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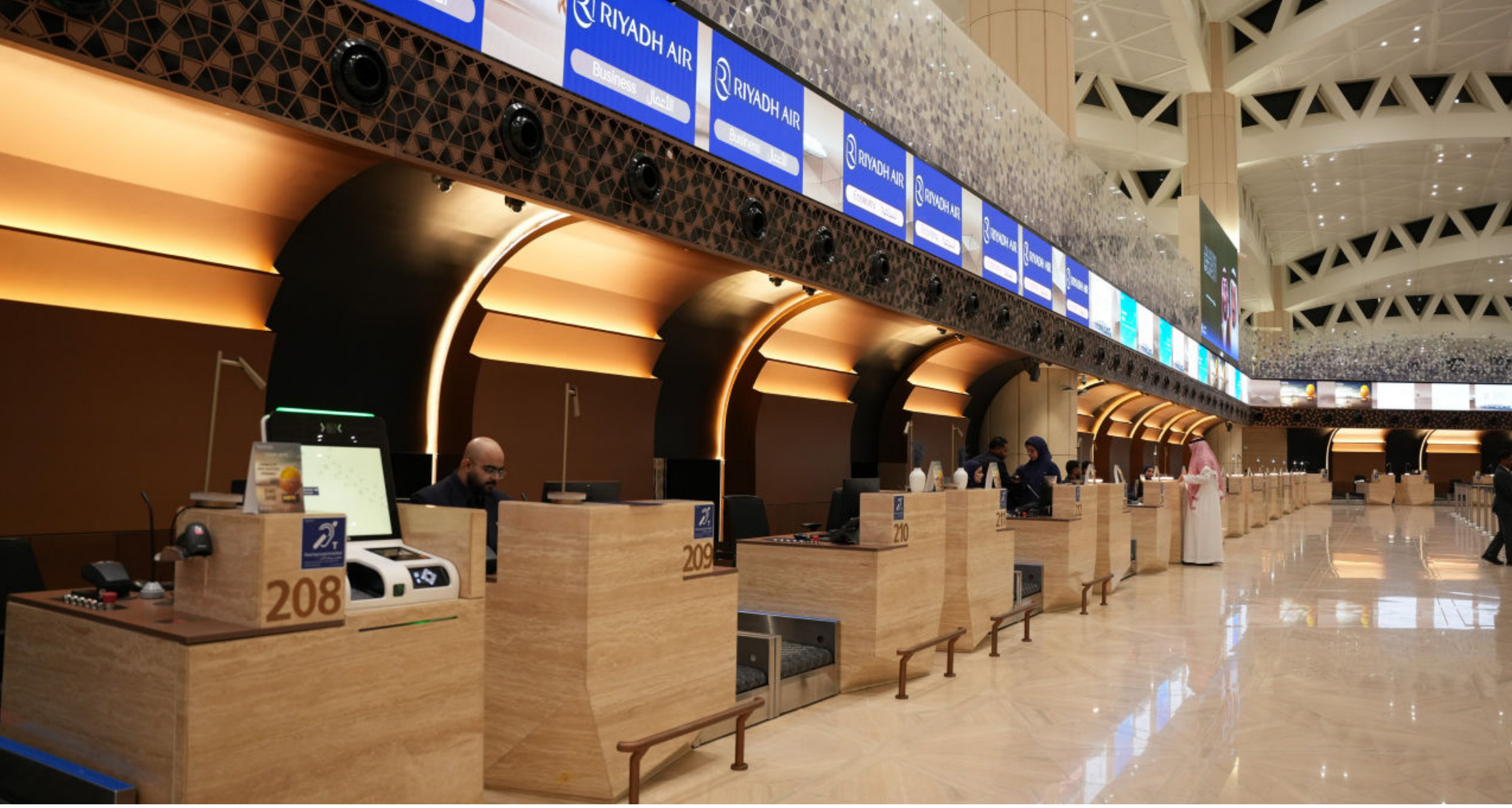
IBM

Building a digital-native airline:

How orchestration and integration powered Riyadh Air's launch

JULY 2026



Executive Summary

Riyadh Air didn't just launch an airline; it stood up a digital-native enterprise from scratch. The company built its technology platform and operating model simultaneously, without the drag of legacy systems, pursuing a clear commitment to its long-term technology vision.

IBM Consulting was engaged at the airline's inception, before Riyadh Air even had a full internal technology team. IBM helped define the technology strategy, structured the vendor selection process across hundreds of required capabilities, and served as the Master Systems Integrator responsible for holding the entire program together.

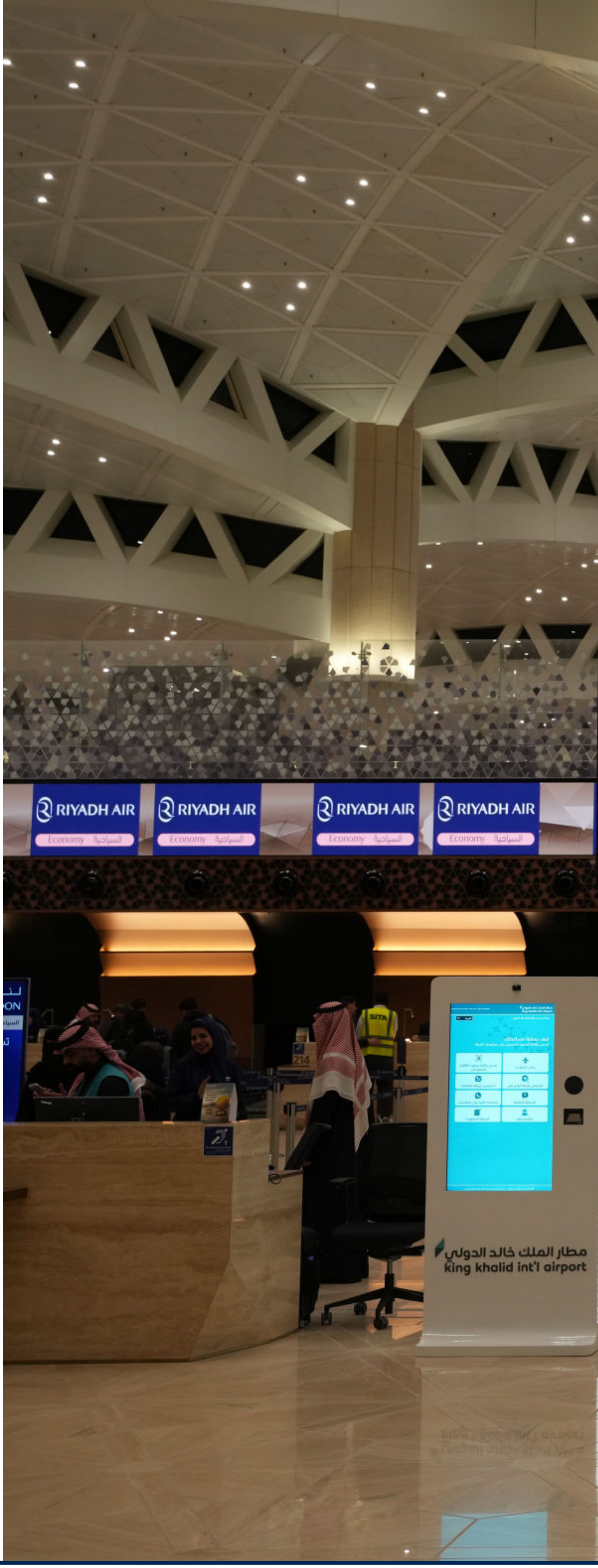
The commitment was immense. IBM Consulting deployed hundreds of professionals across Riyadh Air's launch ecosystem, supporting a lean internal organization operating within a highly complex, multi-partner environment. IBM served as the single accountable integrator for architecture, vendor coordination, and program delivery, orchestrating a unified operating system for the business. What made that accountability meaningful was IBM's willingness to hold the line on architectural decisions when schedule and cost pressures pushed for compromise.

IBM Consulting's approach enabled faster execution, reduced delivery risk, and established a scalable foundation for future growth. Although long-term financial metrics are still evolving (as expected for a pre-revenue airline preparing for a public launch), leading value indicators include speed to market, architectural flexibility, operating leverage, resilience, and launch readiness. IBM's dual role as an orchestrator and integrator was central to progress as they coordinated a broad partner ecosystem, enforced architectural discipline, and integrated systems and data across the program.

About This Case Study

Business Economic Value (BEV) is Futurum's methodology for evaluating the business and operational value that organizations derive from technology investments. Because long-term financial outcomes are still emerging for Riyadh Air, this case study emphasizes leading operational and strategic indicators of value rather than quantified financial outcomes.

Futurum Research developed this case study following an in-depth interview in March 2026 with Abe Dev, Senior Vice President for Digital, Technology, and Innovation at Riyadh Air, supplemented by briefing and supporting materials provided by IBM. IBM commissioned this case study, provided diligence materials, and introduced the customer; however, Futurum conducted the interview and analysis independently with full content and editorial control. The findings represent Futurum's independent, objective assessment of the business and operational value generated through the IBM Consulting partnership as reported by Riyadh Air.



Architecture Without Compromise

Most large technology programs begin with a clear target, but often deviate due to exceptions, interim workarounds, legacy system accommodations, and phased timelines. These factors can delay or permanently defer the original objective. Riyadh Air's strategy was different: define the target architecture once and build directly toward it, establishing a clear foundation for data, AI, and future operational scale.

This approach involved a commitment to a cloud-based, modular design in which all systems connected through a centralized integration layer rather than directly to each other. Riyadh Air consolidated operational data into a unified data architecture from the outset, leveraging Microsoft-based platforms to enable more intuitive, business-user-friendly access to enterprise data and insights. Microsoft Azure serves as the foundation for mission-critical workloads, enterprise AI infrastructure, and scalable digital platforms, while Azure Red Hat OpenShift supports the airline's custom digital development environment, making Riyadh Air one of the region's largest ARO deployments. Microsoft Dynamics 365 anchors the CRM ecosystem and integrates with Adobe Experience Cloud and other marketing platforms to support customer engagement and personalization. The strategy also prioritized third-party software services over custom-built systems, maintaining flexibility to adopt new capabilities as market conditions evolved.

Table 1: Platform Ecosystem Overview

Layer	Key Platforms	Purpose
Core Airline System	FLYR	Modern order-based commerce
Customer Experience	Adobe Experience Cloud	Marketing & engagement
CRM/Data	Microsoft Dynamics	Customer data management
Mobile Experience	Apple ecosystem	Native app development
AI & Automation	IBM watsonx	AI orchestration & concierge
ERP/Finance	Oracle Cloud EPM	Financial planning & close
IT Service Mgmt	ServiceNow	Enterprise service management

These decisions increased short-term complexity but eliminated an entire category of future costs. Mature airlines often spend years unwinding the debt of earlier compromises, such as deferred migrations and legacy replacements. Riyadh Air avoided that entirely by holding to a single target architecture from day one, even when pressure mounted to take shortcuts. **Riyadh Air effectively offset a substantial portion of its current investment by preventing expenditures it would otherwise incur in the future.**

> *"We only had one slide, which is the target architecture. We started with that and did not take any shortcuts."*
>
> Abe Dev, SVP, Digital, Technology and Innovation, Riyadh Air

IBM's involvement in this phase extended beyond technical delivery. IBM collaborated with Riyadh Air's leadership from the outset to define the architecture and enforce the discipline needed to avoid compromises and long-term technical debt. When schedule or cost pressures emerged, IBM maintained this discipline to prevent shortcuts and preserve architectural integrity.

One Partner, Full Accountability

Riyadh Air launched with an extensive ecosystem of over 75 technology vendors and service partners. Managing this complex environment required a single point of accountability to ensure proper integration of each component, end-to-end testing, and alignment of delivery across all parties. Riyadh Air engaged IBM Consulting as its Master Systems Integrator (MSI) to own this ecosystem.

Table 2: Program Scale & Complexity

Dimension	Number of Partners	System Integrations	Workstreams	Internal Team Size	Platforms Involved
Scale	60+	1,800+	59 parallel workstreams	~1,100 employees	Adobe, Microsoft, Oracle, FLYR, Apple

IBM Consulting was responsible for system integration, end-to-end testing, and coordination with specialist partners, including external firms handling cybersecurity and quality assurance testing independently. Multiple IBM development teams contributed to the customer-facing website and mobile application, loyalty platform, employee tools, and technology innovation initiatives. IBM Consulting Advantage provided the agentic AI infrastructure that coordinated delivery across teams and workstreams, connecting the execution model to IBM's broader platform capability. All teams operated within a unified governance structure, with IBM accountable for overall delivery.

Riyadh Air explicitly considered and rejected the alternative of dividing integration responsibilities across multiple partners. The airline's technology leadership had direct prior experience with multi-partner integration programs that suffered from coordination failures stemming from divided accountability. Managing this risk required one accountable owner. Abe Dev stated, "I've been in organizations where we've had multiple partners running the same project, and it's been an absolute mess."

IBM's executive engagement was a significant contributor to program quality. Executive sponsorship from IBM ensured consistent access to necessary resources and rapid resolution of escalations. Riyadh Air's technology leadership identified this sustained senior-level involvement, maintained through leadership transitions on both sides, as a key differentiator in the partnership. Abe Dev stated, "There are companies we've seen over the last four years who are good suppliers, but they've never transitioned over the line into being a good partner. From an MSI perspective, IBM's played their role."

Business Impacts Enabled by IBM Consulting

> ***"We can do in twenty-four to forty-eight hours what traditional airlines wait fourteen to twenty-eight days to analyze."***
>
> Abe Dev, SVP, Digital, Technology and Innovation, Riyadh Air

Riyadh Air's modern digital architecture and IBM's role in orchestrating and operating key ecosystem elements delivered early evidence of business value:

- Faster time-to-market for the business
- Rapid deployment of customer-facing capabilities
- The ability to execute marketing and digital engagement at scale

IBM enabled consistent execution within a complex environment by coordinating the large partner ecosystem, enforcing architectural discipline, and integrating systems and data across the program. This reduced execution risk, maintained alignment, and accelerated the execution of customer-facing capabilities across channels. IBM's work enabled Riyadh Air's team to quickly complete tasks that would typically require coordination across multiple partners, improving speed to market and responsiveness.

Early performance indicators were observed across marketing and digital platforms, including Adobe Experience Cloud, which served as a core foundation for campaign management, content delivery, and customer engagement. IBM played a central role in designing, integrating, and operationalizing these platforms within the broader ecosystem, including supporting campaign execution and content operations. Additionally, to advance Riyadh Air's enterprise finance transformation, IBM Consulting delivered key Oracle Cloud EPM capabilities, resulting in a clean, on-time financial close and new profitability and planning foundations. This established budgeting capabilities and a scalable finance operating model to support the rapidly growing startup airline's high-growth operating model.

IBM Consulting also led enterprise finance transformation for Riyadh Air through Oracle Cloud EPM capabilities, delivering a clean, on-time financial close and establishing new profitability and planning foundations. This work created budgeting capabilities and a scalable finance operating model suited to the airline's rapid growth trajectory.

Riyadh Air leveraged these capabilities to swiftly establish and scale customer engagement during pre-launch activity (see Table 3). They generated strong market interest by executing coordinated, multi-channel campaigns quickly and efficiently. Abe Dev noted, "We've had opportunities to push content across multiple channels in less than 24 hours with a team of fewer than 10 people, which is unheard of."

Table 3: Early Economic Value Indicators

Metric	Result
Page Visits (Pre-Launch)	6.7M+*
Subscriber Growth	2.3M+*
Campaign Execution Speed	<24 hours
Content Team Size	<10 people

* Source: IBM Consulting pre-briefing, November 2025.

Table 4 below places these results in context, comparing Riyadh Air's operational performance across four key capabilities against traditional industry baselines.

Table 4: Operational Performance Comparison

Metric	Industry Baseline	Riyadh Air
Route Profitability Analysis	Up to several weeks[1]	24 to 48 hours
Content Deployment at Scale	Multiple days, dedicated team[2]	Under 24 hours, under 10 people
Cabin Crew Recruitment	Weeks to months[3]	Days (mobile-based)
Core System Migration	Multi-year migration effort[4]	Within days

1 Anaplan, "The New Playbook for Airline Profitability" – legacy spreadsheet-based processes delay analysis by hours, days, or weeks. anaplan.com

2 Shopify, "The Flight Path to Profitability: Mastering Airline Industry Digital Transformation" (2025) – traditional campaigns require dedicated teams with days-to-weeks turnaround. shopify.com

3 Cabincrew24.com, "How Long Does It Take to Become Cabin Crew?" – end-to-end recruitment 2–6 months; British Airways documents 12–16 weeks. cabincrew24.com / careers.ba.com

4 Coforge, "Navigating the Complexities of Airline PSS Migrations" – core system migrations typically 3–5 years; major programs have exceeded a decade. coforge.com

Conclusion

Riyadh Air's launch demonstrates what IBM calls building a smarter business, where intelligence is not added onto existing operations but designed into the architecture from the start. By treating orchestration and integration as strategic leadership capabilities rather than coordination tasks, IBM Consulting enabled a pre-revenue airline to achieve a level of execution sophistication that typically takes established carriers years to develop.

The value of that approach is visible in outcomes that would have otherwise required larger teams, longer timelines, or costly course corrections. What distinguishes this program is not IBM's involvement alone, but that Riyadh Air's internal team retained clear ownership of the architecture throughout. This was a deliberate result of how IBM structured its accountability from the outset.

As Riyadh Air transitions to revenue operations, that foundation provides a compounding advantage. Systems already operating at scale, data flows already connecting across the enterprise, and a digital experience layer already proven in the market will not need to be rebuilt to serve a growing customer base. This is what a smarter business looks like before it becomes a bigger one, with architecture that performs, operations that scale, and a delivery model that leaves the customer in control.

Although long-term financial outcomes are still emerging, the early indicators are clear. Riyadh Air achieved speed-to-market, architectural flexibility, and operational readiness at launch – foundational benefits that position the airline to sustain BEV as its route network expands and matures.

Important Information About This Report

AUTHORS

Donald Jin
Research Director, Business
Economic Value | The Futurum Group

PUBLISHER

Futurum Research

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CONTACT INFORMATION: The Futurum Group LLC I futurumgroup.com I (833) 722-5337