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A strategic analysis of Saudia using the PEG framework

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Abstract

This paper conducts a strategic analysis of Saudia using a recent strategic framework of analysis developed specifically for air transport; that is, the politics, economics and geography (PEG) framework. The motivation to analyse Saudia stems from the ongoing doctoral research the lead author is currently carrying out which is focused on investigating the strategic trajectories of the Middle East big three (MEB3). In this study Saudia has been identified as a potential key competitor which can exert pressure on the future trajectories of the traditional big three Gulf carriers, Emirates, Etihad and Qatar. Given PEG is a novel framework developed specifically for the airline industry, and is simple and straight forward to use, it is considered a 'best fit' for Saudia, particularly when primary data about the airline is yet to be collected. Saudia is also heavily influenced by geopolitics. The analysis in this paper is structured based firstly on the category of politics, then geography and finally economics. The outcome of the first two categories demonstrates the extent to which politics and geography are more important to the airline than economics, as far as strategic direction is concerned. They also reveal that the airline may even enjoy better fundamentals than the MEB3 and, given the new economic vision of the Kingdom, the possibility of overshadowing one of the MEB3 is not excluded in the medium term. Porter's five forces of competition strategic framework of analysis was also used when analysing Saudia, particularly in relation to the PEG category of economics. It is recommended that a PEG analysis of Saudia is supported by further analysis through other strategic frameworks to better uncover key factors and forces shaping the airline's strategic future.

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1. Introduction

The scope of this short paper is twofold. One is to strategically analyse a major Gulf carrier which tends to be left out of most studies focusing on the dominant Gulf carriers; also collectively referred to as the Middle East big three (MEB3). The other is to apply a novel, airline industry specific, strategic framework to carry out this analysis, developed by Ellis (2020) a year ago and referred to as PEG. The authors firmly believe that Saudia (previously known as Saudi Arabian Airlines) is an ideal 'test-bed' for PEG given the weight this framework gives to the geopolitics of an airline, with Saudia belonging to a Kingdom where geopolitics have a major influence and tend to outweigh economic considerations.

Whereas the vast majority of studies focus on the MEB3, either zooming in on one specific carrier (typically Emirates), or focusing on the three of them collectively, academic work on Saudia is rare. This can be attributed to (i) perceptions created by available published literature; that is, air connectivity in the Gulf is overwhelmingly provided by the MEB3; (ii) the volume of information disseminated by the media and also rolled out by the MEB3 individually versus that - which is much less - by Saudia and other airlines based in the Gulf; (iii) the significant marketing efforts the MEB3 have led individually since their inception in establishing themselves as global network carriers; and lastly (iv) the direct and symbiotic link between the MEB3, as well as Saudia, to their home country. The MEB3 especially are indirectly market-buoyed by a constant, fine-tuned public relations campaign projected by their respective home State, compared to the less positive perceptions Saudia can rely on about its home State.

The dearth of data and scholarly work available about Saudia also needs to be viewed in the context of the relatively sparse literature available on the MEB3 themselves. Indeed, these three carriers are arguably under-researched, with most of the research to date focused on Emirates (Aquilina Spagnol et al, 2020). Furthermore, over the past decade or so new emerging competition to the MEB3 have attracted most of the limelight, including Turkish Airlines for instance. Similarly, Ethiopian Airlines – an emerging large network carrier and a somewhat remote, yet growing competitor to the MEB3 - has also managed to draw more research attention than Saudia, despite remaining under-researched still. This latter comparison with Ethiopian can only underscore more acutely how under-researched Saudia has been to date.

2. Background

This paper is premised on an ongoing doctoral research study investigating the strategic trajectories of the MEB3. This doctoral research is examining a set of internal and external forces shaping the MEB3 in terms of past, present and future strategic trajectories, with one of the main forces being emerging key competitor airlines such as Saudia. In that study, the MEB3 are de-linked from each other to enable individual airline evaluation against a set of forces (such as key competitor airlines), as well as evaluation against one another. Whereas the primary data about Saudia is yet to be collected - allowing for a thorough multi-faceted analysis of the airline including the use of onion-style frameworks - for the purposes of this paper it is deemed that PEG is the most suitable to study two of the most important forces shaping the strategic trajectory of Saudia, within the broader context of the doctoral research question the author is pursuing. PEG helps to generate clear core insights in an uncomplicated manner, which will be of support to the other methods of analysis in the main research study.

3. Analysis method – PEG strategic framework

The acronym PEG stands for politics, economics and geography (Ellis, 2020). Typical strategic frameworks of analysis employed in air transport management are SWOT, PEST and Porter's five forces of competition framework (Shaw, 2016), while PEG is a strategic framework developed specifically with the airline industry in mind. While it is acknowledged that SWOT is the most widely used strategic framework in industry analysis generally (Grant, 2013; Grundy 2006), PEST is traditionally the favoured strategic framework in air transport studies (Shaw, 2016). Meanwhile, although Porter's five forces model proves to be very insightful as far as airline industry profitability is concerned (Porter, 2008), the PEG framework includes and elevates one key category intrinsic to the airline industry; that is, geography. O'Connell (2011) remarks that geography plays a pivotal role in global aviation, and this is particularly the case when analysing the global reach of an airline's route network (Lykotrafiti, 2020).

4. Application of PEG to Saudia

The underlying reason for developing the PEG strategic framework is that politics and geography are fundamental categories of analysis when conducting a holistic strategic analysis of the airline industry, and they should not be sidelined or downplayed in favour of economic assessments (Ellis, 2020). In devising how PEG should be applied, Ellis (2020) is not prescriptive but only indicative. In this context, the paper here begins with the politics category given the central part it plays in PEG, then followed by geography, and finally economics at the end.

4.1. Politics

Politics refers to both the national and international levels of the airline industry (Ellis, 2020). At the national sovereign level one finds the domestic air market of an airline, traditionally being its network pivot, anchored as it is to its home base. Through a set of bilateral air service agreements (ASAs), its national air market connects to other air markets in other sovereign countries, whereby together they form the airline's entire market or network. These connections between air markets through bilateral ASAs signed between countries represent the international level of the politics of the airline industry (this also includes jurisdictions like Hong Kong).

4.1.1. National level

On a national level Saudia is a very strong airline with 68% of domestic seat capacity and 36% of international seat capacity in Saudi Arabia (CAPA, 2018a). It has the largest capacity in the market fuelled by strong demand. The airline bears the name and flies the classical national emblem of its home Kingdom, clearly showing that the airline is firmly anchored in the country it represents. It ranks as the nineth most valuable Saudi brand in the Kingdom (Brand Finance, 2019). The Saudi Arabian air transport market was opened to private competitors in 2006. Consequently, new names have emerged over the past decade, predominantly operating in the domestic or short haul sectors, and broadly pursuing a low-cost business model, such as Saudia's own subsidiaries flyadeal and Flynas. Yet, Saudia remains by far the strongest player in the marketplace. This can be attributed to an unrivalled domestic network of 27 destinations and 44 international destinations (CAPA, 2021), improving product, and national brand loyalty.

The airline is fully owned by the Saudi State, and despite reports in the past of possible privatization (Reuters, 2017), no such concrete plans are in motion at present, at least for the core airline operations. It is observed that such reports were at times unclear in differing between corporatisation and commercialisation. Saudia operates out of all international airports in the Kingdom, with the largest being the two big transfer hubs of Jeddah (JED) and Riyadh (RUH). In 2018, JED alone processed 35.8 million passengers - exceeding the 34.5 million passengers at the much more famed Hamad International Airport (DOH) in Doha, Qatar - processed for the same year (Reuters, 2019). Meanwhile, RUH processed 27.8 million passengers, Dammam (DMM) 10.4 million, and Madinah (MED) 8.8 million (GACA, 2019). Foreign competition is carefully controlled. In 2014 Qatar Airways – lacking a domestic air market – realised it was the most reliant of the MEB3 on more price sensitive connecting traffic, attempted to launch a subsidiary in Saudi Arabia; Al Maha Airways. This was meant to be a domestic-only carrier flying within the Kingdom. The airline launch was repeatedly postponed through to 2017 when Qatar Airways finally decided to abort the project, citing bureaucracy on the part of the Saudi authorities (CH Aviation, 2017).

Saudi Arabia is currently emerging from decades of insularity and transitioning into a new political era of international engagement, supported by the implementation of an ambitious economic vision to support and expand the economy to usher in a post oil era. International tourism is one catalyst behind this new economy (Vision 2030, 2021). Within this context, Saudia is a political and economic State-owned tool to fulfil this ambition. Aquilina Spagnol et al (2020) point out that in the case of the Gulf carriers what is remarkable about their State ownership is that this is translated into the airline, or the airline group, being strategically positioned in the local economy; thus, allowing them to be aligned with and benefit from the national economic vision. Like with the MEB3, particularly Emirates and Qatar Airways, this 100% State ownership and Saudia's central role in its government's economic plans, translate into financial backing and unwavering national support, including in government policies, which in turn are conducive to making Saudia a global challenger of the MEB3.

While it has been recently reported that a second national airline could be set up based in Riyadh (Al-Monitor, 2021), precise plans remain vague. One can assume that due to the transformation programme Saudia is presently

undergoing to position itself as a major Gulf Cooperation Council (GCC) airline, and given this programme is closely interlinked with the Kingdom's Vision 2030, any second national airline would be complementary to Saudia and not a direct competitive threat.

4.1.2. International level

On an international level, although Saudia lies in the shadows of the neighbouring MEB3 in terms of destinations served, and their considerable marketing and public relations efforts, along with their international recruitment campaigns and global accolades, Saudia still operates a sizeable network spanning four continents and serves some of the longest routes in the industry (Arab News, 2015). Like its neighbours, and with the exception of the all wide-body fleet of Emirates, Saudia operates a modern mixed fleet of short, medium and long-haul aircraft (Saudia, 2021), with a much lower number of dedicated freighters which situates it in this regard as being broadly similar to Etihad.

It is noteworthy that Saudia is part of SkyTeam and therefore enjoys an enhanced level of marketing cooperation with 18 other airlines. Through such an airline alliance, it can offer streamlined access to more than 1,036 destinations worldwide (SkyTeam, 2021). SkyTeam membership enables Saudia to provide a somewhat distinct offering compared with the neighbouring MEB3 and other regional competitors, in terms of alternate transfer hubs and overall product offering. Qatar Airways is a oneworld alliance member, whilst key competitors Turkish Airlines and Ethiopian Airlines are members of Star Alliance. Emirates and Etihad remained unaligned, although both have a wide range of code-share and bilateral strategic partnership agreements.

For Saudia to achieve the global reach of its MEB3 peers, its home State needs to increase its efforts in signing not only traditional ASAs, but more importantly, liberalising current agreements, including fifth freedom traffic rights, as well as granting rights in an unlimited and unrestricted manner. Being the exclusive flag carrier of the Kingdom, more liberal bilateral ASAs and multilateral agreements will unlock new destinations for the airline, giving it the flexibility to not only increase traditional origin and destination (O&D) traffic, but also of exploiting more unusual freedoms of the air to bring financial sustainability to otherwise unviable routes. Emirates has done so in successfully connecting West to East through its transfer hub in Dubai; not only to maximise profitability of trunk routes but also to connect smaller cities to its home hub which otherwise would not be financially possible. Dubai to Malta via Larnaca is a good example. In their analysis of Tunisair, Schlumberger and Weisskopf (2012) observe that one of the reasons why the airline did not fare well in capturing sixth freedom traffic as much as Royal Air Maroc did between Europe and West Africa, is partially because of more restrictive bilateral agreements.

Unlike its neighbouring Gulf States of the UAE, Qatar and lately Oman, Saudi Arabia has not embarked on any talks with the EU to sign an open skies agreement with the bloc. Whilst the UAE walked away from such an agreement at the eleventh hour in 2019, Qatar has finalized such a deal, enabling Qatar Airways to address its traffic right deficit vis a' vis Emirates. Furthermore, while Saudi Arabia does have an open skies treaty with the US (Flight Global, 2011), this is not reflective of any particularly liberal stance that the Kingdom adopts in traffic rights negotiations. In 2004 Saudi Arabia did not sign the Damascus Convention; known as the 'Arab League Open Skies Agreement' which sought to encourage "the gradual liberalization of air transport within a regional and multilateral framework" (Schlumberger, 2010). Saudi Arabia's abstention from signing it is in contrast to neighbouring Gulf States such as Qatar, Oman and Bahrain.

Likewise, to date Saudi Arabia has not yet signed the International Air Services Transit Agreement (IASTA), 1944 (ICAO, 2021), an agreement complementing the 1944 Chicago Convention which grants automatically to its State signatories the first freedom (overflight) and second freedom (refueling and technical stops) of the air (McGill, 2021). Saudi Arabia's abstention from this agreement proved to be a major point of contention during the Qatar blockade which began in 2017 and ended in 2021. One of the central consequences of this blockade was the prohibition of all Qatar Airways and Qatari registered aircraft from flying into Saudi airspace. When dispute resolution proceedings were launched by Qatar at the ICAO Council, to its defence Saudia Arabia maintained that given it was never a signatory of IASTA, it had the right to block Qatari aircraft from its airspace (Jus mundi, 2020).

It must be mentioned though that in July 2021 Saudi Arabia announced that IATA would open its regional headquarters in the Kingdom, demonstrating in the process a more international approach to air transport (Saudi Gazette, 2021).

4.2. Geography

Geography reveals where and why an airline operates (Ellis, 2018). This explains for example why the MEB3 are large network carriers out of necessity, whereas comparatively speaking Saudia lags behind in international travel but relies on its domestic travel component as a large percentage of its total traffic carried (40%+ pre-Covid pandemic) (CAPA, 2018b). Airlines in the UAE and Qatar have no choice but to compete for international traffic to achieve and maintain their large network carrier status, due to their limited or non-existent domestic market. Saudia, whilst benefitting from the same geographical location of the MEB3, can afford to exploit this advantage less aggressively given the compensatory traffic assurances of its huge domestic air market.

From another perspective, geography also partly explains why the MEB3 have been so successful in establishing themselves as global carriers, particularly in connecting traffic via their hour-glass hubs. With the ability to reach one third of the world's population within a 4-hour flight duration, and two thirds of the global population in an 8-hour flight radius (Dubai International Airport, 2010), the MEB3 have turned geography into one of their critical success factors. In this respect, Emirates - the trailblazer of the Gulf trio - exploited what Singapore Airlines had done 15 years before it, and took the Singaporean business model a step further due to a better geographical location leading to better worldwide coverage. Turkish Airlines, two decades later, imitated what Emirates had done before and exploited the geographical location of its main hub to provide an even more comprehensive network than any of the MEB3, although with some challenges reaching as far East as the MEB3.

The examples mentioned above are only a few of the many demonstrations corroborating geography as a category of analysis deserving on many occasions more importance and focus than economics. Alkaabi (2014) pointed out that geography is a very important consideration in better understanding the ongoing development and impact of the major Gulf carriers. Nancarrow (2013) highlights how the Gulf carriers have been referred to by many industry analysts as being located at "the geographic centre of the world". According to O'Connell (2011), by exploiting geography, Emirates has balanced its domestic market deficit. Thus, geography and the Gulf carriers, including Saudia, are interlinked and interdependent. Strategic analysis of Saudia through a geographical perspective is fundamental to achieving a reliable and holistic analysis of the airline's strategic context and future prospects.

Applicable to Saudia are the "four geographical levels" termed by Holloway (2008). These being:

4.2.1. Region to Region

Saudia is well positioned to connect West to East (Europe to Asia), East to West (Asia to Africa & Europe), and North to South (Europe to East Africa), particularly through its largest transfer hub of Jeddah. Located 2 hours and 30 minutes flight time West of Dubai, it can readily attract transfer traffic from the MEB3 home hubs as well as Istanbul; the latter being 3 hours and 20 minutes flight time away (Air Miles Calculator, 2021). With two large international airports capable of handling international traffic, Saudia is well positioned to competitively challenge the weakest MEB3 in the short-medium future; arguably that being Etihad which has faced a number of setbacks of late as partners have gone bankrupt (e.g. Jet Airways) and senior leadership (and with it strategic plans and goals) have changed.

4.2.2. Country to Country

Complimenting the preceding analysis, Saudia is a direct challenger to Turkish Airlines particularly for connecting traffic between countries in Europe, Africa and Asia via its two large transfer hubs. This is because of the latter's closer proximity to Turkish's home transfer hub of Istanbul Ataturk which lies at the intersection between Europe, Africa and Asia. This gives Saudia an advantage over the MEB3 in developing a more attractive O&D network from the Kingdom with shorter flight segments, although admittedly Turkish enjoys more O&D traffic to Europe with higher frequencies (in large part explaining its considerable narrow body fleet size – see Table 1). Saudia also enjoys a slight advantage over Ethiopian for most of Europe to Asia travel due to shorter flying times, but it is at a slight disadvantage for Europe to Africa travel. Table 1 provides an interesting snapshot into Saudia and five key neighbouring competitors. The impact of Saudia's domestic air market (and the aforementioned regional services) is clear with its narrow body fleet and domestic passenger (PAX) destination numbers second only to Turkish Airlines. In contrast, Saudia is ranked last for total non-stop international destinations, while top ranked Qatar Airways continues to robustly expand its fleet and global network post-blockade and as the COVID-19 pandemic begins easing

in many parts of the world. The potential for Saudia to expand its international route network, and to concurrently increase its wide body fleet, are plain to see.

Table 1. Saudia and its five key neighbouring competitors in early October 2021. (Source: Compiled by authors using data from CAPA, 2021)

Airline name (IATA code)	Narrow body PAX fleet (+ inactive)	Narrow body fleet: On order	Wide body PAX fleet (+ inactive)	Wide body fleet: On order	Non-stop domestic PAX destinations	Non-stop international PAX destinations
Saudia (SV)	106 (1)	35	82 (8)	3	27	44
Emirates (EK)	0	0	182 (83)	208	1	119
Qatar (QR)	30 (2)	105	170 (19)	106	1	139
Etihad (EY)	15 (15)	26	53 (19)	72	1	61
Turkish (TK)	224 (12)	57	112 (10)	31	48	204
Ethiopian (ET)	41 (11)	27	65 (0)	8	16	92

4.2.3. City to City

Saudia has a strong domestic network and together with its flyadeal subsidiary, provides an unrivalled domestic network. It serves its international network from five international airports in the Kingdom. This flight web of domestic destinations feed Saudia's international flights with traffic which does not need to be sought from outside the Kingdom. In contrast, almost any feeder traffic to the MEB3 transfer hubs has to come from international flights.

4.2.4. Airport to Airport

Jeddah and Riyadh are well connected by Saudia, while flyadeal connects a number of secondary airports to them as well.

4.3. Economics

Applying PEG to analyse an airline includes an economic assessment of the entity, and this can be effectively achieved through gauging a range of key economic indicators, and also via a key competitor analysis. This reflects the philosophy behind PEG which is to give central importance to politics and geography in terms of the airline business, while ensuring economic factors do not take centre-stage but only surround and support the other two core analysis categories. This way, economics remains important but not paramount. After all, overall profitability has rarely managed to be positive throughout the industry's century long history.

Like with the MEB3, information and data availability for Saudia are limited. Saudia fares particularly poorly when it comes to publishing financial information and results. This can be attributed in large measure to its home State culture where confidentiality and continuity are highly prized, as opposed to the importance placed on public transparency and accountability in more democratic countries (Aquilina Spagnol et al, 2020).

As the PEG framework analysis has shown in the previous categories, Saudia is an integral part of its home Kingdom; not only because it is fully State-owned and a top-10 local brand, but also because with recent moves toward greater economic openness and liberalisation, it is seen as essential more than ever to project the Kingdom's image across the globe and to fulfil the economic goals of Vision 2030. Saudi Arabia is also home to Mecca; the holiest Muslim city, and therefore hosts the annual Hajj pilgrimage which every physically able Muslim around the world is to perform at least once in their lifetime. Crucial to this is Saudia which commands a 40% share of this religious traffic (CAPA, 2018b). On charter flights alone, Saudia carried three million passengers for Hajj and Umrah in 2017, totalling around seven million when scheduled traffic is included (CAPA, 2018c). In fact, this market segment and Saudia are so intertwined that it is one of the stated four pillars of the airline's transformation programme launched in 2016 (CAPA, 2018b).

It is not entirely clear as to what extent Saudia's financial accounts are segregated from those of the State. The airline does not publish any audited financial accounts, and the only gauge of its economic metrics can be done through

its limited and selective announcements to the media, and through data which market intelligence providers manage to obtain and make available to the research community. Some airline data and related information can also be extracted from the annual reports published exclusively in the Arabic language by GACA; the Saudi civil aviation authority.

As far as the economic analysis of Saudia is concerned, supplementing PEG, an analysis through Porter's five forces is carried out. Porter's five forces model considers industry rivalry (i.e. existing competitors) through the lenses of threat of new entrants, threat of substitutes, power of supplies and power of buyers (Shaw, 2016). The outcome of this analysis is that Saudia enjoys a low level of threat from all competitive forces acting against it; it comfortably enjoys a blue ocean market space; and thus, assuming control on all costs, profitability and viability are ensured, or are at least of no material concern to the ongoing long-term viability of the airline.

4.3.1. Threat of New Entrants

Although the Saudi air transport market has been open to competition since 2006, the civil aviation authorities have been very cautious in allowing new entrants in the market. Apart from Saudia's own subsidiary flyadeal, only three other airlines have been allowed to operate; flynas, Saudi Gulf and Nesma Airlines. Only flynas has a sizeable domestic market share accounting for about one third of Saudia's. Meanwhile, flyadeal was set up in 2016 by Saudia itself as a low-cost subsidiary. Since then, Saudia has increased its dominance in the domestic market. Furthermore, whilst all carriers are allowed to operate international traffic, most of the bilateral ASAs signed by Saudi Arabia designate Saudia as the exclusive operator. If plans for a second national airline materialise, one would assume that its development will be synchronised with that of Saudia. Overall, this threat is low.

4.3.2. Threat of Substitutes

Domestically, the Kingdom has a limited rail network, and the road network although developed to international standards experiences a high accident rate. As for air travel, flynas is the other airline which offers considerable competition but to date it trails far behind. International travel by rail within the GCC is not yet possible. By road it is limited, and when available it is lengthy and carries a high safety risk. In terms of international air travel, Emirates is the only other airline that matches Saudia in terms of capacity from the Kingdom. Overall, this threat is low.

4.3.3. Power of Suppliers

With the Saudia Group fully owned by an oil rich Kingdom with a lot of economic and political clout worldwide, the power of suppliers is limited. Aircraft orders tend to be negotiated favourably by Saudia as wider trade and investment realities in the Kingdom encourage aircraft manufacturers to often offer competitive prices. Saudia is also vertically integrated as a group, allowing it to benefit from economies of scale across its value chain. The threat here is also low.

4.3.4. Power of Buyers

Domestically, airline passengers do have not a great deal of choice in the Kingdom. Saudia has a very comfortable market share, while also providing a good low cost offering to rival flynas. Internationally, the main global network carrier rival for Saudia is Emirates. Buyers' power is limited and hence the threat to Saudia is low here as well.

5. Conclusion

Saudia remains a fascinating and insightful airline case study yet to be extensively investigated in the scholarly or wider industry and media literature. Given the future prospects for Saudia are only likely to improve as its host nation continues an ambitious economic diversification and development agenda, it remains an airline worthy of closer analysis. The simple and straightforward PEG strategic framework is ideal when analysing airlines like Saudia where politics and geography carry more weight in their strategy formulation, compared with other carriers such as private low-cost carriers (LCCs) in a red ocean market space. Whilst politics and geography are omnipresent in the airline industry, they are accentuated in the case of all the major Gulf carriers where most have been set up to be a national industry champion and flag bearer of an oil rich State; that is, a strategic tool for national development. Politics and geography, especially their merged counterpart geopolitics, are accentuated because more than economics geopolitics

has a huge influence in the strategic management of these airlines. Saudia proves to be a salient case study for use with PEG because the framework focuses the analysis mainly on these two crucial categories; both of which are fundamental for Saudia. Furthermore, with Saudia difficult to be thoroughly analysed in terms of economic indicators alone (or when predominate), PEG becomes a suitable and valuable tool to generate a more meaningful strategic picture.

5.1. Limitation of the paper and further research

Given that primary data about Saudia are yet to be collected for this doctoral research study, the paper here made use of only secondary data when deploying the PEG framework. Furthermore, whilst it has been found that PEG is a very suitable strategic framework for airlines where the strategies of which are heavily influenced by geopolitics, it would be wise to corroborate the analysis' outcome, as laid out in this paper, through the use of at least one other strategic framework in future. For instance, the politics, economics, social and technological (PEST) framework is a widely employed strategic framework in air transport research and would be a prime candidate in this regard.

As has been noted, the PEG's "simplicity is not only an asset but also a potential flaw" (Ellis, 2020, p. 222). There are other considerations for which the PEG acronym may be too restrictive, such as environmental concerns surrounding the industry's carbon emissions and contribution to climate change (Ellis, 2020). Deploying more than one framework will validate better the outcomes herein about Saudia, and give them a firmer grounding.

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