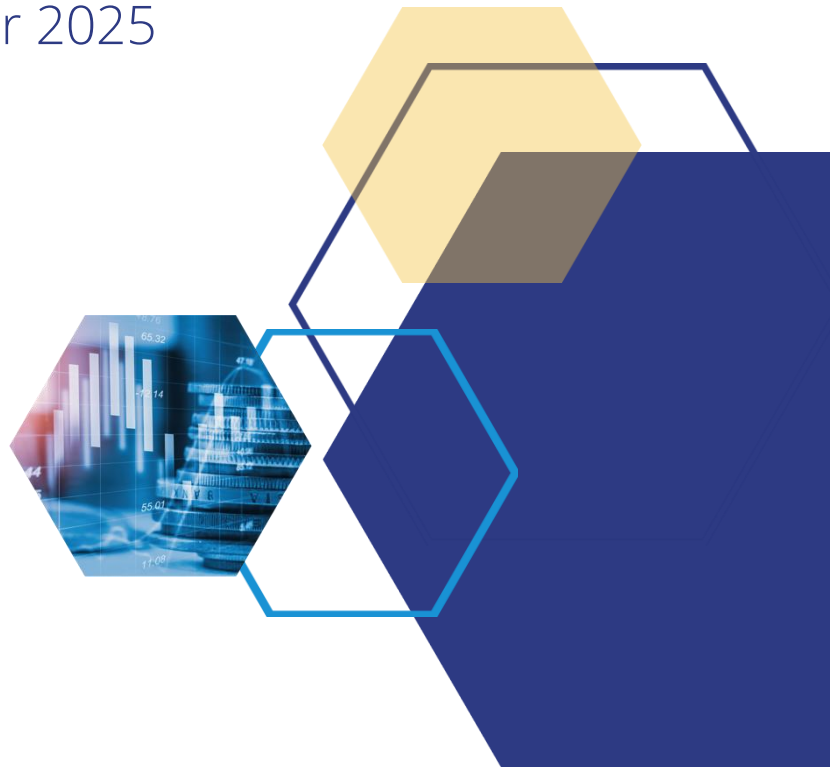
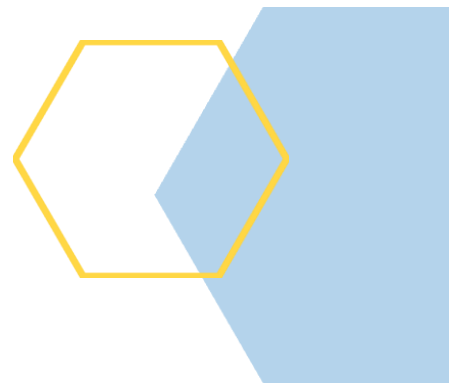




FIRST VIEW
November 2025



Fairlyne's New Take on an Old Challenge



THE FACTS

In July 2025, Fairlyne, a Paris-based startup, launched a white-label Resale-as-a-Service platform for Transavia France, which is now live across the airline's digital channels. Royal Air Maroc, Vueling and Flair Airlines have subsequently joined the customer list. Passengers with a non-refundable fare who can no longer travel can initiate a resale request, with the airline deciding whether and when to recover the seat and compensate the original buyer, typically via voucher or loyalty currency.

THE ANALYSIS

Ticket resale models have been proposed in various forms for more than a decade but have never gained meaningful traction. The only airline we are aware of to allow full peer-to-peer resale of tickets is Flybondi in Argentina which claims to be "the first and only airline in the world to give passengers the possibility of doing whatever they want with their ticket" - including resale.

Similar attempts, typically structured as open marketplaces or secondary ticket exchanges, ran into predictable resistance from airlines wary of revenue dilution and loss of inventory control. Fairlyne has inverted that approach.

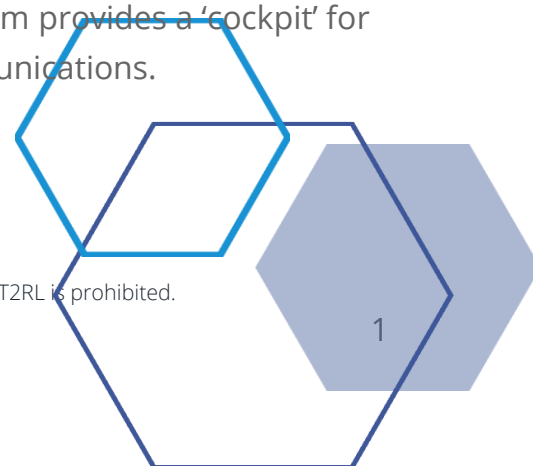
This platform is entirely airline-controlled. It invites and targets eligible passengers to request a resale with details of how the process works. Passengers can request to return capacity to the airline and the carrier defines its own eligibility rules based on load factor, lead time, and other commercial conditions.

When a seat is recovered, the airline can reintroduce it into the yield curve, allowing the revenue management system (RMS) to recalculate demand and optimise pricing across fare classes. The premise is that the seats are resold through the airline's existing channels at a higher contribution margin. The platform provides a 'cockpit' for airline teams to manage business rules, eligibility, and communications.

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In practice, there are many factors that would impact whether the recovered seat can be resold at a higher margin. These include the remaining demand for the flight, willingness to pay, the ability of the RM system to recognise the seat as "cancelled/recovered" and the original price at which it was sold. It requires an additional data feed to the RM system and some changes to that system's models to manage such seats and determine if the return of the ticket is commercially desired by the airline.

The question now is scale and scope. The "no-brainer" use case of recovering non-refundable seats on high-demand flights may deliver strong margins but applies only to a limited subset of total inventory. Early results with Transavia claim up to 6% RASK uplift on high-demand flights although this is likely boosted by the peak-summer launch. The true test will be performance during periods of softer demand.

While most LCC fares are non-refundable, only a fraction of departures will generate sufficient residual demand for resale to meaningfully affect yield.

In addition, allowing resale on fares that are normally non-refundable could blur the distinction between low- and high-priced tickets, making it harder for airlines to justify the premium on more flexible fares. Airlines will therefore need to manage carefully how and where resale options are applied within their broader fare strategy.

What is notable from its customer list is that Fairlyne has achieved multiple PSS integrations (Amadeus Altea, Navitaire and Intellisys) indicating this is not a 'one-trick pony' platform but is positioned for scale.

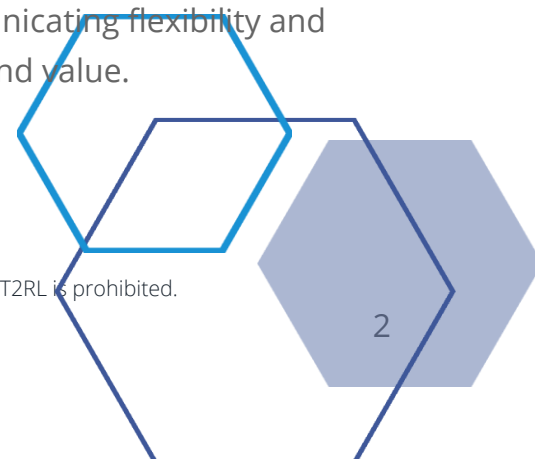
The Fairlyne model may have a downstream financial impact. Compensation in vouchers or loyalty points introduces deferred revenue that must remain on the balance sheet until redeemed or expired. At scale, this can create accounting complexity and affect loyalty economics.

Beyond incremental margin, the reputational upside (communicating flexibility and fairness to passengers) can deliver material goodwill and brand value.

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THE SPECULATION

Operationally, Fairlyne's value proposition straddles multiple airline functions such as Revenue Management, eCommerce, Customer Experience, Marketing, and Loyalty. The team's ability to gain go-to-market traction across these often-siloed functions, is a risk factor to Fairlyne's success. However, if it continues to demonstrate measurable yield uplift while staying integrated with airline revenue management processes, it could in theory, move from being a niche tool to become an established lever for offer optimisation. To do so, it would compete with slightly different models provided by vendors such as Optiontown and Volantio.

If Fairlyne keeps its model squarely within airline revenue-management economics, maintains a focus on brand perception, and continues to add credible reference deployments such as Transavia France and Flair, we expect it to fare measurably better than resale experiments of the past.

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