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British Airways and the End of the NDC Dream

July 2026



THE FACTS

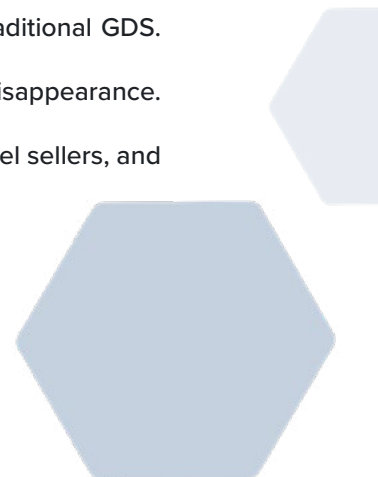
On 2 July, industry consultant Timothy O’Neil-Dunne published an [opinion piece](#) regarding British Airways’ (BA) announcement that it would sunset its in-house NDC platform and move to Amadeus for NDC. The airline had already announced plans to migrate to Amadeus for wider retailing capabilities.

THE ANALYSIS

O’Neil-Dunne maintains that BA’s adoption of Amadeus for NDC is a symbolic defeat for the original ambitions of the program. T2RL agrees with many of his observations. If those working in airline commerce in 2012 were asked whether they were happy with the state of NDC today, most would answer “no”. Does that mean the industry has utterly failed? T2RL would argue “no”.

To evaluate NDC’s success, it is worth recalling its objectives. Originally, NDC aimed to enable airlines to create the same type of rich content and tailored offers in the indirect channel as they could on their websites. However, when NDC was being formalized it was against a backdrop of negative relationships between some major airlines and GDSs, in particular bitter legal conflict between [American Airlines and Sabre](#) and [Lufthansa and Amadeus](#). As a result, many turned to NDC as a way to challenge the status quo. By 2012, to “increase competition” was another stated aim of the program.

Some airlines in particular saw NDC as a way to undermine the influence of the traditional GDS. While T2RL did not share that view, some stakeholders went so far as to anticipate its disappearance. However, as T2RL predicted, the GDS’s commercial reach, deep integration with travel sellers, and global scale had always made that an unlikely outcome.



It is fair to maintain NDC execution has been suboptimal. Complaints include:

- Getting to a standard that all parties believe is workable has taken over a decade
- Stakeholders, such as travel sellers and corporate customers, were promised benefits such as personalised offers and unique content, that have largely not materialised, not because of an API failure but because airlines have been slow to invest in the technology to enable it
- Smaller vendors have invested in end-to-end retailing technology, the market for this has failed to materialise at scale.

O'Neil-Dunne argues that IATA has failed in its role as the industry's standards custodian. While it is fair to question IATA's effectiveness, T2RL believes the lacklustre execution reflects a broader industry failure. As a trade association representing more than 370 airlines, IATA was constrained from the start. It cannot intervene in commercial or procurement decisions; it can only set policy, educate, and influence. It must also reconcile the needs of different stakeholders. Some participants wanted a tighter standard where others wanted to protect airline flexibility; some were focused on designing a modern retailing standard whereas others wanted to ensure all previous airline/GDS workflows were translated into XML.

Perhaps the most surprising aspect of BA turning to Amadeus for both distribution and core IT is that it seems to be returning to the situation it, and many others, were against: vendor lock-in, a double-sided GDS/PSS business model, and lack of choice. But today is not the early 2010s. The market has changed. And for some, that is the real success story of NDC.

There is variety in distribution models today, and airlines such as the big three in Europe, LATAM, and Qantas have significant flexibility in their GDS deals. Copa Airlines and Aegean have been able to punch above their weight and execute innovative retailing and distribution strategies. Many airlines, notably Delta, continue to treat GDSs as their primary distribution platform, whether through EDIFACT or NDC. The best approach varies depending on the airline. What matters is that airlines now have more potential options.

On the technology side, vendors such as Amadeus and Sabre are now building for modularity. In

principle, airlines can replace individual components with alternative providers for commercial or functional reasons. There is, however, an important caveat: where there is a way does not mean there is a will.

To mitigate the risk of working with market giants such as Amadeus (which T2RL data shows controls almost 46% of the PSS market when combined with Amadeus Navitaire), airlines must ensure procurement contracts include explicit rights for third-party provider integration.

THE SPECULATION

The current market share of NDC bookings tracked by T2RL has Accelya first, In-house NDC API second, and Amadeus third, although Amadeus has the highest number of airlines contracted, and this move will increase their market share. It is possible that more in-house airlines will shift to a third-party provider, and we may very well see more airlines choosing the NDC API as from their primary technology vendor. Airlines that are starting out with NDC certainly have options and there are many airlines still making decisions in this space. The importance of modularity and openness should not be underestimated. There are significant revenue and cost implications at stake and given that changing an NDC API with a lot of connections is likely to be a multi-year process, it is a critical strategic procurement decision to get right.





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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 18 June 2026. For further information, visit our website at www.t2rl.com.