Multi-Stakeholder Governance Strategies in Indonesia's Ride-Hailing Ecosystem

Yuwono D. Sucipto[1], Euis Saribanon[2], Irwan Chairudin[3], Osman Arofat[4], Reni Dian Oktaviani[5]
[1]Institut Transportasi dan Logistik Trisakti, Jakarta, Indonesia, yuwonod@gmail.com
[2]Institut Transportasi dan Logistik Trisakti, Jakarta, Indonesia, nengnonon04@gmail.com
[3]Institut Transportasi dan Logistik Trisakti, Jakarta, Indonesia, irwan.chairuddin@gmail.com
[4]Institut Transportasi dan Logistik Trisakti, Jakarta, Indonesia, arofat2001@hotmail.com
[5]Institut Transportasi dan Logistik Trisakti, Jakarta, Indonesia, reni@itltrisakti.ac.id

Corresponding Author: yuwonod@gmail.com[1]

Abstract: The transformation of Ride-Hailing Services (RHS) into Transport Super-Apps (TSA) in Indonesia has fundamentally altered the urban mobility landscape. This article addresses the need to delineate a multi-stakeholder governance framework that aligns innovation with environmental sustainability, accessibility, and user convenience. Adopting a Systematic Literature Review (SLR) approach of current literature through 2025-2026, the primary findings indicate that the success of sustainable mobility depends on resolving the 'Mobility Trilemma': affordability, scalability, and sustainability. The analysis emphasizes three main pillars: (1) trust-based regulation, (2) acceleration of Electric Vehicle (EV) infrastructure, and (3) multimodal integration as the foundation for future RHS policy design in Indonesia. This study formulates a multi-stakeholder governance framework focusing on the roles of users, drivers, TSA platforms, and the government (central and regional), alongside cross-level policy recommendations to promote RHS as a feeder for mass public transportation.

Keywords: ride-hailing, transport super-apps, MaaS, trust-based regulation, electric vehicles (EV)

INTRODUCTION

The widespread use of motorcycles in Indonesia has become a hallmark of urban mobility. However, high rates of motorcycle ownership carry negative impacts concerning tailpipe emissions, traffic congestion, and road infrastructure performance. Motorcycle-based Ride-Hailing Services (RHS) have served as a primary substitute in cities with limited public transportation facilities, particularly among university students who value service and convenience. With advancements in Information and Communication Technology (ICT), RHS has evolved into Transport Super-Apps (TSA) that integrate mobility, logistics, and e-

commerce. This transformation offers significant opportunities for travel demand management and the integration of public services, yet it also necessitates inclusive policies to protect the rights of all ecosystem actors. This research emphasizes the need for a multi-stakeholder governance framework that balances the interests of users, drivers, platforms, and the government, while simultaneously addressing risks related to data privacy, congestion, and environmental impact.

This study presents a conceptual framework based on a Systematic Literature Review (SLR) of data from 2025–2026, highlighting trust-based regulation, Electric Vehicle (EV) acceleration, and cross-level integration as the foundation for the future of RHS in Indonesia. (Rizki et al., 2023; Smith & Dickinson, 2024; Tambunan et al., 2023).

Summary of core findings includes:

1. The Mobility Trilemma (affordability, scalability, sustainability) serves as the primary analytical framework for sustainable RHS design. (Zudhy et al., 2020, 2023).
2. Trust-based regulation enhances accountability, price transparency, data protection, and user trust in RHS algorithms. (Mogaji, 2022; Suwignjo et al., 2023)
3. EV infrastructure acceleration (specifically electric motorcycles and charging/battery swapping infrastructure) is a core strategy to reduce emissions and improve the economic viability of EV-based RHS. (Waluyo & Irawan, 2022).
4. Multimodal integration defines the role of RHS within mass public transport systems through feeder models and modal transfer synchronization. (Krivulin, 2024).

METHOD
Research Design

This study utilizes a descriptive qualitative approach through a Systematic Literature Review (SLR). The actor framework identifies Users, Drivers, TSA Platforms, and Government (Central & Regional), alongside supporting actors from the Electric Vehicle (EV) infrastructure sector and the academic community. Data sources are derived from the Scopus database for the 2025-2026 period, emphasizing online transportation dynamics within both the Indonesian and global contexts. The analytical technique employed is thematic analysis, used to identify recurring themes such as convenience, trust, emissions, and accessibility. Finally, the synthesis and validation of the conceptual framework were conducted using international literature concerning socio-technical transitions and platform governance. (Kwilinski & Lyulyov, 2023; Shalihati et al., 2022; Turner, 2023).

SLR Procedures
The Systematic Literature Review (SLR) followed these specific steps:

1. Identification and selection of studies relevant to RHS, TSA, and MaaS within both the Indonesian and global contexts.
2. Thematic coding of key concepts, specifically: trust-based regulation, EV infrastructure, multimodal integration, and governance frameworks.
3. Mapping of primary actors and their inter-actor relationships, categorized as Actor-Authorization-Regulation-Implementation.
4. Cross-validation of findings through triangulation with international literature concerning socio-technical transitions and platform governance. (Drivers, 2021; Rizki et al., 2021)

RESULTS AND DISCUSSION
User Behavior and Technology Trust

Trust has emerged as the primary driver for RHS adoption. Users identify data security, price fairness, and algorithmic transparency as key determinants of loyalty. In Banda Aceh, the frequency of RHS usage increases when high levels of service perception and

convenience are achieved. Self-efficacy is also vital for mitigating technology anxiety; this underscores the need for public education interventions by regulators to enhance digital literacy and the understanding of price regulation mechanisms and data privacy. (Hamdani et al., 2023; Waluyo & Irawan, 2022). The role of trust as a moderator is also reflected in the literature concerning the influence of security risk externalities on RHS usage intentions, particularly within the context of digital payments and user data protection. (Pandemic et al., 2021; Yin et al., 2022). Generally, the literature demonstrates that trust plays a pivotal role in mitigating perceptual risks and driving the usage of complex platforms, encompassing key dimensions such as transparency, price fairness, and data accountability. (Munawar et al., 2022; Truong & Tay, 2020).

Energy Transition: Challenges of Electric Vehicles (EV)

The implementation of Electric Motorcycle-Based Ride-Hailing (e-MBRH) in cities such as Yogyakarta reveals that EV adoption is significantly influenced by trip classification and usage duration. The primary obstacles identified include battery reliability and the limitations of charging infrastructure.

Studies conducted in China highlight the emergence of the SAF Trilemma, balancing affordability, scalability, and sustainability, which is highly relevant to Indonesia's transportation energy transition policies. Furthermore, challenges related to infrastructure access, costs, and performance perceptions continue to impact the rate of EV adoption within the RHS ecosystem. (Adenigbo & Luke, 2023; Earl & Earl, 2023). The literature also indicates that battery swapping and charging networks integrated with the national power grid are essential for ensuring the daily operations of RHS drivers, as well as fiscal policies that facilitate the transition to EVs through purchase/rental incentives and support for battery swapping infrastructure. (Loa et al., 2025; Nguyen-phuoc et al., 2022; Yadav et al., 2024). Several studies focus on the economic benefits for drivers and the potential for energy savings; however, barriers concerning battery reliability and swapping duration remain primary constraints in Indonesia. (Garside et al., 2023; Sugiyanto et al., 2023).

Emission Management and Conflict of Interest

Demand management strategies, such as the combination of electronic road pricing and modal shifts toward public transportation, have proven effective in reducing urban air pollution. However, the conflict of interest between the income requirements of drivers/platforms and government environmental targets necessitates cross-sectoral incentives that encourage investment in sustainable logistics technology in megacities. Platforms must be encouraged to adopt sustainable logistics technologies, including route optimization, battery capacity management, and energy efficiency practices, to mitigate emissions arising from the growth of TSAs. (Gawande et al., 2024). "Policy synchronization across regimes (central-regional) through the Multi-Level Perspective (MLP) framework and trust-based governance will maximize environmental benefits while maintaining the agility of digital innovation. (Dief-allah et al., 2024; Gender & Matter, n.d.)

CONCLUSION

The governance of online transportation in Indonesia must transition from purely operational regulations toward a sustainable ecosystem. Resolving the Mobility Trilemma requires a governance approach that simultaneously integrates technical, social, and environmental dimensions.

Trust-based regulation, the acceleration of EV infrastructure, and multimodal integration represent the fundamental pillars for repositioning RHS as a feeder for mass public transit. This strategic shift aligns with global scholarly discourse regarding MaaS,

TSA, and platform transitions in developing nations. (Cient, 2022; Shang et al., 2021; Zia & Alzahrani, 2022).

Strategic Recommendation

1. Trust-Based Regulation: The government must mandate enhanced algorithmic transparency, user data protection, and cybersecurity standards for RHS platforms. Implementing accountability frameworks and independent audits of pricing algorithms and data privacy policies should be harmonized at both national and regional levels. Trust-based regulatory mechanisms are considered highly effective within the RHS and TSA context. (Goh et al., 2022; Loa et al., 2024; Sugiyanto et al., 2021)

2. EV Infrastructure Acceleration: The development of charging networks and battery swapping systems integrated with the national power grid is essential to ensure energy availability for RHS EVs. Key drivers include EV purchase/rental incentives for drivers, tax incentives for battery swapping infrastructure, and policy synchronization between central and regional governments. (Alzahrani et al., n.d.; Journal & Dec, 2024; Waluyo & Irawan, 2022).

3. Multimodal Integration: RHS should be strategically designed as a feeder for mass public transit through synchronized transfers, MaaS packages, and attractive pricing schemes for the younger demographic. Cross-regime policies are necessary to reduce policy fragmentation and enhance ecosystem cohesion. The Multi-Level Perspective (MLP) can serve as an analytical framework for evaluating these cross-level policies. (Bouteraa et al., 2027; Dong et al., 2022).

4. Multi-Stakeholder Governance Framework: Primary actors, including users, drivers, platforms, and the government must be integrated into collaborative forums that balance the rights and obligations of all stakeholders. Policy focus should remain on worker rights, data protection, ride safety, and accessibility for all social strata. Platform governance utilizing regulatory sandbox mechanisms can mitigate innovation risks while maintaining public protection. (Ahmed, 2022; Pourhashem, 2020).

Further discussion suggests that because literature shows variations between developing and developed nations regarding MaaS and EV adoption, policies must be contextually adapted. Stakeholders should leverage theoretical models such as UTAUT/TPB to understand adoption intentions, alongside systemic approaches like System Dynamics to simulate policy impacts on emissions, network performance, and infrastructure load. (Amankwaa & Gough, 2023; Mont et al., 2020; Wang et al., 2022).

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