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The 2026 TMC:
From Fulfillment Engine to Enterprise Travel Orchestrator

A strategic perspective on re-architecting managed travel for a real-time, experience-led world

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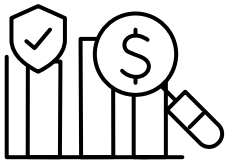
Executive Summary

Corporate travel in 2026 is no longer a fulfillment problem; it is a real-time orchestration challenge. The traditional Travel Management Company (TMC) framework — built on call centers, Global Distribution System (GDS) infrastructure and static policy enforcement — has reached its structural limits.

The future belongs to TMCs that can evolve into what we term **Enterprise Travel Orchestrators**: Platforms that unify policy, risk management, content aggregation and servicing into a seamless, intelligent system.

This transformation is driven by five interconnected forces re-shaping the managed travel landscape:



1

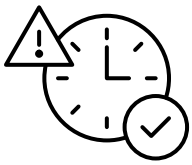
Policy + Personalization as the New Value Currency: The ability to embed intelligent policy guidance while delivering personalized recommendations will differentiate market leaders from laggards.

2

Content Fragmentation Shifting Competition from Display to Service: As content sources proliferate (New Distribution Capability (NDC), direct connects, Low-Cost Carriers (LCC)), competitive advantage shifts from what you show to how well you service it.

3

Agent Workforce Capacity as the Critical Bottleneck: With simple tasks moving to self-service and remaining cases growing in complexity, TMCs must re-design workforce models around AI-augmented agents.



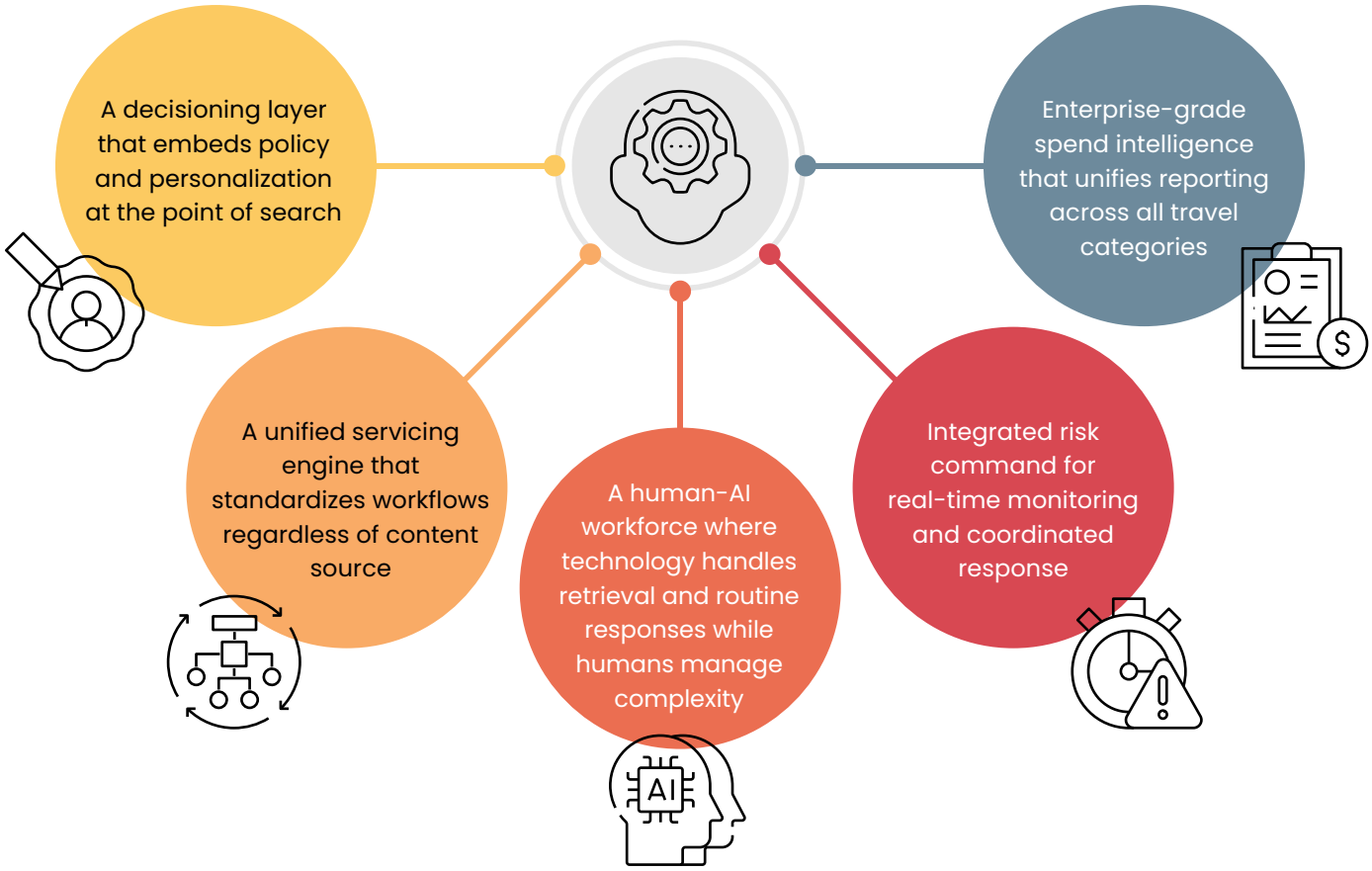
4

Duty of Care Maturing into Real-time Risk Orchestration: Enterprises now expect anticipation, communication and coordinated action — not just traveler tracking — with audit-ready records of incident response.

5

Meetings & Groups Re-emerging as Strategic Spend Levers: After years of decentralization, organizations are re-centralizing meeting spend, creating a major opportunity for TMCs to own end-to-end governance.

These forces collectively re-define what a TMC must be. The next-generation model is defined by five foundational capabilities:



The Transformation Challenge

Building these capabilities exposes a structural gap few TMCs can address internally — combining deep operational expertise in managing complex, global service delivery with advanced technology transformation. The most successful transformations we observe pair domain knowledge — understanding the nuances of GDS workflows, content servicing, policy engines and traveler behavior — with modern technology architecture, AI implementation experience and the ability to execute large-scale change programs without disrupting current operations.

For TMC executives, 2026 is not a year of incremental improvement. It is a structural re-shaping of the business model. Those that approach this transformation with both travel domain depth and enterprise technology capabilities will outpace competitors still trying to build internally or working with partners who lack one dimension or the other.

The Changing Landscape of Corporate Travel

The managed travel industry is experiencing a fundamental shift in its operating model. What was once a linear process — search, book, ticket, service — has become a fluid, multi-stakeholder environment where competing demands must be balanced in real-time.

Three concurrent pressures define the current environment:

- Enterprise procurement teams demand greater control, measurable compliance and demonstrable ROI from travel programs.
- Travelers expect autonomy, speed and personalized experiences comparable to consumer booking platforms.
- Technology ecosystems continue to fragment, with new content sources, distribution models and service requirements emerging continuously.

Traditional TMC infrastructure — built around call centers, GDS platforms and rule-based policy enforcement — struggles to address these pressures simultaneously. The result is increasing friction: Enterprises complain about leakage and lack of visibility; travelers find managed booking tools cumbersome compared to consumer alternatives; and TMCs face rising cost-to-serve as transactions grow more complex.

The path forward requires a fundamental re-definition of the TMC's role, from transaction facilitator to enterprise travel orchestrator.

Force 1:

Policy + Personalization as the New Value Currency

The Shift

The managed travel value proposition is undergoing a critical transformation. For decades, TMCs competed primarily on content access, transaction efficiency and cost savings. Today, the differentiator is the ability to influence decisions before transactions occur, combining rigorous policy enforcement with intelligent personalization.

This shift reflects a fundamental tension in corporate travel programs: Procurement departments need control and compliance, while travelers demand autonomy and relevance. The TMC becomes the critical bridge that makes both possible, but only if it can seamlessly embed policy intelligence into the traveler experience.

Why This Matters Now

Traveler Expectations
Business travelers increasingly expect recommendation engines comparable to consumer platforms, tailored to their preferences, past behavior and real-time context. Generic policy messages and undifferentiated search results feel dated and frustrating.

Enterprise Requirements
Companies want policy embedded invisibly into the booking flow. Rather than blocking out-of-policy options or forcing travelers through exception workflows, leading programs use intelligent nudging — highlighting preferred options, explaining why certain choices save money or reduce risk, and making compliance the path of least resistance.

Pre-Transaction Influence
The highest-value interventions happen before money is spent. TMCs that can shape decisions at the search and comparison stage — through personalized recommendations, contextual policy guidance and intelligent defaults — drive better outcomes than those that simply enforce rules post-booking.

What This Requires

A sophisticated policy-personalization engine is difficult to build, requiring capabilities that span travel operations and modern technology. The policy logic must reflect a deep understanding of how corporate travel programs actually work — approval hierarchies, exception handling, traveler segmentation and preferred supplier relationships. But the delivery mechanism demands real-time decisioning engines, machine learning models that learn from traveler behavior, A/B testing frameworks to optimize messaging and seamless integration with booking platforms.

Successful implementations we've observed share common characteristics: They're built by teams that understand both the operational complexity of managed travel and the technical architecture of modern recommendation systems. Pure technology teams struggle with business logic; pure operations teams struggle with scalable implementation.

Executive Implication

TMCs that successfully combine policy intelligence with personalization capability will:

Shape traveler decisions earlier in the booking journey.

Improve policy compliance organically, without heavy-handed enforcement.

Deliver measurable enterprise value while maintaining high traveler satisfaction.

Create competitive differentiation that is difficult to replicate.

This is no longer a differentiator; it is table stakes. The question is not whether to build it, but how to build it effectively, which requires partners who bring both expertise dimensions.

Force 2:

Content Fragmentation: The Battle Moves from Display to Service

The Shift

Content availability is no longer a competitive differentiator. Air, hotel, rail, ground transportation, NDC connections, direct airline integrations and low-cost carriers — options are everywhere. The challenge has shifted from access to consistency and serviceability.

While many platforms can display diverse content, very few can service it cleanly. This gap is widening as post-booking complexity increases: Changes, cancellations, refunds, disruption management and ancillary services all vary by content source. The result is workflow fragmentation, inconsistent service quality and escalating cost-to-serve.

Why This Matters Now

Post-booking work is surging

Travel volatility — driven by operational disruptions, policy changes and traveler flexibility demands — means that changes, cancellations and re-booking now represent a substantial portion of TMC workload. Each content source has different rules, technical requirements and service protocols.

Workflow fragmentation increases costs

When agents have to navigate different systems, rules and procedures based on booking source, productivity suffers and error rates rise. The cost-to-serve escalates as content diversity grows.

Corporate evaluation criteria are shifting

Enterprise buyers increasingly evaluate TMCs not on the breadth of content displayed, but on the quality and consistency of post-booking service. Can changes be made quickly? Are refund processes predictable? How well does the TMC handle disruptions across all content types?

What This Requires

Solving this problem requires a unified servicing layer — an abstraction that normalizes diverse content sources into consistent data models and standardized workflows. This is fundamentally an integration and orchestration challenge that sits at the intersection of travel operations expertise and modern Application Programming Interface (API) architecture.

The technical patterns are well established in other industries — adapter layers, event-driven architectures, rule engines — but applying them to travel requires intimate knowledge of GDS messaging, NDC schemas, direct-connect protocols and the operational nuances of how each supplier handles exceptions. Organizations experienced in both business process management for travel companies and enterprise integration architecture are best positioned to design and implement these systems.

Executive Implication

Future competitiveness depends on building a unified content and servicing layer that abstracts away source differences. Leading TMCs will:

Standardize change and cancellation workflows across all booking sources.

Make refund processing predictable and low-cost across all content types.

Normalize fare rules, amenities and changeability information for consistent presentation.

Reduce cost-to-serve through automation and rule-based workflows.

Building this infrastructure typically takes 12-18 months when executed by teams combining operational process knowledge with platform engineering capability. The investment is substantial but unavoidable.

Force 3:

The Agent Workforce: Capacity Becomes the Constraint

The Shift

The managed travel industry's primary constraint is no longer demand or technology; it is workforce capacity. Hiring qualified agents is expensive and time-consuming. Attrition rates remain elevated. And critically, the cases that reach agents are increasingly complex, requiring policy knowledge, empathy, judgment and mastery of multiple content formats.

Traditional productivity levers — process optimization, technology enablement, offshore operations — are reaching diminishing returns. Without a fundamental re-design of the agent workforce model, TMCs will struggle to scale service quality while managing costs.

Why This Matters Now

Simple tasks migrate to self-service

Straightforward bookings, routine itinerary lookups and basic policy questions are moving to self-service channels and automated systems. What remains in the agent queue requires higher-order skills.

Remaining cases require judgment

Complex itinerary changes, exception requests, disruption management, negotiation with suppliers and sensitive traveler situations demand empathy, creativity and deep policy understanding. These capabilities develop slowly and are difficult to train at scale.

Productivity plateaus without augmentation

Traditional efficiency improvements yield marginal gains. The next productivity step-change requires augmentation — equipping agents with AI-driven tools for information retrieval, suggesting next-best actions and drafting responses, allowing humans to focus on judgment and relationship management.

What This Requires

Deploying AI to augment travel agents sounds straightforward, but it proves challenging in practice. The systems must understand travel-specific terminology, integrate with multiple backend systems (GDS, booking tools, policy engines, Customer Relationship Management (CRM)), handle edge cases gracefully and operate across languages and regions. They must also be trained on actual TMC workflows and continuously improved based on agent feedback and quality outcomes.

The organizations succeeding with agent augmentation typically bring two things: Operational scale in managing travel contact centers globally, which provides the data and process understanding needed to train AI effectively, and AI implementation experience from deploying similar solutions in customer service environments across industries. This combination — travel operations depth plus AI deployment expertise — significantly accelerates time-to-value.

Executive Implication

TMCs must re-design their workforce model around augmented agents — consultants equipped with intelligent tools rather than transaction processors. This requires:

AI systems that provide real-time policy guidance, waiver recommendations and next-best-action prompts

Automated information retrieval that eliminates manual system navigation

Intelligent draft responses for routine communications

Accelerated onboarding and training through AI-powered coaching systems

The goal is to increase what each agent can handle while improving quality, turning workforce capacity from a constraint into a competitive advantage. Implementation timelines run 6-9 months when executed by teams familiar with both travel agent workflows and enterprise AI deployment.

Force 4:

Duty of Care Matures into Real-time Risk Orchestration

The Shift

Enterprise expectations for duty of care have evolved far beyond basic traveler tracking. The new mandate is comprehensive risk orchestration: Anticipating potential disruptions, proactively communicating with affected travelers, coordinating re-booking and support actions, and maintaining audit-ready records of all interventions.

This shift reflects growing organizational awareness that traveler wellbeing is both a moral obligation and a business imperative. Incidents that are poorly managed generate reputational damage, legal exposure and employee dissatisfaction. Conversely, strong risk management capabilities become a competitive differentiator in talent recruitment and retention.

Why This Matters Now

Operational disruptions are more frequent
Weather events, labor actions, technical failures and geopolitical developments create more frequent and severe travel disruptions. The ability to respond quickly and effectively is critical.

Audit and compliance requirements are becoming more stringent
Enterprises increasingly require time-stamped, detailed records of how risk events were identified, which travelers were affected, what communications were sent and what actions were taken. This documentation protects against legal liability and demonstrates due diligence.

Board-level visibility is increasing
In many organizations, traveler safety has become a board-level concern, particularly for companies with significant international operations. Executive leadership expects regular reporting on risk exposure and incident response effectiveness.

What This Requires

Effective risk operations require 24/7 monitoring capabilities, multi-channel communication systems, coordination protocols that mobilize resources quickly and case management platforms that track every action. The operational model mirrors critical infrastructure management in other industries — think network operations centers for telecommunications or security operations centers for IT.

TMCs building these capabilities benefit from partners experienced in operating global shared services with rigorous SLAs, combined with technology platforms built for real-time event processing and automated response orchestration. The pattern is less about travel-specific IP and more about applying proven operational and technical frameworks to a travel context.

Executive Implication

TMCs will differentiate on their ability to operate an integrated risk operations center that goes beyond location services. Requirements include:

- Real-time monitoring of global risk events with intelligent filtering based on client traveler locations
- Automated, multi-channel traveler communication (SMS, e-mail, app notifications) with escalation protocols
- Coordinated re-booking and support services across all affected travelers
- Comprehensive incident reporting with complete audit trails
- Integration with corporate security and emergency response teams

This integrated risk command capability represents a significant opportunity for TMCs to move from cost center to strategic partner in enterprise risk management. Build versus partner decisions should account for the operational maturity and technical infrastructure required to deliver 24/7 mission-critical services.

Force 5:

Meetings & Groups Re-emerging as a Strategic Spend Lever

The Shift

After years of decentralization and fragmentation, organizations are re-discovering meetings and group travel as one of the least governed and highest-opportunity categories of corporate spend. While transient travel typically operates under managed programs with clear policies and consolidated reporting, meeting spend remains scattered across business units, event planners and ad hoc arrangements.

This fragmentation creates systemic leakage, weak supplier leverage and limited visibility into total travel expenditure. For TMCs, it represents a major white space opportunity: Bring the same orchestration, governance and intelligence to meeting travel that already exists for individual bookings.

Why This Matters Now

The share of meeting-related travel spend is increasing

As companies return to in-person events, conferences and team gatherings, meeting-related travel represents an increasing share of total travel budgets — often 25-40 percent in many organizations.

Visibility gaps are driving spend leakage

Without centralized oversight, companies cannot effectively negotiate volume discounts, consolidate spending power or identify cost reduction opportunities. Individual planners often lack access to preferred rates and negotiated agreements.

Demand for integrated reporting is rising

Finance and procurement teams want unified visibility across all travel categories — transient, meetings and project-based travel. Current systems typically report these separately, making total cost analysis difficult.

What This Requires

Realizing the value of meetings and group travel requires more structured governance, tighter integration with transient travel and unified visibility across spend. It also calls for stronger alignment with procurement and finance, ensuring that sourcing, negotiation and reporting are managed with the same rigor as the broader travel program.

Executive Implication

TMCs have a significant opportunity to own end-to-end meeting travel governance, transforming a fragmented category into a strategic value driver. This requires:

Dedicated meetings and event management capabilities with specialized tools and expertise

Integrated group bookings and individual travel itineraries

Unified reporting that aggregates transient and meeting spend

Strategic sourcing that leverages total travel volume in supplier negotiations

Robust policy frameworks that bring governance to meeting travel without stifling organizational agility

The TMC that successfully integrates meetings into its core value proposition will capture significant wallet share and deepen client relationships beyond traditional transient travel management.

What Defines the Next-gen TMC Operating Model

These five forces collectively re-shape the fundamental definition of what a TMC must be. The traditional fulfillment-centric model — focused on transaction processing, content access and reactive service — cannot address the complexity and expectations of the 2026 environment.

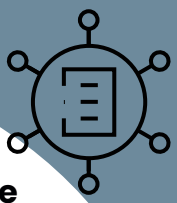
The next-generation TMC operates as an Enterprise Travel Orchestrator built on five foundational capabilities:

1. A Decisioning Layer at the Core

Rather than applying policy as a gate-keeping mechanism after search, leading TMCs embed policy intelligence and personalization directly into the decision moment. This means:

- **Real-time policy evaluation that highlights compliant options without blocking alternatives**
- **Personalized recommendations based on traveler preferences, past behavior and contextual factors**
- **Intelligent defaults that make the preferred choice the easiest choice**
- **Contextual guidance explaining why certain options deliver better value or lower risk**

Outcome: Higher policy compliance, improved traveler satisfaction and better utilization of negotiated rates — achieved through influence rather than enforcement.



2. A Unified Servicing Engine

As content sources proliferate, competitive advantage shifts to servicing consistency. Leading TMCs build standardized rules and workflows for changes, refunds and disruptions regardless of booking origin. This requires:

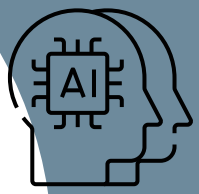
- **Abstraction layers that normalize diverse content sources into common data models**
- **Rule engines that handle change logic, fare calculations and refund processing programmatically**
- **Automated workflows that route transactions to the appropriate systems without agent intervention**
- **Exception handling protocols that escalate only true edge cases to human review**

Outcome: Predictable service delivery, lower cost-to-serve and competitive differentiation based on post-booking excellence.

3. A Human-AI Workforce

The workforce model transitions from transaction processors to augmented consultants. AI systems handle information retrieval, decision guidance and routine responses; humans focus on judgment, negotiation, empathy and complex problem-solving. Implementation requires:

- AI co-pilots that provide agents with real-time recommendations, policy interpretations and draft communications
- Knowledge management systems that make expertise instantly accessible
- Training acceleration through AI-powered onboarding and continuous coaching
- Quality monitoring that identifies improvement opportunities and shares best practices



Outcome: Higher agent productivity, faster capability development, improved service quality and scalable capacity growth.

Outcome: Enhanced traveler safety, reduced liability exposure, stronger client relationships and elevation of the TMC from vendor to strategic partner.

4. Integrated Risk Command

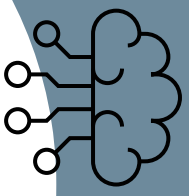
Duty of care becomes a comprehensive risk operations capability encompassing monitoring, communication, coordination and reporting. Leading TMCs establish risk command centers that provide:

- Real-time global risk monitoring with intelligent filtering by client exposure
- Automated traveler alerting across multiple communication channels
- Coordinated response protocols that mobilize resources quickly during incidents
- Comprehensive incident documentation with complete audit trails
- Integration with corporate security, HR and emergency response teams

5. Enterprise-Grade Spend Intelligence

Data capabilities expand from transactional reporting to comprehensive spend intelligence across all travel categories. This requires:

- Unified data models that aggregate transient, meetings and project travel
- Advanced analytics identifying savings opportunities, compliance gaps and policy optimization potential
- Benchmarking capabilities, comparing performance across peer organizations and industry standards
- Predictive models forecasting future spend patterns and identifying emerging risks
- Self-service analytics enabling business users to explore data without technical expertise



Outcome: Actionable insights that drive continuous program improvement, demonstrate ROI and support strategic decision-making.

The Execution Challenge: Domain Expertise Meets Technological Capability

The challenge is no longer defining the future state; it is executing it. The most effective transformations we observe combine two distinct types of expertise:

Domain Expertise: Deep Travel Operations Knowledge

Understanding how corporate travel actually works involves navigating the nuances of GDS systems, the complexity of NDC implementation, policy engine logic, agent workflow patterns, traveler behavior across cultures, supplier relationship dynamics and the operational realities of running 24/7 global service operations. This knowledge comes from years of managing travel operations at scale.

What this enables:

- Realistic process re-design that accounts for edge cases and operational constraints
- Training programs that reflect actual agent workflows and knowledge requirements
- Service-level definitions grounded in what's operationally achievable
- Change management approaches that address resistance patterns specific to travel organizations

Technology Capability: Enterprise Transformation at Scale

Experience in designing and implementing modern technology platforms requires expertise across API-first architectures, cloud-native systems, AI / ML model deployment, real-time event processing, enterprise integration patterns, data lake construction and the program management discipline to execute large transformation initiatives without disrupting ongoing operations.

What this enables:

- Scalable, maintainable architecture that can evolve with business requirements
- AI implementations that actually work in production, not just proof-of-concept environments
- Integration strategies that connect legacy systems with modern platforms without a complete rip-and-replace
- Program governance that keeps multi-year transformations on track and on budget

Why Both Are Required

We observe a consistent pattern: Transformations led purely by domain experts struggle with technology implementation: Architectures don't scale, integrations are brittle and AI deployments underperform. Conversely, transformations driven solely by technology experts miss operational nuances: Processes that look clean on paper fail in practice, training programs that seem comprehensive leave critical gaps, service metrics that appear reasonable prove unachievable.

The most successful transformations pair these capabilities from the start. Design sessions include both travel operations experts who know what needs to happen and technology architects who know how to build it. Implementation teams combine process specialists who can re-design workflows with engineers who can automate them. Change management blends operational change experts who understand agent populations with technical training specialists who can build effective learning systems.

The Partner Advantage

Often, TMCs don’t possess both dimensions internally. Building travel technology platforms while simultaneously running travel operations creates resource conflicts and focus dilution. The strategic question becomes: Which capabilities to build internally versus source through partnerships?

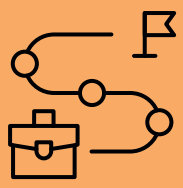
Increasingly, leading TMCs maintain core competencies in client relationships, commercial strategy and supplier negotiations while partnering for operational transformation and technology platform development. The ideal partnership combines deep travel industry operating experience — managing contact centers, handling complex servicing workflows, understanding traveler and corporate buyer needs — with proven enterprise technology transformation capability across multiple industries.

This domain-plus-technology combination accelerates transformation timelines, reduces implementation risk and allows TMC leadership to focus on competitive strategy rather than operational and technical execution.

A 90-Day Leadership Agenda for TMC Executives

Transforming a TMC from fulfillment engine to enterprise orchestrator is a multi-year journey. However, executives can initiate this transition with focused actions over the next 90 days. The following agenda prioritizes high-impact initiatives that deliver near-term results while laying the foundation for long-term capability development.

1. Re-design the Top 10 Servicing Journeys



Objective: Identify where cost, friction and inconsistency are highest in current servicing operations. Then standardize these workflows through automation and rule-based processes.

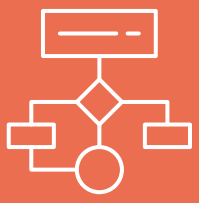
Actions:

- Analyze service case data to identify the 10 most frequent or costly servicing scenarios (e.g., simple flight changes, cancellations within 24 hours, hotel modifications, disruption re-booking).
- Map current-state workflows, documenting manual steps, system interactions, decision points and failure modes.
- Design standardized workflows with clear automation opportunities and exception handling protocols.
- Pilot re-designed workflows with a subset of agents or clients, measure impact on handle time and quality.
- Create a rollout plan for broader implementation.

Expected Outcome: 15-25 percent reduction in average handle time for targeted journeys; 20-30 percent improvement in first-contact resolution; clearer path toward full automation of routine scenarios.

Implementation Note: *This work benefits from teams experienced in both travel operations and process automation. Consider engaging partners with proven methodologies for workflow re-design in customer service environments.*

2. Build a Cross-Source Content Framework



Objective: Define how fares, rules, amenities and changeability will be normalized across all content sources to enable consistent presentation and servicing.

Actions:

- Inventory all current content sources (GDS, NDC, direct connects, aggregators) and their servicing requirements.
- Define standard data schemas for fare information, change rules, cancellation policies and ancillary services.
- Establish transformation logic to map source-specific formats into normalized schemas.
- Build a proof-of-concept demonstrating normalization across 2-3 diverse content sources.
- Document gaps where source capabilities don't align with desired standards; create mitigation strategies.

Expected Outcome: Clear architectural blueprint for content normalization; proof-of-concept demonstrating feasibility; roadmap for progressive implementation across all content sources.

Implementation Note: *This architectural work requires deep expertise in travel content protocols combined with modern API design patterns. Leverage partners with experience in building integration layers for complex, multi-source environments.*

3. Deploy AI Where It Delivers Immediate ROI

Objective: Implement AI capabilities in high-value use cases that generate rapid productivity gains and demonstrate technology value to stakeholders.

Priority Use Cases:

Agent Guidance Systems:

- Real-time policy interpretation and waiver recommendation based on case context
- Next-best-action suggestions during complex servicing scenarios
- Draft responses for common inquiries that agents can review and personalize
- Knowledge base search that surfaces relevant information based on case details

Onboarding and Training Acceleration:

- AI-powered training modules that adapt to individual learning pace and knowledge gaps
- Simulated case handling with real-time feedback
- Continuous coaching based on quality monitoring insights
- Peer comparison and best practice sharing

Implementation Approach:

- Start with a pilot team of 20-30 agents; measure baseline performance metrics.
- Deploy AI tools progressively, allowing time for adoption and feedback.
- Track impact on handle time, quality scores, agent satisfaction and training time.
- Refine based on results; expand to broader workforce.

Expected Outcome: 10-15 percent improvement in agent productivity; 30-40 percent reduction in training time for new hires; demonstrated AI value that builds organizational confidence for broader deployment.

Implementation Note: *Effective AI augmentation requires both travel-specific training data and AI deployment expertise. Look for partners who operate travel contact centers at scale and have proven AI implementation track records.*

4. Establish a Unified Case Management System for Duty of Care

Objective: Ensure all traveler interactions during risk events are trackable, escalatable and reportable with complete audit trails.

Actions:

- Evaluate current duty of care capabilities: how are risk events identified, how are affected travelers determined, how are communications tracked, how are actions documented?
- Define requirements for unified case management: Event creation, traveler identification, communication logging, action tracking, escalation workflows and reporting.
- Select or build a case management platform with the required capabilities.
- Integrate with traveler location data, communication channels (SMS, e-mail, app) and booking systems.
- Establish standard operating procedures for common risk scenarios.
- Conduct a tabletop exercise simulating a major disruption event.

Expected Outcome: Complete visibility into risk event response; audit-ready documentation of all actions; faster, more coordinated traveler support; enhanced client confidence in duty of care capabilities.

***Implementation Note**: Risk operations centers require 24/7 operational discipline and robust technical infrastructure. Consider partnerships with organizations experienced in running mission-critical, always-on services.*

5. Pilot a Meeting Travel Control Tower

Objective: Prove the value of integrated meeting travel management with one region or business unit; use results to build a case for broader expansion.

Actions:

- Select a pilot client or business unit with significant meeting volume and a willingness to test a new approach.
- Baseline current state: Total meeting spend, number of events, fragmentation across planners and visibility gaps.
- Design end-to-end meetings management workflow: Event intake, sourcing, contracting, attendee registration and travel booking, on-site support, reconciliation.
- Deploy a dedicated meeting team with appropriate tools and supplier relationships.
- Manage 3-5 events through pilot workflow; capture detailed metrics on cost savings, planner satisfaction and process efficiency.
- Document lessons learned and create a business case for expansion.

***Expected Outcome**: Demonstrated cost savings of 15-20 percent on managed events; improved visibility into meeting spend; validated operating model ready for scale; enthusiastic client reference for business development.*

Conclusion: Building the Future-Ready TMC

2026 represents an inflection point for the travel management industry. The forces re-shaping corporate travel — policy-personalization convergence, content fragmentation, workforce constraints, duty of care evolution and meeting spend recentralization — are not temporary disruptions but structural shifts that will define the industry for the next decade.

TMCs face a fundamental choice: Evolve into Enterprise Travel Orchestrators that deliver integrated intelligence, seamless service and strategic value, or remain transaction processors competing on declining margins in a commoditizing market.

Courage to acknowledge that the fulfillment-centric model has reached its limits and cannot simply be optimized for relevance

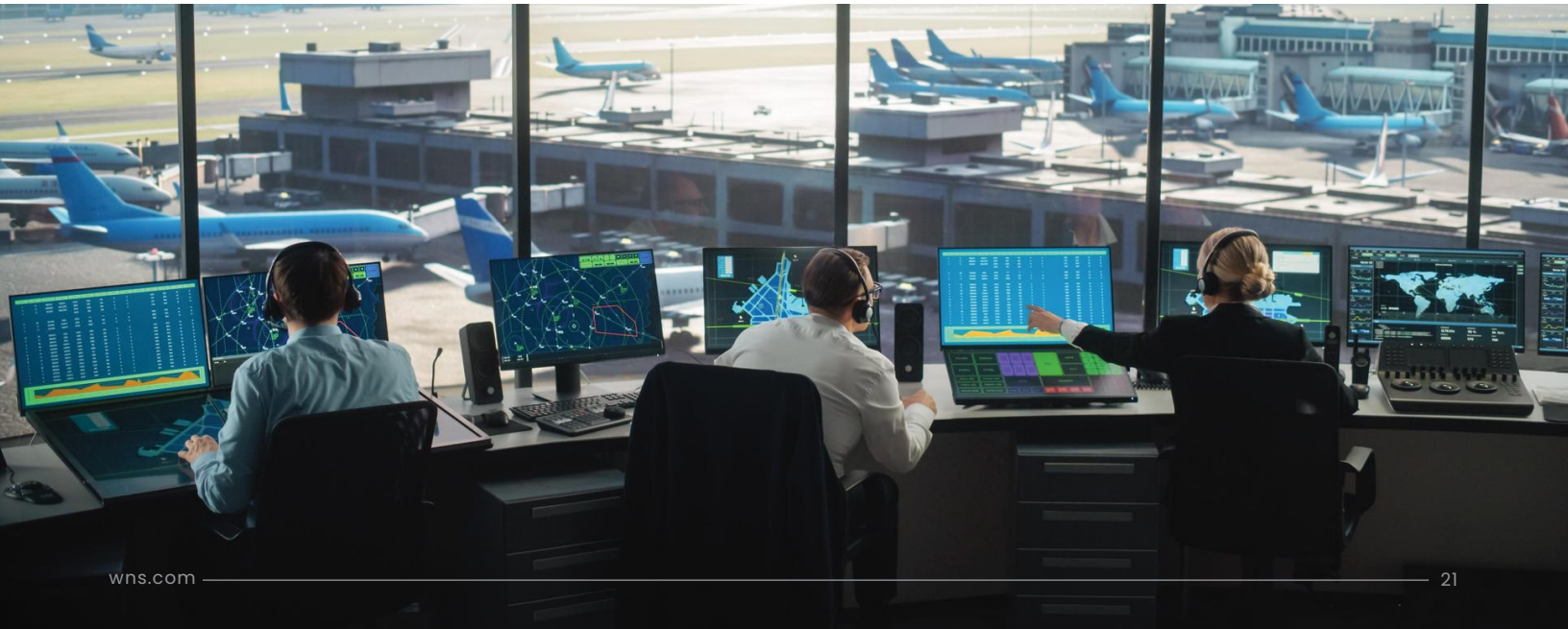
The path forward requires both courage and pragmatism:

Pragmatism to recognize that building all required capabilities internally may not be the fastest or most effective path — strategic partnerships can accelerate transformation while allowing leadership to focus on competitive strategy

The winners in this transformation will be those who move decisively to re-build their value proposition around orchestration, intelligence and partnership. Success requires both deep travel domain expertise and advanced technology transformation capability, a combination that is difficult to assemble but achievable through the right partnerships.

For executives willing to lead this transformation, the opportunity is substantial: Deeper client relationships, higher-value service offerings, more defensible competitive positions and the satisfaction of building the travel management platform that the 2026 enterprise actually needs.

The industry's future is bigger than its past — for those bold enough to seize it with the right partners at their side.



Enabling the Shift from Fulfillment to Orchestration

WNS: Deep Travel Domain Expertise

WNS, part of Capgemini, is an Agentic AI-powered intelligent operations and transformation company, with deep domain expertise in Travel & Leisure built over two decades of partnership with major TMCs, airlines, hospitality groups and online travel agencies. WNS operates travel contact centers across multiple geographies, manages complex servicing workflows for millions of travelers annually and brings operational excellence refined through managing some of the industry's most demanding service delivery requirements.

Our travel practice understands the operational realities of running managed travel programs — from GDS transaction processing and NDC integration challenges to policy engine implementation and global workforce management. This domain knowledge, combined with our analytics capabilities and process automation expertise, enables us to help TMCs transform operations while maintaining service quality and cost efficiency.

Capgemini: Enterprise Technology Transformation

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. With proven capabilities in cloud transformation, AI / ML implementation, enterprise integration, data & analytics and large-scale program management, Capgemini brings the technical depth required to build modern travel technology platforms.

Capgemini's experience spans digital transformation programs across industries, including transportation, hospitality and customer experience platforms. This cross-industry perspective brings best practices from other sectors — real-time decisioning engines from retail, risk operations centers from financial services, workforce augmentation from telecommunications — and adapts them to travel industry requirements.

The Joint Value Proposition

Together, WNS and Capgemini offer TMCs a unique combination: Deep operational expertise in managing travel services at scale, paired with proven capability in enterprise technology transformation. This partnership enables comprehensive transformation programs that address both the operational and technical dimensions of becoming an Enterprise Travel Orchestrator.

Our joint approach accelerates transformation timelines, reduces implementation risk and delivers sustainable competitive advantage. We help TMC leaders focus on strategic positioning and client relationships while we handle the complexity of operational re-design and technology platform development.

For TMC leaders, the question is no longer whether this shift will happen, but how to respond. Engage with our Travel & Leisure leadership team to explore how these forces translate into your operating model and priorities.

About WNS

WNS, part of Capgemini, is an Agentic AI-powered intelligent operations and transformation company. We combine deep domain expertise with talent, technology, and AI to co-create innovative solutions for over 700 clients across various industries. WNS delivers an entire spectrum of solutions, including industry-specific offerings, customer experience services, finance and accounting, human resources, procurement, and research and analytics to re-imagine the digital future of businesses. WNS has 66,000+ professionals across 65 delivery centers worldwide, including facilities in Canada, China, Costa Rica, India, Malaysia, the Philippines, Poland, Romania, South Africa, Sri Lanka, Turkey, the United Kingdom, and the United States.

To know more, write to us at **marketing@wns.com** or visit us at **www.wns.com**

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