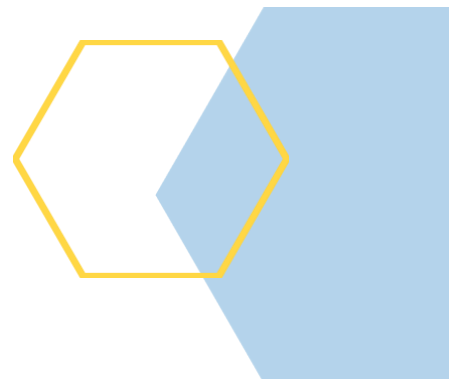




FIRST VIEW
June 2025



Hitit Joins the OOSD Fray





THE FACTS

At the IATA Offers & Orders Forum in Geneva on 18 June Hitit announced Oxygen, an airline retailing platform using native Offers and Orders. The announcement included the fact that the new system is already in live use at Pegasus Airlines.

THE ANALYSIS

As momentum gathers for the adoption of modern airline retailing based on Offer-Order-Settle-Deliver the shape of the future market is beginning to emerge. Established PSS market leaders Sabre and Amadeus have made the early running with commitments for their Mosaic and Nevio platforms. A number of challengers have emerged including Hitit, Accelya, PROS, Flyr, and IBS. Navitaire by Amadeus and Radixx by Sabre could arguably be added to this list. All of these vendors have announced their willingness to compete in the market for comprehensive OOSD solutions but Hitit is the first to announce not only an airline customer commitment but also that its system is already in production use. A month earlier Amadeus announced that Finnair had created the first native Orders in the industry using the Nevio platform. This week's announcement suggests that when the history of this period is written the Amadeus claim may prove to have been premature.

Hitit is a relative newcomer in the world of airline commercial IT. Its PSS was first implemented in 2004 but at the time of T2RL's first report on the market for PSS in 2008 it did not yet appear in the list of significant vendors. Based on 2024 passenger numbers it is now the fifth placed PSS vendor (of 32), serving 47 airlines and managing 80 million annual passengers. The launch of Oxygen indicates a firm intention to consolidate or improve on that position as the industry adopts OOSD.

The announcement claims that Pegasus Airlines is on track to process 10 or 12 million passenger bookings with native Offers and Orders in the next year. As Pegasus carried 37.5 million passengers in 2024 this would indicate that around a third of its business is going via the new platform. T2RL estimates that the airline's distribution is split almost 50/50 between web bookings and others, with 11.5% using its NDC

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connections. Hitit is already the PSS, NDC and Revenue Accounts provider for Pegasus and the company has a good record of close cooperation with its most significant customer. Both companies are based in Istanbul which doubtless facilitated the necessarily intensive level of interaction as the new platform was inaugurated and selected business migrated to it.

THE SPECULATION

This market is still in its infancy. The biggest question is whether the new platforms will simply be straight replacements for existing PSSs or if the vision of more modular systems allowing multi-vendor implementation will prevail. As a generalisation it may be expected that the challenger companies will favour the modular approach while the established giants prefer to present themselves as one-stop shops. With this development it appears that Hitit is getting closer to the established giants in ambition definitely and perhaps in practice too.

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.

