

THE MARKET FOR AIRLINE PASSENGER SERVICES SYSTEMS – 2015

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INTRODUCTION

This is the seventh edition of the annual Travel Technology Research (T2RL) report on the market for airline Passenger Services Systems. The first edition was prepared and distributed in September 2009.

This edition, published in July 2015, describes the current state of the market using the most recently available contract data along with passenger volume information relating to 2014. 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.

Market share information is based on the annual 2014 passenger volumes, adjusted to include current migrations and implementations as at 15 July 2015.

Details of RFPs issued and contracts signed but not migrated are highlighted in the executive summary.

EXECUTIVE SUMMARY

The market place for passenger services systems (PSS) was active in 2014, in terms of airlines competitively reviewing their options and contracting for solutions and acquisitions. Amadeus' recent proposed purchase of Navitaire has yet to obtain regulatory approval but should it do so, Amadeus will have a global market share of about 36%.

However, there were far fewer migrations in terms of volumes of passengers boarded than in the previous year. 2016 will see a peak in migration volumes due to T2RL's treatment of Southwest Airlines' domestic business.

Migrations for Airlines over 3 Million Passengers Boarded per Annum

Year	2013	2014	2015 Projected	2016 Projected	2017 Projected
Annual PBs Migrated during the year ¹	137.1	38.7	117.0 ²	196.6 ³	117.0 ⁴

¹ Based on 2014 passenger volumes.

² Includes US Airways from HP to Sabre, Frontier Airlines from Sabre to Navitaire and AtlasGlobal from in-house to TAIS.