MARTIN ANDREE

MUST GO!

Digital Giants are Destroying our Democracies and Economies — We Will



campus





Martin Andree teaches media science at Cologne University in Germany. He has been doing research on the dominance of Big Tech for more than 15 years. Leading German media (including public German television and leading German newspapers) and conferences (including the Digital Summit of the Federal German Government) regularly call on his expertise for contributions on this subject. In 2020, he published the *Atlas of the Digital World*, which has a strong reputation. He received the Günter Wallraff Special Award for Press Freedom and Human Rights for the book *Big Tech must go*.



Verena Bönniger is a communication designer and creative director at Delicious Layouts Visuelle Kommunikation.

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Digital Giants are Destroying our Democracies and Economies — We Will



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Preface of the English Book Release

The publication of *Big Tech must go!* (released in August 2023) sparked a huge debate about digital monopolies in Germany—including about one hundred events, interviews on television, radio and newspapers, press contributions, conference talks, panels and reviews. In October 2023, it was selected as one of the Nonfiction 'Books of the Month' (BuchMarkt). In May 2024, it received the 'Günter Wallraff Special Award for Press Freedom and Human Rights'. The book even attracted attention in many countries outside of Germany.

Indeed, one aspect of this book is particularly relevant also outside Germany: The first chapter contains the first holistic measurement of a full country's entire digital media usage. This baseline measurement is particularly interesting because it precisely quantifies the incredible dominance of Big Tech in the various categories and markets. The analysis is based on a scientifically sound, 'court-proof' baseline data measurement. The documented monopolization is NOT based just on surveys, but on the real usage out in the various markets.

Despite the fact that this analysis only shows the dramatic situation in Germany, we can assume that the level of concentration and dominance would be more or less identical in other Western democracies. For this reason, the following chapters, with their full interpretation of the implications for our media systems and our democracies, will be useful internationally. Also of interest for and potential use by international readers is the comprehensive set of solutions proposed in the last chapter to restore media pluralism in the digital world and to reestablish competition and fair access across digital media.

After the overwhelming success of the book, I received dozens of requests from many countries outside of Germany—including to give about 50 international conference talks and interviews. In parallel, the hostile and surreptitious takeover of our free media by Big Tech has drastically accelerated. This book has correctly predicted, back in 2023, that Big Tech would inevitably extend its dominance into the political sphere too. This is exactly what has happened—with Musk and Big Tech now being part of the new US government. Due to the global state of emergency, I have reacted as quickly as possible:

I have first translated the website for this book ...

- ... and also the website of the underlying scientific data measurements ...
 - ⟨₮ https://www.atlasderdigitalenwelt.de/en
- ... plus I have made a video of an English conference talk available online ...
 - * https://www.youtube.com/watch?v=IBjLYwJ0hj8

In addition, I have now translated the entire book as quickly as possible to make its content available internationally. I would like to thank Campus, my German publisher, which, in cooperation with CHICAGO—The University of Chicago Press, ensured that this English edition has been published so swiftly. I hope that it can make a contribution to save our free media from being taken over by Big Tech monopolies in the digital sphere. It's time that Western societies wake up and act—before it is too late and Big Tech has destroyed our democracies.

KNOCKOUT: How Big Tech stops 'unwanted' research

If you 'get into trouble' with Big Tech, you will not forget it in a hurry. In October 2020, I experienced the very real threat of Big Tech at first hand. Our 'Atlas of the digital world' had just been published. It is the first baseline measurement of digital media usage (information can be found at *www.atlasderdigitalenwelt.de/en*). Such measurements are important for our society. They show precisely the extent to which the Internet is already dominated by digital corporations. And here already a quick reveal: We actually measured a level of dominance that was so incredible that, at first, we could not believe our eyes (\bigcirc I.3–4).

Previously, there had been little reliable scientific information on this simple question. It is very time-consuming to carry out such data analyses. You have to measure millions of domains. You have to evaluate usage on different devices such as smartphones, desktops or tablets and analyze huge samples. Just the research equipment for such a study costs millions of euros. But, in the end, we achieved what had seemed impossible for many years. The idea was to publish this atlas periodically on the basis of the scientific data model we had developed. The plan was to provide society with information—which would be always up-to-date—on the digital basis of our democracy. The digital companies did not like our idea at all. One of them immediately took action and put a stop to it. Within a few days, the whole initiative was brought to a halt. In order to protect partners, I cannot lay out more details. But the message was clear: Leave this field of activity.

This experience changed my life. The incredible power of Big Tech or "GAFAM" (i.e. Google, Apple, Facebook, Amazon, Microsoft), which we had just scientifically measured, also encroached on my personal life during that period. I realized that the huge domination of Big Tech that our data analyses had revealed was not just a theoretical construct. Big Tech is actually using its dominant power in our society to suppress the publication of 'unwanted' information. As we will see, my experience is not an isolated case. Over and over again, Big Tech abused its power to prevent scientists and journalists from publishing 'unpopular' information ($(\mathbb{F} V.4)$.²

This experience made me realize that the digital giants can already do whatever they want in a country like Germany. They are already so powerful that they can rely on scared partners, dependent companies or institutions throughout our society to push through their interests. The presumptuousness of this approach surprised me at the time. I would not have expected that an American tech giant would dare to actively use its dominant market position to prevent future scientific research at a public university and to stop the publication of 'unwanted' data and studies in a free country like Germany. But it clearly shows the unscrupulous manner in which the digital corporations are already operating in our country.

There was one small consolation. After all, our data analysis had already been published. So this time, Big Tech had missed the boat. There is one pretty cool side effect of the seemingly uncool knowledge unit called 'a book': once it is published, you cannot delete the information any more. You cannot push toothpaste back into the tube.

When these strong reactions to our measurements came from behind the scenes, I initially asked myself: Why is that? After all, the Big Tech companies are constantly being criticized anyways. We already know about plenty of evil things they have done to our societies. The most important topics under discussion include:

- ▶ Intentional breaches of the law and active abuse of regulatory loopholes
- ▶ Spying on users and usage of their data in digital surveillance capitalism
- ▶ Passing on personal data to government security authorities
- ► Manipulation of elections (Cambridge Analytica)
- ▶ Division of society through 'echo chambers'—people mainly see opinions on platforms that confirm their beliefs
- ► Fake news and algorithmic preference for radical and emotional content, as this maximizes the attention of users
- ▶ Exploitation of cheap labor and creation of precarious working conditions
- ► Accumulation of profits plus consistent refusal to pay appropriate taxes in the respective countries of business

How can this strong reaction to our seemingly harmless scientific data measurements be explained? The answer is actually quite simple. As we know from many studies on digital corporations, they ultimately have only one goal: the accumulation of the maximum amount of power, money and domination. They see themselves as pioneers of a new, digital world that will replace the old and outdated analog world. And in this new, 'better' world, everything will have to dance to their tune. With regard to digital companies, there is ultimately only one question of interest: What can halt their unstoppable march to power?

If we look at the above criticisms of digital corporations, they all have one thing in common. Although all of these issues concern areas that are extremely harmful for the Western world—such as the division of society, social imbalance, threats to security—they are basically irrelevant to digital corporations and their efforts to grow. No matter how critically these issues are viewed, in most cases they only generate image problems or marginal penalties for Big Tech. The tech giants set aside budgets for the many ongoing legal disputes, which they can easily finance from their booming profits. For them, the cost of legal disputes is, in other words, peanuts. They can invest gigantic budgets in lobbying and PR to counter such image issues. It is no problem for them to manage it. Apart from that, the products of the tech giants dominate the market as monopolies in many cases. Bad press is annoying, but ultimately irrelevant, because most people do not feel like they have a choice anyway. They may not like the digital companies, but they still continue to use Google, WhatsApp and Instagram.

Moreover, most of the points mentioned 'only' concern ethical aspects. These can be discussed wonderfully on talk shows or at political hearings. The digital companies are regularly invited here and are allowed to speak at length. They keep repeating their supposedly good intentions, admitting mistakes, vowing to do better, and so on. We have observed this method for decades: Regrets, promises and then nothing happens.

In contrast, our topic leads right to the heart of the problem: the ongoing takeover of our media system by digital corporations. As we will see (I.1-4), the tech giants have already gone a long way with this. What could really stop their progress? We can only devise measures to counteract them if we get to a broad public awareness of how dangerously far they have already progressed with their hostile takeover. The ethical issues mentioned above are ultimately negligible from the digital companies' point of view. But these questions on media dominance take the social debate into completely different spheres, also in terms of possible penalties and sanctions. When we talk about Big Tech eliminating our democratic media landscape and destroying our economy, we are taking the discussion to an entirely new level. Then we are talking about antitrust penalties amounting to many billions of euros or even scenarios in which these companies are broken up.

This was precisely the reason why our measurement of the enormous market concentration based on solid scientific models had caused such trouble behind the scenes. The GAFAMs were aware that the issue of a hostile takeover of the Internet can quickly unite parties and groups that are often quite politically divided—if they understand what is really going on. It is obvious once you look at our data: We are *all* being cheated on by Big Tech, whether we are rich or poor, left or conservative. We are all victims of these monopolies. The digital corporations are the

mortal enemies of the left and of free market capitalism alike. Because they destroy political and economic freedom at the same time—the freedom of our pluralistic media system as well as the freedom of our pluralistic market economy.

For as long as we keep getting caught up in specific aspects and only argue with each other about fake news, surveillance or populism, we are failing to realize that we are all fundamentally affected by the hostile takeover of the Internet, regardless of whether we are progressive or conservative, whether we are arguing on the side of culture or the economy, whether we are artists or entrepreneurs.

The status quo harms all of us. If we would recognize this together, it would be easy to overcome the blinkered thinking in our political debates. Together, we could reclaim the wonderful Internet that the digital giants have stolen from us users. We could make sure that it is not only the Big Tech companies that make big money out of the Internet, but that all creators, publishers and bloggers get a chance to monetize their content in a fair way. We could revitalize the digital sphere that is currently occupied by 'colonialist' digital giants. We could make sure that our children still live in a pluralistic democracy, with a pluralistic, open media system and a pluralistic, open economy. We just have to notice the massive problem that is on the one hand so obvious, yet on the other hand seems so difficult to recognize.

As a media researcher, I have written several academic books and a handbook. In this book, I have decided to write in a more accessible way so that everyone can understand what the analyses of our data means, how our media system is doing and how far Big Tech has already succeeded in its hostile takeover. And to show how endangered our democracy is and what we can do to prevent it from collapsing.

This book is not about the usual criticisms of the digital world—that gaming is addictive, that young people's self-esteem is being damaged by Instagram consumption, that hate speech is increasingly poisoning the way we live together, that our data is being monitored, that fake news and populism are on the rise and so on. It would be just as wrong to just look at the latest technological advances (ChatGPT et cetera) without analyzing the fundamental underlying problem. This book has a purely positive relationship with the digital world. It doesn't claim that the 'good old analog world' was better in any way. I work in the digital industry and fortunately spend most of my life working on digital matters. My book is therefore strongly *in favor* of digital media.

The issue is that the digital world has been stolen from us. And yet we still have power in our hands. We can free the Internet from the domination of digital corporations ($(\ensuremath{\mathbb{F}}\xspace VI)$) and return it to the purpose for which Tim Berners-Lee originally conceived it: a democratic and anti-hierarchical means of mutual human connection,

understanding and networking. The most burning issue of the digital transformation is not its much-discussed side effects. The most burning issue is its main effect: that tech companies are exploiting the digital revolution to take over ever larger parts of our society. We need to recognize and tackle this problem. Then we have a chance.

I have presented these often complex relationships in as simple and entertaining a way as possible. I am extremely grateful that I was able to partner with the fantastic graphic designer Verena Bönniger for this project.

I dedicate this book to my two children and sincerely hope that they and their families will one day be able to live in a free media democracy, even if the chances are unfortunately slim.

Further content 'bonus tracks', updates and potential corrections can be found on the accompanying website *www.bigtechmustgo.com*. Simply scan the printed QR code to enter it.





GAME OVER 2029: The dominance of Big Tech

1. Our democracy is in danger

In a hundred years from now, people will look back on our era and rub their eyes in amazement. How on earth did a handful of digital giants take control of our democracy and our free economy at the same time? Did we fail to notice because of the huge amount of attention focused on the climate crisis, the corona pandemic and the war in Ukraine? How did Big Tech get this far with its hostile takeover of our media system, in broad daylight, without us noticing and without us mounting any kind of defence?

Everyone is talking about A.I. right now—but in retrospect, generative AI will probably be seen as 'merely' finishing off our current media system (II.6). When millions of machine-generated texts and posts flood social media, the massive devaluation of online content that has been progressing for decades will reach its final stage. Digital companies will then probably 'finish the job'. Journalism and editorial media do not have the slightest chance of surviving in their current form.

This hostile takeover of our media system by Big Tech has been going on for two decades. Our media system will no longer be under our control in just a few years. But there are few if any signs of any concern or alarm. Sure, people are discussing the opportunities and risks of generative AI. But the looming takeover of our democratic public sphere by Big Tech is not an issue, despite the fact that the media are the basis of our democracy. They inform people, they enable citizens to form political opinions, they keep a check on the politicians, they keep an eye on the rich and powerful.

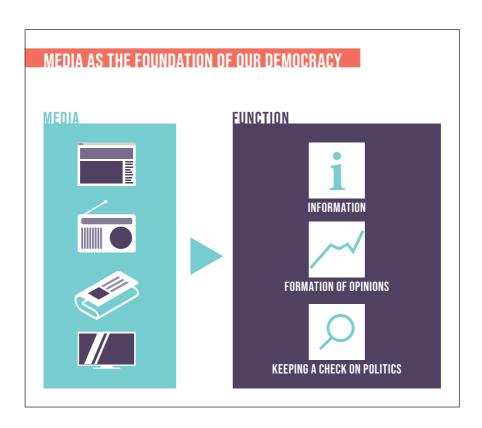
With the rise of digital media, we are experiencing one of the greatest technological revolutions in human history. The ever-increasing replacement of traditional information services by digital platforms is like open-hear surgery being performed on our democracy. We have known since McLuhan ("The medium is the message") that media are never 'innocent'.¹¹ They form the basis of our social thought patterns, attitudes and behavior. A massive change in our media landscape will have massive consequences for our democratic society.

Of course, digital companies play a central role in this process. As our holistic baseline measurement of all German internet traffic has shown conclusively, the tech giants already own large parts of this future public sphere via their dominant positions. They will own the new digital basis of our democracy in a few years. GAFAM will take over. We can assume that the situation will be identical in the other Western democracies.

This extreme dominance of media control is alarming. Under no circumstances should individual forces be allowed to gain command of our media system, regardless of whether they are political parties, the government, powerful individuals or digital corporations. If this happens, the freedom and independence of our media will be lost and our democracy will be severely damaged.

Are you surprised that this danger is not currently a topic of social debate? If so, you are right. Are you wondering if I am exaggerating or even scaremongering? Unfortunately not. We have measured the entire web traffic and our data analyses deliver crystal clear results: we will soon pass a tipping point. Beyond it, there will be no turning back. Our media system, which is the basis of our democracy, will fall into the hands of the digital giants simply due to the dynamics of the digital transformation. Let us start with the most important key points to explain this:

▶ It is a truism already that digital media will replace analog media.



- ▶ What few people realize is that this transformation is already at a very advanced stage. Digital media have already overtaken analog media and are now the leading media.
- ► Soon, in 2029, analog media will have fallen below a 25 percent share. For the analog world, that will mean: GAME OVER. The political discourse will then be in the hands of the platforms.

One key question is how quickly this transformation will take place. Another question is: what will happen if the media-based democracy as we know it is lost? How will it affect our lives? I guarantee you that the consequences for people will be very tangible (see text box at the bottom of the page).



Digital media have been the leading media since 2020.



Dominance by Big Tech—six dangerous consequences

- 1. Editorial media and journalism will continue, inexorably, to become less and less important and to melt away.
- 2. This does not only strengthen phenomena like fake news. In the future, the tech giants will be able to determine which citizens receive which news via the platforms. They are already manipulating traffic to suit their interests. Neither science nor politics have access to these processes. People are becoming increasingly disempowered.
- 3. Political expression and influence are increasingly controlled by the platforms.
- 4. The editorial media have always exercised played a role as a fourth estate, a check on other powers. Through the media, citizens have been able to publicly denounce issues or abuses, for example corruption in business or politics. Editorial media have been able to report on crime until the State prosecutors

What happens when we reach the tipping point?

A handful of digital corporations have succeeded in stealing our wonderful democratic Internet from Western societies using aggressive methods and unfair tricks (FII.2). By taking over large parts of the Internet, they have managed to exploit the digital transformation for their own purposes. They have already made a lot of progress in that endeavour. In the subsequent pages, we will scientifically demonstrate how much progress they have made. Unfortunately, we have protected our democratic order against all kinds of attacks—against antidemocratic parties, against overthrows, against violent attacks from the outside. But we currently have no effective defense mechanisms against the acute threat posed by digital corporations (FIV). And technologies such as generative AI will only massively speed up this takeover.

There is one crucial question: At what point will the dominance of the digital corporations have progressed so far (also as a result of the ongoing digital transformation) that the resulting momentum will be irreversible? From the existing data, we can see that this point will be reached in around five to ten years at

intervened. In the future, this function will be taken over by the platforms. These digital companies will be able to set the agenda in society, i.e. select the topics that are widely discussed by the general public. They will be able to actively control the so-called 'agenda setting' in our society—the selection of topics that are widely discussed.

- 5. Governments and politicians will also do a large part of their communication via platforms in the future. They will become increasingly dependent on the digital corporations. In the future, the tech giants will be able to decide at will how much attention (traffic) the various political messages receive. Only they will have access to the machine room of digital media and the distribution of messages online. And they will aggressively exploit this access to their own advantage.
- 6. Any kind of resistance to the digital elite of the tech giants will be pointless, because they have gained power over our public sphere. Our political discourse will be controlled by them.

the most. After that, it will be almost impossible to stop this dynamic, because the democratic media and the systems that are still available to us will no longer work. The total 'share of voice' of the shrunken editorial media will be too small to strike back against the supremacy of the platforms. When they were still big and powerful, they did not protest. Beyond the future tipping point, any protest will be meaningless.

We can hardly underestimate the consequences: What if the domination over large parts of our society falls into the laps of the tech giants? What if the free market economy itself falls victim to this dynamic? What happens if the digital corporations replace our pluralistic, free economic order with their monopolies? What if our democracy is damaged forever?

2. The 'point of no return': 2029

When we talk about the takeover of our media system, the key question is: Exactly how big is the threat? Let us first get a holistic overview. The media landscape currently consists of two fields. On the one hand, there are the traditional, analog offerings such as newspapers, radio and television, the editorial media. And then there are the digital media, which have been on the rise for decades, such as social media, video-on-demand (e.g. YouTube), search engines (e.g. Google), including the digital extensions of journalism and editorial publishers.

We all know that we are currently in the middle of a transformation process. Digital media are replacing analog media. It makes sense to briefly outline this process over time. The starting point of this development was in 1989. Tim Berners-Lee invented the World Wide Web during his stay at CERN in Geneva. At the time of his invention, the relative share of digital media in terms of total usage was exactly 0 percent. By coincidence, it was the same year when the Berlin Wall came down. Back then, the analog media accounted for 100 percent of usage.

We all know that digital media are taking over. We know anecdotally that young people are already using digital media almost exclusively. We know that the older generations are also becoming increasingly digital. But when it comes to determining exactly how far this transformation process has progressed, most people have no clear answers at hand. After all, it makes a difference whether the media that form the basis of our democracy are 10 percent digital, 50 percent digital or 80 percent digital. In fact, it is not at all easy to identify reliable answers. If we wanted to get scientifically sound knowledge, we would have to 'track' a very large number of people using one and the same monitoring methodology. In other words, we would have to measure their exact media consumption across all various channels and formats down to the minute and the second.

No such study exists. It is far too complicated to measure the various forms of media consumption. Just imagine the research equipment that would be needed just to measure exactly how many minutes a day a person reads a newspaper. But don't worry, there is an answer to our simple question about the importance of digital media. We will just take a small detour and look at another question: in which channels (analog or digital) are companies spending how much money on advertising?

Digital media have been the leading media since 2020/21

Why does this detour via investment in advertising make sense? Well, all media bundle the *attention* of large audiences. It does not matter which channels are used to attract this attention, whether it happens on the radio, on TikTok or when reading a magazine. But the combined attention of all media is then sold to advertising companies.

Naturally, advertising companies think very carefully about where they should invest their valuable money on advertising. They have hundreds of measurement methods at their disposal to determine exactly where to invest: Where do I get the most attention for the money I pay? An entire industry of market research companies and agencies earns hundreds of millions of euros every year by analyzing the selection of these channels for advertising companies.

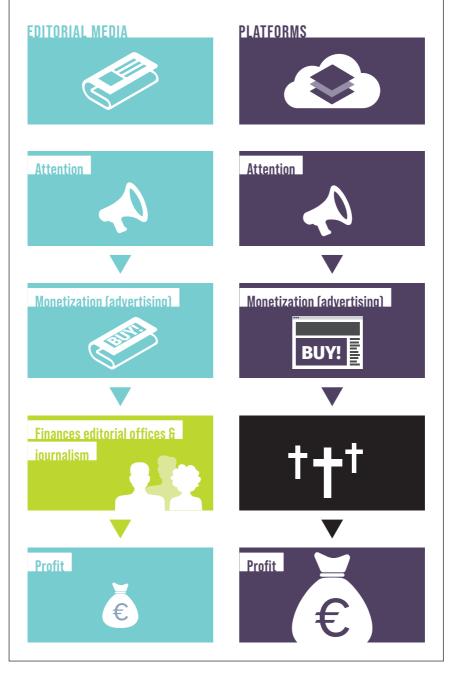
This is precisely why advertising investments provide a wonderful indicator of the relative importance of the various channels. And the figures here are more than clear. We can set the 'tipping point' for Germany in the year 2020 or 2021 (depending on the data source). Since this tipping point, *advertising companies have invested more in digital media than in all other analog media combined.*²

This insight comes as a surprise for many people. Most users would estimate the share of digital media to be lower. But, in fact, analog times are over.³ If you look at advertising as an indicator of bundled media attention, it has been true for several years: *Digital media are the leading media*. Analog media are now only of secondary importance. And they will continue to melt away. At some point, digital media will take over. And one thing is clear: it won't be long now.

There are a lot of explosive implications behind this finding. This is because many stakeholders in the media, business or politics still pay attention first and foremost to what happens in analog media. If you were to ask an editor at *Der Spiegel* (a leading political magazine from Germany) about his competitors, he/she would certainly point to *Focus*, *Die Zeit* or *FAZ* (other leading German print publications).

He probably would not say that Facebook and Instagram are the most dangerous competitors for *Der Spiegel*. But that's exactly the case. Let us think a few years ahead. If we ask which company could one day take so much attention away from *Spiegel* that it would be a matter of survival for the editorial team, then it is certainly not *Focus* or *Die Zeit*—but the competition from digital platforms.

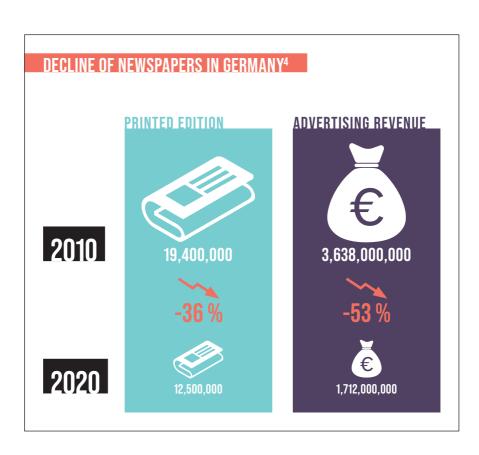
ADVERTISING ONCE HAD A GOOD PURPOSE...



Platforms are destroying the financial basis of journalism

There is another reason why it is interesting to analyze advertising investments. Advertising may be annoying and irritating for many media users, but they forget that the same advertising serves a 'good purpose' for our democracy. After all, it is the same advertising that enables media companies to finance editorial offices, create films, hire journalists and carry out research (see illustration on previous page).

This also gives us a first impression as to how the digital basis of our democracy could look in the future. After all, as we all know, the platforms' business model is based on 'user-generated content'—in other words, content that users create for them. The platforms commonly do not pay any fees, do not maintain editorial teams, they do not spend time and resources on research. They do not conduct interviews, analyze topics or investigate. They merely offer users a digital forum where they can disseminate their content as they wish. The only difference is that users do this work for platforms free of charge and receive no financial reward for it.



Anyone who thinks that it is not worth analyzing such advertising investments is mistaken because the privately organized media are dependent on this advertising, regardless of whether it is *RTL* or *Pro7* (Germany's biggest private broadcasting channels), *Der Spiegel* or the *Süddeutsche Zeitung* (large German print publishers). If advertising investments continue to migrate to platforms, then the analog and editorial media will inevitably 'dry up'. This is precisely what we have been observing for years and for decades: newspapers are dying, jobs are being cut in editorial offices, publishers are constantly restructuring, journalism is dying.

When will the editorial media collapse?

The question is at what point the analog media will have melted away to such an extent that they reach a second 'tipping point'. After all, in such processes of stagnation, the decline from a certain point onwards is no longer linear, but dynamic. This is the case with many economic business models. After a certain threshold, it is no longer economically viable to maintain a factory, for example. It is no longer profitable because the costs of production exceed the income. At this point, the owners will stop the business and close the production facility.

As we have seen, it has taken digital media more than three decades to achieve their current level of dominance. We can safely assume that the speed of their growth will advance in the future. We can see from the published predictions that digital media will probably bundle three quarters of all advertising investments in Europe by 2029 (in 2024, they were already at 63.3 percent). In contrast, the relative share of analog media will fall to less than 25 percent in 2029.⁵

This will be critical for analog media in three aspects. First, they will lose relevance for society as a whole. Second, many media companies will no longer be able to sustain themselves profitably. Closures, mergers, job cuts and restructuring will accelerate the erosion process. However, the third consequence is the most significant one. The loss of relative share of attention will mean that the editorial media will no longer be able to defend the media system against the hostile takeover of the platforms.

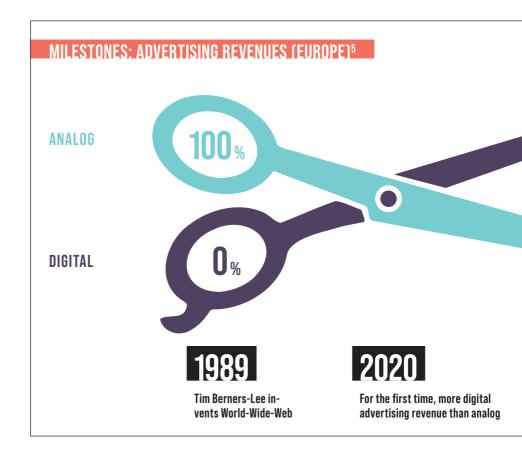
They never had the slightest chance in this battle. As we will see later (II), this hostile takeover by the digital corporations was carried out using unfair methods. Due to a regulation that massively privileged the platforms, all digitalization offensives by analogue media were doomed to fail from the outset. The only problem in 2029 will be that they will no longer have the necessary significance in society to publicly denounce this issue. Their 'share of voice' will then be too small.

Beyond the year 2029, corrections or changes of direction will be virtually unthinkable: GAME OVER.

One question is still open in our analysis: what exactly does this mean? Replacing analog media with digital media could also be a great thing. Incidentally, I am a 'digital addict' myself, and ten years ago I would probably have replied in a discussion on such topics:

"That's great! That's just part of progress—new ideas come, old ones go. What's wrong with that? Why do we still need analog media? Just bring on the cool new platforms and get rid of the old stuff."

But as we will see, it is not that simple. What exactly happens if we switch our our current democracy based on analog media to one based on digital media? What are the consequences if the platforms become the foundation of our democracy?



>75%

GAME OVER for the editorial media

<25%

2029

Three quarters of advertising revenue is digital