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The Super App War: Why Ecosystem Orchestration Matters More Than Scale in the Competition Between Grab and GoTo

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INTRODUCTION

The digital economy has changed the basis of competition. Firms increasingly compete not as isolated companies but as orchestrators of interdependent networks made up of consumers, merchants, drivers, financial institutions, and technology partners (Jacobides, Cennamo, & Gawer, 2018). This shift is nowhere more visible than in Southeast Asia's super app market, where Grab Holdings and GoTo Group compete across transportation, food delivery, digital payments, financial services, and logistics. Both companies inherited their current ecosystems through consolidation rather than organic growth alone: Grab absorbed Uber's Southeast Asian ride-hailing and food delivery operations in 2018 (Grab, 2018), while GoTo was formed in 2021 through the merger of ride-hailing pioneer Gojek and e-commerce marketplace Tokopedia (CNBC, 2021). This commentary argues that these two histories produced two structurally different ecosystems, and that the rivalry between them is best explained not by which company is larger, but by which company governs and orchestrates its network more effectively.

Scale explains why Grab and GoTo can compete at all; it does not explain which one is better positioned to remain ahead. A critical mass of users, drivers, and merchants is a necessary condition for any super app, since transaction density is what makes GrabFood, GoFood, GrabPay, and GoPay useful in the first place. But scale is not a sufficient condition for durability, because size can be matched by a well-funded rival, discounted away, or constrained by regulators. What distinguishes a durable ecosystem leader from a merely large one is orchestration: the continuous work of setting commission structures, algorithmic

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visibility rules, dispute-resolution processes, and incentive programs that keep every side of the platform willing to stay.

TWO ARCHITECTS, TWO STRATEGIES

Grab and GoTo did not arrive at their current ecosystem structures the same way, and this difference in origin is also a difference in orchestration philosophy. Grab expanded largely through acquisition: taking over Uber's regional ride-hailing and food-delivery business in 2018 consolidated the mobility and delivery layer under a single Grab-controlled technology stack across eight countries (Grab, 2018). This gave Grab a comparatively unified architecture in which mobility, delivery, and GrabPay financial services are coordinated from one operating core, which makes it easier for the company to standardize commission rules, driver incentives, and merchant terms across markets.

GoTo was built differently, by combining two companies with distinct participant bases. Gojek brought a high-frequency, lower-value transport and delivery business, while Tokopedia brought a high-value, lower-frequency e-commerce marketplace (CNBC, 2021). Rather than extending a single stack, GoTo has had to orchestrate the integration of drivers and merchants on one side and online sellers and buyers on the other, under a shared payments layer, GoPay. This structure gives GoTo a wider footprint across commerce and mobility, but it also makes its orchestration task arguably harder, since it must align incentives across two historically separate ecosystems rather than extend one.

The comparative implication is that Grab's advantage has tended to come from orchestration efficiency: tighter, more centralized governance over a unified stack. GoTo's advantage has tended to come from orchestration breadth: a wider participant base spanning mobility and e-commerce under one payments layer. Neither company's user count nor gross transaction value has been the deciding factor in its market position; both have led and trailed the other in specific verticals despite comparable scale. What has consistently separated them is how well each manages the terms of engagement offered to its participants.

SCALE IS NECESSARY, ORCHESTRATION IS SUFFICIENT

This distinction can be stated more precisely. Scale is necessary because network effects require participants on all sides before value can be created (Parker, Van Alstyne, & Choudary, 2016); a super app with few drivers and few merchants is not a super app at all. But orchestration is what is sufficient for sustainability, because it determines whether the participants that scale attracted actually stay. A platform can reach enormous scale and still lose ground if it governs its network poorly, just as a comparatively smaller platform can hold its position by managing trust, fairness, and coordination better than a larger rival. Put differently, Grab and GoTo are no longer competing merely as transportation or e-commerce companies; they are competing as ecosystem architects, and the architect that designs better rules for its participants, not the one with the largest user base, is the one more likely to keep them.

This reframing also points toward where the competition is likely headed. The platform that wins the next phase of the super app war may not be the one with the most users, but the one that creates the strongest complementarities among users, merchants, financial institutions, and service providers, so that each additional participant makes every other participant's experience better, not just larger. Scale can be purchased with subsidies; complementarity has to be designed and maintained.

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GOVERNANCE IN PRACTICE: COMMISSIONS, ALGORITHMS, AND TRUST

Because platform owners set the terms of engagement, including commission rates, algorithmic order and ride allocation, surge pricing, and the visibility merchants receive in-app, governance failures translate directly into participant exit. Drivers who find pay structures unpredictable, merchants who view commission tiers as excessive, and consumers who experience inconsistent service quality all have low-cost alternatives one app download away. Surge pricing is a clear example of this tension: it is designed to balance supply and demand in real time, but when its logic is not visible to the people paying it, it becomes a source of distrust rather than a coordination tool. Commission structures raise a similar dilemma, since the platform needs commission revenue to fund matching, payments infrastructure, and support, but a commission set too high pushes merchants to raise prices, discourages repeat listings, or drives them toward a competing app.

Dispute resolution is the least visible but arguably most consequential governance mechanism, because it is where individual participants experience the platform's fairness directly, whether a wrongly cancelled ride, a disputed delivery, or a suspended merchant account is resolved quickly and transparently. This is also where platform trust connects to participant behavior more broadly: trust mediates whether users continue transacting on a platform even when better prices exist elsewhere, a pattern documented in adjacent digital services such as online travel booking, where perceived service quality and ease of use influence purchase intention primarily through the trust that consumers place in the platform (Putra & Pangaribuan, 2025). A credible governance model therefore has to protect the interests of drivers, merchants, and consumers simultaneously, since favoring any one side for short-term revenue tends to erode the participation that the platform depends on from the others.

THE END OF EASY GROWTH: FROM SUBSIDIES TO DISCIPLINE

The super app market is also a textbook case of the chicken-and-egg problem common to multi-sided platforms: consumers hesitate to join a platform with few merchants and drivers, while merchants and drivers hesitate to join a platform with few consumers (Parker, Van Alstyne, & Choudary, 2016). Grab and GoTo both solved this problem in their growth years through heavy discounting, free delivery promotions, and cash incentives for drivers and merchants, spending that helped both companies cross the tipping point at which network effects could sustain further growth.

What that growth cost, however, is now unavoidable. After peak losses, Grab narrowed its losses from more than $1.7 billion in 2022 to $158 million in 2024 before reporting its first full-year net profit in 2025, achieved through tighter cost control and a pullback in consumer incentives even as transaction volumes kept rising (The Diplomat, 2026). GoTo followed a similar path, with incentive and pricing changes, alongside a larger role for its financial-services division, narrowing its nine-month loss from roughly $269 million in 2024 to about $60 million in 2025 (The Diplomat, 2025). These are not the results of a chicken-and-egg problem that quietly resolved itself; they are the results of years of deliberate, investor-driven cost discipline layered on top of the ecosystems both companies had already built. Framing the post-tipping-point phase as growth sustained "without much effort" would misread what actually happened: both companies are still actively managing the trade-off between subsidized growth and profitability, and neither has fully escaped the pressure to keep proving that its ecosystem can generate cash on its own.

This macroeconomic reality reinforces rather than undermines the orchestration argument. When discounts are no longer available to paper over governance failures, the quality of a platform's rules for its

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participants becomes the primary lever left for retaining them. A platform that leans on subsidies risks training its participants to respond to payouts rather than to the platform itself, a pattern that can leave both loyalty and unit economics fragile once the incentives are withdrawn (The Diplomat, 2026). It is telling that as subsidies have receded, complementary strategies aimed at deepening engagement, such as short-form video and livestream commerce that draw on the credibility of individual sellers and streamers to sustain purchase intent among digitally native consumers, have become a more visible part of platform ecosystems in the region (Hamidah, Pangaribuan, & Luhur, 2024). Discipline, not discounting, is becoming the arena in which orchestration is now tested.

STRATEGIC IMPLICATIONS FOR PLATFORM LEADERS

Several implications follow. First, platform managers should treat ecosystem health as the primary objective rather than chasing short-term revenue from any single participant group, since revenue extracted at the expense of driver or merchant trust tends to be self-limiting. Second, the capability to govern effectively, more than the capability to grow quickly, is what separates ecosystem leaders from the rest, because governance shapes trust, participation, and long-term sustainability. Third, durable advantage comes from coordinating and orchestrating partners rather than internalizing every function of the value chain; neither Grab nor GoTo owns the restaurants, stores, or vehicles that generate most of their transaction volume, and that is by design, not by omission. Finally, both companies now operate in an environment where investors expect discipline as much as growth, which means the ecosystems that will lead the next phase of competition are the ones that can demonstrate they no longer need subsidies to hold their participants in place.

CONCLUSION

The competition between Grab and GoTo illustrates the growing role of ecosystem strategy in digital business, but it also shows that scale and orchestration are not interchangeable explanations for success. Scale got both companies through the chicken-and-egg problem; orchestration, and now cost discipline, is what will determine which one keeps its participants once subsidies are gone. The more provocative implication is this: the real super app war was never about who could give away the most free rides or the deepest delivery discounts. It is about which company can make its governance, not its generosity, the reason drivers, merchants, and consumers choose to stay. On that measure, the winner will not be the platform that scaled the fastest, but the one that learned to govern itself before its investors forced it to.

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