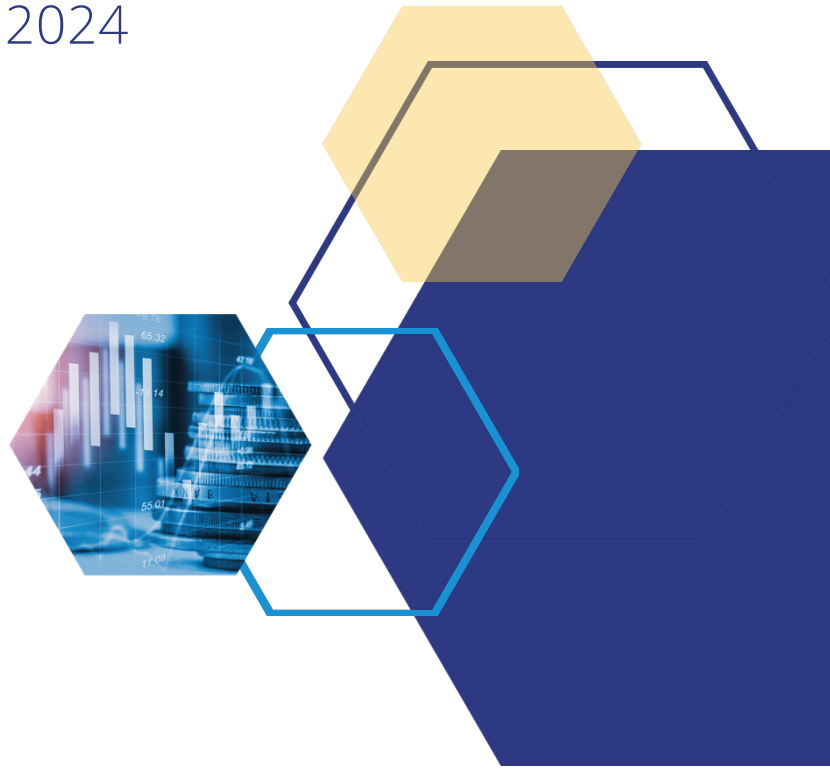
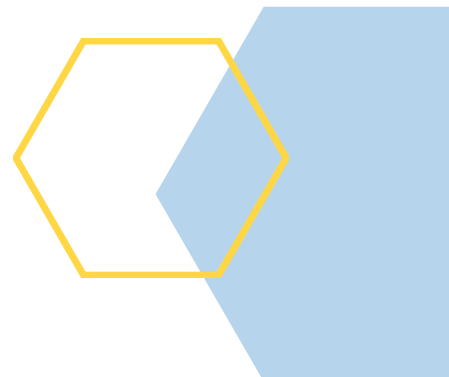




FIRST VIEW  
September 2024



# Sabre Announces its Mosaic Launch Customer





## THE FACTS

At the T2REngage 24 Conference in London Sabre and Virgin Australia announced that the Australian airline is the launch customer for SabreMosaic, providing Offer, Order and Deliver services.

## THE ANALYSIS

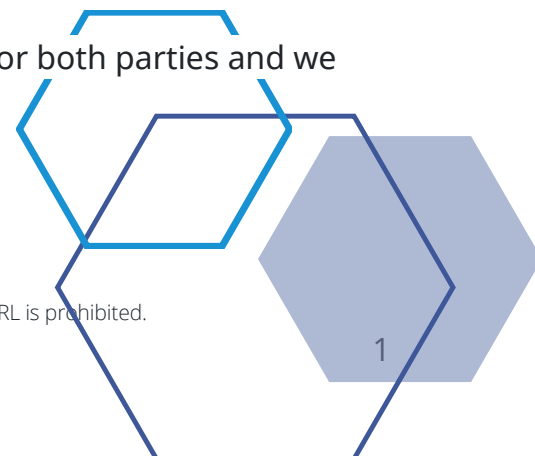
The two dominant providers of airline commercial technology in the western world are Amadeus and Sabre. Last year Amadeus announced its OOSD product, Nevio, with two launch customers. Sabre announced its equivalent, Mosaic, earlier this year with messages of support from a number of airlines but no confirmed customer. Now it has one and it is significant. Virgin Australia boarded 19.4 million passengers in 2023 and is projected to break into tier 1 status by 2026. This after a torrid period around the Covid-19 pandemic that included a spell in administration, new owners and a substantial shift in commercial strategy.

The announcement had been anticipated for some time by T2RL and other industry observers. Virgin Australia is an existing Sabre PSS customer and the deal includes the extension of that relationship as well as the distribution contract with the Sabre GDS. Both of these will remain relevant during the anticipated long transition period when the airline industry will be working in both the new and the old environments. It includes a comprehensive set of functionality including Sabre's successful Air Price IQ and Ancillary IQ modules. The Delivery component includes Sabre's Disruption Management Suite.

Speaking at T2REngage, David Hogarth, CIO at Virgin Australia said he expects to see the first Orders created in SabreMosaic during 2025 but he declined to say when the last PNR would be purged. In our opinion this is a very wise stance as the transition period will be long and will very much depend on the actions of third parties that are outside the airline's control.

In T2RL's view this is a significant and valuable relationship for both parties and we look forward to seeing it come to full fruition.

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## THE SPECULATION

Just like the three customers announced so far for Amadeus Nevio, Virgin Australia will be moving from a traditional PSS supplied by the same vendor. This is a significant factor in derisking the transition. We await with great interest the first announcement of an OOSD contract where the vendor is not the incumbent.

We also await the first instance of the much-trailed ability of the OOSD architecture to support modularity in technology provision. At T2REngage Sabre was crystal clear that all the APIs in its Mosaic platform will be open and documented. This opens the possibility of an airline taking parts of the Sabre solution alongside components from a third party to create a unique configuration to support its specific requirements. While this is a particularly exciting prospect it does depend on all parties involved making sensible commercial proposals. We do expect to see the first such deals quite soon but we suspect it will be a long time before we see a part-Sabre, part-Amadeus solution go into production.

*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](http://www.t2rl.com).*

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