

Plat-Firming Welfare: Examining Digital Transformation in Local Care Services

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The Platform Firm: A Variety of Organisational Models

The birth of online platforms is transforming every sector of the economy and every facet of society from education to the media and from energy to personal services. The promulgation of notions like ‘platform logic’ (Andersson Schwarz 2017), ‘platform society’ (van Dijck, Poell and de Waal 2018), ‘platform capitalism’ (Langley and Leyshon 2017; Srnicek 2016) or, for the current context most aptly, ‘platform economy’ (Kenney and Zysman 2016; Kenney, Bearson and Zysman 2019) aims at indicating the novelty of an emerging socio-economic form of organisation (Grabher and König 2020).

The most widely shared definition sees the platform as a digital infrastructure that enables interaction between two or more social groups for the exchange of goods and services (Srnicek 2016); a more analytical definition is proposed by Grabher and van Tuijl (2020, 104) who define platforms as ‘programmable digital infrastructures controlled by platform operators who, as non-neutral intermediaries, curate the interactions of interdependent complementors and users’. Research on platforms has mostly been developed within

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the field of media studies, through the study of infrastructures characterised by programmability, connection and data exchange through digital applications. Platforms may be distinguished from infrastructure primarily by the latter feature:

unlike system builders, platform builders do not seek to internalize their environments through vertical integration. Instead, their platforms are designed to be extended and elaborated from outside, by other actors, provided that those actors follow certain rules. (Plantin et al. 2018, 298)

The emergence of platforms was initially linked to the tourism and transport sectors. More recently, this process has begun to spread into other sectors (Casilli and Posada 2019). Just as McDonald's became the symbol of globalisation (Ritzer 1993), Uber fulfilled the same role for 'platformization': the company's operating logic is being adopted in highly disparate sectors in a quest to create 'the Uber of...' a given sector. Concerns relating to the regulation of work in ridesharing/ridehailing platforms have focused attention mainly on issues in these sectors while aspects relating to the organisation of work and the social implications of the platform model have remained marginal, albeit with interesting exceptions, including Schor (2020), Frenken and Pelzer (2020) and van Dijck, Poell and de Waal (2018). The 'uberization' of the digital economy shows how platforms could embody a neoliberal subjectivity based on individual autonomy and proactive attitudes towards work and social life (Armano, Mazali and Teli 2020). Is this race towards 'uberization' also affecting welfare services? Are welfare platforms available for the last territory for neoliberal subjectivity to colonise? (Couldry and Mejias 2019b)

Our hypothesis is that the 'platform' is not neutral as regards the goods/services they act as intermediaries for. In particular, we would argue that: firstly, the welfare state has specific features that require the construction of organisational models at least in part specifically customised for individual service or for the sector (Flanagan 2019; Ticona and Mateescu 2018; Dupret 2017); and secondly, the users of welfare services have specific characteristics and needs, around which it is necessary to build a dedicated infrastructure.

Any digital transformation brings with it not only the risk of transferring into a non-material dimension what has always been tangible, but also the opportunity to target users previously excluded from the services provided. In traditional services, the main purpose of technology is to direct users' behaviour through standard processes, while in welfare services platforms, it should aim at enabling actors to participate in the design of the process, according to their degree of autonomy and capabilities (Fosti 2016). As welfare services become increasingly digitalised, citizens unable to use standardised digital technologies may start to face new forms of exclusion. When analysing the organisational models of welfare platforms, it is therefore important to take into consideration people's situated uses and practices (Oudshoorn and Pinch

2003), in order to understand how the design of novel digital tools at an institutional level could respond more efficiently to citizens' needs.

The adoption of this approach changes the analytical perspective; it is not a question of verifying the capacity of a sector to move according to an isomorphic logic along a 'platformization' process whose characteristics have been defined from the outside, but rather to investigate how able the sector is at building its own platform model. In this way, we want to observe how welfare platforms offer a novel type of welfare service governance and provision that does not replace the ones we know, but instead can support and integrate them, triggering the redesigning of services, organisation and governance.

Methods

The research was carried out through the analysis of the start-up, management and implementation of platforms as part of a series of community welfare projects. These platform projects were funded by the Cariplo Foundation in the Lombardy Region in Italy.

The territorial limitation of the research must certainly be taken into consideration when evaluating the results achieved. At the same time, literature on the platform model is predominantly based on examples from the United States and this study can contribute to the analysis of the role of local ecosystems in the spread of digital platforms and in their global and local variants. Furthermore, we believe that on this issue, the strong tradition of the Italian 'for benefit' sector can also provide an original contribution to the international debate.

The research focused on five projects: 'Mi fido di noi', a time bank for the exchange of goods and skills; 'La cura è di casa', which aims to provide tools for collecting reports relating to frail, elderly people and the preparation of Care Plans; 'Bacheca digitale', which collects services in the areas of housing, food, work and civic participation to make them available to social workers and direct beneficiaries of the project; 'Family Like' for matching supply and demand for services and events aimed at families with young children; and 'WeMi' which provides a single point of offering welfare services to the home.

The research path took its cue from the platform model as it was implemented in the private sector, and then differentiated with respect to the specificities of welfare, paying particular attention to the role of 'for benefit' and public entities. The objective was not evaluative, and the platform model developed in other sectors was not considered as an ideal end point for welfare. On the contrary, the five cases were used as prototypes to highlight the specific features of the welfare platforms with respect to the organisational model, platform design, operating logic, role of the community, ecosystems and skills of the operators. As an analytical framework, we used the Eurofound report (2018), which identifies 27 criteria for analysing platforms (in particular, for labour-based

ones), divided into five groups: the structural characteristics of the platform, the business model, accessibility to the platform, the matching process and the criteria relating to tasks commissioned through the platform. In the following discussion, we use this criteria to analyse the case studies and reflect more generally on the singularity of welfare platforms.

The empirical research was carried out through desk analysis of the platform design and interviews with the platform managers of these five cases in order to investigate in detail their project and their strategies for the implementation of the platform model. The research was carried out between May 2018 and February 2019. We believe that the results are particularly interesting today in light of the phase of social transformation related to Covid-19, which has accelerated the spread of digital services further into the welfare sector. Up until now, digital services have generally been aimed at people with high cultural capital. Following the lockdown (March–May 2020), however, larger sections of the population have begun to expand their use of digital tools, widening the target of digital welfare services and leading to changes in the organisation and design of these services.

Findings: The Emergence of Quasi-Platforms

The analysis of these welfare platforms revealed a gap compared to the standard platform model, that is partly constitutional and not dependent on the evolutionary stage of the platforms being analysed. The most widely known examples of the platform economy mainly follow market logic, not hiding their extractive purposes. The platforms in the field of welfare, on the other hand, offer alternative paths, beyond the public/private dichotomy, rooted in the ‘foundational’ value of services (Barbera et al. 2015) and intended as a daily infrastructure, but also serving as a bridge to a reconnection (and hybridisation) between existing forms of exchange and value creation.

The platform model in welfare takes on traits that we have summarised as *quasi-platform*, a term that does not indicate the failure to achieve an ideal model but that recalls the literature on welfare *quasi-markets* (as well as that on quasi-unions¹) (Gori 2014). As in *quasi-markets*, even in *quasi-platforms*, competition is not necessarily driven by the motivation to generate profit and is attenuated thanks to the introduction of authorisation and accreditation systems; furthermore, there may be the commitment of public resources but unlike *quasi-markets*, the purchasing power is mostly in the hands of end users.

This is the trait that most distinguishes *quasi-platforms*. Whereas the platform model is based on users’ autonomy and in the traditional welfare model the institution acts as client on behalf of the end user, in quasi-platforms the user is able to use the services, but their agency is supported and conveyed by intermediary organisations. In addition, the platform allows organisations certified through the public accreditation system to offer the same (or similar)

services on the market, directly addressing end users. The following table provides a summary of the ideal-typical characteristics that emerged from what we have defined as the *quasi-platforms* model, compared both with the platform model and with traditional welfare services.

Table 14.1: Platforms, Quasi-Platforms and Welfare Services: A Comparison.

	<i>Platforms</i>	<i>Quasi-platforms</i>	<i>Welfare services</i>
<i>Governance</i>	Coincides with the platform	Exceeds the platform and the policy scope	Coincides with a (social) policy scope
<i>Geographical distribution and size</i>	Reproducibility of the business model	Territorial roots of the offer system (partly transferable)	Customisation of the service model
<i>Market positioning</i>	Open but with a tendency to monopoly	Market encapsulation, with pushes to open	Oligopoly through accreditation systems
<i>Business model</i>	Venture capital percentage on the transactions	Philanthropy subscription	Public redistribution. Cost sharing (by users)
<i>Data</i>	Private property (sale)	Commons (for policy making)	Public (monitoring, evaluation)
<i>Users</i>	Open access	Open access for users only	Closed access
<i>Task complexity</i>	Unbundling of tasks	Supply chain with differentiation between operators and volunteers	Specialisation of the service and user segmentation
<i>Social risks</i>	Indirect/market protection	Detection and response to new social risks	Advocacy on needs and policy implementation
<i>Matching supply/demand</i>	User's choice through the mediation of the algorithm	Mix between organisational mediation and service evaluation	Prevalence of organisational mediation
<i>Reputation systems</i>	Opaque algorithms	Supply: integration with accreditation systems. Demand: social scoring linked to activation mechanisms.	Supply: external assessment of the quality of services. Demand: evaluation of direct or indirect users.

A central point concerns governance, which in the platform model coincides with the platform itself since the platform has an autonomous legal form. In all the cases examined, the platform is not a company, it has no autonomous legal nature; it is promoted and managed by a public administration, or by a third sector organisation, or by a network of associations.

In our cases, in three of the projects the platform is owned by the local administration ('WeMi', 'La Cura è di casa' and 'Bacheca Digitale'). In all these cases, the owner is therefore different from the operators and, at least for the moment, only accredited operators have access to the platform. For Family Like, the platform's credits are held by a cooperative: the platform is therefore owned by an operator but open to a network of operators who can publish their own content. Finally, 'Mi fido di noi' is the platform of a District of Solidarity Economy (Brianza in Lombardy) and therefore owned by a network of operators and is open for citizens to use in order to exchange time, skills, information and material goods. In this regard, quasi-platforms also go beyond the vertical governance of local welfare systems centered on relatively limited social policies. While the organisations using the standard platform model are mainly start-ups, quasi-platforms are more frequently part of an organisational transformation process.

As regards geographical distribution, conventional platforms are based on economies of scale (*scaling wide*). This dynamic generates *winner-takes-all* mechanisms, which lead to the creation of monopolies. In all our cases, the geographic distribution is currently only local but it is interesting to also consider the potential of platforms for the construction of long networks and wider markets for services that have traditionally been organised – and not only provided – at local level. In quasi-platforms, 'deep scaling' logics, based on the local adaptability of mechanisms that have proven their effectiveness elsewhere, could also prove to be effective here (Bloom and Chatterji 2009). This can happen by means of different strategies: the repositioning of the platform in a multi-local key, leveraging the transfer of skills acquired in the 'pilot area' in particular with regard to the enhancement of the offer and community building actions; the adaptation of non 'site specific' platforms (for example corporate welfare) to the characteristics of the context, for example through the involvement of local providers; or the construction of clusters by suppliers according to a multi-homing strategy.

The need to quickly reach many users leads platforms to make significant investments in marketing, supported through venture capital. Once fully operational, platforms usually take a percentage of transactions and sell data. In quasi-platforms, initial investments are lower and are mainly supported by philanthropic investments. In all the observed cases, the projects have not yet reached financial sustainability: the number of users is limited, and this does not allow the adoption of business models based on fees on transactions. For this reason, the platforms seem to exclude models based on user payment. The

only exception is ‘Mi fido di noi’, which requires annual membership to the Solidarity Economy District (10 euros).

‘Bacheca digitale’ and ‘Family Like’ offer a bulletin-board of services and transactions take place directly between the user and the association/organisation. The ‘WeMi’ case is particularly interesting for two reasons. Firstly, that operators accustomed to working only with the public administration have instead turned directly to the end user for the first time, with consequences for price formation mechanisms. Secondly, by showcasing the prices of the services, the platform has created a competition mechanism amongst operators.

‘Mi fido di noi’ is the only platform where payment is made directly on the platform, using a complementary currency, called ‘Fido’. It is interesting to note that while using only time as a criterion for defining the value of the service, the assessment of the value of the ‘fido’ was parameterised to the cost of labour (one hour = 10 fido = 10 euros). The criterion relating to market positioning must necessarily be redefined in platforms that act mainly in the context of redistribution. As we have seen, if the platform model were to be adopted, some cases examined could move in the direction of hybridisation with market logic and enter a sector already occupied by private platforms – for example ‘WeMi’ operates in the same field as private platforms for babysitting or caregivers.

The sector is, by definition, one of welfare, with some specific characteristics: projects that see the direct involvement of local administrations are more oriented towards social services, even at a low threshold (home services for ‘WeMi’; services for the elderly for ‘La Cura è di casa’; services for home, work, food, participation for ‘Bacheca digitale’), whereas the other two projects are oriented towards a type of service which is less assistance-oriented (support for parenting for ‘Family Like’; exchange of services/skills/knowledge for ‘Mi fido di noi’). Platforms that allow for the provision of services insist on incorporating welfare dimensions but do so within a market logic. One of the most interesting aspects of quasi-platforms is that – whilst organising the provision of services to protect against traditional risks – they can detect new social risks. This is a potential competitive advantage even as regards traditional welfare systems, where the response to risk sometimes appears slower, moving from advocacy action that only later turns into a standard offer of services.

The matching of supply and demand on platforms is entrusted to users in a negotiation between the parties mediated through an algorithm, which is generally not transparent. In welfare quasi-platforms there is a form of mediation by the organisations that deliver the service. This is due both to the adoption of supply accreditation mechanisms and, on the demand side, to the use of social scoring mechanisms linked to user activation logics (albeit still functioning in an embryonic stage in the projects examined), which are intentionally absent in the traditional welfare system.

As for data protection and management in the platform model, access is open and profiles are visible to both sides. In quasi-platforms, the operators' accreditation system and the protection of users' privacy lead more often towards more closed and anonymous models, even if there are pressures in the direction of open processes, especially when services do not involve fragile users. Currently, the only platform that allows access to service users is 'Mi fido di noi'; it is a peer-to-peer platform with user profiling, but the information is accessible only to members using a 'club' logic (Buchanan 1965). On the other platforms, operators log in with an organisational profile, not linked to individual identity. An exception is 'La cura è di casa', which provides an individual profile for each operator but information is protected with levels of visibility consistent with the operator's profile.

The platforms divide up complex tasks, also segmenting them into micro-activities; on quasi-platforms this process is less evident. In the logic of a 'pure' platform, there is no selection of service providers based on skills or professionalism; everyone offers what they can and they are evaluated on results in terms of customer satisfaction. In an area such as social services, platforms (or quasi-platforms), on the contrary, incorporate the professional logics of the relevant sector. In 'La Cura è di casa' there is a division of labour between simpler tasks attributable to volunteers (also on the basis of their preferences) and more complex tasks reserved for professional operators.

Matching up is the platforms' core activity and additional services vary according to the service offered; among the most common are insurance and pre-screening but they are generally limited. A more specific element of quasi-platforms is the investment in training, especially of operators and users including in 'educational' terms (culture of use, consumption behaviour, etc.), with even higher levels of intensity than in traditional social welfare systems. This path is considered functional to the success of organisational transformation processes, though it is less necessary in market platforms, where users select themselves according to their needs and skills.

Furthermore, platforms enable digital communities, which generally correspond to a low sense of belonging and where the building up or strengthening of social capital is a by-product of other processes, activated mainly for instrumental reasons. They often take the form of a brand community, especially when users perceive the related services as part of an innovative lifestyle. In the case of traditional welfare systems, the community relationship is significant, incorporating not only those of a professional nature, but also, in a broader sense, the social aggregations that carry out advocacy action regarding the quality of services and the innovation of responses to old and new needs. Quasi-platforms, at least in this initial phase of their life cycle, are based on the central role of the communities of practices of professional operators of social services that work to respond to specific needs. Automation and algorithmic management assume peculiar features in quasi-platforms: welfare platform managers refuse to lose control over key processes (such as selection and matching, performance

control and assessment, or knowledge sharing) and this reduces the occurrence of the phenomena of ‘machinic dispossession’, a concept introduced by Delfanti (2019) to identify the tendency to expropriate the knowledge of workers and incorporate it in machinery such as computer programs. In our case studies we did not find any significant process of knowledge and expertise transfer from humans to machines. In particular, the platform managers claimed they were able to maintain stronger control in the transition to platform organisation and avoid the most disruptive forms of algorithmic management. They viewed the idea of disintermediation as not entirely applicable or even desirable for the welfare sector. They focused more on the importance of continuous mediation and tuning into the needs and practices of the operators and volunteers that operate in direct contact with the beneficiaries of care services.

Finally, as regards the ecosystem of digital platforms, it is often a largely artificial construction aimed at safeguarding the competitive advantage of the platform, for example through the colonisation of other networks in order to guarantee the diversification of the business model and, at the same time, the dominance of one’s own network. In the case of quasi-platforms, ecosystems refer to a more ‘generative’ logic linked to the growth of new initiatives that do not necessarily pertain to this infrastructure, but which nevertheless contribute to creating favourable conditions in socio-cultural and political terms, notably for the development of this sociotechnical innovation. This is a further evolutionary stage indicated even with respect to traditional welfare systems in which the ecosystem ‘agglutinates’ to a great extent around the governance of a policy which, as mentioned above, concerns a sectoral and territorial policy. In fact, the quasi-platform model not only acts as a ‘reforming’ element of the classic welfare system, but, moreover, can try to intercept needs and resources that for a variety of reasons escape the purview of the current structure (Fosti 2018).

Conclusions

In conclusion, we have established the variants of the platform organisational model, starting with the welfare sector which, due to the characteristics of the goods/services provided and the specific nature of the users, can be considered an extreme case compared to what is considered ‘standard’ in the platform model. Our analysis confirmed the distinct nature of welfare platforms, which can be traced back to some common elements that we have summarised as ‘quasi-platforms’: a form of governance that goes beyond the platform, the territorial roots of the supply system, encapsulation in the market, business models based on philanthropy or subscriptions, and featuring instead data as commons, a differentiation in the tasks of volunteers and operators, a matching based on a hybrid between organisational mediation and evaluation of the service and reputational mechanisms integrated with accreditation systems. This analysis

is rooted in a broader debate about the social model that has underpinned European welfare states since the Second World War and the identification of the guiding principles of a 'digital welfare state' for the twenty-first century (Huws 2020).

Platformization is often associated with processes of commodification of care work. In the Lombardy Region, where the case studies examined are located, this would seem to be continuous with a process of privatisation of the public care service which, as demonstrated by Muehlebach (2012), has also determined 'the emergence of a new mode of social and moral subjectivity, new assumptions about citizens' rights and duties, and new conceptualisations of human agency, affect, and will' (17). However, we analyse digital platforms not only as a problem – because they exacerbate the problems of fragmentation of labour and poor social protection – but also as a possible solution. The cases presented here move towards those that Ursula Huws (2020) has defined 'digital platforms for public good', referring to the use of new digital technologies 'not just to enhance and expand existing welfare services but also to bring into being entirely new services that can contribute to the development of a new kind of welfare state' (147). These are local experiments, or pilot schemes, similar to those presented by Cottam in her book (2018), which – albeit in an embryonic form – show new possibilities and offer new discourses on the future of the welfare state.

The projects examined concern very 'tailor-made' experiences and structures dealing with precise objectives and territories. This is a choice that characterises the quasi-platform model but which in itself does not exclude the possibility of transferring it to other contexts by proceeding through locally rooted mechanisms. This model which, as we have seen, is characteristic of local platforms exhibiting strong hybridisation between market logics, redistribution and reciprocity, can therefore be analysed in more general terms and could be adapted to different sectors or socio-economic contexts. As for the limitations of the research, in addition to those relating to sampling, it is useful to remember that this analysis was carried out starting with the functionality of the sites studied and interviews with the designers and managers of the platform, whereas the implications for users were identified indirectly. It is hoped that these first results will stimulate further research, aimed at verifying the stability of the hypotheses formulated here in other sectors and territories and investigating more directly the consequences in terms of subjectification processes.

Note

- ¹ Quasi-unions are organisations that have emerged to represent the interests of otherwise unrepresented people in their work lives and in their relationships with their employer. They have a distinctive approach and play a key role in domains where traditional trade unions have not been very active.

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