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The Press as Platform: Institutional Isomorphism and the Strategic Adoption of Platform Logics

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ABSTRACT

This paper reveals that major news outlets are starting to adopt the features of digital platforms in an attempt to become more autonomous and disentangle themselves from platform infrastructures. Our analysis sets out this phenomenon across three key dimensions, which function as instrumental cases: deploying complex subscription funnels; adopting first-party data strategies and developing advertising capabilities; and building improved personalisation and recommendation capabilities. We also draw on empirical evidence from twelve semi-structured interviews conducted with experts from news organizations working in the U.K. and the Netherlands to support our analysis. Using sociological institutionalism as a theoretical and conceptual framework, we suggest major national and transnational news media companies are now increasingly aligning with the institutional logics of the platform field, a strange occurrence given the sector's desire to avoid platform dependence. The paper ends by noting that only larger media organisations can copy platforms, leaving smaller local outlets in a weaker position, both economically and in terms of their relationship to digital platforms. This points to a divide in the knowledge, skills, resources, and capital available to establish effective counterpower strategies, and reinforces the need for ongoing attention to media concentration and power imbalances within the news media sector.

KEYWORDS

Digital platforms; institutions; counterpower; dependence; platformisation; isomorphism

News publishers and technology firms have positioned themselves as opposing institutions over the last two decades. The news media sector has been concerned about the intermediary role that platforms (a term we define later in this article) have played in news distribution and critical of the growing amount of advertising revenue these firms are securing from brands and small businesses. In response, platforms have worked to position themselves as neutral forms of infrastructure (Napoli and Caplan 2017). These contrary stances are cemented in public discourse, which has focused on the material realities of legislative reform and sectoral competition. Scholars offer a more nuanced account of the relationship between these two sectors, noting that various news publishers sought to gain larger audiences and reach by distributing

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news content on social media during the mid-2010s (Tandoc 2018; Hurcombe 2022). A key concern during this period was that news publishers would become dependent on platforms for audiences and distribution (Poell, Nieborg, and Duffy 2021). Subsequent research has revealed that while publishers were not always reliant on platforms for distribution or audiences, many were entangled in platform infrastructures more generally (Kristensen and Hartley 2023; Meese 2023; Nielsen and Ganter 2022).

The concept of institutional isomorphism has been used to assess the changing relationship between these two major institutions. In this paper, we further develop the application of institutional isomorphism to the platform-publisher relationship, drawing on the sociological interpretation of isomorphism. The concept refers to a phenomenon that occurs when organisations seek to copy each other (or sectoral leaders) when they are subject to coercive pressures, mimetic processes, or normative pressures (or a varied combination of all three) during moments of institutional uncertainty (DiMaggio and Powell 1983). Using a collective case study design (Stake 1995), our primary case explores how major news outlets adopt features of digital platforms as part of a wider institutional transformation. Our analysis sets out this phenomenon across three key dimensions, which function as instrumental cases (Stake 1995): subscriptions, data and advertising, and personalisation and recommendation. Through this analysis we show how normative, coercive and mimetic pressures have driven these strategies, with in news organisations starting to adopt the same institutional logics as platforms as a result. In doing so, the paper seeks to answer the following research question: To what extent do institutional pressures encourage news media organisations to adopt platform logics? It begins with a literature review, which discuss the scholarly trajectories sketched out above and the concept of institutional isomorphism in more detail. Key terms are defined to further clarify the argument. We then discuss our method, before turning to our findings where we show how major national and transnational news publishers have copied various platform strategies even as they work to disentangle themselves from platform infrastructures. The paper ends by arguing that that major national and transnational news media companies may continue this trend and move increasingly closer to the institutional orbit of platforms in the foreseeable future.

Institutional Isomorphism and the Platform-Publisher Relationship

The framework of institutional isomorphism states that organisations are likely to become increasingly homogenous if organisations are operating in a similar field. Fields are described by DiMaggio and Powell—originators of the conceptual framework—as "organizations that, in the aggregate, constitute a recognized area of institutional life" (DiMaggio and Powell 1983, 148). Once this pre-condition is met, homogenisation can occur through coercive, mimetic, or normative pressures (or a varied combination of the three). Coercive pressures are external pressures exerted on the organisation through societal pressure or other organisations that they are dependent on. Mimetic processes occur during moments of uncertainty or ambiguity, where there is not one obvious solution for an organisation. In such a context, an organisation may simply copy "leading peers" (Nielsen and Ganter 2022, 169). Normative pressures relate to professional standards and socialisation, which includes both within

the workplace and through associated activities, such as established educational pathways and professional networks.

Robyn Caplan and danah boyd (2018) have used the concept of institutional isomorphism to theorise the relationship between digital platforms and the news media. They describe the Facebook News Feed as a coercive mechanism, which encourages news publishers to align with Facebook's various algorithmic imperatives. The news sector's rapid embrace of web analytics and efforts to incorporate social features on their respective websites are identified as forms of mimesis. Finally, normative pressures are accounted for through emerging professional norms around the growing use of data and specific metrics (such as views and clicks) to measure audiences and assess the success or failure of articles (Dodds et al. 2023). As already noted, subsequent work has used neo-institutional approaches to look beyond Facebook to examine changes in the platform-publisher relationship more generally (see Meese 2023; Nielsen and Ganter 2022).

We continue these efforts in the following paper and identify emerging forms of isomorphism that are taking place in a vastly different commercial context. While the news media is dependent on platforms to a greater or lesser extent, the relationship between these two parties is changing. There is still news content on Facebook but parent company Meta is no longer prioritising its distribution. At the same time, major news publishers are developing alternative strategies to reduce platform dependence (Chua and Westlund 2019; Meese and Hurcombe 2021). As part of this process, leading national and transnational publishers are mimicking widely available platform features. These strategic changes as well as the subsequent intensification of automation across the news media industry (Diakopoulos 2019), has led to the sophisticated adoption and deployment of platform characteristics.

At this point, it is useful to explain what we mean by the term platform. Platforms are central intermediaries and initiators of multi-sided markets where "different groups of consumers are all users of the platform's services and in turn relate to each other vertically as buyers and sellers" (Shelanski 2013, 1677). These foundational elements are not novel to the news media industry, which was an original proponent of the multi-sided market. Newspapers and broadcasters provide a space to connect advertisers with readers and viewers who they on-sell to advertisers as audiences. However, firms like Google, Meta and Spotify have transformed the idea of the platform, moving well beyond the capacities of traditional intermediaries. Consider the definition of José van Dijck and colleagues who describe these modern entities as "(re)programmable architectures designed to organize interactions among heterogeneous users that are geared toward the systematic collection, algorithmic processing, circulation, and monetization of data" (van Dijck, Poell, and de Waal 2018, 4). Platforms are no longer just central nodes that organise relationships between two or more parties, but have significant technical capacity, can intervene in new markets, and are primarily organised around the collection and monetisation of data (Mansell and Steinmueller 2020).

With the above history and definitions now established, it is possible for our argument to account for both continuity and change. In a technical sense, news organisations have always functioned as platforms and intermediaries. However, digital platforms like Google and Facebook disrupt this position significantly, capturing both

audiences and advertising revenue. In response, news organisations essentially delegated part of their platform role to search engines and social media to reach large online audiences (Nielsen and Ganter 2022). What we outline below is the news media sector's attempt to reassert itself as a key intermediary and "reclaim control over audiences, data, and revenue" (Chua and Westlund 2019, 67). While this shift highlights structural continuities, it also reveals the significant transformations undergone by news media organisations as they adopt the traits and capacities of digital platforms. Developments here include everything from the embrace of personalisation within newsrooms (Bodó 2019) and automated content management systems (Caswell 2024), to the growing importance of data collection and analysis.

Our argument also reassesses how the notion of the field applies to platforms and news organisations. While these two actors might seem quite different, fields can involve a range of parties from "key suppliers, regulatory agencies, and other entities that produce similar products and services" (DiMaggio and Powell 1983, 148). Fields are also emergent properties that can only be "identified through empirical investigation," forming as a result of "increased interactions among actors, the emergence of coalitions, and a shared awareness of participation in a common enterprise" (DiMaggio and Powell 1983, 148). The extant literature notes increased interaction between platforms and publishers, with these two actors increasingly engaging with each other, and oriented around similar regulatory debates (Meese 2023; Nielsen and Ganter 2022). Indeed, existing work has already co-located certain platforms and news organisations in a field, claiming that Facebook was structuring the media field (Caplan and Boyd 2018).

Our paper takes an alternative perspective and argues that due to recent strategic decisions, certain news media organisations are better characterised as aligning with the institutional logics of the platform field. These developments are informed by the wider operating environment of these organisations, where automation, personalisation and the collection and processing of data are becoming increasingly normalised. The wider conceptual framework of institutional isomorphism allows us to track the drivers behind these changes and show how select news organisations are mimicking platforms even as they work to extract themselves from platform infrastructures. As news media websites evolve into platform-like environments, we see the emergence of the "similar products and services" required to establish a field through institutional analysis (DiMaggio and Powell 1983, 148). To analyse these shifts, we draw on a selection of sector-wide case studies and interviews to show how the business strategies of major news media companies have changed. We now turn to our method and outline the construction of these cases and our selection rationale.

Methodology

Our study used a collective case study approach where multiple cases are selected instrumentally, with the goal of shedding light on a wider phenomenon (Stake 1995). Three cases emerged inductively over time, as part of a broader project about the relationship between the news media sector and digital platforms (redacted for review). They are subscription strategies, data and ad strategies, and personalisation and recommendation. Our approach involves emergent case selection, which is common

in particular types of qualitative research (Stake 1995), not requiring the more stringent case selection procedures found in political science and adjacent disciplines (Gerring 2004). All of our selected cases also represent "a phenomenon of some sort occurring in a bounded context" that involves "events or processes occurring over a specified period" (Miles and Huberman 1994, 25–26).

The aim of this study is to examine a particular category of publisher rather than specific national or regional markets. We focus on "first tier" and "second tier" publishers, or international "winners" and national "champions" (Myllylahti 2024, 13). Other descriptions refer to "internationally respected newspapers that can generate significant subscriber numbers across different markets [or] popular national papers that can rely on a national audience" (Meese 2023, 27). Given the "winner takes all dynamics" (Newman et al. 2019, 10) in the sector, we suggest (and our findings show) that it is these winners who are both capable to adopt platform features and have sufficient incentives to do so. Without offering an exhaustive list, *The New York Times* or *The Washington Post* stand as good examples of international leaders in this space, and *Aftenposten* in Norway represents an outlet with strong national popularity. As is common with most innovations across the sector, outlets associated with these trends predominate in Western, Educated, Industrialised, Rich, and Democratic (WEIRD) countries located in the Global North (de-Lima-Santos, Yeung, and Dodds 2025). As a result, our study is sector-wide and broadly focused on WEIRD nations, rather than particular countries. We also focus on text-based digital news providers, which incorporates legacy media like *The Guardian* and captures broadcasters that produce significant amounts of textual media (like the *BBC*). As a result, we exclude broadcast-only providers from this study. The latter category has unique relationships to the streaming economy, with distinct dynamics that fall outside the scope of this paper.

Data was collected through desk research, observation and interviews. Desk research involved tracking major industry publications, news and associations from across the sector from 2019 to 2024 (see Table 1). Online and offline fieldwork was also conducted, with one author attending in-person industry conferences in Australia and international webinars remotely throughout the same period. Field notes were taken throughout. Interviews were conducted between March and September 2023 as part of a larger research project to investigate the strategic approaches of news organisations vis-à-vis platforms amid increasing dependences (Seipp 2024). Twelve experts were interviewed, including professionals in data analytics and public policy, representing news organisations of various sizes—seven from the U.K. and five from the Netherlands. Each interview lasted between 45 and 60 min.

Due to the longitudinal and immersive nature of the research study, documents and field notes were analysed using the Immersion/Crystallization method where data is repeatedly engaged with and re-analysed to produce categories "until analytical

Table 1. Sources for document analysis.

Association websites	International News Media Association; World Association of Newspapers and News Publishers.
Publications and news outlets	*Digiday*, *A Media Operator*, Axios Media Trends, Semafor Media, Splice Slugs; TechCrunch; Press Gazette; Mumbrella; The Guardian; The New York Times; The Verge; Neiman Lab; INMA reports.

saturation occurs" (Borkan 2022, 785). While common in qualitative communication research, this sort of inductive and immersive work is rarely formally described as a distinct method. For the interview data, thematic analysis was used to identify themes (Braun and Clarke 2006). After recording and transcribing the interviews with Otter.ai, the conversations were qualitatively analysed using Atlas.ti. Employing a mixed deductive and inductive coding approach, the interviews were examined across three themes (Vliegenthart 2012). The first theme—audience relationships and attention—provided relevant insights regarding subscription strategies, the application of data analytics, including audience metrics, and personalisation and recommendations. The second theme—technological innovation and independence—highlighted how news organisations track data and develop their own in-house technologies to reduce dependence on third-party platforms for infrastructure, data, and technology. Lastly, the third theme—economic viability and sustainability—revealed insights into strategies used by the interviewed organisations to enhance economic sustainability and competitiveness within a digital media environment dominated by platforms. These interview themes were used to guide our interpretation of the interview material but are not used as analytical categories in this paper. As is common in case study research, interviews and documents collected through desk research helped contextualise our analysis. Through triangulation these sources validated our instrumental cases (subscriptions, data and advertising, and personalisation and recommendation) which structure our analysis. While our process also resonates with grounded theory, as we have an established theoretical and conceptual paradigm in institutionalism, we did not need to engage in the sort of theory-building found in this latter methodology.

Institutional Pressures in the News Sector

Institutionalism's concepts of normative, mimetic and coercive pressures serve as the three analytic dimensions structuring our three cases. Before outlining the cases in depth, we provide a brief overview of how they fit within a wider institutional framework to help orient the reader. The table below (see Table 2) shows how these theoretical dimensions map onto our three cases. As our earlier explanation of institutionalism covered more generally, normative pressures shape shared industry expectations and practices. In our cases, organisations are establishing new norms like the embrace of first-party data, as well as re-engaging with older industry norms—like the return to subscription models (albeit with more advanced technological

Table 2. An outline of how normative, coercive and pressures shape our cases.

Case	Normative Pressures	Coercive Pressures	Mimetic Pressures
Embracing subscriptions	Increasing importance of reader revenue.	Declining ad revenue. Business model instability.	Copying platform subscription models (e.g. Netflix; Spotify).
Data collection and advertising	Industry using data for key decision making.	Changes leading to the decline of third-party cookies.	Copying platform data strategies (e.g. targeted advertising).
Personalisation and recommendation	Greater industry technological capacity.	Need to capture reader attention.	Copying platform recommender strategies (e.g. TikTok).

capabilities). Coercive pressure stems from the ongoing financial challenges across the news media sector. Our cases relate to the need to generate revenue in response to the sustained decline in advertising dollars. However, when it comes to advertising and data collection, regulation also plays a key role with various jurisdictions introducing reforms to limit the impact of third-party cookies. Finally, mimetic pressures are found throughout our cases, with news publishers clearly viewing platforms as leaders in the field and copying their strategies across all our cases.

As the table above and our earlier introduction to institutionalism has noted, these are mutually reinforcing pressures. Given our argument that publishers are becoming more like platforms, identifying and understanding mimetic pressures might appear to be the most important. However, as we will soon see, news publishers are not borrowing platforms strategies on a whim, but because they are under significant financial pressure to sustain their businesses. Additional regulatory changes have also forced their hand. Finally, normative pressures legitimise certain solutions, which are explicitly or implicitly approved by the wider industry. While the sector would not approve of a new outlet no longer publishing written articles in favour of a short-form video feed like TikTok, adopting broader personalisation logics that resonate with platforms more generally shows how these normative boundaries are set. The following sections explore these interactions in more detail through our three instrumental case studies.

From Scale to Subscriptions

We are now seeing major news media companies returning to subscription strategies after their failed experiment with social media distribution. The coercive pressures that are encouraging news organisations to adopt this approach are the decline in advertising revenue, forcing companies to focus on subscriptions and in doing so, deploy paywalls more strategically (Bakke and Barland 2022). Our interview respondents clearly identified this strategy. Several interviewees mentioned that building direct and engaged relationships with their audience was a critical method of ensuring ongoing economic sustainability. An employee from a large, commercial media organisation in the U.K. described their primary strategy as making sure audiences engage with their content within their own environment, rather than risking losing them to platform environments. Another respondent from a different major commercial news organisation in the U.K. highlighted the increasing technical complexity associated with their subscription strategy. They explained that their "acquisition funnel […] starts with someone visiting a piece of content, which is outside the paywall". The company then tries to get the person to "return to the [outlet's] content within a certain period of time" and then increases the "intensity for them to subscribe".

There are also strong normative pressures associated with this return to subscriptions. Given our focus on leading news media organisations, the New York Times successful transition from advertising to subscription revenue, developing a subscriber base of over six million subscribers (Usher 2021). Considering the international influence of the organisation, particularly at the premium level of the market, their success sets an industry benchmark. Further evidence of norm-setting emerges once we turn to newsroom metrics. During the mid-2010s news organisations were still trying to

generate clicks and page-views to satisfy advertisers, rather than focusing on reader-revenue (Blanchett 2018; Bossio 2017). However, things have changed, and companies are focusing on the number of subscription conversions that come from an article, and how many active subscribed readers are engaging with content (Logsdon 2021). Paywalls are becoming stricter as part of this process, with fewer free articles being offered to new readers before payment is required.

These normative pressures are reinforced at industry conferences, where we see evidence of institutional isomorphism. The news media are looking to leading platforms who run leading subscription-based business models, like Netflix and Spotify, as they navigate this transition. The International News Media Association's 2023 Media Subscriptions Summit featured a keynote from Spotify's former chief economist, who argued that pricing was one of the sector's biggest challenges. He compared the simplicity of Spotify's subscription offerings with the complicated deals offered by news outlets (Olevik 2023). One of the authors also saw a presentation by *The Washington Post* at the INMA 2022 summit, where the presenter turned to video streaming platforms for lessons on how to build subscription numbers. Lessons included realising that many people subscribe to multiple services, offering perks for subscriptions and improving bundling. News outlets have started to make changes accordingly, with Norwegian publishers like Schibsted and the New York Times starting to offer bundled options (see Erbrich et al. 2024).

Other evidence of mimesis emerges when we consider the growing capacity of news organisations to manage subscription churn and retain paying readers. Large media companies like *The New York Times* have developed their own in-house causal machine learning models. These systems set personalised limits on free articles and run randomised control trials, which balance the need to inform the public with the need to meet subscription KPIs (Supekar 2023). Other publishers turn to third-party companies like Piano to deploy machine learning on their collected behavioural data to better identify similar reader trends. Regardless of whether the machine learning system is in-house or contracted out, what is key here is that major news media companies now have sophisticated back-end analytic capabilities that are platform-like. These technical capacities represent the gradual adoption of features that have previously been located within platform infrastructures, and highlight the growing importance of first-party data, a trend that we now turn to.

Data, Advertising and Autonomy

These new subscription strategies rely on the collection and processing of data, and it is here where the news organisations under examination have adopted wider platform logics. More specifically they are intensifying their collection of first-party data and are focusing more on data-driven direct advertising. External market and regulatory conditions are essentially forcing the news media to adopt platformised business models to survive. Businesses have long been aware about the importance of data in the wider digital economy, but it is only in recent years that news organisations have seriously focused on the collection, processing, and analysis of data. Moreover, for some companies investing in data is not just about better understanding what their readers do on their websites and mobile apps. The long-term opportunity is to

secure financial sustainability through providing data to advertisers and securing direct deals, in so doing reducing dependence on the wider programmatic advertising environment dominated by Google.

The main coercive pressure that has driven the above trends is the decline of third-party cookies, which is either being completely phased out or heavily discouraged by key actors. Third-party cookies have long been used by advertising platforms and advertisers to develop detailed profiles about what people do across the internet (Lischka and Siegert 2022), and growing concerns about privacy have resulted in the gradual deprecation of this technical standard. The introduction of the General Data Protection Regulation raised awareness about the presence of these cookies by mandating forced pop ups, requiring users to provide consent. However, the refusal of two key browsers in Mozilla and Safari to support third-party cookies, and Google's development of a prompt to ask people if they want to be tracked was more consequential (Joseph and Peterson 2025). As a result, the decline of the third-party cookie represents an uncertain world for many advertisers, who were used to advertising against rich consumer profiles as a matter of course. First-party data has become much more valuable and news publishers have invested accordingly, being "particularly well positioned to collect user data on a large scale since news websites are often the most frequently visited websites" (Lischka and Siegert 2022, 7).

Instability within the online advertising market has also meant that news organisations have needed to invest in their own ecosystems, to avoid becoming dependent on Google and Meta's infrastructures. Notably, one of our respondents from a commercial news media company claimed to have stopped using Google Analytics altogether in a strategic move to become more independent in terms of technological innovation, advertisement, data, and tracking. Doing so allowed their company to build their own "central data infrastructure" and disentangle from platforms and counter dependence. Valorisation of in-house advertising is another example of news companies no longer relying on third-party advertising infrastructure. This is something of a return to the past rather than an entirely new development, recalling a time when newspaper sales teams worked with brands directly to place advertisements in print copies. News Corp's Intent Connect platform (mentioned above), enables these sorts of transactions, and The New York Times launched a similar program in 2020. However, what is different from the past, is the increasingly central role that data plays in proving and justifying advertising performance.

Of course, another driver of these trends is the mimetic pressure to copy industry leaders, which tends to occur during moments of industry uncertainty (DiMaggio and Powell 1983). As news companies are establishing their own platforms, they are turning to industry leaders when it comes to implementation. For example, Norway's biggest publisher *Amedia* notes that they "have data on 50% of the Norwegian population over the age of 18 and 81% of our pageviews are from logged-in users" (Thu 2024). They go on to describe the complexity of their profiling, explaining that they have:

> 120 demographic/interest-based variables per logged-in user. These variables include gender, age/life phase, where they live, what type of housing they live in, interest in sports, economy, etc. It even tells us if they have a cabin by the sea or mountain (Thu 2024).

Similar developments can be seen in other leading national media companies, with Australian company News Corp's promoting their data collection efforts and audience targeting capabilities to potential advertisers through their Intent Connect platform (Krumel 2023). These datapoints and discursive strategies are reminiscent of those promoted by major technology firms, and signals the growing capacity of leading news organisations to not just copy technology firms but position themselves as competitors.

Data collection and analysis capabilities are the norm amongst the major international and national news organisations. For example, it is now standard for major news publishers to encourage visitors to sign-up with a profile and log-in when they read news. Whether or not the reader subscribes, their online behaviour is able to be captured through the log-in function and used to inform business strategies, as well as developed into customer profiles for advertisers. The New York Times, The Guardian, The Washington Post and Vox have all invested in bespoke advertising platforms since the late-2010s, in another example of seeking to directly compete with digital platforms (Fischer 2019a, 2019b; Seale 2020). These emergent norms have also been built on a rich and welcoming environment, with news organisations already embracing data and metrics, and embedding them into professional norms and practices (Caplan and Boyd 2018). While approaches may vary, similar trends around advertising and data collection underscores the institutionalisation of these norms across the upper echelons of the industry. The interconnected nature of these cases becomes further evident as we now consider the intensification of personalisation and recommendation systems, which rely in part on the institutionalised data collection strategies we have just been describing.

Personalisation and Recommendation

Our final case sees news media companies investing significantly in greater personalisation, with a focus on building out the capabilities of their websites and mobile applications. Most commonly, this involves establishing or improving internal recommendation systems as well as giving readers options to customise their news experience. It may seem strange to note personalisation as a novel development for the sector, given that news organisations have experimented with personalisation since the late 2000s (Thurman 2011; Thurman and Schifferes 2012). However, at that point in time outlets were drawing on simple metrics such as popularity, or other basic indicators like location. Furthermore, news webpages still tended to prioritise a shared front-page experience for readers, replicating formatting and editorial decision-making norms and practices that emerged during the print era. Improvements in automation and machine learning greater investment in data collection and analysis capabilities, are seeing outlets turning to personalisation with a renewed vigour (Bodó 2019).

News organisations have embraced personalisation and recommendation in different ways. For example, Norwegian outlet Aftenposten has produced an automated home page that presents a different selection of news for each individual reader, with limited editorial intervention around key spots. An internally developed system accounts for each individual's reading history, the last time they visited the webpage, and what other people are reading to provide a unique front page for every visitor. It also

recognises when an article has been read by an individual and removes it from the front page (Wisnes 2019). In contrast News Corp's various tabloid offerings in Australia lets readers personalise a few sections of the main home page and build their own personalised newspaper on an entirely separate page ("My News"). Regardless of how these changes have been implemented, there is growing evidence that personalisation and recommendation is being institutionalised as an industry norm. These normative pressures are further established through consequential speeches, such as one delivered by Director-General of the BBC Tim Davie who claimed that the corporation is currently "developing unique ethical algorithms that dramatically increase personalisation" while keeping "other factors in play like serendipity […], curiosity; and an interest in what our BBC editors may judge to be important stories" (A BBC For the Future 2024).

Mimetic pressures are another key driver in this renewed turn towards personalisation and recommendation. As with subscriptions, Spotify and Netflix are viewed as leading exemplars with their personalised machine learning systems seen as excellent customer experiences, but other platforms like TikTok and Instagram are also mentioned by industry reports (Felps 2022). News organisations are also directly copying the content distribution strategies of leading platforms, with various newsrooms placing vertical videos on their homepages, in a manner reminiscent of short-form video platforms like TikTok or Instagram (Tameez 2024). While these videos are not part of deeply personalised feeds, and in some cases aren't even part of wider recommender systems, the inspiration is clear.

Finally, when it comes to coercive pressure, the wider economic challenges facing the news sector, which we have discussed throughout, play a critical role here. Recent industry events have noted that for many news organisations personalisation is largely oriented around subscription retention. Investing in personalisation and recommendation forms part of a wider effort to keep readers engaging with news products and ultimately subscribing, which as noted earlier, marks a significant transition from a previous strategy that involved distributing content widely across social media (Sehl, Cornia, and Nielsen 2024). Implementation looks like targeting subscriber interests through personalised newsletters (Cashyap 2024) or using basic personalisation options (like the Financial Times' *MyFT*) on a home page to drive subscriptions (FT Strategies n.d.). Competition between news organisations is also a critical additional coercive factor here, with news organisations seeking to make the most efficient use of their data in a challenging financial environment. Many news organisations we focus on, are competing for the same limited pool of subscriber dollars. As a result, recommendation and personalisation becomes a required feature to stay competitive, rather than a choice.

Discussion and Conclusion

From the cases and interviews above, we see that major national and transnational news publishers are investing in internal technical systems and data collection and processing capabilities across a range of different contexts. Publishers are not enacting these changes independently but are learning from platforms and copying key features and practices, despite a two-decade long battle with the sector. Developments are

not only easily understood within the framework of institutional isomorphism but also represent a significant progression from the earlier forms of isomorphism already identified (Caplan and Boyd 2018). These efforts at isomorphism go well beyond seeking to align distribution with particular social media platforms, but instead see publishers copy a range of strategies, tactics and systems from platforms, all in aid of establishing autonomy over data, audiences and infrastructure (Chua and Westlund 2019). These examples stand as clear evidence of mimetic processes, which sees the actions and strategies of sector leaders copied during moments of uncertainty.

Our analysis has also shown how a range of normative and coercive pressures have also enabled these changes. These have included the collapse of existing journalism business models, a growing focus on privacy, and the further institutionalisation of industry norms across a variety of areas, from data collection and analysis to the growing importance of subscription models (Sjøvaag 2024). Recognising these overlapping pressures is critical, as they reveal that leading news organisations are not just making isolated changes but are instead undergoing significant transformation. The connections between the three instrumental cases further emphasise this point, with each strategy mutually reinforcing the other. Focusing on subscriptions requires a stronger first-party data strategy, which can go on to feed personalisation and recommendation strategies, which in turn can drive more subscriptions. Taken together, we see how the need to achieve financial sustainability is working to set a new industry standard, which sees leading news organisations become more like platforms.

Isomorphism can only occur when "[o]nce disparate organizations in the same line of business are structured into an actual field" (DiMaggio and Powell 1983, 48). Existing research has generally suggested that the best way of explaining these interactions between platforms and publishers is that platforms are structuring the media field (Caplan and Boyd 2018) or behaving like media companies (Napoli and Caplan 2017). These analyses held at the time they were written, with various platforms (most notably Facebook), actively seeking to become a central intermediary between news publishers and audiences (Meese 2023; Nielsen and Ganter 2022). However, with many platforms withdrawing from the news sector, we can no longer assume that they actively structure the field of news media. Instead, we argue that it makes more sense to view certain news organisations as aligning themselves with the strategies and logics of the platform field, a strange occurrence given the sector's interest in avoiding platform dependence (Poell, Nieborg, and Duffy 2021).

Isomorphism does not mean impersonation. Previous scholars convincingly argued that Facebook was structuring the media field, without claiming that a global social network was exactly same as an international paper of record (Caplan and Boyd 2018). In the same way, we now contend that these leading national and international news outlets can be viewed as aligning with the platform field, because they are developing causal machine learning models, collecting vast amounts of user data, and deploying their own algorithmic systems for content delivery. Indeed, we can bolster this argument further by recalling our earlier point that news media have always been seen as platforms. Their role as an intermediary between advertisers and audiences was simply disrupted as Google and Meta started to monopolise the online advertising ecosystem, capturing both audience attention and advertising revenue. News

organisations are now reasserting their position as key intermediaries for digital advertisers, while also developing their capacity to function as a modern platform for users, developing personalised experiences to support the growth of subscription revenue.

There are significant implications associated with this shift, both for these organisations under examination and the sector more broadly. Firstly, by adopting similar organisational logics, the concerns we have around platforms may increasingly apply to publishers. While publishers have been increasingly critical about the risks that digital platforms pose to individual privacy, they engage in similar tactics, such as collecting data to support advertising. In the same way that people worry about Meta's data collection, one might also raise concerns about the extent to which news publishers are prepared for their roles as storers and processors of data. Considering the growth of data-driven subscription offers and personalised recommendations, traditionally platform-centric concerns about the capacity to offer inequitable pricing to different consumer groups, or shape content distribution in particular way, may also apply to certain news publishers. Thinking about future research, scholars should attend to the intersections between these different business areas and avoid the temptation to place these two sectors in opposition to one another.

Secondly, leading news companies increasingly adopting platform logics necessarily impacts on efforts to disentangle from platform infrastructures. In one sense, the adoption of key platform features represents a clear sign of sectoral autonomy (Helberger 2020), with various news companies decreasing reliance on Google's advertising network, limiting the distribution of their content, and ultimately encouraging readers to stay on their products through personalisation and recommendation. Therefore, we should view these trends as evidence that some news organisations can work to disentangle from some platform infrastructures. However, with many of these technical systems ultimately reliant on Amazon or Google cloud infrastructure, we see that even these efforts are necessarily partial (Simon 2022). We also must recognise aligning with platform logics ultimately means competing with platforms for data and attention. While the attention economy is something of a trope these days, embracing these platform features to secure autonomy, paradoxically means also directly competing with platforms for advertising dollars as well the limited time (and in some cases income) of consumers.

Attempts at autonomy also reveal growing disparities across the wider sector. It is evident that even in a straightened economic environment, the above strategies are only available to well-resourced news organisations (Seipp 2024). Given these trends, there may be unanticipated risks associated with recent attempts to regulate platforms. For example, new European regulations, notably the Digital Markets Act (DMA) and the European Media Freedom Act (EMFA), require platforms to make audience measurements transparent to media organisations. Access to such information could further enable large media organisations, with the necessary knowledge, skills, and resources, to utilise this data to optimise their audience targeting and business strategies. This could result in increased concentration as larger organisations gain strength, potentially disadvantaging smaller media outlets and compelling them to merge due to resource imbalances (Seipp et al. 2024). We have already seen examples of larger media companies acquiring smaller outlets to establish more autonomy from platforms. This allows resources to be

concentrated within fewer media organisations, enabling them to leverage opportunities created by technology and AI (Sjøvaag 2024), and at least to some degree compete with platforms and big tech companies. However, these examples also show how these developments can potentially jeopardise media pluralism and diversity as small local and regional media are disadvantaged (Seipp et al. 2024). The trends we outline above highlight a series of further challenges small media outlets are facing as they try to survive in this increasingly concentrated media landscape (European University Institute 2024; Seipp 2023). While resource consolidation among (smaller) news organisations, including sharing data, content production, and other operation costs, could address resource disparities (Sjøvaag 2024), further empirical and legal research is necessary to evaluate the applicability of data governance frameworks as well as such strategies' long-term implications for the media sector and normative values, including pluralism, diversity, and independence.

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