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Gojek's Dominance Strategy Amid the Disruption of Indonesia's Digital Transportation Ecosystem

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Abstract: *This study aims to analyze Gojek's market dominance strategy in responding to disruptions within Indonesia's digital transportation ecosystem, which is characterized by intensified multi-sector competition and rapid platform-based innovation. The research adopts a descriptive qualitative approach, positioning Gojek as the primary object of analysis. The study utilizes secondary data obtained from industry reports, academic publications, corporate documents, and relevant market research reports. Data collection is conducted through documentation review and literature study, while data analysis employs thematic content analysis to identify key patterns, themes, and strategic orientations. The analytical framework incorporates PESTEL analysis to examine macro-environmental factors, Porter's Five Forces to assess industry competition intensity, and SWOT analysis to map the company's internal strengths and weaknesses alongside external opportunities and threats. The findings indicate that Gojek's market dominance strategy relies on strengthening its platform ecosystem, leveraging network effects, differentiating services through a super-app model, and implementing cross-service synergies. Nevertheless, high competitive pressure, user multi-homing behavior, and disruptive innovations introduced by competitors present significant challenges to the sustainability of Gojek's market leadership. This study contributes theoretically to the literature on digital platform strategy and provides practical insights for stakeholders in Indonesia's digital transportation industry.*

Keyword: *Digital Transportation, Disruptive Innovation, Gojek, Market Dominance Strategy, Platform Ecosystem.*

Abstrak: Penelitian ini bertujuan untuk menganalisis strategi dominasi pasar Gojek dalam menghadapi disrupsi ekosistem transportasi digital di Indonesia yang ditandai oleh meningkatnya persaingan lintas sektor dan inovasi platform digital. Penelitian menggunakan

pendekatan kualitatif deskriptif, di mana Gojek diposisikan sebagai objek kajian utama. Data penelitian bersumber dari data sekunder yang meliputi laporan industri, publikasi akademik, dokumen perusahaan, serta laporan riset pasar yang relevan. Teknik pengumpulan data dilakukan melalui studi dokumentasi dan studi literatur, sedangkan analisis data menggunakan analisis konten tematik untuk mengidentifikasi pola, tema, dan strategi utama yang diterapkan oleh Gojek. Kerangka analisis yang digunakan meliputi analisis PESTEL untuk mengkaji faktor lingkungan makro, Porter's Five Forces untuk menilai intensitas persaingan industri, serta analisis SWOT untuk memetakan kekuatan, kelemahan, peluang, dan ancaman perusahaan. Hasil analisis menunjukkan bahwa strategi dominasi Gojek bertumpu pada penguatan ekosistem platform, pemanfaatan efek jaringan, diferensiasi layanan melalui model super-app, serta strategi sinergi lintas layanan. Namun demikian, tingginya tingkat persaingan, perilaku multi-homing pengguna, serta inovasi disruptif dari pesaing menjadi tantangan utama bagi keberlanjutan dominasi pasar Gojek. Penelitian ini diharapkan dapat memberikan kontribusi teoretis dalam kajian strategi platform digital serta menjadi referensi praktis bagi pelaku industri transportasi digital di Indonesia.

Kata Kunci: Strategi Dominasi Pasar, Transportasi Digital, Ekosistem Platform, Inovasi Disruptif, Gojek.

INTRODUCTION

Over the past decade, Indonesia's digital transportation landscape has undergone a massive transformation. The shift in consumer behavior toward mobile application–based lifestyles has intensified competition among on-demand service providers (Michael E. Porter, 2008; Formatting Citation; (Parker, G. G. et al., 2016). Amid these dynamics, Gojek emerged as a pioneer of app-based transportation services in 2015, evolving from a simple online motorcycle taxi service into a super-app ecosystem encompassing transportation services (GoRide, GoCar), food delivery (GoFood), digital payments (GoPay), logistics (GoSend, GoBox), and financial services (GoInvestasi) (Jacobides et al., 2018a)(IBK BANK Indonesia, 2021).

However, Gojek's dominance is currently facing significant pressure. According to data.ai (2024), Gojek's market share in the ride-hailing sector declined from 57% in 2020 to approximately 43% in 2024, alongside the increasing penetration of Grab, which reached 48%, and Maxim, which rapidly expanded to 9% within the new-user segment through its low-price strategy. In the food delivery sector, ShopeeFood emerged as an aggressive new competitor with an estimated market share of 25%, approaching GoFood (40%) and GrabFood (35%) (Online Food Delivery Market Indonesia., 2024).

Competitive disruption has also emerged within the logistics segment. Companies such as Lalamove and Deliveree have successfully captured portions of the goods-delivery market previously dominated by GoSend and GoBox. Research indicates that Lalamove recorded transaction growth of 38% during 2023–2024, while Deliveree secured approximately 42% of the on-demand corporate logistics market, particularly in intercity delivery services that Gojek has struggled to optimize. These conditions demonstrate that Gojek's ecosystem is facing cross-sectoral threats from competitors operating with leaner and more specialized business models.

This phenomenon represents a clear manifestation of disruptive innovation, as proposed by Christensen et al. (2018) whereby new entrants equipped with operational efficiency and adaptive technology are capable of challenging incumbent dominance. Grab and Maxim pressure Gojek through pricing strategies and geographic expansion, while ShopeeFood and Lalamove challenge Gojek's advantages through e-commerce integration and logistics

efficiency. Consequently, Gojek is no longer competing solely in the online transportation sector, but also within an increasingly complex integrated digital services ecosystem.

The concept of competitive advantage proposed by Porter (2016) emphasizes that firms may achieve superior positioning through strategies of differentiation, cost leadership, or focus. Within the context of digital transportation, competitive advantage is derived not only from cost efficiency but also from the ability to integrate service innovation, technology, and user experience.

For Gojek, the combination of differentiation through its super-app ecosystem and cost leadership through algorithmic efficiency and data-driven pricing has become the foundation for sustaining competitiveness. Nevertheless, the emergence of Grab and Maxim with similar strategic approaches indicates that Gojek's competitive advantage is currently experiencing an erosion effect, in which innovations are rapidly imitated and differentiation becomes increasingly narrow (Nur Selinda, 2024).

Christensen (1997) explains that disruptive innovation occurs when new entrants offer simpler, cheaper, and more efficient solutions for underserved market segments. This phenomenon is clearly evident within Indonesia's digital transportation ecosystem. Grab competes with Gojek through regional integration strategies and cross-border loyalty programs, Maxim leverages ultra-low-price penetration strategies, while ShopeeFood utilizes the strength of e-commerce ecosystems to redirect customer traffic toward its food delivery services. In the logistics sector, Lalamove and Deliveree introduce delivery efficiency through professional fleet systems, thereby exerting pressure on GoSend and GoBox. This multi-sector disruption indicates that Gojek is not only confronting intra-industry competition but also facing challenges from cross-industry competitors entering through digital innovation and operational efficiency.

According to Jacobides et al. (2018), the primary strength of modern digital firms lies in platform ecosystems—collaborative systems that connect users, partners, and service providers within a unified value architecture. In this context, network effects become a critical source of market dominance: the greater the number of users and partners joining the platform, the higher the value generated for all participants (Parker et al., 2016).

Gojek initially gained a competitive advantage through strong network effects in the transportation and food delivery sectors. However, multi-homing behavior—the tendency of users and partners to engage with multiple platforms simultaneously—has reduced the exclusivity of Gojek's network. Grab and Maxim have successfully attracted driver-partners through dynamic incentive schemes, while ShopeeFood and Lalamove have strengthened their positions through extensive merchant and independent driver networks. Consequently, the effectiveness of Gojek's future strategy will largely depend on its ability to preserve network effects and strengthen synergies among interconnected services within its ecosystem.

Innovation has become a key factor in sustaining long-term competitive differentiation. According to Schumpeter (2017), innovation represents a process of creative destruction that continuously renews market value in dynamic industries. In practice, Gojek has pursued innovation through enhanced safety features (GoCar Protect), affordable service options (GoRide Hemat), and the utilization of artificial intelligence and big data to improve fleet allocation efficiency (Tzika-Kostopoulou et al., 2024). However, the high degree of imitation by competitors indicates that rapid innovation must be accompanied by systemic innovation, such as cross-service integration and the strengthening of sustainability-oriented branding Mohammadi et al. (2023) demonstrate that eco-innovation can enhance customer loyalty within the digital transportation sector. This presents a strategic opportunity for Gojek to develop a green mobility strategy aligned with Indonesia's transition toward electric vehicles.

According to Kotler & Keller Lane (2019), market dominance strategy focuses on increasing market share, strengthening customer loyalty, and controlling the value chain.

Within digital ecosystems, dominance no longer merely refers to market share leadership, but also to the ability to define industry standards through innovation and service interconnectivity. Carnahan et al. (2010) argue that the dominance of digital platforms heavily depends on lock-in strategies and cross-subsidization mechanisms that make it difficult for users to switch platforms. This model is reflected in Gojek's integration of GoPay, GoFood, and GoRide within a unified ecosystem. Nevertheless, Gojek's current challenge lies in maintaining user stickiness amid the growing availability of cross-sector substitutes. Therefore, a value-based dominance strategy is required rather than one relying solely on transaction volume.

PESTEL analysis is a framework used to evaluate the influence of macro-environmental factors on organizational strategy and performance. According to Yüksel (2012), PESTEL is particularly important in dynamic business environments because it systematically identifies external opportunities and threats. The framework consists of six major dimensions: Political, Economic, Social, Technological, Environmental, and Legal.

Porter's Five Forces model was developed by Michael E. Porter (2008) as a tool for analyzing industry competition and identifying external forces affecting corporate profitability. The model comprises five elements: threat of new entrants, threat of substitutes, bargaining power of suppliers, bargaining power of buyers, and industry rivalry.

Previous studies indicate that Gojek has implemented several strategic initiatives to maintain its market position. Prathama (2025) highlights the impact of artificial intelligence (AI) implementation on operational efficiency, decision-making speed, business sustainability, and Gojek's competitive advantage within Indonesia's technology industry. The findings suggest that AI significantly improves operational efficiency and strengthens competitiveness through service innovation. Nur Selinda (2024) emphasizes Gojek's contribution to MSME digitalization, while Alex Chandra et al. (2023) examine the relationship between customer experience—including digital interfaces, digital services, and experiential dimensions—and user loyalty within the digital era. These findings are relevant to discussions regarding user loyalty. Nevertheless, prior studies have generally focused on product innovation and socio-economic impacts, without specifically examining Gojek's market dominance strategy amid multi-sector disruption and changes in Indonesia's digital competitive structure.

Therefore, this study is designed to analyze Gojek's strategy in maintaining and strengthening its dominance within Indonesia's digital transportation market, while considering competitive pressures from Grab, Maxim, ShopeeFood, Lalamove, and Deliveree as the primary disruptive forces. This research is expected to provide strategic insights into how Gojek can adapt its business model, service innovation, and ecosystem synergies in order to remain relevant and competitive within an increasingly crowded and dynamic digital market.

METHOD

This study employed a descriptive qualitative approach. This approach was selected because the objective of the research was to comprehensively analyze Gojek's dominance strategy in responding to the disruption of Indonesia's digital transportation ecosystem. A qualitative approach enables researchers to understand the context, competitive dynamics, and adaptive strategies of Gojek through the interpretation of rich and contextual secondary data (Creswell, 2026). Descriptive qualitative research is particularly relevant for examining competition and digital innovation phenomena because it allows an in-depth exploration of changes in the business environment, interactions among industry actors, and corporate strategies within platform ecosystems (Yin, 2018).

The research adopted a case study design. Yin (2018) explain that case studies are appropriate when researchers aim to understand contemporary phenomena within real-life contexts, particularly when the boundaries between the phenomenon and its context are unclear. Gojek was positioned as the primary "case" for analysis, particularly in relation to:

multi-sector competition (ride-hailing, food delivery, and logistics); disruption from Grab, Maxim, ShopeeFood, Lalamove, and Deliveree; market share shifts based on industry data from data.ai, Statista, and Momentum Works; and the strengths and weaknesses of platform ecosystems. Accordingly, the case study approach provided a comprehensive analytical framework for examining Gojek's dominance strategy within a dynamic and highly competitive digital business environment.

This study relied on secondary data obtained from various relevant and credible sources. The use of secondary data enabled longitudinal and comparative analysis of complex digital market dynamics (Saunders et al., 2019).

Data collection was conducted through two main methods. First, documentation studies were carried out by examining industry reports, financial reports, academic publications, and market share data. Documentation studies enabled the researchers to obtain an objective understanding of Gojek's market position and competitive threats. Second, literature studies were conducted on the major theoretical frameworks employed in this research, including competitive advantage (Porter, 1985); Disruptive innovation (Christensen, 1997); platform ecosystems and network effects (Jacobides et al., 2018; Parker et al., 2016); Market dominance strategy (Kotler & Keller, 2016).

The study employed thematic content analysis, as developed by Christou (2023) dan Braun & Clarke (2012). This analytical technique was considered appropriate for identifying patterns, categories, and strategic themes within secondary data related to Gojek's competition and business strategies. The analytical stages consisted of: data familiarization, involving an in-depth review of all documents and industry reports to understand the competitive context surrounding Gojek; initial coding, which identified relevant information such as market share, competitor strategies, Gojek's innovations, and service disruptions; and theme development, where major themes were constructed based on the theoretical framework, including Gojek's competitive advantage, disruptive innovation by competitors, platform ecosystem dynamics and network effects, and sustainable market dominance strategies.

The subsequent stage involved thematic analysis and interpretation, which connected empirical findings with theoretical perspectives to explain Gojek's dominance strategy. Finally, the findings were presented in descriptive and interpretative analytical narratives designed to address the research questions comprehensively. This analytical method enabled the researchers to systematically interpret Gojek's dominance strategy within an evolving and increasingly competitive digital landscape.

RESULT AND DISCUSSION

The analysis of secondary data derived from industry reports, academic publications, and strategic documents indicates that Gojek's market dominance within Indonesia's digital transportation industry has experienced significant competitive pressure and strategic shifts in line with market maturity. The emergence of competitors such as Grab, Maxim, and ShopeeFood has transformed the nature of competition from one primarily driven by price promotions and user acquisition into a competition centered on business model efficiency, service integration, and digital innovation to maintain market relevance (Jusmadi, 2023; Sukarmi et al. 2024).

During its early phase, Gojek's dominance was established through large-scale user expansion and aggressive price-promotion strategies, consistent with the early-stage market penetration approach of mobile-based services (Tampubolon, 2025). However, as competitive intensity increased, Gojek's relative market share in the ride-hailing and food delivery segments began to decline due to rivalry not only among similar platforms but also across sectors, reflecting the convergence of the digital industry (Sulistyani et al., 2024). The entry of professional logistics providers such as Lalamove and Deliveree, combined with the integration

of logistics and e-commerce within ShopeeFood, demonstrates that the boundaries of the digital transportation industry have become increasingly blurred, with competition now occurring among overlapping ecosystems (Hou et al., 2021;Abrahamsson et al., 2003).

This phenomenon is consistent with the theory of disruptive innovation, in which new entrants do not need to replicate the incumbent's entire business model in order to erode market dominance. Advantages within specific value segments such as lower prices, service specialization, or integration with alternative ecosystems are sufficient to reshape market dynamics (Christensen et al., 2015; Markides, 2006).

Nevertheless, Gojek continues to possess strategic advantages through the integration of its digital platform ecosystem. The combination of transportation, food delivery, logistics, and digital payment services within a single super-app creates added value in the form of convenience, efficiency, and cross-service complementarities that are difficult for competitors to replicate (Markides, 2006 ;Jacobides et al., 2018). Therefore, Gojek's dominance has not disappeared; rather, it has evolved from a dominance model based on scale and price promotions into one centered on ecosystem value, non-price differentiation, and complex platform orchestration as a response to an increasingly convergent and competitive business environment.

Table 1. Evolution of Gojek's Dominance in the Digital Transportation Industry

Stage	Main Characteristics	Dominance Characteristics	References
Stage 1: Early Dominance	Large-scale user expansion, aggressive price promotions, and massive subsidies to acquire users	Dominance based on scale and transaction volume	Santoso (2020); Bahasoan et al. (2024)
Stage 2: Environmental Pressure	Increasing rivalry, entry of cross-sector competitors, and digital industry convergence	Dominance begins to weaken; competition shifts from price toward efficiency and service integration	Mulyadi & Dewi (2021); Prasetyo & Sari (2022)
Stage 3: Strategic Transition	Market share erosion, repositioning of value propositions, and focus on non-price differentiation and service personalization	Dominance increasingly based on value creation and customer loyalty rather than scale alone	Rahman & Putri (2023); Wulandari & Nugraha (2023)
Stage 4: Ecosystem Leadership	Integration of transportation, logistics, and digital payment ecosystems; platform orchestration; strengthening of social and institutional legitimacy	Dominance based on ecosystem integration, network effects, and long-term legitimacy that is difficult to replicate	Jacobides et al. (2018); Christensen et al. (2015)

Table 1 illustrates the gradual shift in Gojek's dominance strategy within Indonesia's digital transportation industry. In Stage 1, Gojek relied on large-scale user acquisition and aggressive price promotions to dominate the market (Indratma, 2021; Sulistyani et al., 2024). Entering Stage 2, competitive intensity increased and the entry of cross-sector competitors began to pressure Gojek's dominance, shifting the strategic focus from scale expansion toward efficiency and service integration (Tapsell, 2014); Rahayu, 2017; Indrati et al., 2018).

In Stage 3, Gojek experienced market share erosion and repositioned its value proposition through non-price differentiation and service personalization, marking a transition from transaction volume–based dominance toward user loyalty and value creation (Indrati et al., 2018; Rahayu, 2017). Finally, in Stage 4, Gojek reinforced its new form of dominance through integrated ecosystem orchestration by combining transportation, logistics, and digital payment services while strengthening network effects and long-term social–institutional legitimacy, making its dominance increasingly difficult for competitors to replicate (Jacobides et al., 2018b; Christensen et al., 2015).

The transformation of Gojek's dominance demonstrates that the pressures on the company's competitive position are not coincidental, but rather the result of systemic changes in the external environment. The shift from scale-based dominance to ecosystem value–based dominance indicates that factors beyond the company's direct control such as regulation, economic dynamics, social behavior changes, technological developments, environmental issues, and legal aspects have become increasingly influential in shaping competition within the digital transportation industry. Therefore, to comprehensively understand both the pressures and strategic opportunities faced by Gojek, an external environmental analysis using the PESTEL framework is required. The following figure presents the results of Gojek's external environmental analysis using the PESTEL framework to identify political, economic, social, technological, environmental, and legal factors influencing the dynamics of the digital transportation industry.

Figure 1. Gojek's External Environmental Analysis Based on the PESTEL Framework

Table 2. Gojek PESTEL Analysis

Factor	Description of Impact on Gojek	Strategic Implications
Political	Online transportation regulations, upper and lower fare limits, inconsistency between central and regional policies	Encourages non-price differentiation strategies; limits price competition; requires regulatory adaptation
Economic	Consumer purchasing power, inflation, driver-partner income structure, growth of the digital economy	Increases user price sensitivity; strengthens opportunities for digital financial services and MSME integration
Sosial (Social)	Digital-oriented behavior, multi-homing among users and drivers	Reduces customer loyalty; encourages a stronger focus on user experience and long-term trust
Technological	AI, big data analytics, dispatch algorithms, technology standardization	Feature-based differentiation becomes increasingly limited; requires ecosystem-level systemic innovation
Environmental	Pressure for green mobility and electric vehicle adoption	Eco-innovation has the potential to become a source of long-term competitive advantage
Legal	Personal Data Protection Law, driver-partnership status, competition law	Increases compliance costs; requires balance between innovation and legal compliance; creates reputational risks

Political factors influence Gojek's strategic flexibility through online ride-hailing fare regulations that limit price competition and encourage non-price differentiation strategies. Government intervention can reshape the competitive structure of the industry (Porter, 2016) Economic factors, such as declining purchasing power and increasing price sensitivity, make consumers more likely to switch to lower-cost services such as Maxim and ShopeeFood. From a platform economy perspective, this condition is driven by the low switching cost of users (Parker, G. G. et al., 2016). Eisenmann, 2013 further emphasizes that socially, multi-homing

behavior reduces customer loyalty and weakens market dominance. From a technological perspective, the use of artificial intelligence and big data enhances operational efficiency; however, technological advantages tend to be temporary, making ecosystem-level innovation increasingly important (Jacobides et al., 2018b). Environmental factors indicate that eco-innovation has the potential to improve brand image and long-term customer loyalty (Iswanto et al., 2025). Meanwhile, legal factors including personal data protection, driver-partnership status, and competition law oversight require Gojek to balance innovation with regulatory compliance.

Based on the results of the external environmental analysis (PESTEL), it can be concluded that political, economic, social, technological, environmental, and legal changes have fundamentally reshaped the competitive structure of Indonesia's digital transportation industry. To further understand how these external factors influence Gojek's competitive position in a more operational manner, this study employs Porter's Five Forces framework. This framework enables a more specific analysis of competitive intensity and industry attractiveness through five major forces: the threat of new entrants, the threat of substitute products, the bargaining power of buyers, the bargaining power of suppliers, and rivalry among existing competitors (Porter, 2016). The following figure presents Porter's Five Forces analysis to illustrate the level of competitive intensity and structural pressures faced by Gojek within Indonesia's digital transportation industry.

Figure 2. Competitive Structure of Indonesia's Digital Transportation Industry Based on Porter's Five Forces

Indonesia's digital transportation industry is characterized by a very high level of competition. The threat of new entrants is significant because entry barriers are relatively low and core technologies are easily replicated, as explained by Porter (2008). The threat of substitutes is also high due to the emergence of ShopeeFood, Lalamove, and Deliveree, which intensify price competition and reduce profit margins (Porter, 1980).

The bargaining power of buyers and suppliers is strong because both users and driver-partners can easily switch between platforms through multi-homing behavior, resulting in low loyalty and increasing incentive costs (Eisenmann et al., 2011). In addition, rivalry among Gojek, Grab, Maxim, and other digital platforms has become increasingly intense under conditions of hypercompetition. Overall, the industry structure demonstrates low to moderate attractiveness, making price-promotion strategies increasingly difficult to sustain.

SWOT analysis is employed in this study as a strategic synthesis tool rather than merely an inventory of internal and external factors. SWOT integrates findings from the external environmental analysis (PESTEL) and the industry competitive structure (Porter's Five Forces) with Gojek's internal conditions as a digital transportation platform. Accordingly, SWOT functions as an analytical bridge toward the formulation of more operational and policy-oriented strategies through the TOWS framework. Within the context of a highly competitive

and convergent digital platform industry, SWOT enables a realistic identification of Gojek's strategic position, including both its relevant strengths and the structural limitations that must be managed (Gürel & Tat, 2017).

Gojek's primary strength lies in its integrated super-app ecosystem. The platform combines transportation services (GoRide and GoCar), food delivery (GoFood), logistics (GoSend and GoBox), and digital payment services (GoPay) within a single platform. This integration creates cross-service complementarities, in which the use of one service increases the likelihood of using other services.

Another major strength of Gojek is its ability to orchestrate an ecosystem consisting of users, driver-partners, merchants, and digital payment systems integrated within its super-app. According to Jacobides et al. (2018), the capability to manage platform ecosystems constitutes a source of competitive advantage that is difficult to imitate. Furthermore, Gojek's strong brand awareness as Indonesia's pioneer in online transportation, supported by the utilization of big data analytics and digital algorithms, enhances operational efficiency and service personalization.

However, Gojek also faces several structural weaknesses, particularly the high costs associated with subsidies, driver incentives, and promotional activities required to retain users amid intense competition. Low loyalty among users and driver-partners due to multi-homing behavior has made promotion-based lock-in strategies less effective. Eisenmann et al. (2011) emphasize that multi-homing represents a major obstacle to establishing stable platform market dominance. Moreover, ride-hailing and food delivery features have become increasingly easy to replicate, thereby weakening competitive differentiation.

In terms of opportunities, the continued growth of Indonesia's digital economy, the expansion of financial services through GoPay, and the emergence of green mobility trends provide new avenues for growth. Wulandari and Nugraha (2023) demonstrate that eco-innovation can improve brand image and customer loyalty. The utilization of user data also enables Gojek to shift from mass-promotion strategies toward more personalized and efficient value creation. Meanwhile, the primary threats originate from aggressive competition with Grab, Maxim, ShopeeFood, Lalamove, and Deliveree, as well as regulatory pressures, user price sensitivity, and low switching costs that increase the risk of market share erosion.

Table 3. Gojek Internal and External Factors (SWOT) Matrix

Internal/ External	Strengths	Weaknesses
Opportunities	- Integrated super-app ecosystem (transportation, food, logistics, and payment services)	- Internal transformation: digitalization and cost efficiency
	- Strong brand awareness and social legitimacy	- Optimization of user and partner loyalty through value-based strategies
	- Technological capabilities and data management (big data and service personalization)	- Utilization of data to reduce dependence on mass promotions
Threats	- Leveraging internal strengths to face intense competition	- Managing internal weaknesses amid external threats
	- Maintaining reputation and user trust	- Rationalization of operational and promotional costs
	- Managing legal and regulatory risks through internal capabilities	- Focusing on segments and regions with low risk

Based on the SWOT analysis, Gojek's strategic position can be understood as a platform with substantial ecosystem strengths operating within a highly pressured industry structure. Gojek's internal strengths have not been fully capable of neutralizing external pressures such as intense rivalry, cross-sector substitution, and strict regulatory constraints. Therefore, Gojek's dominance strategy can no longer rely primarily on scale expansion and price-

promotion approaches, but instead must focus on leveraging ecosystem strengths to capture opportunities while mitigating structural threats. This synthesis serves as the foundation for the subsequent formulation of TOWS strategies.

The synthesis of the PESTEL, Porter's Five Forces, and SWOT analyses demonstrates that the erosion of Gojek's dominance within Indonesia's digital transportation industry cannot be explained merely as an internal corporate failure. Rather, the phenomenon represents the result of systemic, multidimensional, and interconnected structural shifts within the industry environment, as reflected in the dynamics of Gojek's dominance evolution. From the PESTEL perspective, regulatory pressures (political and legal), increasing price sensitivity driven by economic conditions, and social behavioral changes in the form of multi-homing collectively have reduced the effectiveness of price-promotion and scale-expansion strategies. Although technological and environmental factors create new opportunities, the synthesis indicates that such opportunities cannot be utilized partially; instead, they require the company's capability to orchestrate an integrated cross-service ecosystem (Parker, G. G. et al., 2016); Jacobides et al., 2018b).

These findings are reinforced by Porter's Five Forces analysis, which indicates that Indonesia's digital transportation industry is characterized by low entry barriers, high cross-sector substitution threats, dominant bargaining power of buyers and suppliers, and extremely intense rivalry. Within such an industry structure, competitive advantages based on user scale and price subsidies become temporary and easily eroded, making them insufficient to sustain long-term dominance (Porter, 2016).

Furthermore, the SWOT analysis reveals Gojek's strategic paradox. On one hand, Gojek possesses significant strengths, including an integrated super-app ecosystem, technological and data-management capabilities, and social legitimacy as Indonesia's pioneer in digital transportation. On the other hand, the company faces structural weaknesses such as high operational costs, low user and partner loyalty caused by multi-homing behavior, and the narrowing differentiation of core services. This synthesis confirms that Gojek's internal strengths do not automatically translate into structural protection against external industry pressures.

The analytical novelty of this study does not lie in the individual use of the PESTEL, Porter's Five Forces, or SWOT frameworks, but rather in the cross-framework synthesis approach used to explain the transformation of dominance within the digital platform industry. Unlike conventional literature that primarily measures dominance through market share, transaction volume, or user scale, this study argues that Gojek's dominance has not disappeared, but instead evolved.

Conceptually, this study demonstrates the transformation of Gojek's dominance from a market capture strategy toward an ecosystem leadership strategy, in which sustainable dominance is determined by the company's ability to simultaneously manage ecosystem value, network effects, and social–institutional legitimacy (Christensen et al., 2015; Jacobides et al., 2018b). Thus, the erosion of relative market share does not necessarily indicate strategic decline, but rather reflects the repositioning of dominance toward a more complex and difficult-to-replicate ecosystem level.

The theoretical contribution of this study lies in extending the concept of competitive advantage within the digital transportation industry by positioning social–institutional legitimacy and ecosystem orchestration as primary strategic factors. Empirically, this research explains how digital platforms in developing countries respond to hypercompetition and industry convergence pressures. The results of the PESTEL, Porter's Five Forces, and SWOT analyses are subsequently translated into more operational TOWS strategies.

Table 4. TOWS Matrix as Gojek's Strategy Formulation

Internal / External	Strengths (S)	Weaknesses (W)
Opportunities (O)	SO Strategy (Aggressive–Expansive)	WO Strategy (Turnaround–Adaptive)
	• Leveraging the super-app ecosystem to expand digital financial services and MSMEs.	• Reducing dependence on price promotions by shifting the focus toward value-based services.
	• Integrating GoPay as a cross-service loyalty hub to increase non-price switching costs.	• Utilizing digitalization and automation to reduce operational costs in logistics and transportation.
	.• Developing data-driven service personalization to enhance user experience and ecosystem value.	• Developing experience-based loyalty programs to address low user loyalty.
Threats (T)	ST Strategy (Defensive–Differentiative)	WT Strategy (Defensive–Survival)
	• Utilizing ecosystem strengths to face aggressive price competition from Maxim and ShopeeFood.	• Controlling subsidies and promotions to maintain financial sustainability.
	• Developing non-price differentiation (security, reliability, and service integration) to prevent market share erosion.	• Reducing regulatory and legal risks through stronger data governance and driver partnerships.
	• Leveraging reputation and regulatory legitimacy to address policy uncertainty.	• Focusing on market segments and regions with more stable profitability.

The SO strategy emphasizes leveraging the strengths of the super-app ecosystem, service integration, and GoPay to create cross-service value and sustainable non-price switching costs (Jacobides et al., 2018b). The WO strategy focuses on reducing internal weaknesses through digitalization, data analytics, operational efficiency, and value-based loyalty development in order to reduce dependence on price promotions. The ST strategy utilizes brand strength, ecosystem integration, and service quality to address aggressive competition and cross-sector substitution threats, consistent with Porter's (2008) view of differentiation as an effective defensive strategy. Meanwhile, the WT strategy adopts a defensive orientation through subsidy control, improved legal compliance, and concentration on more stable market segments to maintain operational sustainability under conditions of high competitive pressure.

Overall, the four SWOT quadrants indicate that Gojek's dominance is not static, but adaptive to both external and internal environmental dynamics. The SO and ST strategies represent the long-term direction of ecosystem-based dominance and value differentiation, whereas the WO and WT strategies function as mechanisms for adjustment and risk mitigation. This synthesis provides a strong conceptual foundation for translating TOWS strategies into more operational forms in the subsequent section.

The results of the TOWS analysis indicate that the challenges and opportunities faced by Gojek cannot be addressed simultaneously, but instead require sequential and adaptive strategic stages over time. Therefore, the strategies are translated into short-, medium-, and long-term roadmaps by considering the urgency of competitive pressures, the organization's internal readiness, and the horizon of strategic impacts. This roadmap is designed to ensure that the transformation of Gojek's dominance occurs gradually, realistically, and sustainably.

Table 5. Gojek Dominance Strategy Roadmap

Time Horizon	Main Strategic Focus	Derived TOWS Strategy	Implementation Direction
Short Term (0–2 years)	Market position stabilization and internal efficiency	WT & ST	Risk mitigation, cost control, and non-price differentiation

Medium Term (2–5 years)	Ecosystem strengthening and user loyalt	WO & SO	Internal transformation and value-based lock-in
Long Term (≥5 years)	Orchestration-based and sustainable dominance	SO (advanced stage)	Sustainable ecosystem development and platform leadership

Short-Term Strategy: Stabilization and Risk Mitigation (WT–ST)

Gojek's short-term strategy is primarily focused on preventing further erosion of market share and profitability caused by intense competition and increasing regulatory pressures. At this stage, the company's main priority is not aggressive expansion, but rather maintaining operational stability, market legitimacy, and business sustainability. The strategy adopts a defensive-adaptive orientation in response to high operational costs, low user loyalty, price wars, and the growing threat of service substitution.

Gojek needs to reduce its dependence on unsustainable subsidies and mass promotions by redirecting promotional efforts toward priority segments and value creation. Non-price differentiation also becomes increasingly important through improvements in service quality, safety, system accuracy, and overall user experience in order to reduce sensitivity to short-term incentives. In addition, strengthening compliance with the Personal Data Protection Law (UU PDP), improving algorithm transparency, and enhancing partnership governance should become strategic priorities, as legal legitimacy and institutional reputation possess significant long-term value. Adjustments to driver-partner incentive schemes are also necessary to ensure fairness and sustainability while maintaining driver loyalty without excessively increasing operational costs.

Medium-Term Strategy: Ecosystem Strengthening and Value-Based Lock-In (WO–SO)

Gojek's medium-term strategy is directed toward strengthening structural loyalty among users and partners through deeper ecosystem integration. The integration of GoRide, GoCar, GoFood, GoSend, and GoPay should function not merely as the coexistence of services within a single application, but as a seamless and integrated user experience capable of increasing non-financial switching costs. Within this stage, GoPay is positioned as the central pillar of the ecosystem through cross-service loyalty programs, integrated financial services, and activity-based incentives.

Furthermore, promotional strategies shift from mass-market approaches toward data-driven personalization in order to improve efficiency and relevance. Route optimization, operational automation, and the utilization of real-time data also become critical strategies for gradually reducing transaction costs and improving profitability margins.

Meanwhile, the long-term strategy aims to establish sustainable and difficult-to-replicate market dominance. Within the SO (Strengths–Opportunities) framework, Gojek leverages the strengths of its super-app ecosystem, service integration, and data-driven innovation to capture opportunities arising from digital economic growth. The strategic focus is no longer limited to expanding market share, but rather on building competitive advantage through ecosystem orchestration and cross-service value creation capable of maintaining long-term relevance amid digital industry convergence.

Key Strategic Directions

Gojek is transforming from a service provider into a platform orchestrator that manages the architecture of value within the digital ecosystem. The development of electric vehicles, green logistics, microfinance services, MSME financing, and smart mobility expands Gojek's role as a digital economic infrastructure while simultaneously strengthening its long-term legitimacy. Moreover, Gojek's position as a strategic government partner in urban

transportation and the digital economy enhances institutional legitimacy that is difficult for competitors to replicate.

At this stage, Gojek's success is no longer measured solely by market share, but also by the degree of user and partner engagement, the strength of network effects, and the sustainability of its social and institutional legitimacy. Overall, Gojek's strategic roadmap illustrates a gradual evolution: short-term strategies focus on operational stabilization, medium-term strategies emphasize value-based lock-in creation, and long-term strategies aim at ecosystem orchestration leadership. Consequently, Gojek's dominance strategy shifts from a market capture strategy toward an ecosystem leadership strategy, in which sustainable dominance is determined by the company's ability to simultaneously manage value creation, network effects, and institutional legitimacy.

CONCLUSION

This study concludes that the erosion of Gojek's dominance in Indonesia's digital transportation industry does not merely reflect an internal strategic failure, but rather represents the consequence of systemic and hypercompetitive structural changes within the industry environment. The company's early dominance, which was built upon large user scale and aggressive price promotions, has become increasingly unsustainable due to low switching costs, multi-homing behavior, cross-sector convergence, as well as regulatory and economic pressures. The PESTEL and Porter's Five Forces analyses demonstrate that the industry structure is characterized by low entry barriers, high substitution threats, and strong bargaining power of both buyers and suppliers, causing competitive advantages based on pricing and transaction volume to become temporary and easily eroded. Nevertheless, through the synthesis of SWOT and TOWS analyses, this study argues that Gojek's dominance has not disappeared, but rather evolved from a market capture strategy toward ecosystem leadership. Gojek's primary strengths lie in its super-app ecosystem, cross-service orchestration capabilities, and socio-institutional legitimacy, which, when managed strategically, can become sources of long-term competitive advantage. Therefore, the sustainability of Gojek's future dominance will no longer be determined solely by market share, but by its ability to maintain value relevance, ecosystem engagement, and institutional legitimacy through adaptive, value-oriented, and sustainable strategies.

Based on the findings, three major strategic recommendations are proposed. First, Gojek should reduce its dependence on short-term promotions and subsidies by focusing on non-price differentiation through service quality, user experience, and ecosystem integration. Strengthening GoPay and implementing green mobility strategies are also essential to enhance user loyalty and long-term competitive advantage. Second, regulators should establish adaptive and consistent digital transportation regulations capable of balancing consumer protection, driver-partner welfare, and platform innovation opportunities. Third, future research is recommended to employ quantitative primary data, advanced analytical approaches, and cross-country studies among developing economies to strengthen the generalizability of the findings. Overall, the sustainability of Gojek's dominance will depend on its capability to manage ecosystem value and institutional legitimacy within an increasingly hypercompetitive environment.

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