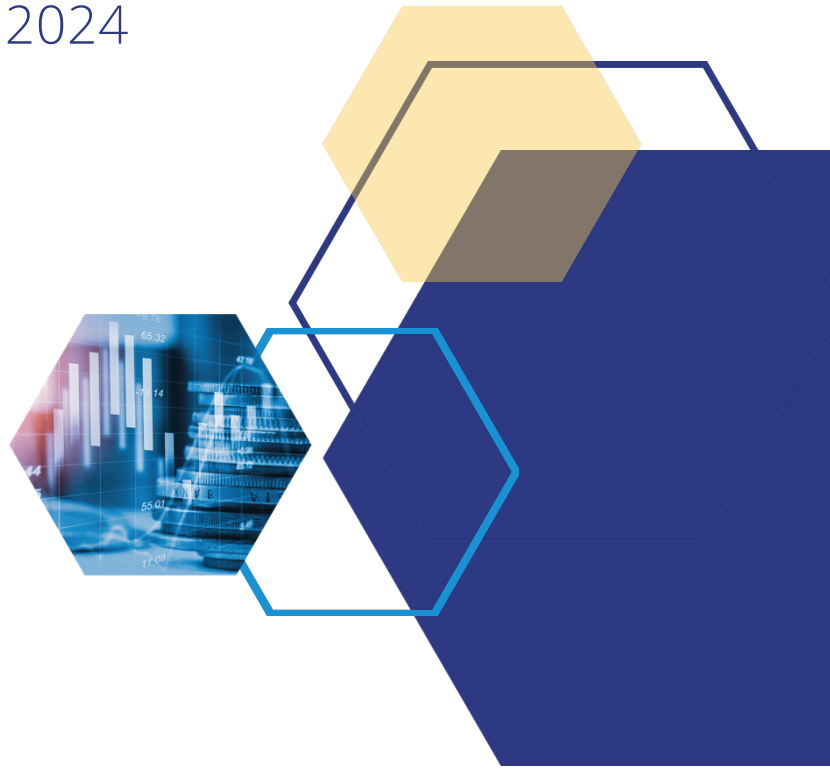
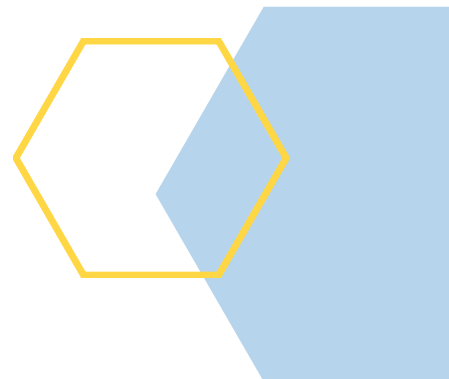




FIRST VIEW
September 2024



CitizenPlane: A New Name in OOSD for Smaller Airlines





THE FACTS

At the T2REngage 24 Conference in London CitizenPlane announced that it has acquired PSS provider TTI and will offer a new “Airline OS” to the market, initially targeting smaller tier 3 and tier 4 airlines.

THE ANALYSIS

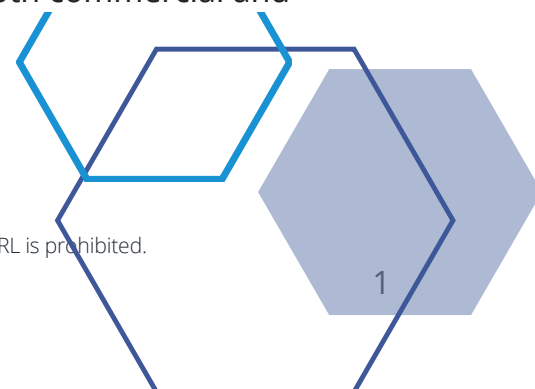
CitizenPlane is a fairly new company that was founded in Paris 2017. Until recently its primary business line was to act as a specialist OTA, selling last-minute inventory directly to travellers. To do this it developed a cloud-based technology platform and it has been looking for opportunities to deploy its software capabilities into adjacent markets.

Travel Technology Interactive is a provider of PSS to tier 4 airlines. It was founded in Paris in 2001 and floated on the Euronext stock market in 2007. The following year it acquired Brazilian competitor CIONS software. T2RL data shows that in 2023 it provided PSS to 39 airlines, of which 32 were active in the scheduled passenger market, and boarded a total of 6.3 million passengers. The largest customer was US-Bangla Airlines whose 1.3 million passengers represented a little over 20% of the total.

In July 2024 CitizenPlane acquired 90% of the shares of TTI. Although this information was in the public domain due to stock market rules there was no indication of the plans for the merged companies until the announcement at T2RL Engage.

The combined entity is offering a product called the CitizenPlane OS with ambitions to extend the deployment of modern retailing technology into the tier 3 and 4 airline market. This will build on the existing Zenith PSS from TTI and add modern distribution capabilities, referred to as the AIR module. In the first instance this is aimed at putting airline content into OTA and metasearch channels but the announcement specifies NDC capabilities which will allow customer airlines to distribute via the GDSs and other aggregators. Eventually the company intends to extend its offering to all aspects of airline IT requirements both commercial and operational.

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This is not the first time a vendor has sought to create a comprehensive software package that forms a one stop shop for airlines. Previous attempts such as the “Airline in a Box” product from SITA several years ago have failed to achieve much traction. While the concept is attractive the execution is very difficult. Thus far airlines have preferred to work with more specialist suppliers across the main functional areas. If CitizenPlane is to break the mould and effectively create an extended ERP for airlines it will need deep pockets, patience and perhaps a little luck.

THE SPECULATION

The one-stop-shop idea comes around every few years and so far it has not been successful. In 2024 there are a couple of factors that may make it different this time. The transition to commercial processes based on OOSD mean that airlines will have to take a hard look at their whole commercial IT stack whether they feel ready to or not. This could open the door to modern software providers with the ability to invest and the skills to do so. The other factor is the near universal adoption of cloud deployment that should ease the challenges of implementation and integration.

Whether these factors are enough to allow CitizenPlane to succeed where others have fallen remains to be seen. It certainly has an opportunity at a time when the large technology vendors are concentrating their efforts on top-tier airlines. A solution that caters to smaller airlines and is easy to implement definitely has a shot. The total market opportunity for tier 3 and 4 airlines in 2023 was 750 million PBs across almost a thousand carriers. Extending the scope to include operational requirements may be a step too far but we certainly applaud the ambition.

T2RL Travel Technology Research Ltd, is an independent sourcing and research company that specializes in airline technology and distribution. Based on data since the year 2000 it has tracked industry trends for airlines as well as their IT providers, distribution partners, and customers. All parties use its research to make informed business decisions to meet current and future needs. For further information, visit our website at www.t2rl.com.

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