a few weeks, support scalable adoption, and drive **additional revenues**

03

Introducing TPC's Astra Platform





Astra USPs

- Frictionless agency onboarding (IATA, non-IATA, Corporates, Government entities)
- Significantly lower your distribution cost
- Smart Sales and Servicing capabilities
- Airline Branding and Customization of the Portal
- Sell your ancillary products and possibly third-party content integration

tpc Order ID/Order Reference: [Search] Check Ticket/ETD Status: [Search]

Sort: Price Time Duration Stops

Dubai to Bahrain

TP509
DXB 10:50 → BAH 11:10
Non-stop

View details

10:50 DXB → 11:10 BAH

MOVIES, programs, music and more
Immerse yourself in hours of blockbuster movies, programs, documentaries and more from a personal Audio-Definition television screen

- 70 cm seat pitch
- Fast web browsing
- Power & USB outlets
- Seatback on-demand video
- Light meal provided
- Alcohol & beverages provided

SELECT FARES	ECONOMY LIGHT S	ECONOMY SMART S	ECONOMY FLEX S
Carry on bag	Free up to 4kg	Free up to 4kg	Free up to 4kg
Checked Bag	1 Free 23KG/PC	2 Free 23KG/PC	3 Free 23KG/PC
Fuel/stop miles	90%	75%	100%
Date Changes	AED 459	AED 367	AED 220
Cancellation	AED 771	AED 404	AED 312
Visa Services	Yes	Yes	Yes
Upgrade Eligibility	Yes	Yes	Yes

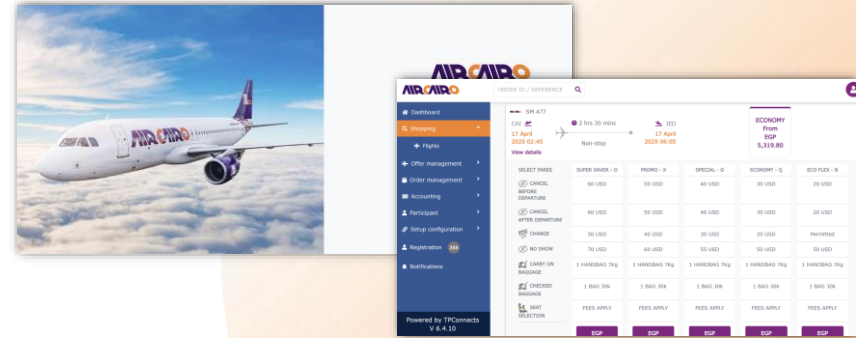
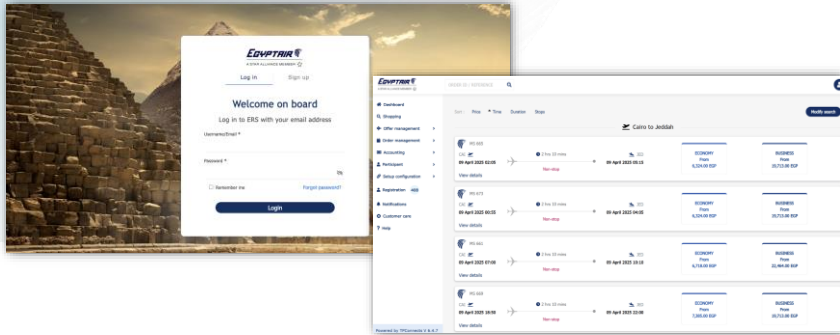
BHD 51,800 BHD 48,800 BHD 40,300

Some benefits may not apply if you're travelling with our partner airlines.

Astra is powering AFRAA members today



NDC API Gateway | B2B Travel Seller Portal | Observing continuous growth



20+ API connections to Travel Sellers / 3000+ Agencies onboarded on the portals

Our Offering and Vision



Powerful
NDC API Gateway
(v18.2, 21.3 → 24.4)

Best of Breed
Travel Agency
Desktop Solutions

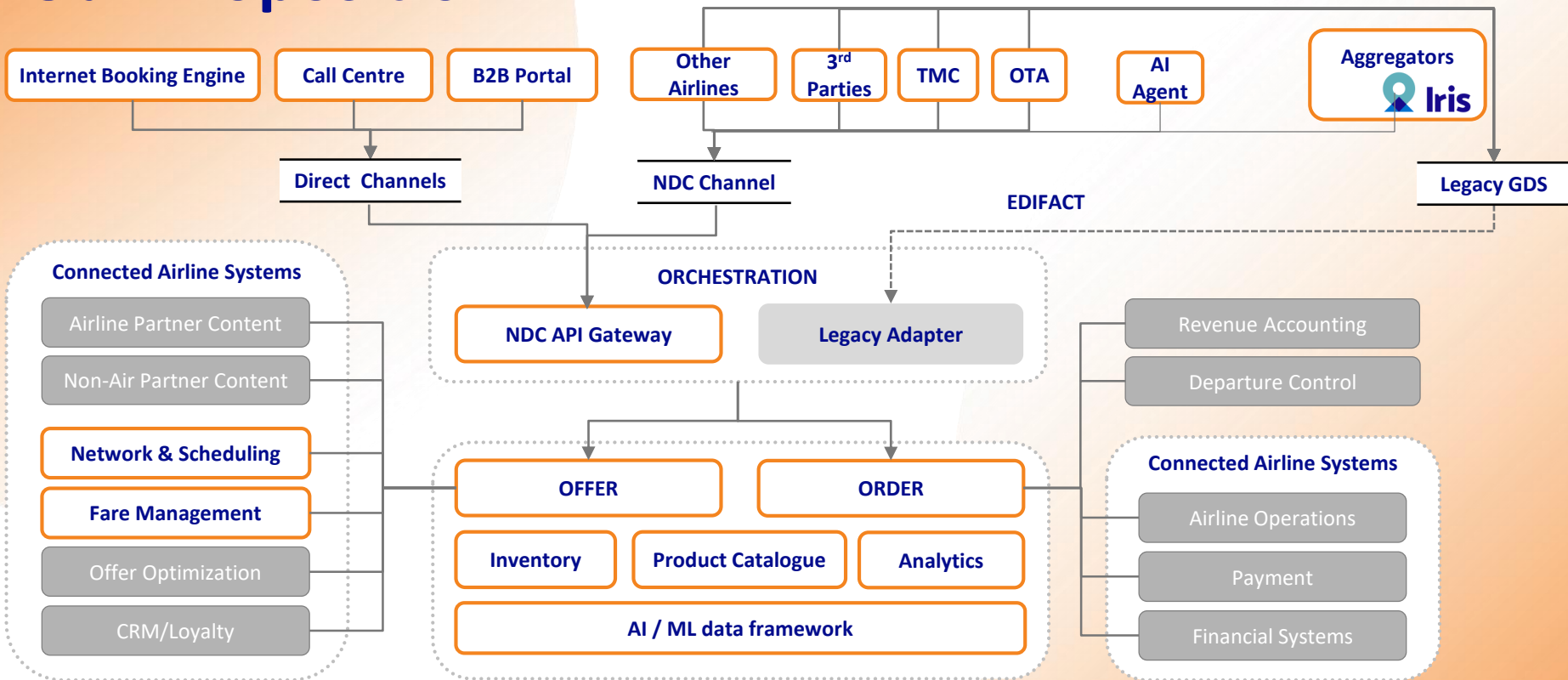
Maximizing
Airline Retailing
Opportunities

B2C Capable

Paving the way to
OOSD transformation



Our Proposition



04

Unconstrained Retailing - from NDC to OOSD

Unconstrained Retailing: *Key considerations*

- Reduce / remove the dependency on the traditional PSS in a world controlled through Offers and Orders allowing airlines to sell any product
- Airlines can define, control and customize products they wish to provide to their customer base or to maximize revenue

The Technology Change: *Also a significant Business Change*

The world of Traditional PSS (PNR, TKT, EMD)

- | | | | |
|--|--|--|---|
| <ul style="list-style-type: none"> • Manage Schedules • Manage Fares | <ul style="list-style-type: none"> • Availability/ Inventory • Pricing | <ul style="list-style-type: none"> • PNR Management • PNL Management | <ul style="list-style-type: none"> • Revenue Accounting • Departure Control |
|--|--|--|---|

Unconstrained Airline Retailing (Offers and Orders)

Product Management

- Air, Air-related and Non-Air
- Other airlines
- Stock-keeper (Inventory)

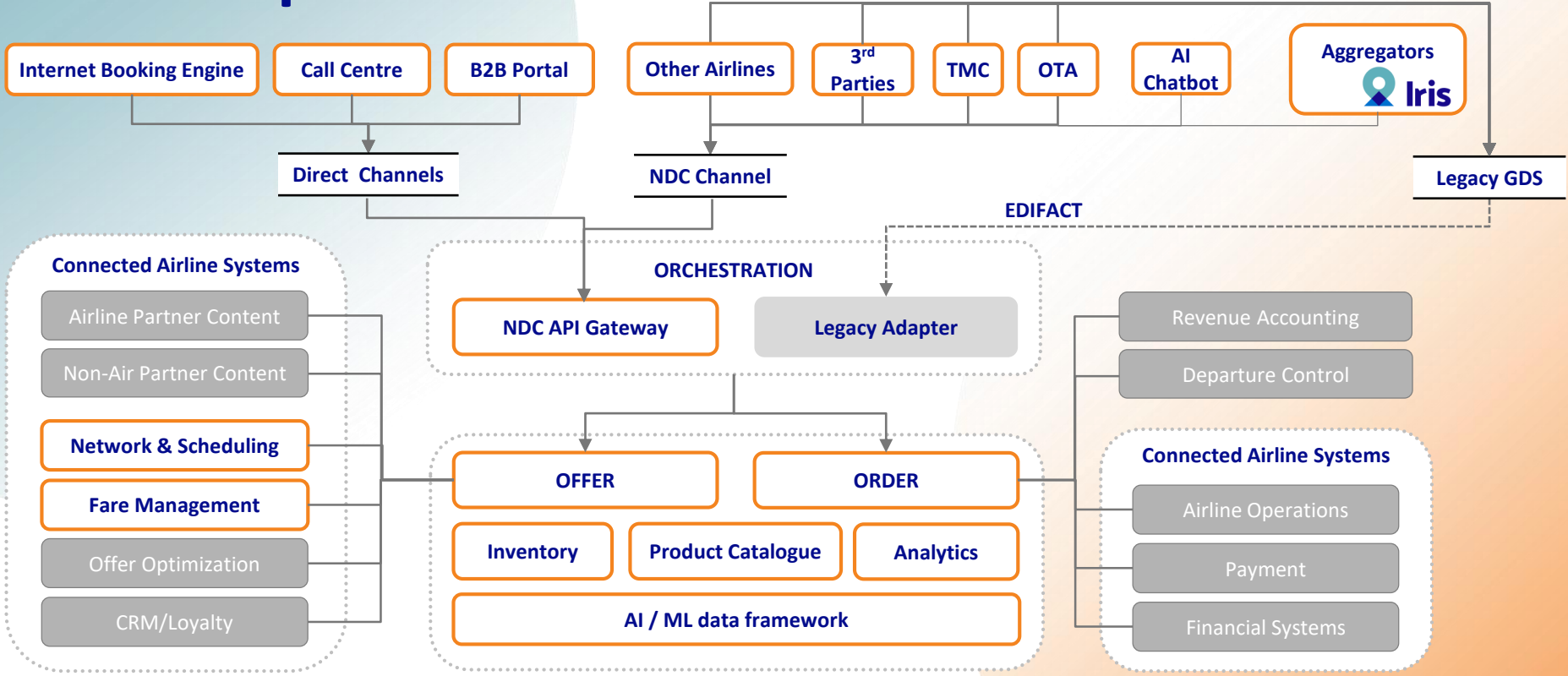
Offer Management

- Dynamic Offer Generation

Order Management

- | | |
|---|--|
| <ul style="list-style-type: none"> • Order Creation | → Settle / Financial Accounting |
| <ul style="list-style-type: none"> • Order Servicing | → Deliver / Fulfilment |

Our Proposition



Our Proposition

Internet Booking Engine

Call Center

Direct

Connected Airline Systems

Airline Partner Content

Non-Air Partner Content

Network & Scheduling

Fare Management

Offer Optimization

CRM/Loyalty

PRICE

Price Type

RBD Price Class

Economy

#	Price Class	No of Seats	Price Mapping	Adult		Child		Infant	
				Base Price	Total Tax	Base Price	Total Tax	Base Price	Total Tax
<input type="checkbox"/>	Economy Light	<input type="text"/>	Add Price	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Economy Smart	<input type="text"/>	Add Price	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Economy Flex	<input type="text"/>	Add Price	0.00	0.00	0.00	0.00	0.00	0.00
<input checked="" type="checkbox"/>	Light	2	Add Price	100.00	42.64	100.00	42.64	100.00	42.64
<input checked="" type="checkbox"/>	Value	2	Add Price	160.00	42.64	160.00	42.64	160.00	42.64
<input checked="" type="checkbox"/>	Comfort	4	Add Price	220.00	42.64	220.00	42.64	220.00	42.64
<input checked="" type="checkbox"/>	Flex	6	Add Price	270.00	42.64	270.00	42.64	270.00	42.64

Our Proposition

Internet Booking Engine

Call Center

Direct

Connected Airline Systems

Airline Partner Content

Non-Air Partner Content

Network & Scheduling

Fare Management































Offer Optimization

CRM/Loyalty

Product Categories

+ Add New

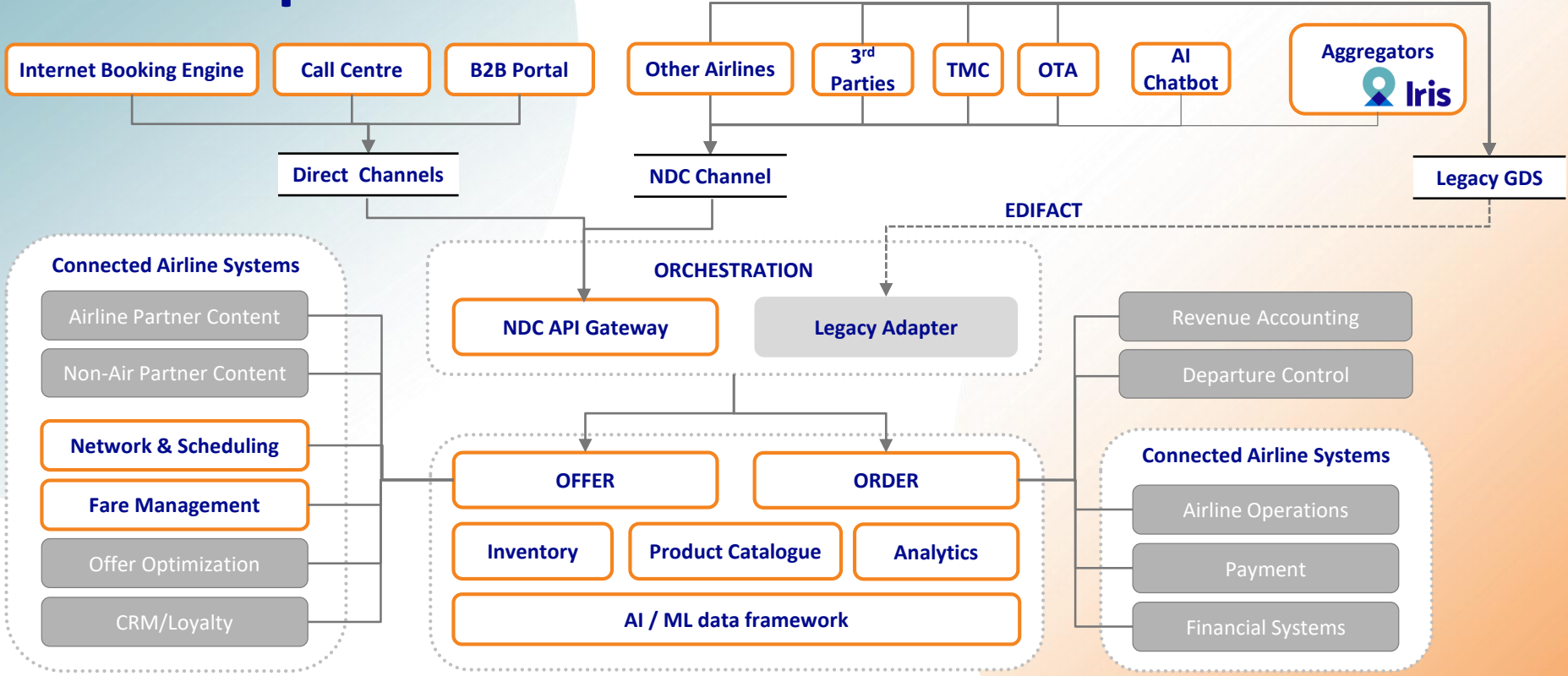
Show 10 entries Search:

Image	Name	Code	Product Type	Description	Action
	5 KG Excess Baggage	13EC5KEB	Checked Baggage	5 KG Excess Baggage	 
	Breakfast	04B0VU	Breakfast	Vegetable upma	 
	Checked Baggage	13ECSB	Checked Baggage	Special Baggage	 
	Extra Legroom	YEL	Seat	Extra Legroom	 
	Full Course Meal	1D4FCM	Meal	Full Course Meal	 
	Kathi Roll Non-Veg	04B0KRV	Breakfast	Kathi Roll Non-Veg	 
	Lounge Access	1B58LA	Lounge	Lounge Access	 
	Meet and Greet	00C8MAG	Servicing	Meet and Greet	 
	Preferred Seat	YPS	Seat	Preferred seats - Economy	 
	Preferred Seat	JPS	Seat	Preferred seats - Business	 

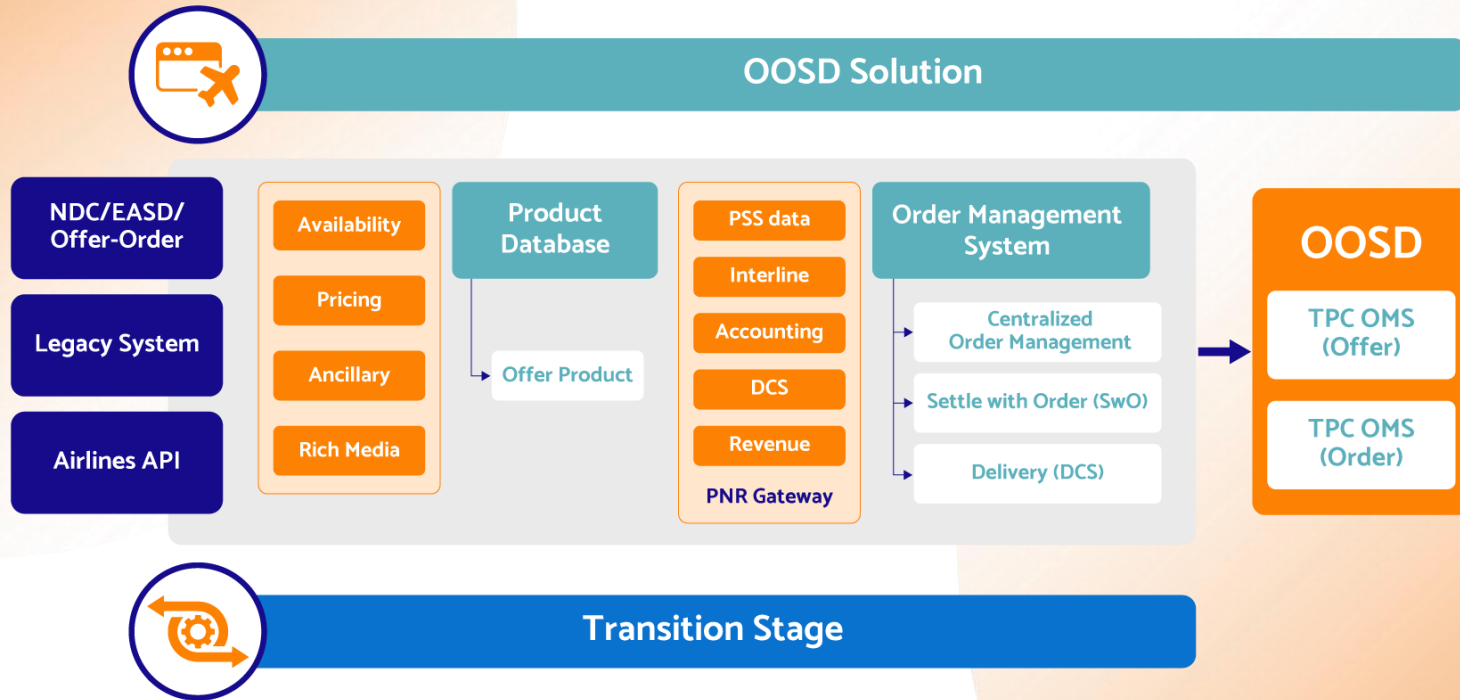
Standard Seat 100 90 100

Showing 1 to 5 of 5 entries Previous 1 Next

Our Proposition



Transforming from Legacy PSS



OOSD Technology Providers

Product Management	Offer Management	Order Management	Financial Management	Delivery Management
✓	✓	✓	✓	✓
	✓	✓	✓	✓
✓	✓	✓	Partnerships	Partnerships
		✓	✓	
		✓		
✓				
				✓

Modular: Going forward, Airlines can

– choose a technology eco-system +
from multiple vendors

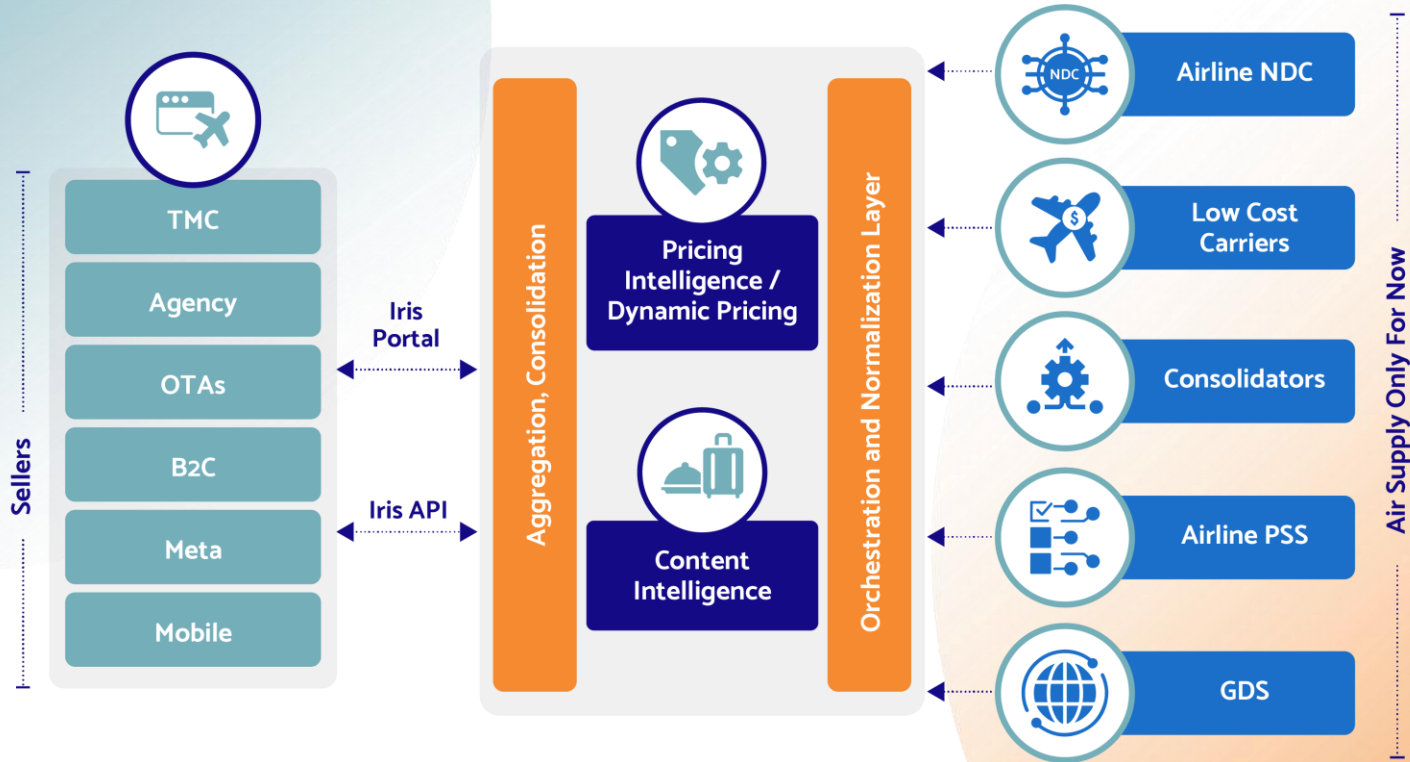
- Inter-operability
- Standards
- Best of Breed
- Cost-Effective

TPConnects

05

TPC as your Aggregator Partner

TPC IRIS Aggregation platform Architecture



Iris Airline Content

All your content and your incentives

>>Iris Supplier Capability Matrix



NDC

AIRFRANCE



BRITISH AIRWAYS

Lufthansa



Austrian



FINNAIR



discover. airlines



LCC

RYANAIR

FlySafair

Jetstar



GDS

Sabre

AMADEUS

TRAVELPORT

And more to come....

TPC Iris Agency network

Main Markets:

- Asia-Pacific
- India Subcontinent
- Middle East
- Europe
- Africa
- North America

Growing number of agencies interested in consuming NDC



Wrap-up

Wrap-up

- **TPC is your partner to lower your distribution costs, leveraging the NDC Standard**
- **ASTRA-branded B2B Portal is the quick-win to disintermediate with your Travel sellers**
- **The NDC API Gateway will allow broader reach and scale to aggregators (including TPC's IRIS) and OTAs in the market**





Download our White Paper
to have more insights on the survey

