Media In the Archipelago: Navigating the Labyrinth of Ownership, Diversity, and Politics in Indonesia's Information Landscape

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Abstract

Indonesia's media landscape, characterised by a diverse yet oligopolistic structure, is scrutinised through thematic analysis and desk research. The study reveals that media ownership is predominantly concentrated in the hands of powerful conglomerates with significant political ties, raising concerns about the impartiality and representation of various political perspectives. Central to this landscape is the influence of digital platforms on shaping public opinion and distributing news. The study also observes a Jakarta-centric bias, where the media of the capital dominates, often sidelining regional voices. Emphasizing the necessity of vigilant oversight, the study advocates for regulatory measures to safeguard media diversity and transparency in ownership. Additionally, it underscores the importance of strengthening regional media to better reflect the diverse voices. This comprehensive analysis offers insights into the intricate dynamics governing Indonesia's media sector, highlighting its pivotal role in the nation's democratic dialogue and overall development.

Keywords: *Media Ownership, Media Diversity, Media Politics, Digital Media, Media Oligopoly, Indonesian Media.*

Introduction

In the post-New Order era of Indonesia, the nation's media landscape has undergone a profound transformation, particularly within the domain of private television media. The legacy of the New Order regime, marked by the authoritarian rule of President Suharto, left an indelible mark on the media, and our research aims to unravel the intricate interplay between political and economic dynamics that have significantly reshaped this landscape (Steele, 2019).

This comprehensive study examines the evolving dynamics of Indonesia's private TV media, specifically focusing on the post-New Order era (Tyson & Purnomo, 2017). It delves into the political transition that ushered in a dynamic political landscape, where politicians and influential capitalists began asserting their influence within the media sector. This shift in media ownership dynamics has redefined power structures within the media landscape and its role in shaping public discourse (Masduki, 2021).

Simultaneously, there have been noteworthy shifts in economic forces, encompassing variations in advertising revenues and market forces within the private TV media sector (Sen, 2003). These economic factors are intrinsically related to content production, where private interests play a crucial role in

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determining the topics and narratives that receive prominence within media content (Munzir et al., 2019).

Furthermore, these evolving dynamics extend beyond the media sector. They significantly impact democratic values within Indonesia, including issues related to freedom of expression, accountability, and the overall health of democracy (M. Syam et al., 2020). The media, increasingly entwined with political and economic interests, wields the power to shape political discourse and influence public opinion.

In this context, our research seeks to provide a comprehensive understanding of the intricate political economy of private TV media in Indonesia and its implications for democratic values. By shedding light on these complex dynamics, this study offers insights that may inform policy decisions and strategies aimed at enhancing media diversity, upholding democratic principles, and contributing to the broader political and economic landscape in the post-New Order era.

The structure of the paper is meticulously organized to facilitate a comprehensive understanding of Indonesia's media landscape. Following the introduction, the paper unfolds with an extensive review of the literature that lays the groundwork for the study. This is succeeded by a detailed methodology section, outlining the research approach and data collection techniques. The results are then presented, synthesizing findings from desk research and interviews. A thoughtful discussion section integrates these findings, offering deeper insights. The article concludes with a summary of key discoveries, implications for the future, and suggestions for future research. This structured approach ensures a logical flow and clear presentation of the study's findings.

Literature Review

Media Dynamics in Post-Autocratic Indonesia

The examination of the media environment in Indonesia following the autocratic regime has garnered significant scholarly interest as media experts endeavour to comprehend its complex dynamics (Lim, 2017). Historical, political, and economic factors influence the dynamics under consideration, which have changed at several stages of the post-autocratic period.

The initial phase, marked by the tenures of Sukarno and Suharto (1955-1998), is frequently referred to as the authoritarian era, during which governmental action and state oversight significantly influenced the media landscape of Indonesia (Anom et al., 2021; Deha, 2021). During this particular era, the media was effectively used as a means of political propaganda and censorship, as evidenced by the prominent role played by the Ministry of Information (Departemen Penerangan) in regulating and controlling media content under the authoritarian system (Sujoko, 2019). This period was characterised by a high degree of governmental regulation in disseminating information and narratives to the general public.

The second phase is characterised by Indonesia's transition from autocracy to democracy from 1998 to 2020. This period exhibits the characteristics of a transitional phase, distinguished by a decline in democratic practices, as noted by Aryani et al. (2023). During this particular period, Indonesia had the challenge of reconciling democratic and authoritarian components within its political framework, resulting in a hybrid system. President Habibie spearheaded a series of legislative reforms to liberalise the nation's media landscape. According to Barokah et al.(2022), the enactment of Press Law No. 40 of 1999 and the subsequent establishment of a press council played a crucial role in facilitating the media's shift towards self-regulation and a greater emphasis on democratic principles. The collapse of the Ministry of Information represented a notable shift away from the autocratic government's authority in regulating media content (Chairunisa & Firman Ashaf, 2022).

The media landscape in Indonesia over the period from 2002 to 2019 exhibited a paradoxical depiction. One perspective is that it adopted a pluralistic media policy to promote a wider range of media ownership

and content creation. The introduction of public and community media models, along with commercial outlets, was a significant development brought about by implementing Broadcast Law No. 32 of 2002. Furthermore, legislation was created to promote freedom of online communication and ensure access to public information (Intyaswati et al., 2023). Nevertheless, implementing these progressive rules faced resistance from prominent commercial media organisations and coalitions comprising media oligarchs and political personalities (Rochyadi-Reetz & Wolling, 2022).

The convergence of economic factors and the media environment is a prominent characteristic of the post-autocratic period. Masdar (2022) has emphasized the Suharto regime's and successive governments' role in promoting liberalization, which increased global media ownership in the Indonesian television industry. Global advertising has played an important role in advancing marketization, leading to the marginalisation of broadcasters with a public-orientated focus. In the mid-20s, Indonesia's media policies deviated from the principles of complete liberalisation. This was evident when the government introduced a new broadcast law, which indicated a willingness to intervene in media affairs for political purposes (Rochyadi-Reetz & Wolling, 2022; Wende, 2022). This move had a similarity to autocratic policies.

The issue of media plurality in Indonesia continues to be a matter of significant concern, particularly when considering the discrepancies that exist at the regional level. Raimond and Ruliana (2022) have seen significant disparities in media ownership and infrastructure development between provinces with varying levels of development. The differences above have significant repercussions that extend to other aspects, including the accessibility of the Internet, the development of digital media platforms, and the availability of conventional media in geographically isolated rural regions. The expansion of rural and community-based media platforms has experienced a substantial increase; however, they encounter notable obstacles originating from intricate regulatory frameworks and constrained financial backing, particularly in upholding standards of journalistic excellence (Arsyi, 2022; Kazakov, 2022; Irawan, 2018).

The media landscape in Indonesia has seen significant changes, yet the issue of media freedom continues to be a subject of debate and disagreement. According to the 2020 evaluation conducted by Freedom House, Indonesia's media is still categorised as "partly free," which suggests that there are still obstacles to establishing a fully democratic public sphere. According to the 2020 report conducted by Reporters Without Borders, Indonesia's ranking among 179 nations was 119th, which is a substantial decline from its position of 57th in 2002 (Arsyi, 2022).

According to Aryanti (2022), the media regulations implemented after the Suharto era have significantly facilitated the expansion of private television networks. These policies have been pushed mainly by nonmedia capitalists prioritising profit maximisation rather than disseminating diverse news and information. The expansion driven by market forces has resulted in a concentration of ownership among persons with strong political connections, thereby impeding the implementation of regulations to promote media diversity and perpetuate the dominance of political media owners.

Media Ownership and Diversity of Viewpoints

In recent years, there has been a significant focus on the concept of "media diversity" within academic discussions, serving as a foundational premise in the process of media democratisation in both developed and developing democratic societies (Akbar et al., 2022; Mashuri et al., 2022; Wahyuni et al., 2023; Putra et al., 2023). It is crucial to acknowledge that in academic discourse, the terms "media diversity" and "media pluralism" are sometimes employed interchangeably, as they contain internal and external aspects. The former includes many media formats, programme genres, and the portrayal of various political and cultural viewpoints (Tutak & Brodny, 2023). The term "latter" refers to the concept of pluralism in media outlets and ownership, which aims to foster a diverse array of voices and opinions within the media (Intyaswati et al., 2022; Safrizal Rambe & Zulkarnain, 2022).

Within the Western setting, policymakers and researchers have consistently acknowledged the importance of advocating for "media diversity" or "media pluralism" as a fundamental policy objective (Wielicka-Gańczarczyk & Jonek-Kowalska, 2023). As an illustration, during the 1980s, the United States Federal Communications Commission (FCC) formulated a media diversity index to address fears over the consolidation of media ownership (Karimullah et al., 2022). The index considered a variety of factors that included perspective diversity, outlet variety, ownership diversity, programme diversity, and source diversity. Similarly, the European Commission initiated a research in 2009 to create a monitoring instrument to assess media plurality across its member states. This endeavour led to the development of the Media Plurality Monitor (MPM). The Media Diversity Monitor (MPM) encompasses various essential indicators, including fundamental domain, cultural diversity, geographical pluralism, media ownership and control pluralism, political pluralism, and pluralism of media forms and genres (Mazahir et al., 2023; Siregar et al., 2022; Tomsa & Bax, 2023).

Although adopting and adapting these notions have predominantly occurred in Western democracies (Kuzior et al., 2023), they have also demonstrated importance in transitional democracies such as Indonesia. The Media for Democracy Monitor (MDM) is a comprehensive assessment tool initially established in Europe and has since been adopted by multiple countries. It employs a set of indicators that are firmly rooted in normative media and journalism theories. These indicators specifically examine the roles and functions of news media concerning concepts such as freedom, information dissemination, control, watchdog responsibilities, and equality (Murti et al., 2023).

This study aims to critically examine the academic methodologies employed in the specific setting of non-Western, post-authoritarian Indonesia. The focal point of this study lies in the concentration of media ownership and its correlation with political politics in Indonesia (Mustika, 2022; Samy, 2023). The present study examines explicitly the Media Diversity Monitoring Framework (MDMF) implemented by UNESCO Jakarta, emphasising two key indicators: ownership diversity and opinion diversity.

The MDMF, implemented by the Jakarta office of UNESCO in 2020, draws inspiration from Western democratic models and is structured based on political, economic, and sociocultural variables. Examining political-economic indicators involves analysing the legislative framework influencing media diversity and assessing policies that facilitate its advancement (Evanalia, 2022; Kartasasmita et al., 2023). These indications go beyond ownership and encompass media regulators, ethical rules, and organisational charters. Sociocultural indicators pertain to the media accessible to the inhabitants of Indonesia, as well as the various elements that influence this accessibility, such as the availability of funding and the state of broadband internet infrastructure (Kyrchanoff, 2022).

Ownership diversity in media outlets encompasses a range of actors, including state and corporate corporations, as well as independent and autonomous organisations. The spatial perspective significantly influences the examination of ownership proportions at both the national and provincial levels. The promotion of media diversity is underscored by including a wide range of stakeholders throughout various stages of production, supply, and distribution (Budiasa, 2022; Purnama, 2022).

This study also reexamines the macro conceptual frameworks proposed by authors such as Gallegoos et al. (1998), who investigate the correlation between media diversity and democratic media theory. Napoli delineates diversity into three distinct components, namely source diversity, content diversity, and exposure diversity. These components emphasise ownership and perspective diversity(George & Venkiteswaran, 2019; Mackie et al., 1973). The research establishes a correlation between the diversity of sources and the diversity of ownership, the diversity of content and viewpoints, the diversity of exposure, and the availability of a wide range of ideas. This perspective posits a direct association between these factors, highlighting the importance of varied ownership in fostering various perspectives.

Susilo (2017) explore the theoretical foundations of media diversity within the framework of liberal, deliberative, and agonistic conceptions of democracy. The authors present a framework consisting of two perspectives through which media diversity may be assessed: positive and critical diversity. Affirmative diversity refers to the media's function of reflecting societal norms, facilitating a platform for public discourse, and cultivating an environment conducive to exchanging ideas. In contrast, critical diversity emphasises the presence of structural disparities, frequently influenced by economic interests, and advocates for limitations on commercial media activities to guarantee a comprehensive representation of perspectives.

This research examines the importance of a varied media ownership landscape and diverse opinions in political politics. The study differentiates between the liberal representative approach and the liberal participatory method. The former places significant importance on including valid perspectives in journalistic content, frequently mirroring the stances of political entities. The latter highlights the significance of perspectives from non-elite individuals in shaping media content. The influence of commercial media on media diversity and representation is contingent upon the intricacies of the political system, which encompasses the polarization of binary politics evident in diverse election systems (Rahayu, 2023).

Based on the basis mentioned earlier, this research investigates the range of media ownership in Indonesia and its impact on the portrayal of various perspectives within the nation's media landscape, which has undergone liberalization and digitalization. Doing so provides a complete evaluation of media ownership and the presence of many viewpoints within Indonesia's media system. The primary objective of this study is to investigate the extent to which the existing media ownership structure in Indonesia influences the presence of diverse perspectives within the country's liberal press system.

Methods

This section outlines the comprehensive methodology employed to investigate media diversity within the Indonesian context. It underscores the utilisation of qualitative and quantitative techniques, guaranteeing a robust exploration of media ownership and viewpoint diversity. This research adheres to established academic principles and practices to ensure methodological rigour.

Sampling and Respondents

Sample: The research adopts a purposive sampling approach, meticulously selecting participants based on their expertise and direct involvement in media diversity, ownership dynamics, and media regulation within Indonesia. The selection process encompasses a diverse cohort of stakeholders, each poised to offer valuable insights relevant to the study objectives.

Inclusion Criteria: Participants are included in the study based on their demonstrated knowledge and experience in areas pertinent to the research. This includes individuals from academia, media regulatory bodies, media advocacy organisations, and working journalists, all of whom can provide substantive insights into the intricacies of media diversity and ownership in the Indonesian landscape.

Exclusion Criteria: Individuals lacking relevant expertise or experience in the domains above are systematically excluded from the participant pool. This stringent application of exclusion criteria ensures that the research benefits exclusively from the perspectives of individuals intimately acquainted with the subject matter.

Data Collection

The Research Method Combines two Primary Approaches

Desk Research: The study commences with an extensive desk research phase, drawing information from various sources, including official governmental reports, nongovernmental publications, academic

studies, annual reports from media associations, and documentation from media regulatory authorities. This data encompasses intricate details concerning media ownership, regulatory safeguards, and media diversity in Indonesia.

Semi-structured Interviews: A series of meticulously conducted semi-structured interviews constitutes a pivotal component of this research. These interviews are thoughtfully designed to elicit profound insights into a spectrum of aspects of media diversity, including the dynamics of ownership, regulatory safeguards, challenges, and opportunities in the Indonesian context. These interviews are meticulously executed between [start date] and [end date] and are geared toward securing qualitative data of the highest quality to enrich the study.

Semi-structured Interview Questions

- What is your perspective on the current state of media diversity in Indonesia?
- Can you provide insights into the ownership dynamics of media outlets in Indonesia and their impact on media diversity?
- How have regulatory safeguards influenced media ownership and diversity in the country?
- What challenges and opportunities do you see in promoting media diversity in the Indonesian context?
- In your opinion, how does media ownership impact the representation of diverse viewpoints in the media landscape?

Data Analysis

The data analysis process adheres to rigorous academic standards:

Transcription: Data derived from semi-structured interviews are transcribed with unwavering precision to ensure data fidelity and to facilitate subsequent analysis.

Thematic analysis: Thematic analysis is employed as the analytical framework, enabling the identification of recurrent themes, patterns, and profound insights within the qualitative data collected during interviews. This process involves methodical coding and categorising meaningful themes that directly pertain to media diversity and ownership within the Indonesian environment.

Results

Desk Research Findings

Through an extensive examination of the Indonesian media landscape, this analysis uncovers a noteworthy correlation between the concentration of media ownership, the engagement of media owners with political agendas, and the limited diversity of political perspectives propagated within the media. This investigation primarily relies on comprehensive desk research. The study also establishes a causal relationship between the political polarisation observed during Indonesia's 2019 election and the polarization of public opinion, specifically with respect to the two presidential contenders.

Broadcast Law No. 32 of 2002, a principal legislative enactment within the Indonesian media landscape, places significant emphasis on fostering the importance of media diversity. Recognising the significance of public and community broadcasters in conjunction with the prevailing commercial sources within Indonesia's media environment is evident. This regulation highlights the importance of two key elements: a diverse range of owners and the inclusion of diverse materials and perspectives. This study follows the conclusions drawn by several media analysts, such as Gazali (2014), Nugroho et al. (2013), and Tapsell (2017), who have continuously noted that media partisanship and political polarisation pose substantial challenges to these two aspects of diversity.

Upon closer examination of the media environment in Indonesia, it becomes evident that two significant

scenarios emerged after the implementation of Broadcast Law No. 32 in November 2002. To begin with, it is worth noting that there is a significant consolidation of media ownership within media conglomerates, predominantly concentrated in the capital city of Jakarta. Furthermore, these corporations have demonstrated significant engagement in media outlets' editorial and newsroom decision-making processes with evident political aspirations. The research findings suggest a significant focus on Jakarta regarding ownership and content within the media landscape of Indonesia. Most media organisations are centrally located in Jakarta and are under private ownership. In 2020, the Ministry of Communication and Informatics (MCIT, 2020) reported 1,251 television broadcasters in Indonesia, including the public, private, paid and community sectors. However, it should be noted that a significant concentration of these broadcasters was observed near Jakarta.

Based on the existing literature, the evaluation of ownership diversity, as evidenced by the 2017 Key Performance Indicator (KPI) report, the 2020 Ministry of Communications and Information Technology (MCIT) report, and the annual reports of private broadcasting organisations, reveals significant discrepancies in media licencing. In Indonesia, commercial broadcasters represent a substantial portion of the media market, boasting 689 national and regional stations. In contrast, the number of public broadcasters is limited to 130. The availability of community radio and television is constrained, as it is now confined to a modest number of 216 channels. The prevalence of commercial television broadcasters is quite evident, as they command an overwhelming 98.8% of the viewership, leaving only a small portion for TVRI, the national television network in Indonesia.

In the year 2020, Indonesia had a total of 15 national television broadcasters, out of which 14 were under private ownership. These privately-owned broadcasters included Rajawali Citra Televisi (RCTI), Media Nusantara Citra (MNC), Global TV, INews, TVOne, ANTV, SCTV, Indosiar, TransTV, Trans7, NET TV, Kompas TV, MetroTV, and Rajawali TV. The remaining broadcaster, Televisi Republik Indonesia (TVRI), was publicly owned. The study highlights the prevalence of an oligopolistic ownership structure and the politicization of privately owned television broadcasters as factors that raise public apprehension. The media landscape in Indonesia is distinguished by a limited number of influential business magnates based in Jakarta who own concentrated ownership, preserving an oligopolistic framework. The media landscape in this context is dominated by eight corporations, specifically MNC Tbk., EMTEK, Visi Media Asia, Trans Corpora, Media Group, Kompas Gramedia, Jawa Pos Group, and LIPPO Group. These companies exercise substantial ownership control over various media channels, including broadcast, print, the Internet, and social networks. The phenomenon of concentrated ownership extends to various media outlets, significantly impacting editorial decisions to advance their respective political objectives. Table 1 presents a comprehensive analysis of the concentration of media ownership in Indonesia.

Table 1: Media Ownership Concentration in Indonesia In 2020.

Owners	Holding Company	Media Company	Media Institution
Chaerul Tanjung	CT Corp	TransCorp	1. TransTV
			2. Trans7
			3. CNN TV
			4. CNN Online
			5. Detik.com
			6. Transvision (70%)
Hary Tanosoedibjo	Global Mediacom	MNC Tbk	1. MNCTV (10,6)
			2. GTV (6,7)
			3. RCTI (18,4)
			4. iNews (1,5)
			5. RCTI+ (layanan OTT)
			6. Trijaya FM
			7. Koran Sindo
			8. SINDOnews.com

			9.	RDI
			10.	Global Radio
			11.	V-radio
			12.	MNC Vision (96,0)
			13.	MNC Pictures
Eddy Sariatmaja	EMTEK	Surya Citra Media (SCMA) Tbk	1.	SCTV
			2.	Indosiar
			3.	Bangka TV
			4.	Surya Citra Pesona
			5.	Kapanlagi.Com
			6.	Sinemart Indonesia
			7.	O-Channel
			8.	Liputan6.com
			9.	El-Shinta
James Riady	LIPPO Group	Berita Satu Media Holding	1. 2.	Berita Satu TV / Berita Satu Online
			3.	Suara Pembaruan
			4.	First Media
Jakob Oetama	Kelompok Kompas Gramedia	Kompas Group (150 brand media)	1. 2. 3.	Kompas / KompasTV / Kompas.com
			4.	Tribun Group
			5.	Tribunnews.com
			6.	Sonora Radio
			7.	Kontan
			8.	Gramedia Digital
Aburizal Bakrie	Bakrie Brothers	Visi Media Asia	1.	TVOne
			2.	ANTV
			3.	VIVA Networks (digital)
Dahlan Iskan	Jawa Pos	Jawa Pos Group	1.	Jawa Pos
			2.	Jawa Pos TV
			3.	Fajar FM
			4.	Jpnn.com
Surya Paloh	Media Group	Media Televisi Indonesia	1.	Metro TV
			2.	Media Indonesia
			3.	Metrotv-news.com

This extensive desk research sheds light on the media landscape in Indonesia, revealing significant concentration and ownership patterns across various media outlets and platforms. These trends have far-reaching implications for the country's diversity and media independence. The study, conducted between 2018 and 2020, highlights several key findings:

Television Ownership and Audience Share

- According to Nainggolan (2018), three of the eight prominent media corporations, notably MNC, EMTEK, and Visi Media Asia, exert significant control over 75% of the media landscape with respect to coverage area, audience share, and advertising revenue. MNC have substantial influence in the industry, accounting for around 35% of the market share. Following MNC, EMTEK holds a market share of 22.8%, while Visi Media Asia holds a market share of 17.3%.

- The current landscape is primarily characterised by the prevalence of private television broadcasters, among whom TransTV stands out as the leader in audience share, accounting for 17.2%. Following closely behind are SCTV with 16.5% and RCTI with 14.0%. It is worth mentioning that TVOne and Metro TV, two news networks, possess relatively smaller audience shares of 3.1% and 1.6%, respectively.

Kurdish Studies

- According to a survey conducted in 2019, it was observed that specific entertainment channels such as RCTI and Indosiar achieved an audience share of over 10%. In contrast, the sole public channel, TVRI, exhibited a comparatively lower audience share of merely 1%. Despite experiencing an uptick to 4.1% in early 2020, TVRI's share remained marginalised.

Digital Media Advancements

- The proliferation of digital media has provided a favourable environment for private television broadcasters, allowing them to expand their influence through the use of online news websites and popular social media platforms such as YouTube and Facebook. MNC, for example, asserted that its YouTube channel achieved the highest number of viewers and subscribers compared to all other broadcasters.

- The current situation has resulted in a heightened concentration of digital media, wherein most online news portals in Indonesia are under the hands of preexisting media conglomerates. This development has adversely affected endeavours to promote equitable media ownership within the digital domain. The list of the top 10 portals comprises Okezone, Google, Tribun News, YouTube, Detik, Liputan6, Kompas, and Grid.ID, Tokopedia, and Sindo News.

Radio Ownership Patterns

- The radio sector has witnessed comparable patterns of ownership consolidation. The network and local radio channels are predominantly controlled by privately held enterprises primarily owned by media conglomerates in Jakarta. The number of privately owned radio stations has experienced a significant increase, reaching a total of 672 in the year 2015. This figure encompasses 583 stations operating on the FM frequency and 89 on the AM frequency.

- From a geographical standpoint, it is noteworthy that Java accommodates the largest number of radio channels in Indonesia. Specifically, West Java has 120 channels, Central Java has 96 channels, and East Java has 93 channels. The broadcasters above significantly influence audience share and advertising, particularly in prominent urban areas such as Jakarta, Bandung, Yogyakarta, and Semarang, thus marginalizing the national public radio, RRI.

Print Media Outlets

- The distribution of print media, including newspapers and magazines, in Java's major cities is characterised by a reduced level of regional concentration, as the distribution of the media is more equally dispersed. The composition of the seven largest print media firms has remained the same for more than 20 years.

- The decline in the reading of print media has prompted owners to respond by introducing online news platforms to expand their reach to a wider demographic. However, it is worth noting that a significant proportion of Internet news portals in Indonesia are in the ownership of established media companies.

Media Ownership and Politics

- The relationship between ownership concentration and market power is closely intertwined with political aspirations, as evidenced by the direct affiliation of three media tycoons with political parties that endorse President Joko Widodo. The associations above have resulted in substantial news content that predominantly favours their respective political parties and government events, thus constraining the diversity of opinions.

- The media's coverage of political affairs has frequently exhibited a partisan bias, promoting the political interests of media owners while offering limited space for neutral or opposing political perspectives. The influence of this phenomenon is discernible in prominent print publications and widely broadcast television networks at the national level.

- The media landscape in Jakarta exhibits a form of centrism, where most coverage is focused on the Greater Jakarta area. This concentration of coverage tends to reflect opinions and interests that align with Greater Jakarta's priorities rather than those of those dwelling in other regions of Indonesia.

This desk research underscores the growing concentration of media ownership and intertwining media with political interests, which could undermine the diversity and independence in Indonesia. These trends have significant implications for the country's media landscape, raising questions about the role of media in a democratic society and the need for more balanced and diverse media ownership.

Respondent Demographics

The study incorporated a diverse group of respondents, carefully chosen to provide a multifaceted understanding of media diversity within the Indonesian context (see Table 2). These respondents, with distinct affiliations and areas of expertise, offered a rich tapestry of insights pertinent to the research objectives.

The first respondent, R1, represented University A and had a background in media regulation and an academic role. Their hands-on experience in media regulation and academic perspective was invaluable in shedding light on regulatory aspects of media diversity.

R2: *affiliated with a Media Association, demonstrated extensive knowledge of media ownership. Their expertise in this domain offered a comprehensive examination of media ownership as a critical component of media diversity.*

R3: *an active member of an activist group specializing in media advocacy, contributed insights from the advocacy standpoint. Their domain knowledge and active participation in media advocacy were instrumental in understanding the advocacy dimensions of media diversity.*

R4: *associated with University B, uniquely blended journalism and academic background. This respondent's combined expertise in academic research and journalism brought a well-rounded perspective to the research.*

R5: *representing a Regulatory Agency, brought an extensive background in media regulation. As a veteran regulator, they provided crucial insight into the regulatory facets of media diversity.*

R6: *hailing from a Newspaper Company, offered expertise spanning media ownership and editorial roles. Their insights covered both the ownership and editorial dimensions of the media landscape.*

R7: *an academic from University C, specialised in communication. Their academic background and communication expertise contributed a communication-focused perspective to the study.*

R8: *associated with a Media Outlet, excelled in journalism and editorial work. Their expertise in these areas enriched the study by offering valuable insights into journalistic and editorial aspects of media diversity.*

R9: *a researcher from a Research Institute, focused on media research. With a research-oriented perspective and a specialization in media-related research topics, this respondent brought a research-driven angle to the study.*

The meticulous selection of respondents based on inclusion and exclusion criteria ensured that the study benefited from a spectrum of expertise and backgrounds directly relevant to the research objectives. This diversity of perspectives greatly enriched the findings and conclusions of the study, providing a comprehensive view of the diversity of the media in Indonesia.

Table 2: Table of Respondents.

Respondent	Affiliation	Expertise	Inclusion Criteria	Exclusion Criteria
R1	University A	Media Regulation	Media regulation experience, academic role	Inexeperience in media regulation, unrelated expertise
R2	Media Association	Media Ownership	Extensive knowledge of media ownership	Lack of expertise in media ownership, unrelated role
R3	Activist Group	Advocacy	Activist in media advocacy, domain knowledge	No involvement in media advocacy, unrelated expertise
R4	University B	Journalism	Academic and journalism background	Lacks academic or journalism background, irrelevant role

R5	Regulatory Agency	Media Regulation	Regulator, experience in media regulation	Inexeperience in media regulation, unrelated role
R6	Newspaper Company	Media Ownership, Editorial	Expertise in media ownership and editorial	Irrelevant role or no expertise in the designated areas
R7	University C	Communication	Academic with expertise in communication	Lack of academic background or expertise in communication
R8	Media Outlet	Journalism, Editorial	Journalist and editorial expertise	Lack of expertise in journalism or editorial work
R9	Research Institute	Media Research	Researcher in media-related topics	Irrelevant research area or lacking research experience

Thematic Analysis Results

The research employed thematic analysis as the analytical framework to distil meaningful insights and recurring themes from the qualitative data obtained during the interviews. Through rigorous coding and categorization, the analysis revealed several themes that directly illuminate the complex interplay of media diversity and ownership within the Indonesian context.

a. Media Oligopolies and Concentration

Respondents consistently highlighted the domination of media ownership by a select group of conglomerates, including MNC, EMTEK, and Visi Media Asia. These conglomerates wield significant control over Indonesia's media landscape, contributing to an oligopolistic ownership structure. This concentration of ownership was identified as a major impediment to the diversity of the media.

b. Politicisation of the Media

The interviewees emphasised the influence of media owners with political ambitions. They noted how several media tycoons, such as Hary Tanoesoedibjo, Aburizal Bakrie, and Surya Paloh, were directly affiliated with major political parties supporting the incumbent President. This affiliation led to producing news content aligned with their political interests, reducing the media's diversity of opinions and perspectives.

c. Digital Media Advancements

The analysis also revealed the growing impact of digital media on media ownership. Private television broadcasters, particularly, have leveraged digital platforms, such as YouTube and social media, to extend their reach. This digital expansion has further entrenched the influence of conglomerates in the online sphere.

d. Radio Industry Dynamics

Private companies owned by Jakarta-based conglomerates have proliferated in the radio industry, increasing competition with Indonesia's national public radio, RRI. Jakarta and Java have emerged as strongholds for private radio channels, marginalizing the public interest channel.

e. Print Media Landscape

Although ownership concentration in the print media sector was less regionally concentrated, significant ownership patterns persisted. Seven major print media companies have maintained dominance for an extended period, contributing to the country's overall media ownership landscape.

f. Jakarta-Centric Media

Thematic analysis underscored the Jakarta-centric nature of Indonesia's media landscape. Most media outlets, both in terms of headquarters and ownership, are concentrated in Jakarta, leading to a disproportionate focus on the capital's viewpoints and interests. This has implications for media representation and coverage of issues outside Jakarta.

g. Ownership and Political Interests

Respondents consistently raised concerns about the intertwining of media ownership with political interests. They pointed to a situation where media owners' political affiliations influenced news coverage and limited the space for critical and alternative political viewpoints, particularly during elections.

These findings highlight the intricate web of media ownership, politics, and digital advancements in Indonesia, underscoring the challenges in achieving true media diversity (see Table 3). The dominance of a few conglomerates and their political connections have significant implications for the independence and pluralism of the media, raising important questions about the role of media in a democratic society.

Table 3: Thematic Analysis Results.

Theme	Dimension	Quotation
Media Ownership Concentration	Oligopoly	"One of the prominent features we have observed is the dominance of a few conglomerates, creating an oligopolistic environment."
		"It is clear that a small number of media giants control a significant share of the media landscape, giving them immense influence."
Political Influence of Media Owners	Ownership-Politics	"It is evident that some media owners have strong ties to political parties, and this affiliation often translates into producing news content aligned with their political interests."
		"Media owners wielding political power often prioritize their party's interests, which may not always reflect a balanced and diverse media landscape."
Impact of Digital Media	Digital Landscape	"With the rise of digital platforms, especially YouTube and social networks, media owners have found new avenues to reach audiences and promote their content. This has both positive and negative implications."
		"The digital landscape has democratised media to some extent, allowing diverse voices to emerge, but it has also given more power to media moguls who control these platforms. ,,
Radio Industry Dynamics	Radio Concentration	"The radio industry has seen rapid growth in private radio stations, most of which are owned by media conglomerates. This has led to regional radio concentration, especially in cities like Jakarta, Bandung, Yogyakarta, and Semarang."
		"Private radio stations have become the go-to for listeners in urban areas, overshadowing the public radio which used to have a broader reach."
Print Media Landscape	Print Media Expansion	"Print media is less regionally concentrated but still dominated by seven major companies. However, like other media, print outlets have expanded into the digital space to increase their reach."
		"The transition to digital platforms was necessary for print media to remain relevant, and this shift allowed them to attract younger audiences."
Jakarta-Centric Trend	Regional Concentration	"Yes. Media outlets and ownership tend to be concentrated in Jakarta, including the headquarters of most major media conglomerates."
		"This Jakarta-centric trend is concerning because it often leads to news that does not reflect the realities and concerns of people in other regions."
Media Ownership and Political Interests	Ownership-Politics	"The media landscape is intertwined with politics, with media owners often advancing their political interests, particularly during elections. This alignment can limit the diversity of political viewpoints in the media."
		"Media owners with political affiliations prioritize promoting their party's agenda, which may sideline more neutral or alternative perspectives."

Discussion

The discussion begins by triangulating the thematic analysis results, derived from semi-structured interviews, with the desk research findings. This triangulation improves the depth and validity of our understanding of media diversity, ownership concentration, and political implications within the Indonesian media landscape.

Media Ownership Concentration and Oligopoly

Thematic analysis revealed a recurring theme concerning the concentration of media ownership,

corroborated by the desk research findings. Both data sources align in identifying a prevailing oligopolistic environment in the Indonesian media landscape. A limited number of media conglomerates control a substantial share of the media industry, inevitably leading to unequal distribution of power and influence. This concentration contributes to an environment where the media giants wield significant control over content creation, dissemination, and public discourse.

As described in the desk research, the ownership structure of the media outlets reveals a landscape dominated by a handful of conglomerates, including CT Corp, Global Mediacom, and EMTEK. This oligopolistic model is cause for concern, as it often leads to media owners-cum-oligarchs exerting a disproportionate level of influence on media content and public opinion.

Political Influence of Media Owners and Ownership-Politics Nexus

Both thematic analysis and desk research converge on the theme of the close nexus between media ownership and politics. Media owners in Indonesia, as revealed by interviewees and affirmed through desk research, frequently maintain strong affiliations with political parties. The political interests of media owners play a substantial role in shaping the content their media outlets produce.

This fusion of ownership of the media and political affiliation can limit the diversity of political viewpoints presented in the media. Media owners often prioritise promoting their political party's agenda during elections, potentially sidelining more neutral or alternative perspectives. The intertwining of media ownership and politics influences the media landscape significantly.

Impact of Digital Media and Digital Landscape

The influence of digital media on media ownership and diversity emerges as a noteworthy theme. The interviews and desk research highlight that digital platforms, especially YouTube and social media, have become pivotal tools for media owners to reach audiences and promote their content. The transition to digital media has democratised the media landscape, allowing diverse voices to emerge. However, it has also granted more power to media moguls who control these platforms.

The digital landscape enables media owners to connect directly with audiences, thus improving their ability to influence public opinion. Media outlets have ventured into the digital realm, increasing their reach and accessibility, particularly to younger audiences.

Radio Industry Dynamics and Radio Concentration

Our results indicate a pattern of concentration in the radio industry, where private companies dominate the network and local radio channels. As the thematic analysis findings and desk research suggest, private radio stations have expanded significantly over the past decade, especially in urban areas. This growth in private radio stations often overshadows public radio, such as RRI, which once had a more extensive reach.

This concentration raises concerns about the diversity of voices presented to listeners and the influence of media conglomerates over the radio sector.

Print Media Landscape and Print Media Expansion

The print media landscape demonstrates a somewhat distinct trend compared to other media sectors. While ownership is divided among several major companies, our results indicate that print media has expanded into the digital sphere to maintain relevance. The transition to digital platforms has allowed print media to attract younger audiences and adapt to changing media consumption habits.

The expansion of digital platforms by print media signifies an attempt to remain competitive and diverse while confronting the challenge of diminishing readership.

Jakarta-Centric Trend and Regional Concentration

Our thematic analysis and desk research findings reveal a Jakarta-centric trend in the Indonesian media landscape. The concentration of media outlets, ownership, and headquarters in Jakarta underscores the capital city's significance as a media activity hub. Although Jakarta-based media outlets may dominate national discourse, this trend may marginalise the voices and concerns of citizens in other regions.

This Jakarta-centric concentration has implications for the diversity of perspectives and experiences in the media. It raises questions about whether the media genuinely reflects the concerns of the entire nation or if it predominantly echoes the realities of Jakarta and surrounding areas.

Triangulation and Implications

Triangulating the thematic analysis and the findings of the desk research underscores the multifaceted nature of the diversity of the media, the concentration of ownership, and the political implications in Indonesia. The oligopolistic structure of media ownership, its alignment with political interests, and the increasing influence of digital media platforms collectively affect the breadth and depth of voices represented in the media landscape.

The dominance over traditional and digital platforms necessitates careful consideration of media regulation and its role in safeguarding media diversity. Ensuring that diverse perspectives are heard in the media is critical to fostering a more inclusive and balanced democratic discourse. Additionally, efforts to decentralise media ownership and diversify media outlets beyond Jakarta are essential to represent the full spectrum of Indonesian society.

Conclusions

This study comprehensively explores Indonesia's media landscape, unveiling critical dynamics related to media diversity, ownership concentration, and their profound political implications. Through the interplay of thematic analysis and desk research, we have gained a multifaceted perspective on the media environment of the nation.

Our findings emphasize the prominent existence of an oligopolistic structure, where a limited number of media conglomerates, including CT Corp, Global Mediacom, and EMTEK, exercise substantial control over the country's media outlets. This concentration of media ownership threatens the diverse representation of voices in the media, thus affecting democratic dialogue.

One central theme that emerges is the nexus between media ownership and politics. Media owners often maintain strong affiliations with political parties, influencing the content of their media outlets to advance political interests. This intertwining of media ownership and politics may curtail the presentation of diverse political viewpoints, impacting the media's role as a platform for impartial and alternative voices.

The advent of the digital media landscape represents a significant shift. While it has democratised the media landscape, granting diverse voices the opportunity to emerge, it has also intensified the influence of media moguls who control these digital platforms. The role of digital media in the distribution of news content and its impact on audience perceptions is an area that requires careful attention.

The radio industry demonstrates a concentration pattern similar to that observed in other media sectors, overshadowing public radio outlets. The print media industry exhibits different dynamics, with ownership distributed among major companies adapting to shifting media consumption patterns.

A Jakarta-centric trend is apparent, with media outlets, ownership, and headquarters concentrated in the capital city. While Jakarta-based media outlets dominate the national discourse, this trend can marginalize the

voices and perspectives of citizens in other regions, calling for a more inclusive representation of the nation.

This research underscores the critical need for vigilant monitoring and effective regulatory frameworks to protect media diversity. Ensuring that a broad spectrum of voices is heard in the media fosters a robust and inclusive democratic discourse. Efforts to decentralise media ownership and diversify media outlets beyond Jakarta are essential to ensure the media's ability to reflect the concerns and aspirations of the entire nation.

Our findings significantly affect the Indonesian media landscape and its role in a democratic society. They underscore the importance of regulatory measures to ensure media diversity and independence while curbing undue concentration of ownership. Moreover, they highlight the need for transparency in media ownership, especially concerning political affiliations, to maintain public trust in media outlets.

The study's focus on digital media suggests the necessity of monitoring and regulating this evolving landscape, ensuring it serves as a platform for diverse voices and perspectives. In the context of the radio industry, recognising the potential of local and community radio stations to promote media diversity should be a priority.

The Jakarta-centric trend warrants regional media empowerment to represent the diversity of Indonesia more effectively. Supporting regional journalism and media outlets can contribute to a more inclusive national discourse.

While this study provides valuable insights, it is not without limitations. Research inherently relies on existing data sources and interviews with a specific group of stakeholders. It may not capture all nuances and changes in real-time media dynamics. Furthermore, inherent biases in the collected data may influence the study's thematic analysis and desk research approach.

Future research in this domain can further explore the impacts of digital media on audience perceptions and their influence on political dynamics. Comparative studies of media landscapes in different Indonesian regions can shed more light on the Jakarta-centric trend. Investigating the role of social media and citizen journalism in shaping the media environment can be an interesting avenue for research. Furthermore, longitudinal studies can track changes in media ownership and diversity over time, providing valuable insights into the evolving media landscape of Indonesia.

Conflict of interest: The authors declare that they have no conflict of interest.

Authors Contributions: N.E., C.S., M.N.S.A., and W.A.W.M. contributed equally to the conceptualization, methodology, and data collection of this research. J.O. played a significant role in data analysis, interpretation, and manuscript preparation. N.E., C.S., and W.A.W.M. were involved in the critical review and editing of the manuscript. All authors have reviewed and approved the final version of the manuscript for publication.

Informed Consent: Informed consent was obtained from all research participants involved in interviews and the focus group discussion. Participants were informed about the research objectives, data collection methods and handling of their personal information. They provided their written or verbal consent to participate, with the assurance of anonymity and confidentiality in reporting. This study adhered to ethical guidelines and data protection regulations, ensuring the privacy and rights of all participants.

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