

# **Ordinary Exam, Spring 2026**

Managing Communication, Marketing and Relations

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# Contents

<b>Introduction &amp; Case</b>	<b>2</b>
<b>Methods &amp; Data</b>	<b>3</b>
<b>Analysis</b>	<b>3</b>
Q1: Communication, reputation and stakeholder relations in digital media environments . . .	3
Q2: Digital marketing, data and value creation . . . . .	6
Q3: Business-society relations, responsibility and crisis in a digital age . . . . .	9
<b>Discussion</b>	<b>12</b>
<b>Conclusion</b>	<b>14</b>
<b>References</b>	<b>15</b>

## Introduction & Case

Bolt is an Estonian unicorn company that started out as a ride-sharing company, but now has grown into “first European mobility super-app” (Bolt, 2026b). This means that not only do they provide taxi services, but also micromobility rental, food and grocery delivery and car-sharing services (Bolt, 2026b).

Bolt, founded in 2013 by Markus Villig, was launched in Estonia, and only a year later expanded to Latvia, Lithuania, Georgia and Czechia. In 2016, Bolt launched operations on the African continent: in South Africa, Nigeria and Kenya. In 2019, Bolt launched food delivery service Bolt Food and in 2021, Bolt launched car-sharing service Bolt Drive and grocery delivery product Bolt Market. (Bolt, 2026c)

Bolt was chosen as it has succeeded in capturing new marketing realities. Indeed, Bolt has captured all three main transformative forces, established also by Kotler et al. in their book *Marketing management*. These are technology, globalisation and social responsibility (Kotler et al., 2016, p. 11). Bolt has observed and utilised the rapid pace of possessing mobile phones, access to internet, digitalisation and optimisation of services. Bolt has been rapidly expanding to different countries, currently operating in over 50 countries and 850 cities (Bolt, 2026a). Bolt has embraced social responsibility in mission of “making cities for people, not cars”, meaning they actively engage in reducing private car use and offering shared mobility options that are more efficient, accessible, and sustainable, thereby freeing up urban space, lowering emissions, and giving people back their time, money, and streets (Bolt, 2026a).

Since its inception, Bolt has operated as a digitally driven company whose business model is closely connected to communication and marketing activities. Its success depends heavily on building lasting customer relationships and maintaining a trusted brand image. Therefore, Bolt represents a highly relevant case in the context of this course and the present exam. The following section outlines the methodology, after which the analysis and discussion are presented. The paper concludes with a brief summary.

## Methods & Data

The case is investigated as a case study. It enables an in-depth analysis of specific phenomena within its real-life context (Yin, 2014). The case of Bolt was chosen because it fits well into the course to examine its communication, marketing and business-society relations and is active in global and digital spheres.

The empirical material is exclusively secondary and publicly available. It comprises three types of sources. Firstly, Bolt's own communication, such as corporate website, blog, reports, brand campaigns, and the company's X account are used. Secondly, interviews with Bolt's founder Markus Villig and Bolt staff in podcasts are considered. Thirdly, journalism in English and Estonian are used to get more neutral perspective other than Bolt-produced narratives. Bolt-produced sources are read critically rather than at face value, as the analysis itself examines the gap between Bolt's strategic communication and its operational reality. The principal limitations are the absence of primary data, no access to internal Bolt communications, and the impossibility of capturing driver and rider perspectives directly; these are partially mitigated through journalism and online conversation examination.

## Analysis

The analysis is structured into three sections, following the questions asked in the exam assignment. The first analysis section addresses the first question of how communication is managed, contested, and interpreted within the case. Then, the analysis specifically addresses how digital media and data shape case Bolt's marketing logic, customer relations, value creation, and brand experience. The final section of the analysis addresses Bolt and drivers relations under pressure and analyses the wider organisation's business-society relations.

### **Q1: Communication, reputation and stakeholder relations in digital media environments**

For Bolt, communication is of utmost importance. As Cornelissen in *Corporate Communication: A Guide to Theory and Practice* notes, "contemporary organizations increasingly realize that they need to communicate with their stakeholders to develop and protect their reputations" (Cornelissen, 2020,

p. 99). This is especially true for (multi-sided) platforms, such as Bolt, where organisational success depends not only on one stakeholder group, but coexistence of many such groups. In particular, big platforms, like Bolt, generally have to employ much more openly and willingly “stakeholder model of strategic management” (Cornelissen, 2020, p. 102) than other non-platform companies, because they are under much bigger scrutiny based on various reasons, such as scale and bigness of these platforms, their importance and role in society and dark sides of their operations (Weiss-Blatt, 2021).

Bolt cleverly applies “stakeholder model of strategic management” to separate stakeholder groups. This can be seen their vastly different approaches and strategies with different stakeholders, such as riders, drivers, politicians, investors and trade associations for to bring different stakeholders in line with Bolt’s desired reputational brand image (Cornelissen, 2020, p. 153).

Grunig and Grunig in paper “Models of Public Relations and Communication” classify public relations communication into 4 models based on 2 axis: one-way or two-way and asymmetrical or symmetrical. These 4 models more specifically are the press agency, the public information model, two-way asymmetrical model and two-way symmetrical model (Grunig & Grunig, 1992, p. 312). They respectively serve purpose of propaganda, dissemination of information, persuasion and understanding (Grunig & Grunig, 1992, p. 288). While the paper argues that normatively two-way symmetrical model is the north star to follow, different context require different modes of operations (Grunig & Grunig, 1992, p. 307). Bolt itself employs different ways for different contexts. Table 1 showcases situations where Bolt has opted to one of the models. It is worth keeping in mind that assignments are illustrative and in practice the boundaries between models are fluid and several activities could be argued to belong to more than one category (Grunig & Grunig, 1992, p. 311).

When it comes down to message style, they have focused a lot on rational message style for targeting riders and drivers, such as “the ride costs x euros” or “drive with Bolt and earn x euros per month” (Turundajate Liit [TULI], 2023b). However, they also use other message styles, such as appeals to emotion, like their Polish ad campaign of “Mrs. Uber Drives a Bolt”, where Bolt brand ambassador and customer with last name “Uber” is used to distinguish itself from Bolt’s rival Uber (Kolacz, 2019).

While these ads (whether online or physical) are mostly asymmetric public information campaigns, of course Bolt also engages with respective stakeholder groups. For example, Bolt has realised that Bolt drivers are fundamental, constitutive or in the language of stakeholder salience, definitive (Mitchell et al., 1997), as Bolt drivers are not only customers in the strict sense that Bolt offers services, but are,

	<b>Press agency</b>	<b>Public information</b>	<b>Two-way asymmetric</b>	<b>Two-way symmetric</b>
<b>Bolt example</b>	Polish UOKiK alleges Bolt’s “Project Zero” and “100% renewable energy” slogans imply environmental neutrality, while most rides remain ICE-powered and renewable claims rely on offset certificates. Persuasive and image-oriented, with limited transparency. (Office of Competition and Consumer Protection (UOKiK), 2026)	Bolt 7 scooter announcement: factual disclosure of on-screen safety instructions and AI-assisted riding support, with no persuasion intent or feedback channel. (Bolt, 2026e; Delfi Ärileht, 2025)	“Riding Is The New Driving” campaign promoting shared mobility. Persuasive messaging informed by Bolt’s research with over 200,000 customers, where input gives framing rather than revising Bolt’s strategic position. (Bolt, 2024b, p. 19; Bolt, 2025a)	Driver engagement: forums, summits, surveys of over 40,000 drivers in 25 countries, CEO meetings with drivers. Bolt frames the relationship as dialogue and mutual adaptation. (Bolt, 2024b, pp. 2–3, 15–16)

Table 1: Bolt’s communication mapped onto four PR models

according to Bolt’s CEO Markus Villig, “number one metric [...] whether ride hailing is going to be successful in [a particular market]” or that “number of drivers” account to 80% of the value of the platform (The Generalist Podcast, 2026). For example, Bolt CEO Markus Villig “regularly meet[s] with drivers” and Bolt is “happy to let the drivers who use Bolt speak for themselves and routinely arrange forums” (Bolt, 2024b, p. 2). This indicates that they are employing two-way symmetric communication strategies as well (see also table 1) (Grunig & Grunig, 1992).

Symbolic association message style has also been considered increasingly within Bolt, where they want to turn away showcasing just numbers and focus on their larger mission (TULI, 2023b). For example, Bolt employed symbolic association message style in their London Underground campaign, where they tried to get attention by “strange and eye-catching letters like Ä and Ö”, trying to associate and draw attention to Bolt’s Estonian roots (Postimees, 2020b). This incorporates and mimics actually the style of the global marketing heavy-weight, IKEA, which itself has ran campaigns on Swedish language with “hej” (“hello” in English) and IKEA’s heavy associations with Sweden (most prominent for example the colours of the logo).

However, it is important to keep in mind and not make a mistake and assume that these stake-

holders and relations are static. Rather, with new technologies and media, which in certain contexts democratises all kinds of communication (Luoma-aho & Vos, 2010, p. 324; Cornelissen, 2020, p. 71; Curran, 2012), organisations are no longer in the centre of communication, but rather these are now issues and topics (Luoma-aho & Vos, 2010, p. 316).

Therefore, as Bolt is an organisation with different people having interest or stake in it, communication expertise has to work across functional silos, such as between the marketing, communications and customer feedback departments (TULI, 2025b). For example, Bolt does not have a great reputation in managing global feedback, yet they strive to learn from their mistakes, have close cooperation across departments and “carefully monitor the reasons why customer support is contacted and consider whether it is a product issue or, for example, a communication or marketing issue” (TULI, 2025b).

Taken all together, Bolt’s communication is diverse and multi-modal: it spans Grunig and Grunig’s four PR models, deploys rational, emotional and symbolic message styles, and recognises the dynamic, issue-driven character of contemporary stakeholder environments (Luoma-aho & Vos, 2010). Yet the sophistication of the apparatus does not by itself resolve the question of whether communication produces shared understanding or whether it primarily serves to manage stakeholders — this is ensued in following sections.

## **Q2: Digital marketing, data and value creation**

Shifting the focus from broad communication to digital marketing specifically, Bolt demonstrates how a global digital company approaches modern marketing strategies in a highly systematic and data-driven manner. In the early stages of entering a new market, Bolt combines public relations and launch media with paid online advertising in order to attract the first customers and drivers. According to Bolt’s founder, the most effective channels for this initial acquisition phase were Instagram and Facebook ads (20VC with Harry Stebbings, 2026). However, Bolt also emphasises that paid marketing only serves as an initial catalyst. In mature markets, approximately 80% of growth is driven organically through word-of-mouth, while paid acquisition represents only around 20% of demand generation (20VC with Harry Stebbings, 2026). This highlights the importance of creating a strong customer experience and value proposition, as sustained growth depends on customer retention and positive network effects rather than advertising alone.

Before launching in new markets, Bolt relies heavily on data analysis and market evaluation. Rather than expanding randomly, the company developed what Villig has described “a very simple model” in

which they ranked the top 200 cities globally according to criteria such as population size, regulation, car ownership rates, and driver availability (20VC with Harry Stebbings, 2026). Interestingly, many African cities ranked at the top of this analysis, with Johannesburg emerging as the most attractive opportunity. Instead of committing in Johannesburg to expensive mergers, acquisitions, or large-scale foreign direct investments, Bolt first tested market demand through low-cost digital advertising campaigns targeted at both customers and drivers. By analysing metrics such as sign-up rates and customer acquisition costs, the company could identify which cities demonstrated the strongest traction before physically entering the market (20VC with Harry Stebbings, 2026). This approach significantly reduced expansion risk while enabling rapid international scaling. This tactical approach by Bolt showcases why Bolt is master in digital marketing – they used digital technology to test the market in an another country, thing that a lot “more [other] companies do not do”, in a way that both information or interaction aspects of digital technology were used (Kotler et al., 2016, pp. 116, 120–121; 20VC with Harry Stebbings, 2026).

Data therefore plays a central role in Bolt’s value creation process. The company continuously refines what it refers to as a repeatable “playbook” for entering and scaling markets (Wise, 2026). Bolt systematically monitors user behaviour, acquisition efficiency, and marketplace liquidity in order to optimise operations and improve profitability over time. The platform’s business model is strongly based on network effects, where increased driver supply improves customer experience, which in turn attracts more users and generates further growth (Osterwalder & Pigneur, 2010, pp. 77–78).

On top of that, Bolt has defined clear metrics for evaluating business success and value creation. The company’s primary performance indicator is “number of gross bookings”, referring to “how much actual monetary volume of transactions is happening on the platform” (20VC with Harry Stebbings, 2026). Bolt argues that this metric captures the overall health of the ecosystem because higher transaction volume reflects customer retention, increased ride frequency, successful referrals, and marketplace growth simultaneously (20VC with Harry Stebbings, 2026).

Moving on from launching logic of numerical performance marketing, Bolt has started to think increasingly on building a coherent brand experience, since they “operate in an industry where [...] competitors have a similar product and the brand is the biggest differentiator to focus on” (TULI, 2023c). According to Maksymilian Malicki, the Head of Brand at Bolt, “it is natural for startups to initially focus on performance marketing and then realize that this is not the only way to grow” (TULI, 2023c).

This at first entailed setting their focus across business lines and defining their mission more concretely, as mentioned, it is “making cities for people, not cars” and then communicating messages related to it (TULI, 2023a). For example, one brand campaign they had carried out in 2023 was developing a merch collection and selling it in Bolt Market; collection included various accessories, such chess sets and jump ropes that would help unlock the potential of the streets for people. Their message was “that our streets are for much more than just parking cars” (TULI, 2023a).

Recently, just a year ago, the Bolt brand underwent a refresh, which was developed and carried out internally, without the involvement of an external agency (TULI, 2025a). They aimed to create a cleaner and more unified visual identity that better reflected the company’s rapid international growth and long-term ambitions. The refresh introduced a darker shade of Bolt’s signature green to improve consistency, readability, and accessibility across both digital and physical touchpoints, including vehicles, courier equipment, the mobile application, and advertising materials. (TULI, 2025a)

Additionally, the company transitioned from 2D to 3D illustrations, producing more than 400 new animated assets to create a more dynamic and engaging user experience. Bolt also replaced its previous Euclid typeface with Inter, an open-source font supported by Google, allowing for improved readability and scalability across the more than 50 countries and hundreds of languages in which the company operates. Beyond the visual redesign, Bolt introduced a new sonic identity called “Qui,” inspired by the sounds of urban environments such as birdsong, conversations, engines, and car signals. This altogether means that Bolt has invested and thought through a lot of details many other companies do not do — namely, both Bolt’s digital and physical brand experience, so that across all customer touchpoints experience is smooth and consistent (Kotler et al., 2016, p. 462). (TULI, 2025a)

Whether it is more performance marketing or brand marketing inclination that Bolt deploys, or whether marketing is born from creativity or a data-driven approach, Bolt employs a broad mix of different strategies and communication channels. While their own channels are in the first place as there they have own large customer base to target, they deploy Meta, Google, Snapchat as well as TikTok. TikTok is particularly successful, because with Bolt Food, they can promote appetizing products for which the likelihood that people will respond when they are hungry is pretty high. (TULI, 2025b)

### **Q3: Business-society relations, responsibility and crisis in a digital age**

Bolt's relationship with society has had its ups and downs. As Bolt is navigating waters that are one hand politically controversial and on other hand economically unsure, it has acted and made some decision that have faced some backlash. One might even classify Bolt as Estonian Big Tech and thus call Bolt part of Estonian Techlash (Top101.ee, 2021; Weiss-Blatt, 2021). While Bolt has had many issues with different stakeholder groups, in this section, I am mostly focusing on the driver-related tension underlying the classification of gig worker vs employee and driver conditions.

Since the very beginning, Bolt has generally treated drivers as self-employed independents or gig-workers, rather than employees. This effectively means they do not receive the benefits typically provided to employees, such as health insurance, paid leave, or reimbursement benefits. However, it is also important to keep in mind that Bolt does provide work, directly and indirectly, to 1% of the Estonian population (Postimees, 2020a), and being part of Estonian Big Tech (Top101.ee, 2021), there is increased media attention or discussion around it, whether positive or negative.

In one extreme, the negative extreme, Bolt's drivers can be treated or considered as a precariat, meaning a segment of the working class characterised by low-wage, part-time, or temporary jobs that provide little to no benefits. On the other positive extreme, the consistent message that Bolt likes to emit is that the drivers have agency. Bolt's own study has shown that drivers value flexibility the most (Bolt, 2024b, p. 3). Therefore, there is also a case to be made that they are like "flextrapeneurs", coined by Lars Dyrhagen, which means that they are entrepreneurs owning the means of production and being their own boss by having the flexibility to work and earn extra income when unemployed or underemployed (Dyrhagen, n.d.).

The most recent showdown began in September 2025 between drivers and the platform's management. Namely, in Estonia, drivers claim that higher commission, up from 20% to 25%, with fixed fares and unfair price disparities between different regions has made accepting rides net loss, when fuel, insurance, and vehicle depreciation are factored in. Bolt on their side has "defended the company's pricing logic, stating that raising prices paradoxically leads to lower earnings for drivers because price-sensitive customers stop using the service" (Postimees, 2026a). While Bolt remains open to discussions with driver representatives, protesters remain sceptical of the outcome, fearing exposure to retaliation from management. What is also noteworthy is that Estonians are not a nation inclined to protest (Postimees, 2026b) — this altogether highlights remaining tensions between the company and its main stakeholder group (Postimees, 2026a).

In a similar way, Latvian Bolt drivers have protested against Bolt's policies, with signs such as "We are not slaves," "24 hours without 'Bolt,'" "You can't do without us," and "Enough of milking us" (LSM English, 2026). Whether it is Estonian, Latvian drivers or drivers from other countries for that matter opposing Bolt's policies, this highlights growing anti-platform sentiment, which is probably not unique to only Bolt.

What Culpepper and Thelen call "platform power", is what Bolt exhibits — "platform power", which "inheres in companies of economic scale that provide the terms of access through which large numbers of consumers access goods, services, and information" (Culpepper & Thelen, 2020, p. 288). "Platform power" exerts its influence in an automatic way, namely it happens in the minds of politicians (Culpepper & Thelen, 2020, p. 293). In case of Bolt, Bolt directly has platform power and this is no secret — their own mission is to "make cities for people, not cars" (Bolt, 2026a). They build themselves to be a platform, which over time has come to be a part of the infrastructure of customers lives (Culpepper & Thelen, 2020, p. 295).

Indeed, it can be even argued that Bolt already exerts such "platform power". While Bolt exercised its instrumental power by lobbying for Estonian position on EU directive on platform work (Thangavelu et al., 2024) and was not particularly successful in the final outcome of EU directive, it can be argued that this instrumental power or Bolt's general influence on society had played its role in grand scheme of things as "platform power" is clearly showcased in that Bolt really does not seem to need to adapt to any changes at least in its home market, where it will be adopted by the end of this year in its minimal scope, not changing status of Bolt drivers or couriers (Koppel & Pott, 2026).

While the slogan of the mission is noble, fractures, as showcased by the protests of drivers, who are very sensitive to price fluctuations and dependent on platform decisions, highlight inherent tension within this goal and the system. Of course, Bolt itself notes that it strives to further the cause of drivers, as it feeds into their own success (Pott, 2025).

The issue of drivers requires however Bolt's constant attention, as decisions made ultimately affects individual drivers differently as well. Therefore, for some price disparities might be an issue, while for others not. However, as recent Estonian strike indicates, strikes in different cities and regions are inter-related as things do not happen in a vacuum and there is close communication between Bolt drivers. Therefore, complaints generally require an immediate response from Bolt.

For example, Bolt is actively engaging with the drivers (and other people for that matter) on X. This not only includes customer complaints or any other concerns, but also communicating about

their CSR (social responsibility) initiatives. Bolt employs all three Etter’s CSR communication strategies in X: broadcasting, reactive, and engagement, as showcased in the table 2 (Etter, 2014, p. 329). Bolt therefore cleverly utilises tools that are of important value not only for responding to customer complaints, but also addressing other relevant issues. This aligns with Luoma-aho and Vos’s call for “ongoing attention” for these dynamic “issue arenas” by organisations (Luoma-aho & Vos, 2010, p. 319). The relationship between Bolt and its drivers is an important one — yet, it is also a slow-burning issue potentially turning into a much-bigger crisis in a future (Cornelissen, 2020, pp. 254–255).

Table 2: Types of Bolt CSR communication on X

Dimension	Broadcasting	Reactive	Engagement
<b>Post Example</b>	“2024 was a big year for sustainability at Bolt. We became a participant in the UN Global Compact, launched the Bolt Urban Fund, published our Diversity and Inclusion Policy, and more. See our blog for the full wrap-up!” (Bolt, 2025b)	“Replying to @trinzu Bolt does not operate in Russia already for several years. After Russia invaded Ukraine, we also stopped operations in Belarus and removed all Russian products from Bolt Market. Bolt has donated more than €5M to NGOs supporting Ukraine. (1/2)” (Bolt, 2023)	“We might be able to help with the greener cities part.” Source: @BBCLondon-News (Bolt, 2024a)

## Discussion

The common thread linking all previous sections of the analysis is Bolt's relationship with their drivers. As identified, drivers are definitive stakeholder, act as network-effects engine and remain at the locus of business-society pressures.

The question that arose is why Bolt drivers appear to be undervalued in practice, even though Bolt's communication consistently seems to elevate them. Drivers face shrinking margins as Bolt raises its own commission while fuel and operating costs rise. Bolt's defence is that holding prices stable preserves rider demand, which in turn preserves driver income. However, as Bolt CEO Villig has noted, the number one metric they follow, their north star, is the "number of gross bookings". However, this measures transaction volume on the rider side, drivers appear only as the supply needed to fulfil those bookings. A marketplace, which is healthy from the rider side and unhealthy from the driver side may seem like it is doing well, but beneath the surface, their main customer segment, drivers, suffers. This data optimisation aligned with the headline metric may miss that asymmetry.

On top of that, Villig says that 80% of growth is organic word-of-mouth. On its own this signals brand strength, but if at the same time drivers are simultaneously striking, it becomes worrying. This may seem logical at first, however what the reality is that drivers are enticed to platform, they become economically dependent on it, and then have limited exit options. Indeed, Bolt's own report observes that more than half of European drivers earn above minimum wage (Bolt, 2024b, p. 3). This weakens Bolt's argument of agency and "flextrapeneurship", if livelihood of drivers depends on small margins they receive. On top of that, there is extension of the critique of platform power – not only every rider relying on Bolt's transportation (worth remembering that Bolt works to lessen private cars, so that their system can serve them), but that Bolt also subjugates drivers themselves under the Bolt's machine.

Furthermore, what is noteworthy is that while drivers are interlinked with Bolt's operations and success, Bolt seems to hide some sinister reality from their drivers. They actively claim that Bolt's role in the age of self-driving cars remains relevant for managing the fleet and connections (Bolt, 2026d; The Generalist Podcast, 2026). However, if self-driving cars were to serve their riders, then the driver role disappears — drivers constitute up to 1% of the population in some saturated markets (Postimees, 2020a; The Generalist Podcast, 2026). Investors attentive to this tension may read it as a strategic risk. Whether this reflects genuine belief or strategic positioning is unclear, but the conflict is stark

and illustrates Bolt's communication: messages are designed to manage stakeholder perceptions.

The problem, then, is not a lack of engagement. Bolt organises driver academies and forums, CEO meets with drivers personally (Bolt, 2024b, p. 2) and the company addresses concerns over social media, such as X. However, one might start questioning this engagement, if grievances, such as Estonian, Latvian or global complaints, recur one after another. Therefore, one can start suspecting the sincerity of their communications and actions in general. Persistent, well-resourced communication that does not result in structural change can itself erode trust, because stakeholders begin to read engagement as performance. This is a big risk Bolt carries into the legitimacy domain: just as network effects require a critical mass of drivers and riders to function (20VC with Harry Stebbings, 2026; The Generalist Podcast, 2026), legitimacy requires a critical mass of stakeholder trust. If driver trust erodes below that threshold, supply of drivers contracts, rider experience deteriorates, and the network logic that powered Bolt's growth begins to work in reverse.

## Conclusion

This paper analysed Bolt's communication, digital marketing, and business-society relations, with particular attention to its relationship with drivers. The analysis showed that Bolt deploys a wide repertoire of communication models, across Grunig and Grunig (1992)'s four PR models, multiple message styles, and Etter (2014)'s three CSR strategies. Bolt's digital marketing combines disciplined performance analytics with a deliberate brand-experience investment. Bolt's success is built on a data-driven platform logic in which drivers are positioned as definitive stakeholders and treated as the engine of network effects.

Yet what the case also starkly reveals is that there is a structural tension between Bolt's stated mission of "making cities for people, not cars" and the conditions experienced by the drivers on whom the platform depends. The recurring driver protests in Estonia and Latvia and Bolt's lobbying around the EU platform-work directive together suggest a pattern in which Bolt's communication leans functional precisely where their success and legitimacy stakes are highest.

The theoretical lenses applied here did different kinds of work. The issue-arena perspective was useful for explaining why drivers move in and out of organisational attention and how grievances coordinate across regions. Culpepper and Thelen (2020)'s "platform power" captured how Bolt's structural position shapes both consumer dependence and policy outcomes. Grunig and Grunig (1992)'s public relations model classification, message styles and Etter (2014)'s three CSR strategies illuminated that Bolt's communication is diverse in nature. However, the theories highlight that Bolt's customer-relationship dynamics are uneven: Bolt's relationship with riders is effective, but tends to treat drivers as a supply input rather than as relational stakeholders, precisely the blind spot this case exposes.

For Bolt, the broader implication is that communication, however targeted, clear or sophisticated, cannot indefinitely substitute for structural change. Engagement that does not address recurring concerns risks being read as performance rather than dialogue, and at sufficient scale that perception erodes the legitimacy on which the platform's network effects ultimately depend.

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