Synopsis

AFRAA – Distribution Committee

Date: May 17, 2026

The Two-Stage Flight Plan: How African Airlines Can Modernize Retailing Without Ripping and Replacing

One hundred percent of African airlines surveyed last year by AFRAA and TPConnects identified reducing distribution costs as a strategic priority.

Yet 48% still had no NDC capabilities, and over 90% remained heavily dependent on traditional GDS channels. But there's a pragmatic path forward that doesn't require ripping and replacing your entire technology stack or breaching existing contracts. It's called NDC-first, OOSD-ready - a two-stage approach that lets African airlines build distribution independence today while future-proofing for the full retailing transformation tomorrow.

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The African Airline Distribution Reality: Small, Agile, Ready to Move

The TPC-AFRAA Airline Distribution Survey 2025 reveals a clear profile: 81% of respondents carry fewer than 2 million passengers annually, and 40% operate fleets between 6 and 15 aircraft. These aren't weaknesses - they're indicators of organizational agility that mega-carriers can't match.
The challenge is equally clear. Airlines are contractually bound to legacy agreements they can't simply walk away from. Yet momentum is building. Over 40% of surveyed airlines are already planning or implementing NDC.

The appetite for change is there. The question isn't whether to modernize - it's how to do it without operational disruption.

Le plan de vol en deux temps : moderniser le retailing sans tout remplacer

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Une réalité africaine favorable. L'enquête TPC-AFRAA 2025 dresse un profil clair : 81 % des compagnies transportent moins de 2 millions de passagers par an et 40 % exploitent 6 à 15 avions. Loin d'être une faiblesse, cette taille est un atout d'agilité que les méga-transporteurs n'ont pas. Plus de 40 % des compagnies interrogées planifient déjà le NDC.

Étape 1 — NDC-first. La passerelle Astra NDC se superpose au PSS existant, créant un canal de distribution propre à la compagnie sans rompre les contrats en cours. À la clé : baisse des coûts par réservation, revenus annexes débloqués (bagages, sièges, repas), maîtrise de la marque, relation directe avec les agences via des portails B2B et propriété des données clients. Astra propose la version NDC 24.4, l'une des plus récentes au monde — déjà adoptée par Egypt Air — permettant aux compagnies africaines de sauter les contraintes des anciennes versions (17.2, 18.2).

Étape 2 — OOSD-ready. Avec Astra Nova et ses cinq modules (catalogue produits, gestion des stocks,

Why NDC-First Makes Strategic Sense: Building Parallel Channels

NDC is about creating a parallel, airline-owned distribution channel that works alongside existing infrastructure while giving you back control. At the AFRAA Stakeholder Convention, we elaborated on Air Cairo as a success story in the African market.

Modern NDC gateways - like TPConnects' Astra NDC - sit on top of the existing PSS. The gateway can even layer on top of a basic NDC capability your vendor already provides, effectively decoupling distribution innovation from your core contract.

Lower distribution costs per booking: Reduce or eliminate GDS segment fees on direct and agent portal transactions

- **Ancillary revenue unlocked:** Sell baggage, seat selection, meals, lounge access with rich media presentation - capabilities often limited in traditional channels

- **Brand control:** Present your full product range the way you want it seen, not filtered through existing display limitations

- **Direct agency relationships:** B2B portals give agents NDC access without complex integrations, smoothing the transition

- **Customer data ownership:** Build profiles, understand behavior, enable personalization

- **Future-proof retailing foundation:** solution built for modern airline retailing with flexible APIs and MCP layer that fast-tracks trade partner onboarding, adapts to emerging distribution channels, and continuously unlocks new revenue opportunities.

The African Market Context:
For intra-African routes where you compete with road and rail transport, the ability to dynamically bundle offers (flight + baggage + flexibility) and present them seamlessly on mobile devices becomes a competitive weapon. For corporate contracts, showing negotiated pricing and ancillary options in real-time builds trust and reduces manual quotation cycles.

des offres, des commandes et pont vers le PSS existant), les compagnies migrent à leur rythme, sans rupture. Les plateformes sont agnostiques au PSS.

Le moment est venu : les premières compagnies à agir capteront les économies et les revenus, tandis que les autres verront leurs marges s'éroder.

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Why "NDC-First" Now:

Many pioneer airlines deployed NDC on versions 17.2 or 18.2 - both now showing their age with limitations in servicing workflows, penalty calculations, and payment handling.

TPConnects' Astra NDC now offers NDC version 24.4, one of the most current enterprise-stable versions available globally. Egypt Air, one of Africa's leading carriers, now offers NDC version 24.4 to Travel Sellers, demonstrating that African airlines can leapfrog legacy version constraints and implement current-generation retailing capabilities from day one.

You leapfrog legacy version constraints. While established carriers grapple with upgrading from 17.2 or 18.2 - a complex, expensive process touching multiple integrated systems - new NDC adopters can deploy modern capabilities from day one. You avoid the 18-month upgrade cycle trap. Airlines on older NDC versions face pressure from aggregators and partners to upgrade as capabilities and standards evolve. Starting with 24.4 means you won't need a disruptive upgrade in 18 months. You can move directly to OOSD when you're strategically ready.
You get enterprise-grade capabilities now. NDC 24.4 delivers corrected penalty calculation workflows, improved payment instructions, refined order item structures, and better servicing flows - the nuts and bolts that determine whether NDC works reliably at scale.

Astra NDC also includes capabilities purpose-built for modern airline retailing:

• **Automated group booking workflow:** Astra integrates group booking natively, with the entire group booking process - inventory allocation, pricing, ancillaries, name adding, servicing, tracking - running automatically through the B2B portal. For African airlines serving corporate, government, and pilgrimage traffic, this removes a major friction point for both agents and airline staff.

• **Model Context Protocol (MCP) for AI integration:** As AI agents become part of travel shopping and servicing, Astra is ready for seamless integration.

• **ConvertEngine for conversion optimization:** Look-to-book ratios improve through intelligent caching solutions that predict high-intent probability and reduce computational costs by 60%, while maintaining 97% accuracy.

NDC-first means immediate ROI, controlled risk, and a foundation that grows with you.

OOSD-Ready with Astra Nova: The Bridge to Full Retailing Transformation

OOSD - Offer, Order, Settlement, and Delivery - represents the ultimate vision of modern airline retailing. It's the shift from ticket-and-EMD-based accounting to order-based commerce, enabling true retail flexibility: dynamic pricing, post-purchase upsells, transparent multi-party settlements, and seamless service delivery tracking.

This is why "OOSD-ready" matters as much as "NDC-first."

The Astra Nova Modularity Approach:

TPConnects' Astra Nova is built on a principle that respects the reality African airlines face: you can't afford big-bang transformation, and you shouldn't have to.

Astra Nova delivers five core modules that work together or independently:

1.Product Catalog: Define products once - flights, brands, ancillaries, bundles - and distribute them across all channels from a single source of truth.

2.Stock Keeper: Real-time stock management that synchronizes across your legacy PSS and modern OOSD infrastructure simultaneously.

3.Offer Management: Assemble dynamic, personalized offers in real-time, pulling from product catalog and inventory, applying business rules and dynamic pricing.

4.Order Management: A single source of truth for all bookings regardless of channel, supporting the full order lifecycle from creation through fulfillment.

5.The Bridge to Legacy: This is the game-changer. Astra Nova enables bi-directional synchronization between your existing PSS and the OOSD platform. Orders created in the OOSD system update in the PSS. Changes in the PSS reflect in order management. You run both systems in parallel during transition.

The Phased Migration Strategy:
This architecture enables modernization at your own pace: start with B2B portals (low-risk, controlled volume), progress to corporate direct channels (test servicing workflows), then consumer channels (unlock upsells), and finally indirect channels. Throughout, your legacy PSS continues operating - no disruption, no forced cutover. Astra and Astra Nova are PSS-agnostic. For African airlines under long-term PSS contracts, this is the path to regaining distribution control without contractual conflict.

Your Practical Roadmap

The survey showed 60% of respondents face integration difficulties and lack internal expertise. Here's how to bridge that gap:

Start with high-impact routes. Pilot NDC on routes with strong ancillary potential or corporate demand. Learn. Measure. Iterate.

Empower agents. Deploy branded B2B portals making NDC access simple. Invest in training - many agents are waiting for clarity, not resisting change.

Build capability gradually. Each NDC booking processed builds team expertise. By the time you're ready for OOSD, you'll have staff who understand modern retailing through daily practice.

Measure what matters. Track distribution cost per booking, ancillary attachment rates, look-to-book conversion. These metrics prove ROI and guide next-phase investment.

Partner strategically. African airlines need technology partners who deliver swift time-to-market and hands-on support. TPConnects has supported African carriers - including Egypt Air and Air Cairo - through NDC deployment and B2B portal launches, understanding regional market dynamics and operational realities.

The Window Is Open

The convergence of several factors makes this the right moment for African airlines to act:

- **Industry momentum:** 40%+ of your peers are moving on NDC. Early movers will capture distribution cost savings and revenue opportunities while others wait.

- **Technology maturity:** NDC 24.4 and OOSD platforms like Astra Nova are proven, enterprise-ready solutions - not experimental pilots.

- **Market dynamics:** Mobile adoption, intra-African travel growth, and corporate demand create the commercial environment where owned distribution channels deliver competitive advantage.

- **Agility advantage:** Your size, which might seem like a constraint, is actually your strength. You can transform faster than legacy mega-carriers burdened by complexity.

The two-stage flight plan is clear: NDC-first to take control of distribution, reduce costs, and unlock ancillary revenue today. OOSD-ready to future-proof your investment and transition to full retailing transformation when your organization is strategically prepared.

You need the right architecture, the right partnership, and the commitment to start.

African airlines that move now will own their distribution channels, control their brand presentation, capture customer relationships, and build retailing capabilities that drive sustainable growth. Those who wait will continue watching margins erode under distribution costs they don't control.

Contact our team to discuss how Astra NDC and Astra Nova can accelerate your retailing modernization:

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