Implementation Forum #3
Madrid
An overview

24- 25 September 2019
This meeting is being conducted in compliance with the Provisions for the Conduct of the IATA Traffic Conferences. Pursuant thereto, this meeting will not discuss or take action to develop fares or charges, nor will it discuss or take action on remuneration levels of any intermediaries engaged in the sale of passenger air transportation. The meeting also has no authority to discuss or reach agreement on the allocation of markets, the division or sharing of traffic or revenues, or the number of flights or capacity to be offered in any market. Delegates are cautioned that any discussion regarding such matters, or concerning any other competitively sensitive topics outside the scope of the agenda, either on the floor or off, is strictly prohibited.

The foregoing applies equally to email discussions, instant messaging and social media discussions whether directed to announced participants or other parties not present in the meeting. Participants are reminded that live streaming of this meeting to parties not present in person is not permitted except as indicated by and with the express permission and knowledge of the Chairperson and IATA and only in the event that specific participation on a given item from a party not present in person is required. Unauthorized recording of the meeting is prohibited.
1. Setting the scene

2. NDC for Managed Travel
   - Implementation priorities for TMCs Blue Cube Travel
   - TMC implementations – airline insights IB, AY, LHG, UA
   - TMC implementations – an aggregator experience Verteil Technologies

3. Identification of entities in an NDC implementation IATA

4. Features in the standard IATA
   - First, a word about the Implementation Guide
   - Performance – a replay
   - Features supporting Offer Management

5. An end to end TMC NDC implementation – Fello Travel, Air Gateway, Midoco

6. Servicing – Airline Implementations
   - What airlines support today UA, AY, LHG, AA, IB
25 September
9:30 – 16:00

1. Airline Sandboxes Duffel

2. Features in the standard supporting Order Management IATA

3. Experiences implementing Order Management
   - for NDC InteRes
   - ‘Order’ IDs and Statuses - how are you using them in your implementation IATA
   - ONE Order IATA

4. A look at elements marked for deprecation - IATA

5. Specific pain points brought by implementers

Day ends 4pm
Implementation Forum Madrid

65 participants

16 Leaderboard airlines

10 TMCs (First time)

- Airline, 21, 33%
- IT Provider, 18, 28%
- Aggregator, 10, 16%
- TMC, 13, 20%
- Other Seller/Agent, 2, 3%
Implementation Forum Madrid

TMCs: Gave insight into their world, what’s important to them

Airlines: shared their servicing roadmaps and experience with TMCs

Aggregators: demonstrated how they are filling airline gaps

Startups: presentations and demos
In the room

NDC Journey

- We are in the project setup phase
- **WE ARE IN PRODUCTION WITH LIVE TRANSACTIONS**
- We are preparing to go live
- We are in the vendor-selection phase
- We are not live, only here to learn

Airline, 21, 33%

IT Provider, 18, 28%

TMC, 13, 20%

Aggregator, 10, 16%

Other Seller/Agent, 2, 3%
Presentations delivered by

- Blue Cube Travel
- Leaderboard airlines: Iberia, Finnair, Lufthansa Group, United Airlines, American Airlines,
- Verteil Technologies
- Fello Travel, Air Gateway, Midoco
- Duffel
- InteRES
- IATA
TMC’s this week
What’s important to TMCs

Airline interaction
• Easy onboarding processes
• API Operational support
• Strong account management

Capabilities
• Relevant to managed travel processes
• Better than today
• Certification @scale

Consistent, complete, data in the schema to support automation and decision making
• Data formats
• Description of products
• Machine-readable rules
• Consistent approach in implementation of schema

Interfaces
• Showing the value of the product in the OBT
• Seamless feeds for downstream processes and co-existing with GDS bookings

Workflows
• Answering the question asked
• Consistent implementation from airline to airline
• That support automation and transparency

Other Challenges
• PSD2
• Infosec (GDPR)
• Client Expectations
• Time Constraints
• Lack of accurate info from Account Mgrs
Your Capabilities
A c c i l l a r i e s

A n c i l l a r i e s  I m p l e m e n t e d

C a r  S e r v i c e s
D u t y  F r e e
T r a v e l  I n s u r a n c e
W i - F i
S p e c i a l  S e r v i c e s
C h a n g e  F e e
L o u n g e  A c c e s s
M e a l s
B a g g a g e
S e a t s

R i c h  M e d i a  -  C u r r e n t  F o r u m

Y e s ,  1 7 ,  4 6 %
N o ,  2 0 ,  5 4 %

S o u r c e :  I m p l e m e n t a t i o n  F o r u m  P a r t i c i p a n t s
N D C  D e p l o y m e n t  Q u e s t i o n n a i r e  2 0 1 8 - 2 0 1 9
Flight and ancillaries

By common ancillaries

With seat selection

Based on calendar

For lowest fare or x days

Based on Pax Type

By multicity OpenJaw

Offers based on private fares

Localised offers

Offer Rules described

Affinity shopping

Shop including non-air ancillaries

Shop for groups (e.g., tour operator cases)

Shop with airline loyalty program

Shop for airline specific products

Shop by other ancillaries (insurance, lounge pass etc.)

Airline dynamically built or personalized offers

Bundled offers (pick 1 of 3)

Airline offers with rich content

Airline offers with discounted benefits, promo

Shop for groups (e.g., tour operator cases)

Shop with airline loyalty program

Shop for airline specific products

Shop by other ancillaries (insurance, lounge pass etc.)

Offer Rules described

Localised offers

Offers based on private fares

By multicity OpenJaw

Based on Pax Type

For lowest fare or x days

Based on calendar

With seat selection

By common ancillaries

Flight and ancillaries

Source: Implementation Forum Participants
NDC Deployment Questionnaire 2019
<table>
<thead>
<tr>
<th>Capabilities</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order creation</td>
<td>25</td>
</tr>
<tr>
<td>Order creation groups</td>
<td>20</td>
</tr>
<tr>
<td>Order change groups</td>
<td>15</td>
</tr>
<tr>
<td>Order history implementation</td>
<td>10</td>
</tr>
<tr>
<td>Order creation groups</td>
<td>10</td>
</tr>
<tr>
<td>Implementation of 3DS</td>
<td>10</td>
</tr>
<tr>
<td>Deferred payment (Order on hold)</td>
<td>15</td>
</tr>
<tr>
<td>Pay with credit card</td>
<td>25</td>
</tr>
<tr>
<td>Pay with Cash (BSP, ARC etc.)</td>
<td>20</td>
</tr>
<tr>
<td>Pay with Debit card</td>
<td>15</td>
</tr>
<tr>
<td>Pay with airline loyalty</td>
<td>10</td>
</tr>
<tr>
<td>Pay with mixed methods</td>
<td>10</td>
</tr>
<tr>
<td>Pay with alternative methods</td>
<td>5</td>
</tr>
<tr>
<td>Changes resulting in cancellation WITHOUT refund</td>
<td>15</td>
</tr>
<tr>
<td>Changes resulting in cancellation WITH refund</td>
<td>15</td>
</tr>
<tr>
<td>Changes initiated by airline with notification</td>
<td>10</td>
</tr>
<tr>
<td>Changes initiated by customer (seat selection)</td>
<td>10</td>
</tr>
<tr>
<td>Changes initiated by customer (name correction)</td>
<td>5</td>
</tr>
<tr>
<td>Changes initiated by customer - remove pax (multipax order)</td>
<td>5</td>
</tr>
<tr>
<td>Changes Initiated by customer (itinerary, contact, upgrade, add ancillary etc)</td>
<td>15</td>
</tr>
<tr>
<td>Retrieve an Order</td>
<td>10</td>
</tr>
<tr>
<td>Cancel an Order</td>
<td>10</td>
</tr>
<tr>
<td>Implement Cryptocurrencies</td>
<td>5</td>
</tr>
<tr>
<td>Pay with alternative methods</td>
<td>5</td>
</tr>
<tr>
<td>Pay with mixed methods</td>
<td>5</td>
</tr>
<tr>
<td>Pay with Debit card</td>
<td>5</td>
</tr>
<tr>
<td>Pay with airline loyalty</td>
<td>5</td>
</tr>
<tr>
<td>Pay with mixed methods</td>
<td>5</td>
</tr>
</tbody>
</table>
Shopping @scale Capabilities

- Offer Rules described
- Localised offers
- Offers based on private fares
- By multicity OpenJaw
- Based on Pax Type
- For lowest fare or x days
- Based on calendar
- With seat selection
- By common ancillaries
- Shop by Flight and ancillaries

Source: Implementation Forum Participants
NDC Deployment Questionnaire 2019
Shopping enhanced capabilities

- NDC Interline shopping
- Airline offers with discounted benefits, promo
- Airline offers with rich content
- Bundled offers (pick 1 of 3)
- Airline dynamically built or personalized offers
- Affinity shopping
- Shop including non-air ancillaries
- Shop for groups (eg tour operator cases)
- Shop with airline loyalty program
- Shop for airline specific products
- Shop by other ancillaries (insurance, lounge pass etc.)

Source: Implementation Forum Participants
NDC Deployment Questionnaire 2019
Order Service Pay Capabilities

Source: Implementation Forum Participants
NDC Deployment Questionnaire 2019
Order Service Pay Enhanced Capabilities

- Implement Cryptocurrencies
- Pay with IATA Easy Pay
- Pay with real time bank transfer
- Pay with alternative methods
- Pay with mixed methods
- Pay with airline loyalty
- Pay with Debit card
- Order History implementation
- Order change groups
- Order creation groups

Source: Implementation Forum Participants
NDC Deployment Questionnaire 2019
Some takeaways
Some takeaways

**Mindset shifts:** needed on both sides, airlines and TMCs

**A common language:** key to getting through the discussions

**Identifying players:** achieving commonality is a challenge

**TMC requirements:** are different airlines need to consider this

**Automated servicing:** key to adoption

**The master order:** accepting that each player owns his own order

**Aggregators are filling gaps:** by providing tools

**Workflows:** implement based on the Implementation Guidance
Some takeaways

1. NDC is just one of many channels and processes
2. Airline to think about how the offer is being displayed in the TMCs display – TMCs want to see the value and context of the offer
3. Taxonomy enhancements will help in describing the product in the display
4. Offer *conditions* instead of Offer *Rules* - terminology change for constructive discussion 😊
5. Airlines, return complete offer *conditions (rules)* to the agent
6. SME TMCs – getting to understand the technology/standard capabilities
7. The client is a joint client; direct interaction often reduces the value/confidence in the TMC to the traveler
Some takeaways

1. Having automated servicing will increase agent confidence in NDC
2. Ongoing work needed to unify the industry around identifying parties in a transaction – some stakeholders don’t see why they need to pass their IDs in the schema
3. Airlines, make your sandbox useful for your partners to prepare to launch
4. Be aware of TMC context (approval processes) when setting time limits
5. Attention to respond to qualifiers in the RQ with relevant offers. Note too that TMCs have varying processes – some want all offers, some only want offers with corporate deals
6. Airlines, strengthen account managers’ NDC knowledge
Delegate views on what was valuable

- Networking and time to chat - Showcasing of real-world implementations (e.g. Fello + AirGateway + midoco)

Very interactive forum. Very interesting discussion on Seller Order / Aggregator Order / Airline Order Servicing being zoom on is important and involuntary changes: we need to ensure proper communication to seller too.

Better understanding of TA/customer needs as applied to NDC responses. Industry-wide understanding of the progress in various aspects of implementation; Opportunity to communicate with OA colleagues including topics outside IATA scope (i.e. organisational structures)

Feedback from the TMCs and insights from the Aggregators/IT providers.

Commentary from TMCs

Knowledge sharing, understanding different perspectives from different players in the ecosystem, direct access to IATA and industry experts on various NDC and One Order aspects which would in turn help us. Getting our perspective heard and validated on NDC and One Order aspects

Identification, Standard update
Delegate views on what was valuable

Meeting and gaining a perspective from the TMC and Aggregators

How business representatives (TMCs), airlines and IT Provider/Aggregator exchange information.

TMC attendance for sure. Really value their insights and input. The black box of TMC workflow, systems and process is starting to become clearer. It's clear to me that it isn't necessarily NDC itself causing an issue for them. It's more the reliance on existing entities to provide an end to end system, and the gap in the market for this functionality if those entities are not providing NDC. That, and servicing from a standard is there but not so much from all airlines.

Updates regarding the NDC standard, learning how other airlines / IT providers tackle certain challenges

Airlines views/roadmap on Travel Trade concerns IT providers answers to some challenges

Having such a variety in attendance, all parties.

The mixture of attendees and hearing directly from the airlines and the aggregators. The airline roadmaps and also the fact that many acknowledged the gaps that we have for TMCs in terms of servicing capability.

Networking. Leaderboard airlines session

Perspective of TMC’s, Sandbox from Duffell,

Knowing how other IT companies are handling / integrating NDC.

User cases exchange; airlines presentations.
To be continued…