



Amadeus and TCS Join Forces





THE FACTS

On 19 March Amadeus and Tata Consultancy Services (TCS) announced a partnership “to accelerate transformation across the travel technology space”.

THE ANALYSIS

Amadeus is by far the largest provider of commercial IT systems to the world’s airlines with a market share of around 46% by volume between its two offerings. TCS is by far the largest of the IT services companies that have developed in India over the last fifty years and is responsible for around 25% of India’s IT services exports. On the face of it they are natural partners with complementary offerings.

The announcement from Amadeus says that the partnership with TCS will “span multiple areas of business, including airlines, hospitality, airports, payments, and distribution”. However the concrete example given is the support of implementation of Amadeus Nevio at multiple airlines. This represents astute positioning as Amadeus currently provides PSS to 117 airlines from its Altea suite and a further 57 that use Navitaire NewSkies. If all of these airlines were to commit to Nevio, or the Navitaire OOSD product, Stratos, over the next decade, and each project ran for two years, there would be 35 active migration projects taking place at any one time. The move to OOSD represents far more than a technology upgrade as it will require significant restructuring of airline commercial and even operational processes. Amadeus itself would not be able to provide implementation and integration support for those projects and will need support from an organisation with deep resources. With over 600,000 staff TCS should be well placed to supply a great deal of that support.

THE SPECULATION

TCS is not the only company that will seek to work with Amadeus on the implementation of Nevio. Other systems integrators such as LTIMindtree (LTM) have long-standing relationships with Amadeus. Accenture too has a partnership that has been instrumental in the implementation of the existing Altea PSS since it was formed in 2015 when Amadeus



acquired Accenture's Navitaire subsidiary. It would be surprising if the Accenture relationship did not expand into the Nevio roll-out.

Other companies such as Coforge and Infosys also have extensive and relevant experience and will certainly be seeking opportunities in the industry move to OOSD. They will compete for the business of airlines making the change as will longer established western providers such as IBM.

While TCS has undoubtedly established a prime position by securing this agreement with Amadeus it will still need to fight for each individual airline contract against a well-resourced group of competitors. Even if Amadeus succeeds in translating its dominance of the PSS space to the new world of OOSD there will still be a dynamic market for those companies charged with making the change happen.

T2RL Travel Technology Research Ltd. (T2RL) is an independent sourcing and research company that specialises in airline technology and distribution. Based on data since the year 2000, T2RL has tracked industry trends for airlines as well as their IT providers, distribution partners, and customers, all of whom use T2RL's research to make informed business decisions to meet current and future needs. While T2RL has taken all reasonable steps to provide accurate and timely information, it is provided on an "as is" basis and is correct to the best of our knowledge as of 26 March 2026. For further information, visit our website at www.t2rl.com.