

TRAVEL DISTRIBUTION AND RETAILING UPDATES



WEEKS 47 & 48, 2025

THIS EDITION CONTAINS NEWS ON:

Avianca | British Airways | Ethiopian Airlines | Lufthansa | Riyadh Air |
United Airlines | Accelya | Amex GBT | BCD Travel | CTM | Klarna |
Sabre | Sabre Direct Pay | Spotnana | Travelport | Webjet

UNITED AND TRAVELPORT ENTER STRATEGIC PARTNERSHIP

United has expanded its distribution agreement with Travelport, introducing a collaborative airline-GDS model. The strategic partnership between the companies aims to accelerate NDC capabilities. It consists of the following:

- Early access granted to Travelport for United's NDC roadmap
- Co-development of agent/ seller features
- Dedicated resources deployed for the development of the Travelport+ retailing platform
- United's Online Booking Tool extras added to Travelport's Deem (OBT) tool: Includes pooling unused United travel credits, automatic enrolment to United MileagePlus loyalty program, and using United Jetstream amenity fund for ancillary purchases

The integration is expected to begin in Q1 2026 for initial capabilities, followed by further rollouts through the rest of the year.

United Airlines



Travelport

AVIANCA TO CENTRALIZE CONTENT DISTRIBUTION VIA EDIFACT IN 2026

In a letter to travel agencies, Avianca announced that it would be “optimizing content distribution for travel agencies” beginning 01 February 2026, by

1. ‘Centralizing distribution via EDIFACT with an additional per-coupon fee to offset higher associated cost
2. Shutting down access to Avianca NDC content to third parties certified via Avianca Sync, and
3. Maintaining access via the Avianca portal and direct connects’

Avianca’s NDC distribution evolution



APR 2022

Launch of regionally differentiated strategy with an opt-in model and a surcharge for opt-out agents



APR 2024

EDIFACT surcharge increased from 6 USD to 8 USD per coupon



2021-2023

New distribution deals signed with all three GDSs, all including distribution of NDC content



NOV 2023

Surcharge application changed to a per coupon basis rather than per fare component



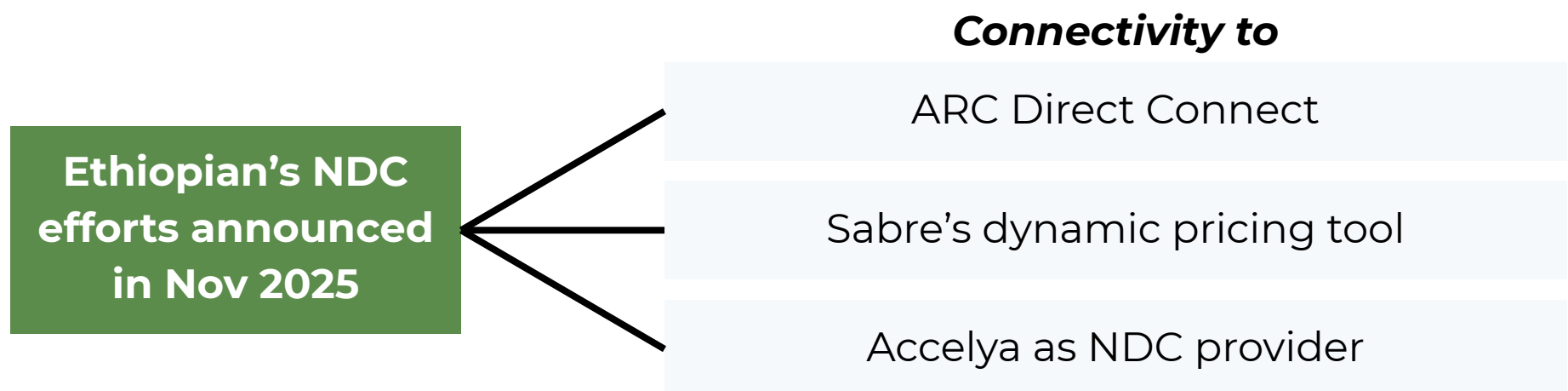
DEC 2025

Travel agents informed of strategy changes centralizing EDIFACT and limiting NDC access

ETHIOPIAN ADOPTS ACCELYA'S FLX SELECT PRODUCT

Ethiopian Airlines, Africa's leading carrier, is set to provide an NDC API using Accelya's 'FLX Select' product, which aims to provide NDC to airlines in 90 days. The product, launched in 2024, is a 'rapid-to-deploy' service for carriers seeking a standardised SaaS-like package. Out of the box, it offers desired capabilities and connectivity to several aggregators.

Recently, Ethiopian has expanded on its NDC efforts by joining ARC Direct Connect, enabling it to offer NDC in the US market through ARC's settlement services. Ethiopian Airlines has also integrated Sabre's AI-based dynamic pricing tool, SabreMosaic Airline Retailing, to 'manage the entire offer-to-order lifecycle in real time'.

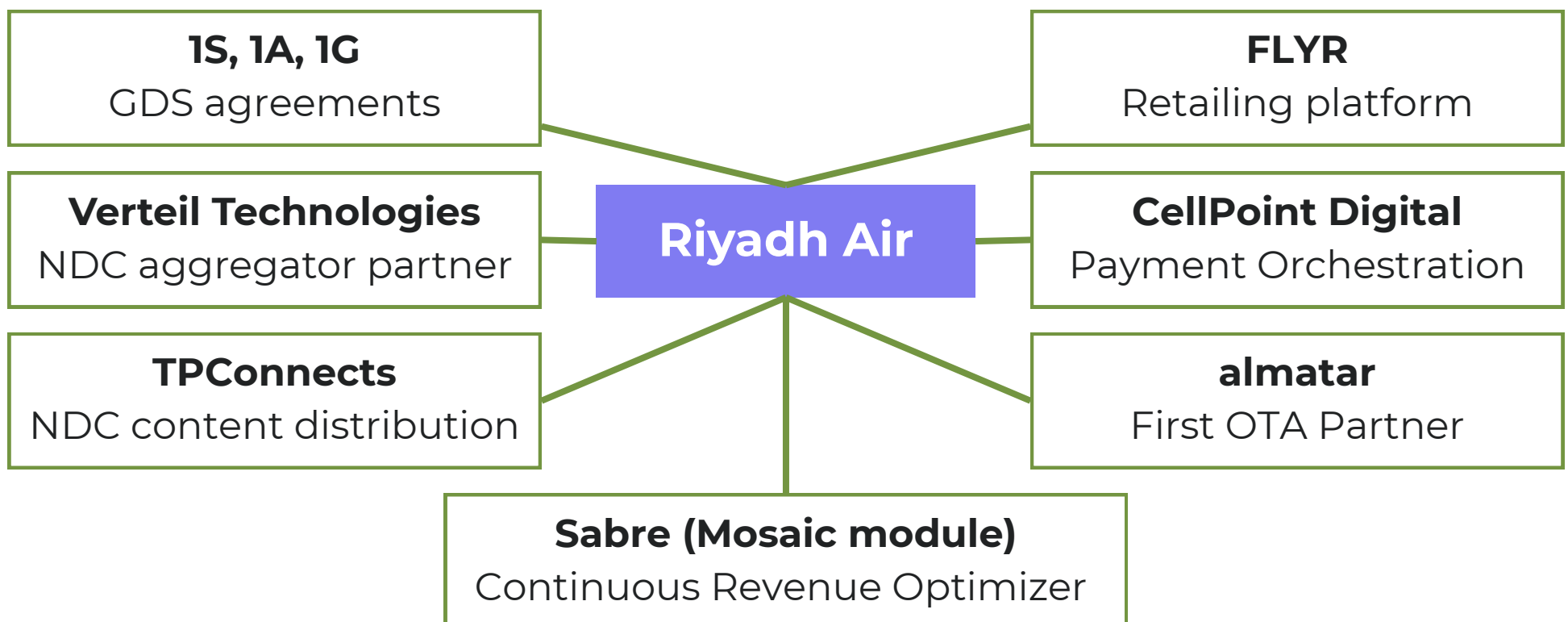


RIYADH AIR SIGNS GDS AGREEMENT WITH TRAVELPORT

Riyadh Air has signed a global distribution agreement with Travelport, covering access to both EDIFACT and NDC content. The carrier now has partnerships with all three major GDSs, following its deals with Sabre and Amadeus announced earlier this year.

Ahead of launching commercial flight operations, Riyadh Air has been entering into multiple technology and commercial agreements.

Selection of Riyadh Air's technology and commercial partners



AMEX GBT CONSIDERING A POTENTIAL SALE

Amex GBT is currently considering a sale, as reported by Bloomberg, attributing it to the company's struggling performance on the stock market. Amex's current closing share price is down 16% compared to the start of the year, valued at 7.78 USD.

While no comment has been made publicly by the TMC, the news comes despite the company's positive Q3 results, a recent partnership with SAP Concur, and closing its acquisition of CWT.

Amex GBT's 2025 evolution in a nutshell



JUL 2025

Joins Accelya's NDC FastTrack programme as one of the first partners



SEPT 2025

Successful closure of CWT acquisition, 18 months after the deal was announced



MAR 2025

UK CMA clears the CWT deal to go through after a 9 month investigation



JUL 2025

US DOJ voluntarily dismisses lawsuit against Amex GBT/ CWT



OCT 2025

Amex GBT and SAP Concur enter strategic alliance for an AI-based, end-to-end T&E platform

CTM ADMITS TO OVERCHARGING UK CUSTOMERS

Corporate Travel Management, a major TMC based in Australia, has publicly come out to say that customers in the UK and Europe were overcharged to the tune of 77.6M GBP over three years. The company would be required to refund customers/ reverse revenue for the overcharged amount. CTM UK CEO Michael Healy has been suspended from November 28.

Since the issue was discovered in September, the TMC voluntarily suspended trading on the Australian Securities Exchange and has since been mandated to halt all trading.

The discovery came to light when the company changed auditors from PwC to Deloitte, and the release of its FY 2025 earnings report was delayed. KPMG has now been hired as a forensic auditor.

	2023 & 2024	2025
Reverse revenue amount (M GBP)	58.2	19.4



SABRE ANNOUNCES SWAP OPTION AND ISSUES NEW SECURED NOTES

Sabre has issued 1B USD in new secured notes due in 2029 and is offering investors the option to swap older notes that mature in 2027 and 2029 for new ones maturing in 2030. The goal is to extend its debt deadlines and strengthen liquidity as part of a wider balance sheet cleanup and refinancing efforts.

Earlier this year, Sabre announced plans to raise 975 million USD through a private offering of senior secured notes via its subsidiary, Sabre GLBL. The proceeds primarily went to refinancing existing debt, including early repayment of a 2028 term loan.

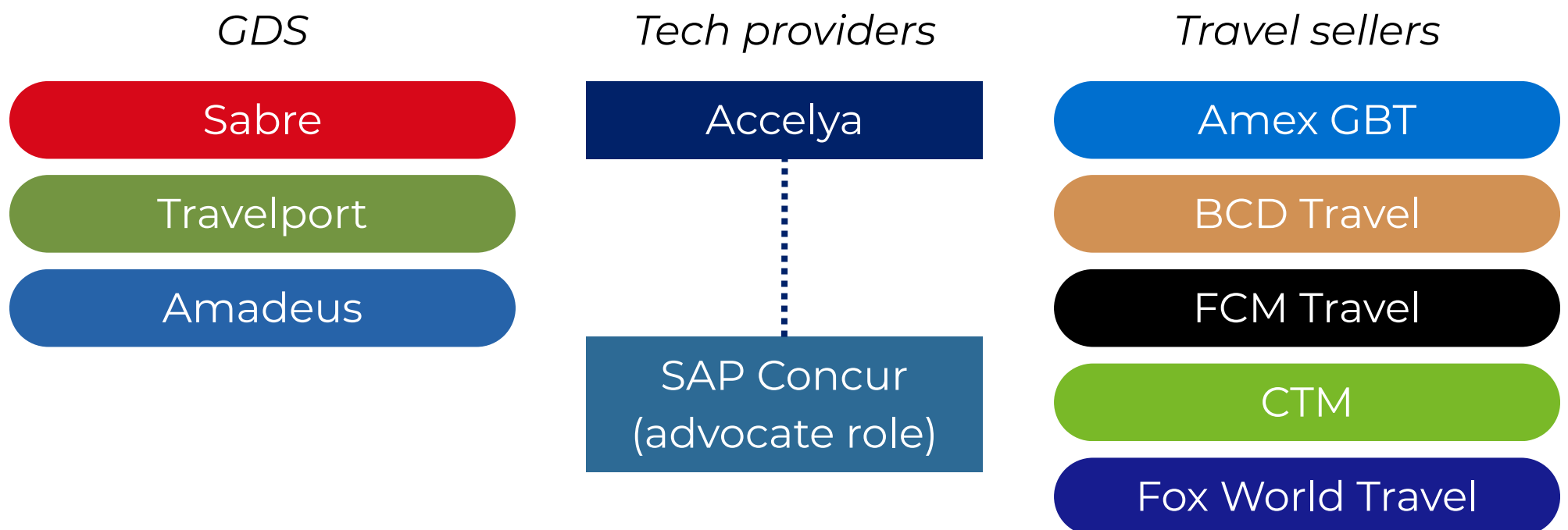
The announcement also follows Sabre's 2025 sale of its Hospitality Solutions business to TPG for 1.1 billion USD (960 million USD net) and the sale of its corporate self-booking tool to Serko for 12 million USD in late 2024.

MORE INDUSTRY MEMBERS JOIN ACCELYA'S NDC FASTTRACK

FCM Travel, CTM, Fox World Travel, and Amadeus have joined Accelya's NDC FastTrack, a program focused on accelerating NDC adoption. The initiative was launched in July 2025, with Sabre and Amex GBT as the first members, and SAP Concur as an advocate.

The program is not a commercial arrangement but functions as an industry working group - developing roadmaps, frameworks, and training resources to support faster, more aligned NDC adoption.

Current NDC FastTrack participants



Open by invitation to other travel sellers, technology providers, and corporate travel buyers

PAYMENT UPDATES

Lufthansa has signed a deal with digital bank **Klarna** and **Adyen**, a fintech provider. The integration is targeted to be expanded to the other group airlines by Q2 2026.

The partnership allows travellers to choose flexible payment options to 1) Pay in full now, 2) Pay lump sum later, or 3)

Financing: smaller payouts over a period of time, when booking LHG flights using Klarna. The partnership will initially be live for customers in 10 markets.

Sabre Direct Pay and **Juspay** have entered a strategic agreement. Juspay is an enterprise payments solutions provider enabling travel payments. Earlier this year, Juspay also entered a partnership to be integrated with Amadeus's Outpayce Xchange Payments Platform.

MORE INDUSTRY UPDATES

BCD Travel has gone live with NDC content from **British Airways (BA)**. The TMC now has 54 NDC airline agreements, with 22 connections connections live by the end of 2025.

Other BA NDC efforts in 2025 include integrating NDC content on Spotnana and going-live with NDC on Sabre.

Helloworld has announced a bid to wholly acquire OTA, **Webjet**. Currently Helloworld holds a 17% share in Webjet, with the bid offering to take over the remaining 83% shares. The offer will now undergo regulatory and internal review.

Spotnana has integrated with **Booking.com's** API, enabling users to book and service Booking.com content, including fares and exclusive benefits.



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- Audits that offer airlines solutions to specific problems in GDS and NDC distribution
- Offer-Order transformation approach

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