SUPER-APPIFICATION: CONGLOMERATION IN THE MOBILE ECOSYSTEM

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"Super apps" are emerging and gaining popularity worldwide, especially in Southeast Asia, India and Africa (Heath, 2021; Schumpeter, 2022). They are "do-everything apps that bring together an expansive suite of services within a single interface" (Steinberg et al., 2022) and, therefore, become "more integrated into people's lives." While the term super app can be ambiguous, reflecting industry hype and speculative investment (Pitre, 2022), it nevertheless speaks to the complexity of *conglomeration* processes occurring in the mobile ecosystem. In particular, it highlights the organisation, political economy, and geopolitics of the process of platformisation within the app economy, including how forms of platform expansion and encapsulation are culturally, geographically, and historically specific (cf. Steinberg, 2020). As such, the rise of super apps (or *super-appification*) raises questions about the geo-historical distinctiveness of their platform architectures and business models, and how they facilitate modes of capital accumulation in today's global economy.

With their capacity to merge and expand services and users within a single unified experience, emerging studies of super apps have focussed on themes of enclosure and media concentration as they intensify the "appification" of everyday life (Morris & Elkins, 2015; Morris & Murray, 2018) and take on the role of a seemingly indispensable critical infrastructure (Athique, 2019, Dieter et al., 2021). They are described in this context as "all-in-one apps" (Chen et al., 2018), "Swiss-army-style apps" (Steinberg, 2020) or

"do-everything apps" that represent "a particular model of an app that assumes most functions of the smartphone can be done within either a single app or a suite of apps" (Steinberg et al., 2022). Initial studies of super apps, moreover, have questioned the novelty associated with the term; they are not necessarily considered the "next level up for apps" but rather foreground "the dominance of some digital platform companies" (Goggin, 2021: 74). In this sense, super apps have also been understood as the outcome of specific corporate strategies, including conglomeration and financialisation (Jia et al., 2022). This might be considered with ongoing concerns around the consolidation of power by very large platform corporations, or even monopolies, and the need to protect public values and institutions (Van Dijck, 2021; Van der Vlist, 2022). Super apps, however, are uniquely viewed within this context as a particularly aggressive horizontal and locally-oriented business strategy compared to the vertical and globally-oriented strategy of US/Silicon Valley-based apps (Atkins, 2019). They are, finally, often associated with non-Western companies and can be seen as efforts to counterbalance US "platform imperialism" (Jin, 2015) in smartphone devices, software operating systems and app stores, i.e. Apple and Google.

Approach

While most of the emerging literature on super apps focuses on Chinese and Southeast-Asian apps and companies such as Tencent's WeChat—"the poster child for super apps" (Chan, 2022)—this study offers a more comprehensive understanding of the phenomenon by looking at super apps from around the world (cf. Pitre, 2022). Specifically, it examines and discusses (1) *what* "super apps" are, (2) by *whom* they were developed, (3) *when* they were created or how they evolved over time, and (4) *where*—in which countries or regions or parts of the world—they have emerged. It builds on previous app studies research projects that have developed approaches to study mobile apps and their history and evolution using app stores, web archives, and app repositories (Dieter et al., 2019; Helmond & Van der Vlist, 2021). Together, these four complementary perspectives provide an expanded understanding and discussion of the super app, not just as a particular type of app, but what we call a process of super-appification that leads to distinct *app constellations* (cf. Staykova & Damsgaard, 2016).

Varieties of Super Apps

Building on previous research on super app "variations" in Asia (Steinberg et al., 2022), we contribute a typology of these super-app constellations based on the distinct features identified in a collection of 40 super apps from around the world. This typology provides the basis for our discussion of the local or regional differences between apps, their historical emergence, their modes of capital accumulation, and the challenges and implications arising from them.

For instance, super apps from non-Western countries or regions primarily evolve out of financial services, mobility, or telecommunications (Ajene, 2020). These origins enable rentier business models and strategies of capital accumulation, such as taking commission fees on payments and gig work (e.g., ride-hailing). They can also use partnerships to operate between and expand across regions. For example, the South

African super app VodaPay (by Vodacom) recently partnered with the Chinese Alipay (by Alibaba) to offer its services in South Africa and Egypt. Alternatively, some super apps such as the Russian platform VK offer localised app versions to operate between and across countries to meet different regulatory obligations.

Overall, the rise of super apps and their integration into people's everyday lives invites us to delve deeper into the relatedness and situatedness of apps (Dieter et al., 2019), breaking with their conception as isolated, stand-alone software applications. They motivate, in particular, an investigation into the unique processes of conglomeration unfolding in the mobile ecosystem, focusing on the different objects being combined, how the different modules of a super app are connected, and how these processes are shaped through existing infrastructure, market conditions and regulatory frameworks.

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