Amadeus’ industry leadership comes with the responsibility of working with other stakeholders in the interest of the travel industry at large. Amadeus therefore engages regularly with governments, public entities, trade associations and other institutions globally.

The travel and tourism industry is becoming an increasingly strategic sector for the economies of many countries. For the industry to grow sustainably, governments and private stakeholders worldwide will have to pay more attention to how our industry improves its efficiency, reduces its carbon footprint and takes advantage of its potential as a catalyst for inclusive economic growth.

Tackling these challenges requires completely new models of collaboration between industry players and the public sector. At Amadeus, we participate in, and often initiate, the industry debate on how collaboration should evolve. We see travel technology playing a key role in an increasingly digitalized travel and tourism marketplace, and Amadeus thus also has an important role to play as a facilitator for the global teamwork that is needed to shape and safeguard a sustainable travel industry.

Amadeus’ Industry Affairs unit works with stakeholders across the global travel industry – public and private – to build a common agenda based on the principles of neutrality and transparency, fair competition, consumer choice and respect for society. We take a fact-based approach to working with our partners to bridge differences and find solutions and standards that take into account the needs of all stakeholders in a fair manner, and that therefore work for everyone in the travel value chain.

In line with these principles, we have launched industry initiatives jointly with our partners in many areas, including environmental and social sustainability, regulatory and industry matters and consumer protection.
Our approach to industry engagement

Key principles
- Fair competition
- Consumer choice
- Transparency and neutrality
- Collaboration and broad engagement
- Fact-based analysis

Priority areas
- Accessibility and social impact
- Regulations and public policy
- Fair competition and market access
- Consumer and passenger rights
- Industry sustainability and environmental performance

Sharing our insights and balanced perspectives with public stakeholders

Amadeus contributes to regulatory reviews and provides input for policy initiatives, especially those relating to the transport, tourism and technology sectors. The travel and tourism industry is complex, and we are therefore proud to be asked to contribute to several consultations, research studies and workshops sponsored by national and regional public stakeholders. We share our experience, insight and balanced perspective, always supported by evidence and fact-based analysis.

In 2018 Amadeus was asked to provide information, knowledge and advice to many EU regulatory and policy initiatives in order to establish new or improve existing legislation. In the United States and other markets, our work focused more on industry collaboration.

As part of our collaborative approach, Amadeus maintains a regular dialog with the European Commission on aviation, rail and travel distribution matters and the digitalization of travel, tourism and transport. Below are initiatives in which Amadeus has actively participated during the last year.

Promoting transparency, neutrality and fair competition in the air travel and distribution market

In 2018 Amadeus worked closely with the European Commission and the European Parliament in an advisory capacity to offer balanced, fact-based views on how best to develop the complex and challenging aviation marketplace. Amadeus was pleased to see that the importance of transparency and neutrality for air travel information and the need to safeguard the key characteristics of the EU’s aviation markets are recognized by the European Commission as well as the European Parliament.

The air travel distribution market is currently facing severe threats to transparency, fair competition and consumer choice. New non-neutral players and the commercial strategies of certain...
incumbents challenge the open and competitive air distribution market that the Global Distribution Systems offer. This development affects primarily the ability of SME players to compete in the market, as well as consumers’ ability to make the best purchasing choices in the absence of transparent comparison.

In 2018 Amadeus was especially active in responding to requests for information and support for policy initiatives relating to airline and digital distribution issues in the aviation sector. In this context, the regulatory reviews of the Common Rules for the Operation of Air Services (Regulation (EC) No. 1008/2008) and the Code of Conduct for Computerized Reservation Systems (Regulation (EC) No. 80/2009) were of utmost importance, and Amadeus provided balanced views on the need to protect transparency, neutrality and fair competition in the air travel and distribution market through regulation.

In November 2018 the European Commission opened an investigation into the air distribution market in the EU, and at Amadeus we reiterated our full and open cooperation in this process, confirming that we would address all the concerns the commission may have. This will ensure that the investigation takes into account all relevant factors, and will demonstrate that Amadeus stands for fairness and neutrality in airline distribution, providing non-discriminatory and neutral market access for airlines and choice for consumers and travel buyers.

Bringing expertise and technology to improve the European transport system and empower multimodality

Amadeus continued to support the goal of the EU to establish a smart and efficient transport system through innovation. We contributed to this important objective by assisting the EU in promoting and opening a constructive dialog in addition to sharing our technological expertise.

In 2018 the European Commission celebrated the Year of Multimodality to raise the importance of multimodality for greener passenger transport within and across the EU. In line with the objectives of the year, we worked with several EU technology projects and participated in events.
Commitment to protecting passenger rights and consumer choice

Passengers and consumers are important stakeholders in most of the policy and regulatory initiatives launched by the EU in the transport and travel distribution environments. At Amadeus, we believe in transparency and choice within a neutral marketplace to serve the consumer’s best interests. That is why protecting consumer choice and ensuring consumers have access to transparent travel data to compare and shop air and other modes of travel is a critical pillar to building a competitive marketplace.

In this respect, we contributed to the rail passenger rights regulatory initiative launched by the European Commission’s transport unit, as well as its consultation study conducted on passenger rights across all transport modes. Our input and contribution focused on neutrality and transparency provisions, so as to empower passengers to make informed choices and support the development of rail and multimodal travel.

We also provided input for the fitness check of EU consumer and marketing legislation with the aim of ensuring consistency across different policies and regulatory initiatives, to safeguard the right to transparent and neutral travel information and to balance regulatory mandates with the market realities of the industry.

Advising and collaborating toward an innovative and sustainable tourism sector

Amadeus strongly supports governmental policies and initiatives to support a robust and sustainable tourism sector. We engage with other travel industry and public stakeholders at national and regional levels and conduct activities to promote innovation, entrepreneurship and collaboration in travel and tourism. During 2018 Amadeus was invited to speak at several events around the globe, with special focus on digital-related issues and tourism.

In the EU, we advise on tourism development issues and collaborate in developing the industry. In line with this, we were happy to see the European Parliament dedicate a budget line of more than €300 million for the next multi-annual financial framework. The result was a true achievement resulting from work that started back in 2015 and a remarkable recognition of the increasing importance of the tourism industry at times of major cuts in different EU policies.

In our advisory role in the technology and digital marketplace, we participated in a panel at the European Tourism Day in Brussels on the disruption caused by the digital traveler on traditional tourism services. In our intervention, we highlighted the need to enable SMEs to remain competitive through innovation within a fair and competitive marketplace.

We also participate in multiple initiatives at market level in Europe sponsored by public and industry stakeholders, providing advice and support to digital transformation initiatives undertaken by travel companies. For example, Amadeus is collaborating in Spain with industry stakeholders and the government in the launch of DIGITUR, a project to support the digitalization of tourism destinations.

Engaging private sector and trade industry stakeholders

In the vast landscape of different private sector and trade industry stakeholders in travel and tourism, Amadeus engages with selected players in an open and constructive dialog on industry issues. We collaborate in our own trade associations and partner with our airline and travel agency customer organizations to work toward common public policy goals. As an active partner, our door is always open, and we maintain strong and close relationships with institutional stakeholders, consumer advocates and many other travel and tourism associations across the globe.

2 Amadeus collaborates with private and trade associations around the globe. Our total expenditure in memberships and consultation under this category is reported in the EU Transparency Register: http://ec.europa.eu/transparencyregister/
Mapping of Amadeus stakeholders in the private sector and trade industry

**Travel technology**
- ETTSA European Technology and Travel Services Association
- Travel Tech US Travel Technology Association
- Airlines
  - IATA International Air Transport Association
  - A4A Airlines For America
  - ALTA Latin American and Caribbean Air Transport Association
  - A4E Airlines for Europe
- Other travel providers
  - HEDNA Hotel Electronic Distribution Network Association
  - HTNG Hospitality Technology Next Generation
  - OTA OpenTravel Alliance
  - ACI Airports Council International

**Travel industry**
- Travel agencies
  - ECTAA European Travel Agents’ and Tour Operators’ Associations
  - ASTA American Society of Travel Agents
  - WTAAA World Travel Agents Associations Alliance
  - PATA Pacific Asia Travel Association
- Consumers
  - EPF European Passengers’ Federation
  - BEUC Bureau Européen des Unions de Consommateurs
- Corporations
  - GBTA Global Business Travel Association
  - National business travel associations
- Travel and tourism associations
- Corporations
  - UNWTO United Nations World Tourism Organization
  - ETC European Travel Commission
  - WTTC World Travel and Tourism Council
  - ICAO International Civil Aviation Organization

**Institutional**
- Contribute to social, technological and business development through strong institutional relationships
- Other
  - UNFCCC United Nations Framework Convention on Climate Change
  - Chambers of commerce

**Industry and regulatory development**
- Economic growth and sustainable development of travel
- Contribute to social, technological and business development through strong institutional relationships

**Other**
- Contribute to social, technological and business development through strong institutional relationships
- Other
  - UNFCCC United Nations Framework Convention on Climate Change
  - Chambers of commerce
Travel technology associations championing fair competition, neutrality and transparency in the market

At industry level, Amadeus is represented indirectly through our memberships with the European Technology and Travel Services Association (ETTSA) and the US Travel Technology Association (Travel Tech). ETTSA and Travel Tech represent the indirect neutral distribution industry on regulatory and industry matters in the EU and the US, respectively.

In 2018 ETTSA was particularly active, engaging on key issues related to aviation and air ticket distribution, such as the regulatory reviews of the Common Rules for the Operation of Air Services (Regulation (EC) No. 1008/2008) and the Code of Conduct for Computerized Reservation Systems (Regulation (EC) No. 80/2009). During those reviews, ETTSA and its members have maintained a close dialog with the European Commission and the European Parliament to ensure that transparency, consumer choice, access to neutral information, non-discrimination and fair competition continue to be guaranteed in the revised regulation and potential policy guidelines. These are principles that have duly protected European consumers and fostered competition in the airline distribution marketplace in the past decades.

ETTSA has contributed to the debate opened by the European Parliament on the impact of some large airlines’ initiatives in Europe on consumers and SMEs. In this respect, ETTSA was invited to participate in a panel discussion along with other industry stakeholders on airline distribution channel discrimination, organized by the Transport Committee of the European Parliament in July 2018.

ETTSA also actively engaged other allies representing travel agencies, passengers and travel buyers to form a coalition to protect neutrality, transparency and fair competition in the airline distribution market, and to highlight that access to neutral and transparent travel information provided by the Global Distribution Systems enables comparison and choice for European citizens and stimulates competition among airlines based on their merits, resulting in lower ticket prices. ETTSA’s contribution to opening and fostering an active industry dialog with other public and trade stakeholders will continue to be factual and supported by proper research. The studies conducted on relevant market developments in the airline distribution market are being refreshed, reflecting the recent commercial initiatives by large airlines and their impact, especially on the way consumers compare and buy airline tickets.

Finally, ETTSA, as a signatory to the European Tourism Manifesto, the largest industry coalition supporting the European tourism sector, will continue to contribute to any industry and public efforts to reinforce the competitiveness of the travel and tourism sector in Europe, in particular those related to innovation and technology.

In North America, Travel Tech advocates for public policy that promotes fair competition, industry standardization and improved price transparency for consumers.

Working with trade associations on common agendas

We build strong relationships with industry trade associations that represent the interests of our customers and other stakeholders in the travel sector.

Defending universal and business model–neutral standards at airline associations

Amadeus is a long-time strategic partner of the International Air Transport Association (IATA), and engages actively with the airline community in the development of industry standards. We share advice and knowledge in Amadeus’ areas of expertise in working groups, advisory forums (New Distribution Capacity, Passenger Distribution Management and Transparency in Payments) and think tanks (Airline Industry Retailing, One Order, One ID and Simplify the Business).

Our active engagement in the development of new industry standards is needed to ensure that IATA’s standards actually improve the efficiency of the airline distribution value chain

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and take into account the needs and requirements of all stakeholders in it. Moreover, Amadeus and other industry stakeholders are concerned about industry standards being non-discriminatory in nature, developed without favoring any one player in particular and business model–neutral.

To ensure broad industry engagement, Amadeus is also a member of the Airline Distribution Stakeholder Forum (ADSF), an open forum comprising trade associations in indirect airline distribution, including travel agencies. During 2018 ADSF and the newly formalized and operational Distribution Industry Standards Working Group (DISWG) directly engaged with IATA on developments of the agency accreditation models, IATA’s settlement systems and proposed industry standards on payment, specifically referred to as “NewGen ISS” and “Transparency in Payment.” Amadeus’ and industry stakeholders’ efforts in this area have resulted in the formalization of IATA’s Distribution Advisory Council (DAC), with independent distribution stakeholders now well represented. This forum is especially noteworthy in that, after persistent insistence by Amadeus, it now brings together all airline distribution stakeholders (airlines, agencies and Global Distribution Systems and other IT providers) in a formal and IATA-sanctioned group to address strategic issues and overall industry evolution. Continued efforts by ADSF, DISWG and the newly formed DAC will demonstrate the benefits of broader industry collaboration on standardization processes by consolidating the views of the indirect distribution industry’s experts on how standards should be developed for optimal impact and wider adoption in the marketplace.

Close collaboration to bring value to the travel agency community

The travel agency community represents a very relevant partner for Amadeus to develop common industry initiatives related to key policy areas. Amadeus works closely with the travel agency community across the world, represented by the World Travel Agents Associations Alliance (WTAAA), of which the European Travel Agents’ and Tour Operators’ Associations (ECTAA) and the American Society of Travel Agents (ASTA) are the most important members.

As an allied member of ECTAA, we work together in areas of common interest relating to air travel distribution, strategic guidance on the development of industry standards, and the establishment of a sustainable tourism sector. In order to do so, we conduct joint research studies and promotion, and we establish open and transparent dialog with other industry parties in working groups and advisory forums.

We also partner directly with travel agency associations at both regional and national levels in the rest of the world. These organizations are important advocates for the travel industry as a whole, supporting transparency and neutrality, fair competition and the development of a sustainable travel and tourism sector.

Our representation in the travel buyer community

Amadeus is an allied member of the Global Business Travel Association (GBTA) and collaborates closely with GBTA affiliates and other business travel associations in many countries. As their industry partner, we support their industry events and awareness-raising and training initiatives, and we work together on industry issues of common interest. Comprehensive access to neutral, transparent and comparable travel content is a key requirement for travel sellers and buyers, and both the travel seller and travel buyer communities are strong proponents of fair competition and consumer choice driven by a neutral and transparent marketplace for travel services.

Protecting consumers in the travel industry

Amadeus has built an active dialog with consumer and passenger associations to jointly promote a neutral and transparent marketplace for travel, so that consumers can compare offers and select among competing providers, thus benefiting from a deregulated marketplace. During 2018 we engaged especially with the European Passengers’ Federation and the national consumer representatives, the voices of European consumers on issues related to the airline distribution marketplace. Amadeus has been asked to share insights about the regulatory framework protecting consumers, how technology facilitates the passenger experience and how neutral and transparent indirect distribution is safeguarding fair competition among airlines and giving consumers neutral and transparent choice.
Public–private sector partnerships to transform the industry

In the tourism sector, we work closely with the United Nations World Tourism Organization (UNWTO), of which Amadeus is an affiliate member. During 2018 Amadeus and UNWTO renewed our partnership and set a common agenda to promote sustainable development in the sector through joint initiatives: sustainable transport and tourism systems; digital transformation of the industry; poverty reduction and social inclusion through employment in travel and tourism; and climate-neutral tourism growth. Under this collaboration, Amadeus shared our expertise in innovation, start-ups, smart destinations, social issues and sustainability in dozens of forums with public and private stakeholders in the travel and tourism industry.

Amadeus is a full member of the World Travel and Tourism Council (WTTC) in support of the broader travel and tourism industry, which generates over 10% of global GDP. Specifically, Amadeus has been directly engaged in thought leadership sessions on key concepts such as interoperable and consumer-centric industry standards; open and transparent collaboration frameworks in support of security and travel facilitation; leveraging digital technologies and biometrics; and sustainable growth for our industry. Furthermore, in 2018 Amadeus was again a partner of the WTTC Global Summit, organized in Argentina, and we initiated an even deeper collaboration for the 2019 edition of the event, which will take place in Seville, Spain.

As an associate member of the European Travel Commission (ETC), Amadeus supports a broad range of activities related to strengthening the tourism industry in Europe as an engine of economic growth and employment, through multi-stakeholder collaboration, technology to support travel destination development, and joint research on key industry topics. In line with these common objectives, we supported the ETC’s 70th anniversary meeting in 2018 in Belgium, with a presentation on the role of new technologies in destination management.

Institutional relationships in key markets

Amadeus engages with chambers of commerce to contribute to the economic, social and technological development of several markets around the world. This allows us to build strong institutional relationships and strengthen stakeholder networks in key markets. In addition, chambers of commerce provide valuable information that is essential to understanding the key business and regulatory issues in the local market. Amadeus is a current member of the Spanish-Turkish Chamber of Commerce and Industry; the Spanish Chamber of Commerce in both South Africa and Japan; the EU Chamber of Commerce in China, Taiwan and South Africa; and the Spanish Business Council in Dubai.4
Participation in industry initiatives and events

As a trusted adviser willing to share insights and views, Amadeus is invited to participate in many sector initiatives and events across the world. We actively participate where we can make a meaningful contribution to a fact-based dialog and learn from exchanging views on factors affecting travel and tourism.

This engagement allows Amadeus to increase its visibility and build new relationships with government and industry representatives globally, while at the same time enhancing Amadeus’ profile as a leading innovative technology partner for the travel and tourism industry.

These are some examples of initiatives and events that took place in 2018.

**Discussing innovation and digitalization in aviation at the European Aviation Summit**

Under the Austrian Presidency of the Council of the European Union, Amadeus was invited to a future-oriented discussion on the best possible development of the Aviation Strategy for Europe. We participated in a roundtable on how innovation and digitalization will transform the aviation market. The 200 participants in the summit included EU Commissioner Violeta Bulc, transport ministers from Austria and other countries, members of the European Parliament, high-level representatives of the Civil Aviation Authority and the European Commission, and leading European stakeholders.

**Promoting innovation in tourism destination management with UNWTO**

As a part of our ongoing collaboration with UNWTO to work toward a sustainable tourism industry leveraging innovation, digital capabilities and big data, Amadeus contributed to the second World Conference on Smart Destinations organized by UNWTO, SEGITTUR and the Principality of Asturias in Oviedo in June 2018. We participated in panels about growth, digitalization and sustainability of the industry, contributed to a hackathon on sustainable tourism and produced a study for the Principality of Asturias to help it on its road to enhanced destination management.
Industry discussion on the opportunities of new technologies in tourism

Together with our partner Pacific Asia Travel Association, Amadeus participate in the Global Tourism Economy Forum in Macau, China, where leaders in tourism and related industries gathered to discuss the future, digitalization and opportunities in the industry. With other experts from travel companies, UNWTO, academia and governments, we shared our views on the opportunities arising from applications leveraging artificial intelligence and digital technologies in tourism.

Fostering innovation in cooperation with the French government

Amadeus is very proud to collaborate with the French government and other public stakeholders such as Business France, OUI Innov and La French Tech, as well as other industry partners, academia and public stakeholders, to foster innovation and internationalization, which are considered paramount in today’s corporate world. An example of this is Amadeus’ support of the candidacy of Sophia Antipolis to become one of the four Institutes of Artificial Intelligence promoted by the French government in 2018.

In the Middle East, Amadeus joined forces with La French Tech during the GITEX Technology Week in October 2018 at the Dubai World Trade Centre to help the travel and tourism industry move into the digital age. During the conference, visitors could explore how Amadeus is supporting airlines and airports, hotels, search engines, travel agencies and tour operators to capture the value of digital transformation.

Building a robust and sustainable travel and tourism industry in South Africa

Amadeus partnered with South Africa’s National Department of Tourism and Department of Industry and Trade to support the growing needs of the country’s travel and tourism industry, with a commitment to sustainability and inclusive growth. The partnership aims to develop several programs, including a National Tourism Visitor Information System and a Travel and Tourism Training Academy. The aim is to drive inclusive and transformational growth with a new online platform through which South Africa can develop and commercialize an expanded tourism offering, curate and analyze tourism data for valuable insights into the services and business needs of industry players, and better service the needs of visitors. With a special emphasis on the skills that the travel industry requires, and the use of digital and virtual training facilities, the active involvement of the industry in the Travel and Tourism Training Academy will ensure that training leads to employability or employment for young South Africans, with a special focus on women. It will also bring much-needed professional skills and technology solutions to boost SMEs in the tourism sector, especially in rural areas.

Industry collaboration to leverage biometrics in travel and tourism

Amadeus has participated in an industry working group on biometric identification in travel and tourism led by WTTC. The new technology offers a significant opportunity to improve the traveler experience, maximize the growth opportunity in travel and tourism and increase security and make traveling easier. Through the Seamless Traveller Journey program, WTTC’s goal, in line with existing initiatives in this area, is to encourage the use of biometric technology and digital identity throughout the wider travel and tourism ecosystem so travelers can enjoy a seamless, secure and efficient end-to-end journey. Within the working group, Amadeus highlighted the need for industry interoperability, technological independence, a global standards framework and a managed, consumer-centric approach.

Recognition for our efforts in fostering start-ups

In 2018 Amadeus was delighted to earn recognition from the European Commission’s Startup Europe Partnership initiative for our efforts in partnering with and nurturing start-ups. For the first time, Amadeus was included in the ranking of the 36 companies working collaboratively with start-ups across Europe, and we received the Open Innovation Innovative Approach Award. In recognition of our various start-up initiatives, Amadeus was nominated by European start-ups tasked with identifying players that have gone the extra mile to establish beneficial partnerships.