TIKTOK ONE AS A SUPER TOOL SUITE: PLATFORM POWER AND THE DISTRIBUTION OF PLATFORM TOOLS

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Introduction

In May of 2024 the platform company TikTok Ltd. released TikTok One: "a centralized destination for marketers to access […] creative tools" (TikTok 2024). TikTok One is not the first nor is it unique in offering a centralized collection of software resources for content creation and advertising. Competing platform company Snap Inc., for instance, introduced its Creator Marketplace in 2021 (Perez 2021), and Meta Platforms Inc. followed suit shortly after for Instagram in 2022 (Instagram 2022). On the surface, TikTok One resembles these competing services; all three distribute software resources with comparable use cases through similarly designed interfaces. But a closer review suggests that the Creator Marketplace from Snap Inc. and that tied to Instagram more closely resemble TikTok Ltd.'s 2019 Creator Marketplace, not TikTok One.

This paper argues that TikTok One is of a different magnitude infrastructurally when positioned against competing offerings and within the longer timeline of TikTok Ltd.'s tools. We demonstrate that TikTok One is indicative of how TikTok Ltd. operationalizes market power and infrastructural power through the strategic distribution and governance of its software resources. TikTok One is emblematic of an increasingly common strategy in the platform economy in which platform companies amass tools to group into tool suites, and then aggregate further into suites of tool suites—or what we later conceptualize as "super tool suites" (Figure 1).
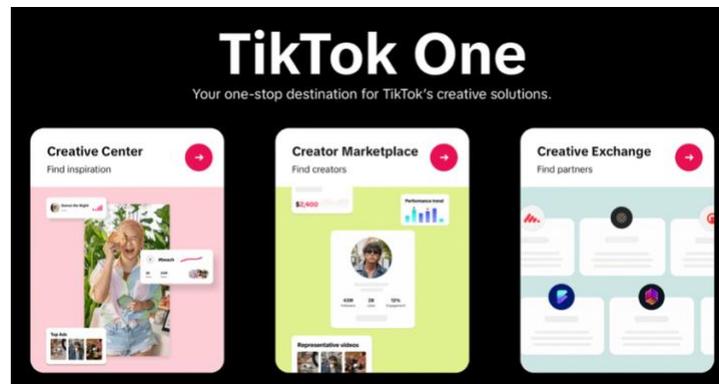
Figure 1. Combining three platform tool suites—i.e., the Creative Center, the Creator Marketplace, and the Creative Exchange, to form TikTok One—a "super tool suite."

Theorizing the multisided market in relation to platform tools
This article builds on previous platform literature that illustrates how platform companies regulate software resources such as application programming interfaces (APIs) and software development kits (SDKs) to extend their business logics within and outside the cultural industries, in markets and as infrastructure (van der Vlist et al. 2022; Blanke and Pybus 2020; van der Vlist et al. 2024). Much of the extant critical platform scholarship on software resources concentrates on a single platform user group, typically developers. We respond by broadening the existing scholarship to consider how platform power is shaped by a broader range of software resources, including those intended for cultural production and advertising, not just development. To do so, we make the object of study the more general category of software resources that are infrastructurally integrated with platform companies, or what in previous work we define as "platform tools" (Mahetaji and Nieborg 2024; 2025). This more expansive focus is useful because it understands that software resources are built and organized in "relational" environments, meaning they inform and are informed by interactions between many highly distributed platform user groups, not individually determined by developers (Eaton et al. 2015). This relationality becomes evident when the platform is defined as operating a "multisided market" (Rochet and Tirole 2003).

The term "multisided market" refers to a business model in which a platform company mediates interactions between two or more user groups, adopting the role of "matchmaker" (Rochet and Tirole 2003; Evans and Schmalensee 2016). Marketers, content creators, and end-users are just a handful of the many groups that are brought together or "matched" by TikTok Ltd. TikTok Ltd. connects marketers looking to produce ads with content creators using the company's shortform video production app TikTok. Content creators then develop sponsored content using input from marketers. The platform then connects creators with end-users who view the sponsored content through the TikTok app. This scenario suggests that TikTok Ltd.'s many user groups are interdependent; they rely on one another for resources, engagement, visibility, and other criteria associated with platform success (Foxman 2019; Scolere et al. 2018). TikTok Ltd. leverages the dependencies user groups form with other user groups and its platform ecosystem for financial gain.

The multisided market underscores the relational setting in which platform tools are managed, but for the most part, the multisided market is mainly understood as a business model. In this study, we investigate the relationship between the platform as a multisided market and its platform tools, which has yet to be explored. The multisided market is a useful point of critical inquiry because it explains how companies prioritize their user groups, make decisions, compete, remain financially viable, adapt, and scale. These insights ultimately divulge how platform companies achieve market power. By adding the question of tools, we simultaneously interrogate how platform companies devise multisided markets to accumulate infrastructural power.

Mapping TikTok One as a super tool suite for tool-mediated platform growth
We conduct a systematic infrastructural analysis of TikTok One, positioning ourselves as business entities to collect data from May of 2024 (TikTok One's introduction) to May of 2025. As of this date, TikTok One is not available globally. We note the regional variation and gather data from a Canadian IP address. Drawing on the "platform historiography" approach, we contextualize TikTok One within a longer history of tool changes, consulting platform documentation, news articles, and trade reports (Helmond and van der Vlist 2019). We qualify each tool that emerges as (1) a discrete "tool," (2) tools intended for a similar use case or one user group distributed together as a collection—a "tool suite," or (3) a collection of tool suites or "super tool suite" (Figure 2).
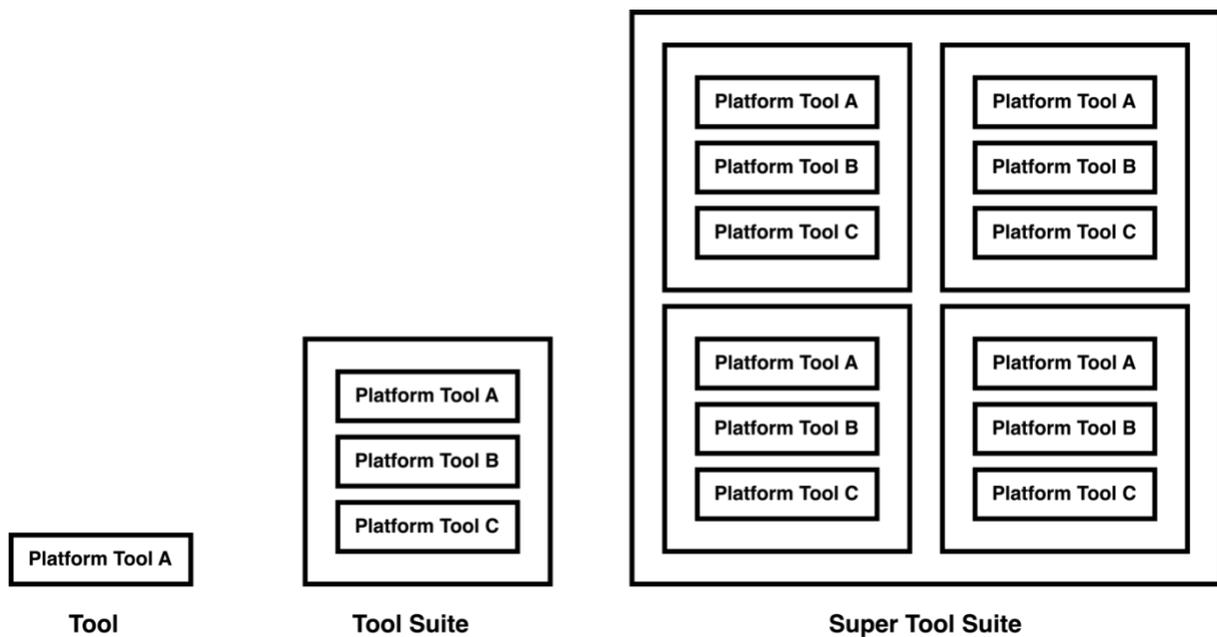

Figure 2. Examining infrastructural trends in platform tools managed by TikTok Ltd.; TikTok Ltd. builds up its tools from discrete tools to tool suites to super tool suites.

The exploratory analysis (Figure 3) indicates that TikTok One supports TikTok Ltd.'s rise by contributing to the company's growth as a "multisided market." TikTok One does so by (1) increasing the number and diversity of user groups ("sides") and (2) increasing the number and kinds of interactions between the different platform user groups. First,

TikTok Ltd. integrates generative artificial intelligence (AI) tools and tool suites into TikTok One. The incorporation of AI seemingly "democratizes" cultural production and advertising, incentivizing more users to join, from creators to developers. Concurrently, TikTok Ltd. increases the number of "sides" or the breadth of its user groups. Through TikTok One, the platform company makes tools marketed toward creators available to advertisers, encouraging advertisers to take on creation tasks usually within the purview of creators. Here, the company resists set definitions for its user groups, nuancing the notion of the creator. Second, TikTok Ltd. through its super tool suite facilitates new transactions in the multisided market. The Creative Center, the Creator Marketplace, and the Creative Exchange contained within TikTok One initiate exchange not only between TikTok Ltd. and its immediate user groups but TikTok Ltd. and other corporate entities and its parent company ByteDance Ltd. and its subsidiaries. When reviewing these patterns over the course of TikTok One's lifespan, it becomes evident that the super tool suite continues to expand, encompassing more users, more types of users, and more interactions between users.
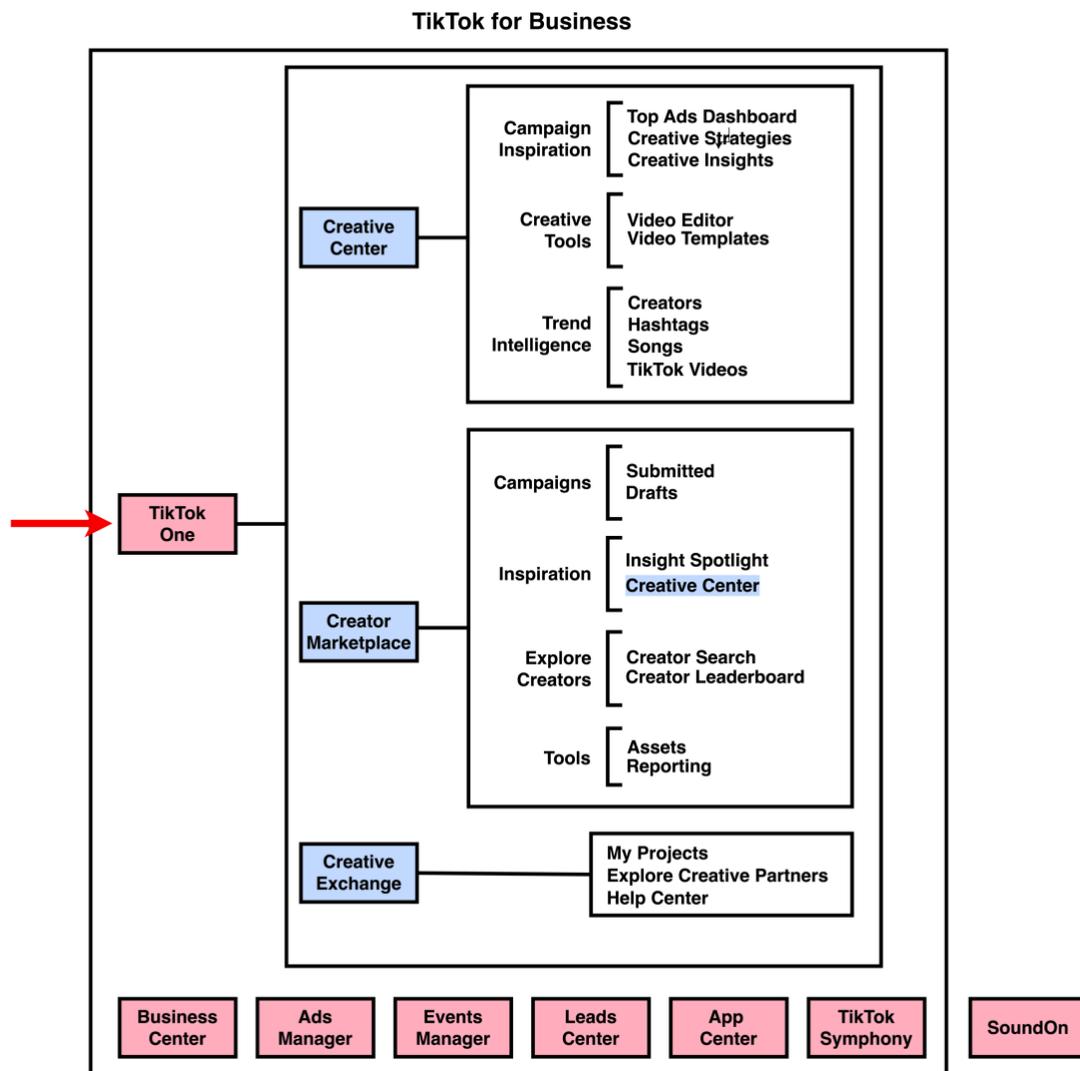

Figure 3. Pointing to TikTok One as a "super tool suite" (pink) managed within the TikTok for Business platform with other super tool suites. Super tool suites contain tool suites (blue).

TikTok Ltd.'s tool-based strategy for growth signals a rupture in which platform companies, previously fixated on social graphs and data, are investing heavily in not only the development of platform tools but the centralized distribution of highly integrated and all-encompassing super tool suites. Such comprehensive infrastructure makes disconnection difficult, encouraging creators and other platform user groups to become and remain dependent on the platform company's software ecosystem.

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