International Journal of Advanced Research in Management and Social Sciences

ISSN: 2278-6236
Impact Factor: 7.065

FORESIGHTFUL STRATEGIC PLANNING AND ORGANISATIONAL FLEXIBILITY IN THE SAUDI TELECOMMUNICATIONS SECTOR UNDER TURBULENT ECONOMIC CONDITIONS

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ABSTRACT

Purpose: This study sought to uncover whether there is any evidence of strategic reorientation among Saudi telecommunications companies in line with the major economic changes taking place in Saudi Arabia, and whether these Saudi companies are developing organisational flexibility or not.

Methodology: A multiple-case study was conducted involving document analysis and interviews at three of the major companies in the Saudi telecommunications sector: Mobily, STC (Saudi Telecom Company), and Zain (Kuwaiti company), using recent publicly available information, mainly from their latest annual reports, combined with interview data to examine the nature and extent of organisational flexibility in these firms and their strategic planning in light of forecasts of the economic environment.

Findings: The findings uncovered details related to foresightful strategic planning and evidence of developing organisational flexibility for the three major Saudi telecommunications providers – Mobily, STC and Zain.

Significance: The study confirms previous research that also indicated evidence of both foresightful strategic planning and organisational flexibility in the Saudi telecommunication sector.

KEYWORDS: Saudi telecommunications sector, strategic planning, strategic foresight, organisational flexibility, economic changes

INTRODUCTION

Organisational structure should be arranged in accordance with the environment (Volberda, 2004), and flexibility within this structure is essential when this economic environment is highly dynamic, turbulent and uncertain. In a study by Alotaibi (2019), it was found that the current economic environment of Saudi Arabia fits this description of being dynamic and uncertain, and it was shown that strategic planning is necessary to remain competitive and to maintain the desired strategic orientation in such an environment.

The changed economic landscape and direction in Saudi Arabia, due especially to the demands to achieve Vision 2013 and to reduce dependency on oil, also requires for organisations to both have flexibility to adapt to changes and to engage in strategic planning. The reason for this is the turbulent times in which Saudi Arabia finds itself. This situation of "turbulent economic conditions" was acknowledged by the Saudi king following the 2017 budget despite the otherwise strong economy (AP, 2016). Having flexibility enables organisations to adapt to these changes quickly and timely.

Under turbulent economic conditions, strategic planning practices and techniques need to be able to handle the fast-paced and uncertain environment in order to aid decision makers (Battistella & De Toni, 2011). Popular practices and techniques suitable for these conditions are identified in the literature review that could be helpful for identifying key change drivers in the external environment and to investigate their likely impact on the sector including trends and evolution. This is in addition to economic forecasting techniques such indicators, surveys, diffusion indexes and economic model building used to gain information about the external environment.

The above-mentioned tools and techniques however, have been criticised for their reliability in making long term forecasts (Eisenhardt et al., 2010). Political, socio-economic and technological changes can be highly unpredictable and subject to unforeseen outcomes. Given their limitations for forecasting the impact of the external environment, an alternative is to focus instead on developing organisational flexibility (Wilt bank et al., 2006). This may be described as a reactive approach compared to the predictive or fixed plan-based approaches.

This paper attempts to explore the prevalence of the two approaches, namely forecasting and fixed planning and developing organisational flexibility, in the context of the telecommunications sector in Saudi Arabia, which was deemed to be operating under turbulent economic conditions. The aims are to examine how these approaches help organisations in this sector align with the environment, as they may, for example, enhance organisational performance depending on the circumstances under which each approach is suitable.

The theoretical contribution of this paper to the literature on strategic management is in deepening our understanding of how organisations cope strategically in uncertain and turbulent economic environments. Specifically, it sheds lights on how the Saudi telecommunications sector is coping with the current turbulent times, and the suitability or strengths and weaknesses of different strategic approaches in the context of technology companies operating within an uncertain and turbulent economy.

LITERATURE REVIEW

This brief review of previous literature focuses on companies operating in uncertain and rapidly changing economic environments. A financial or economic environment could be considered as changing rapidly under uncertain conditions when there are complex and conflicting trends and sudden impacts and changes of direction. Internally, this situation creates deficiencies in the ability of managers to understand the external environment and how it will likely affect their organisation. And, consequently, they lack confidence in dealing with the changes (Loveridge & Saritas, 2012).

Uncertainty presents challenges for strategic management in which strategic planning is typically conducted formally and systematically with a degree of certainty. Notably, it undermines the very foundation of strategic planning because accurate and adequate knowledge about the operating environment and its likely impact becomes difficult to analyse. Preparing for uncertain and turbulent environments has thus encouraged the development of special strategic planning tools, techniques and practices appropriate for application under conditions of uncertainty.

Techniques suitable for these conditions include environmental scanning, product and technology road mapping, real options analysis, and scenario analysis (Courtney, 2001). Other less used future-oriented tools and techniques are those used specifically for supporting decision making (Porter et al., 2004), capital structuring and budgeting (Graham & Harvey, 2001), and promoting innovation (De Meyer et al., 2002). These are all employed for the purpose of strategic planning through gaining 'strategic foresight'. Strategic foresight may be defined as "the ability to create and maintain a high-quality, coherent and functional forward view, and to use the insights arising in useful organisational ways… [such as] to detect adverse conditions, guide policy, shape strategy, and to explore new markets, products and services… [which] represents a fusion of futures methods with those of strategic management" (Slaughter, 1999: 287).

Although concern with strategic foresight has been gaining ground in an age of increasing uncertainty, the practice does not have a successful track record (Hirsch et al., 2013) and little is known about its implementations and impact. The main criticism has been its lack of predictive capacity, that is, its inability to predict with sufficient reliability. It has mostly been useful for short-term foresight, as its usefulness for long-term forecasting diminishes rapidly (Eisenhardt et al., 2010). Due to this major weakness, some researchers recommend the idea to be abandoned altogether (Hamel, 2000), and have advocated instead for developing organisational flexibility to gain 'strategic agility' (Wilt bank et al., 2006; Doz & Kosonen, 2008). Organisational flexibility is developed to create the capacity to respond quickly to environmental changes as and when they arise (van der Heijden et al., 2002).

Since there is little comparative research conducted previously on forecasting-based strategic planning tools and techniques and organisational flexibility, or strategic foresight and strategic agility, it is worth exploring the same with a real-world example which is the context of the Saudi telecommunications sector operating under turbulent economic conditions.

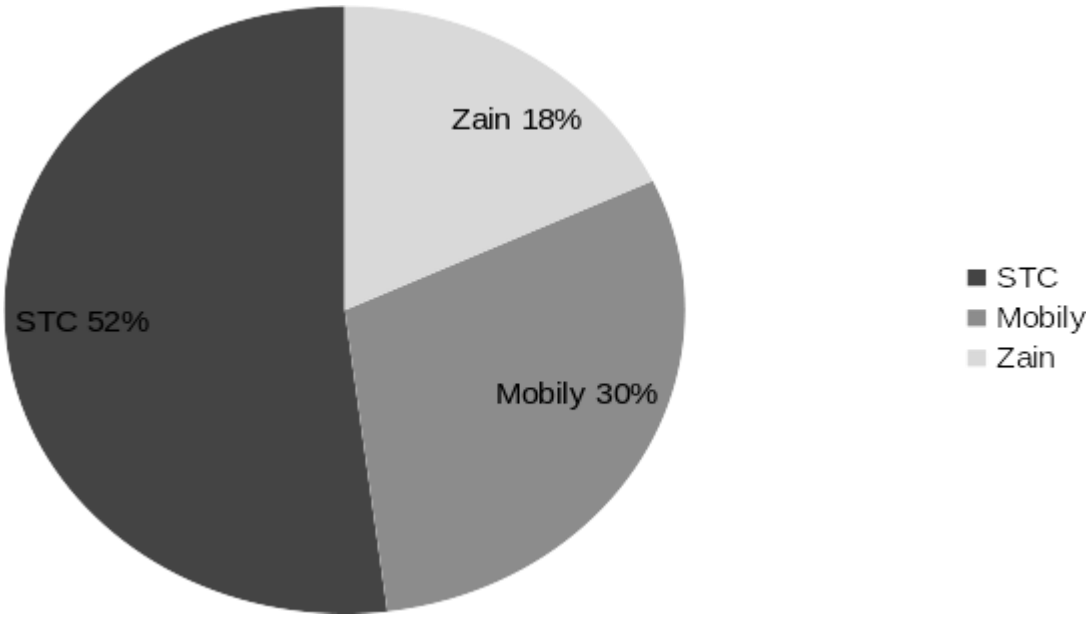
THE SAUDI TELECOMMUNICATION SECTOR

The Saudi telecommunication sector is a major sector in Saudi Arabia. It is also the largest in the Middle East. In 2015, the sector was valued at US$21bn, which represented 57% of the share of the telecom market in the GCC (Gulf Cooperation Council) region (CommsMEA,

2016). Notably, the industry witnessed a growth in that year despite reduced consumer spending. This sector provides three key services: fixed telephone service, mobile phone service by mobile network operators (MNOs) and Internet services by Internet service providers (ISPs).

The industry is dominated by STC (see Figure 1), which has between 52 and 56% of market share. STC operated as a state-owned monopoly until 2004 in all three of the aforementioned service areas. STC was the dominant operator until it ceased to be a monopoly, but since then the other players in the industry have been reducing its market share. In the fixed telephony market, the only competitor is Etihad Atheeb, which has relatively low market share, and in other markets, which are much more competitive, STC competes mostly with Mobily and Zain, which entered the sector in 2007 and 2009 respectively. At the end of 2015, mobile subscriptions in Saudi Arabia stood at 53 million, of which 52.6% belonged to STC, 24.6% to Mobily, 22.45% to Zain, and the remaining 0.35% to Bravo (CommsMEA, 2016). And as of 2016, the ratio of telephone subscribers to inhabitants was 1.7659:1 and 94% of households in the kingdom had Internet access. The number of smart phone based internet users were 19.4 million in 2018 and is expected to continue rising to reach 21.3 million in 2023 (Puri-Mirza, 2019).

Figure 1: Market share of the three major telecommunications players in KSA



Source: Aljazira Capital, 2018

In a study on

the marketing strategies of firms in the Saudi telecommunications sector by Alam & Salim (2012), it was found that the firms are focused on providing service quality given its positive association with customer satisfaction and ultimately with customer loyalty. Kadasah (2014) compared the service quality between different firms and found Mobily was performing the best in all service quality dimensions, and Al Rawashdeh (2015) found Mobily was also ahead in terms of profitability. However, in comparison with other sectors, a study by Ali (2017) showed that overall customer satisfaction in the Saudi telecommunication sector is very low, and customer perceptions of the service quality is also lower than their expectations in all dimensions of SERVQUAL. As for customer satisfaction in Saudi Arabia among customers in the telecommunications industry, according to Sharma (2014), this depends largely on the aspects of customer care service, service quality, network coverage, and value added and promotional schemes. Strategic planning is therefore mainly focused on ensuring the delivery of quality services.

With respect to strategic planning in the Saudi telecommunications sector, during the first few years of their operations, the strategies of the mobile companies was to gain connectivity revenue from subscribing new customers, whereas the focus now is more on gaining additional revenues from existing customers by ensuring they remain competitive. This is common to all the telecom players in the kingdom, although STC is also pursuing an overseas expansion strategy (Aljazira Capital, 2012). Mobile telecommunication companies in particular focus on value added services (VAS) and have been upgrading their infrastructure as a growth strategy.

Mobily has forged a strategic partnership with Google for its enterprise computing services. This indicates a strategy to move beyond providing basic services and to gain competitive advantage by providing a comprehensive package of services to its customers. Mobily also has ties with other companies such as Huawei and Samsung. Zain is also partnered with Huawei, as well as Ericsson and Motorola. However, its approach differs from Mobily, as Zain focused initially on major cities before expanding to others, whereas Mobily introduced services such as 4G in smaller cities before providing the same to larger cities. In the current uncertain economic climate however, it is likely that the successful telecom operator will be the one with a healthy balance sheet and a targeted growth strategy. Mobily has thus been pursuing a cost reduction strategy to improve its competitiveness.

The current focus in strategic planning is on strengthening partnerships, bringing about improvements to efficiency in offering digital services, and investment in 5G technology (Business Wire, 2018). Key emerging trends in the digital field are the Internet of Things (IoT) and cloud mobility in which the Saudi companies are keenly interested as well. This shows measures being taken to provide customers with greater integration of related services. This is also evident, for example, from STC's 'InVision' strategy which combines telephony, video-on-demand and internet services. In addition, it is pertinent to note that the Saudi telecommunication operators are also taking steps to become more agile in response to the changing requirements of customers and due to changing market conditions.

Migdadi (2017) examined the operational strategies of 27 out of 31 providers of mobile phone services in the Middle East region based on data collected from websites, annual reports and other published sources. These were then classified into four taxonomies: agile,

lean, product and cost, and K-means clustering analysis was used to analyse the clusters. A taxonomy is defined as "an empirical classification of mutually exclusive and exhaustive groups by using methods of numerical taxonomy and an assortment of clustering algorithms and hypotheses testing technique to identify the mutual clusters in the data" (Miller, 1996).

The study by Migdadi (2017) is an important contribution because there have been limited previous studies on the operational strategies of organisations in the telecommunication sector (Dahlstrom et al., 2004; Curwen & Whalley, 2007; Karabag & Berggren, 2011), especially in the Middle East region (Migdadi, 2012). Secondly, it is valuable for its comparative insight across countries, in identifying effective taxonomies, and in investigating the impact of the context on adopted taxonomies. Other studies have investigated industry type as the contextual factor (Sum et al., 2004; Zhao et al., 2006), but not many have investigated the country as the context (Frohlcih & Dixon, 2001; Midgadi, 2017).

The latter study mentioned above by Migdadi (2017) not only investigated the country context on adopted taxonomies, but also in the same regional context of the Middle East as in this current study, and it included the majority of mobile phone service providers in this region including three from Saudi Arabia (STC, Zain, Mobily). According to his analysis, the telecommunication sector has reached a saturation point although it is still growing. It is a huge sector; ranked third after Europe and USA in 2010.

Corporations classified as agile adopted all competitive operations to a high degree, which includes the main call service, diversity of services, and accessibility of the services. Notably, this taxonomy was the most widely adopted throughout the Middle East region, but especially Saudi Arabia and Iraq. This was followed by lean, then product and cost orientation, and the product-oriented taxonomy was considered most effective overall after an initial cost-oriented strategy considered as the least effective taxonomy overall. The effectiveness of the agile taxonomy was also corroborated by Menor et al. (2001). Furthermore, among the three Saudi companies, Zain was classified overall as most agile, STC as more focused on lean strategies, and Mobily as more product-oriented.

METHODOLOGY

In this current study, an attempt is made to further examine the nature and extent of organisational flexibility in Saudi telecommunication firms and their strategic planning in light of forecasts of the economic environment. A multiple-case study was conducted for this purpose involving document analysis and interviews at three major companies in the Saudi telecommunications sector: Mobily, STC (Saudi Telecom Company), and Zain (Kuwaiti company). All these companies make extensive use of strategic planning tools and techniques including forecasting tools. Two other companies, also targeted initially, namely ITC (Integrated Telecom Company) and Go Atheeb, were later excluded due to insufficient data and their insignificant share of the market.

The case study method was chosen due to its potential in constructing a theory (Yin, 2003), and given the gap in the literature, the open-ended nature of the enquiry, and the need for an inductive approach. Multiple cases were examined to strengthen the reliability of the findings and to draw comparisons for confirmation or disconfirmation, as the case may be. Examining multiple cases permits a replication logic whereby clarifications can be made as to whether the findings and any inferences made in one case are corroborated or not by the same from the other cases. Moreover, it has the potential to help devise a robust theory since propositions are usually grounded deeply based on empirical evidence, and theoretical propositions and research questions are explored broadly (Eisenhardt, 1989).

The Saudi environment was analysed over the period 2016 to the present. This was chosen as the starting year because it was the year in which the Saudi Arabia's Vision 2030 was announced by Crown Prince Mohammad bin Salman on 25 April 2016 followed by the National Transformation Program on 7 June 2016. The analysis sought to identify the main sources of uncertainty, drivers of change, goals, policies applied to the economy at large, and specifically how the examined organisations are aligned with this environment through forecasting and strategic planning compared to a strategy of maintaining organisational flexibility.

Data were collected from publicly available documents including annual reports, reports by financial analysts, websites, articles of industry experts, previous studies in academia, and conference proceedings. These sources were supplemented by interviews with three representatives from each of the three companies involved in strategic planning, leading to

nine interviews in total, and data from memos and other internally available papers from their company archives.

RESULTS AND FINDINGS

The Saudi economic environment is affected by five sources of major changes and uncertainty:

1. The reorientation of the kingdom's economy to become more diversified, knowledge-based, and with an expanded private sector in order to reduce its dependence on oil through a major overhaul; (Patalong, 2016; Nurunnabi, 2017)
2. Impact of the uncertain global economic outlook that could reduce demand for its oil; (Gallarotti & Filali, 2013; Alotaibi, 2019)
3. Impact of the anti-corruption drive on investors; (Gulf News, 2018; Lassoued et al., 2018)
4. Geopolitical risks in the region due to the ongoing conflict with Yemen and tensions with Iran; (Fanack, 2017; Henderson, 2017)
5. Related social changes such as growing youth population, some liberalisation policies, allowing tourists to visit the kingdom, and expanding roles for women in society. (Gallarotti & Filali, 2013; Beig, 2019)

The main goal of the overhaul is to transform the economy to achieve Vision 2030. Although some progress has been made towards achieving this, the kingdom has also faced setbacks, especially due to the crash in global oil prices during 2014 to 2015 and the consequent deficit of $100 billion in 2015 and $71 billion in 2016 (Alkhalisi, 2017). In terms of employment, although the Saudi government has been successful with the Saudisation programme under which jobs are restricted for foreign workers, it is struggling with creating jobs for native Saudi citizens (Focus Economics, 2019). The aforementioned sources of uncertainty have impacted strategic planning in the telecommunications sector. The foresightful component of this planning and information on developing flexibility were examined for each of the three companies from publicly available data.

Table 1: The three companies examined in this study

Company	Year established	Revenue in SAR millions (2018)	Estimated market share in millions (2017)
Mobily	2007	11,865	12.6
STC	2004 (privatised)	51,963	21.84
Zain	2009	36,264	7.56

Mobily

Mobily claims to be customer-centric and oriented, and has specified three fundamental goals, which are establishing Saudi identity by providing an admirable brand, giving "a better choice" by delivering superior products and services, and "a better life" by providing services that "are functionally and emotionally important to consumers".

In 2017,Mobily announced a new corporate strategy called RISE based on four tracks:

- Regaining commercial strength
- Igniting customer experience and digital excellence
- Striving to gain agility and efficiency
- Enabling world-class execution

Following this strategy, the company then adopted a new positioning strategy to strengthen its brand, develop "a culture of efficiency" to develop "a more effective operating model". It also specifically mentions that it is enhancing its agility to cope with the transformations taking place in the IT industry and to increase its capacity for further growth. The company considers its "exceptionally" strong network and data centre as putting it in a "pole position for future growth" (Mobily, 2018: 11).

Mobily recognises the volatility of the markets and attributes this to oil production cuts by OPEC, rise in consumer spending, and the reform strategies being implemented for achieving

Vision 2030 and the National Transformation Plan. Nonetheless, it projects growth in the telecommunications sector due to new emerging technologies. Moreover, Mobily also recognises the need to be more agile so that it can provide "the latest and most competitive solutions" (Mobily, 2018: 10).

There is evidence of strategic planning through forecasting by Mobily's adoption of business intelligence practices and conduction of market analysis, and also evidence of innovation by its introduction of new products and services, and its attempts to future proof its network by offering "a superior digital offering". Its future strategy is set on striving to become more admired and to provide superior value for all its stakeholders by focusing on performance.

STC (Saudi Telecom Company)

STC has a a well-defined and comprehensive strategy. In 2018, it introduced a DARE (digitisation, acceleration, reinvention, expansion) strategy to not only improve its own financial performance in spite of market decline, but also to support its development of internal and commercial capabilities. In respect of the first digitisation pillar, the company has invested in the digitisation of the Saudi economy and strengthened its asset base comprising clients, employees, technology and brands. As part of this digitisation strategy, it deployed a new flexible technical infrastructure in 2018, digitised some key procedures and employee services, and made more use of databases for analysis.

And accelerating the performance of core assets is part of its second strategic pillar, which has involved deploying new fibre optic networks, expansion of its service portfolio, and reduction in its operational costs. In addition, STC has made changes to its organisational structure recently in order to optimise them for delivering digital services, and has been engaged in programmes to improve organisational culture. STC's third pillar is to 'reinvent customer experience at world class standards' despite already being a market leader. The fourth pillar to 'expand aggressively scale and scope' is an ambitious growth strategy to expand the company's infrastructure and connectivity, and for developing IoT (Internet of Things) as a new platform, as well as other digital services such as data analytics and cybersecurity.

STC also enjoys a strategic agreement with King Khalid Foundation to consolidate its social responsibility programmes, with the Prince Mohammed bin Salman bin Abdul-Aziz Foundation, with the Beban Forum for arranging meetings and workshops with business owners and entrepreneurs, and with the MESC Global Forum to connect with business leaders and to support Saudi youth.

In short, STC made significant progress in implementing the above strategy, and notably, it is evident that STC has been preparing for the future by strengthening its customer base and brand, improving its infrastructure, and through its commitment to maintaining its leading position in the market, maintaining financial stability and to ensuring its human resources are skilled. The DARE strategy seems to be successful, and STC is using this strategy to consolidate its continued future progress.

Arrangements for looking ahead and increasing organisational flexibility is also evident at STC. The company recognises the rapid economic changes taking place in the kingdom, as well as developments in the telecommunications sector and wider technological changes. In preparation for this uncertain environment, STC has comprehensively examined the strategic and operational risks involved, and has been developing frameworks, policies and procedures accordingly. The main risks are identified as coping with the aforementioned developments, cyber-attacks, cloud computing security, regulatory developments, data governance, potential disturbances in supply procedures and disaster retention. STC has laid out plans for dealing with each of these potential risks.

Zain

Zain is well-aware of the key trends in the wider MENA (Middle East and Northern Africa) region, such as fixed broadband, 5G, IoT and digital ecosystem. Consequently, the company is moving rapidly toward increasing digitisation, and has embarked on an expansion strategy for its broadband network to provide its customers with the latest connectivity.

Zain has also undertaken a number of initiatives aimed at transforming itself to become more flexible through its strategy of optimisation and simplification of processes and services. In addition, it is redefining itself by modernising the customer experience through introducing new digital channels, such as its chat-based customer care solution, optimising

its network investments, and is devising an ecosystem to support decision-making based on AI (Artificial Intelligence) and analytics.

Another dimension of Zain's strategic planning is diversification of revenues. The company has been not only expanding, but also integrating its various platforms, particularly Zain Cash, Zain Life and its API platform, in order to provide additional functionality. It is also diversifying its workforce to make it more gender inclusive after appointing a new Chief Inclusion and Diversity Officer. In a similar vein, Zain introduced a platform for youth to promote development and empowerment. Other recent employee-related changes at Zain with a strategic orientation include fostering creativity among its employees and providing them with more opportunities than before.

Like Mobily and Go Atheeb, Zain is also strengthening its partnerships as a strategic approach with a number of global entities in order to enhance its products and services. Another strategic partnership is in the area of unmanned data acquisition, which Zain sees as a fast-developing market. For this, Zain introduced Zain Drone to provide more unified communications and managed services, and also to exploit opportunities related to providing IoT in a quicker, safer and more efficient manner. To be prepared for the evolving telecom landscape, Zain has a vision of "transforming into a fully integrated and innovative digital lifestyle provider and exceeding customers' expectations in all aspects" (Zain, 2018: 15).

Importantly, Zain's strategy includes dealing with regulations, which it sees as impediments. It is dealing with this situation by engaging with various stakeholders with the aim of shaping regulatory outcomes, removing those impediments considered unnecessary, and also to preserve values and facilitate its planned digital services.

CONCLUDING DISCUSSION

This study sought to uncover whether there is any evidence of strategic reorientation among Saudi telecommunications companies in line with the major economic changes taking place in Saudi Arabia, and whether these Saudi companies are developing organisational flexibility or not. The economic landscape is being transformed along a turbulent path to make Saudi Arabia more diversified and knowledge-based, less dependent on oil, and to help it achieve

its Vision 2030. Additionally, there is uncertainty due to global trends, geopolitical risks in the region, and the national anti-corruption drive. These turbulent and uncertain conditions necessitate strategic planning with foresight and preparedness or greater agility and adaptability for companies, or a combination of both.

Table 2 presents a summary of the indications obtained of foresightful strategic planning and organisational flexibility in the three Saudi telecommunication companies whose publicly available documents were examined. A comparison is drawn between these three players, namely Mobily, STC and Zain, which are the three largest in Saudi Arabia, to ascertain whether they are sufficiently prepared for the changing times and the Kingdom's economic transformation. All three of them show signs of both foresightful strategic planning and organisational flexibility.

Table 2: Indications of foresightful strategic planning and organisational flexibility

Company	Foresightful strategic planning	Organisational flexibility
Mobily	-RISE strategy -New positioning strategy -Data centre in "pole position for future growth" -Business intelligence practices -Market analysis -Future proofing of network for "a superior digital offering"	-"Striving to gain agility and efficiency" -Developing "a culture of efficiency" and "more effective operating model" -Capability to provide "the latest and most competitive solutions"
STC	-DARE strategy -Strengthening of asset base -Strengthening of customer base and brand -More effective use of databases for analysis -Strategic agreements and partnerships	-New flexible technical infrastructure introduced in 2018 -Digitisation of key procedures and employee services -Optimised organisational structure

	-Commitment to maintaining leading position -Frameworks, policies and procedures for dealing with various strategic and operational risks	-Programmes to improve organisational culture -Reduced operational costs
Zain	-Expansion strategy to provide latest connectivity -Introduction of new digital channels -Diversification of revenues and workforce -Fostering creativity among employees and giving them more opportunities -Strengthening of partnerships	-Optimisation and simplification of processes and services -Ecosystem devised to support decision-making based on AI and analytics -Integration of different platforms -Unified communications and managed services -Dealing with regulations to shape outcomes, preserve values and facilitate planned digital services

With respect to strategic planning, the three companies of Mobily, STC and Zain have arranged special strategies to cope with the changing environment and assist in their own transformation .Mobily has devised its RISE strategy, STC has devised its DARE strategy, and although Zain has not created a similar acronym, its strategic planning does have a similar orientation.

In comparison, all the telecommunication companies recognise the need for advancing their digital offerings in line with technological trends, as would be expected. Another commonality is the formation of strategic agreements and partnerships, and the strong focus and commitment to serving their customer bases. The latter is in consonance with the finding of Alam & Salim (2012) who also showed the association with customer satisfaction to be positive in the Saudi telecommunications sector in spite of Ali's (2017) finding of very low satisfaction among the customers themselves.

In addition, there is evidence that the companies are gearing to reposition themselves and expand under a growth strategy, except for STC which already enjoys the highest market share, and has therefore adopted a more modest strategy of simply maintaining its leading

position. Mobily's growth strategy includes establishing a new data centre, and Zain seeks to expand in terms of connectivity and digital channels.

As peculiar aspects of their strategic planning, besides the focus on customers, Zain is also focusing on its employees to foster more creativity among them and diversity its workforce; STC is focusing on making its databases more effective, and Mobily seeks to improve its business intelligence practices and in conducting market analyses. The latter is directly indicative of foresightedness and shrewdness, and this might confirm Kadash (2014) and Al Rawashdeh's (2015) conclusion of finding Mobily excelling the most, in their case in terms of service quality and profitability respectively. However, STC and Zain are not far behind, as STC is preparing for the future through strengthening its "frameworks, policies and procedures for dealing with various strategic and operational risks", and Zain through its focus on making its employees more creative and by "giving them more opportunities".

The strategy to make their organisational more flexible or agile is explicitly mentioned by Mobily, as the 'S' in its RISE strategy is specifically for "striving to gain agility and efficiency". Furthermore, Mobily is attempting to become more flexible by developing "a culture of efficiency". Similarly, STC is also optimising its organisational structure, reducing operational costs, and developing programmes to improve organisational culture. Moreover, STC has already introduced what it describes as a new flexible technical infrastructure in 2018. As for Zain, it is trying to gain greater flexibility through optimising and simplifying its processes and services, using AI to aid in decision-making, integrating its different platforms, and importantly, it is also seeking "to shape outcomes" in relation to government regulations.

Overall, there is evidence of both strategic foresight and measures being taken to increase organisational flexibility in all three of the Saudi telecommunications companies examined in detail, namely Mobily, STC and Zain. The agile strategies of these Saudi companies corroborates Migdadi's (2017) study and finding that this approach is strongest in Saudi Arabia along with Iraq among the Middle Eastern countries. However, whether Zain is the most agile of the three cannot be stated for certain and would require further investigation by means of qualitative data collection. As far as this current study is concerned, it is confirmed that at least the three major Saudi telecommunications companies are both foresightful in their strategic planning and also giving attention to developing organisational

flexibility as a reactive measure for longer-term security under uncertain and potentially turbulent economic conditions. This is advantageous because the companies can then adapt themselves quickly in line with changes.

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