

GoJek's Trajectory in Southeast Asia: Disruption, Growth, and Emerging Challenges

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Introduction

By January 2025, GoJek has firmly established itself as one of Southeast Asia's most prominent tech conglomerates, known for on-demand ride-hailing, digital payments, e-commerce facilitation, and more. Founded as a small motorbike taxi-call centre in 2010, the company has evolved to become a multi-service platform offering everything from personal transport to food delivery, courier services, home cleaning, and financial services. Building on Indonesia's rapid digital adoption, GoJek has played a central role in reshaping urban mobility, small business empowerment, and consumers' digital habits. Yet, the journey has not been without hurdles; the company has faced significant competition, complicated regulatory frameworks, and operational controversies, including allegations that it discourages driver unionization. This essay delves deep into GoJek's transformative trajectory as a disruptive force, mapping out the social, economic, and regulatory implications of its business model.

By placing GoJek's expansion and challenges in context, this discussion will provide an objective view of whether its business qualifies as a "disruptive innovation" and how it has reshaped the Indonesian—and by extension, the Southeast Asian—digital economy. The analysis will also highlight how GoJek navigates issues of unionization, technology investment, and strategic alliances in an increasingly competitive market.

The Indonesian mobility and service sector before GoJek

Historically, Indonesia's vast population—around 275 million by the early 2020s—has struggled with chronic traffic congestion and limited formal public transportation infrastructure². Before 2010, informal motorcycle taxis, known locally as *ojek*, were ubiquitous but lacked consistent fare structures and formal oversight. In most urban centres, standard

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² Faizar et al., [ResearchGate](#)

passenger transport was dominated by a mix of private car usage, unregulated motorcycle taxis, and metered taxis—often leading to inefficiencies and unreliable pricing³.

For years, local motorbike taxi drivers relied on direct street hails or neighbourhood stands (*pangkalan*), with fares determined through on-the-spot negotiation. This left ample room for inconsistent service quality and occasional conflicts between drivers and passengers. As smartphone adoption accelerated, tech-savvy consumers increasingly demanded faster, more convenient means of urban mobility—a gap into which GoJek eventually expanded.

GoJek's emergence: The early disruption

GoJek was founded in 2010 by a group led by Nadiem Makarim⁴, initially as a call centre that connected riders with motorbike taxi drivers. This modest start was set against the backdrop of limited regulation in Indonesia for app-based transportation, effectively giving GoJek an open field. In early years, the company capitalized on three core factors:

1. **Smartphone adoption:** By 2015–2016, Indonesia's mobile internet penetration had surpassed 40%. This growing digital infrastructure facilitated the real-time connection between customers and drivers⁵.
2. **Service gaps:** Traditional *ojek* services were notoriously unregulated. GoJek's introduction of standard, upfront pricing and digital tracking brought a level of reliability that appealed to urban dwellers and eventually led to a new consumer base.
3. **Informal workforce:** Indonesia had large numbers of informal workers seeking reliable income. Partnering with GoJek was relatively straightforward, which helped the company scale its driver network quickly.

By 2015, GoJek launched a dedicated mobile app for Android and iOS. Offering real-time booking and an in-app wallet, this leap signalled the onset of a broader “super-app” ecosystem (Christensen and Raynor, *The Innovator's Solution*). Over the next two years—during which it attracted major funding from Sequoia Capital, DST Global, and others—the company rapidly expanded from motorbike ride-hailing (*GoRide*) into other verticals like food delivery (*GoFood*), courier services (*GoSend*), and e-wallet services (*GoPay*).

³ Barreto et al., cited in [Disruptive Innovation of Gojek](#)

⁴ Prananda et al., [Matingley Publishing](#)

⁵ Statista, [Internet Usage in Indonesia](#)

Scaling up with capital infusions and product diversification

By 2018 and 2019, GoJek had secured multiple investment rounds from marquee names such as Google, Temasek, and Facebook, catapulting its valuation to above US\$10 billion⁶. These cash infusions fuelled expansions into new services and adjacent markets:

- **On-demand services:** GoCar (ride-hailing with cars), GoBox (truck and cargo services), GoClean, and GoMassage broadened the scope of the platform.
- **Digital finance:** Acquisitions of fintech startups (Kartuku, Midtrans, and Mapan) in 2017–2018 and subsequent integration expanded GoPay’s penetration, allowing for peer-to-peer transactions, bill payments, and micro-loans⁷.
- **Regional expansion:** GoJek forayed into Vietnam (as GoViet), Thailand (as Get), Singapore, and eventually into e-commerce partnerships with Tokopedia under the GoTo Group umbrella⁸.

Simultaneously, the company leveraged data analytics and machine learning (ML) on Google Cloud for route optimization, demand forecasting, and dynamic pricing⁹. This tech-driven approach helped GoJek manage massive data flows—up to 5 terabytes daily—and position itself as a digital trailblazer in Southeast Asia.

Innovations and ecosystem beyond mobility

While ride-hailing remains GoJek’s flagship, its ecosystem has grown increasingly integrated:

1. **Food delivery and culinary ecosystem:** With GoFood, the company not only offers logistical advantages to restaurant partners but also promotes local micro-entrepreneurs who otherwise lack a formal digital presence.
2. **Financial inclusion:** GoPay and later expansions like micro-insurance and pay-later features have provided underbanked populations with essential financial tools¹⁰.
3. **Merchant support:** Through various digital solutions, GoJek has empowered small retailers to manage orders, accept digital payments, and even perform bookkeeping tasks digitally.

⁶ Cosseboom, [Tech in Asia](#)

⁷ Reuters, [Indonesia’s Go-Jek Acquires Three Companies](#)

⁸ CNBC, [GoTo Some Goodwill in 2023](#)

⁹ Google Cloud, [GO-JEK: Using Machine Learning](#)

¹⁰ Lembaga Demografi FEB UI, [Go-Jek’s Impact on the Indonesian Economy](#)

This “super-app” model replicates a global trend, reminiscent of WeChat in China or Grab in Southeast Asia. GoJek’s approach is distinct in how it was originally rooted in motorbike mobility, layering multiple services atop that initial user base¹¹.

Controversies and Challenges

Despite its achievements, GoJek has encountered a host of challenges that underscore the complexities of scaling in emerging markets:

1. **Regulatory Ambiguity:** When it first launched app-based motorcycle taxis, Indonesian transport laws did not recognize two-wheelers as formal public transport. Conflicting ministerial decrees over the years complicated GoJek’s operations, at times leading to partial bans in certain regions¹².
2. **Unionization Concerns:** Investigations suggest that GoJek’s peer-support driver groups—often dubbed “communities”—foster loyalty but also discourage formal unionization¹³. Critics argue these communities, sanctioned by the company, reduce the likelihood of organized labour demands and minimize public protests.
3. **Competition with Grab:** Since Grab’s acquisition of Uber in Southeast Asia (concluded in early 2018) and GoJek’s own acquisitions, the two “super-apps” have waged fierce battles over market share. Beyond ride-hailing, each competes for e-wallet dominance, food delivery scale, and regional expansions.
4. **Profitability Pressures:** Like many consumer tech companies, GoJek historically prioritized market share over immediate profitability. This led to speculation around sustained cash burn and investor patience. Concerns intensified with the broader tech funding slowdown in 2023–2024, putting further emphasis on stable unit economics.

Financial sustainability and ongoing evolution

GoJek’s financial outlook has often oscillated between optimism about its revenue growth and concerns about operational overheads. The combined GoTo Group, formed by GoJek’s merger with Tokopedia in mid-2021, initially had a valuation close to US\$31 billion upon listing but later saw a contraction due to macroeconomic pressures¹⁴. Tokopedia’s slower-than-expected revenue growth led to a goodwill impairment that significantly impacted the joint entity’s 2023 income statement.

Still, operational indicators suggest GoJek’s ride-hailing and food delivery segments remain high-growth businesses. The strategic move in late 2023, wherein TikTok acquired a majority

¹¹ Ibarra et al., cited in [Disruptive Innovation of Gojek](#)

¹² CNN Indonesia, [Menhub Larang Go-Jek](#)

¹³ Rest of World, [How Gojek keeps its gig riders close—and away from unions](#)

¹⁴ The Diplomat, [Why TikTok Showed Indonesia’s GoTo Some Goodwill in 2023](#)

stake in Tokopedia, aimed to relieve GoTo of its intangible-heavy balance sheet and free capital for ride-hailing, fintech, and AI development¹⁵. As a result, GoJek's management is increasingly focusing on its core strengths of on-demand transport, payments, and integrated daily-use services, signalling a renewed drive for consistent profitability by 2025.

Lessons on organizational culture and leadership

A distinct hallmark of GoJek's success lies in its internal culture of rapid innovation. Multiple interviews with former employees describe GoJek's "bottom-up innovation," in which frontline teams propose new feature ideas, solutions, or expansions¹⁶. The company's flat hierarchy and acceptance of "fast failures" contributed to swiftly scaling multiple verticals—from payment tools to on-demand cleaning services. GoJek's founding team also garnered significant clout among global investors, ensuring the capital necessary for expansions and acquisitions.

However, leadership transitions in 2019–2020 and Nadiem Makarim's departure to serve in the Indonesian government introduced new dynamics. While the company has maintained a stable leadership structure and continued to innovate, some critics argue that early "transformational leadership" was diluted post-2020¹⁷.

Policy, labour, and regional ecosystem

The legal vacuum for motorcycle-based ride-hailing in Indonesia during GoJek's early years enabled it to scale quickly without facing immediate legal obstacles. Over time, the Indonesian government attempted to regulate online ride-hailing via ministerial decrees. But new rules often triggered protests by conventional taxis, local bus operators, and *ojek* stands. Only in 2019 did authorities formalize frameworks recognizing app-based motorcycle taxis (PM No. 12/2019). Nonetheless, consistent policy remains challenging, with local governments interpreting or enforcing the law differently.

Beyond mobility, the regulatory environment for digital finance in Indonesia also evolved. Bank Indonesia introduced e-money regulations that demanded licensing for GoPay. For the most part, government agencies viewed mobile payments as instrumental for financial inclusion, giving impetus to GoJek's GoPay expansions¹⁸.

¹⁵ The Diplomat, [Why TikTok Showed Indonesia's GoTo Some Goodwill in 2023](#)

¹⁶ Episode 7, [Go-Figure Gojek](#)

¹⁷ Radhi and Pramuditya, [Disruptive Innovation of Gojek Indonesia](#)

¹⁸ Faizar et al., [ResearchGate](#)

1. Extended regulatory implications in Indonesia

As GoJek rapidly expanded its scope beyond simple ride-hailing, the Indonesian government found itself needing to adapt long-standing transportation laws to a platform-based business model. Previously, motorcycles were not legally acknowledged as formal public transport under the National Traffic and Transport Law (Law No. 22/2009). By operating in a regulatory gray area, GoJek benefited from a lack of clear licensing requirements or official tariff regulations for two-wheeled vehicles.

This lack of legal clarity sparked discontent among incumbent transportation providers (traditional taxis, minibus services, and regular *ojek*). Starting in 2015, the Ministry of Transportation introduced or revised regulations to define the nature of app-based taxi operations. Nonetheless, these regulations primarily covered four-wheeled transportation. It took until 2019 for the government to release PM No. 12/2019, which expressly acknowledged that motorcycles could be used to serve the public interest, even though they were still not formally categorized as “public transport.” This regulation effectively gave GoJek legal breathing space but did not entirely end controversies at the local level.

Various local governments within Indonesia have at times placed selective bans or added restrictions on GoJek. For instance, certain regional authorities in West Java initially disallowed ride-hailing bikes in specific municipal areas, citing local transport law conflicts or road safety concerns. This patchwork of regulations created complexity in scaling GoJek’s operations seamlessly across the archipelago. Despite these hurdles, GoJek often negotiated with municipalities, highlighting job creation and user demand as leverage.

Notable gaps

Even under the updated regulatory regime, critical areas still lack comprehensive oversight, such as driver insurance, wage security, and formal labour protections¹⁹. While GoJek offers in-app insurance for accidents occurring during rides, some driver representatives argue for more robust government intervention—comparable to the regulations covering conventional metered taxis. The tension between minimal regulation (which allowed rapid growth) and emerging pressure for driver protection remains a key aspect of GoJek’s trajectory.

2. Divergence of interests in labour and worker welfare

From the outset, GoJek’s gig drivers were classified as independent “partners” rather than employees. This arrangement allowed GoJek to scale quickly, as it bore no direct responsibility for driver payroll, benefits, or guaranteed working hours. However, it also meant that drivers

¹⁹ CNN Indonesia, [Menhub Larang Go-Jek](#)

had to pay for their own motorcycles, fuel, maintenance, and insurance beyond what GoJek's limited coverage provided.

Community building vs. union avoidance

Research by Rest of World ([How Gojek keeps its gig riders close — and away from unions](#)) underscores that GoJek-sponsored driver “communities” often serve as both peer-support networks and informal channels for conflict resolution. These groups are typically led by senior drivers or local influencers who relay driver grievances to management, enabling quick fixes for common issues such as suspended accounts or app glitches. While this organizational style is pitched as “community building,” labour experts argue it simultaneously discourages formal labour unionizing, since drivers can address routine disputes internally without mounting collective bargaining or protests.

Some driver advocates view these communities as positive, enabling a sense of camaraderie and real-time peer-to-peer help. However, others claim that independent union efforts are implicitly discouraged. In interviews (Rest of World, [ibid.](#)), drivers with union affiliations reported being sidelined or labelled as “difficult,” putting them at risk of deactivation.

Economic uncertainties for drivers

Another long-term labour challenge includes dynamic fares. While initial per-kilometre rates appeared lucrative compared to traditional *ojek*, these rates have shifted over time, often downward, as GoJek moves to optimize operations. Surges in driver supply, local competition, and frequent promos have also led to less consistent driver incomes. Some drivers fear that GoJek's emphasis on discount-driven market capture undermines their income potential, as the company recovers promotional costs by adjusting driver commissions.

Despite these tensions, surveys indicate that many GoJek drivers perceive their net earnings as higher than in alternative low-skill jobs. Additionally, flexible scheduling still appeals to those who rely on gig work to supplement other income. Nevertheless, the evolving gig economy model fosters ambiguities in long-term employment security, a topic that critics suggest remains insufficiently addressed by both GoJek and Indonesian lawmakers²⁰.

3. Competitive landscape beyond Grab

While GoJek's rivalry with Grab dominates headlines, smaller local startups and specialized platforms also compete in niches GoJek has historically claimed. For instance:

²⁰ Katili et al. in [Transportation Research Interdisciplinary Perspectives](#)

- **Blu-Jek** briefly emerged as another motorbike ride-hailing service focusing on Jakarta but struggled to match GoJek's brand recognition and app sophistication.
- **Maxim** (originating from Russia) entered Indonesia around 2019, offering lower commission structures for drivers.
- **AirAsia Ride** has shown interest in certain markets, leveraging the airline's brand, though actual traction remains limited.

These competitors may not dethrone GoJek or Grab in the short run but can chip away at localized user bases or driver pools by offering promotional fares. GoJek's strategy to retain rider loyalty includes periodic cashback schemes, discount codes, and cross-platform loyalty points redeemable across various GoJek services. Yet, many consumers remain price-sensitive, downloading multiple ride-hailing apps and opting for the cheapest real-time fare²¹.

4. Diversification into digital financial services: “Banking the unbanked”

GoJek's investments in fintech go far beyond GoPay e-wallet offerings. The acquisitions of Midtrans, Kartuku, and Mapan in 2017–2018 gave GoJek a foundational infrastructure to process card-based payments, online transactions, and peer-to-peer lending. Over time, these integrated solutions evolved into more comprehensive “financial inclusion” features, such as microloans for informal merchants and insurance programs for drivers.

Impact on SMEs

Food stall operators, market merchants, and other small enterprises gained the ability to receive digital payments with minimal setup, enabling them to expand their customer bases. Many of these merchants are “unbanked” or “underbanked,” lacking formal credit history. By partnering with GoPay, they could build transaction records that potentially serve as a basis for micro-credit.

A 2019 study from Lembaga Demografi FEB²² found that micro-entrepreneurs on GoJek's platform saw an average 20-30% sales boost post-integration. Nonetheless, some complaints arise about the commissions or fees for GoFood or GoPay, which can range between 15-20% of transaction values for smaller merchants. These fees may erode margins for vendors already operating at tight profitability. GoJek counters by highlighting the higher overall sales volume and brand exposure that come with a presence in its app ecosystem.

Toward a “Super-App” ecosystem

²¹ Chopdar and Balakrishnan, cited in [Katili et al.](#)

²² UI ([Go-Jek's Impact on the Indonesian Economy](#))

Beyond basic money transfers, GoJek has incrementally launched add-on financial services—mobile phone top-ups, personal investment links, even “pay later” functionalities. The strategy aligns with other Asian super-apps (e.g., WeChat in China, Grab in Southeast Asia), aiming to consolidate a user’s daily financial and transactional needs into a single platform. The ambition is multifaceted: it locks users into GoJek’s environment while also generating user data that can inform future service innovations or credit-scoring models.

5. GoJek’s technology infrastructure

One reason for GoJek’s ability to scale quickly is its robust backend infrastructure, built on cloud computing and big data analytics²³. With real-time pings from potentially hundreds of thousands of drivers, GoJek processes large data sets on user location, traffic patterns, and demand surges. Machine learning (ML) models forecast busy areas and adjust fare multipliers in real time to balance driver supply.

Strategic acquisitions of Indian startups

In 2016 and 2019, GoJek acquired Indian tech firms C42 Engineering, CodeIgnition, and AirCTO, establishing an engineering hub in Bangalore²⁴. These acquisitions boosted GoJek’s capacity for product development, especially in advanced AI/ML for recruitment, fraud detection, and process automation. The skilled labour pool in India complemented Indonesia’s local talent, expanding GoJek’s capacity to iterate quickly on new features.

6. GoJek in Southeast Asia and global comparisons

By 2020–2022, GoJek expanded services into Vietnam (GoViet), Thailand (GET), and Singapore under its own brand. Each market brought unique regulatory and competitive challenges, especially in Singapore, where Grab had already established a dominant position post-Uber exit²⁵. GoJek introduced motorbike ride-hailing in Vietnam and Thailand but had to limit itself to car-based services in Singapore, given local constraints on motorcycle taxi usage.

Consumer trust and loyalty

GoJek’s super-app strategy relies heavily on user trust and loyalty. Pricing transparency, real-time driver matching, and safety features (like driver background checks and user-rating systems) initially fostered consumer confidence. However, competition with Grab, local

²³ Google Cloud, [GO-JEK: Using Machine Learning](#)

²⁴ Tech in Asia, [Sequoia Capital invested in Indonesia’s Go-Jek](#)

²⁵ CNBC, [Indonesia’s Go-Jek Announces \\$500 Million Expansion](#)

players, and occasional controversies—such as alleged driver exploitation or discontent with updated commission structures—have tested that trust²⁶.

A study on ride-hailing loyalty programs in Indonesia found that while app-based perks (like token or point-based programs) increase short-term engagement, they do not necessarily translate into long-term loyalty if price-sensitive customers see cheaper alternatives²⁷. This tension underscores the delicate balance between investing in loyalty inducements and operating on razor-thin margins.

Coexistence or full disruption?

GoJek emerged from a low-end, often unregulated corner of the mobility market—motorcycle taxis—and upended broader transportation norms. While it arguably “disrupted” traditional taxi services, it has also coexisted with incumbents through partnerships (e.g., acquiring shares in Blue Bird, a major taxi operator) and cross-platform arrangements²⁸. Despite shifting consumer behaviour toward app-based solutions, pockets of traditional transport remain, especially outside major urban hubs.

Similarly, the incumbents now adapt digital solutions. Blue Bird offers app-based bookings, and some local governments have introduced official ride-hailing alternatives. A partial synergy emerges: while GoJek’s brand redefined mobility, a total displacement of old systems remains unlikely. Instead, the market has trended toward a “hybrid equilibrium,” with digital innovation blending into conventional practices.

Conclusion

GoJek’s rise from a small motorbike taxi call centre to a multi-billion-dollar “super-app” epitomizes how digital transformation can generate both vast market opportunities and formidable controversies. By bridging vast informal sectors with new technology solutions, GoJek expanded beyond transport to become a diverse platform—an ecosystem facilitating payments, food delivery, logistics, and more. Its story offers a textbook case of disruptive innovation in a developing-market context: capitalizing on regulatory gaps, building a strong brand around convenience and pricing transparency, and securing substantial global investment to fund rapid product diversification.

But GoJek’s future trajectory is not without uncertainties. Fierce competition with Grab, intensifying calls for driver protection, and ongoing regulatory ambiguities demand careful navigation. The partial divestment of Tokopedia to TikTok in late 2023 highlights GoJek’s

²⁶ Rest of World, [How Gojek keeps its gig riders close—and away from unions](#)

²⁷ Katili et al., [Transportation Research Interdisciplinary Perspectives](#)

²⁸ The Jakarta Post, [Go-Jek, Blue Bird partnership](#)

renewed focus on its core verticals. Whether it can maintain its pioneering stance depends on balancing profitability targets, continued service innovation, responsible labour practices, and alignment with evolving regulatory frameworks. By all measures, the company stands as both a catalyst for socio-economic modernization in Indonesia and a focal point for ongoing debates about platform work, data-driven services, and the sustainability of digital “mega-platforms” in Southeast Asia.

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