Implementation Forum #4
Shanghai
An IATA Meeting

27 – 28 November 2019
Opening - IATA
Welcome – China Eastern
Introduction - IATA
IATA participants

Geneva, Switzerland
Alex Teixeira
Vanni Sanvincenti
Shaunelle Harris Drake

Beijing, China
Zhe Wang (Ronnie)
Xue Lian
Delegate representation

(69% delegates from Mainland China)
Expect to learn from each other’s NDC experience

- China: 41
- USA: 2
- United Kingdom: 2
- Singapore: 2
- France: 2
- Switzerland: 1
- Jordan: 1
- Ireland: 1
- Germany: 1
- Finland: 1

76% delegation from China
Competition Law Compliance

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.
Agenda

1. Opening - IATA
2. Welcome – China Eastern
3. Introduction – IATA
4. Agent and Aggregator Demos
   - Leaderboard zoom: United Airlines
   - TravelNDC, PKFARE, AirSky/China Union Pay
5. Implementing Orders
   - Leaderboard zoom: China Southern
   - Travelfusion, Spring Airline
   - Leaderboard zoom: Singapore Airlines
   - Servicing: Amadeus, OpenJaw
   - ACCA, SAP
6. Payment
   - Leaderboard zoom: American Airlines
   - Payment support in the standard
   - Spring Airline, TravelNDC
   - Payment differences in China
7. Retailing Air and Non-Air
   - China Eastern (China Rail)
8. Technical Zoom
   - China Eastern, Duffel, OpenJaw
9. Implementing NDC in China – spot the differences
10. Wrapup and Meeting close
Asking questions

• Asking the speakers during the presentation
• Sli.do #S255 throughout the meeting.
• During table discussions

Slido example

@"Presenter", I am an airline: What version of the schema are you using?

@"Presenter", I am an aggregator: have you implemented OrderListRQ and if so, what is your experience?
DINNER

19:30pm

Sli.do
#S255
Airlines are becoming digital retailers
Airlines as digital retailers

**Legacy distribution**
- Process centric
- Fares & Availability
  - Tickets, PNR
- Credit cards
- Settlement
- Service
- Information

**Digital retail**
- Customer centric
- Offers
- Orders
- Zero-click Payment
- Instant settlement
- User-friendly Service
- Real-time information
So let us use the language of digital retailers when possible
A world of Offers & Orders

- Traveler
  - NDC
    - Sellers (with or without Aggregators)
    - Airline own channel Airline.com
  - Dynamic Offers
    - Offers
      - Pricing Merchandising
      - Revenue Management
      - Delivery
      - Accounting
    - ONE Order

Airline own channel Airline.com
At IATA we have different working groups looking after the standards
AIRTechZone.iata.org

For:

• Implementers
• Hackathon developers
• Certification applicants

The Implementation Guide
Schema viewer
The Labs are a collection of developer and educational tools for NDC and ONE Order. Find out more in the various sections below!

Please read the applicable Terms of Use.

- **NDC and ONE Order Sandboxes**
  Connect to these sandboxes to quickly try NDC and ONE Order messages.

- **NDC and ONE Order Message Viewer**
  Get a graphical representation of these messages.

- **NDC and ONE Order Schema Viewer**
  Get a graphical representation of the XML schemas.
It is important to use the implementation guide.

Everyone get’s the benefit of the standard.

Integration is faster, easier
The Implementation Guide

18.2 Move online and start of new structure
19.1 Industry review of lower level content
19.2 Continuation of lower level content review and additional guidance
20.1

we are here
The journey to 2020: IATA NDC Leaderboard

* Effective date: 1 Jan 2020
NDC Matchmaker

Search | Compare | Connect

with NDC partners

www.iata.org/ndc-matchmaker

New!

Featuring more than 150 connections!
Thank You

Shaunelle Harris Drake
Market Overview (2018)

610 Million Passengers Boarded

OTA-centric with mixed models

100 Billion USD Air Travel Market

50+ Scheduled Passenger Airlines

New Retailing Retailing 2.0 Is the theme
Online Travel Market (86B)

- Matured to extremely high concentration on OTA retails.
- TOP5 with 80% market share.
- TOP5 extremely technology capable and swift
- Direct connects widely exist
- SMEs and B&Ms struggling
- Wholesalers behind the scene

Sourced from iResearch Consulting
Ultimate Sort-out

- 64
- 20
- 16

Ctrip Group
Fliggy
Others
TMC Observations (26.5B)

- Fragmented market
- TOP8 only stands 21% of market share.
- Blue ocean.

Sourced from iResearch Consulting
NDC Ecosystem in China

Airlines

- American Airlines (LB)
- British Airways (LB)
- Condor
- Finnair (LB)
- Lufthansa Group (LB)
- Qantas Airways (LB)
- Singapore Airlines (LB)
- United Airlines (LB)

In-house:
- China Southern (LB)
- Cathay Pacific (LB)
- China Eastern
- Spring Airlines
- Xiamen Airlines

3rd-party portal:
- Hainan Airlines
- Shandong Airlines
- Shenzhen Airlines
- Sichuan Airlines

Non-Airlines

IT Suppliers:
- AirSky
- Datalex
- Farelogix
- OpenJaw
- TravelSky
- TravelSky Guangzhou
- Wintelia
- Verteil

Aggregators:
- AirGateway
- AirSky
- Duffel
- TravelFusion
- TravelNDC
- TravelSky
- TravelSky Guangzhou
- FlightRoutes24
- Kayak
- PKFare
- Skyscanner
- Verteil

Sellers:
- China Air Service
- Yunshang
- Tehang

Level 3  Level 4  NDC@Scale
ONE Order in China

ACCA – Accounting
China Southern – Delivery
TravelSky – Delivery & Accounting
Wintelia – Delivery & Accounting
Closing some gaps...

• Direct sales definition
• Revenue Management & Yield Management
• “Thousand people, thousand faces”
• Flight + X
• What is BSP
• Offer & Merchandizing
Thank You

Ronnie Wang
wangz@iata.org