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Spaces of Negotiation: Analyzing Platform Power in the News Industry

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ABSTRACT


This article develops an analytical framework to examine the contingent power relations between news organizations and platforms. Eschewing one-sided, monolithic perspectives on platform dominance, we instead theorize power as relational. From this perspective, we observe important variations in news organizations' degree of platform in/dependence. Examining these variations, we propose the concept of *spaces of negotiation*, which refers to the opportunities available to news organizations to determine how they produce, distribute, and monetize content vis-à-vis platforms. Building on research in journalism studies, platform studies, and related disciplines, we identify three key variables that shape these spaces of negotiation: (1) platform evolution, (2) stage of production, and (3) type of news organization. A systematic analysis of these variables, we contend, allows for a more nuanced, less deterministic understanding of the role of platform companies in transforming the news landscape.

KEYWORDS

News publishers; platforms; power; negotiations; metrics; business models; journalism studies; platform studies

Introduction

With the widespread uptake of digital platforms and apps, news organizations around the globe have progressively aligned their business models, distribution infrastructures, and production practices with platforms. This platformization of journalism has triggered both public and scholarly concerns about the impact of tech companies—most prominently Facebook, Google, Amazon, and Apple—on news publishers' editorial autonomy and economic independence (Bell et al. 2017; Ekström and Westlund 2019; Nielsen and Ganter 2018). Scholars, in an attempt to make sense of such concerns, have explored myriad platform-related changes, including how news organizations and individual journalists deploy audience metrics and platform data (Cherubini and Nielsen 2016; Hanusch 2017; Petre 2021); develop distribution and marketing strategies in relation to platform infrastructures and algorithms

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(Caplan and boyd 2018; Nechushtai 2018; Smyrnaio and Rebillard 2019); exhibit a steady reliance on Silicon Valley for both funding and organizational imperatives (Fanta and Dachwitz 2020; Ingram 2019; Küng 2015); and (fail to) generate revenue through platform monetization ventures (Bell et al. 2017; Meese and Hurcombe 2021; Myllylahti 2021). Together, these studies indicate that while news organizations have overall become more platform dependent, there is also widespread *variance* in both the emergence and evolution of the institutional relations between platforms and news organizations.

To gain more systematic insight into this variation, this article proposes an analytical framework that examines the *contingent* power relations between these actors. Drawing on examples from specific platforms and news publishers around the globe allows us to see both similarities and differences in the relations of dependence within the contemporary news industry. To this end, we eschew one-sided, monolithic understandings of platform dominance and instead theorize platform power as relational (Nielsen and Ganter 2022; van Dijck, Nieborg, and Poell 2019). From this perspective, we examine how news organizations *negotiate* their institutional position vis-à-vis platforms, affecting how the online news landscape takes shape.

To be clear, our use of the term negotiation is not meant to imply that news organizations and platforms are on equal footing. News producers are scarcely able to negotiate directly (in the narrowest sense of the word) with platform executives in pursuit of more favorable payment schemes or recommendation algorithms. Instead, platform companies predominantly set the terms and conditions under which news organizations can produce, distribute, and monetize content. As various commentators have observed, for platform owners, news is “just one type of information” (Vos and Russell 2019, 2342). Likewise, news organizations, like other content developers, are just another side in platform markets (Nieborg and Poell 2018). In the words of Emily Bell (2021, 295), founding director of the Tow Center for Digital Journalism, “the core of platform companies is software engineering; they are at the core of our business, but we are not at the core of theirs.” In short, news organizations are much more dependent on platforms than the converse.

Hence, in this article, we employ a broad understanding of negotiation; in particular, we propose the concept of *spaces of negotiation* to describe *the opportunities available to news organizations to determine how they produce, distribute, and monetize content vis-à-vis platforms*. Examining these spaces of negotiation, we can observe continuous strategic maneuvering by both types of actors. Owing to the ethos of “moving fast and breaking things,” platform companies incessantly adapt their algorithmic curation systems and developer terms, as well as routinely launch new services, funding schemes, dedicated data tools, and native content hosting and monetization programs to entice news organizations to join. News organizations and journalists, in turn, don’t necessarily adapt to such changes or join such initiatives. Instead, they frequently contest metric demands and systems of algorithmic visibility, invent creative “workarounds” in response to platform governance, and challenge platform business models by developing their own online monetization strategies (Christin 2020; Meese and Hurcombe 2021; Petre 2021). These kinds of negotiations happen at both the strategic level, concerning “long-term plans and objectives,” as well as at the more

immediate, tactical level, wherein news organizations oscillate among “coexistence, confrontation, and collaboration” (Nielsen and Ganter 2022, 79–80).

Constructing an analytical framework to examine these contingent power relations, the article is developed through the following steps. First, we review the extensive research in journalism studies on the relationship between news organizations and platforms, focusing on two related areas of platform integration: audience metrics and business models. Following this review, we propose to bring journalism studies more thoroughly into conversation with platform studies to enable more systematic insight into how news publishers and platforms become entangled. The remainder of the article develops the analytical framework itself, identifying three key variables that shape the spaces of negotiation of news organizations vis-à-vis platforms: (1) platform evolution, (2) stage of production, and (3) type of news organization. We will demonstrate how the examination of these variables allows for a more detailed and precise understanding of when and why news organizations align their operations with platforms or alternatively pursue more independent strategies.

Metrics

Explorations of the relationship between platforms and news organizations are often animated by two interrelated questions: how the latter employ audience metrics, and to what effect. News organizations’ reliance on quantifiable platform measures of affect—clicks, likes, shares, comments, and more—is embedded in practices that well predate the digital age; throughout the second half of the 20th century, media companies deployed scientific methods and collected data on “the audience” (Turow 1992). The rise of platforms has intensified this “rationalization of audience understanding” (Napoli 2011, 31; see also Baym 2013). Efforts to quantify and predict news consumption drive the proliferation of so-called “audience analytics,” which refers to the “systems and software that enable the measurement, collection, analysis, and reporting of digital data pertaining to how content is consumed and interacted with” (Zamith 2018, 421). These systems, such as Chartbeat, CrowdTangle, and Parse.ly, often aggregate data from multiple platforms, providing journalists quantified measures of audience preferences and behaviors (Ibid. 422). In practice, most news organizations employ external metrics—such as those based on platform data—as well as internal metrics, including measures of traffic to the news organization’s website or app (Nguyen 2013).

Research shows, on the one hand, that the proliferation of metrics intensifies pressure on news organizations to *converge* in their operations (Christin 2020; Petre 2021; Nielsen and Ganter 2022). Comparing how metrics are used at *The New York Times* and the highly data-driven (now defunct) Gawker Media, Petre (2015, 57), found that these organizations, which were once “polar opposites in their orientations toward metrics,” were moving closer toward one another. Reflecting on this convergence, Petre wrote: “no commercial media organization is exempt from playing the traffic game” (Ibid.). What facilitates this trend is that many journalists appear to have developed a progressively favorable perspective on metrics. They do not see a fundamental tension with editorial autonomy, which was a key concern in earlier studies on the

datafication of the news process (Currah 2009; Dick 2011; Vu 2014). Interviewing Australian journalists, Hanusch (2017, 1582), noted, for instance, that most felt that metrics supported their work and provided insight into what their audiences want, without undermining traditional news values and judgements. Similar observations have been made in other recent studies on the role of metrics in the news process (Cherubini and Nielsen 2016; Zamith 2018).

On the other hand, despite the ongoing datafication of news production, journalism scholars also note substantial *variation* in how metrics are used within different news contexts. Examining newsrooms across Europe and North America, Cherubini and Nielsen (2016) found that metrics can mean different things in different organizations, as publishers tend to align metrics with their editorial priorities and business models, which range from commercial to nonprofit and public service media. This confirms earlier accounts of the strong role of managerial decisions and organizational cultures on the employment of data within the newsroom (Usher 2014).

Questions remain, however, about the consequences of this variation for news organizations' degree of *dependence* on platforms. While many individual journalists do not perceive metrics as a threat to their editorial autonomy, this is not to say that they (or their employers) are economically and infrastructurally platform independent. As we will argue in this article, to understand how news organizations depend on platforms, it is vital to thoroughly examine the use of metrics in relation to a publisher's business model.

Business Models

Considerable research suggests that the rise of platforms has negatively impacted the financial health of the news industry. Platform companies, most prominently Facebook and Google, have profited handsomely from the growing consumption of news through platforms, monetizing the increase of user attention through targeted digital advertising. While news publishers hoped to regain lost advertising dollars through platform monetization programs, few have succeeded (Bell et al. 2017; Myllylahti 2021; Nielsen and Ganter 2022).

We can identify two waves of such programs. First, beginning around 2015, various platform companies launched native hosting programs—for example Facebook's Instant Articles, Apple News, and Google's Accelerated Mobile Pages (AMP)—which allowed partnering news organizations' content to load much faster; speed is, of course, the currency of the news business. Some of these programs also shared advertising or subscription revenue with news partners. Nevertheless, this revenue mostly fell short of publishers' expectations (Bell et al. 2017; van Dijck, Poell, and de Waal 2018).

In recent years, Google and Facebook have developed additional news services, including Subscribe with Google, Facebook News, and Google News Showcase—all of which purport to enhance the revenue of news organizations. Examining these programs, Myllylahti (2021) found that while hundreds of publishers have signed up, they tend to steer revenue toward large publishers that draw a lot of attention and succeed in converting users into subscribers. In other words, these platform services, like

platform markets more generally, display strong winner-take-all dynamics (Poell, Nieborg, and Duffy 2021).

Crucially, however, the economic power relations within the digital news landscape have not been solely shaped by platforms. Rather, news organizations have also pursued their own digital strategies to become economically sustainable. In the 2010s, many news organizations sought to generate revenue through online subscriptions, using paywalls to compel users to pay for access to news content (Carson 2015; Chyi and Ng 2020). This strategy is important for our analysis, as it potentially enables news organizations to remain economically and infrastructurally independent from platforms. Yet, the degree of independence appears to vary based upon the type of news organization. Not surprisingly, large-scale news organizations and well-known news brands have the most success in this effort, while small news outlets have struggled to entice users and subscribers (Myllylahti 2021).

Taken together, research in journalism studies provides important insights into how news organizations employ audience metrics, as well as how these organizations develop monetization strategies in relation to platforms. The research highlights important correspondences but also substantial variation between news organizations in the areas of infrastructural integration and business model alignment. Yet, missing so far is a more systematic understanding of how platform companies' evolving strategies affect the positioning of different types of news organizations, as well as how these strategies shape the different stages in news production. In other words, we need a comprehensive analytical framework to understand how platforms and news publishers position themselves in relation to one another.

Bringing Journalism and Platform Studies into Dialogue

Developing such a framework calls for a deepened conversation between journalism studies and platform studies—and one that draws from key insights across such fields as business studies, media industry studies, science and technology studies, and infrastructure studies. Describing the current chasm between journalism and platform studies scholarship, Nielsen and Ganter (2018, 1604) note how journalism studies scholars “have tended to focus on individuals and organizations, and on contingent and incremental processes of change,” while “researchers working in the broader field of platform studies have focused on how the affordances of digital technologies affect activities [...] that rely upon them” (Ibid.). Bringing these fields together to examine how platforms and news organizations shape each other is especially crucial because of the staggering power asymmetries that characterize these relationships (Ibid., 1602).

Pursuing such an inquiry, it is first necessary to consider, from a relational perspective, what a *platform* is and what the process of *platformization* entails. Drawing on software studies, political economy, and business studies, elsewhere we (Poell, Nieborg, and Duffy 2021, 5) have argued that platforms can be understood as “data infrastructures that facilitate, aggregate, monetize, and govern interactions between end-users and content and service providers.” This definition recognizes that platforms simultaneously operate as multi-sided markets, data infrastructures, and governance frameworks. This, subsequently, allowed us to work toward an understanding of

platformization as it relates to the cultural industries, which concerns the “penetration of digital platforms’ economic, infrastructural, and governmental extensions into the cultural industries, as well as the organization of cultural practices of labor, creativity, and democracy around these platforms” (ibid.). Analyzing how this process takes shape in the news industry requires an examination of how platforms develop such extensions and, conversely, how news organizations organize their production processes—i.e. news creation, distribution, marketing, and monetization—in relation to platforms.

Undoubtedly, the allegedly dominant role of platforms in the news industry is anything but straightforward. The task ahead, then, is to generate insight into the complex spaces of negotiation in which news organizations, often under strong economic pressure, are strategically (re-)positioning themselves in relation to platforms—as well as the implications of such (re-)positionings for the circulation of news and informational content. Taking up this task, we identify, in the following sections, three interrelated variables that shape how platforms and news organizations become entangled: (1) platform evolution, (2) stage of production, (3) type of news organization.

Platform Evolution

One key variable impacting the relationship between platforms and news organizations is temporality; platformization is not static but, rather, should be understood as an ongoing process, or *evolution*. Indeed, as science and technology studies scholars remind us, there is no set trajectory or predetermined path along which (media) technologies evolve (Feenberg 2002). Instead, as van Dijck (2013) argues, platforms go through a marked phase of “platform ambiguity” and “interpretative flexibility,” during which it is anything but assured what a platform is meant to do, to whom a platform opens its infrastructural boundaries, and how a platform’s business model—if any—might work. Recall how several of Facebook’s “products”—most prominently the introduction and subsequent implementation of the News Feed went through numerous iterations, some of which were fiercely contested from users (Bucher 2012). As we will see, seemingly small tweaks to the News Feed’s algorithm can have a profound impact on the visibility of news content.

Analytically, platform evolution comprises three dynamic parts: (1) how a platform functions and subsequently changes as a *multi-sided market*, which is determined by a platform’s adoption among consumers and external institutions, such as news organizations; (2) the stage of a platform’s *infrastructural development*, which concerns creation and distribution facilities as well as monetization capacities, and (3) its *governance framework*, or the rules, guidelines, and norms that structure both a platform’s business model and infrastructural access. These three dynamics are inherently interrelated, prompting scholars to speak of “coevolution” (Tiwana, Konsynski, and Bush 2010). Important to note is that a market’s competitive dynamics are *exogenous* to the platform; news consumers’ willingness to pay (be it with money or attention), for instance, lies outside the control of a platform company. Infrastructure and governance, meanwhile, are *largely endogenous* to a platform ecosystem as platform companies may provide news organizations with the means of production and determine

the conditions of use. Owing to this mix of endogenous and exogenous dynamics, no single actor—not even the platform company—ever retains full control over a platform ecosystem. Let us unpack these three parts—markets, infrastructure, and governance—in more detail.

First, for more than three decades, business scholars have theorized platforms as “multi-sided markets,” which aggregate institutional connections between two or more “sides” in a market (Rietveld and Schilling 2021). A classic example of a pre-digital two-sided market would be a physical newspaper, which connects readers—the demand-side—with advertisers—the supply side. To jump-start their growth, contemporary multi-sided platform markets, such as Google Search, Facebook Messenger, and YouTube, have long exhibited a keen interest in attracting news organizations, which have become a “side” in their respective markets. After all, news brands furnish built-in audiences and provide quality content that increases the likelihood of consumers returning to the platform.

The economic dimension of platform *evolution* is relevant to news organizations because the moment a multi-sided market comes into being, its owners and operators are faced with a delicate balancing act. That is, when a platform subsidiary is launched and starts its “life cycle,” it must get consumers and third parties “on board” (Gawer 2021). Here, we see one of the many strategic conundrums faced by news organizations: joining a platform early is risky as it involves non-trivial costs, such as training editors, adopting new tools, and changing editorial processes (Christin 2020; Poell, Nieborg, and Duffy 2021; Usher 2014). Joining later, meanwhile, introduces risks of a different ilk: there is more competition in a platform’s “mature phase,” and end-users tend to be less committed (Rietveld, Ploog, and Nieborg 2020). Then again, the overall pool of consumers can be exponentially larger. For news organizations, this shift in consumer heterogeneity—their size, composition, or willingness to pay—strongly affects the space of negotiations vis-à-vis platforms. When platforms grow and diffuse more widely, individual news organizations tend to become economically less significant for platform companies as the latter find other ways to retain consumers (Ibid.).

To court news organizations in these early stages, platforms tend to offer an array of incentives. For example, a decade ago Facebook privileged the distribution of “social news” through its main platform. Yet, this did not last long, the platform company soon began to deprioritize this commitment, instead focusing on “quality” content. Then in January 2018, Facebook proclaimed that it would design its algorithms to boost posts from family and friends over news and other types of content (van Dijck, Poell, and de Waal 2018; Caplan and boyd 2018). In correspondence with these shifts, Bailo, Meese, and Hurcombe (2021), through a longitudinal study (2014 to 2020) on the evolving relationship between Facebook and 32 Australian news outlets, observe that the overall performance of these news outlets on the platform worsened over time. Digital news organizations focused on social news, such as BuzzFeed Australia and Junkee, saw a marked decline in Facebook traffic. News organizations have been quite vocal about the sudden impact of Facebook’s decisions, which complicate its institutional relationships (Meese and Hurcombe 2021; Myllylahti 2021).

Second, when it comes to evolution, a platform’s competitive dynamics are inevitably impacted by endogenous dynamics, such as the design of its products and

services (Tiwana, Konsynski, and Bush 2010). Platform companies pride themselves on their software engineering prowess and provision of ever-evolving, global infrastructures that allow for the immediate production of digital content (Plantin et al. 2018). Or, as Nechushtai (2018, 1053) put it: “Facebook and Google now influence all three stages of news production: internal and external communications, tools and platforms for crafting stories, and platforms for news distribution.” This is to say, there are different levels of infrastructural platform integration among news organizations.

In terms of content monetization, a news organization may integrate Google and Facebook’s digital advertising technology into their websites and apps. Similarly, they may integrate consumer-facing platform technology—(e.g. comment or login functionalities)—to acquire or retain users. In terms of content distribution, news organizations have become increasingly reliant on mobile phone users and, consequently, the app stores operated by Google and Apple. At the same time, news publishers with global aspirations, such as *The Guardian* and *The Financial Times*, have been open about their usage of cloud computing infrastructures, such as Amazon Web Services, to host content, produce and stream video content, or streamline internal workflows. As of now, though, the full extent of such complex infrastructural dependencies remains largely unknown.

For news organizations, a recurring challenge is at the tactical level: how to access platform infrastructures and under what conditions? Information systems scholars have pointed to the importance of analyzing “boundary resources:” the tools, data, and documentation provided by platforms (Ghazawneh and Henfridsson 2013). These resources are constantly tweaked, altered, and upgraded, whereas data interfaces such as application programming interfaces (APIs) are set up and deprecated on a whim (Helmond, Nieborg, and van der Vlist 2019). Importantly, the fact that platform companies own and operate key boundary resources provides them with significant control over infrastructural access. This points to the third evolutionary dimension: platform governance.

Faced with the problem of scale, platform companies have struggled to provide uniform and equitable guidelines and terms of service (Gillespie 2018), which particularly impact news organizations. To Facebook/META, news is merely another form of content and therefore falls under the same moderation and curation principles as cat videos and memes (Carlson 2018). Conversely, journalists—forced to make decisions concerning political, controversial, and potentially distressing content on a daily basis—understand their craft differently. Indeed, traditional news values and ideals sit in evident tensions with regimes of algorithmic visibility (Bucher 2012). In the end, “Facebook was not designed to give us the news” and the “algorithmic values” that determine what kind of content gets prominently displayed on its News Feed tend to be at odds with standard news values (DeVito 2017, 753).

In sum, business model alignment and infrastructural integration is a double-edged sword for news organizations. Access to platform markets may be lucrative; platform infrastructures may make audience data more accessible; and digital distribution may be free. Yet, such access and adoption practices depend on constantly changing tools, shifting technological standards, arbitrary end-user facing algorithms, and opaque

governance frameworks—all of which increase the long-term costs and risks of platform dependency.

Stage of Production

Media industry studies published in the late 20th century highlighted the distinctive moments, or stages, of the industrial cultural “production” process—from financing and creation to distribution and exhibition (e.g. Murdock and Golding 1973; Turow 1992). However, ethnographies of journalism—much like the wider sub-discipline of media industry studies—primarily emphasized the process of *creation* or, in (Tuchman 1978) terms, “news making.” Canonic news sociologies thus foregrounded institutional decisions about *which* events counted as news-worthy—and for *whom* (Ibid; Schudson 1989; Schlesinger 1990). Consequently, news infrastructures—including transportation systems, mechanisms of delivery, and points of sale—were scarcely addressed. Indeed, as Gaunt (1992) argued in the early 1990s, “the way in which news is conveyed from media vehicles to consumers—has been sadly neglected” (p. 89).

With the resurgence of news production studies in the aughts (Boczkowski 2005; Deuze 2013; Singer 2004)—many of which charted responses to digitally wrought transformations—questions of distribution were no longer a mere afterthought. Rather, inquiries into citizen journalism, the 24/7 news cycle, and news managers’ incessant drive to metricize content, testified to the collapsed distinction between the phases of content creation and circulation. When an amateur or independent journalist uploads content to a Wordpress blog or Substack newsletter, for instance, these platforms function as sites of both news production and distribution (Bailo, Meese, and Hurcombe 2021; Holton and Belair-Gagnon 2018). In other cases, such as when workers at news organizations respond to internal or external pressures to share their content on Facebook, TikTok, or Twitter, the stages of production and distribution remain somewhat distinctive. As such, we contend that it remains analytically productive to consider the phases of news production separately when accounting for platform power in the news industry.

In what follows, we discuss the role of platforms in reconfiguring the stages of (1) creation; (2) distribution; and (3) marketing and monetization. Within each stage, news organizations seem to have more or fewer opportunities to operate autonomously from platforms in an economically sustainable fashion. In general, though, it seems that editorial processes—gathering information, filing and producing stories, marking up material—can still operate *independently from* platform companies, whereas news content distribution, marketing, and monetization are increasingly integrated with platform infrastructures (Nechushtai 2018, 1051; Nielsen and Ganter 2022, 9).

At the same time, platforms compel news organizations and individual journalists to *create* content ready-made for the forms and formats that dominate the contemporary digital landscape: from the pithy textual format of Twitter to 30-minute podcasts, to the narrative contexts introduced by short-form video-sharing platforms like TikTok (Hermida and Mellado 2020; Vázquez-Herrero, Negreira-Rey, and López-García 2020). Both scholars and journalists have noted how demands to create cross-platform news content are impacting the creation process. Facebook’s mercurial treatment of

news organizations, which we mentioned in the previous section, has had an especially acute impact on journalists. According to an investigation by journalists Alexis Madrigal and Robinson Meyer (2018), incentives Facebook created for video suppliers in the years surrounding the 2016 U.S. Presidential election had far-reaching consequences. Indeed, the platform's overhyped—and misleading—"pivot to video" led many news companies to swap long time reporters with video producers; as a result, several hundred journalists lost their jobs (para 3; see also Tandoc and Maitra 2018).

Nagging fears about unemployment notwithstanding, today's journalists are increasingly tasked with furnishing a multi-platform logic—one where fluency with platform features can eclipse longstanding ideals guiding news-gathering processes. Bossio (2021), for example, has shown how journalistic obligations are evolving in response to the platform-specific vernacular of Instagram. Her interviews with Australian journalists reveal how the perceived demand to accommodate the app's visual culture brushes up against the norms and considerations that guided the predominantly textual approach to reporting. Vázquez-Herrero and colleagues (2020), meanwhile, show how news executives feel compelled to adapt content to TikTok in hopes of securing audiences. In practice, efforts like these translate into an adaptation to the platform's "dynamics of viralization and co-creation [including] trending hashtags, audio tagging, participation in challenges, lip-syncs and user reactions from its publications—to which the participative actions are punctually added" (p. 14). These examples demonstrate that if an organization decides to engage in platform-dependent news work, it does so in a way that internalizes the "logics" of social media—programmability, popularity, connectivity, and datafication—(van Dijck and Poell 2013), which in turn speaks to the contingent nature of news content.

Considerations of *news distribution*, meanwhile, foreground how content is "select[ed] and coordina[t]ed to the point of exhibition" (Turow 1992, 26); over the last two decades, questions of physical distribution infrastructures have been supplanted by the recognition that distribution increasingly takes place online. In this transition, distribution has very much become a process of negotiation and struggle between news organizations and platforms. In the mid-2010s, various platform companies launched native hosting programs, which allow users to consume news content of partnering organizations on the platform rather than on the website or in the app of the organization itself. In later years, these programs were thrust under increasing scrutiny as they triggered antitrust concerns while failing to generate the expected revenue for news organizations (Bell et al. 2017; Jeffries 2020). At the same time, commercial legacy news organizations have made concerted efforts to gain control over online news distribution and especially increase their revenue by trying to convert users into subscribers. These efforts limit the circulation of content through platforms, as paywalls are used as the primary instrument to compel people to pay for content (Carson 2015; Chyi and Ng 2020). What these institutional interactions indicate is that the platformization of the news distribution is far from a straightforward or irreversible process, but one that can evolve in a variety of directions depending on the strategies of news organizations and platform companies.

The *marketing* of content is developing in similarly ambiguous ways. Garnering visibility in the contemporary attention economy certainly means promoting news stories

across a raft of social media platforms (Myllylahti 2020). As such, news producers are increasingly attuned to the keywords and search terms likely to elevate their positions in social media feeds and search engine results, respectively. Individual journalists are, as considerable research shows, expected to promote their content—and often themselves—with gusto (Hedman 2020; Molyneux et al 2020). One platform-dependent trend in what Cohen (2015) and others have described as “entrepreneurial journalism” is the newsletter genre. Since the launch of Substack in 2017, a number of high-profile writers have left their posts at news organizations in hopes of making money through newsletter subscriptions. Substack takes a ten percent cut of the revenue but offers a substantial degree of editorial flexibility (Tracy 2020).

As the example of Substack suggests, some of the key forms of news *monetization* are entirely distinct from dominant platforms. As noted, news organizations, particularly those with paywalls, can offer audiences direct subscriptions to their print, digital, and/or mobile content. As of 2021, news providers such as *The New York Times* and *The Washington Post* (US), *The Financial Times* and *The Guardian* (UK), *Le Monde* (France), and *The Globe and Mail* (Canada) retain hundreds of thousands, or even millions, of paid subscribers (Ang 2021). At the same time, platforms like Apple and Google have sought to bring back this content onto their platforms by providing readers with subscriptions to several publications for a single fee (e.g. Subscribe with Google, Apple News+). The rub for platforms is that not all news organizations are necessarily willing to participate in such initiatives. *The New York Times*, for instance, severed its partnership with the Apple News app in 2020, and *The Guardian* made the same decision in 2017, although they have since rejoined (Gartenberg 2020). Hence, also in terms of monetization, we can observe a strategic dance in which platforms and news organizations are constantly repositioning themselves in relation to each other.

Types of News Organizations

As suggested earlier, there is a strong correlation between news organizations’ business models and their degree of economic and infrastructural dependence on platforms. This connection is, however, by no means pre-determined. In this section, we examine the role of the *type* of news organization and the degree of platform dependence versus independence.

At one extreme are *born-digital publishers*—among them, BuzzFeed, Vox Media, Group Nine, Vice Media—which have fully integrated and aligned their distribution, marketing, and monetization strategies with platforms. These publishers have pioneered the use of audience metrics in every aspect of the news process, optimizing for the aggregation of users through social media platforms (Cherubini and Nielsen 2016; van Dijck, Poell, and de Waal 2018). As Hurcombe, Burgess, and Harrington (2021, 389–390) point out, the particular genre of news associated with these publishers is distinct from traditional news genres; so-called “social news” is characterized by (1) “vernacular conventions and pop culture sensibilities of social media,” (2) “shareability built around the affordances, sociable cultures, and affective publics of platforms,” and (3) “transparent positionality that consistently supports and identifies

with politically progressive platform cultures.” Initially, these data and content strategies, which critics identified as “clickbait,” were economically viable. For digital publishers, the referral traffic from a platform like Facebook was a tremendous boon (Caplan and boyd 2018). However, this has also made these publishers highly dependent on platforms for monetization: as they generate revenue predominantly through advertising, they cannot fall back on offline or online subscriptions in the way other news organizations can.

Recent years have brought into sharp relief the level of vulnerability associated with such excessive platform dependence. Platform companies’ incessant efforts to adjust their algorithms and governance frameworks can undermine a publishers’ entire business model. When Facebook began to downgrade “shareable” headlines and privileged content by end-users, social news organizations were among the very first to see sharp decreases in traffic (Bailo, Meese, and Hurcombe 2021; Meese and Hurcombe 2021). Eventually, this governance shift forced leading born-digital publishers to lay off staff and discontinue costly newsroom practices, such as investigative reporting. In 2019, BuzzFeed, laid off no less than 15% of its total workforce and closed its national US news desk (Petre 2021, 183). In a perpetual quest to regain traffic, digital publishers have recently begun to shift their attention back to Google Search, trying to optimize their ranking in search results and, consequently, user traffic (Meese and Hurcombe 2021). Although such attempts appear to have been partly successful, they obviously do not negate platform dependence. As long as digital publishers are reliant on digital advertising, they are forced to reckon with the Google/Facebook duopoly. As a result, their space of negotiation will remain inherently limited.

Compared with born-digital publishers, *legacy news organizations*—particularly large national and international news providers, such as *The New York Times*, *The Guardian*, *Le Monde*, and *Frankfurter Allgemeine Zeitung*—can enjoy a much greater level of platform independence. This is not to say that these organizations can ignore platforms. Just like social news publishers, legacy publishers have datafied their operations and employ audience engagement and growth editors to target social media users (Petre 2021). Yet, their use of metrics and mechanisms of content creation differ markedly from their born-digital counterparts. As such, these organizations tend to employ what Cherubini and Nielsen (2016, 9) describe as a “distinct form of editorial analytics,” which are “aligned with their editorial priorities and organisational imperatives.”

Moreover, in response to the monopolization of the online advertising market by Google and Facebook, legacy news organizations have ramped up their efforts to grow subscriptions. With dwindling advertising, online subscriptions have become a primary source of revenue for many publishers (Myllylahti 2021). This shifting economic model inevitably impacts how news organizations’ employ metrics (Hanusch 2017). To entice consumers to pay for their content, publishers seek detailed audience data about potential subscribers. In this quest, referrals and off-site social media audience analytics are far less relevant than direct web and app traffic and engagement metrics. Direct traffic not only generates more granular data, but also correlates with more loyal readers and higher conversion rates (Meese and Hurcombe 2021; Nielsen and Ganter 2018). Thus, both in their use of metrics and development of their digital

business models, legacy publishers can position themselves relatively independently from platforms. In other words, they tend to have more space of negotiation than born-digital publishers.

It bears repeating, however, that scale and scope still matter in the news business. Only publishers with a strong national or international brand presence have managed to retrain or grow subscriptions enough to compensate for lost advertising revenue. Most news organizations, by contrast, have struggled to convert users into paid subscribers. Subscription rate data illuminate how stark the disparity is among publishers; the 2021 Reuters annual news report shows that in the US, 45% of all digital subscriptions are tied to just three newspapers: *The New York Times*, *The Washington Post*, and *The Wall Street Journal* (Newman et al. 2021, 14). Similarly, in the UK, more than half of all subscriptions are with *The Times*, *The Telegraph*, and *The Guardian*, whereas in Finland just one publication—*Helsingin Sanomat*—accounts for nearly half of all digital subscriptions (Ibid.). In this regard, the economics of the digital news landscape are far from homogeneous.

For most commercial publishers, the digitization and platformization of news and journalism has been an ongoing tussle. The economic changes wrought by the COVID-19 pandemic brought this struggle into sharp relief. Many newspapers around the globe experienced dramatic drops in advertising and print sales; local newspapers were especially vulnerable to economic strain (Nielsen, Cherubini, and Andi 2020). Under these circumstances, news organizations are desperately trying to appeal to new subscribers. A striking example of this is UK's Telegraph Media Group, which in early 2021, announced plans to provide a salary incentive to journalists who succeeded in converting users into paid subscribers to its *Daily Telegraph* website (Montaña-Niño 2021). Over the past few years, similar bonus schemes have been introduced by other news organizations. News Corp Australia, in 2019, reportedly began to reward journalists who generate high page views and convert users into subscribers, while *Forbes* shares revenue generated through its online newsletter with its employees (Meade 2019; Kalim 2021). What these examples indicate is that while these legacy news organizations are prolific players in the online traffic game, they primarily do so to gain subscribers, which in principle should enhance their economic and infrastructural independence. It is also clear, however, that publishers have entered yet another transitional phase. Aside from large news organizations, it remains to be seen how many and what type of commercial news publishers will succeed in developing sustainable business models and whether this will allow them to remain platform independent.

While this section has primarily focused on commercial publishers, it is also important to consider *public service media* (PSM). Given that both the economic models and social objectives of PSM differ from those of commercial news publishers, it is perhaps not surprising that their institutional relationships with platforms differ, too. Studying this dynamic in the case of Australian news outlets and Facebook, Bailo, Meese, and Hurcombe (2021, 10–11) note that while many news organizations, especially digital publishers, have experienced a decline in traffic from the platform, PSM have seen an increase in engagement. The authors suggest that this could be explained in part by Facebook's preference for "trusted" sources. In Australia, PSM qualify as such.

Furthermore, the country's PSM have an obligation to reach large numbers of citizens, while not having to worry about subscriber numbers or advertising revenue. Unlike commercial publishers, which have shored up their paywalls in hopes of limiting content-sharing, PSM content can freely circulate. Of course, this *does* make the public service mission dependent on platforms, which can sit in tension with other public values these media are expected to promote (van Dijck and Poell 2015). Thus, even though PSM do not have to worry about subscriber numbers and advertising revenue, they, too, have to negotiate their position vis-à-vis platforms.

Conclusion

While recent critiques of platform dominance have productively challenged the early euphoria surrounding digital media, such criticisms do call for qualification and nuance. Platforms certainly do not single-handedly shape the transformation of the news landscape. Rather, the strategic decisions of news publishers play a crucial role in how this landscape evolves. Hence, in an effort to move away from universalist claims about platform dominance, this article has proposed a relational analysis for assessing transformations in the news industry.

Bringing journalism and platform studies research into dialogue, we observed how, on the one hand, publishers have enabled the platformization of the news environment by robustly integrating platform data and audience metrics in their operations, as well as by distributing and monetizing content through platform services. On the other hand, publishers have enhanced their autonomy and independence from platforms by erecting paywalls, converting users into paid subscribers, and by employing so-called "editorial analytics" that don't neatly translate into likes-and-clicks platform data (Cherubini and Nielsen 2016).

These organizational strategies unfold in interaction with the evolving ventures of platform companies, most prominently Facebook and Google. These companies have reshaped the news landscape by developing a range of data and monetization programs targeted, often explicitly, at news organizations. And, perhaps most fundamentally, they have transformed the news business by largely monopolizing the digital advertising ecosystem, forcing many news organizations to shift their focus from advertising to subscriptions as their main source of revenue. Likewise, but perhaps less visible, are the roles of Amazon and Microsoft in building global cloud computing infrastructures that are of direct use to news organizations.

How publishers and platforms are positioned in relation to each other, however, varies considerably over time and across the news landscape. The spaces of negotiation of news organizations vis-à-vis platforms, we propose, depend on the evolution of platform markets, infrastructure, and governance frameworks; the stage of cultural production; and the type of news organization. A systematic analysis of these variables allows for a more nuanced, less essentialist understanding of platform power and the transformation of news production. We hope to enliven researchers to offer more precise insights into the autonomy and room for decision-making of specific news organizations in a constantly evolving platform environment.

Moving forward, a key challenge for future research is to examine how these variables work in concert. For instance, when platform companies start algorithmically privileging video content over text (as Facebook has done in the past), how does this affect the dependence of news publishers on platforms in the creation process? One can imagine publishers becoming more platform-dependent in the use of boundary resources to create and distribute audiovisual media. How does such a shift impact the ability of news publishers to monetize content? Putting forward such questions, we welcome more detailed studies of how the evolution of platform tools and governance frameworks shapes the different stages of news production, as well as their impacts on different types of news organizations.

A significant hurdle, of course, will be to gain insight into how the interactions between platforms and news organizations take shape in *specific contexts*. Media and communication scholars have long noted the importance of cultural conditions and the impact of regulatory frameworks on news environments (Hallin and Mancini 2011). Platforms tend to compound these variances; for instance, comparing US and French online news companies, Christin (2020, 155) observes how journalists in these two different locales interpreted and worked with audience metrics in strikingly different ways, reproducing trends specific to national news cultures.

Particularly relevant when considering national contexts is how governments perceive and subsequently regulate the responsibility of platforms. Over the past few years, there has been increasing variation in how governments around the globe approach platform companies. While section 230 has been a key vector in U.S. debates, European countries have cracked down on data collection (Bryant 2022). China, India, and Australia, meanwhile, have implemented more robust efforts to regulate the platform-dependent news sphere. Such interventions appear to spark new rounds of negotiations between platforms and publishers (Bailo, Meese, and Hurcombe 2021; Meese and Hurcombe 2021). To understand how this works, we call for more comparative research that includes cases beyond the West. There is still much insight to be gleaned from these cases that can help to spark new understandings about how specific news cultures and modes of state regulation shape the relations between publishers and platforms. Thus, cultural-geographic context could be considered the fourth variable that shapes the spaces of negotiation of news organizations vis-à-vis platforms.

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