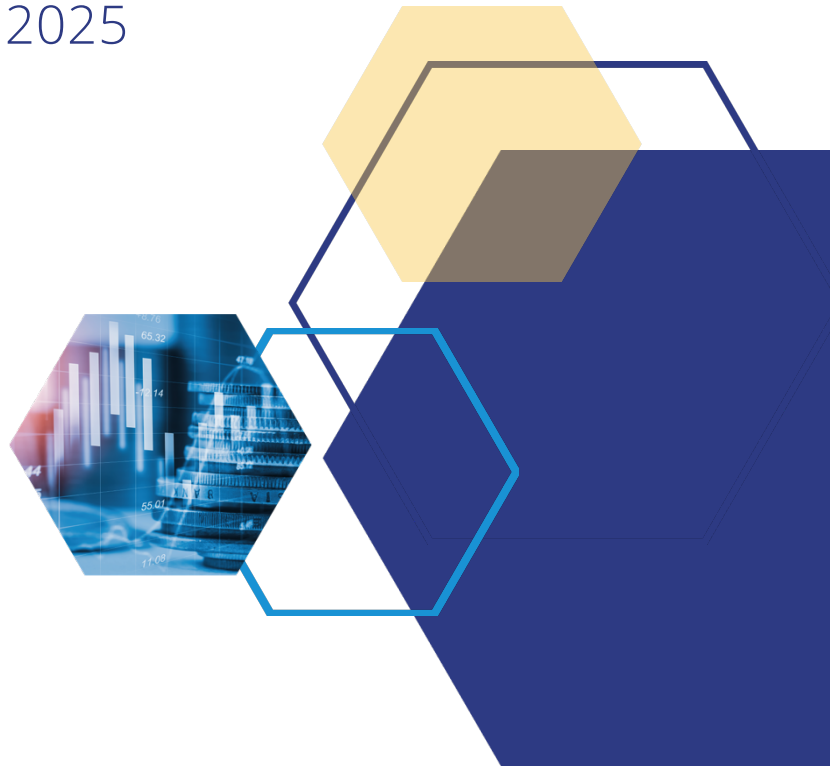
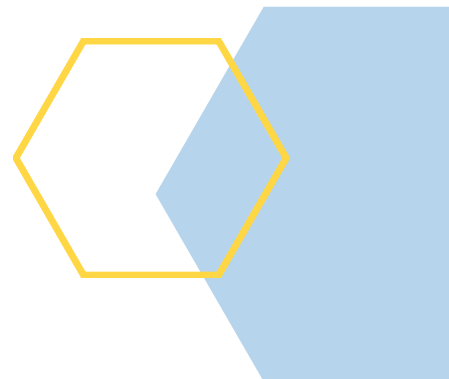




FIRST VIEW
September 2025



Retailer Adds to the OOSD Landscape





THE FACTS

On 9 July 2025, Air Europa announced it had gone live with Retailaer's Offer and Order Management System (OOMS), enhancing agent shopping and servicing of flights, ancillaries, and bundled offers.

THE ANALYSIS

The company was founded in 2018 in the UK by Anders Lofgren from Sweden and Dzmitry Paklongski from Belarus. Anders Lofgren brings extensive experience in eCommerce and airline retailing from roles at Amadeus, Sabre, Etihad Airways, Brussels Airlines, S7 Airlines, Caribbean Airlines, and SAS.

S7 Airlines proved fertile ground for Retailaer's capabilities. The carrier separated sales and IT from operations, with S7 Travel Retail acting as the eCommerce provider and building OTA-style features alongside direct sales. In this environment, Anders worked with S7 IT to design a hybrid model combining OTA functionality with the airline's direct channel, initially powered by Openjaw's t-Retail. How this structure has evolved since the isolation of Russian airlines and the move to ORS (TAIS) is not yet clear.

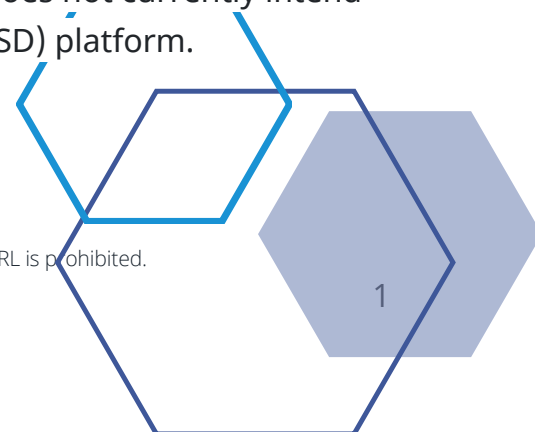
Retailaer's early customers included S7 Airlines and Azerbaijan Airlines, though several headwinds, such as the Covid-19 crisis and political/economic instability in the region, forced the company to survival mode - shifting operations from Russia to Georgia, securing its intellectual property, and updating the product's architecture.

Retailaer positions itself as a practical OOMS solution for mid-tier airlines, especially those hosted on Amadeus Altea, that want to modernise selling and servicing without disrupting core systems, eg PSS. The platform effectively gives airlines OTA-like capabilities, enabling them to retail travel - flights, ancillaries, and third-party products - in a way that aligns with modern eCommerce practices. It does not currently intend to compete as an end-to-end Offer-Order-Settle-Deliver (OOSD) platform.

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Retailaer has a comprehensive set of capabilities. It supports 'dynamic pricing adjustment' and content biasing, customer profiles and loyalty integration, in addition to some payment orchestration. Sales channels include direct sales, mobile, manage-my-booking, contact centre sales, and agency sales. It also has NDC API capabilities.

The call centre module is noteworthy, as it allows airlines to service and monetise bookings (PNRs and EMDs) regardless of source, whether from a GDS, direct channel, or OTA, by creating an order. The platform synchronises orders with the PSS.

For Air Europa, Retailaer powers Air Europa Go for corporate sales and Air Europa Direct for agency partners. By securing Air Europa as a reference client, Retailaer strengthens its positioning and demonstrates the appeal of a lightweight but capable OOMS to carriers below the scale of the global majors.

THE SPECULATION

Retailaer is a tenacious player with a pragmatic OMS approach and new market traction which are serious strengths. It is likely to serve well the existing and future needs of mid-tier airlines looking to grow revenue through eCommerce.

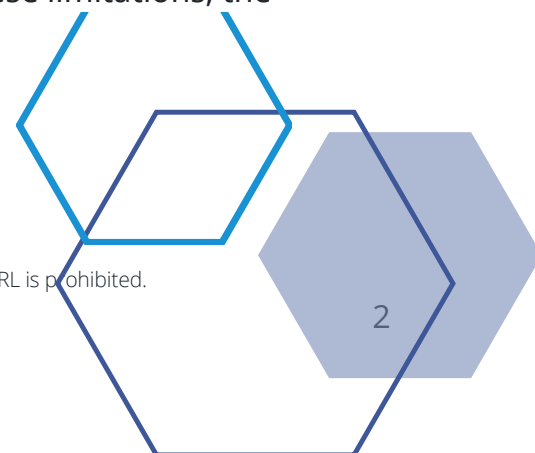
With Air Europa as a live customer, it is positioned to expand into a sizeable market. If Retailaer pursues Amadeus tier 3 and 4 airline customers, this represents 76 airlines carrying 200 million passengers annually, before even addressing carriers hosted on other PSS platforms.

Retailaer covers fare shopping well but lacks native flight-offer optimisation capabilities, instead adjusting content and price within the shopping process. Since optimisation is more effective at the point of offer construction, Retailaer may need to rely on partners such as PROS to bridge this gap. Despite these limitations, the solution made a strong impression in the shopping space.

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The company's broader vision includes enabling airlines to retail non-traditional items such as food, drinks, and lifestyle products. While technically feasible, this may prove too ambitious for most mid-tier airlines.

The aspiration to become an Amazon-like platform where partners manage their own inventory is bold. Success will depend on whether airlines see meaningful demand and margin in extending beyond travel essentials.

While Retailaer's lightweight 'box on top' architecture is compelling today, over time it may be superseded as airlines migrate to native offers and orders. Retailaer may choose to evolve toward a 'PSS-less' capability, but there is no urgency for this given the current needs of its mid-tier target market.

For Air Europa and other mid-tier carriers, Retailaer offers a fast track to modern retailing. Its Amazon-style vision remains untested, but its core proposition - practical, modular retail enablement on top of existing systems - is both credible and timely.

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