

# Mutual Dependencies Within the Publisher-Platform Relationship: Broadening the Perspective on the Role of Emerging Platforms in Journalism

Emerging Media

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## Abstract

Platformization is significantly transforming media markets such as film and music. While media and communication research has acknowledged these developments, its focus often is on a few very large platforms of big tech giants, overlooking emerging platforms and those serving niches. To address this research gap, this study examines the German market of journalism platforms by drawing on the spaces of negotiation framework, and applying a two-step methodological approach that combines market analysis with 17 qualitative semi-structured expert interviews. Our findings reveal that the platform market in journalism is highly dynamic and comprises more than just the well-known very large platforms. The dependencies between publishers and platforms are reciprocal, particularly with smaller platforms that are currently emerging, indicating that publishers have a degree of counter-power and can strategically shape platforms. Our study contributes to media and communication studies by offering a more nuanced understanding of the publisher-platform relationship and the related negotiation spaces.

## Keywords

media platforms, organizational relationships, news publishers, platformization, dependencies, spaces of negotiation

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## Introduction

In the last few years, media and communication studies have recognized a development towards platformization in several media industries (Evens & Donders, 2018; Nieborg & Poell, 2018; Sullivan, 2019). The notion of “platformization” captures the process by which platforms become central actors in the organization and governance of media markets by exploiting network effects between media producers and audiences (McIntyre & Srinivasan, 2017; Poell et al., 2019) while trying to position themselves as intermediaries (Evans & Schmalensee, 2016; Hagiú & Wright, 2015; Smicek, 2017). For example, Spotify is the new center of the music industry (Fleischer, 2021), and Google plays a crucial role in the distribution of journalism (Myllylahti, 2018).

Particularly in journalism, however, platformization has often been viewed critically (Myllylahti, 2024; Nielsen & Ganter, 2018). Here, platforms are perceived as a challenge as their successive take-over of online advertising undermines the business model of publishers, which has historically been based on the sale of subscriptions and advertising space in journalistic products (Myllylahti, 2018; Nielsen & Ganter, 2022). Further, publishers cannot renounce platforms, which promise a huge and monetizable audience reach in the digital sphere, without endangering their current business model (Nielsen & Ganter, 2022). Moreover, the platforms’ position enables them to act as gatekeepers, a governing role that allows an actor to decide which information is disseminated (Wallace, 2018). Their algorithms thus shape what content becomes visible to audiences (van Dijck et al., 2018; Wallace, 2018). This also has a direct impact on publishers’ business models, as small changes in the algorithm can result in a significant decrease in traffic (Meese & Hurcombe, 2020; Nielsen & Ganter, 2018).

Research is largely in agreement that there is a strong one-sided dependence of publishers on platforms and a market imbalance, where platforms are typically considered to be synonymous with the very large, dominant platform companies such as Google, Facebook, or Jinri Toutiao (Myllylahti, 2024; Nielsen & Ganter, 2022). However, this disregards the fact that platforms are also dependent on publishers due to their nature (Poell et al., 2023), which gives the latter a certain degree of bargaining power (Porter, 1985). In addition to these “very large online platforms” (Breton, 2023) that have more than 45 million monthly active users in the terminology of the European Union’s Digital Services Act, there are also various smaller and emerging platforms that specialize in certain media sectors, including journalism (e.g., Erbrich et al., 2024; Raats & Evens, 2021; Wayne & Sienkiewicz, 2023; Weber et al., 2021). Even though media and communication studies have pointed out that publishers should spread their content over several outlets and follow multi-platform strategies (Doyle, 2015; Lischka, 2015), there is currently a lack of knowledge regarding these emerging platforms. In the case of platforms that have not reached a larger scale, questions surrounding the balance of power remain largely unexplored. Overall, our current understanding of the publisher-platform relationships, as well as the mutual dependencies and the spaces of negotiation (SoN; Poell et al., 2023) that arise from them, remains insufficient.

To address this research gap, the present study aims to explore the relationship between publishers and platforms, particularly emerging and niche platforms, in the case of the journalism industry. Thus, the study refers to “journalism platforms” in order to describe sectoral platforms specifically designed for journalism and news content (Weber et al., 2021). The research question (RQ) of our study is:

RQ: How can the relationship between publishers and journalism platforms, particularly emerging ones, be characterized in terms of mutual dependencies and SoN?

To answer our RQ, we empirically analyzed the market for journalism platforms in Germany and, building on these findings, conducted 17 semi-structured expert interviews with publishers,

platform managers, and industry experts in order to provide a triangulated and differentiated perspective on the relationship between these players. The German market was chosen because it is the biggest market in terms of language in the EU (Behre et al., 2023) and still has a relatively high level of newspaper readership and dominant publishers (Friedrichsen, 2017).

Our findings show that the market for journalism platforms is highly dynamic and comprises more than the large platform companies. The dependencies between publishers and journalism platforms are far from being unilateral but are rather reciprocal, especially when it comes to emerging journalism platforms. In consequence, it is evident that publishers also have certain (counter-) power over these platforms and the possibility to strategically shape them, especially when coordinating with each other. In essence, the results of our study contribute to developing a more nuanced view of media and communication studies on the publisher-platform relationship and extend the analytical framework of SoN (Poell et al., 2023).

This article is structured as follows: In our literature review, we first define our understanding of platforms, followed by an introduction of the SoN framework and a discussion of previous research findings on the dependencies of publishers and platforms regarding the respective other side. Then, we describe our methodology. In our results section, we explore the relationship between publishers and journalism platforms and the mutual interdependence of both sides. We examine the potential risks and opportunities for publishers and journalism platforms, as well as their respective strategies to enhance their negotiating positions. Finally, we discuss our findings in light of the SoN framework and conclude our paper with an outlook and future research implications.

## Literature review

### *Mutual dependencies between platforms and their complementors*

Within (media) economics, platforms are often characterized as a basis that can be used by third parties (complementors) to build and distribute their own products (complements) (e.g., Cusumano & Gawer, 2002; Gawer, 2022). From this standpoint, platforms can be understood as two-sided markets (Rochet & Tirole, 2003, 2006) that mediate and nurture transactions as intermediaries or matchmakers between different market sides (Evans & Schmalensee, 2016; Hagiu & Wright, 2015; McIntyre & Srinivasan, 2017).

Due to the economic nature of platforms, they often reshape whole markets and industries, as well as the respective power relations (e.g., Evens & Donders, 2018; Fleischer, 2021). In particular, big tech companies reach very powerful positions representing a quasi-monopoly in many sectors (Srnicsek, 2017). The concentration on a few platform companies creates a situation where content producers seem to be heavily dependent on third parties who govern these platforms and decide on the curation of content towards users through their algorithms (Nieborg & Poell, 2018).

However, the dependencies between content producers and platforms are not exclusively pointing in one direction. Evans and Schmalensee (2016) show that, vice versa, platforms are dependent on their complementors, thus they need good relations with them in order to succeed (Cusumano & Gawer, 2002; Rietveld & Schilling, 2021). The platform-sided dependency is caused by network effects, as platforms in their emerging phase have to put a lot of effort into crossing what the authors call the “critical mass frontier” (Evans & Schmalensee, 2016, p. 78). To establish themselves in the market, platforms need to have at least one market side with enough users to drive other market sides to the platform. What the platforms face in the beginning is a chicken-egg problem, because it is uncertain whom to attract first to the platform: the audience or the complementors. Therefore,

the platforms' business can implode if they cannot solve the chicken-egg problem and pass the critical mass frontier (Evans & Schmalensee, 2016).

Consequently, platforms are also reliant on complementors. Research indicates that content creators and rights holders leverage their influence to renegotiate the terms of use of their intellectual property when the interests of complementors conflict with those of platforms (Hartley et al., 2023; Poell et al., 2023).

### *Analytical framework: SoN*

To capture these reciprocal dynamics in the platform-complementor relationships in journalism, Poell et al. (2023) introduced the analytical framework of SoN, which connects platform and journalism theories. The framework conceptualizes power dynamics between platforms and publishers as relational, delineating three key variables that influence the SoN. First, it considers platform evolution, viewing platformization as a continuous process rather than a static state. Platform evolution is influenced by the composition and changes within the multi-sided market, the infrastructural development of the platform, and its governance framework. Second, the framework identifies the stage of production as a critical site for negotiation, encompassing the creation of content in relation to platforms, its distribution via platforms, and its monetization. Third, the framework differentiates between types of news organizations, arguing that established legacy media organizations are in a stronger position to negotiate with platforms than newly founded digital-born media organizations, as the former do not rely exclusively on platforms to distribute their content. In this sense, SoN provides a framework for examining the relationships between platforms and publishers. By shedding light on the negotiations, SoN addresses a fundamental aspect of the platform-publisher relationship, capturing the underlying power dynamics and dependencies between publishers and platforms.

To enhance their position in these negotiation areas, publishers can implement various strategies. The literature shows that complementors, such as publishers, can disintermediate from platforms to establish their own distribution channels (Gielens & Steenkamp, 2019; Schauerte et al., 2024; Zhou et al., 2022). For example, Hartley et al. (2023) describe two extreme cases that try to completely detach themselves from platforms in certain respects. For example, the Danish news start-up Zetland tries to withhold its content systematically from platforms to stay independent. Also, NRK Nyheter, the news branch of the Norwegian public service broadcaster, disintermediated from Facebook to be able to better control the dialogue with its audience.

Additionally, complementors in neighboring media industries demonstrate that content can be strategically withdrawn to negotiate more favorable outcomes for complementors. Famous examples of strategic withdrawal of content are those of Taylor Swift, who removed all of her songs from Spotify for a certain period (Théberge, 2021), or the temporary removal of all the songs licensed by Universal Music Group from TikTok (Rackham, 2024; Smith, 2024).

Moreover, news organizations try to diversify their online distribution, for example, by pursuing multi-platform strategies (Doyle, 2015; Lischka, 2015). The literature also demonstrates that this practice of multihoming by complementors or publishers restricts platforms. The more effective complementors can demonstrate their ability and willingness to switch platforms if conditions deteriorate, the more concessions platforms will be compelled to make (Chellappa & Mukherjee, 2021; Gal-Or & Shi, 2022).

This means that platforms are not a self-propelled success but are dependent on the actual market situation. Accordingly, platforms are not omnipotent actors. Publishers can use several strategies, among them withholding of content and platform disintermediation, to assert their interests. Against

this backdrop, the SoN framework can serve as a guideline for analyzing how the platform-publisher relationship is negotiated.

### *The case of platforms in journalism*

In terms of the platform-publisher relationship, the situation in the journalism industry is unique in comparison to other media industries. In journalism, on the one hand, platforms are part of the dilemma that publishers face today since they actively contribute to the erosion of publishers' business model (Nielsen & Ganter, 2022; van Dijck et al., 2018). On the other hand, platforms could also be part of the solution, as can be seen in other media industries where they have contributed to establishing new payment or business models (Evens & Donders, 2018; Fleischer, 2021; van Dijck et al., 2018). Spotify, for instance, introduced new revenue streams to the music industry that have since become central to content monetization (Fleischer, 2021; Vonderau, 2019). Similar efforts to establish new payment models have been made in the field of journalism. Research suggests that in journalism, as in other media markets, access to bundled content can increase consumers' willingness to pay, which is in line with principles of information goods economics (Erbrich et al., 2024). However, such initiatives tend to primarily originate from new entrants and emerging journalism platforms (Weber et al., 2021).

In consequence, to analyze the situation in journalism comprehensively, it is insufficient to examine only the relationships between publishers and very large platforms. The landscape of journalism platforms is far more complex and differentiated (Weber et al., 2021). This can be illustrated by the German market, which encompasses a diverse range of journalism platform types with different business models:

- news aggregators (aggregating content from various sources in a real-time feed, typically financed through advertisement on the platform),
- subscription-based platforms (offering access to all content on the platform for a monthly "flat rate" fee),
- online kiosks (selling e-papers) and
- single article kiosks (selling single news articles from a certain content bundle, such as a newspaper) (Weber et al., 2021).

This indicates that relationships and the SoN between these platforms and publishers might differ and need to be examined in detail in each individual case.

### *Research gap*

In the context of journalism in media and communication studies, platforms are typically seen as synonymous with the dominant very large platforms (e.g., Myllylahti, 2024; Nielsen & Ganter, 2022), while emerging journalism platforms and niche services have received relatively little scholarly attention. Our study aims to address the prevalent gap by broadening the perspective on relationships between platforms and complementors in the media industry and extending the SoN framework based on emerging platforms in journalism. By differentiating between platform types and analyzing the dynamics of the field, we not only provide insights into previously overlooked market segments of emerging journalism platforms but also assess their relevance and potential for journalism.

## Method

To study the relationships between journalism platforms and publishers, we combine two methodological approaches. In a first step, we replicated the 2020 market analysis by Weber et al. (2021) to capture the current market situation of journalism platforms in Germany. We focus on Germany, as, in terms of language, it is the largest market for digital journalistic content in Europe (Behre et al., 2023). Moreover, the German market, though shrinking, has a fairly high newspaper readership and is still dominated by financially strong publishers (Friedrichsen, 2017). This procedure enabled us to gather the necessary information about the evolution of the context and the current market situation, especially to identify the wide and rich sphere of journalism platforms in Germany, including those that are emerging or address certain niches. In a second step, based on this thorough analysis of the market, we conducted semi-structured expert interviews with a sample of market actors and experts from the journalistic field to explore in-depth the relationships between platforms and publishers. The research design is based on a more extensive study conducted in 2023 (Buschow et al., 2023).

### *Step 1: Market analysis*

The market analysis was conducted between May and June 2023. To identify the total population of journalism platforms in Germany, a two-step search procedure was applied. In a first step, we looked up the terms “journalism platform,” “flat rate for newspapers,” “magazine platform,” “newspaper platform,” “newspaper app,” “magazine app,” and “online kiosk” (terms translated from German) in the three search engines Google, Yahoo, and Bing (Emmer & Strippel, 2015). In a second step, these search terms were also applied in the Apple AppStore and the Google Play Store to identify journalism platform applications. Further, based on the cases found, we conducted a snowballing approach in both app stores, such that our sample included apps that were considered similar (Waters, 2015). During manual adjustment, cases were only included in the sample when fulfilling the criteria, derived from the definition of journalism platforms (Buschow & Wellbrock, 2023; Weber et al., 2021):

- The platform hosts content from multiple (at least two) different publishers.
- The provided content is in the German language and the platform targets the entire German public (and not only specific sectors such as media professionals). The owners’ headquarters need not be in Germany.
- The platform focuses exclusively on journalism and news, excluding generalist platforms like Facebook, TikTok, or X (Twitter).
- Its core functions are to bundle, structure, and connect content with users.

With this approach, we identified a total of 63 platforms in the German market. In the following, these cases were analyzed by a qualitative, type-forming content analysis alongside 13 categories, including revenue model, ownership, presentation, and content (Weber et al., 2021). After analyzing the cases on the basis of the codebook, we grouped the cases using a combination of attributes indicating empirical regularities and meaningful relationships. In this way, four different types of journalism platforms in the German market were identified. The analysis was carried out independently by two researchers. When ambiguous cases occurred, they were reviewed by researchers and subsequently classified according to the evaluation of available options. In instances where a definitive affiliation could not be ascertained, the cases were designated as unique.

**Table 1.** Sample of Expert Interviews.

Category	Subcategory	Number of interviews
Publishers	Newspaper publishers	5
	Broadcaster	1
	Digital-only media	2
Journalism platforms	News aggregators	2
	Subscription-based platforms	3
	Online kiosk	1
Industry experts		3
		$\Sigma 17$

Source: own diagram.

## Step 2: Expert interviews

On the basis of our sample of journalism platforms, we then conducted 17 semi-structured interviews via video calls with managers in leading positions of various market actors and industry experts from June to August 2023. In order to gain the most comprehensive understanding of the situation regarding the German market, our sampling approach aimed for a maximum of variance (Creswell, 2018). We used our market analysis from the first step as the basis for drawing our sample on the platform side. Further, we aimed to gain a broad perspective of the publisher side. Therefore, we conducted interviews with different publishers, such as newspaper publishers, a broadcaster, and digital-only media. To contextualize these perspectives, we triangulated them with additional interviews with industry experts (Table 1). The interviews lasted between 35 and 90 min, with a total of approximately 18 h of audio.

The selection was guided by our sampling goal of achieving a maximum of variance within the platform and publishing ecosystem that our interviewees provided. The study followed ethical social science standards for work on human subjects and was approved by the ethics committee of Technische Universität Ilmenau. All interviewees gave their informed consent for the interviews to be conducted and recorded. All data was handled in accordance with the General Data Protection Regulation (GDPR) of the European Union. After transcribing and anonymizing the interviews, the recordings were deleted.

The interview guidelines for the three categories of interviewees addressed, among others, the following categories: business model, dependencies and power relations, and cooperation and licenses. The questions in the business model domain were used to gain a deeper understanding of the platforms' business models (Evens & Donders, 2018) and to assess the relevance of the platforms to the publishers' business model (Myllylahti, 2019; Nielsen & Ganter, 2022). The second block of our interview guidelines focused on the dependencies and power relations of platforms (e.g., Evans & Schmalensee, 2016; Gawer & Cusumano, 2008) and publishers (e.g., Myllylahti, 2019; Nielsen & Ganter, 2022), while the third block aimed to shed light on the cooperation and licensing agreements between platforms and publishers (Nielsen & Ganter, 2022).

To analyze the data, we applied standard procedures of qualitative research. In a three-staged coding process, the categories from the interview guidelines served as a deductive point of origin, allowing us to assign data to our overarching categories. In a second step, these predefined categories were expanded by inductive open coding. Further, we synthesized our analysis by grouping descriptive codes and subcodes into clusters (Saldaña, 2016). Following these steps, we executed another coding cycle in which we further developed the initial codes and categories to concepts of higher theoretical order (Miles et al., 2014).

## Results

The results section first addresses the situation in the German market for journalism platforms and their relevance to publishers. Secondly, the results shed light on the interests of publishers and platforms by outlining the opportunities and risks for both, in order to understand which interests shape the relationship and negotiations between the two parties. Third, the power dynamics between platforms and publishers are analyzed, highlighting that these are relational and mutual. Finally, the strategies employed by publishers and platforms to enhance their position during negotiations are elucidated.

### *Journalism platforms in the German market*

In order to understand the publisher-platform relationships, we first need to grasp the current market situation of journalism platforms. Our analysis showed that in the summer 2023, 63 cases of journalism platforms were present in the German market. This is a total of 24 cases more than in the previous analysis in 2020, with seven cases having quit the market since the prior study. These developments indicate a certain level of dynamism and growth in the market, showing that the platform landscape in German journalism is undergoing transformation.

Based on our empirical analysis, we found the four types of journalism platforms described in the literature (Weber et al., 2021). However, Blendle, the last remaining case of a single article kiosk, exited the German market in September 2023. That implies the failure of the micropayment business model in Germany, reflecting the challenges in sustaining specific monetization strategies. Consequently, there are three different types of platforms remaining: news aggregators ( $n = 37$ ), subscription-based platforms ( $n = 13$ ), and online kiosks ( $n = 4$ ).<sup>1</sup> News aggregators bundle individual articles in real-time feeds. Online kiosks sell bundled e-papers to users. While the nature of these two types has not changed, the segment of subscription-based platforms is subject to differentiation. In the 2020 study (Weber et al., 2021), these platforms mainly offered e-papers in bundles for a monthly fee; today, there is a growing trend of these platforms to focus on single articles.

Interestingly, journalism platforms in our sample were almost exclusively owned by third parties from outside the journalism industry. In 2023, no German publishers other than Axel Springer SE operated such a platform. Furthermore, Axel Springer currently disinvests: While it held shares in three platforms in 2020 (iKiosk, Blendle, upday), the company was only invested in upday in 2023. Beyond this, there is no discernible pattern of ownership, i.e., ownership of journalism platforms in the sample is diverse, encompassing start-ups (e.g., Articlett, Articy, vocca), big tech companies (e.g., Google, Microsoft), and hardware companies such as Sony.

When confronting publishers with the relevance of these journalism platforms, interviewees stated that by far the most important services are the very large platforms Google News and Google Discover for the distribution and monetization stages of production. As our interviews show, the services of Google have by far the biggest audience reach and generate the most traffic, even though the total share of traffic coming from these platforms differs from publisher to publisher. One interviewee outlines:

That's why Google plays a very big role. The other aggregators are much more volatile. [...] So we're talking about completely different dimensions – [others are] much more fluctuating.[...] [Google has] been a reliable source of traffic for twelve years. (Publisher 04)

While Google's services play a very significant role in the industry, all other identified platforms are currently of minor relevance. In terms of online kiosks and subscription-based platforms

offering access to e-papers, the publishers stated that these platform types can offer some additional revenue and enable a secondary usage of content, which is usually hard to monetize in the digital environment:

It's a distribution channel. It's not that big. [...] You get shares depending on usage and that's additional revenue. Nothing big, but not uninteresting for magazines, because [...] the digital pay models don't really work for magazines. (Publisher 03)

For certain legacy media, another reason for distributing content via these subscription-based platforms and online kiosks is the possibility of reporting reading and sales figures on these platforms to the statistics of the *Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern (IVW)*, a German organization that collects and publishes data on media's circulation and reach. This is of particular importance as the IVW measures are used to set the prices for advertisements in print media. Counterintuitively, publishers aim to stabilize advertising prices for print products by cooperating with these platforms. In consequence, they are not regarded as innovative new revenue streams, but rather as a measure that extends the viability of the old business model by securing the indirect network effects between their readers and advertisers in their two-sided print products.

Our findings from the German market of journalism platforms reflect the differentiation between large journalism platforms, such as Google News, and those currently emerging or serving niches. The importance of platforms for publishers varies depending on their size. The larger the platform, the more significant its network effects and the greater the degree to which publishers are dependent on it, which implies that platforms' bargaining power is directly connected to the strength of their network effects.

While publishers engage with multiple platforms, Google's dominant position remains unparalleled in its importance and influence. However, our analysis has demonstrated that smaller and more specialized platforms introduce alternative value propositions and business models to the market. For example, subscription-based platforms are trying to establish payment models similar to those in the music and film industry (Fleischer, 2021; Vonderau, 2019). Due to their emerging phase and the different business model, their bargaining power towards publishers differs heavily from Google's and is so far less understood.

### *Opportunities and risks of cooperation*

Platforms enable publishers to expand their reach, accessing new and diverse audience segments: By far the most important reason for a publisher's presence on a platform is to exchange journalistic content for audience reach and monetizable traffic, which is essential to their business model. This opportunity is best exploited via news aggregators as reach generators. Next comes direct revenue through the licensing of journalistic content or revenue shares, such as those paid by subscription-based platforms and online kiosks. Only in third place are opportunities to improve visibility and journalistic brand perception via platforms. This hierarchy of opportunities is summarized very concisely in the following quote from one interviewee: "It is always: traffic, revenue, brand" (Publisher 04). In the absence of these added values, the platform's bargaining power with publishers significantly weakens.

Additionally, there are plenty of perceived risks in making content accessible via journalism platforms. The main risk arises from the fact that publishers are heavily dependent on the large platform companies, especially Google. This prompts them to withhold their content for other platforms for fear of creating new dependencies with further third parties.

Moreover, our interviewees showed a huge skepticism, especially towards subscription-based platforms that aim to distribute publishers' paid or premium content: "No one simply joins in [on such a platform]. Because everyone wants to sell their own subscriptions and is worried that too little [revenue] will come out of it" (Publisher 03). Further, the reliability of traffic streams from platforms to publishers is of the greatest importance for publishers: "It has to be reliable. So business is always, can I calculate with it?" (Publisher 04).

These findings support research by Nielsen and Ganter (2022), who found similar motivations and objectives of publishers to join platforms. However, in addition, our results show that publishers are also interested in direct monetization of their content through revenue sharing and licensing models, at least as long as the platforms' offerings do not cannibalize their own.

Furthermore, in terms of platform governance decisions, the interviewed publishers expressed concerns that platforms are trying to force zero-click strategies (i.e., reducing the need to click through) and thus undermining the potential to monetize customers through publishers' own services, such as their websites. In light of our market analysis, this concern is partially justified. We identified a few cases where it would be difficult for users to be redirected to the actual sources of the content, often requiring several clicks. In regard to platform evolution and the potential for further changes in the SoN, our interviewees also expressed concerns about the constant improvement of AI services (i.e., "search generative experience"; Simon, 2024).

Several publishers pointed out the risk that platforms generate relevant network effects by building an audience with their help and then start producing their own content. An often-mentioned example from the German market was the platform upday by Axel Springer SE which, at a certain point in time, started to produce and push its own content. This was criticized by most of the publishers interviewed who were present on upday.

Switching to the perspective of journalism platforms, our interviews revealed that platforms are not facing as many risks. Besides minor issues like the potential damage to the platforms' brand, if publishers fail to adhere to the quality standards (Platform 03), the main risk for platforms is the general skepticism of publishers regarding their services. This skepticism can further increase when a platform is owned by a competitor. Some of our interviewees explained that the services of Blendle and upday had to put a lot of effort into convincing publishers to join their platform because both platforms were (or still are partly) owned by Axel Springer SE: "The publishers [...] were of course also irritated when individual publishers then became shareholders [of Blendle], which is always an absolute no-go" (Platform 06).

Nevertheless, our interviews indicate that platforms have, in general, a high motivation to cooperate with publishers since the core of the platforms' business model is based on third-party content. Therefore, the publishers' content is a necessary condition for the success of platforms. This creates certain dependencies on the platforms' side, which underlines that, also in the case of journalism, platforms need to maintain good relationships with their complementors to reach long-term success (Gawer & Cusumano, 2008).

### *Mutual dependencies of publishers and platforms*

As outlined in the description of the German market, Google is by far the most important platform for publishers in the German market and a significant source of traffic. Google's position allows the platform to internalize the network effects between the publishers and the audience (Hagiu & Wright, 2015; Rochet & Tirole, 2003, 2006). In consequence, this leads to a huge dependency on Google services with very little bargaining power for the publishers, underlining the findings of prior research (Myllylahti, 2018, 2024; Nielsen & Ganter, 2018, 2022; van Dijck et al.,

2018). An industry expert interviewed in our study summed up the situation as follows: “Google is still a frenemy. [...] Google is clearly the master of generating traffic – and the balance of power is clear: Google has the power, in every form” (Expert 01).

This has several well-known implications especially towards Google’s governance decisions. Our interviews have shown that Google’s algorithms remain opaque to publishers, yet they determine what is displayed to end users (van Dijck et al., 2018). In addition to that, the interviewed publishers underlined that small changes in algorithms can have a significant impact on the amount of traffic a publisher’s content receives (Nielsen & Ganter, 2022). Also, the impact of Facebook’s algorithm changes on traffic was discussed during the interviews (Nielsen & Ganter, 2018). Nevertheless, it is also important to note that a number of publishers consider the agreement with Google to be fair in its current form. For example, one of our interviewees stated that, despite the dependencies on Google, the platform is a reliable source of traffic, enabling the anticipation and calculation of revenues (Publisher 04).

When changing the perspective from publishers to platforms, it is evident that publishers, as the producers of content, are exerting considerable influence on platforms. Publishers are powerful entities because “they still have quite a content monopoly” (Platform 04). This indicates that platforms are also heavily dependent on publishers who have, conversely, considerable bargaining power.

This is a problem for emerging journalism platforms in particular, as they cannot necessarily guarantee a large reach at the beginning, although this is the main reason why publishers join. Consequently, emerging journalism platforms are not able to skim off network effects (Belleflamme & Peitz, 2021; McIntyre & Srinivasan, 2017) and, therefore, have problems establishing themselves as relevant market actors. Our interviews with managers of emerging journalism platforms showed that these platforms often fail to cross the critical mass frontier (also see Evans & Schmalensee, 2016). So, as long as platforms cannot promise significant reach or revenues, publishers are not really interested in cooperation which makes the situation a good example of the chicken-egg problem (Evans & Schmalensee, 2016). Also, one of our interviewees sums this up in the following way: “... we don’t have [any reach yet], because we are a start-up. Yes, if you don’t have any reach, then you won’t get any content. So that’s the chicken and egg principle, of course” (Platform 05). These dependencies on the platform side emphasize that publishers have more options with regard to their content than previous research suggests (Poell et al., 2023).

### *Negotiation strategies of publishers and platforms*

Our data indicates that publishers are using their influence and their bargaining power to achieve agreements in their favor, particularly when dealing with smaller platforms. According to our study, publishers follow different strategies to strengthen their position.

Firstly, the publishers interviewed indicated that their objective is to persuade users to directly use their own services. Ideally, for the publishers, users immediately navigate to their services without the intermediate step of searching for articles on a platform. This implies that almost all publishers strive to implement a disintermediation strategy (Schauerte et al., 2024). In this regard, platforms are seen as a possibility to attract new users and extend their organic audience. Nevertheless, this strategy appears to have limitations, as nearly all publishers continue to derive at least 10% of their traffic from platforms, particularly Google. This indicates that the complete removal of content from online platforms is unlikely to happen.

Secondly, our market analysis shows that big publishers withhold content from platforms. This is apparent from the fact that four of the largest national newspapers (DIE ZEIT, Der Spiegel,

Süddeutsche Zeitung, Frankfurter Allgemeine Zeitung) are not present on subscription-based platforms. Also, our interviews showed a huge skepticism regarding subscription-based platforms and the expected revenues from those. The strategic withholding of content in this regard can be summed up by the following quote: “There are already initiatives. In Germany, there have been repeated attempts to create a Spotify for news. [...] [No publisher] is simply going along with it. Because everyone is afraid, everyone wants to sell their own subscriptions” (Publisher 03).

A similar scenario applies to the prominent example of the only single article kiosk, Blendle, which has meanwhile disappeared from the market. From the perspective of several interviewees, Blendle represented a great opportunity and introduced a new model of monetizing journalistic content. Although some publishers participated in the platform by making their content available, they exercised strategic reluctance and did not give Blendle their full support:

[The publishers] delivered their content, but did nothing else for Blendle. If the publishers had said, watch out, [...] you can harmonize your Blendle account with your ZEIT-Online account here to use individual articles and then you can buy individual articles or whatever. And if all participating publishers had done that, Blendle would have actually emerged as a platform. (Expert 01)

Thirdly, our interviews showed that publishers also pursue multi-platform strategies (Doyle, 2015; Lischka, 2015). The majority of publishers stated that they do not grant exclusive licenses for content to specific platforms. The decision to use an open technical standard for content distribution (i.e., RSS feeds) coincides with publishers’ multi-platform presence. Publishers try to distribute their content across as many platforms as is useful to them. This means that as long as platforms do not harm or cannibalize publishers’ business models, publishers participate in platforms. As one of our interviewees explained, they “want to meet people where they are on a daily basis” (Publisher 06). However, it is important to note that decisions about presence on platforms are not always reached with full management awareness. For example, the publishers interviewed largely ignore the fact that their content is displayed in small news aggregators.

Platforms, on the other hand, face the strategic challenge of attracting enough audience in order to break the “critical mass frontier” (Evans & Schmalensee, 2016, p. 78) and make use of indirect network effects. In order to gain more bargaining power, a strategic option to respond to this challenge is the creation of embedded aggregators, platforms that combine audience reach generated in another domain with journalistic content. Among them are news aggregators embedded into other software such as Google Discover (Android), Apple News (iOS), Pocket (Mozilla Firefox), Microsoft Start (Microsoft Windows).

Therefore, these platforms can attract audiences who may not be actively seeking news content but might come across it incidentally (“incidental news exposure”; Schäfer, 2023). By the integration into other software, the attention of people who are surfing the internet or using their smartphones for other reasons is transferred to journalistic content which has a significant impact on the publishers’ traffic.

The mechanisms of embedded aggregators can be illustrated by the example of upday, a company by Axel Springer SE. Preinstalled on Samsung smartphones, upday was able to combine the reach of Samsung devices with journalistic content. Our interviewees emphasized that direct access to Samsung users was an important factor to agree with the distribution of their content via upday. Consequently, upday has lost its importance since the joint venture with Samsung ended.

In sum, platforms being able to link journalistic content with existing reach from other sources (e.g., operating systems or browsers) can soften the constraint of reaching critical mass exclusively in the field of journalism, potentially becoming key players in the distribution of journalistic

content. However, it should be noted that this strategy is not easily applicable to every market actor. Three of the embedded aggregators that we found in our market analysis are operated by the large platform companies Google, Amazon, and Microsoft.

## Discussion

When viewed against the backdrop of the SoN framework, our findings empirically demonstrate that platform power is relational. Our empirical findings underscore the complex and interdependent relationship between publishers and platforms. While platforms are indispensable for traffic generation and revenue diversification, they simultaneously pose significant risks and competitive threats to publishers. Further, the market of journalism platforms is dynamic, indicating that an ongoing platform evolution impacts the negotiation spaces within the industry. In particular, emerging journalism platforms are trying to innovate in this market through novel business and distribution models. Through the lens of the SoN framework, publishers thus encounter new potentials for negotiation in the stage of production, specifically regarding content distribution. Our results also confirm that the type of news organization influences the configuration of the SoN. At the same time, the findings provide a complementary perspective on the framework, further differentiating it by highlighting differences in organizational interests. For legacy media, engagement with certain types of journalism platforms is partly driven by opportunities for secondary use of content and by efforts to strengthen the print product.

While Poell et al. (2023) identify platform evolution, stage of production, and types of news organizations as key elements that shape the configuration of negotiation spaces, our study suggests that the types of platforms should also be considered a relevant dimension when explaining negotiation dynamics. Whereas in the SoN framework platforms are primarily conceptualized as generalist, our findings show that publishers have more room for negotiation towards emerging journalism platforms and can better shape the platforms' configurations in line with their interests, for example, regarding revenue-sharing models or the presentation of their content. Additionally, the bargaining power of the cases examined varies. Online kiosks and subscription-based platforms, in particular, are dependent on the willingness of publishers to cooperate, whereas aggregators have significantly less need to negotiate with publishers, since they compile freely available content. This suggests that platform typologies, such as the one outlined in this study, contribute to a more comprehensive description of platform-complementor relationships and, consequently, their SoN. Also, further differentiation into subtypes has the potential to yield valuable insights. This is exemplified by the embedded aggregators, who employ strategies that leverage audiences from other domains. As a result, these aggregators enhance their bargaining power and accelerate platform evolution, by bypassing the gradual process of building critical mass. Accordingly, future research should consider the different types of platforms in order to conduct a more nuanced analysis of negotiation spaces.

In light of the SoN framework, our findings allow a deeper understanding of the platform evolution by focusing on journalism platforms in the emerging stage, that face the chicken-and-egg problem, in which platform evolution depends simultaneously on content and users: To develop, platforms require sufficient content to attract users, yet they also need a substantial user base to draw publishers who supply that content (Evans & Schmalensee, 2016). This dynamic underscores the importance of platforms maintaining positive relationships with publishers to ensure a consistent flow of high-quality content (Rietveld & Schilling, 2021), which is essential for their survival, growth, and ultimately, achieving maturity. Platform maturity (as an indicator of the state of a platform's evolution) can be assessed, in part, by the level of reach a platform offers to publishers.

However, our interviews indicate that reach alone does not fully capture platform maturity. For publishers, the predictability and reliability of traffic flows and licensing revenues are equally important indicators. Overall, the more established and mature a platform's evolutionary state, the smaller the negotiation spaces become.

## Conclusion

In this paper, we aimed to understand the relationships between publishers and journalism platforms, particularly emerging and niche ones, in light of their mutual dependencies and SoNs. In several respects, our study complements previous findings and expands the state of knowledge in media and communication studies by developing a more nuanced view of the publisher-platform relationship, concerning the interests as well as bargaining power and strategies of the involved parties. As a central contribution, our study extends the SoN framework (Poell et al., 2023) by introducing two additional analytical dimensions: (a) types of platforms and (b) platform maturity as an aspect of platform evolution. Furthermore, the study emphasizes that platform typologies, such as the one applied in this study, enable a more comprehensive understanding of the relationships and negotiation processes between actors in platform environments.

## Limitations


Our research has limitations that point towards future research needs. Our sample is limited to Germany, excluding journalism platforms such as Cafeyn, which is especially relevant in France. Thus, we propose an expansion of the scope and extension of our study to encompass additional countries. This would allow a more detailed understanding of journalism platforms and comparative analyses to be carried out. In other countries, the development may already be further advanced, and the relationship between publishers and platforms may be different. Further, the exclusive focus on journalism platforms excluded general social media platforms such as Facebook, X (Twitter), or TikTok from our sample, as a substantial body of research is already dedicated to these platforms. Furthermore, we recommend conducting a systematic, for example, user-focused analysis of embedded aggregators to gain deeper insights into the mechanisms through which platforms can transfer audiences from one service to another, thereby enhancing their negotiating position. These findings could also prove valuable for platform research in general, as they might contribute to a more comprehensive understanding of the development and evolution of platform ecosystems.


## Implications for emerging media


Overall, the strong focus on very large platforms in media and communication studies risks obscuring other relevant developments. While our empirical findings are limited to the German context, they imply, on a more general level, that media organizations retain strategic options to counterbalance platform power, including media markets outside journalism and emerging media environments where negotiation spaces between new platforms and content providers are just evolving. For example, our results also speak thought-provokingly to current developments in Artificial Intelligence (AI). With respect to AI, media industries face conditions that are, to a considerable extent, comparable to the early stages of platformization.<sup>2</sup> Although publishers' legitimate concerns about zero-click dynamics may be amplified by AI-driven aggregators that automatically summarize journalistic content, such as Perplexity or Google AI Overviews, this outcome is not

predetermined. The experience with emerging platforms shows that publishers possess meaningful bargaining power, in terms of AI, particularly through controlling access to certain exclusive content that LLMs require to function effectively and to differentiate on quality. Such content is not easily substitutable, which increases the importance of licensing and data-access agreements as a central bargaining asset for publishers. Consistent with our findings on emerging journalism platforms, the early phase of AI platformization creates an opportunity to support the provider that offers the most favorable medium- to long-term conditions and is in a position to cross the “critical-mass frontier” (Evans & Schmalensee, 2016). Not least, in the current situation, there is also the possibility that the introduction of AI will break existing dependencies. For example, although Google currently dominates the landscape of journalism platforms, it has yet to establish itself comparably as an AI platform. Despite the risks AI poses for publishers, this situation could open new spaces for negotiation for complementors such as publishers and create a window of opportunity to reposition themselves.

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### Ethical statement

This study was approved by the Ethics Committee of Technische Universität Ilmenau on May 09, 2023. All participants provided informed consent prior to the interviews. This research was conducted ethically in accordance with the social science standards for work on human subjects, and data were handled in accordance with the GDPR of the European Union.

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The authors declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

### Notes

1. Nine cases are unique and do not fit into any of the types.
2. Even though AI products were not typically platforms at first, the introduction of apps on ChatGPT (OpenAI, 2025) points to a development towards platformization in this area as well.

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