



RESEARCH PAPER

May 2025



Exploring Grab's Operations in Southeast Asia: Cases of Indonesia, the Philippines, Singapore, and Thailand

I. An overview of the Digital Platform landscape

The Gig Economy and Digital Platform

The gig economy refers to a market system based on work arrangements that are usually short-term, task-based contracts as opposed to regular employment. Workers in the gig economy are referred to as freelancers, independent contractors, or independent partners by the companies that hire them. As a matter of fact, gig work and gig workers have been in existence since the early 1900s. But the rapid growth of the gig economy is mainly owed to advancements in internet technology, which served as an impetus for digital platform companies to expand to unprecedented scales and take advantage of potential labor markets. Workers are enticed with promises of flexible working hours and take-home pays beyond minimum wages, which are not necessarily ensured in traditional employment. But the reality of workers in the gig economy, especially

those in the digital platform industry, shows highly exploitative and extremely precarious work arrangements. Under capitalism, workers are forced into gig work because of the unavailability of regular (waged) employment (De Ruyter & Rachmawati, 2020).

On a global scale, digital platform transactions have been growing rapidly and steadily over the past 20 years, with the World Economic Forum (2015) estimating the growth to be 15-20% a year in emerging markets.

In Southeast Asia, digital platform giant Grab offers a wide range of services ranging from ride-hailing, courier delivery, mobile wallets for cashless transactions, to advertising and financial services, in what seems to be a virtual monopoly of digital platform-based activities. This broad set of services has placed Grab at the top in terms of market share in the region. Grab categorizes these services under Deliveries, Mobility, Financial Services, and Enterprise and New Initiatives.

Grab Corp.

First launched in 2012 as MyTeksi, the company was rebranded to GrabTaxi in 2013 as part of the incorporation of Singaporean private limited company GrabTaxi Holdings. The company has since expanded its operations to eight (8) countries in Southeast Asia: Malaysia, Singapore, the Philippines, Indonesia, Thailand, Vietnam, Cambodia, and Myanmar. MyTeksi was originally founded to make taxi rides safer, as users could book taxis and see the profiles of their drivers through their smart devices (Digital News Asia, 2014). By 2014, it had introduced GrabCar to Malaysia and Singapore as a ride-hailing service that provided access to non-taxi vehicles similar to Uber (Channel News Asia, 2014). Not long after, it added GrabBike to its list of services, operating in Vietnam and Indonesia, where motorcycles and scooters are common modes of transportation. In the same year, the company secured a USD 250 million deal with Japanese telecommunications giant Softbank, which challenged Uber's dominance in the region (Russel, 2014)

In April 2015, Grab conducted a holding company reorganization and incorporated Grab Inc., a Cayman Islands limited liability company, as the ultimate corporate parent of the group.

In August 2015, Grab secured one of its largest investments, then, from China's sovereign wealth fund, China Investment Corp, and China's largest on-demand transport app, Didi Kuaidi. The investment amounted to USD 350 million (Lee, 2015).

GrabTaxi was again rebranded simply as Grab in January 2016 and was followed by additional app features including GrabChat, GrabRewards, and GrabShare (Lee, 2016). In the same year, Grab announced its expansion into financial services by launching GrabPay Credits. Grab acquired Indonesian online payment startup Kudo the following year. This served as the official entrypoint to GrabPay as a digital payment service, which allowed users to make purchases from third-party merchants outside of ride-hailing.

In March 2018, Grab and Uber's Southeast Asian operations entered a merger that allowed Grab to acquire Uber's assets, including UberEats. This led to Grab's expansion to food delivery services. GrabFood, along with GrabExpress, the company's courier service, which was launched in the same year, has since contributed the lion's share of

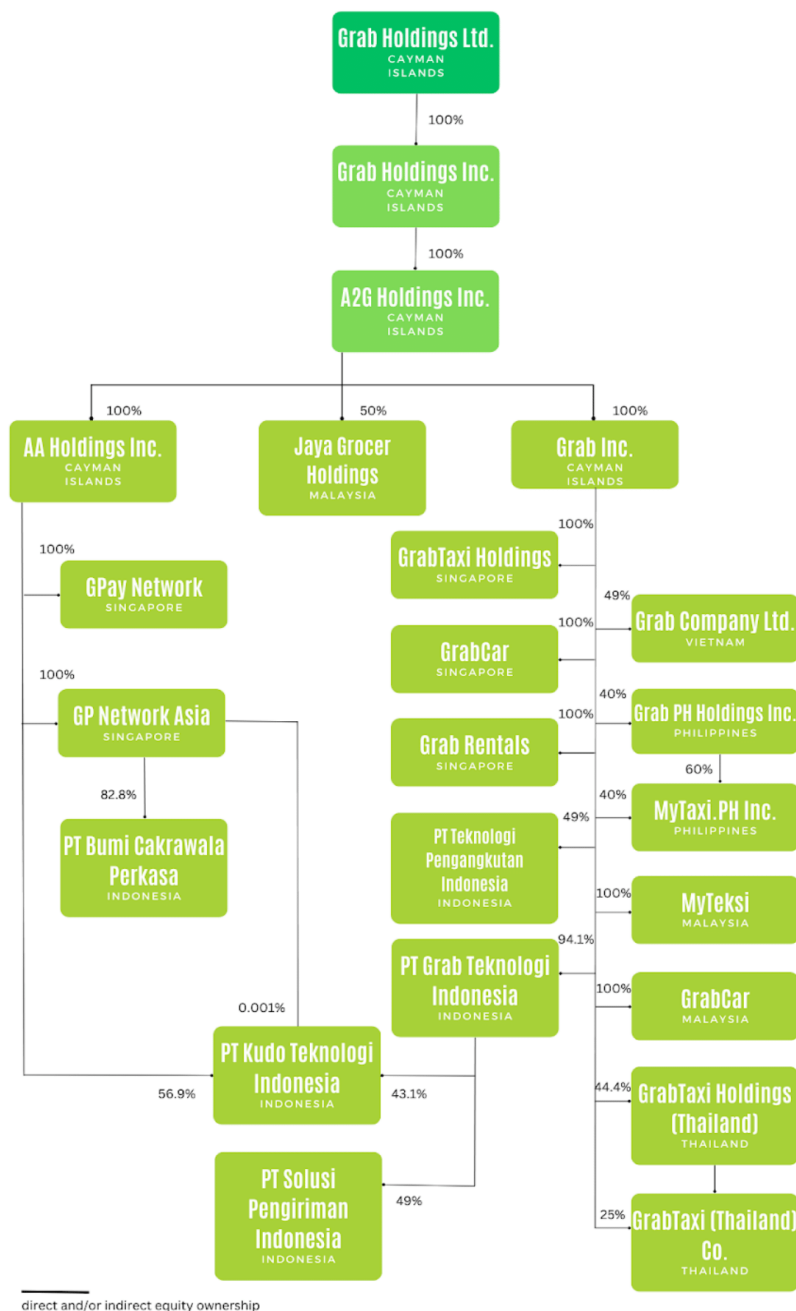
revenue for the company. The same year also saw Uber's exit in the Southeast Asian market when Grab acquired its operations. Grab was able to gain control over the ride-hailing market in the region while Uber settled for a 27.5% stake in Grab. Grab Inc. completed another holding company reorganization in which Grab Holdings Inc. (GHI) became the ultimate corporate parent of the group (Keeton-Olsen, 2018)

Grab's revenue in 2020 was at USD 469 million. By 2021, in the middle of a pandemic that ravaged businesses all over the world, Grab reported a 29% year-over-year (YoY) growth in gross merchandise value (GMV) that reached USD 16.1 billion. Deliveries and financial services saw a 56% growth in GMV. All in all, Grab's revenue for 2021 increased by 44% to USD 675 million. The following year saw even greater profits for the company as economies slowly began to reopen. Grab reported a 24% growth in GMV at USD 19.937 billion and a 112% YoY increase in revenue amounting to USD 1.43 billion (Grab Singapore, 2023).

List of Subsidiaries of Grab Holdings Limited

Legal Name	Jurisdiction of Incorporation
Grab Holdings Inc.	Cayman Islands
Grab Inc.	Cayman Islands
A2G Holdings Inc.	Cayman Islands
AA Holdings Inc.	Cayman Islands
MyTeksi Sdn. Bhd.	Malaysia
Grab PH Holdings Inc.	Philippines
MyTaxi.PH, Inc.	Philippines
Grabtaxi (Thailand) Co., Ltd.	Thailand
Grabtaxi Holdings Pte. Ltd.	Singapore
Grab Company Limited	Vietnam
GrabCar Sdn. Bhd. Malaysia	Thailand
Grabtaxi Holdings (Thailand) Co., Ltd.	Indonesia
PT Teknologi Pengangkutan Indonesia	Singapore
GrabCar Pte. Ltd.	Indonesia
PT Grab Teknologi Indonesia	Indonesia
Grab Rentals Pte. Ltd.	Singapore
GP Network Asia Pte. Ltd.	Singapore
PT Solusi Pengiriman Indonesia	Indonesia
PT Kudo Teknologi Indonesia	Indonesia
GPay Network (S) Pte. Ltd.	Singapore
PT Bumi Cakrawala Perkasa	Indonesia
J2 Holdings Inc.	Cayman Islands

Grab Corporate Structure



Amidst Grab's domination of the southeast Asian market, serious challenges face not only its competitors but more so the workers who are pushed towards the online platform industry. The company has faced increasing criticism and protests from various sectors, especially labor, regarding its treatment of workers as independent contractors instead of regular employees. There are around five million registered driver-partners (Grab, n.d.).

In its 2022 Shell Company Report, Grab (2022) openly admits that:

“If we are required to reclassify drivers as employees or otherwise, or if driver-partners unionize, there may be adverse business, financial, tax, legal and other consequences. The independent contractor status of drivers is currently being challenged in courts, by government agencies, non-governmental organizations, groups of drivers, labor unions and trade associations all around the world. Driven in part by developments in the United States and Europe, there has been growing interest in this area recently from regulators in Southeast Asia, where we operate. The tests governing whether a driver is an independent contractor or an employee vary by governing law and are typically highly sensitive to certain factors including, among others, changes in public opinion and political conditions.”

Yet Grab maintains its position that their driver-partners are independent contractors and the possibility of platform workers winning their rights to be recognized as regular employees is a threat that could trigger massive financial and legal consequences for the company. To add insult to injury, Grab (2022) blatantly opposes its workers from unionizing, stating:

“Furthermore, driver-partners may unionize and unionization may lead to inefficiencies in implementing policy or other changes or otherwise cause us to incur increased costs, including legal and other associated costs and adversely impact consumer experience. If the driver-partners unionize and invoke collective bargaining powers, the terms of collective bargaining agreements could materially adversely affect our costs, efficiency, ability to generate acceptable returns on the affected operations, financial condition and results of operations. In addition, disputes with driver-partners over union and collective bargaining issues could be disruptive and harm our reputation.”

Corporate policies prohibiting the exercise of workers, in this case Grab riders and drivers, to unionize weaken their capacity to bargain and assert their rights collectively with the corporate management.

The next section will delve into four countries in Southeast Asia where Grab operates, namely: Indonesia, the Philippines, Singapore, and Thailand. These countries were chosen to cover different contexts, such as income level, quality of public transportation, and existence of competition, where Grab operates.

II. Case Studies in Southeast Asia

1. Indonesia

Business Model

The rise of platform work in Indonesia can be traced back to 2015, when the most common mode of transport, motorcycle taxis locally known as ojek, were made available to customers via online booking. But Grab first entered the Indonesian market in 2014 through the GrabCar service. Then in 2015, it launched the GrabBike service, which integrated the local ojek riders into the super app. The company recorded 2,000 registered drivers only in the first two (2) weeks of its operation. Similar to other countries where Grab operates, riders are classified as independent contractors—or mitra (partner) in Bahasa.

Grab's most notable rival in Indonesia in terms of ride-hailing, food and grocery delivery, and digital payments is ride-hailing and delivery platform Gojek. In May 2021, there was a merger between Gojek and Tokopedia, an e-commerce platform, which successfully turned Gojek into a super app similar to Grab. There are about 2 million riders employed under Grab and a similar number under Gojek. Other competitors in the food delivery industry in Indonesia include FoodPanda and ShopeeFood.

The effects of the entry and virtual dominance of Grab and other ride-hailing platforms, specifically in the transport industry, were felt even more in 2016 as workers were pitted against each other when traditional taxi drivers clashed with motorcycle riders working for online apps. The taxi drivers were protesting the "unequal competition" in the industry as the proliferation of cheap taxis using ride-hailing apps Gojek, Grab, and Uber has made the traditional pick-up and drop-off taxi services unprofitable, threatening the business models of the country's top taxi firms. These online apps are offering cheaper ride fares to gain market share (Munthe & Da, 2016). Similar to Thailand and the Philippines, Grab faced hurdles in its operations in Indonesia as rules and regulations were unclear.

In 2016, Grab reported that Indonesia has become its largest market when it made a 250-fold growth in both GrabCar and GrabBike in the first half of the year (Balea, 2016). In 2017, Grab invested an additional USD 700 million in its franchise in Indonesia to fund research and development initiatives. By August of 2018, Grab reported that it had gotten hold of 65% of the Indonesian market.

Grab owns 39% of Indonesian financial tech company OVO and has announced in 2021 its plan to acquire more than double the current to up its share at 90%. OVO is one of Indonesia's largest e-wallets and Grab's move to acquire more shares secures its position at the top of the Indonesian digital payment ecosystem. As of 2019, OVO is valued at USD 2.9 billion (Reuters, 2021). In 2022, Grab acquired a 32.3% equity interest in PT Super Bank, cementing the company's place in the digital banking ecosystem. It also entered into strategic partnerships with PT Elang Mahkota Teknologi, an Indonesian group with a portfolio of media, all-commerce, and content production businesses, as well as with PT Trans Retail, a hypermarket chain.

In terms of investments and ownership structure, Grab Holdings Limited (2021) Shell Company Report states:

"In addition to our ownership of 79.6% of the shares, which, due to a dual-class structure, represent a 30.2% voting interest, of PT Bumi Cakrawala Perkasa ("BCP") through which we own OVO and conduct our financial services businesses in Indonesia, we have contractual rights to (a) control the appointment of the Chief Executive Officer, and the Chief Financial Officer (including the right to nominate any such officers as directors or as president director), (b) approve the budget and business plan of BCP and its subsidiaries; (c) approve future funding of BCP and its subsidiaries, whether through debt, equity or otherwise, and (d) certain economic rights with respect to the remaining shareholding of BCP. We conduct our point to point courier delivery business through PT Solusi Pengiriman Indonesia ("SPI"), in which a 94.12% owned subsidiary owns 49%, and we conduct our car rental (with driver-partners) business through PT Teknologi Pengangkutan Indonesia ("TPI"), in which a wholly-owned subsidiary owns 49%. We have entered into contractual arrangements with a third-party Indonesian shareholder (in the case of SPI) and a senior executive (in the case of TPI), each of

which holds 51% of the shares of SPI and TPI, respectively, as a result of which we are able to control SPI and TPI and consolidate their financial results in our consolidated financial statements in accordance with IFRS. The non-controlling interests of minority shareholders in BCP are accounted for in our consolidated financial statements.”

On September 7, 2022, the Indonesian Minister of Transportation (MOT) issued two important decrees, namely Decree No. 667 Year 2022 (MOT Decree 667/2022) and Decree No. 1001 of 2022 (MOT Decree 1001/2022), which significantly impacted the commission charged by Grab to their driver-partners (Grab Holdings Limited, 2022).

MOT Decree 667/2022 reduced the maximum commission percentage that Grab could charge their driver-partners from 20% to 15% of the total tariff. This means that Grab's share of the earnings from each ride decreased, providing more income to the drivers.

In addition, through MOT Decree 1001/2022, the Ministry of Transportation introduced an option for driver-partners to be charged a supporting fee. This fee is separate from the commission and is set at a maximum of 5% of the total tariff. The decree specified that the supporting fee should be reinvested into the welfare of the driver-partners, aiming to enhance their benefits and working conditions.

The supporting fee can be utilized to provide various benefits and services to the drivers, including:

1. Extra safety insurance to complement the mandatory national health insurance coverage.
2. Social and employment security programs to offer more protection to the driver-partners.
3. An information center to assist drivers with their complaints and concerns.
4. Operational cost assistance for items such as phone credits and necessary equipment, ensuring smooth operations for the drivers.

These decrees were put in place to address the welfare and rights of app-based driver-partners and to ensure they receive fair compensation and improved support in their work. Grab may be sanctioned by the Indonesian government if it fails to use the supporting fees for the permitted purposes. In its 2022 Shell Company Report, the corporation alleged that it complied with said decrease, including the periodic report requirement (Grab Holdings Limited, 2022).

Economic Power

In Indonesia, Grab's revenue for years 2020, 2021, and 2022 was USD 61 million, USD 79 million, and USD 275 million, respectively.

Grab has over five (5) million registered merchant-partners in Indonesia that range from local entrepreneurs, including small restaurants, convenience stores, and grocery stores, to multinational franchises and lifestyle service providers, such as hotels and travel agents.

Labor Situation

In 2021, Grab and rival Gojek received a “generally poor performance” rating in terms of workers’ conditions, according to FairWork, an organization that looks into the effects of technology in labor (Sri, 2021).

The lack of clarity in terms of workers’ rights and benefits for platform workers in Indonesia has contributed further to precarious working conditions in the country. Worsening conditions have pushed workers to form unions and other workers’ organizations to demand changes. According to a survey done in 2021 by non-profit tech publication Rest of World and research company Premise, some 60% of respondent platform workers said that they would join a labor organization (Timmerman, 2021).

Despite being officially designated as partners by the platform company, Grab drivers do not enjoy any actual rights as partners. Indonesia’s Law No. 20/2008 on Micro, Small, and Medium Businesses states that a partnership relationship is characterized by equal decision-making authority, where neither party dominates or is dominated. This sets it apart from an employer-employee relationship. However, in practice, the partnering parties are not on equal footing. Grab unilaterally determines all work arrangements and decision-making processes, disregarding the input and concerns of the drivers, thus establishing a deceptive partnership arrangement (Novianto, 2023).

According to Novianto (2023), Grab implemented a strategy from 2015-2019 of aggressively spending money to attract both drivers and customers, commonly referred to as a “money-burning” strategy. This strategy is used by startup companies to finance marketing efforts by spending capital funds (Prasetiya Mulya Executive Learning Institute, n.d.). In 2018, the average daily gross income of Grab drivers was IDR 458,093, equivalent to USD 29.73 (with an exchange rate of USD 1 to IDR 15,416). However, as the money-burning period came to an end, drivers experienced a significant decrease in earnings. The most notable decline occurred during the COVID-19 pandemic, with drivers’ average gross income dropping from IDR 273,746 (USD 17.77) per day in February 2020 to IDR 85,085 (USD 5.52) in April 2020. Even after the implementation of the post-COVID-19 new normal period in Indonesia, Grab drivers did not see a significant increase in their income (Novianto, 2023).

Platform workers, including those under Grab Indonesia, have been actively participating in initiatives to organize workers’ unions and other forms of labor organizations. Protest actions against unjust company policies have been increasingly occurring. UK-based publication Notes from Below reports that during the COVID-19 pandemic, there was a noticeable increase in protests, particularly among app-based drivers. From March 2020 to March 2022, a total of 71 protests involving app-based drivers were recorded, with 34 of them (47.9%) involving Grab drivers specifically. Protest actions by Grab drivers took various forms, including street demonstrations (26 actions), strikes (22 actions), blockades of Grab offices (two actions), and hearings with the government (one action). The primary methods employed by the drivers were typically a combination of mass actions outside government buildings and Grab offices, along with strikes where they would log off the app. In some cases, protests were conducted entirely online and remotely, where drivers collectively logged off the apps without engaging in street-level demonstrations (Novianto, 2022).

2. Thailand

Business Operation and Model

GrabBike debuted in Thailand in 2015. In 2016, however, the Thai government suspended the operations of Grab and Uber's taxi service. It declared that GrabBike and UberMoto operations were illegal and privately owned motorcycles used by their riders were not registered with the Department of Land Transportation as public transport vehicles. Arrested drivers were fined up to THB 4,000 (USD 120)¹ (Chuwiruch, 2016). In February 2018, while Grab's operation's legal status was still in limbo, GrabFood was launched, bridging consumers to food merchants (Grab Thailand, 2019). In this service, Grab collects 35% commission from the food merchant. This rate was only reduced to 30% at the backdrop of the ravaging COVID-19 pandemic (Leesa-Nguansuk & Arunmas, 2020). In the case of partner-drivers, four-wheeled drivers must pay 25% of their income, while two-wheeled drivers (riders) must pay 15% (for ride-hailing and food delivery).

In March 2018, Grab and Uber closed a deal with the former, acquiring Uber's ridesharing and food delivery businesses in Southeast Asia. In exchange, Uber acquired a 27.5% stake in Grab (Leesa-Nguansuk, 2018). The deal compelled the Philippines, Singapore, and Vietnam to review this transaction to assess its effect on market competition. In the case of Thailand, it was only December of that year that its merger control rules became effective (Asuncion, 2019).

In 2019, the country's transport ministry announced that ride-hailing apps will be legal by March 2020 and will release guidelines by then. In the same year, GrabTuktuk Electric was launched in Chiang Mai. Tuk-tuk is one of the popular local modes of transportation in Thailand (Taylor, 2019). However, many tuktuk operators are forced out of business due to cutthroat competition with new forms of transportation arrangements, which include Grab's mobility services as well as illegal tuk-tuk operators (Thaiger, 2018). The company also launched Grab Kitchen in the same year. GrabKitchen is the largest cloud kitchen in the region (Techsauce, 2019).

Grab Thailand and Krungsri, a local bank, launched Grab's First Personal Loan in 2022. This lending facility provides loans to grab users at the maximum of THB 100,000 (USD 3,003) (Nation Thailand, 2022). By September of the same year, the company obtained an operator license from the Department of Land Transport under the Ride-Hailing Act (Tortermvasana, 2023).

At present, Grab Thailand has three main services provided to consumers: delivery, mobility, and financial services. Delivery services include GrabFood, GrabMart, and GrabExpress. Mobility services include GrabTaxi, GrabCar, JustGrab, Rent, GrabBike, and Ride Cover. Financial services, meanwhile, include GrabPay and GrabLending. Other services include hotels, gift cards, rewards, and packages.

As to ownership structure, the 2021 Shell Company Report of the Singapore-based Grab Holdings, Ltd. (2021) pertinently provides:

¹ USD 1 = THB 33.304 on 16 October 2024 (See: <https://www.bot.or.th/en/statistics/exchange-rate.html>)

“Our deliveries, mobility and financial services businesses are each conducted through a Thai operating entity (including, in the case of mobility, Grabtaxi (Thailand) Co., Ltd) established using a tiered shareholding structure, so that each Thai entity (including Grabtaxi Holdings (Thailand) Co., Ltd) is more than 50% owned by a Thai person or entity. This tiered shareholding structure, together with certain rights attendant to the classes of shares we hold and as otherwise set forth in the organizational documents of the relevant entities within our shareholding structure in Thailand, enables us to control these Thai operating entities and consolidate their financial results in our consolidated financial statements in accordance with IFRS. The non-controlling interests of relevant Thai shareholders are accounted for in our consolidated financial statements.”

While the company is a subsidiary of Grab Holdings, Ltd., Grab Thailand is partly owned by other corporate entities. Some of its biggest investors are the Central Retail Corporation (CRC) and the Central Group, Thailand’s largest omnichannel retail conglomerate. In 2019, Central Group invested USD 200 million in Grab Thailand and acquired a significant non-controlling stake in the company (Grab Thailand, 2019). Subsequently, CRC allotted THB 4.5 billion (USD 135 million) to acquire additional stakes in Grab Thailand through Porto Worldwide Limited. The stated amount was used to buy 67% of the shares of Porto, which in turn owns 40% of the shares of GrabTaxi Holdings Thailand (Central Retail, 2021).

Economic Power and Market Dominance

In 2021, on-demand commerce is dominated mainly by three superapps, namely: Grab, Lineman Wongnai, and FoodPanda. According to Creden Data, a data analytics provider, Grab raked in revenues amounting to THB 12.7 billion (USD 381 million), representing 44% of the market share. This was followed by Lineman Wongnai, with the revenue amounting to THB 9.4 billion (USD 282 million) representing 36.2% market share. FoodPanda came in third with revenue of THB 6.7 billion (USD 201 million), representing 23.4% of market shares. A distant fourth is Robinhood, with revenue amounting to THB 15.8 million (USD 474,000), representing 0.1% of market shares (Leesa-Nguansuk, 2022).

Specific to ride-hailing, Grab dominates the service, with Bolt at a distant second. Bolt, an Estonia-based company, entered the Thai market only in 2020 and presently limits its service to transportation. According to Measurable AI, an alternative data provider on the digital economy in emerging markets, Grab maintains its lead in the ride-hailing market. By order volume, its share was 88% in January 2021 and at 67% in March 2022. In terms of market share by sales, Grab’s share was 91% in January 2021 and at 72% in March 2022. While a gradual decline can be observed, Grab maintained its dominant position in this specific market (Sheng, 2023)

In terms of brand popularity, Grab has a significant lead over its competitors. In a survey conducted by Black Box Research (2022), a Singapore-based advisory firm, Grab is the most-used ride-hailing app in Thailand, according to 80% of the respondents. Line Taxi came in second with 11%. In the post-pandemic future, Grab remains the most preferred brand for taxicab booking with 82%, followed by Line Taxi with 15%.

In food delivery service, GrabFood has a big lead over its competitors based on

Momentum Works' three annual reports on the food delivery platforms in the region. In 2020, GrabFood held half of the country's GMV, with FoodPanda at 23% as a distant second (Voon, 2021). In 2021, GrabFood held 47% of the GMV in the country (Cordon, 2022). FoodPanda and Lineman were in second place at 22%. GrabFood maintained its lead in 2022 with 51%, followed by Lineman at 24% (Nabila, 2023). As of January 2023, Grab's area of service covers 58 out of 78 in the country (Teerakowitkajorn, 2023).

This overwhelming dominance of Grab as a superapp in Thailand translates to its sales. In 2021, the Grab entity in Thailand amassed sales amounting to USD 76 million. It increased by 43% the succeeding year to USD 109 million. By 2023, it almost doubled with USD 205 million (MarketScreener, n.d.).

While Grab leads the Southeast Asian market, it consistently incurred net losses as it spent on warding off competitors (Bloomberg News, 2023). In its effort to break even by the end of 2023, Grab Thailand entered into a partnership with the Tourism Authority of Thailand (TAT). The partnership is aimed at boosting the country's tourism by attracting more tourists and reaching 25 million visitors by the year-end (Leesa-Nguansuk, 2023).

Labor Situation and Struggles

In 2019, GrabFood riders from the provinces of Nakhon Ratchasima, Khon Kaen, and Udon Thai protested the reduction of delivery fees. In Udon Thani, which had by that time 1,381 delivery riders, expressed their opposition over the reduction of the delivery fee from THB 40 (USD 1.20) to THB 30 (USD 0.90) charged for the first five kilometers. While there was an increase in the fee for the distance past five kilometers (THB 6 from THB 5), riders argued that most orders are within a five-kilometer radius. On top of such a reduction in their earnings were the expenses they shoulder for internet access, mobile load, fuel, and the maintenance of their motorcycles (Ban Muang, 2019).

In late 2020, Grab riders protested in the streets of Bangkok to register their demands to the company (Hicks, 2020). There are 300,000 Grab riders registered with Grab Thailand; around 100,000 of them are active riders and the majority are freelancers (Chantanusornsiri, 2020). The protesting riders opposed the rule requiring riders to use the official green containers. Akkanut Wantanasombut, researcher at Chulalongkorn University's Institute of Asian Studies, explained that such a requirement will limit the capacity of riders to offer both delivery and taxi services as the container takes up the passenger seat (Samejaidee & Hicks, 2020). This policy was recalled eventually by the company due to pressure from below. Riders also raised their concern over limited insurance protection, limited operating hours of the company's call center, and perceived unfair suspension of riders (Hicks, 2020).

While they raised several concerns and demands, lowering Grab's cut from their income was not one of them. Kriangsak Teerakowitkajorn, managing director of the Just Economy and Labor Institute, a Thai labour rights nonprofit organization, suspected that such an omission in the riders' demands was "because of Grab's narrative that they are losing a lot of money, so the workers cannot demand higher pay or the company will go out of business and the workers will lose their jobs." He furthered, "I find that problematic because this is a different business model, where these platform companies are willing to lose money by subsidizing customers in order to build their networks" (Hicks, 2020).

After almost a decade in limbo, Grab Thailand was granted legal recognition by the country's transportation department in 2022. However, the legal relationship between the company and its "partner" drivers remains unclear. In a survey of 1,136 food delivery riders across different apps conducted by Rocket Media Lab (2021), and in which 1 out of 4 are Grab's, the respondents lamented that they are considered "independent workers" of these companies and not as regular employees. This scheme aims to cut costs in hiring these partner-riders. Resultantly, riders providing ride-hailing services still need to register their motorbikes for public use and obtain the same license applied for by traditional motorcycle taxis. Food delivery riders, on the other hand, remain unregulated. Pertinently, the same survey accounts for 16.2% of the respondents raising their demand for full employee status. This demand came in second among the respondents' list of demands in relation to their employment as riders.

On the other hand, it was found that 65.96% of the respondents already encountered around 1-4 accidents. Around 17% already experienced 5-10 accidents and 7% were those who encountered between 11 and 16 accidents. From the foregoing, it is unsurprising that financial compensation for accidents came first in the demands of the surveyed riders at 26%.

In November 2022, around 800 GrabFood and GrabMart riders staged a protest at their company's headquarters to register their dissent against the change of rules issued by the company. Grab required them to take two deliveries at a time, thereby reducing their orders and earnings. The company also imposed a zoning system for their riders, which lessens the area covered by the riders. Old rules allowed riders to take orders throughout Bangkok (Thai PBS World, 2022).

Grab riders also raised their concerns over the quota system imposed in 2021. Under the scheme, riders are classified into tiers: "champions," "hybrids," and "GB." Champions are required to complete at least 95 orders per week to receive a stipend of THB 5,000 (USD 150). Hybrid, on the other hand, are required to complete 45 orders to receive a THB 3,000 (USD 90) stipend. Riders who are unable to meet such a quota are demoted to the GB tier. One rider explained that riders in this tier earn less than those in other tiers. On top of this scheme, riders also compete for the time slot they need to book before starting their shift, making it harder for others to comply with the quota requirement (Itthipongmaetee, 2022).

3. Singapore

Business Model

Grab, then MyTeksi, began its operations in Singapore in October 2013 with the launch of GrabTaxi. It continued to further expand its services with the introduction of its limo service, GrabCar, in 2014. In the same year, the Land Transport Authority issued the registration for Grab and Hailo (TODAY, 2015). At present, Grab takes commissions, in which rates vary depending on the type of ride services. For GrabCar, the company takes a maximum of 20.18% commission. In the case of GrabTaxi, the company takes a

commission amounting to SGD 0.60 (USD 0.46)² for Standard Bookings and SGD 1.00 (USD 0.76) for Premium Bookings. For GrabHitch, the company takes a 10% platform fee from its drivers (Grab Singapore, n.d.).

GrabPay Credits was introduced in 2016 as a stored-value option within the app (The Business Times, 2016). It eventually expanded its application with the option for payment for delivery and other services. Now, GrabPay is one of the largest payment services in Singapore, which charges 1% for local transactions and 7% GST (Goods and Services Tax) (Linkflow Capital, 2022).

With the demise of UberEats and Grab's acquisition of Uber's Southeast Asian operations, the company launched GrabFood in May 2018 (Lim, 2018). It was initially piloted in certain regions of Singapore and eventually launched in different countries in Southeast Asia. Its courier service was launched by October of the same year with GrabExpress (Cheok, 2018).

In 2020, the Monetary Authority of Singapore (MAS) issued four digital bank licenses, one of which was granted to the consortium of Grab and Singtel (Reuters, 2020). The said consortium founded the GXS Bank in 2022, one of the first digital banks in Singapore. The online-only bank was integrated with the Grab app in the same year (Mulia, 2022).

Market Dominance

Similar to its counterpart in Southeast Asia, Grab dominates the Singaporean delivery and ride-hailing markets. According to Measurable AI, Grab has an average of 50.33% of order volume share in the ride-hailing market for the first quarter of 2022. Gojek came in a distant second place (around 17%) and was followed by the CDGTaxi (around 15%), Tada (around 10%), and Ryde (around 6%) (Sheng, 2022). In a study by Blackbox Singapore (2022), Grab is the most-used app in Singapore with 74%, followed by Comfort with 11%. A post-pandemic future will see a tightened hold of Grab to its dominance in taxi/car bookings. Seventy-eight percent (78%) of the respondents picked Grab as their most preferred app post-pandemic. Gojek followed with 13% and Comfort with 12%.

The same pattern can be gleaned from the food delivery market. As of May 2022, Grab holds 56% of the market. Foodpanda came in second with 35% and Deliveroo with 8% (Koh, 2023).

Labor Situation

Delivery riders are a big part of Singapore's labor force. According to data, platform workers in Singapore are about 73,000, and around 16,000 of them are in food delivery (Yip & Grosse, 2023).

While Grab takes a 30% commission on the order value for each merchant, delivery riders earn through their share in the delivery fee paid in each order. The delivery fee ranges from SGD 3 (USD 2.29) to SGD 5 (USD 3.82) and is also subject to price surges (SmartCity Kitchens, 2022). According to Glassdoor.sg, the typical hourly wage of a

² USD 1 = SGD 1.31 as of 16 October 2024 (See: <https://www.bloomberg.com/quote/USDS-GD:CUR>)

Grab rider is around SGD 12 (USD 9.16). This is only half of the average hourly salary in Singapore, which is at SGD 23.36 (USD 17.83), according to Dollars and Sense (Koo, 2021).

Channel News Asia released an article that tackles the situation of food delivery riders. Some delivery riders started during the pandemic with the promise of quick cash and flexibility of hours. However, the reality of food delivery work turned out to be more difficult (Yip & Grosse, 2023). According to one of the riders interviewed by Channel News Asia:

“After 8am, his delivery jobs slow to a trickle until 11am. That’s because Grab, the platform he’s with, ranks its food delivery partners and Ho’s ranking does not accord him priority for jobs during that period, he told Talking Point host Steven Chia, who shadowed him for two days. On the first day, their shift was cut short after earning a mere S\$17.30. The next day, they pocketed S\$37.30 after 10 hours and seven bookings.”

Occupational safety is also a concern among delivery riders. They are prone to accidents being on the road all day long. In the cases originally published in TODAY last 2022, there were five fatal accidents among delivery riders in just an 18-month span, which alarmed the Parliament. With the rising cases of accidents, some riders have opted to use Personal Mobility Devices or PMD so they can avoid going through the road. However, this makes them vulnerable to fines as the use of PMD was banned on footpaths in 2020. The labor condition prompts some riders to work 16 hours a day on a 6-day per week basis, which also makes them more accident-prone aside from other health issues (Lim & Ong, 2022).

Social protection is also one major concern among delivery riders. While Grab and other food delivery companies provide some sort of insurance for riders, some have claimed that they are unclear about their insurance coverages. One of the riders interviewed by TODAY mentions:

“Mr Dylan Tan noted that riders would have to trawl through a lot of information to find out what the insurance covers. He added that some riders also may not be covered due to illegal modifications — including installing a power on-off switch — made to their electric bicycles. These modifications would render the riders ineligible for insurance coverage” (Lim & Ong, 2022).

Riders have expressed that while there is insurance available, it is insufficient. Experts also agreed that there is much to be done to ensure the safety of riders, from changes in road policies to improvements in the algorithm of the app, as well as stronger legislation that promotes their rights (Lim & Ong, 2022).

Part of ensuring the rights of the riders is genuine representation. In 2016, Grab Holdings Inc. partnered with the National Private Hire Vehicles Association (NPHVA), an affiliate of the National Trades Union Congress (NTUC), to serve as the voice of the riders (Grab Singapore, 2016). While it is important that riders have a voice and that there would be someone to mediate for them, genuine representation should start from the riders themselves. With the company itself spearheading this initiative, Grab set the incentives for members joining the association, which can be considered a conflict of interest and might compromise the interests of the riders.

4. Philippines

Business Model and Operations

In July 2013, Grab entered the Philippine market as GrabTaxi. In 2015, Grab relaunched GrabCar services (Icasiano & Taeihagh, 2021). GrabFood was then introduced in the local market in 2018 following the launch of GrabAssistant a few months prior (Rappler.com, 2018). At present, Grab offers the following services in the Philippines: GrabFood, Mart, Express, and Pabili in delivery services; financial services in the forms of GrabPay, Insurance, Airtime, and Bills; mobility services such as GrabCar, GrabTaxi and Rent by Grab. In addition, Grab Philippines acquired MoveIt, a motorcycle taxi firm, in 2022. Other services offered by Grab include GrabHotels, Giftcards, and Rewards (Grab Philippines, n.d.).

For its revenue model, Grab takes a maximum of 20% commission for every booking. The same rate applies for both drivers and delivery riders (Grab Philippines, n.d.).

Economic Power, Market Dominance, and Contribution to National Economy

GrabFood consistently ranked first in the most used food delivery app in Metro Manila according to a series of surveys by Kantar TNS between December 2018 and March 2019. In December 2018, 47% of the respondents voted GrabFood as their app of choice, which was followed by FoodPanda with 30% and HonestBee with 23%. The gap between GrabFood on the one hand and FoodPanda and HonestBee on the other widened in the succeeding surveys. To wit, the March 2019 survey showed that 62% of the respondents voted GrabFood as their app of choice. FoodPanda was the distant second with 21% and closely followed by HonestBee with 18% (F&B Report, 2019).

In a 2023 survey of Statista, 70% of the 10,345 respondents were using Food Panda. GrabFood closely followed with 62%, while 17% of the respondents were using other food delivery apps (Balita, 2023).

In addition to GrabFood, Grab Philippines has had a monopoly in the car ride hailing space since they acquired Uber's operation in Southeast Asia. In the same year, the government estimated that Grab held 93% of the Philippine market (Jiao, 2018). It was only in recent years that new apps entered the competition, such as JoyRide Car in 2022 and inDrive in 2023 (Rivas, 2022; Guiao, 2023).

The dominance of Grab on different platforms reflects in their corporate profits and the Philippines' economic output. In a 2024 study of the University of Asia and the Pacific (UA&P), Grab Philippines contributed between 0.07% and 0.3% of the country's Gross Domestic Product (GDP) from 2019 to 2021. This translates to values between PhP 37 billion (USD 640 million)³ and PhP 165.5 billion (USD 2.86 billion) (Buday, 2024). In comparison, the mining industry contributed 0.65% to the country's GDP in 2021 (Mines and Geosciences Bureau, 2024).

³ 1 USD = PHP 57.78 as of 16 October 2024 (See: <https://www.bloomberg.com/quote/USD-PHP:CUR>)

The study also found that Grab has an economic output multiplier of 3.42. This means that every peso spent on Grab's platforms infuses an additional PhP 3.42 in the national economy. Such a multiplier is even higher than the mining industry, a heavy industry.

In addition, Grab Philippines records a household income multiplier of 0.44. It suggests that every peso spent on Grab services accounts for an additional PhP 0.44 to workers in the ride-hailing market. This is equivalent to between PhP 23.8 billion (USD 412 million) and PhP 40.3 billion (USD 697 million) of Grab's contribution to total family income.

Between 2019 and 2021, Grab's operations reduced the average number of unemployed by 1.1 to 1.6% (UA&P, n.d.). In 2022, Fairwork Philippines estimated that Grab employs 40,000 delivery riders (Garcia, 2023).

Labor Situation

Grab Philippines, similar to its Southeast Asian counterparts, treats riders and drivers as independent contractors. This arrangement entails that no employer-employee relationship exists between the rider/driver and the corporation. Consequently, these transport workers are not entitled to receive benefits and have no security of tenure, which regular employees have. The situation creates conditions of vulnerability for riders/drivers, such as income insecurity and uncompensated workplace-related accidents, among others.

In a report from Bulatlat, an alternative media outfit, one rider has narrated that he merely receives PhP 1,000 from a 17- to 20-hour workday. Such an income is proven insufficient with the steep price increases of basic goods. According to the Ibon Foundation (2024), an independent think tank, a family of five members living in Metro Manila requires PhP 1,206 per day to sustain its basic food and non-food needs. Income insecurity, which compels riders to work for long hours, also pose threats to the rider's health. It also entails a lack of adequate rest, which increases the likelihood of road accidents (Gomez & Cecille, 2023).

In October 2023, Grab issued a new profit structure for its riders wherein the base fare is set at PhP 35.00 (USD 0.61), down from PhP 45.00 (USD 0.78), and PhP 7.00 (USD 0.12) per kilometer compensation, previously PhP 10.00 (USD 0.17). Such a move by Grab was protested by riders in a series of protest actions (Garcia, 2023).

Grab cyclists face similar income problems. In a report by EILER, they interviewed Grab cyclists and discussed the following:

“Alex” (not his real name) was a healthcare worker stationed at a hospital before the pandemic. He applied as a delivery cyclist for Grab just two weeks before the pandemic hit the country. The flexible working hours and higher wages attracted him to shift from a hospital job that could potentially get him infected with the virus towards what he initially thought as a more laid-back option. Alex shared that he used to earn PhP 1,500 in just four to five hours. The same holds true for “Gaby” who used to be a musician, and “Tristan” who was a real estate agent and a father of three (not their real names).

At the height of the pandemic in April 2020, delivery cyclists under GrabFood Philippines

used to earn PhP 79 per trip. Some workers would even earn as much as PhP 800 in just six successful deliveries, almost PhP 300 more than the 8-hour minimum wage in the country's capital. Nowadays, they earn as little as PhP 48 for every delivery within a 5-kilometer radius. The cyclists say that the rates changed without prior notice. Even the incentives which earned them a maximum of PhP 770 for every 11 successful delivery jobs now only amount to PhP 390 for the same number of trips" (Porras et al, 2021).

Grab also required some out-of-pocket expenses despite being work-related. The report continued:

"The 'independent contractors' are required to provide their own tools and resources (i.e., vehicles, smartphones, mobile data, safety gears). A delivery rider shared that Grab also recommends the 'partners' to purchase from the company dri-fit shirts and requires the purchase of the delivery thermal bags with logos, which can cost as much as PhP2,500. At current market value, the price of a single shirt considering its quality can be sold around PhP35 only and the thermal bag is sold around P800. When ordered in bulk, such as for the number of the delivery riders at present, the prices can even be lowered" (Porras et al, 2021).

The 'partner-rider arrangement leaves riders/drivers vulnerable to system glitches, fake bookings, and accidents. Bulatlat reported that riders need to have at least 200 bookings in 21 days before they can be entitled to accident insurance. Further, they can claim against the insurance only when the accident occurred while they were working and the application is on. The rider interviewed lamented: "[i]t causes inconvenience to the riders since the process is tediously long and hard for us. It needs police reports, incident reports, barangay coordination, and the casa's checking in case our motors are still under installment, among others." Cash assistance in case of accidents, meanwhile, only amounts from PhP 500 (USD 8.65) to PhP 1,000 (USD 17.31) (Gomez & Cecille, 2023).

There were instances in the past years where Grab riders/drivers were killed while at work. In 2017, Grab driver Gerardo Maquidato was killed by thieves disguised as passengers (Cabalza, 2017). In 2019, Grab driver Maria Cristina Palanca, 33, and her car went missing after she received a booking. She was found dead the following week (Marquez, 2019). In 2020, at the height of the pandemic, Grab rider Paul Michael Salvio, 22, was fatally injured after being hit by a van (Marquez, 2020). Last year, a 30-year-old Grab rider was run over by a 10-wheeler truck. While Grab offers financial assistance, its assertion that riders/drivers are not its employees exonerated the corporation from full responsibility to the victims and their bereaved families (Baron, 2023).

In a report Fairwork Philippines (2022), it gave GrabCar, GrabFood, and GrabExpress a score of three out of ten in terms of fairness in working conditions. Said report also evaluated other platforms and observed: "[t]he ratings achieved by platforms in the Philippines are relatively low and indicate a significant need for improvement if gig workers are to enjoy decent work standards."

III. Analysis

Business model

The business model of Grab across the subject countries is generally the same. The company primarily earns profit through a set rate of commission for each booking or delivery. It also earns commission from merchant-partners. While in most countries Grab has the complete prerogative to determine the commission rate it receives, the case of Indonesia presents quite a different story. Through MOT Decree 667/2022, the government has set at the maximum of 15%, previously 20%, the rate that Grab can charge against its riders/drivers. A similar move was implemented in Thailand in 2021 but only as an emergency measure to boost the economy, which stagnated during the pandemic.

While Grab offers varied services, it has had a remarkable expansion in digital financial services in the past years. In Indonesia, Grab has acquired significant equities in OVO, a major local e-wallet company, and PT Super Bank. In Thailand, Grab has entered into a partnership with Krungsri, a local bank, in providing lending services to its users. Meanwhile, in Singapore, the consortium of Grab and Singtel acquired a digital bank license in 2020 and has operated one of the first digital banks in Singapore since 2022. In 2022, financial services reported 54% year-on-year revenue growth compared to 11% in deliveries and 19% in mobility (Kavout, 2024).

Economic Power and Market Dominance

Six years have passed since the departure of Uber from the Southeast Asian market, yet Grab is able to maintain effectively a monopoly across different lines of services. In Thailand, Singapore, and the Philippines, Grab maintains its dominant position in ride-hailing and delivery services. While other apps, such as FoodPanda in the Philippines, Comfort in Singapore, and Bolt and Line in Thailand trail far behind Grab in terms of sales and brand popularity. Even in Indonesia, where it has its local super app (Gojek), it is in close and cutthroat competition with Grab.

The process of monopolizing the market, however, comes at a cost for traditional players in the market. In Thailand, many tuk-tuk operators and drivers were driven out of the industry due to the incorporation of tuk-tuk in Grab's lines of service as well as other transport services provided by the super app. Turf wars between motorcycle taxi groups intensified after the entry of Grab in the local market. In 2019, it led to the murder of two riders (Fullerton & Jirenuwatin, 2019). In Indonesia and the Philippines, traditional taxi operators and drivers protested what they described as unequal competition between traditional taxi and ride-hailing services, the latter providing cheaper options for consumers.

The lack of well-functioning public transportation in the region is a condition that enabled Grab's monopoly. Southeast Asia, along with other underdeveloped states, is characterized by poor investment in public transportation, which led to the rise of informal transport services as alternatives. Investments in public transport are unable to keep up with the pace of rapid urban expansion. Hence, informal modes of transport, coined as Locally Adapted, Modified, and Advanced Transport (LAMAT), proliferate and include jeepneys,

passenger vans, auto-rickshaws, and two- and four-wheeled taxi services (Chalermpong et al., 2022). Grab was able to take advantage of such a condition and consolidate those transport services in one digital application. Further, the improvements in digital and internet connectivity in the region have facilitated the accessibility of Grab to millions of Southeast Asian consumers.

Labor Situation and Struggles

Common in the subject countries is that riders and drivers are not considered by Grab as its employees. As a consequence, the lack of an employer-employee relationship exposes riders and drivers to different forms of vulnerabilities:

The first of which is income insecurity. The riders and drivers raised the same sentiments that they were enticed to enter the industry due to promises of flexibility in schedules as well as decent pay. When the pandemic hit, many were forced to stop working due to government-imposed restrictions on mobility. However, their incomes did not significantly recover even after the pandemic. As the number of riders continue to pile up coupled with policies that reduce riders' and drivers' profit shares, they are forced to work longer hours. This has opened new vulnerabilities, primarily health problems and accidents brought on by a lack of sufficient rest. As Grab asserts that riders are not their employees, it has escaped responsibility to cover medical expenses in cases of work-related illnesses. While accident insurance is available, riders are of the common sentiment that compensations are not enough and they are required to undergo tedious processes before they could claim the meager amount.

Second, Grab wields vast and tight control over the retention of riders on the platform. Grab asserts that it is a digital technology company that only provides a platform for riders/drivers and consumers/passengers to transact. However, the experience of its rider-partners betrays such a claim. In many instances, riders protested against what they describe as unjustified suspension or banning of riders from the application without due process. The suspension is observed to be a response against riders' participation in mass actions opposing unfair Grab policies. Further, Grab sets rules such as a tier system and setting time slots, which largely affect the income of its riders. This overwhelming control that Grab has over its riders weakens the capacity of riders and drivers to bargain against the company. It is worsened as Grab deals with grievances individually. The company does not engage with its riders collectively, consistent with its assertion that riders are independent contractors, not employees.

IV. Conclusions and Recommendations

Grab has proven to be one of the main drivers of the gig economy. The departure of the superapp Uber in the Southeast Asian market has allowed Grab to virtually monopolize the region amidst attempts by new players to compete against. The study delved into four Southeast Asian countries, namely the Philippines, Indonesia, Thailand, and Singapore, to identify patterns and differences on how Grab operates business in these markets, its level of dominance and economic power in each subject country, and the labor situation of its rider-partners and their struggle for decent and fair working conditions.

The study has found glaring similarities as to how Grab conducts its business in these four

countries. Aside from the commission-based incomes, these markets also reinforce the expansion of Grab in the financial services industry.

As to its market dominance and economic power, Grab has maintained its overwhelming lead against its competitors since the departure of Uber. This holds true even in Indonesia, where a local superapp also thrives.

While Grab thrives in these countries, income levels of its riders and drivers ironically drop due to company policies that reduce income. Further, absence of employer-employee relationship (EER) worsens labor situation and places riders/drivers in other susceptibilities.

From the foregoing, state policies shall be put in place to address dire labor conditions of Grab drivers. One of which can be the replication and institutionalization of policies that will set a ceiling on Grab's commission rate, as was done in Indonesia. Governments should also re-evaluate their policies on independent contracting amidst the fast-growing platform and gig economy, where such an arrangement is abused by corporations.

Further, it is high time that Grab recognize its drivers and riders as its employees, as well as ensure decent and stable income and humane working conditions for the latter.

As the drivers and riders continue to champion their rights, they can learn from past and ongoing experiences in organizing and mobilizing their ranks to attain security of tenure and decent income. Steps were already being taken to contest, in a variety of ways, Grab's aggressive business model. Cases filed in official courts contesting arbitrary and unfair labor practices by Grab are constantly being won by workers who have decided to collectively take on the platform giant.

While Grab is seemingly on its way to perfecting the model for exploiting the gig economy to extract maximum profits, workers must continuously make strides in educating and organizing themselves. Organized platform workers in other countries have successfully pushed for pro-worker policies to challenge Grab's dominance. There is a lot to learn from each other. A well-consolidated region-wide campaign for platform workers' rights is a possibility that is better realized sooner than later.

###

References

- Asuncion, A. (2019, November 20). Hailing Grab Across Asia. Philippine Competition Commission. <https://www.phcc.gov.ph/column30-bm-caca-grab-seasia/>
- Balea, J. (2016, July 14). Indonesia becomes Grab's biggest market as car, motorcycle services grow 250-fold. Tech in Asia. <https://www.techinasia.com/indonesia-grab-biggest-market>
- Balita, C. (2023, June 5). Popular food delivery apps Philippines 2023. Statista. <https://www.statista.com/statistics/1278591/philippines-commonly-used-food->

delivery-apps/#:~:text=According%20to%20a%20survey%20on,that%20they%20used%20Grab%20Food.

Ban Muang. (2019, November 6). แกร็บเปิดตัวรถ ประทับใจทบทวนลดค่าจ้าง ชูเลิกวิ่ง ยกทีม. <https://www.banmuang.co.th/news/region/169111?fbclid=IwAR2E-oVAB-Y17vV3ya8BUMLljqih9R6ah>.

Baron, G. (2023, March 4). Grab PH to provide financial aid to family of rider who died in road mishap. PTV News. <https://ptvnews.ph/grab-ph-to-provide-financial-aid-to-family-of-rider-who-died-in-road-mishap/>.

Blackbox Research. (2022). Ride-hailing apps: Who's winning the race across Southeast Asia. <https://www.blackbox.com.sg/everyone/ride-hailing-apps-whos-winning-the-race-across-southeast-asia>

Bloomberg News. (2023, November 10). Grab delivers first-ever profit. Bangkok Post. <https://www.bangkokpost.com/business/general/2682561/grab-delivers-first-ever-profit>

Buday, C. (2024, March 15). For every peso spent on Grab, P3.42 is injected into the economy — CRC study. Center for Research and Communication. <https://cruap.asia/2024/03/15/for-every-peso-spent-on-grab-p3-42-is-injected-into-the-economy-crc-study/>

Cabalza, D. (2017, October 29). Good Samaritan Grab driver shot in back of his head by lone carjacker. Philippine Daily Inquirer. <https://newsinfo.inquirer.net/941377/good-samaritan-grab-driver-shot-dead-gerardo-maquidato-jr>.

Central Retail. (2021, December 2). CRC closes a major deal, investing 4,500 million baht to acquire stakes in Grab, ASEAN's first Decacorn. <https://www.centralretail.com/en/newsroom/news-and-activities/324/crc-closes-a-major-deal-investing-4500-million-baht-to-acquire-stakes-in-grab-asean-s-first-decacorn>

Chalermpong, S., Kato, H., Thaithatkul, P., Ratanawaraha, A., Fillone, A., Hoang-Tung, N., & Jittrapirom, P. (2022). Ride-hailing applications in Southeast Asia: A literature review. *International Journal of Sustainable Transportation*, 17(3), 298–318. <https://doi.org/10.1080/15568318.2022.2032885>.

Channel News Asia. (2014). Grab combines taxi and private hire fleets for new fare pricing. <https://www.channelnewsasia.com/news/singapore/grab-combines-taxi-and-private-hire-fleets-for-new-fare-pricing--8582028>

Chantanusornsiri, W. (2020, October 30). NSF recruits Grab drivers. Bangkok Post. <https://www.bangkokpost.com/business/2010831/nsf-recruits-grab-riders>

Cheok, J. (2018, October 22). Grab to trial its GrabExpress courier service in Singapore on Tuesday. The Strait Times. <https://www.straitstimes.com/business/companies-markets/grab-to-trial-its-grabexpress-courier-service-in-singapore-on-tuesday>.

- Chuwiruch, N. (2016, May 19). Thailand bans motorbike-hailing services Uber and Grab | AP News. AP News. <https://apnews.com/general-news-16310fbaca67400e9d46a59543930050>
- Cordon, M. (2022, January 27). Grab still tops SEA's food delivery market in 2021: report. Tech in Asia. <https://www.techinasia.com/grab-tops-southeast-asias-food-delivery-scene-report-finds>
- De Ruyter, A., & Rachmawati, R. (2020). Understanding the Working Conditions of Gig Workers and Decent Work: Evidence from Indonesia's online Ojek Riders. *Sozialpolitik Ch*, 2/2020. <https://doi.org/10.18753/2297-8224-159>
- Digital News Asia. (2014, December 1). MyTeksi launches as GrabTaxi in Bangkok and Singapore. <https://www.digitalnewsasia.com/sizzle-fizzle/myteksi-launches-as-grabtaxi-in-bangkok-and-singapore>
- F&B Report. (2019, April 22). Survey: GrabFood is Filipinos' preferred online food delivery platform. <https://fnbreport.ph/10295/survey-grabfood-is-filipinos-preferred-online-food-delivery-platform/>.
- Fairwork. (2022). TOWARDS FAIR LABOR CONDITIONS IN THE PHILIPPINE PLATFORM ECONOMY Philippines Ratings 2022. <https://fair.work/wp-content/uploads/sites/17/2022/08/Fairwork-PH-report-2022-EN.pdf>.
- Fullerton, J. & Jirenuwatin, R. (2019, June 21). 'Like the mafia': Bangkok's motorbike taxi drivers locked in deadly turf war. *The Guardian*. <https://www.theguardian.com/world/2019/jun/21/like-the-mafia-bangkoks-motorbike-taxi-drivers-locked-in-deadly-turf-war>.
- Garcia, A. (2023, February 17). Illegally Terminated and Suspended Grab Delivery Drivers Continue to Organize in the Philippines. *Solidarity Center*. <https://www.solidaritycenter.org/illegally-terminated-and-suspended-grab-delivery-drivers-continue-to-organize-in-the-philippines/#>
- Garcia, A. (2023, October 26). Grab Riders in Metro Manila Strike Against Unjust Fare Decrease. *Solidarity Center*. <https://www.solidaritycenter.org/grab-riders-in-metro-manila-strike-against-unjust-fare-decrease/>.
- Gomez, S. & Cecille, V. (2023, May 14). Not-so-safe delivery: Riders' trip to unsafe working conditions. *Bulatlat*. <https://www.bulatlat.org/2023/05/14/not-so-safe-delivery-riders-trip-to-unsafe-working-conditions/>.
- Grab Holdings Limited. (2021). United States Securities and Exchange Commission Form 20-F. <https://investors.grab.com/static-files/d0f042df-dbd3-4c8e-a3dd-0f548fa8a481>
- Grab Holdings Limited. (2022). United States Securities and Exchange Commission Form 20-F. <https://www.sec.gov/Archives/edgar/data/1855612/000095017023014551/ck0001855612-20221231.htm>

- Grab Philippines. (n.d.). Be a Grab driver-partner. https://www.grab.com/ph/driver/drive/?utm_campaign=GRABCOM_CTRL&utm_source=grab.com&utm_medium=referral&utm_content=Driver-Drive_PH.
- Grab Philippines. (n.d.). Consumer. <https://www.grab.com/ph/>.
- Grab Singapore. (2016, September 29). National Private Hire Vehicles Association Takes First Step In Representing Drivers Through Partnership With Grab. <https://www.grab.com/sg/press/consumers-drivers/national-private-hire-vehicles-association-takes-first-step-representing-drivers-partnership-grab/>.
- Grab Singapore. (2023, February 23). GrAB Reports Fourth quarter and full year 2022 results | GrAB SG. Grab. <https://www.grab.com/sg/press/others/grab-reports-fourth-quarter-and-full-year-2022-results/>
- Grab Singapore. (n.d.). Be a Grab driver-partner. <https://www.grab.com/sg/driver/drive/#:~:text=Earning%20incentives%20are%20updated%20weekly,a%20maximum%20of%2020.18%25%20commission.>
- Grab Thailand (แกร็บ ประเทศไทย). (2019, April 30). [{:th}แกร็บเปิดตัวฉลองยอดขายอาหารทะเล 4 ล้านออเดอร์ ใน 4 เดือนแรกของปี 2562](https://www.grab.com/th/en/press/business/%E0%B9%81%E0%B8%81%E0%B8%A3%E0%B9%87%E0%B8%9A%E0%B8%9F%E0%B8%B9%E0%B9%89%E0%B8%94%E0%B8%89%E0%B8%A5%E0%B8%AD%E0%B8%87%E0%B8%A2%E0%B8%AD%E0%B8%94%E0%B8%AA%E0%B8%B1%E0%B9%88%E0%B8%87%E0%B8%AD%E0%B8%B2/) [{:en}GrabFood celebrates 4 million orders in first 4 months of 2019](https://www.grab.com/th/en/press/business/%E0%B9%81%E0%B8%81%E0%B8%A3%E0%B9%87%E0%B8%9A%E0%B8%9F%E0%B8%B9%E0%B9%89%E0%B8%94%E0%B8%89%E0%B8%A5%E0%B8%AD%E0%B8%87%E0%B8%A2%E0%B8%AD%E0%B8%94%E0%B8%AA%E0%B8%B1%E0%B9%88%E0%B8%87%E0%B8%AD%E0%B8%B2/) [{:}](https://www.grab.com/th/en/press/business/%E0%B9%81%E0%B8%81%E0%B8%A3%E0%B9%87%E0%B8%9A%E0%B8%9F%E0%B8%B9%E0%B9%89%E0%B8%94%E0%B8%89%E0%B8%A5%E0%B8%AD%E0%B8%87%E0%B8%A2%E0%B8%AD%E0%B8%94%E0%B8%AA%E0%B8%B1%E0%B9%88%E0%B8%87%E0%B8%AD%E0%B8%B2/)
- Grab Thailand (แกร็บ ประเทศไทย). (2019, January 31). [{:th}กลุ่มเซ็นทรัล ทุ่ม 200 ล้านดอลลาร์สหรัฐ ลงทุนด้านดิจิทัลครั้งใหญ่ ในแกร็บประเทศไทย เดินหน้าสร้าง 'นิว เอ็กซ์พีเรียนซ์ อีโคโนมี'](https://www.grab.com/th/en/press/business/%E0%B8%81%E0%B8%A5%E0%B8%B8%E0%B9%88%E0%B8%A1%E0%B9%80%E0%B8%8B%E0%B9%87%E0%B8%99%E0%B8%97%E0%B8%A3%E0%B8%B1%E0%B8%A5-%E0%B8%97%E0%B8%B8%E0%B9%88%E0%B8%A1-200-%E0%B8%A5%E0%B9%89%E0%B8%B2%E0%B8%99/) [{:en}Central Group strikes landmark digital deal, investing US\\$200 million in Grab Thailand to create the new 'experience economy' for Thais](https://www.grab.com/th/en/press/business/%E0%B8%81%E0%B8%A5%E0%B8%B8%E0%B9%88%E0%B8%A1%E0%B9%80%E0%B8%8B%E0%B9%87%E0%B8%99%E0%B8%97%E0%B8%A3%E0%B8%B1%E0%B8%A5-%E0%B8%97%E0%B8%B8%E0%B9%88%E0%B8%A1-200-%E0%B8%A5%E0%B9%89%E0%B8%B2%E0%B8%99/) [{:}](https://www.grab.com/th/en/press/business/%E0%B8%81%E0%B8%A5%E0%B8%B8%E0%B9%88%E0%B8%A1%E0%B9%80%E0%B8%8B%E0%B9%87%E0%B8%99%E0%B8%97%E0%B8%A3%E0%B8%B1%E0%B8%A5-%E0%B8%97%E0%B8%B8%E0%B9%88%E0%B8%A1-200-%E0%B8%A5%E0%B9%89%E0%B8%B2%E0%B8%99/)
- Grab. (n.d.). About us. <https://www.grab.careers/en/about-us/>
- Guiao, M. A. (2023, December 12). Name Your Fare: Everything You Need to Know About New Ride-Hailing Service inDrive. Spot.ph. <https://www.spot.ph/newsfeatures/mobility/107396/indrive-new-ride-hailing-a5229-20231212?s=sr5oo48dluggng8rvkj3ls0u0g>.
- Hicks, W. (2020, September 7). Labour strikes against the algorithm. Bangkok Post. <https://www.bangkokpost.com/business/1980967/labour-strikes-against-the-algorithm>

- Ibon Foundation. (2024, September 6). NCR Family Living Wage, as of August 2024. <https://www.ibon.org/flw-ncr-2408/>.
- Icasiano, C. D. A., & Taeihagh, A. (2021). Governance of the Risks of Ridesharing in Southeast Asia: An In-Depth analysis. *Sustainability*, 13(11), 6474. <https://doi.org/10.3390/su13116474>
- Itthipongmaetee, C. (2022, November 3). Grab Fury: Unhappy Riders shut down Phetchaburi Road, execs refuse to talk. *Coconuts Bangkok*. <https://coconuts.co/bangkok/news/grab-fury-riders-shut-down-phetchaburi-road-until-execs-agree-to-talk>
- Jiao, C. (2018, May 8). Ride-Hailing Firms Are Piling Into Philippine Gridlock. *Bloomberg*. <https://www.bloomberg.com/news/articles/2018-05-07/grab-rivals-rush-into-philippine-gridlock-after-deal-with-uber>.
- Kavout. (2024, August 23). Is Grab Holdings (GRAB) Still a Key Player in Southeast Asia's Digital Economy?. <https://www.kavout.com/market-lens/is-grab-holdings-grab-still-a-key-player-in-southeast-asias-digital-economy>.
- Keeton-Olsen, D. (2018, March 26). Grab officially takes control of Uber's Southeast Asia operations. *Forbes*. <https://www.forbes.com/sites/daniellekeetonolsen/2018/03/26/grab-officially-takes-control-of-ubers-southeast-asia-operations/>
- Koh, W. T. (2023, April 17). Singapore's crowded food delivery scene could see mergers, acquisitions soon: Analysts. *Channel News Asia*. <https://www.channelnewsasia.com/singapore/food-delivery-grab-deliveroo-foodpanda-industry-analysts-consolidation-3412766>.
- Koo, A. (2021, September 21). Not Just About The Average Salary Or The Working Hours: Why You Should Care About The Salary Per Hour You Work. *Dollars & Sense*. <https://dollarsandsense.sg/not-just-average-salary-working-hours-care-salary-per-hour-work/>.
- Lee, Kah Leng (2016, January 28). MyTeksi rebrands into Grab. *The Star Online*. <https://www.thestar.com.my/tech/tech-news/2016/01/28/grab-rebranding/>
- Lee, Terrence. (2015, August 19). Tech in Asia - Connecting Asia's startup ecosystem. *Tech in Asia*. <https://www.techinasia.com/grabtaxi-raises-400m-led-china-sovereign-wealth-fund>
- Leesa-Nguansuk, S. (2018, March 27). Merger of Grab and Uber drive monopoly, pricing concerns. *Bangkok Post*. <https://www.bangkokpost.com/thailand/general/1435682/merger-of-grab-and-uber-drive-monopoly-pricing-concerns>
- Leesa-Nguansuk, S. (2022, November 15). On-demand app struggle poised to intensify in 2023. *Bangkok Post*. <https://www.bangkokpost.com/business/2437867/on-demand-app-struggle-poised-to-intensify-in-2023>

- Leesa-Nguansuk, S. (2023, May 30). Grab plans to break even by Q4. Bangkok Post. <https://www.bangkokpost.com/business/2581096/grab-plans-to-break-even-by-q>
- Leesa-Nguansuk, S. and Arunmas, P. (2020, April 1). Grab reduces commission. Bangkok Post. <https://www.bangkokpost.com/business/1891120/grab-reduces-commission>
- Lim, A. (2018, May 28). Grab launches food delivery service in Singapore as UberEats app is discontinued. The Strait Times. <https://www.straitstimes.com/singapore/transport/grab-launches-food-delivery-service-in-singapore-as-ubereats-app-is-discontinued>.
- Lim, K. & Ong, J. (2022, July 18). The Big Read: Faced with fatigue and rush to meet orders, food delivery riders grapple daily with road safety risks. Channel News Asia. <https://www.channelnewsasia.com/singapore/food-delivery-riders-road-accidents-safety-rush-orders-big-read-2815206>.
- Linkflow Capital. (2022, February 8). Payment Options for SMEs in Singapore. <https://smeloan.sg/blog/payment-options/#:~:text=GrabPay%20has%20a%20fee%20of,annual%20fees%20or%20application%20fees>.
- MarketScreener. (n.d.). Grab Holdings Limited. <https://www.marketscreener.com/quote/stock/GRAB-HOLDINGS-LIMITED-130201011/company/>
- Marquez, C. (2019, May 29). Grab driver found dead in Rizal condo. Philippine Daily Inquirer. <https://newsinfo.inquirer.net/1124568/grab-driver-found-dead-in-rizal-condo>.
- Marquez, C. (2020, May 7). Grab delivery worker dies in Pasig accident, family asks help for burial services. Philippine Daily Inquirer. <https://newsinfo.inquirer.net/1271159/motorcycle-rider-dies-in-pasig-accident>.
- Mines and Geosciences Bureau. (2024, March 11). MINING INDUSTRY STATISTICS CY 2021-2023. <https://mgb.gov.ph/attachments/article/162/MIS-Annual-2021-to-2023-as-of-11March2024.pdf>.
- Mulia, K. (2022, March 29). Building a next-generation financial institution: A conversation with Jean Fernandes, CFO of GXS Bank. KrAsia. <https://kr-asia.com/building-a-next-generation-financial-institution-a-conversation-with-jean-fernandes-cfo-of-gxs-bank>
- Munthe, B. C., & Da, B. (2016, March 22). Violence erupts as Jakarta cabbies protest ride-hailing apps. Reuters. <https://www.reuters.com/article/us-indonesia-taxis-idUSKCN0WN0YD>
- Nabila, M. (2023, January 19). Momentum Works: GrabFood Leads the “Food Delivery” Market in Southeast Asia for 3 Consecutive Years. DailySocial. https://en.dailysocial.id/post/momentum-works-grabfood-pimpin-pasar-food-delivery-di-asia-tenggara-3-tahun-berturut-turut#google_vignette

- Nation Thailand. (2022, July 27). Krungsri and Grab launch “Grab First Personal Loan” to capture retail market, focusing on Grab users. <https://www.nationthailand.com/business/40018211>
- Novianto, A. (2022, June 8). The Rise of Gig Worker Protests in Indonesia. Notes from Below. <https://notesfrombelow.org/article/rise-gig-worker-protests-indonesia>
- Novianto, A. (2023, January 19). Resistance is Possible: Life of Grab Workers in Indonesia. Asian Labor Review. <https://labourreview.org/grab-in-indonesia/>
- Porras, R., Sandrino, I., & Putong, O. (2021). Digitization of the platform exploitation: Study on the platform workers in the gig economy in PH. https://digitaljustice.cp-union.com/publications/2021/12/15/Thematic-Case-Study-Digitization-of-Exploitation?fbclid=IwY2xjawFMGnxleHRuA2FlbQIxMQABHXCEalPevvfVnrKb_kgCa8JkbusGKJz9d3VwNmUCNd31Tqct4rubAErsuQ_aem_TypdvMGM3ftKue7wuGyWXw
- Prasetiya Mulya Executive Learning Institute. (n.d.). Reasons for Start Ups to “Burn Money” for Business Operations. <https://prasmul-eli.co/en/articles/Alasan-Start-Up-Harus-Bakar-Uang-untuk-Operasional-Bisnisnya#:~:text=The%20term%20burn%20money%20is,get%20a%20red%20report%20card.>
- Rappler.com. (2018, June 27). GrabFood now on soft launch in the Philippines. Rappler. <https://www.rappler.com/technology/205888-grabfood-philippines-soft-launch/>.
- Reuters. (2020, December 4). Singapore picks Grab, Ant Group, others for four digital banking licenses. CNBC. <https://www.cnbc.com/2020/12/04/singapore-picks-grab-ant-group-others-for-digital-banking-licenses.html>.
- Reuters. (2021, October 4). Grab to take majority stake in Indonesia e-wallet OVO. Reuters. <https://www.reuters.com/business/grab-take-majority-stake-indonesias-ovo-2021-10-04/>
- Rivas, R. (2022, February 28). Grab’s new competition: JoyRide joins car ride-hailing space. Rappler. <https://www.rappler.com/business/joyride-joins-car-ride-hailing-space/>
- Rocket Media Lab. (2021, September 23). ไรเดอร์ไทย เป็นอยู่ยังไง อยากได้อะไรบ้าง. https://rocketmedialab-co.translate.google/rider/?_x_tr_sl=th&_x_tr_tl=en&_x_tr_hl=en&_x_tr_pto=sc
- Russell, J. (2014, December 5). SoftBank Invests \$250M In GrabTaxi, Uber’s Archrival In Southeast Asia. TechCrunch. <https://techcrunch.com/2014/12/03/softbank-invests-250m-in-grabtaxi-ubers-archrival-in-southeast-asia/>
- Samejaidee, T. & Hicks, W. (2020, August 11). Grab rule rollback appeases riders. Bangkok Post. <https://www.bangkokpost.com/business/general/1966015/grab-rule-rollback-appeases-riders>

- Sheng, C. (2022, April 10). Gojek vs Grab Market Share Report 2022 Q1: Ride-hailing. Measurable AI. <https://blog.measurable.ai/2022/04/10/gojek-vs-grab-ridehailing-market-share-report-2022-ridesharing-indonesia-singapore/>.
- Sheng, C. (2023, January 18). Grab vs Bolt: Ride-hailing Market Share in Thailand | Data Insights - Measurable AI. Measurable AI. <https://blog.measurable.ai/2022/05/30/grab-vs-bolt-thailand-ride-hailing-market-share-in-thailand/>
- SmartCity Kitchens. (2022, February 25). The Best Food Delivery Platform For Your Business in Singapore. [https://www.smartcitykitchens.com/blog/best-food-delivery-platform-singapore/#:~:text=GrabFood%20also%20provides%20an%20easy,sometime%20it%20will%20surge%20too.&text=Fees%3A,\(Subject%20to%207%25%20GST\)](https://www.smartcitykitchens.com/blog/best-food-delivery-platform-singapore/#:~:text=GrabFood%20also%20provides%20an%20easy,sometime%20it%20will%20surge%20too.&text=Fees%3A,(Subject%20to%207%25%20GST))
- Sri, D. (2021, December 17). Grab, Gojek, others get low score on fair work index in Indonesia: report. Tech in Asia. <https://www.techinasia.com/grab-gojek-fail-deliver-fair-pay-gig-workers-indonesia-report>
- Taylor, M. (2019, September 7). Ride-sharing services to be legal in Thailand by 2020. Thaiger. <https://thethaiger.com/news/national/ride-sharing-services-to-be-legal-in-thailand-by-2020>
- Techsauce. (2019, October 8). Grab introduces the first GrabKitchen to Bangkok to empower GrabFood ecosystem. <https://techsauce.co/en/news/grabkitchen-in-bkk>
- Teerakowitkajorn, K. (2023, March 26). Stories from Below: Organic Leaders and Dilemmas of Grassroots Organizing in Thailand. Asian Labor Review. <https://labourreview.org/grab-thailand/>
- Thai PBSWorld. (2022, November 3). Thailand: Grab riders protest against new company rules that result to reduced earnings. <https://world.thaipbs.or.th/detail/grab-delivery-service-riders-protest-against-allegedly-unfair-rule-changes/>
- Thaiger. (2018, November 8). Grab and illegal tuk-tuks killing Chiang Mai rental company. <https://thethaiger.com/news/chiang-mai/grab-and-illegal-tuk-tuks-killing-chiang-mai-rental-company>
- The Business Times. (2016, November 29). Grab launches GrabPay Credits. <https://www.businesstimes.com.sg/companies-markets/transport-logistics/grab-launches-grabpay-credits>
- Timmerman, A. (2021, December 2). Grab and GoTo IPOs have one little problem: angry gig workers. Rest of World. <https://restofworld.org/2021/southeast-asias-ride-hailing-unicorns-have-an-angry-worker-problem/>
- TODAY. (2015, December 1). LTA issues registration certificates to Grab Taxi, Hailo Singapore. <https://www.todayonline.com/singapore/lta-issues-registration-certificates-grab-taxi-hailo-singapore>

- Tortermvasana, K. (2023, March 10). Grab unit upbeat on potential for growth. Bangkok Post. <https://www.bangkokpost.com/business/2524444/grab-unit-upbeat-on-potential-for-growth>
- UA&P. (n.d.). UA&P study shows how Grab Philippines drives economic growth. <https://uap.asia/news/uap-study-shows-how-grab-philippines-drives-economic-growth/#:~:text=The%20study%20found%20that%20consumer,contributor%20to%20the%20national%20economy.>
- Voon, V. (2021, January 12). Food delivery in South East Asia almost tripled in 2020, accelerated by COVID-19. The Lowdown by Momentum Works. <https://thelowdown.momentum.asia/food-delivery-in-south-east-asia-almost-tripled-in-2020-accelerated-by-covid-19/>
- World Economic Forum. (2015). Expanding Participation and Boosting Growth: The Infrastructure Needs of the Digital Economy. https://www3.weforum.org/docs/WEFUSA_DigitalInfrastructure_Report2015.pdf.
- Yip, C. & Grosse, S. (2023, March 25). ‘Good money’ at first, then ‘a bit stagnant’: Food delivery riders square up to realities as they eye a better gig. Channel News Asia. <https://www.channelnewsasia.com/cna-insider/decent-wages-income-gig-economy-food-delivery-riders-3371381>.



#275 Horeb House, St. Andrew's Theological Seminary,
E. Rodriguez Sr. Avenue, Barangay Kalusugan,
Quezon City, Philippines, 1112



+63-2-79054912



secretariat@aprnet.org



aprnet.org

Follow us

