

Indonesia - Media Landscape

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Table of contents

- Introduction
 - Media
 - Print
 - Radio
 - Television
 - Digital Media
 - Social Networks
 - Opinion Makers
 - Sources
 - Organisations
 - Trade Unions
 - Journalist Associations
 - News Agencies
 - Audience measurement organisations
 - Sources
 - Policies
 - Media legislation
 - Accountability systems
 - Regulatory authorities
 - Sources
 - Education
 - Universities and schools
 - Professional development
 - Sources
 - Conclusions
 - 5.1 Conclusion
 - 5.2 References
-

Overview

Located in Southeast Asia, the Republic of Indonesia is the fifth most populated country in the world, with more than 260 million inhabitants. Indonesia is also a multi-ethnic country with approximately 1,340 ethnic groups and has the largest

Muslim population in the world.

The media landscape cannot be separated from the experience and history of press freedom in the country. Media were once under tight control under President Soeharto, in the time known as the New Order Era (1966-1998). At that time, a special permit called *Surat Ijin Usaha Penerbitan Pers* (Press Publishing Business License - SIUPP) was necessary to establish a media outlet. The government was also able to censor and ban any media considered to be against the government. To be a journalist, a special permission was also required. After the reign of President Soeharto (post 1998), Indonesia gained some press freedom. As of today, there is no special permission to establish media outlets and become a journalist.

This resulted in the birth of a lot of media. By 2017, the *Dewan Pers* (Press Council) estimated that the number of media in Indonesia reached 47,000 outlets. Of these, as many as 2,000 are printed media, 1,166 radios, 674 televisions and 43,300 online media. The large amount of media is not followed by the level of media professionalism. Only a few healthy media are able to run regularly, to attract advertisement and to pay salaries. A verification of media companies conducted by the Press Council found that only 321 print media (about 16 percent) qualified as professional media. For online media, those recorded as a professional media only amounted to 211 outlets, 0.5 percent of online media available. As a conclusion, the condition of media in Indonesia varies, as there are both professional and non-professional media. By 2017, the Press Council estimated the number of media journalists in Indonesia to reach 100,000 people. Of these, according to the Press Council, only 11 percent can be categorised as professional journalists. Similar to media conditions, journalists in Indonesia are also diverse, there are professional, certified journalists and others who are in the profession without a specific education. The diversity is based on the ease of establishing the media or becoming a journalist.

Indonesia is experiencing the emergence of media conglomeration, with 12 major media groups. According to Nugroho et al (2012), in total, 12 media groups have 60 televisions, 317 print media, 66 radios and 9 online media. The largest media groups are Global Mediacomm (MNC), Jawa Pos Group, and Kompas Gramedia Group (KKG). MNC Group has 20 televisions, 20 radios, 7 print media and 1 online media. The Jawa Pos Group has 20 televisions, 171 print media and 1 online media. While KKG has 10 televisions, 12 radio, 88 print media and 2 online media.

According to data from the Ministry of Communications and Information (2015), as many as 86.7 percent of households have a television set. The same data also shows that as many as 89.6 percent of Indonesians regularly watch television whether for entertainment or information. Although Internet changed the media environment, television is still estimated to be the main medium for several upcoming years. The domination of television is inseparable from the large number of television audience and the capability of television in gaining advertisement. According to Nielsen, in 2017, the total advertisement expenditure of media (gross number, excluding discounts and promotions), reached IDR145.5tn (US\$10.6bn), 80 percent of which was taken by television. Another traditional medium that still survives after the presence of Internet is radio. The total range of income from radio advertisement is only IDR2tn (US\$14.3 million). Nevertheless, radio is relatively able to be operated with cheaper production costs compared to television and printed media and to easily adapt to the presence of Internet.

The traditional medium that underwent the greatest direct impact of Internet was the print press. In the last five years, tens of printed media stopped publishing. The reason was the high printing cost, while it was impossible for the media to increase the subscriptions. As more printed media stopped publishing, online media increased in numbers. Nevertheless, the presence of online media does not merely replace the existence of the printed media. There are two reasons why. First, online media have not been able to attract advertisement. According to *Tirto.id* (2018), the advertisement market of online media is still small. Most of the digital advertisement went to search engine advertising and social media for a total of US\$888m. The digital advertisement benefits Facebook and Google, not other online media. *Tirto.id* interviewed leaders of several printed media who also have an online version and found that the main income is still generated by the printed versions, not the online ones. Second, the quality of journalism of online media is worse. In February 2017, in a report on online media, *Tirto.id*

found that there was a difference in quality between the printed media and the online media. The writing for the printed media was conducted with the higher standards. On the contrary, online media relied more on the speed and the number of clicks from the visitors. Unsurprisingly news coverage from online media resulted as problematic because of the lack in fact checking. The future of online media in Indonesia is determined by the grade of ability in solving the above problems.

There is no exact data on the number of journalists in Indonesia, as it is not mandatory to register as a journalist. In 2017, the Press Council estimated 100,000 journalists.

The government is a regulator in the matters of administration and infrastructure of broadcasting, including the matters of licensing. In addition to being the regulator of broadcasting, the government also handles the regulation of digital media.

Media

Print

The abundance of print media in Indonesia is due to the lack of limitations in establishing a print outlet. According to the record of *Serikat Penerbit Surat Kabar* (Association of Newspaper Publishers - SPS), in 2017, totally, there were 793 printed media with a total of 172 daily newspapers published. Of these 793 printed media, as many as 399 are newspapers (with a circulation of 7.1m), 67 weekly newspapers (circulation 174,000), 194 magazines (circulation 6.4m) and 133 tabloids (circulation 3.4m). The number of printed media is decreasing. In 2011, the total number of printed media was as many as 1,361 outlets. In a period of time of 6 years, as many as 568 printed media stopped publishing, with 793 still active. The circulation of newspapers also decreased from 25.2m copies in 2011 to 17.2m in 2017.

The large number of printed media does not reflect the actual number of newspapers circulating in the market. These data only describe the number of printed media that have a permit. There are many printed media that do not publish regularly. In 2010, Leo Batubara, former member of the Press Council, estimated that only 30 percent of the existing printed media was healthy when viewed from a business perspective. Being healthy in business is measured from the ability of the printed media to publish regularly, to pay the journalists routinely and also to obtain permanent income from advertisement. From the 793 printed media, most of them did not publish periodically.

More real data concerning the number of printed media was revealed by the Press Council. In 2015, the Press Council conducted a data collection on the printed media by using the indicator of publishing regularity. The result was that the number of printed media was 321, of which: 177 were daily newspapers, 112 weekly newspapers and 32 monthly newspapers. Data on the number of printed media from the Press Council is much different from the SPS data above. The difference is explained by a different method of calculation. SPS calculated the printed media which continued publishing, meanwhile, the Press Council's calculation is based on the media that published regularly (periodically). From 321 printed media in Indonesia, most of them (113 media or 35 percent) were published outside Java Island.

The 321 printed media are grouped into several publishing conglomerations. There are 8 groups of big publishers: Kompas Gramedia Group (81 printed media); Jawa Pos (122 printed media); Femina (11 printed media); Bali Post (7 printed media); Pin Point (14 printed media); Pikiran Rakyat (8 printed media); Bisnis Indonesia (7 printed media), and Suara Merdeka (5 printed media). The eight publisher groups have 222 printed media which equals 79.5 percent of all printed media in Indonesia. Only 20 percent of the printed media have no affiliation to publishing groups.

Of the 8 publishing groups, the two largest are Jawa Post and Kompas Gramedia. Jawa Pos has many local printed media outlets using the name "Radar". Meanwhile, Kompas Gramedia has a network of local printed media in many regions using the name "Tribun". The emergence of publishing groups is inseparable from the efficiency pretext and to outsmart the narrow niche market. These publishing groups have a business network from the upstream into the downstream, that makes the production cost of the printed media more efficient. Take Jawa Pos group network as an example. Jawa Pos owns PT Temprina Media Grafika that manages the publishing units in 29 cities. For paper, Jawa Pos has PT Adiprima Suraprinta, which is able to produce 100 tons per day. Meanwhile, for the news, Jawa Pos has Jawa Pos News Network (JPNN). This news network contains news resulted and managed by the journalists of Jawa Post and Jawa Post subsidiaries widespread in regions. Jawa Pos Company serves the needs of media in regions, starting from the publishing machinery, paper supply, ink, up to the news. With the pattern of news exchange, practically, 70 percent of the newspaper news is supplied from JPNN. The local newspapers do not necessarily recruit journalists in a large number. Through the vertical support, the local newspapers belonging to Jawa Pos can be present with a lean organisation.

Advertisement of printed media is stagnant. According to data from Nielsen, in 2017, the advertisement segment of printed media reached 19 percent of the total advertisement expenditure of media in Indonesia. In 2017, the total advertisement of printed media (gross amount, not yet reduced by discount) was IDR28.5tn (US\$2.1bn). This figure was obtained by Nielsen by calculating the advertisement from 99 printed media. There was a slight decrease in the printed media advertisement, from IDR31.6tn (US\$ 2.3bn) in 2013 into IDR 28.5tn (US\$ 2.1bn) in 2017.

The competition of printed media gets more tight. Besides the advertisement market that did not grow, the main competitor of printed media is online media that makes news access free of charge. As a result, the printed media don't increase the selling cost because they would be abandoned by the readers who turn to online media. Nevertheless, in another aspect, the printed media also cannot survive by relying too much on the income from advertisement that did not grow in the last 5 years. Not surprisingly, every year there are printed media forced to stop publishing. In 2015, as many as 8 printed media closed down (*Sinar Harapan, Trax, Harian Bola, Jakarta Globe, Koran Tempo Minggu, Sekar, Animonster and Jurnal Nasional*). In 2016, there at least 11 more were forced to do the same (*Girls, Horison, Cita Cinta, Kawanku, Chip, Sinyal, Chip Foto Video, What Hi Fi, Auto Expert, Car and Turning and Motor*). In 2017, as many as 5 printed media stopped publishing (*FHM, Maxim, Fortune Indonesia, Bloomberg, Tabloid Gaul, Cosmogirl Indonesia*). Some of these printed media moved to having only an online version, but some of them vanished completely.

Radio

Radio is one of the most popular media in Indonesia, and is broadcasted everywhere in the country. A survey conducted by Nielsen Media Research in 2012 revealed that the penetration of radio was still relatively high. A more recent research by Price Waterhouse Coopers forecasts a 4.5 percent growth of radio between 2016 and 2021, compared to a global average of 2.1 percent. In Jakarta, Bandung, Medan and Surabaya cities, the range of people who listened to radio was 50 percent. Meanwhile, in other cities such as Denpasar and Palembang, the percentage of people listening to radio was above 80 percent.

The presence of digital media doesn't make radio vanish because the latter can easily adapt to them. Actually, Internet is for radio a platform allowing to reach a larger audience. In 2016 a study of Nielsen Radio Audience Measurement revealed the endurance of radio in facing the development of Internet. The study revealed that 4 of 10 people listened to radio via a mobile phones and that radio is no longer listened to via tape only. Recently, the behavior of listeners has changed into prioritising technology and flexibility.

Radio listening time per week grows from year to year. In 2014 Indonesians spent 16 hours per week listening to radio, a figure which continued to increase in 2015 (16 hours and 14 minutes per week) and in 2016 (16 hours and 18 minutes). The assumption that radio is only listened by the older generations is contradicted by the findings of Nielsen Radio Audience Measurement. The result of the survey revealed that 57 percent of radio listeners were relatively young future consumers.

There are two kinds of radio in Indonesia: private/commercial radio and community radio. Till 2012, according to data from the Ministry of Communication and Information, there were a total of 1,368 radios. As many as 1,305 were private radios and 63 were community radios. In the same year the calculation by *Persatuan Radio Siaran Swasta Nasional* (Association of National Private Broadcasting Radios - PRSSNI) gave a lower figure of 845 radios. This difference can be explained because the data from the Ministry of Communication and Information calculated the permits issued for radio broadcasting. Meanwhile, PRSSNI calculated the radios that really conducted broadcasting (really operational).

Similar to the printed media, a concentration of radio ownership occurred in Indonesia. In 2012, referring to the data from PRSSNI, as many as 222 radios (26.3 percent) were owned by 26 radio network groups. Radio ownership networks tend to consist of a small number of radios. The biggest radio networks are CPP Radionet (40 radios), Bonsita Group (24 radios), Masima Media Investama (14 radios), Volare Group (14 radios) and Suzanna Radionet (12 radios). All other groups only have less than 10 radios. Also, while the ownership groups of the printed media are centralised in Java, the ownership groups of radios are widespread in many regions. One must also quote Kantor Berita Radio 68H (KBR68H), a news agency and network serving several local radio stations.

The high number of frequencies issued, both analog and digital, has resulted in over-saturation of the market and in cases of corruption.

Television

Despite the recent growth of digital media, television is still the most popular medium. In 2016, data from the Central Bureau of Statistics (abbreviated in Indonesian as BPS) revealed that most of the population, as many as 91.5 percent, watched television. Television is still also the medium with the largest advertisement share. In 2017, according to the record of Nielsen, the advertisement segment of television reached 80 percent of all media. Of the total amount for 2017, TV advertisement (gross amount) was IDR115.8tn (US\$ 8.4bn).

Indonesia recognizes 4 kinds of televisions, they are: public television (public institution with educational content), private television (commercial entities broadcasting commercial programmes), community television (serving a specific territorial or business community), and subscribed television (with audiences subscribing a fee). Up to 2012, according to data from the Ministry of Communication and Information, there were 459 television stations, of which 12 were public, 212 private, 11 community stations and 124 subscribed televisions. The data referred to the amount of televisions owning a permit approved by the government, a figure which might not always reflect the actual number of local television stations. That is because there are some stations that are not operational even if they are approved (for example they only did a trial broadcasting, only prepared tools, etc).

For more than 30 years, television was entirely controlled by the government, *Televisi Republik Indonesia* (TVRI), operating since 24 August 1962. The funding of TVRI derived from the government budget and the audience contribution. Advertisement was prohibited. Generally, TVRI only broadcasted biased information on the government's activities. In 1989, the government allowed the operation of a private television namely *Rajawali Citra Television Indonesia* (RCTI). This television relied all funding on advertisement. RCTI broadcasted many entertainment programs, and soon became popular. Besides RCTI, other private televisions were established in the following years: *SCTV* (1990), *TPI* (1991) that later became *MNCTV* (2010), *Indosiar* (1995), *ANTV* (1993), *MetroTV* (2000), *TransTV* (2001), *TV 7* (2001) that later became *Trans 7* (2006), *GTV* (2002) and *Lativi* (2002) that later became *TVOne* (2008), *SUNTV* (2007) that later became *iNews* (2015), *Q Channel* (1998) that changed into *Berita Satu* (2011), *Spacetoon* (2005) that became *NET* (2013), *B-Channel* (1999) that changed into *RTV* (2014) and *Kompas TV* (2011).

Such private televisions are all based in Jakarta and broadcast nationally to all regions of Indonesia through transmitter stations. Common criticisms regards the prominence given to Javanese culture and events happening in Jakarta, whereas, Indonesia has hundreds of local cultures and languages. In 2002, a Broadcasting Law was issued and implemented through the Regulation of the Ministry of Communication and Information Number 43 of 2009. Through the regulation, televisions that broadcast throughout the country must hold a cooperation with the local televisions. For example, a television from Jakarta that intends to be watched by audiences in Ambon, must hold a cooperation with the local television in Ambon. According to the data from Ministry of Communication and Information, till 2012, the number of local televisions that obtained a permit reached 335. The large number of local televisions may be supported by an expectation of investment prospect provided that the networking broadcasting has been fully implemented. The local televisions can expect cooperation and advertisement shares from the televisions in Jakarta.

The networking system should have allowed more diversity of contents and a shared access to advertising revenues. Yet the clash of interests among operators makes the rules hard to implement and result in a sharp divide between national and local broadcasts. Importantly, the terms national and local television are not mentioned in the Broadcasting Law, which only refers to "private television."

A measurement on television audience routinely held by Nielsen Media Research revealed that in 2012, the range of audience segment (share) of local television was only 3 percent. The majority of television audience in Indonesia (97 percent) watched national channels. Besides the audience segment, the advertisement segment of local television was also limited. Local televisions only gained 2.4 percent of the total television expenditure. The remaining 97.6 percent of advertisement expenditure was controlled by national televisions. The data on the audience and advertising segments revealed that although the number of local televisions is very large, they only grabbed a very small audience and limited advertising. National televisions are still the main player.

Of the 15 national televisions, 5 compete for the largest audience: *RCTI*, *SCTV*, *Indosiar*, *ANTV*, and *Trans TV*. The television arena shows the same concentration of media ownership of other media industries in Indonesia. Currently, the occurrence of a merger between televisions makes television directed toward a concentration of ownership. Recently, there are 4 TV groups: Media Nusantara Citra Group (*RCTI*, *MNC TV*, *Global TV*); Trans Corp/PARA Group (*Trans TV*, *Trans 7*); Visi Media Asia/Bakrie Group (*ANTV*, *TV One*) and Emtek (*SCTV*, *Indosiar*).

Subscribed television, either via wire, satellite or Internet protocol is growing. In various communities in urban areas, the service of subscribed television is preferred because besides obtaining complete information and entertainment channels, it has a clear signal. The competition among the subscribed television providers makes the cost of subscription relatively affordable.

Digital Media

Published in 1998, Detik.com is the first online outlet in Indonesia and offers short, concise, and to-the-point news, free of charge. The success of *Detik.com* then brought dozens of similar online media in the late 1990s, such as *Astaga.com*, *Satunet.com*, *Lippostar.com*, *Kopitime.com* and *Berpolitik.com*. Only, these new online media couldn't follow the success of *Detik.com*. There are two reasons why online media did not develop in the early 2000s. First, Internet access in Indonesia at that time was still low, plus the cost of Internet is also relatively expensive. If calculated, it is cheaper to buy newspapers than reading news in online media. Second, the devices to access online media were still mainly PCs, while access from mobile devices was still limited.

Changes occurred after the 2010s, triggered by the rise of cheap smartphone devices with Internet access. At the same time, the cost of Internet access kept on getting cheaper. Today consumers generally access the Internet via mobile devices, more than through personal computers. Currently, almost all cell phones circulating in Indonesia can be used to access the Internet. In 2017 there were 371.4 million cell phone users, 142 percent of the total population (262 million people). In average, there are 1.4 cell phone numbers per person because some people tend to have up to 3 cell phone cards.

These changes made online media grow again. The growth was marked by a rise in online media readers, and followed by a decrease in print media readership. The enormous amount of online media is due to the ease of setting up an online outlet, which can be operated with limited budget and human resources. There is no exact data on the number of online media. The Press Council estimated that till 2017, the number of online media was 43,300, of which only 234 (5 percent) could be verified by the council. As much as 95 percent of online media could not be verified due to having no editorial address, no legal entity, and no standard in writing.

There are three categories of online media. First, online media as a replacement of printed media that moved into publishing online versions only. Examples are: *Horison-online.com* (previously known as *Horison Magazine*), *Bola.com* (previously known as *Bola Daily*), *Cewekbanget.id* (previously known as *Kawanku Magazine*), *Nova.grid.id* (previously known as *Nova Tabloid*), *Hai.grid.id* (previously known as *Hai Magazine*), etc. Second, online media which are part of printed media that keep both versions. The examples are: *Liputan6.com*, *Kompas.com*, *Merdeka.com*, *Tribunnews.com*, *Republika.co.id*, *Bisnis.com*, *Jawapos.com*. And third are those online media that were born digital without ever having a printed version, such as *Okezone.com*, *Viva.co.id*, *Detik.com*, *Kapanlagi.com*, *Kumparan.com* etc.

Till 2017, the online media with the largest number of readers, according to the data from Alexa.com, are: *Detik.com*, *Tribunnews.com*, *Liputan6.com*, *Kompas.com*, *Merdeka.com*, *Viva.co.id*, for news; *Kapanlagi.com* and *Bintang.com* for entertainment; *Bola.com*, and *Bola.net* for sport.

Social Networks

Indonesia has the biggest growth of Internet users in the world. According to a study conducted by *Asosiasi Penyedia Jasa Internet Indonesia* (Indonesian Internet Service Provider Association - APJII), in 2017, the Internet users reached 142 million people with a penetration of 54.69 percent of the total of population. This number is large, considering that in 1998 the number of Internet users was only 500,000 people. Other data from Wearesocial.org (January 2018) revealed that Internet users reached 132.7 million with a penetration of around 51 percent of the population. The large number of Internet access influences the way people consume news. According to the survey of APJII, news access is one of the most popular activities for Internet users in Indonesia besides using social media.

Indonesia is also one of the countries with the largest number of social media users in the world. According to data from

Wearesocial.org (January 2018), the total number of social media users amounts to 130 million, with a penetration of half the population. When comparing the number of Internet users with social media users, it is evident that about 97.9 percent of Internet users use social networks and as many as 120 million users access social media via mobile devices. The average length of time spent on social media from various devices reaches 3 hours and 23 minutes per person per day.

The data from Wearesocial.org also shows that YouTube occupies the first position as the most accessed social media. As many as 43 percent of Internet users access Youtube. Following are Facebook (41 percent), WhatsApp (40 percent), Instagram (38 percent) and Line (33 percent).

Opinion Makers

Besides online media, recently, citizen journalism is also growing. Such medium gives opportunity to the readers to do coverage or to produce a writing. In the beginning, this citizen journalism was created by the online media, for examples: *Kompasiana* (created by *Kompas.com*), *Indonesiana* (created by *Tempo.co*), *Pasang Mata* (created by *Detik.com*) and *Ruang Publik* (created by *Okezone.com*). There are also examples of citizen journalism not coming from online media, such as: *Geotimes*, *Plimbi*, *Qureta*, and many more. Through citizen journalism, audiences can voice their own opinions through Internet.

The Internet presence also creates new opinion makers. Politicians and public officials, generally have social media accounts. Through social media they comment on public issues and their posts often generate public discussions. Politicians with the largest number of followers are @jokowi (10.2 million followers), @SBYudhoyoo (9.93 million followers) and @prabowo (3.16 million followers).

Interestingly, in addition to official accounts made by politicians, public officials or community leaders, many social media accounts are of anonymous nature and yet become public opinion trend setters. For issues related to artists or the celebrity world, two popular Instagram accounts are @lambe_turah (more than 5 million followers) and @lambenyinyir (1 million followers). For information on the political world, two popular Facebook accounts are @Katakita (878,000 followers) and @Maklambeturah (753,000 followers). Twitter accounts mostly active on political issues are @kurawa (313,000 followers) and @partisocmed (137,000 followers). Posts from these social media accounts are often discussed not only by Internet users but also by media and public officials.

Sources

Newspapers

- [Bali Post](#)
- [Banjarasin Post](#)
- [Fajar](#)
- [Harian Analisa](#)
- [Jawa Pos](#)
- [Kedaulatan Rakyat](#)
- [Kompas](#)
- [Koran Tempo](#)
- [Media Indonesia](#)
- [Pikiran Rakyat](#)
- [Pos Kota](#)

- [Rakyat Merdeka](#)
- [Republika](#)
- [Riau Pos](#)
- [Suara Merdeka](#)

Radio

- [Radio Ardan](#)
- [Radio Elshinta](#)
- [Radio Gadjah Mada](#)
- [Radio GEN](#)
- [Radio Geronimo](#)
- [Radio Istara](#)
- [Radio Prambors](#)
- [Radio Sonora](#)
- [Radio Suara Surabaya](#)
- [RRI](#)

TV

- [ANTV](#)
- [Berita Satu](#)
- [Indosiar](#)
- [iNews](#)
- [Kompas TV](#)
- [MetroTV](#)
- [MNCTV](#)
- [NET](#)
- [RCTI](#)
- [RTV](#)
- [SCTV](#)
- [Trans 7](#)
- [TransTV](#)
- [TVOne](#)
- [TVRI](#)

Online media

- [Bintang.com](#)
- [Bola.com](#)
- [Bola.net](#)
- [Detik.com](#)
- [Idntimes.com](#)
- [Kapanlagi.com](#)
- [Kompas.com](#)
- [Liputan6.com](#)

- Merdeka.com
- Okezone.com
- Sindonews.com
- Tempo.co
- Tribunnews.com
- Viva.co.id

Citizens journalism

- Geotimes
- Indonesiana
- Kompasiana
- Pasang Mata
- Plimbi
- Qureta
- Ruang publik

Organisations

Trade Unions

Trade unions are absent from almost all media companies in Indonesia. This condition results in the low bargaining position of journalists when there are employment/personnel issues starting from salary problems to the termination of employment. The scarce awareness to join a union was considered as the dominant factor of the low number of trade unions. The majority of trade unions is still centralised in Jakarta, the Capital City of Indonesia.

Data collected in 2014 by *Federasi Serikat Pekerja Media* (Federation of Media Workers Unions - FSPM) showed that only 24 out of 2,338 media companies (1 percent) had links with a trade union. Meanwhile, according to a 2015 report by *Aliansi Jurnalis Independen* (Alliance of Independent Journalists), there were only 17 active press trade unions out of the total of 24 registered press trade unions.

Journalist Associations

The three largest journalist organisations in Indonesia are *Persatuan Wartawan Indonesia* (Indonesian Journalists Association - PWI), Alliance of Independent Journalists (AJI) and *Ikatan Jurnalis Televisi Indonesia* (Indonesian Television Journalists Association - IJTI). The total number of journalists who are members of either of the three associations is about 20,000 people. The largest organisation is PWI, with around 15,852 members, followed by IJTI with around 2,500 members. However, more journalists are not members of journalist organisations. If referring to data from *Dewan Pers* (2017) while there are around 100,000 journalists in Indonesia, only 20 percent of them are incorporated in journalist organisations.

The oldest journalist organisation is the PWI, founded in 1946. In the era of President Soeharto (1966-1998), PWI was the sole journalist organisation. Anyone aspiring to become a journalist had to be a member of PWI. This organisation in the Soeharto period was often used as a tool to suppress and control journalists, in order not to criticize the government. Journalists dissatisfied with PWI, then established AJI in 1994. AJI has campaigned for wage-worthy standards for journalists and is currently involved in monitoring of incidents and lobbying for the safety of journalists. After the Soeharto era, there was no necessity for journalists to become members of an association. Many journalists, especially outside Jakarta, are not members of any journalist organisations.

News Agencies

The main news agency in Indonesia is Antara, which is owned by the government. This news agency was founded by young patriots and its birth was inseparable from the spirit to gain freedom for Indonesia. Antara was officially changed in 1962 into *Lembaga Kantor Berita Nasional* (National News Agency Institute), directly under the control of the President of the Republic of Indonesia. In 2007, it further changed into *Perusahaan Umum Lembaga Kantor Berita Nasional Antara* (General Company of National News Agency Institute - Perum LKBN Antara), which was under the Ministry of State-Owned Enterprises. This news agency has a communication network that covers many remote areas in Indonesia and in the world. There are correspondents in every province and representatives in several municipalities/regencies. In order to be able to provide foreign news with a national perception, the agency has agents/representatives in Kuala Lumpur (Malaysia), Beijing (China) and London (England). The former Antara also builds cooperation, either commercial or non-commercial, with the news agencies all over the world. Hundreds of foreign news pieces originated from these work partnerships and in average, 750 news resulted from the coverage of former Antara journalists are broadcasted every day through the latest communication technologies such as VSAT and DVB, and also many kinds of Internet-based technologies such as websites, email and ftp (file transfer protocol). In addition to serve news and pictures, the agency also offers services of data and information on money market and shares, dissemination of press releases (PRWire) and journalism education.

Audience measurement organisations

Data concerning media in Indonesia are provided by many institutions. Printed media data are provided by the Press Council, the *Serikat Penerbit Surat kabar* (Newspaper Publishers Union - SPS), and the *Asosiasi Penerbit Surat kabar* (Association of Newspaper Publishers). Every year, the Press Council publishes a book entitled "Data Pers Nasional". Meanwhile, every year, SPS publishes a book entitled "*Media Directory*". Both of the books only display the list of names and media profiles (such as address, editorial organisation, etc). Unfortunately, data concerning the number of circulation or the number of readers of the printed media are not available on the books. Data concerning radio were provided by *Persatuan Radio Siaran Swasta Nasional Indonesia* (Association of National Private Radio Broadcasting Indonesia - PRSSNI). Similarly to the data about media, PRSSNI data concerning radios only contain the list of names and profiles of radios. No data concerning the number of radio listeners.

The most complete data concerning media are provided by Nielsen Media Research (NMR), which began their research activities in Indonesia in 1991. The main product of NMR is *Panel Survei Kepemirsaaan Television* (Television Audience Measurement - TAM) which provides data on the daily ratings of television programmes. Data about ratings by NMR are used as the base for determining which program is preferred by the public by advertising agencies and television stations. In 2016, the rating of television by NMR was conducted on 2,273 households that own a TV set or 8,736 individuals part of the television audience in 11 big cities in Indonesia (Hendriyani & Eriyanto, 2016). Besides data on television rating displayed daily, NMR annually conducts a survey concerning the newspaper readers and radio listeners. Data of television audience

(rating), radio listeners and newspaper readers from NMR can be accessed paying a fee. Data concerning the film industry are provided by Konfiden, an institution providing data on all movies, reviews and audience. Data on the audience numbers was obtained by collecting data on the attendance from cinema networks.

Sources

News agencies

- [Antara](#)

Trade unions

- [Alliance of Independent Journalists](#) (AJI)
- [Federation of Media Workers Unions](#) (FSPM)

Journalist Associations

- [Indonesian Journalists Association](#) (PWI)
- [Indonesian Television Journalists Association](#) (IJTI)

Audience measurement organisations

- [Association of National Private Radio Broadcasting Indonesia](#) (PRSSNI)
- [Association of Newspaper Publishers](#) (SPS)
- [Konfiden](#)
- [Press Council](#)

Policies

Media legislation

Indonesia underwent a very important process of mass media democratisation since the end of New Order era. A series of laws have been introduced to reveal the strengthening of civil society and people's right on information such as Law Number 39 of 1999 concerning Human Rights, Law Number 40 of 1999 concerning the Press, Law Number 32 of 2002 concerning Broadcasting and Law Number 14 of 2008 concerning Public Information Transparency. In addition, there were also Law Number 44 of 2008 concerning Pornography (that although it limits the dissemination of pornography, it still gives the opportunity for people to consume certain kinds of pornography) and Law Number 33 of 2009 concerning the film industry (which sets the rules for the government's intervention in limiting the public rights).

The Law on Human Rights also states the right to information. The law, among other principles, states that "everyone has a right to search, obtain, own, retain, process, and convey information by using all kinds of available media" (Article 14 Clause 2); and also that "everyone is free to have, to convey, and to share opinion according to their consciences, either orally or written, either through the printed media or electronic media by considering the religious values, moral values, harmony, public interest, and national integrity" (Article 23 Clause 2).

In terms of press freedom, Indonesia has a democratic Press Law, passed in 1982 and amended in 1999. It abolishes the provisions that blocked press freedom and firmly conveys that “the press independence is guaranteed as the citizen right.”; With the 1999 amendment it also abolished the government’s role in ruling the press arena, the provision of each press institution to own Press Publication Business Licenses, and the articles that facilitate censorship, banning or broadcasting ban against the national press. The law also establishes that journalists must follow the Journalism Code of Ethic.

The Press Law also contained a provision concerning the existence of the Press Council, an independent institution to develop press independence and to improve the life of the national press. The Press Council implements the functions of: (a) conducting a study for the improvement of press life; (b) determining and supervising the implementation of the Journalism Code of Ethic; (c) providing consideration and making an effort of settlement on complaints on cases relating to press reporting; (d) developing the communication among the press, society, and government; (e) facilitating the press organisations in drafting the regulations concerning the press and improving the quality of journalism profession, and (f) collecting data on press companies.

The Broadcasting Law of 2002 was instead the result of civil society’s struggle in building a democratic system of broadcasting, an embodiment of the transitional effort from a governmental power toward a public power. Nevertheless, unlike the Press Law that entirely abolished the government’s authority, in the Broadcasting Law, the government’s role is still recognised as partner of new regulator institution formed by the House of Representatives (DPR), namely *Komisi Penyiaran Indonesia* (Indonesian Broadcasting Commission - KPI). Similarly, there also many provisions in the Broadcasting Law that are still general and need more operational implementing regulations. During the course of 15 years (2002–2017), various of the law’s provisions that placed the management of frequencies under public sovereignty failed to deliver. The government still holds control over the broadcasting domain, and the role of KPI as an independent regulator weakened. Many problems showed a dark scenario in the broadcasting field, such as the failure to implement the System of Networking Stations, the concentration of ownership in the hands of a small number of large media business owners, the contents of TV broadcasting that violate the rules of broadcasting. Within these many problems, the role of the media industry is getting strong, meanwhile, the public’s role (civil society’ role) is being ignored. The law is under amendment since 2011, but the revision process is not complete yet. Debate arose during the process, especially concerning the digitalisation and cigarette advertisement.

To regulate the information technology media, the Law of Electronic Information and Transaction (known as UU ITE) was introduced in 2008, namely Law Number 11 of 2008 which was amended into Law Number [19 of 2016](#). UU ITE and then the Amendment of UU ITE generated sharp criticism from civil activists and pro-democratisation groups. UU ITE had played victims of hundreds of people who were reported due to their activities conducted in the Internet world. Criminalisation against the Internet users was especially due to the provision of Article 27 clause 3 on UU ITE which was not amended on the Revision of UU ITE. The Amendment of UU ITE also poses a threat to the democratisation process because of the addition of an article concerning the right to be forgotten and the government’s authority to take down any electronic content if it is considered as disseminating information that breaches the Law.

In Indonesia, there is also self-regulation in the advertisement domain, through the Indonesia Advertising Code of Ethics. The code was arranged by *Dewan Periklanan Indonesia* (Indonesian Advertising Council) and supported by tens of advertising and broadcasting associations. Advertising players agreed to make it the guide to behave internally and behave in the profession and business according to common values. The code was arranged in two main sections, namely the Code of Conducts or Code of Professional Ethics and the Code of Practices.

Accountability systems

Media accountability in Indonesia is run both internally and externally. Internal accountability is theoretically done by the media by establishing an ombudsman institution, which serves as a link between the audience and the media. Audiences who are dissatisfied with the media, may report media intent to the ombudsman, and the ombudsman will examine alleged ethical violations including a punishment recommendation to journalists. From the side of internal accountability, only *Kompas* newspaper implemented ombudsman institutions. There has been no awareness among other media to do so.

The preferred media accountability system that is widely selected by the media is an external one provided by the Press Council. According to the Press Law (UU 40/1999) disputes between audiences and media are mediated by the Press Council. Audiences who feel disadvantaged by media coverage, do not report the case to the police but report to the Press Council, which will examine the case. The Press Council will then recommend the settlement of the case, for example by granting the right of reply, re-announcement, and so on.

In the period 2010-2015, the total number of complaints to the Press Council amounted to 2,888 cases. This means in an average year there are 300-400 complaints (Amri & Manan, 2017). The settlement of cases through the Press Council avoids the occurrence of media criminalisation, in which media or journalists are incarcerated for writing. Generally cases of public and media disputes can be resolved well by the Press Council.

Regulatory authorities

The regulator of broadcasting media is the *Komisi Penyiaran Indonesia* (Indonesian Broadcasting Commission - KPI). According to the Broadcasting Law, KPI is proclaimed as an independent state institution which regulates anything related to broadcasting. The existence of KPI shows the public sovereignty on frequencies, because KPI is an embodiment of the people's participation and it functions as the representative of the people's interest in broadcasting. Nevertheless, practically, the provisions firmly proclaimed in the Broadcasting Law were not properly implemented. Soon after the Law of Broadcasting of 2002 was passed, the broadcasting industry arena proposed a judicial review against this Law, that resulted in a reduction of KPI's authority. With a limited authority, KPI focuses more on managing the supervision on the content of broadcasting. KPI drafted the rules of the broadcasting code of conduct and broadcasting standards.

Other broadcasting matters are handled by the government (Ministry of Communication and Information).

Sources

Laws, Regulations and Institutions

- [Central Information Commission](#)
- [Indonesian Broadcasting Commission](#)
- [Ministry of Communication and Information](#)
- [Press Council](#)

Education

Universities and schools

Journalism education is taught in universities through the study program of Communication Science. In 2017, there were 421 study programs of communication for undergraduate level, 42 for master degree and 5 for doctorate program. Not all the study programs offer the same quality, which is established by the National Accreditation Board for Higher Education (or BAN-PT). In 2017, from a total of 421 study programs of communication at undergraduate level, only 30 (7.1 percent) have obtained the highest quality grade (accreditation A).

The degree of competition to enroll in the communication study programs of state universities shows how much students appreciate this field. In 2016, the number of students accepted in the state universities especially to study communication was only 3 percent of the total of the applicants. The competition grades (the number of available chairs compared to the number of applicants) of the communication program in several universities are as follows: University of Indonesia (2.23 percent), Gajah Mada University (1.43 percent), University of Padjajaran (1.61 percent), University of Airlangga (2.91 percent), University of Hasanuddin (1.69 percent), University of North Sumatera (2.76 percent), and Bogor Institute of Agriculture (3.32 percent).

The total number of students of communication science is between 15,000 and 20,000 people every year. It is important to notice that this number includes all fields. In Indonesia, higher education in communication generally is divided in 5 fields: journalism, broadcasting, advertising, public relations and marketing. Interestingly, not all graduates of journalism and broadcasting work within the media. Many graduates in journalism work at banks or other industrial sectors. On the other hand, media also tend to recruit journalist from other disciplinary fields. These candidates are then provided specific training.

Professional development

In Indonesia, journalism is seen as a prestigious profession because it allows to be close to government officials. On the other hand, the profession does not guarantee a decent salary, as shown by a survey conducted by the Alliance of Independent Journalists in 2012. The average standard of journalists' salaries is only slightly above the minimum wage and this has led to the practice of "envelope journalism" in Indonesia, where journalists rely on money from resourceful persons.

The professionalism in the standards of journalists also affects media professionalism. Professional media generally recruit aspiring journalists with minimum undergraduate education. The candidates to become journalists are given good training either by the media or outside the media. On the other hand unprofessional media generally do not have a standard in recruiting journalists. Journalists are not given adequate education and training on ethics. To filter professional and unprofessional journalists, the Press Council has certified some journalists. Those who have passed the exam and are declared as competent, are expected to maintain a standard in ethics, knowledge and journalistic skills. As of 2017, as many as 10,852 journalists have passed the competence test.

Sources

Media and Journalism studies

- [Department of Communication Science](#), Gadjah Mada University
- [Department of Communication Science](#), University of Indonesia
- [Dr. Soetomo Press Council](#)
- [Faculty of Communication Science](#), University of Padjajaran

Conclusions

Conclusion

There are three important phenomena in the development of the media landscape in Indonesia. First, the media professionalism. After 1998, the number of active media reached 45,000 thanks to the ease of setting up an outlet. Although there are many media, those who maintain professional business standards (published regularly and earning income through advertising), are only about 1,000 to 2,000 media. Second, the emergence of media conglomerates. In the past 15 years, there has been an integration and splitting of media into publishing groups. The 12 largest groups control a share of over 50 percent of the media. Third, the development of the Internet. The increasing number of Internet access, thanks to the cheaper costs for both subscription and technology devices (especially cell phones), have changed the way Indonesian public consume media. At the time of writing this report, online media has not yet succeeded in shifting traditional media (television, radio and print press) because of the persisting difficulty in attracting advertising. But in the future, the Internet will surely have a profound effect on the development of the media industry.

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