



# How is LOT transforming its retailing strategy to secure over 30% NDC adoption?

Amadeus. It's how travel works better.



## Transformation through NDC

Many airlines are taking greater control of their distribution and enhancing their retailing capabilities as part of their transformation journey.

The aim is to **enhance profitability, upgrade customer experience and improve servicing benefits**. [McKinsey and IATA predict that improved retailing techniques could generate \\$45 billion in new value across the global airline industry by 2030.](#)

One of the first building blocks of airline retailing transformation is IATA's New Distribution Capability (NDC), an XML-based data transmission standard introduced in 2012 enabling airlines to offer richer, more personalized content and offers to customers.

[IATA's goal of 100% NDC adoption by 2030](#) presents **a significant challenge**. According to a 2024 survey of over 150 airlines by IATA and BCG, 81% had operational NDC channels and were actively modernizing their distribution strategies, with larger carriers leading the way. However, despite the momentum, overall, the global NDC adoption is far from the 100% target of 2030.

**LOT Polish Airlines** (LOT) implemented NDC through Amadeus Altéa NDC at the end of 2023 and saw its NDC adoption rate scale **from zero to more than 30% within a year of launch**. This impressive result was made possible by **a strong technological and commercial partnership with Amadeus, coupled with close collaboration** throughout the implementation journey.

## LOT's path to going live with NDC

LOT is Poland's flag carrier and a founding airline of IATA. Established in 1929, LOT is one of the oldest airlines still in operation.

LOT's ambition is to **become a leading player in the retailing transformation** through modern multi-channel distribution. Recognizing **NDC as a key enabler of this ambition**, the airline has made enhancing service quality and passenger satisfaction a strategic priority for 2028. By then, LOT plans to expand its aircraft fleet by around 30% - from 86 to 110 aircraft - and increase annual passenger numbers by approximately 70%, reaching 16.9 million by 2028.

In 2023, LOT launched its NDC program for travel sellers – **LOT Open Connect** - powered by the Amadeus Altéa NDC solution, which the airline had contracted earlier. The program enables **traveler-centric retailing by delivering more personalized content at every stage of their journey**, while also allowing LOT to respond more flexibly to evolving traveler preferences and needs.

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LOT Open Connect, powered by Amadeus Altéa NDC, empowers travel sellers to create truly personalized travel experiences for LOT customers by **giving sellers access to a rich array of ancillary services, and the flexibility to book through their preferred channels**, all within the LOT Open Connect ecosystem.

Furthermore, thanks to Amadeus, we can **onboard new partners quickly and efficiently and implement new features** that allow us to adapt distribution to our specific business needs.”

Magdalena Laskowska,  
Manager, Maintenance and Support Unit  
of Commercial Systems, LOT



For LOT, understanding its in-house capacity for technology development while learning best practice from across the industry was key when devising its NDC program. The airline recognized not only the lack of necessary features in current systems but also the challenge of a fragmented distribution market. This led the airline to **rethink its structure, operations, and business aims**.

Meanwhile, travel sellers were concerned about how NDC would impact their workflows and revenue streams LOT was committed from the outset to ensure that its NDC strategy benefits not only airlines but also travel sellers.



# LOT wants to be present where its customers are, which requires a multi-channel strategy.

The airline focused on **delivering targeted solutions for all market segments to drive adoption** - ensuring that travel sellers have the flexibility to choose the option that best fits their needs. These solutions, developed with Amadeus, include:

NDC APIs, a stable and scalable shopping solution

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Working with aggregators, making fares accessible in a familiar environment for agents

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The LOT Agency Tool, powered by Amadeus Seller UI, targeted at local travel sellers

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Setting up these capabilities was a crucial step in LOT's NDC journey.

Between signing its expanded IT deal with Amadeus and launching LOT Open Connect, a comprehensive plan was implemented involving travel sellers alongside the airline and Amadeus. This plan defined business goals, aligned partners' plans, conducted workshops and training sessions with a focus on developing internal skills.

## LOT's strategic NDC rollout



### July 2021

Signature of Amadeus Altéa NDC and distribution contract of NDC-enabled content through Amadeus Travel Platform.

### April 2023

Test launch of LOT Open Connect

### July 2023

Official launch of LOT Open Connect, the new NDC-based distribution platform

### February 2024

First phase of content differentiation (introduction of surcharge and content removal)

### December 2024

NDC adoption rate reaches 30%

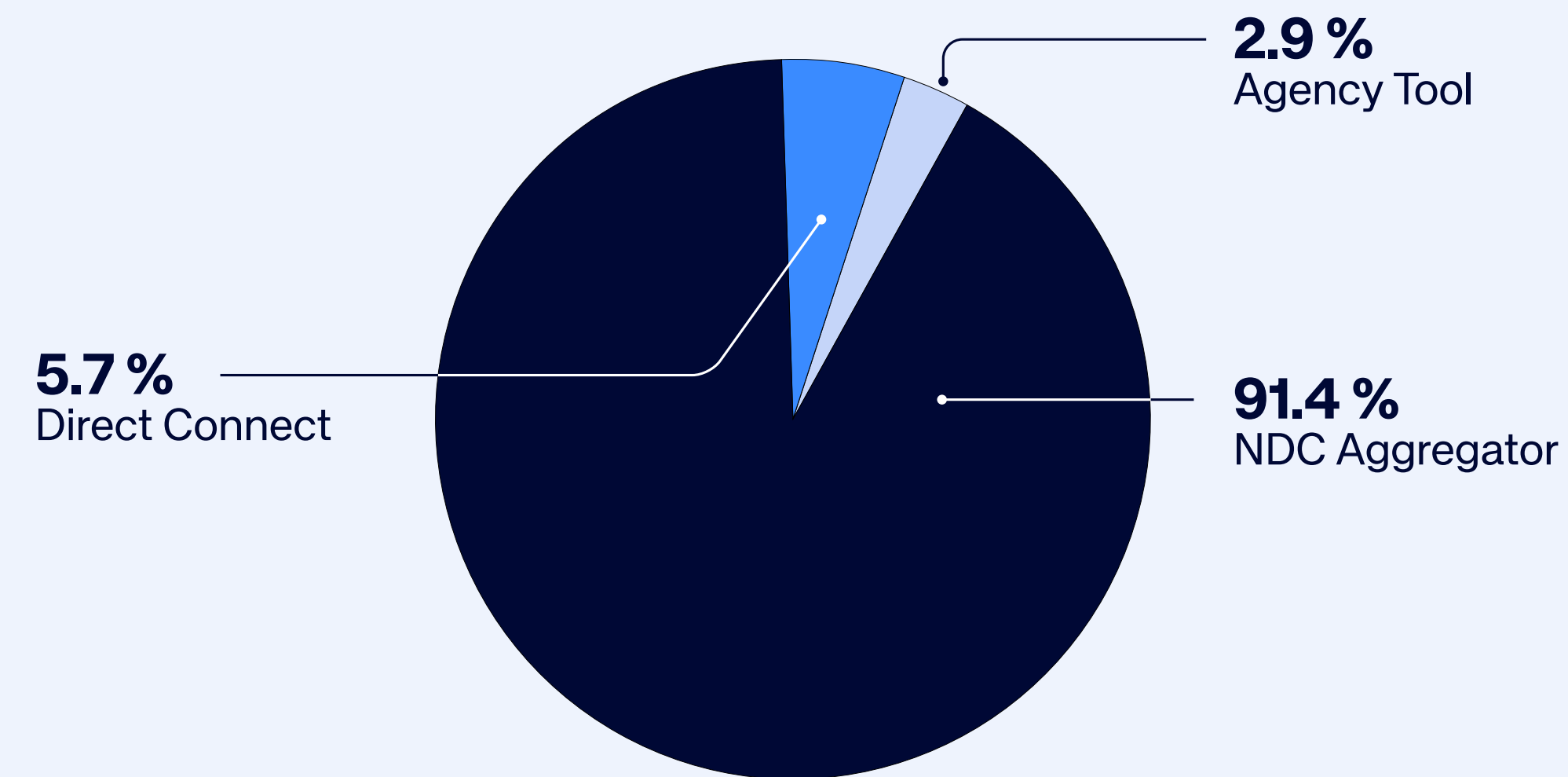
### February 2025

Further content differentiation:

- surcharge increase
- removal of lowest fares
- LOT's dynamically priced ancillaries using Amadeus Anytime Merchandising, only available through LOT Open Connect.

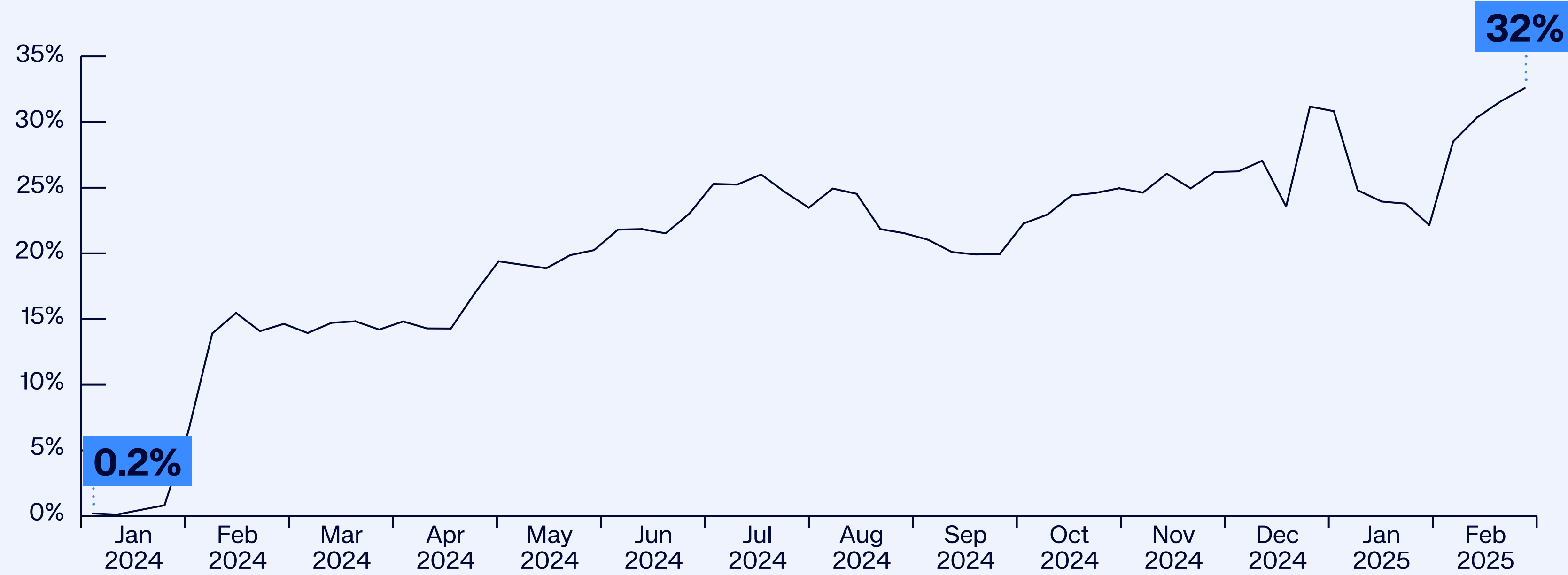
## NDC results

LOT's NDC share (%) by NDC channel YTD Jun-25



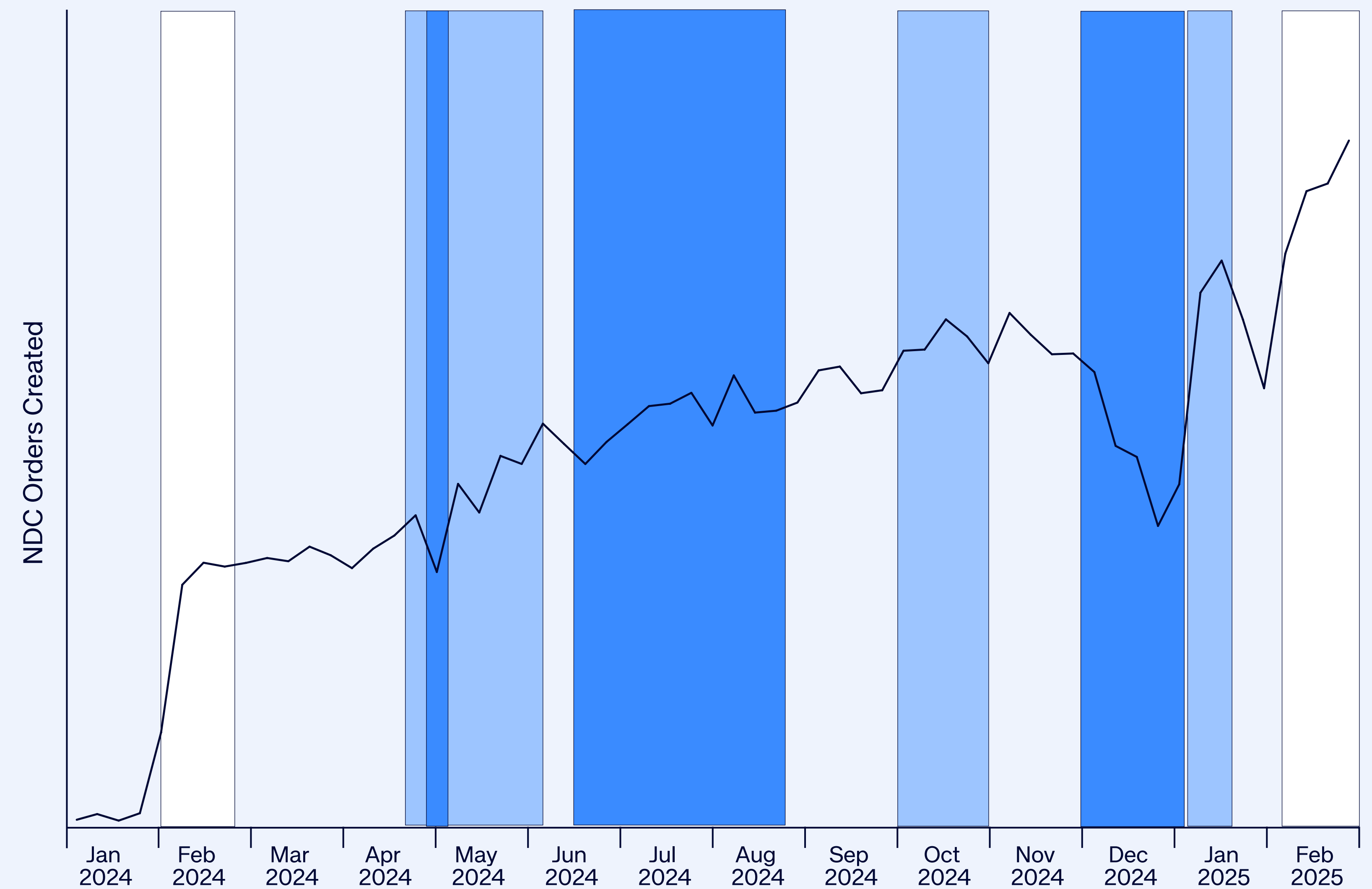
By June 2025, over 90% of LOT's NDC bookings came through aggregators, with smaller shares via Direct Connect (5.7%) and the Agency Tool (2.9%), highlighting the airline's strategic focus on aggregator-driven distribution.

LOT's weekly NDC adoption - NDC flight coupons (%) Jan-24 to Feb-25



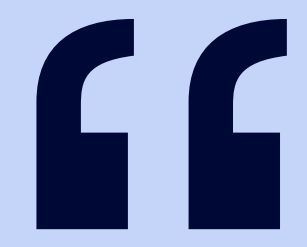
The weekly percentage of NDC flight coupons compared with the total number of flight coupons – went from 0.2% in January-2024 to over 32% in February-2025.

LOT's weekly NDC volume of orders created Jan-24 to Feb-25



- **Content differentiation**  
(surcharge and content removal)
- **Commercial activities**  
(new seller partner's activation, new leisure destinations, and promotions)
- **Seasonal impacts**  
(public, summer, and winter holidays)

The weekly NDC volume of NDC orders created increased significantly between January 2024 and February 2025. LOT implemented a series of initiatives during this period which had a positive impact on the NDC order volumes, highlighting real gains in NDC bookings beyond just the adoption percentage.



By working closely with Amadeus, LOT has recorded a **substantial increase in the share of NDC within indirect sales channels, now surpassing 30%**. This advancement has significantly enhanced our cooperation with distribution partners and sales agents, with **12 partners** – three direct and nine aggregators – implemented as of the end of February 2025.

Moreover, the **data insights** enabled by NDC play a crucial role in supporting the execution of our corporate strategy.”

Dawid Karaś,  
Vice-Director,  
Agency Sales, LOT



What LOT has achieved is truly impressive. Their **structured, timely, and committed approach to NDC** reflects strong leadership and vision.

By anticipating change and involving Amadeus early, they’ve shown that **success in NDC requires more than technology**. It’s about commercial clarity, content readiness, capability building, and strong collaboration.”

Ghaleb Rostom,  
Head of Portfolio Product Management,  
Airline Solutions, Amadeus



## The Amadeus Seller UI journey

Branded by the airline as LOT Agency Tool, Amadeus Seller UI is a user-friendly interface that allows airlines to expose and distribute NDC content directly to specific travel sellers. For LOT, it serves as a **strategic driver of its NDC growth**, supporting adoption by local selling partners and agents.

In 2023, the LOT Agency Tool was developed for the prime booking flow and contributed 0.2% to LOT's NDC revenue share.

In 2024, the tool was enhanced to include both servicing and prime booking flows, serving also as a testing tool for NDC content. This channel's contribution rose to **2.4% of LOT's NDC revenue share**, a significant increase from the previous year.

**Benefits** of Amadeus Seller UI for travel sellers:

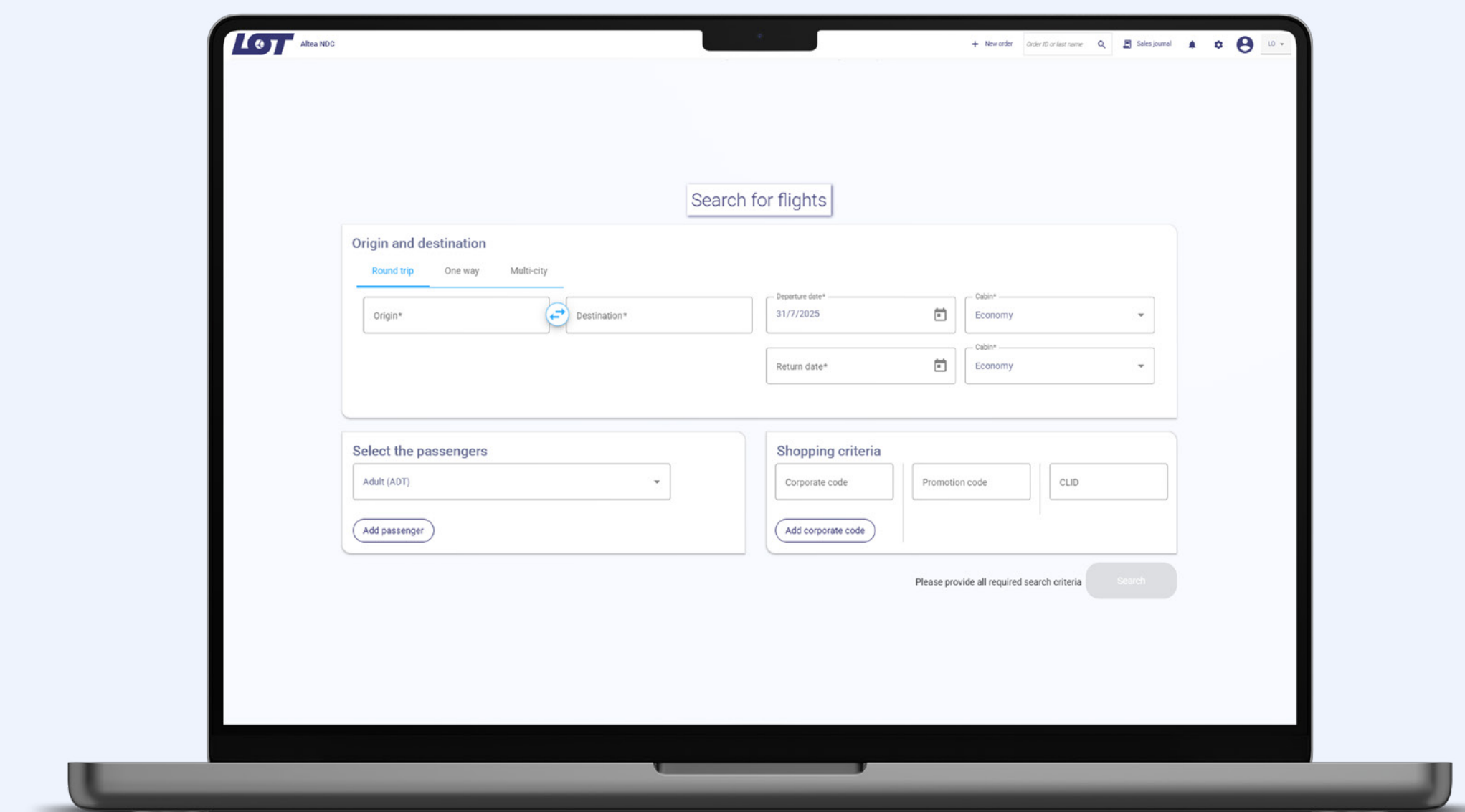
Ideal for sellers who lack resources for complex systems

An end-to-end graphical interface that simplifies booking and servicing

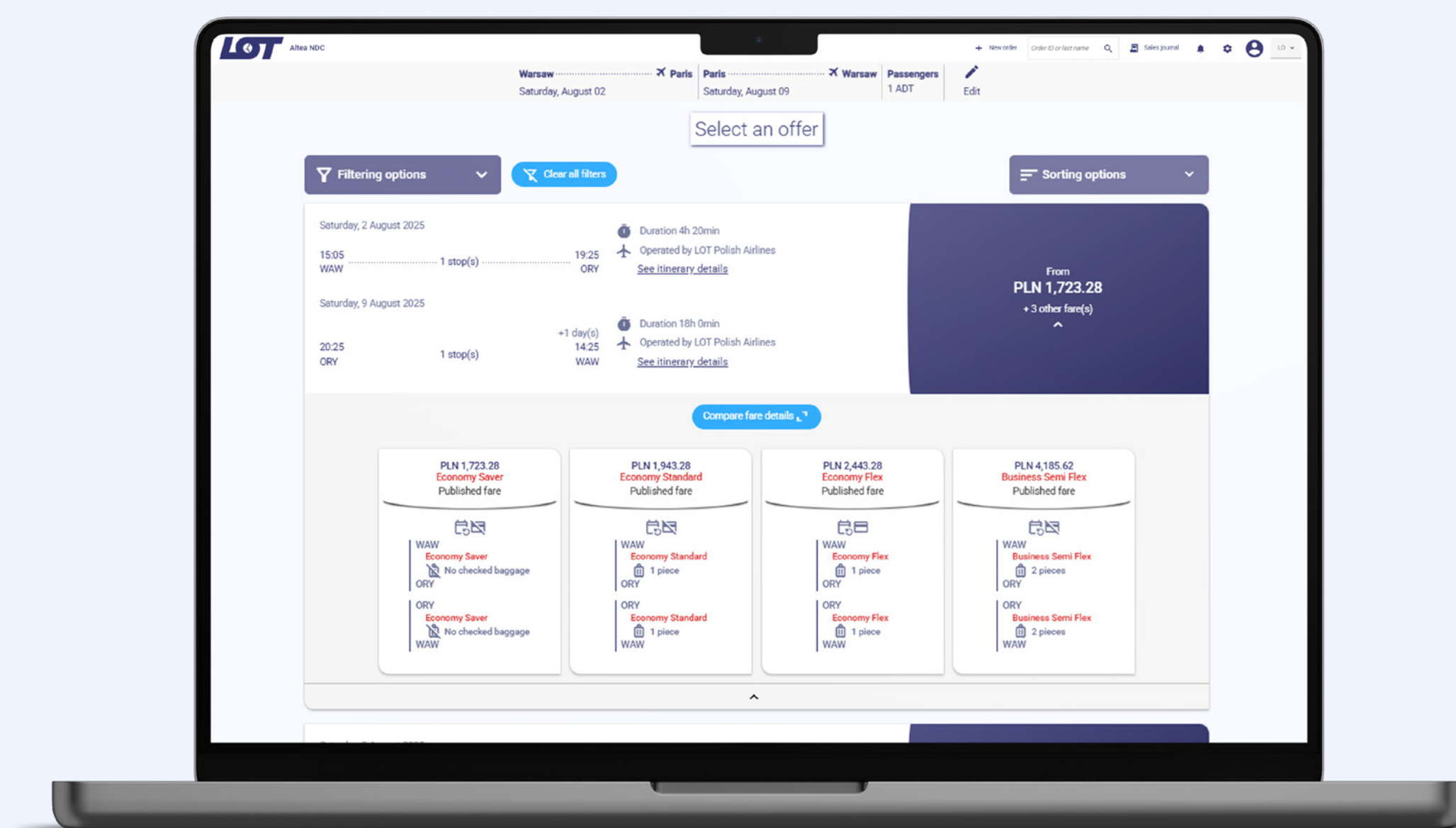
Designed to meet the specific needs of local sellers and support their own NDC journey

## LOT Agency Tool

### Search page



### Results page



## Key collaboration with Amadeus Travel Platform and travel sellers

Amadeus Travel Platform is the preferred choice for LOT's travel sellers thanks to its advanced capabilities and its full integration with the broader travel seller IT ecosystem.

Ahead of its NDC launch, LOT visited over 80 travel sellers in Poland. Using their feedback, the airline worked with Amadeus to **develop specific functionalities** that meet local needs and reduce the need for technical assistance.

**Customer support** was another critical area. To smooth the transition, **Amadeus became the first point of contact** for all travel seller inquiries about LOT's NDC content. Many travel sellers preferred the cryptic environment to the graphic interface. To overcome this, Amadeus conducted **familiarization exercises**, presenting the Amadeus Selling Platform Connect UI to sellers while helping handle travel seller questions.

One in every three bookings made on the Amadeus Travel Platform is powered by NDC. **LOT and Amadeus continue to collaborate on enhancing the platform**, introducing new functionalities to better meet travel sellers' changing needs.

**1 in every 3 bookings  
on LOT**

made on the Amadeus Travel Platform is powered by NDC.



We're proud to support LOT in their NDC journey through the Amadeus Travel Platform. Our close collaboration has enabled the **delivery of robust capabilities and dedicated customer support**, ensuring LOT's content reaches travel sellers efficiently and drives strong adoption across the ecosystem."

**Delphine Domingues,**  
Head of Travel Distribution Product  
Marketing Management, Amadeus



## The future: LOT targets 100% NDC adoption

LOT's long-term objectives are centered around further developing content differentiation to reach 100% NDC share in the indirect channel, within IATA's 2030 timeline.

It is also looking at **optimizing shopping volumes** to better control look-to-book ratios - the average number of search requests before a flight booking is made. Overall, it is aiming to **become a leader in NDC adoption in Europe**.

To achieve these goals, LOT is focusing on shopping and distribution optimization by **implementing new API partners and collaborating with Amadeus** to enhance its NDC capabilities. This will also help the airline further **optimize distribution costs**.



The **NDC capabilities** LOT aims to develop in the future

Service involuntary changes to enhance customer satisfaction and reduce airline call center workload by efficiently handling disruptions.

Address the Airlines Reporting Corporation (ARC) void window to minimize financial risk through timely ticket voiding.

Monitor, manage, and optimize the volume and quality of shopping requests.

Implement NET fares along with dedicated LOT programs to improve market competitiveness.

Continue leveraging Amadeus Anytime Merchandising and dynamic pricing to increase revenue through personalized, real-time offers.

This **comprehensive approach** is helping LOT stay competitive and efficient in a rapidly evolving airline industry. Through NDC, **LOT is defining its retailing strategy, embracing modern solutions to streamline operations and elevating its customers' experience**. This transformation not only enhances customer satisfaction but also drives revenue growth and operational agility.

**aMaDEUS** | **LOT**