

Chapter 12

Industry and government affairs



2025 saw the global landscape being defined by multipolar tensions, rising digital sovereignty, and a security-first approach to technology, trade and defense.

Western-led institutions no longer dominated unchallenged, as Europe, the US, China and emerging powers competed in a fragmented environment. The EU sought greater strategic autonomy while remaining tied to both the US and China. Other key actors, from India and ASEAN countries to African powers, started to assert greater influence, reshaping traditional geopolitical blocs. Security risks intensified, shaping foreign and domestic policies. The protracted war in Ukraine kept NATO on alert and imposed severe economic burdens on EU Member States, while declining US funding for Ukraine further hindered the country's recovery. The conflict in Israel remained intense and destructive, with wider regional effects, and multiple crises across Africa, Asia and Latin America drove global instability.

Governments tightened their oversight of critical infrastructure, strategic industries and emerging technologies. Protectionism and the pursuit of resilience became increasingly aligned with national security priorities, influencing investments, industrial policies and international cooperation. Digital sovereignty and geoeconomic frictions became defining pillars of the global order. The EU accelerated efforts to reduce reliance on non-European tech providers, aiming to make major investments in semiconductors, cloud and AI. It also advanced its digital sovereignty agenda, which enforces trusted-cloud requirements and controls over foreign digital infrastructure, promotes European

data spaces, and incentivizes home-grown AI ecosystems to reduce dependence on US and Chinese platforms.

These efforts diverged from the US's innovation-driven approach, heightened by US tariffs on European goods and EU scrutiny of American tech firms, and were accompanied by adjustments to the EU's sustainability agenda to better balance environmental goals with industrial competitiveness. To hedge against geopolitical risks, the EU diversified its external partnerships, deepened its engagement with South America (Mercosur agreement) and negotiated new trade and digital agreements across Asia.

Globally, 2025 saw governments reframing their economic policies through a security lens, tightening investment screening, mobilizing public funds for strategic industries, and treating emerging technologies like data, AI and cloud as core components of national sovereignty.

In this shifting landscape, Amadeus Industry and Government Affairs collaborates with public authorities, trade associations and global partners across the travel and digital ecosystems at global, regional and national level to shape public policies and promote smart regulations responsive to emerging challenges and aligned with business needs.



Working together with public and private stakeholders



Governments and regional institutions are increasingly expanding their influence, on digitalization, transport, tourism trade, and sustainability.

Our approach to industry engagement

Key principles

- Collaboration and broad engagement
- Innovation and technological development
- Fact-based analysis
- Transparency and fair competition

Priority areas

- Collaborative digital policy
- Open and free global digital trade
- Legal certainty
- Industry standards
- Industry sustainability and environmental performance
- Fair competition and market access

Simplifying Europe's digital landscape for competitiveness

In 2025, the EU placed competitiveness at the core of its strategic agenda, recognizing that long-term prosperity depends on its capacity to innovate, boost productivity, and attract investment.

The Letta¹ and Draghi² Reports highlighted that the EU is still not fully on track in key areas of digital adoption, particularly advanced technologies such as AI. Policymakers increasingly acknowledge the need for a simpler, clearer, and more predictable regulatory framework that enables companies to scale innovative solutions across the Single Market while supporting openness and industrial resilience.

Amadeus welcomes the EU Commission's Digital Omnibus Package,³ a cross-sectoral effort to streamline the EU's digital rulebook and reduce regulatory overlaps. After years of intensifying regulatory demands and growing geopolitical uncertainty, this renewed focus on competitiveness, innovation, and sustainable growth strengthens the Single Market, supports innovation, and balances protection with openness. In this context, Amadeus commissioned from the Florence School of Regulation the study "*Simplifying EU Digital Regulation: Ten Measures for More*

Competitive Smart Transport in Europe."

The study proposes 10 practical measures to simplify and modernize the EU's digital regulatory framework for transport and mobility, targeting three core objectives: reducing compliance burden, increasing legal certainty, and reinforcing competitiveness, while enabling European businesses to scale effectively, foster innovation, and maximize their strategic impact.

To achieve these objectives, Europe must continue shaping the digital economy through an open and ambitious trade agenda, enabling European tech companies to compete globally. Building on this framework, Amadeus Industry and Government Affairs has closely monitored digital regulation trends and actively participated in discussions to shape the evolving digital landscape alongside industry peers. To this end, Amadeus engages in multiple initiatives with the EU and Member States on digital-related topics, reinforcing simplification and competitiveness while contributing to streamlined implementation, stronger industrial ecosystems, and a predictable, innovation-friendly environment that allows companies to scale, invest, compete globally and support sustainable growth.

Amadeus is a member of the European Alliance on Industrial Data, Edge and Cloud, a coalition of 57 companies providing the European Commission with a roadmap for the next generation of cloud technologies and sovereign data exchange solutions.⁴

Amadeus, together with other travel industry players, leads EONA-X, the first European mobility, travel and tourism data space. In 2025, 16 participants joined the EONA-X ecosystem using Amadeus technology and Connector-as-a-Service operated by Amadeus. Amadeus also contributes to DeployTour, the EU Commission-sponsored tourism data space.

1. Enrico Letta (April 2024). Much More than a Market: Speed, Security, Solidarity: Empowering the Single Market to Deliver a Sustainable Future and Prosperity for All EU Citizens.

2. Mario Draghi (September 2024). The Future of European Competitiveness: A Competitiveness Strategy for Europe.

3. Brussels, 19.11.2025, COM(2025) 837 final, 2025/0360 (COD), Proposal for a Regulation of the European Parliament and of the Council.

4. European Commission (February 2020). "A European strategy for data."

Amadeus participates in the Travel Wise consortium, funded by the EU, SESAR (Single European Sky ATM Research) and EU-Rail, to improve air-rail data sharing and disruption management. Amadeus contributes by facilitating information exchange through EONA-X and by providing a design for a future-proof solution for re-accommodating passengers across air and rail.

Amadeus participated in the EU Digital Identity Wallet Consortium, a large-scale pilot with over 60 partners, focused on interoperability and promoting the adoption of the European Digital Identity Wallet in the travel sector. Amadeus is also joining the new Aptitude consortium, a European alliance coordinated by France's National Agency for Secure Documents and including 11 EU Member States and Ukraine, collaborating to develop the European Digital Identity Wallet.

Amadeus is participating in the Important Project of Common European Interest (IPCEI) on Next-Generation Cloud Infrastructure and Services, with two projects: a French-funded data exchange platform powering sectoral data spaces, and the German-funded Resilient Cloud for Europe Program (RESCUE Program), aimed at creating a cloud-hosted digital twin of our Data Center in Erding. Building on these two projects, Amadeus is preparing a proposal for the next IPCEI focused on AI.

GRI 2-16

GRI 3-3 (Political engagement and lobbying)

Advancing a seamless, secure and open EU transport ecosystem

Enhancing the EU Single Market is essential for competitiveness and resilience, with the digital transport and mobility ecosystem playing a pivotal role. Initiatives such as the Trans-European Transport Network (TEN-T) and Multimodal Digital Mobility Services (MDMS) aim to build a digitalized mobility union with integrated multimodal information, ticketing and payment services. This will enable smarter travel choices, reduce congestion and emissions, and support more sustainable mobility across Europe. Although significant sector-led progress has been made, a consistent regulatory framework is still needed to guarantee interoperability, data portability and seamless cross-border services.

New technologies such as biometric authentication and advanced digital identity solutions can further enhance efficiency and the passenger experience by enabling secure, seamless travel. But regulatory compliance uncertainty surrounding the implementation of these technologies might impact the deployment and scaling up of these initiatives at EU level, thus damaging competitiveness and innovation. EU sector-specific rules, such as the new EU Entry/Exit System (EES) Regulation, demonstrate that biometrics can be used safely, underscoring the need for balanced, evidence-based approaches that safeguard privacy while supporting innovation and competitiveness.

A harmonized EU strategy for digital mobility will create a connected, secure and sustainable market, boost innovation and competitiveness, and benefit citizens and businesses.

Expanding Amadeus' presence in strategic markets

Amadeus is a global leader in digitalizing the travel ecosystem, investing significantly in R&D and local talent to support projects worldwide. Our Industry and Government Affairs team engages globally with governments, public entities and trade associations to enhance Amadeus' reputation, competitiveness and sustainability in strategic markets.

In 2025 the Amadeus R&D Center in Istanbul strengthened Amadeus' presence in Türkiye through strategic initiatives and stakeholder engagement. Key actions included launching the Amadeus Vision for Türkiye's Next Era of Growth roadmap for travel and transport digitalization, presented at a DEİK event, and deepening political ties by hosting Spain's trade minister and joining the Turkish Vice Presidency's Investment Advisory Committee, reinforcing Amadeus' commitment to Türkiye's digital transformation and competitiveness.

Saudi Arabia continues to advance its Saudi Vision 2030 program, prioritizing travel and tourism to diversify its economy. Amadeus established new regional headquarters in the country, supporting this initiative and the expected sector growth. This new milestone, combined with further engagements with government stakeholders, has elevated Amadeus' profile and triggered new opportunities with the Ministry of Tourism, the Ministry of Hajj, and Matarat Holding (owner of Saudi airports).

Across Asia-Pacific we've strengthened our public affairs presence by closely tracking regulatory and policy developments in China, Indonesia, Japan, South Korea, Thailand and

Vietnam, and by expanding our visibility on evolving requirements in data governance, cloud operations, cybersecurity and digital competition across the region. In India we've joined the Data Security Council of India (DSCI) and continued our engagement with the National Association of Software and Service Companies (NASSCOM) and key events like the Indian B20 Digital Transformation Task Force and the India-Spain Forum.

We've also reinforced our institutional presence in the US through new memberships with the US Chamber of Commerce, the Business Software Alliance (BSA) and AmChamSpain, alongside historical participation in TravelTech. Additional lines of engagement have been developed with other key stakeholders including the US Transportation Security Administration (TSA), the US Senate and the World Bank to better monitor and understand US policy and regulatory developments, as well as emerging trends and partnerships in the evolving geopolitical landscape.

Amadeus and the International Civil Aviation Organization (ICAO) formalized a Memorandum of Understanding (MoU) supporting ICAO's No Country Left Behind (NCLB) initiative. The partnership aims to strengthen countries' ability to adopt advanced digital technologies that enhance the efficiency, safety and sustainability of international air transport.

Amadeus actively participates in chambers of commerce, including the US Chamber of Commerce and the Italy-Spain, Thailand-Spain, Türkiye-Spain, UAE-Spain and France-Türkiye chambers of commerce. This involvement enhances our institutional presence and visibility and supports the digital transformation of the travel and tourism industries.

Advancing the future of travel and tourism through strategic partnerships

Amadeus works closely with travel and tourism associations to promote policies that support the principles of sustainability, innovation and fair competition.

Our engagement with the International Air Transport Association (IATA) plays a crucial role in shaping the airline industry's future. Through active participation in IATA working groups, Amadeus contributes to the development of new standards and best practices that improve airline operations and the customer experience. By providing strategic guidance and fostering collaboration, we help drive industry-wide innovation, ensuring that evolving standards align with airline and passenger needs. We're also a key presenter at the IATA Airline Retailing Consortium—an initiative that brings together leading airlines and technology providers to accelerate the industry's transition to a modern, streamlined approach to flight sales and management.

Amadeus is actively involved in advancing the travel technology agenda globally through our participation in Global Travel Tech, in Europe through EU Travel Tech (EUTT), in North America through the Travel Technology Association (Travel Tech), and in Asia through the Asia Travel and Technology

GRI 2-28

GRI 3-3 (Political engagement and lobbying)



Medium-low impact



Industry Association (ATTIA).

We collaborate with the travel agency community and organizations like the World Travel Agents Associations Alliance (WTAAA) to promote transparency, fair competition and sustainable travel, alongside partnerships with regional and national associations worldwide.

In 2025 we continued our strategic partnership with UN Tourism as an affiliate member and technology partner, contributing to advanced digital transformation, innovation and investment opportunities throughout the tourism industry. Over the year, Amadeus has provided travel insights and reports for Regional Commissions across the Americas, Europe and Asia-Pacific, supporting member states in shaping tourism strategies. Additionally, we co-sponsored and served as a jury member for UN Tourism—led projects targeting startups and SMEs. Initiatives like the AI Global Challenge (supporting scaleups and startups developing AI solutions for travel and tourism) and the Social Innovation Challenge (encouraging entrepreneurs to promote sustainability) were established to stimulate innovation, investment and sustainable growth in the sector.

As a member of the World Travel and Tourism Council (WTTTC), Amadeus contributed to discussions shaping strategic innovation and a sustainable future for travel and tourism.



Empowering digital innovation and free trade via industry associations

Beyond travel and tourism, Amadeus actively engages in digital and industry associations to advance the digital agenda and foster technology and trade innovation. Through these strategic collaborations, we address shared challenges, promote sustainable growth and support beneficial policies.

Amadeus is a member of the Spanish Confederation of Business Organizations

(CEOE) and Adigital, the Spanish Association of the Digital Economy, contributing to public policies and engaging with key stakeholders on relevant issues.

In France, Amadeus is member of Numeum, representing over 2,500 digital ecosystem companies, and of Cigref, representing over 150 major French companies and public administrations using digital services.

In Germany Amadeus is a member of Bitkom, representing over 2,200 digital economy companies.

Amadeus is also a member of the Business Software Alliance (BSA), a global trade association that promotes a safe, legal digital world while fostering innovation and investment in the software sector.

Mapping of Amadeus stakeholders in the travel and digital industry

Global institutions and organizations

- **OECD:** Organisation for Economic Co-operation and Development
- **BIAC:** Business at OECD
- **B20:** The Business 20
- **UN Tourism:** United Nations World Tourism Organization
- **ICAO:** International Civil Aviation Organization
- **WTTC:** World Travel and Tourism Council
- **Travalyst**
- **Global Travel Tech**

Industry associations

Travel/tourism



Airlines

- **IATA:** International Air Transport Association
- **ERA:** European Regions Airline Association
- **A4E:** Airlines4Europe
- **ALTA:** Latin American and Caribbean Air Transport Association



Travel agencies

- **ECTAA:** European Travel Agents' and Tour Operators' Association
- **ASTA:** American Society of Travel Advisors
- National travel agencies associations



Corporations

- **GBTA:** Global Business Travel Association
- **BT4E:** Business Travel for Europe
- National business travel associations



Airports

- **ACI:** Airports Council International



Consumers

- **EPF:** European Passengers' Federation
- **BEUC:** European Consumer Organisation
- National consumer associations

Digital/tech

- **BSA:** Business Software Alliance
- **Adigital:** Spanish Association for the Digital Economy
- **Numeum:** Organization of the digital ecosystem in France
- **Cigref:** IT club of major French companies
- **Bitkom:** Germany's digital association
- **NASSCOM:** Nonprofit organization for the Indian technology sector
- **DSCI:** Data Security Council of India

Trade

- **CEOE:** Spanish Confederation of Business Organizations
- **Medef:** Network of entrepreneurs in France
- Chambers of commerce

GRI 2-28

GRI 3-3 (Political engagement and lobbying)