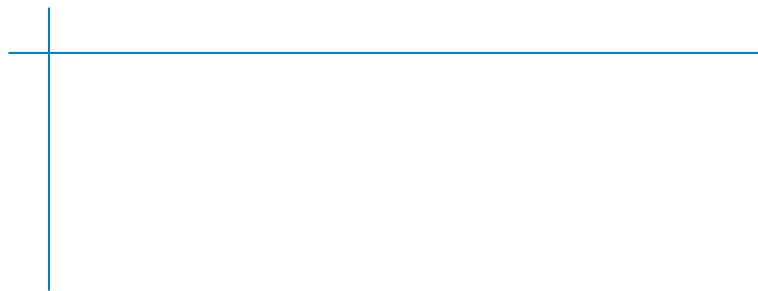




*April 30, 2013*

# **The Market for Airline Passenger Services Systems - 2013**



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# The Market for Airline Services Systems

## Introduction

This is the fifth edition of Travel Technology Research Ltd's (T2RL's) report on the market for airline Passenger Services Systems. The first edition was prepared in September 2009. It was updated in 2010, 2011 and 2012. This edition, published in April 2013 describes the current state of the market using the most recently available contract data along with passenger volume information relating to 2012. The data is derived from T2RL's extensive experience of working with airlines and vendors on the application of information technology to the real world challenges of the modern airline industry.

This report embodies the most current view available of the commercial technologies in use by passenger airlines today. It surveys the vendors of those technologies in some detail and considers how the market is likely to develop over the next few years.

It includes a section on those PSS contracts extended, contracts signed but not migrated and the migrations completed based on 2012 passenger volumes. These have been included in the Executive Summary section of the document.

## Executive Summary

2012 was an active year for the PSS market place with billions of dollars of contracts signed and migrations executed. There is a clear continuation of the trend for airlines to contract with specialist third parties rather than developing and maintaining their own PSS application suite.

Amadeus and Sabre are dominating the very largest transactions, with Sabre having migrated a number of significant customers including Virgin Australia (from Navitaire for Virgin Blue and Amadeus for Virgin Australia), LAN (Amadeus) and Etihad (Amadeus).

Amadeus continues to win large customers all over the World with Southwest and a large Asian based carrier contracting for services in 2012.

### Significant Airline Migrations Executed in 2012 and early 2013.

| Airline             | From   | To             | Migration Completed | 2012 PB Volumes                                      |
|---------------------|--|----------------|---------------------|--|
| Cathay Pacific      | In-House Mainframe                                   | Amadeus        | Feb 2012            | 29.0 Million   |
| LAN Group           | Amadeus  | Sabre          | Oct 2012            | 26.0 Million   |
| Philippine Airlines | In-House Mainframe                                   | Sabre          | Jul 2012            | 8.2 Million  |
| Singapore Airlines  | In-House Mainframe                                   | Amadeus        | Jun 2012            | 18.0 Million   |
| Virgin Australia    | Navitaire (Virgin Blue) & Amadeus (Virgin Australia) | Sabre          | Jan 2013            | 19.5 Million   |
| Etihad              | Amadeus  | Sabre          | Feb 2013            | 10.2 Million   |
| ANA                 | In-House Mainframe                                   | Unisys AirCore | Jan 2013            | 44.5 Million of which about 38 Million are domestic. |