SUPER APPS AND THE MOBILITY TRANSITION (WEISS & HASSELWANDER 2025).

Dr. Daniel Weiss,

Research Group Leader „Market analysis, -design and innovation strategies“, German Aerospace Center (DLR), Institute for Transport Research

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- The Role of Super Apps in Mobility
- Business Model and Market Dynamics
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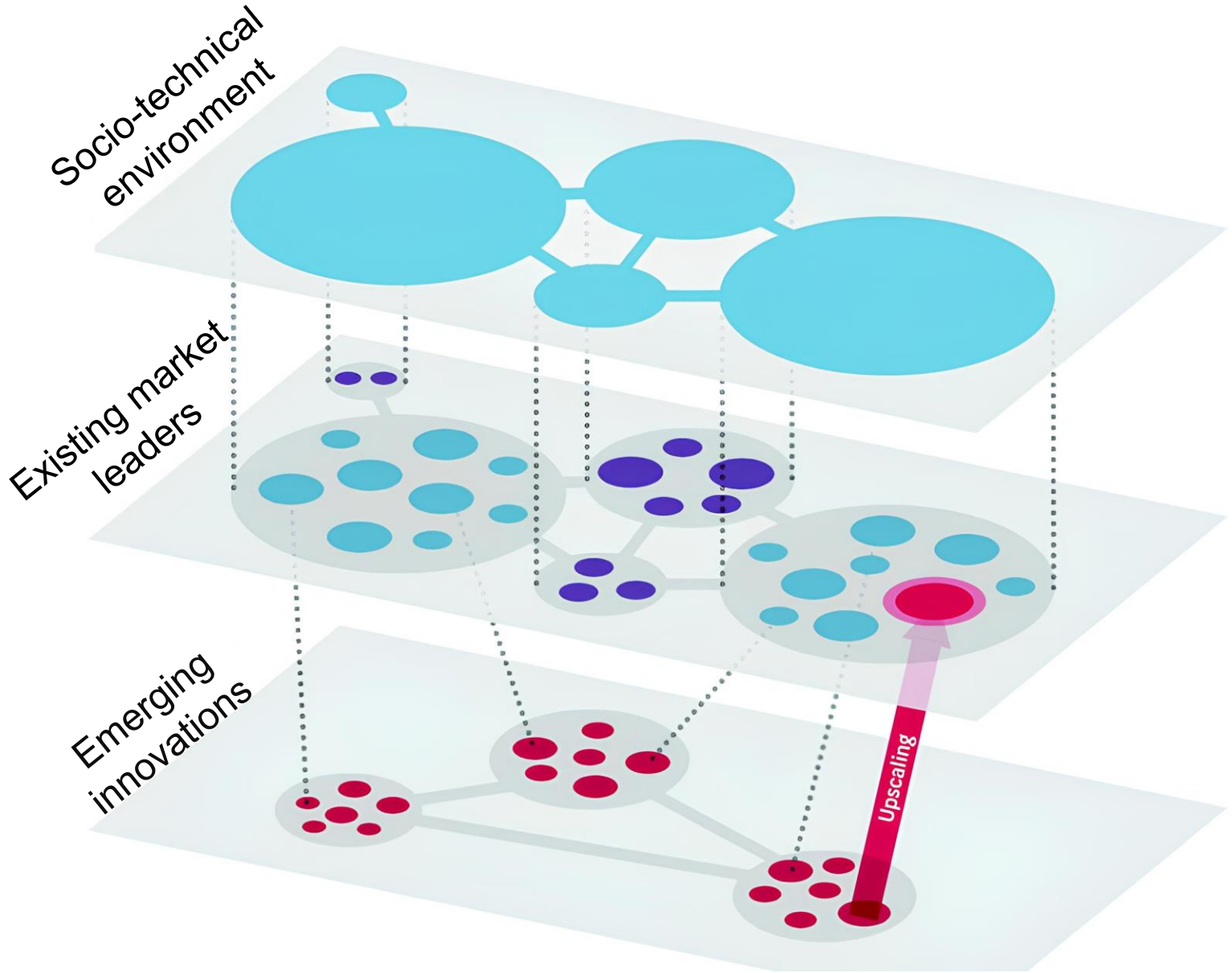
Background



Source: Garcia et al. 2020

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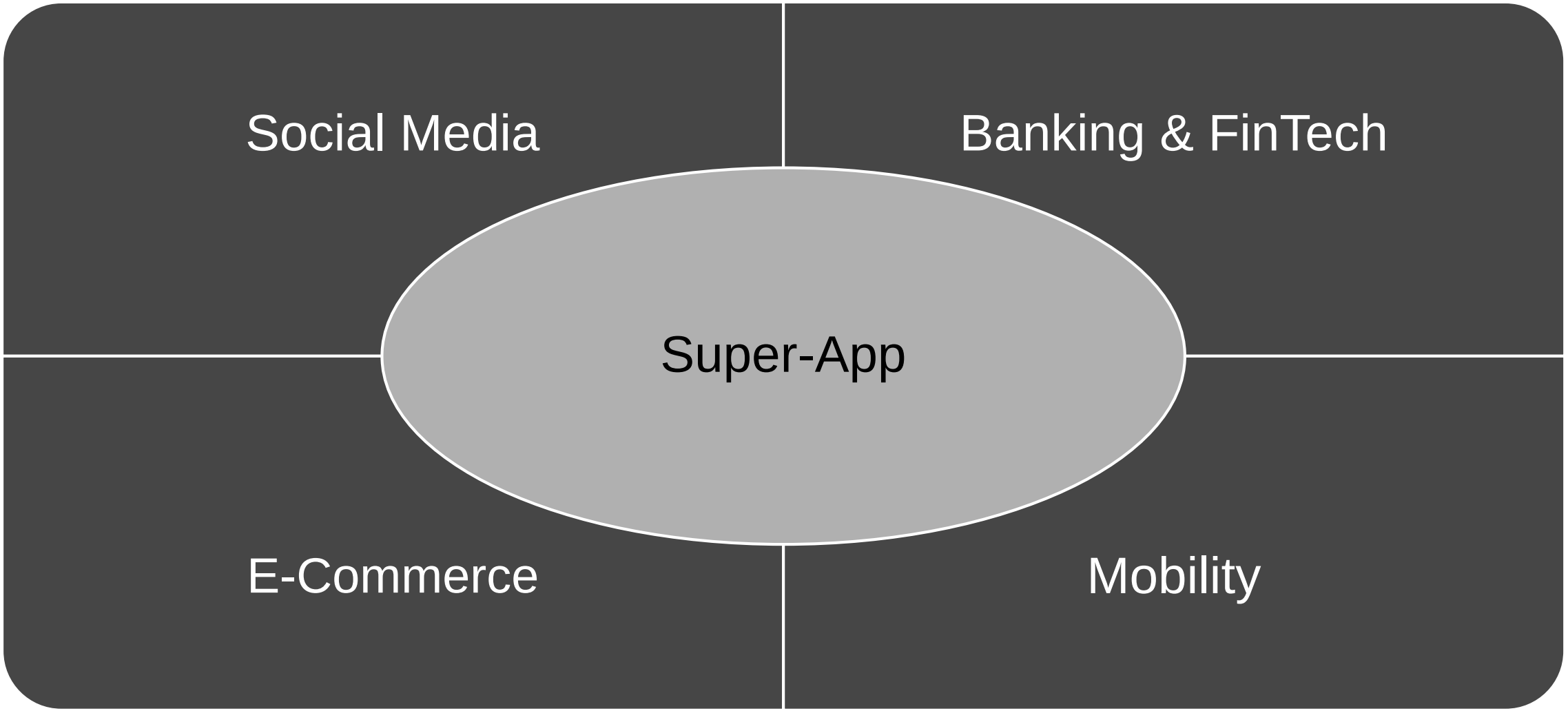
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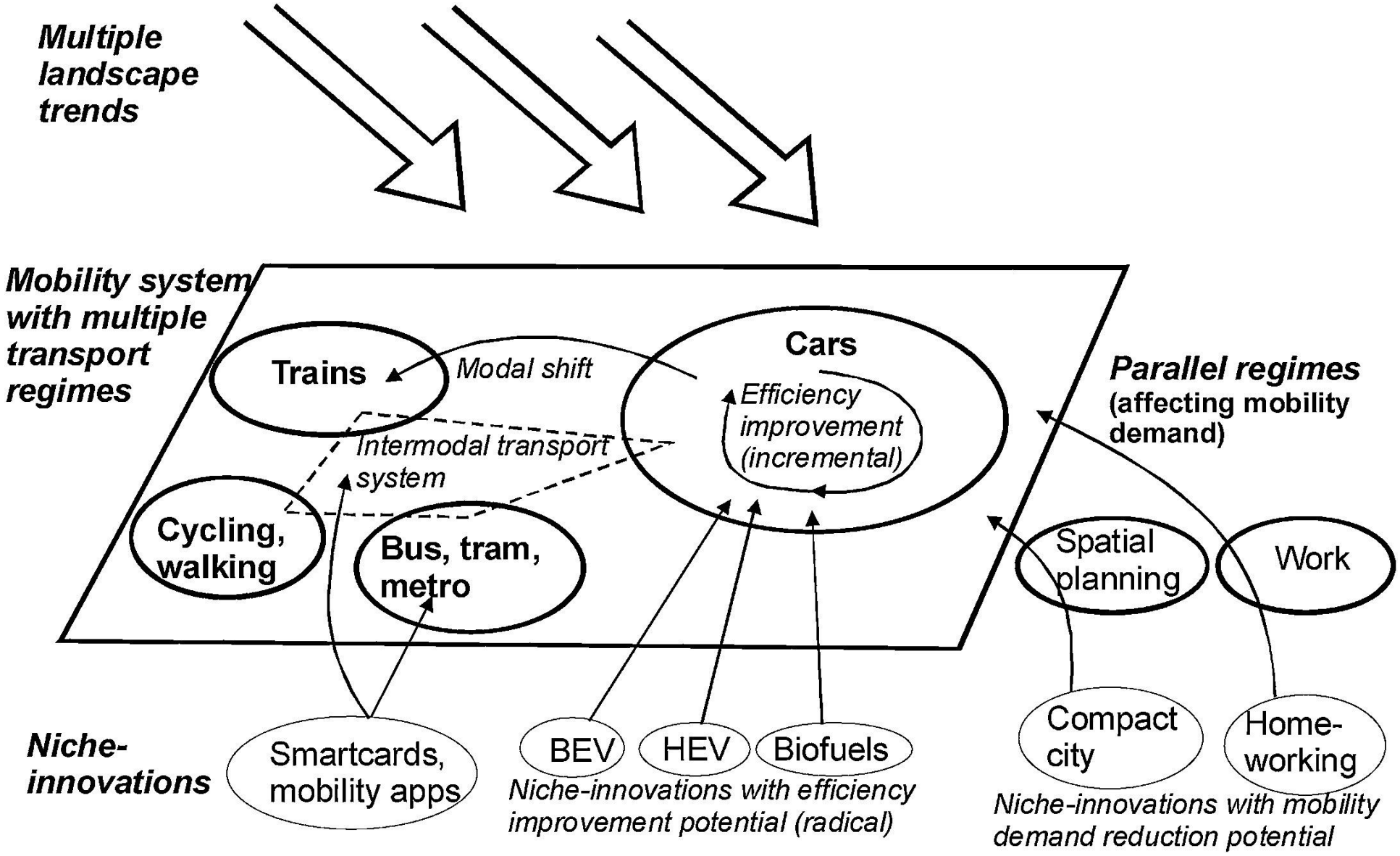
Banking & FinTech
Super-App
E-Commerce
Mobility

THE ROLE OF SUPER APPS IN MOBILITY

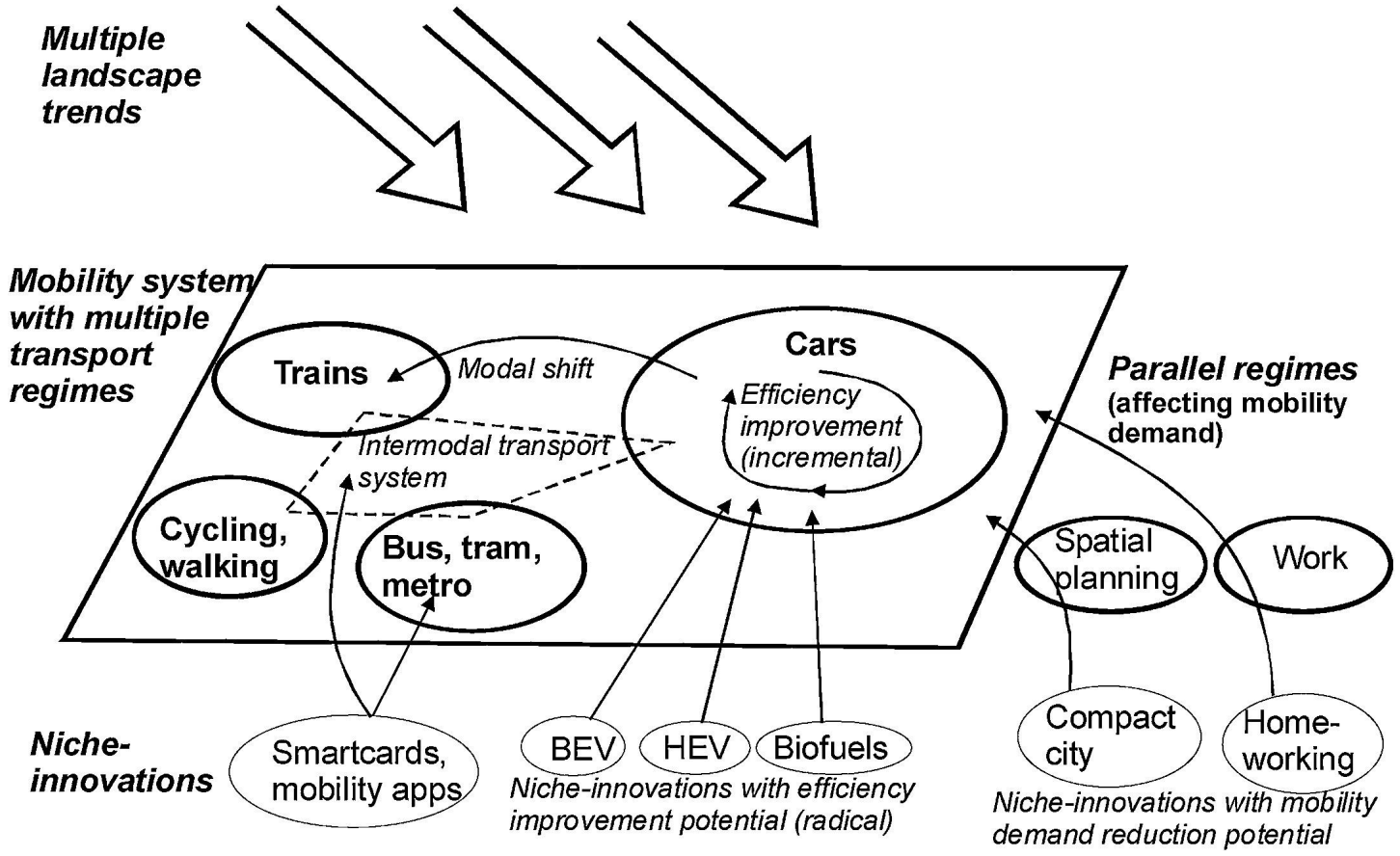
The Role of Super Apps in Mobility



Source: Geels (2018)

The Role of Super Apps in Mobility

- Super apps are entering Western markets via mobility platforms.
- Shift from **MaaS** to **Mobility-as-a-feature (MaaF)**
- Transformative potential: from ***multimodal*** to ***multi-service***



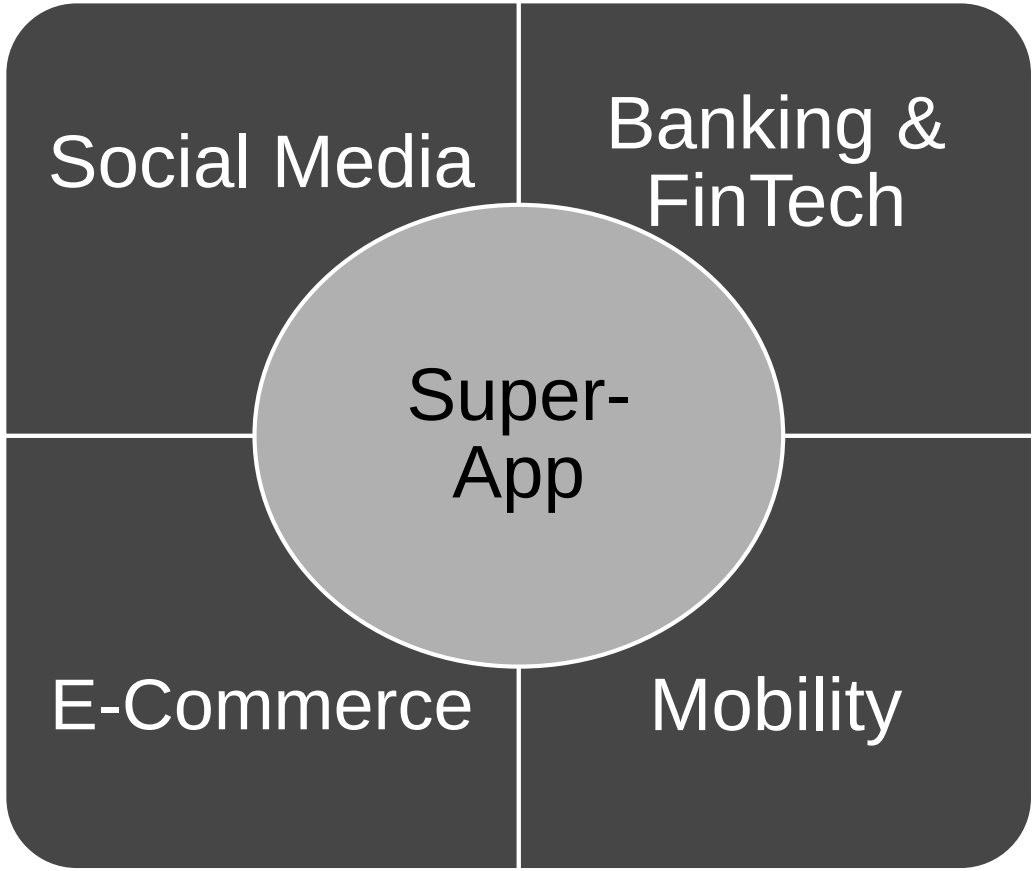
Source: Geels (2018)

BUSINESS MODEL AND MARKET DYNAMICS

Business Model and Market Dynamics

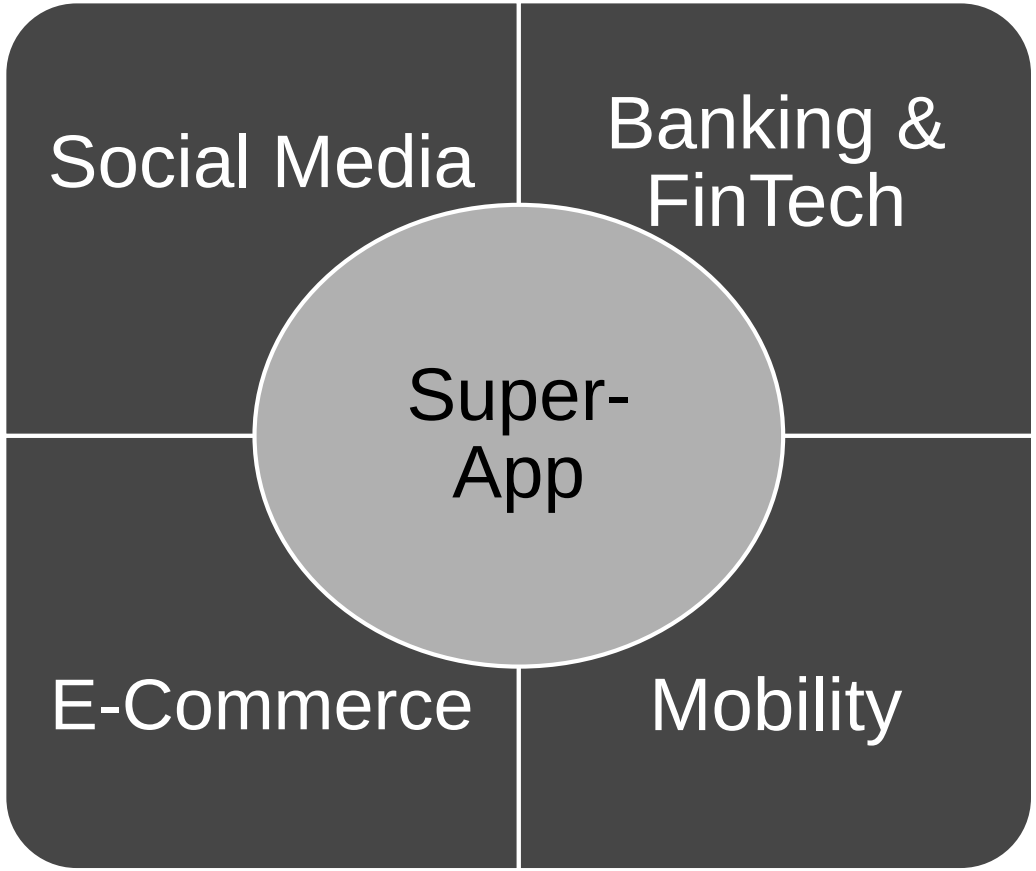
- Super apps business model: integrate **multiple services** to exploit platform growth strategies

- Companies like Uber & Bolt are expanding beyond transport

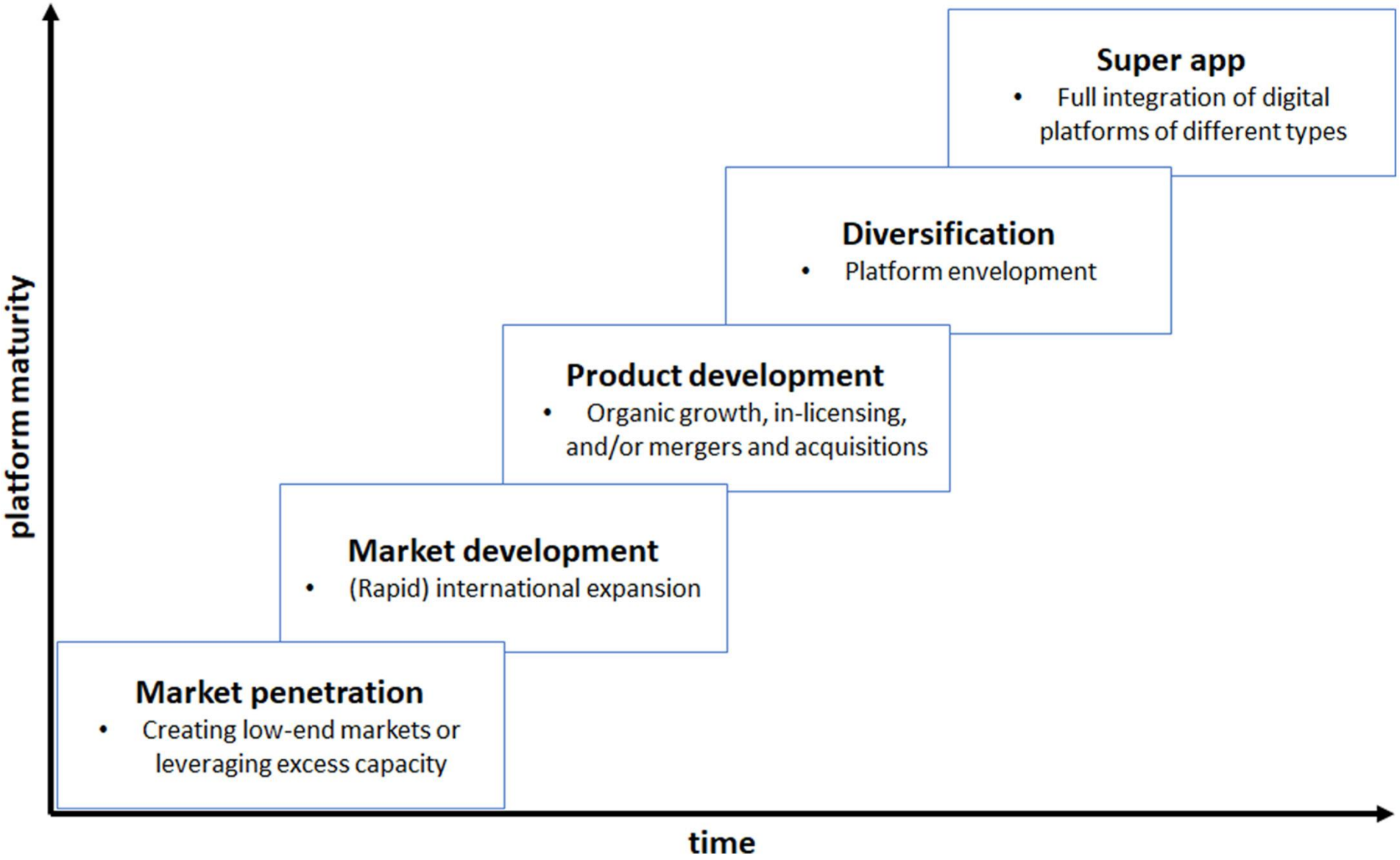


Business Model and Market Dynamics

- **Max. network and scale effects:** optimize resources, enhance user experience
  - Facilitate seamless, service-driven mobility
- Challenge traditional (pipeline) business models
  - Matthew effect
  - Winner-takes-all markets
  - Servitization
  - Lock-in effects



Business Model and Market Dynamics



Hasselwander 2024

Business Model and Market Dynamics

Overview of integrated services in selected major super apps.

	WeChat	LINE	KakaoTalk	Alipay	Revolut	Rappi	Uber	Gojek	Grab	Bolt
Year of launch	2011	2011	2010	2004	2015	2015	2009	2009	2012	2013
Customer base	1.3+B	95+M	54+M	1.2+B	45+M	30+M	150+M	38+M	38+M	200+M
Headquarters	China	Japan	South Korea	China	UK	Colombia	USA	Indonesia	Singapore	Estonia
Financial services	✓	✓	✓	★	★	✓	✓	✓	✓	
E-commerce	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Healthcare	✓	✓	✓	✓		✓				
Fitness/sports	✓			✓						
Entertainment	✓	✓	✓	✓						
Utilities	✓		✓	✓		✓		✓		
Hospitality/travel	✓		✓	✓	✓	✓			✓	
Deliveries	✓	✓	✓	✓		★	✓	✓	✓	✓
Mobility/transport	✓	✓	✓	✓		✓	★	★	★	★
Streaming	✓	✓	✓							
Mobile games	✓	✓	✓							
Social media	✓	✓	✓							
Video/voice calling	✓	✓	✓							
Instant messenger	★	★	★		✓					

★ = core service ✓= integrated service.

Note: Data based on desk research conducted in November 2024. We do not claim completeness, as the availability and range of services may vary over time and across regions.

Source: Weiss and Hasselwander (2025)

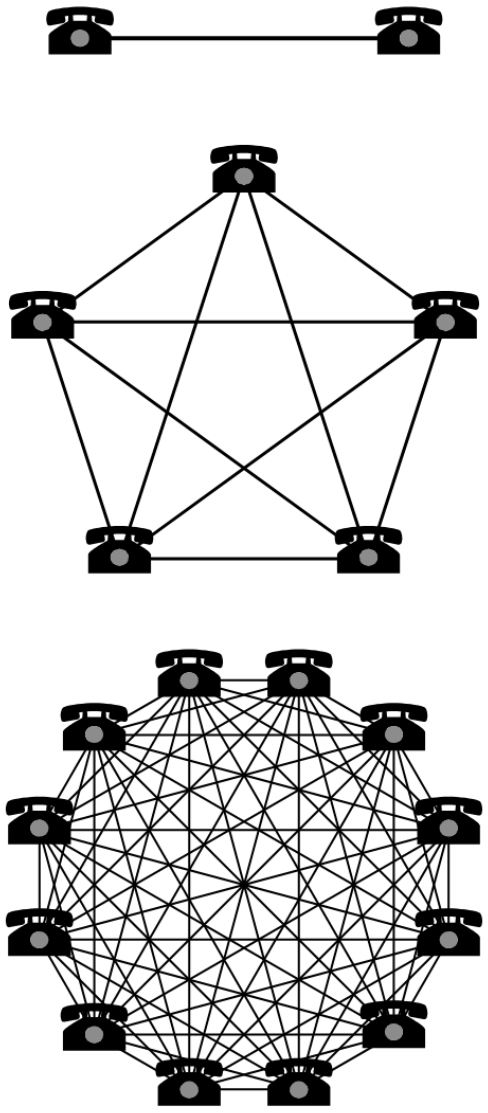
FUTURE RESEARCH AVENUES

Transition mechanisms / plattform economics

- Different **mechanisms** through which super apps interact with **established regimes and emerging niches**.

➢Which services offer the highest network and scale effects in combination with transport services?

➢How are super apps coordinating and managing interactions



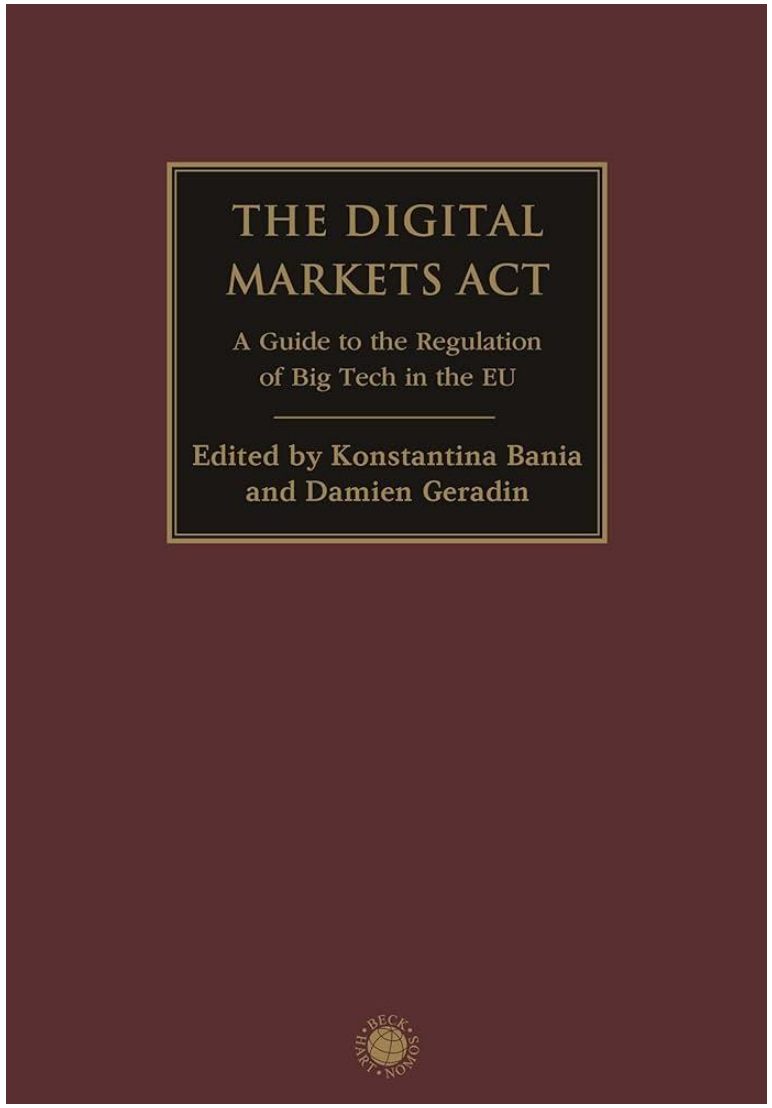
Regulation

- **Regulatory gaps** in existing frameworks (e.g., EU Digital Markets Act) as super apps pose new challenges

➢What are ‘fair’ antitrust policies?

➢What competences and data are needed in regulatory intuitions?

➢How can we coordinate local, national, and supranational regulation?

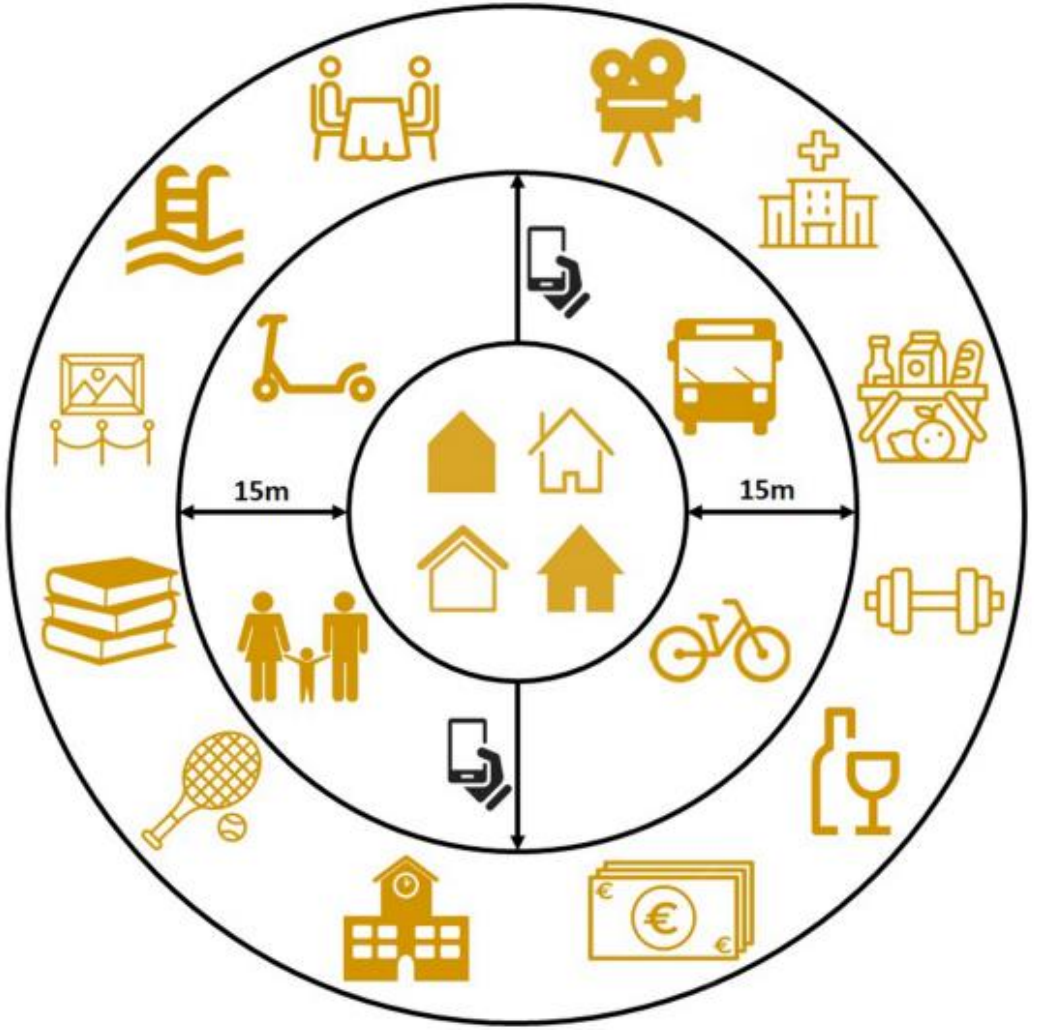


Governance

- Most super apps are privately owned, but public-private or government-led models are emerging.
- Example: **Berlin's Jelbi App**.

➢How can ***local super apps*** be co-created with communities?

➢How can ***local super apps*** consider cultural differences, and spatial context?



Source: Hasselwander et al. 2024

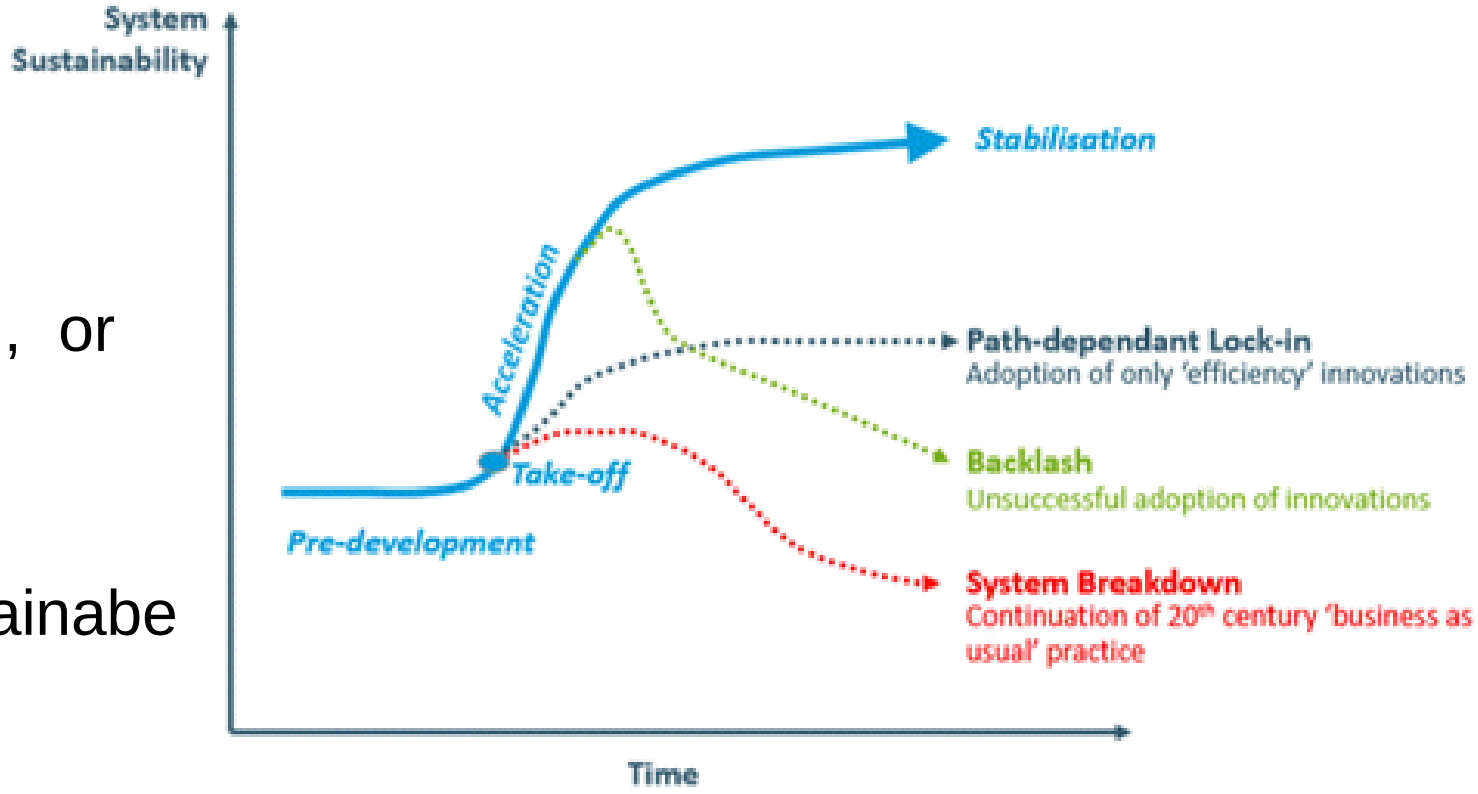
Transformation Pathways

- Super apps could disrupt **incumbent businesses** (e.g., automakers, public transport operators).

➢Coalition-building, competition, or contestation?

- Opportunities to facilitate sustainabe mobility

➢BAU or transtion towards ‚sustainable multi-service‘ mobility?

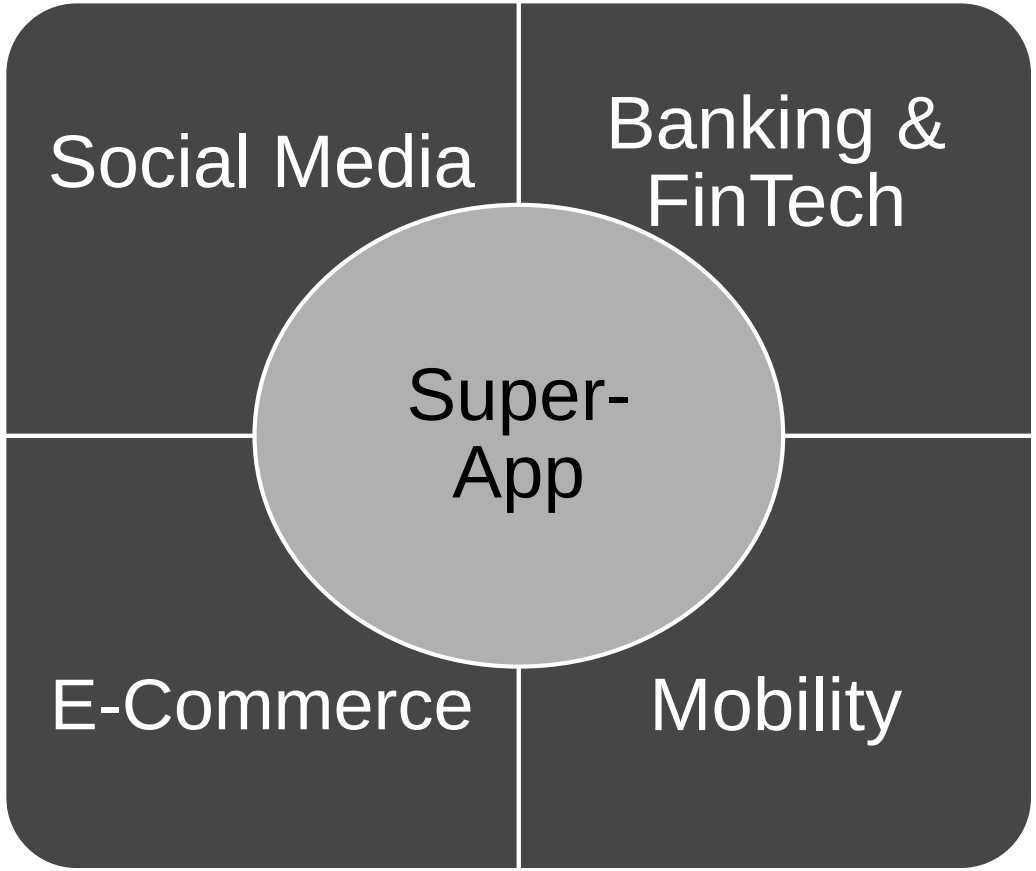


Van der Brugge and Rotmans 2007

Socio-economic impacts

- Potential **positive impacts**: Reduced travel costs, increased service efficiency, improved accessibility.

- Potential **risks**: Market concentration, degradation of work, data privacy concerns, servitization.



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DISCUSSION

THANK YOU!

Dr. rer. pol. Daniel Weiss

Research group leader „Market analysis, -design, and innovation strategies

DLR Institute for Transport Research (VF)

Daniel.weiss@dlr.de
www.dlr.de/vf