

## **Concentration of Media Ownership in Indonesia: A Setback for Viewpoint Diversity**

MASDUKI

Universitas Islam Indonesia, Indonesia

LEEN D’HAENENS

University of Leuven, Belgium

This study seeks to explore the setbacks for viewpoint diversity during and after Indonesia’s 2014 and 2019 presidential elections. Within the context of liberal-democratic Indonesia, it examines the extent to which ownership concentration shapes political viewpoints in news media. Based on document analysis, evidence review, and in-depth interviews with academics, media advocates, and journalists, this study attempts to showcase the interlinkages between media ownership and viewpoint diversity in the Indonesian media market. We argue that media ownership shapes news content in Indonesia’s heavily politicized context. Consequently, areas with highly concentrated media ownership and liberal media policies cannot readily offer diverse political viewpoints in media organizations. Although the influence is not straightforward, a lack of infrastructure for ensuring balance in news media outlets’ ownership limits ownership and viewpoint diversity throughout the Indonesian archipelago. Therefore, strong policies promoting diversity in ownership and in political viewpoints are needed to safeguard the country’s democracy.

*Keywords: media diversity, viewpoint diversity, ownership concentration, news media, oligarchy, Indonesia, journalism, broadcasting, media system*

Over the past 20 years, politicians and influential capitalists have increased their control over Indonesia’s media environment. Most analog media outlets, especially television stations, have become politically affiliated or owned by politicians and incumbent authorities (Lim, 2012; McCoy, 2019; Tapsell, 2015). They exert significant influence over public expression, with their owners’ private interests frequently determining the topics they cover—as especially evident during the 2014 and 2019 elections. Unprofessional activities such as media manipulation and political propaganda have become widespread, thus eroding viewpoint diversity in the news media, increasing citizens’ vulnerability to disinformation, and negatively affecting the country’s democratic struggle.

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Masduki: [masduki@uii.ac.id](mailto:masduki@uii.ac.id)

Leen d’Haenens: [leen.dhaenens@soc.kuleuven.be](mailto:leen.dhaenens@soc.kuleuven.be)

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This article examines the current challenges to Indonesia's media diversity, with a particular focus on viewpoint diversity, which has been eroded by increased ownership concentration and political affiliation, and offers recommendations to improve the current situation. There is a long tradition of studying media ownership in Indonesia using a politicoeconomic approach (Armando, 2014; Lim, 2012; McCoy, 2019; Nugroho, Siregar, & Laksmi, 2012; Tapsell, 2017). Such studies have explored patterns of media ownership in Indonesia, as well as media tycoons' growing political interventions in journalistic contents. Several studies have examined how media oligarchs control their media outlets to support their political ambitions (e.g., Pambudi et al., 2015) while leaving the effects of media control on opinion diversity for further investigation. This study seeks to bridge this gap, with its exploration focusing on Indonesia's 2014 and 2019 elections. It is driven by the need to map media ownership in Indonesia and the extent to which it influences viewpoint diversity within the country's liberal press system.

Using the Indonesian media system as a case in point, this study extends previous studies of media diversity in mature and developing democracies (Hitchens, 2006; Iosifidis, 2010; Lambrecht & Valcke, 2019; Napoli, 2008), as well as media for democracy monitor (Trappel & Tomaz, 2021). The article first examines normative matters of media diversity, opinion diversity, and efforts to measure said diversity. Furthermore, it explores the contemporary Indonesian media landscape, with a strong emphasis on its media ownership situation, with a particular focus on the 2014 and 2019 elections. Finally, it discusses the linkage between diversity in media ownership and viewpoints; it also proposes several recommendations for policy makers and media advocates.

### **The Indonesian Media System**

The instability of the media system in postautocratic Indonesia has drawn the attention of various media scholars (e.g., Jurriens, 2009; McCoy, 2019; Sen & Hill, 2000). They noted that two contradictory political systems have determined Indonesia's media and communication policies. The first occurred during the presidencies of Sukarno and Suharto (1955–1998), which may be collectively labeled as the authoritarian period. The second is the transitional period, which has coincided with Indonesia's shift from an autocratic political system to a democratic one (1998–2020). Historically, the media have been dominated by two nonpublic elements: government intervention and commercial dominance. During the autocratic regime of Suharto (1970s–1990s), state control was dominant; since then, and well into the 2010s, it has been commercial-heavy, with portrayals being dominated by media oligarchs (Nugroho et al., 2012; Tapsell, 2015, 2017).

Following the fall of Suharto's authoritarian regime in 1998, Indonesia was considered an "illiberal democracy" and/or democratic regression (Warburton & Aspinall, 2019) with a transitional-hybrid political regime that encompassed both democratic and authoritarian forms of rule. Facing domestic and global pressure to democratize, President Habibie—Suharto's successor—was able to initiate several new laws to open up the media system. These included the Press Law No. 40 of 1999, which was recognized by prodemocracy actors and media professionals as a significant achievement (Heryanto & Hadiz, 2005). Habibie also established several democratic elements, such as a press council that has become central to the media's self-regulation.

Soon after taking power in October 1999, President Abdurrahman Wahid shut down the Ministry of Information (*Departemen Penerangan*), which had been used by the Suharto regime as its central propaganda and censorship instrument (Kitley, 2000; Sen & Hill, 2000). Wahid and his successor, Megawati Sukarnoputeri (2001–2004), introduced a nonstate broadcast regulator that is responsible for safeguarding public access to broadcast media, monitoring media content, and upholding a professional code of ethics.

Between 2002 and 2019, the Indonesian media system experienced two contradictory conditions. On the one hand, it legally adopted a pluralistic media policy. Broadcast Law No. 32 of 2002 (MCIT, 2019) in particular introduced public and community media models that accompanied incumbent commercial outlets. Freedom of Internet communication and access to public information are provided by the two laws: Public Information Openness Law No. 14 of 2008 and Information and Electronic Transaction Law No. 19 of 2016. However, the owners of the already dominant commercial media opposed this framework. A coalition of media oligarchs and power holders (McCoy, 2019; Tapsell, 2017) were ultimately successful in advocating policies that favored a commercial, Jakarta-centric media environment while marginalizing local (non-Jakarta-based) media.

Armando (2014) described the systematic policy of the Suharto and subsequent governments that encouraged liberalization, in particular, the massive entry of global media to the ownership structure of Indonesian television. He also identified the rapid growth of global advertising as the driver of broadcast marketization, and thus the marginalization of public-oriented broadcasters. From 2016 to 2020, however, the country's media policy did not fully follow the logic of liberalization (Armando, 2014; Tapsell, 2017). Leading up to 2016, promarket policy was accompanied by progovernment policy to regain political control over the broadcast landscape. For instance, in mid-2016, the Indonesian government proposed a new broadcast law that limited power of *Komisi Penyiaran Indonesia* (KPI) to merely supervising broadcast content rather than regulating all issues pertaining to broadcasting. In addition to limiting KPI mandate, this proposal also signaled the strong desire for government intervention in the media, echoing the old autocratic policy. As of 2020, in Indonesia's media landscape, although highly dynamic and manifold, ownership plurality, public access, and media literacy remain critical in both analog and digital media. Moreover, there is a stunning gap in the development and distribution of media ownership and infrastructure between the country's more- and less-developed provinces (Nugroho et al., 2013). Such gaps have affected not only Internet access (and, consequently, the growth of new digital media platforms) but also access to conventional media (such as newspapers and television). For citizens living in remote rural areas, all forms of media are relatively unavailable. Furthermore, although rural and community-based media have grown in number, complicated regulations and limited financial support for quality journalism make it difficult for such media to survive and compete.

We argue that media freedom in Indonesia is still restricted not because of autocratic power but because of new politicians-cum-private media owners and state apparatuses. A survey by Freedom House (2020) still categorizes Indonesia's media as "partly free." Despite the steadily increasing Internet penetration, Indonesians still face obstacles when searching for a truly democratic public sphere. Similarly, a recent survey of Reporters Without Borders (2020) ranked Indonesia 119th out of 179 countries, dropping significantly from its 57th position out of 139 countries worldwide back in 2002.

We agree with Kristiawan (2012) that changes made in the media policy in Indonesia after the Suharto regime supported the growth of private television involving nonmedia capitalists seeking profit maximization first and foremost, rather than disseminating diversity of news and information to the public. This market expansion encouraged concentration of ownership by investors with close relationships to the political power. Such relationships delayed the adoption of pro-media diversity policies in Indonesia.

### **Media Ownership and Diversity of Viewpoints**

In the last 20 years, the notion of "media diversity" has become a central topic in academic discourse as well as a fundamental principle of media democratization in developed and developing democracies. Academic discussions of media systems and their monitoring in developed and developing states often use the term "media diversity" interchangeably with the term "media pluralism" (Hitchens, 2006; Kevin, 2018; Picard, 2000). This implies both internal and external pluralism, with the former referring to diversity in media formats and program types and the latter referring to pluralism in media outlets and ownership. According to McQuail (1992), external pluralism refers to the idea of access, the degree of variation between separate media sources, as well as the availability of separate and autonomous channels in a given society. Internal diversity, meanwhile, refers to opinion diversity—i.e., the depiction of different political and cultural viewpoints—and demography. Hoffmann-Riem (1987) identifies four elements of internal diversity: *formats and issues*, meaning that all fields and topics (entertainment, news, education, and culture) have to be taken into account; *plurality of contents*, meaning that all programs should provide comprehensive and factual coverage of the different opinions in society; *person and group diversity*; and *geographical diversity* (local, regional, supranational; Iosifidis, 2010).

The promotion of "media diversity" or "media pluralism" has long been a primary policy objective of many countries (i.e., those in North America and Europe). For instance, in the 1980s, the U.S. Federal Communications Commission (FCC) developed a media diversity index to address the dangers of concentrated media ownership (Einstein, 2004). This index acknowledged five indicators: viewpoint, outlet, ownership, program, and source. Meanwhile, the European Commission in 2009—acknowledging the necessity of closely monitoring media plurality—commissioned a study to develop a tool to monitor media pluralism in its member states. This ultimately produced the Media Pluralism Monitor (MPM), which deals primarily with the dangers of limited media plurality in a given media market. It includes six key indicators for monitoring media pluralism: basic domain, cultural pluralism, geographical pluralism, pluralism of media ownership and control, political pluralism, and pluralism of media types and genres (Lambrecht & Valcke, 2009; McCann, 2019; Valcke, Sukosd, & Picard, 2016). The concept of media pluralism is perceived as more inclusive and multidimensional than the concept of media diversity. The two concepts have been generally adopted and modified by academics, media advocates, and policy makers outside Europe and North America. They travel to transitional democracies, including Indonesia.

Academic efforts to monitor the performance of news media have grown in Europe over the past 10 years. The Media for Democracy Monitor (MDM) in its consecutive versions—first as a pilot study of five countries carried out in 2010 and published a year later by Trappel and Meier (2011), followed by a second edition covering 10 countries, and a third version published in 2021 spanning 18 mature democracies

(Trappel & Tomaz, 2021)—has developed a set of indicators grounded in normative media and journalism theories and revolving around functions of news media along the triad freedom/information, control/watchdog, and equality/forum. The present study seeks to challenge these academic efforts within a non-Western and postauthoritarian political and media setting, taking Indonesia as a case in point. By casting its lens on media ownership concentration, this research provides an update of commercial dominance and its link to Indonesian electoral politics. Specifically, this research tests the Media Diversity Monitoring Framework (MDMF) produced by UNESCO Jakarta, with a particular focus on two key indicators: ownership diversity and viewpoint diversity.

The MDMF for Indonesia, introduced in 2020 by UNESCO's Jakarta office (Masduki, 2021) and rooted in the tradition of Western democratic media systems, is built around two broad dimensions: politicoeconomic indicators and sociocultural indicators. Politicoeconomic indicators involve the legal context of media diversity, measuring the presence and effectiveness of policies that promote media diversity. It goes beyond the scope of ownership to examine policies about media regulators, ethical codes, and internal charters, which affect the diversity of political viewpoints as well as support for media literacy. Sociocultural indicators, meanwhile, refer to the range of media available to all Indonesian citizens and the factors that affect this range (including funding availability and the existence of broadband Internet infrastructure).

The ownership diversity of media outlets involves not only state and private media actors but also independent and autonomous ones. Using a geographical perspective, the proportion of ownership at the national (in the capital) and provincial levels is also monitored. With reference to Office of Communication (2015), the plurality of actors at the production, supply, and distribution levels (i.e., variety in outlets, suppliers, and distribution platforms) is emphasized. The basic assumption is that a public sphere can be created wherein citizens are offered diverse ideas by guaranteeing access to media operations to diverse cultural, political, and geographical groups.

Another important contribution of the present study lies in its revisiting of macroconceptual approaches offered by Napoli (1999) and by Raeijmaekers and Maesele (2015), who link media diversity and democratic media theory. Napoli (1999), for instance, posits the media diversity discourse within the broader context of the marketplace of ideas. The author understands the former as a policy objective, while the latter is framed as the broader objective of the First Amendment in the United States. Departing from this notion, Napoli (1999) identifies diversity as having three components: (1) source diversity, (2) content diversity, and (3) exposure diversity. These components underscore the urgency of ownership and viewpoint diversity. In line with McQuail (2010), Napoli (1999) assumes a positive correlation among source diversity (ownership and funding), content diversity, and viewpoint diversity. Hence, a causal relationship is implied between the free-market media system (where commercial outlets dominate the media landscape) and diverse media services.

Raeijmaekers and Maesele (2015), meanwhile, explore three democratic theories, each of which implies a different framework for evaluating media diversity: the liberal, deliberative, and agonistic models of democracy. Building on these frameworks, they identify two lenses for media diversity: affirmative and critical diversity. Adopting the affirmative lens, media pluralism is understood as affirmative diversity, with

the media mirroring society and thereby providing a public forum and marketplace. The critical diversity lens, meanwhile, holds that society and media systems are characterized by structural inequalities (mostly economic), and thus commercially oriented operations negatively influence media diversity and representation. Commercial operations must therefore be restricted.

When determining the media's role in democracy and electoral politics, assessing the importance of diverse media ownership and viewpoints—with a strong emphasis on journalistic work—is necessary. In this sense, Baden and Springer (2017) provide two democratic approaches: the liberal representative approach and the liberal participatory approach. In the representative liberal model, the range of legitimate viewpoints refers to the political actors who should be represented in journalistic products. Meanwhile, in the liberal participatory model, nonelite actors' views make an important contribution. Other scholars (e.g., Baden & Springer, 2017; Napoli, 1999; Raeijmaekers & Maesele, 2015; Wilson, Parker & Feinberg, 2020) inform us that media diversity is shaped by broader issues, including the complexities of the political system. Electoral systems built around two parties or blocs may lead to the media becoming politically polarized.

Such binary politics can be seen, for example, in the 2020 presidential election in the United States (Jackson, Coombs, Trevisan, Lileker, & Thorsen, 2020). Examining this political polarization and its implications, Wilson et al. (2020) distinguish among ideological, affective, and false polarization. For instance, false polarization is evident in extreme and egregiously opposite positions that emphasize the worst of the other side while minimizing more mundane policy views. Arguing that most American media are increasingly partisan and thus contribute to the nation's increased polarization, the authors found that institutional polarization (elites, media, and social media) contributes significantly to the public's misperception of divisions within the electorate. Political elites, having become more polarized themselves, are incentivized to stoke polarization among voters. This is compounded by partisan media that portray political opponents in caricatured and polarizing ways, as well as by social media that create a political landscape that reinforces and amplifies extremity and violence.

Deliberative (Raeijmaekers & Maesele, 2015) and liberal participatory frames, meanwhile, remain limited to the academic debate; they have yet to be realized. A liberal participatory media system necessitates the availability of media outlets that are owned/controlled by different corporations/institutions, both domestic and international, with different program mandates, contents, and financial resources. This notion is driven by the idealistic assumption that variety in ownership models, both horizontal and vertical, may inform viewpoint diversity—partly with regard to political issues. Horizontal ownership can be seen in mergers, as in the cases of mono- and multimedia concentration, while vertical ownership is marked by the individual companies or groups exerting control over media production, distribution, and finance (Kumar, 2017).

With this background in mind, this article explores the spectrum of media ownership in Indonesia and its impact on the viewpoint pluralism covered by and represented in the country's mainstream news media. In doing so, it offers a current map of media ownership and viewpoints within Indonesia's liberal press system. To achieve these goals, this article seeks to answer how the current media ownership landscape in Indonesia allows for viewpoint diversity in the country's liberalized and digitalized media system.

### **Method**

This study applies the media diversity monitoring framework designed by UNESCO Jakarta (Masduki, 2021) to examine the Indonesian case. The framework provides several generic indicators of media diversity and helps provide a deeper understanding of media diversity within the polarized electoral politics of Indonesia.

Using a qualitative approach to analyze data compiled through desk research and interviews, this study attempts to showcase ownership and viewpoint diversity in Indonesia while simultaneously investigating the causal relationship between media ownership and viewpoint diversity. It focuses on three aspects: ownership diversity, as a contextual backdrop for the media situation in Indonesia; viewpoint diversity, as a consequential condition of ownership; and the correlation between them. Ownership diversity will be calculated through an overview of existing news media outlets (broadcast, print, and Internet). Viewpoint diversity, meanwhile, will be assessed through an investigation of political viewpoints, with a particular focus on the contestation of pro- and antigovernmental political views.

This study began by identifying the six principal categories of the MDMF (Masduki, 2021): regulatory safeguards, diversity of ownership, diversity of viewpoints, diversity of types and genres, diversity of cultural representations, and diversity of geographical reach. Two diversity indicators (ownership and viewpoint diversity) were subsequently taken to guide the collection of empirical materials and orient the analysis. Documents from state and nonstate media regulatory authorities in Indonesia (i.e., the Ministry of Communication and Informatics [MCIT] and Indonesia's Broadcasting Commission and Press Council) were collected. The author also collected annual reports from associations of newspaper companies, commercial television reports, and academic studies by Indonesian and non-Indonesian researchers. To help understand the political and economic environment in which Indonesia's media and political systems exist, the author conducted semistructured interviews with academics, media regulators, activists, and journalists in Jakarta and Yogyakarta in 2019 and 2020. To discuss the initial findings, a focus group discussion was also organized with media advocates, regulators, and journalists.

For analysis, the researcher began by mapping media ownership in Indonesia for the 2014–2020 period as a key issue. Other factors considered included state, public, private, and community (local, national) ownership of terrestrial television and radio broadcasters, as well as audience shares in terrestrial television and radio. The researcher also assessed regulatory safeguards related to media ownership and control in Indonesia, as well as transparency in ownership structure and funding. Finally, this study examined the link between media ownership and the political viewpoints espoused by the broadcast, print, and Internet news media outlets within the context of Indonesia's growing political polarization. This facilitated analysis of viewpoint diversity, understood as the representation of political viewpoints and interests in the media, be they those of political actors or members of the public.

### **Findings and Discussion**

Overall, this study finds a strong link among media ownership concentration, media politicization by owners-cum-oligarchs on the one hand and the limited range of political viewpoints in the media on the

other. This study also finds a causal relationship between the political polarization experienced during Indonesia's 2019 election and the polarization of public opinion, particularly about the two presidential candidates. More generally, this study shows that the application of a liberal media system has limited alternative political voices rather than fostered deliberative democratic expression.

Broadcast Law No. 32 of 2002 identifies media diversity as one of its paramount goals and accepts public and community broadcasters as well as the commercial outlets that dominate Indonesia's media landscape. The law emphasizes two aspects—diversity of ownership and diversity of content/viewpoints—as key indicators for understanding media diversity in Indonesia. Our findings support those of several media observers (e.g., Gazali, 2014; Nugroho et al., 2013; Tapsell, 2017) who find that these two aspects are threatened by media politicization and political polarization.

However, we found since November 2002, when the Broadcast Law No. 32 was issued, the Indonesian media environment has experienced two critical situations: first, concentration of media ownership among media conglomerates operating in the capital, Jakarta, and second, strong intervention in media newsrooms by conglomerates seeking political power. Based on media availability and geographical distribution, this study finds that Indonesian media development is highly Jakarta- or Java-centric in terms of ownership and content. Most types of media organizations have headquarters in Jakarta and are owned by private entities. For instance, although there were 1,251 public, private, paid, and community television broadcasters across Indonesia in 2020 (MCIT, 2020), the majority were located in and around the Jakarta area.

Using available documents (i.e., 2017 KPI report; 2020 MCIT report; and the annual reports of private broadcasting corporations), we found that ownership diversity is lacking in the media. Although current law provides the necessary framework for broadcast pluralism through the equal protection of public, commercial, community, and paid broadcasters, in practice there is significant inequality in the licensing of broadcast operators. Around Indonesia, 689 national and regional channels are used by commercial broadcasters; for comparison, there are only 130 public broadcasters. Community radio and television are similarly limited, occupying only 216 channels. Several reports (i.e., Komisi Penyiaran Indonesia, 2017; MCIT, 2020; Nielsen Media Research, 2019) show that private television has a 98.8% audience share; the remainder is for TVRI, the Indonesian public television.

As of 2020, Indonesia had 15 national television broadcasters; 14 were privately owned (Rajawali Citra Televisi/RCTI; Media Nusantara Citra/MNC; Global TV, INews; TVOne; ANTV; SCTV; Indosiar; TransTV; Trans7; NET TV; Kompas TV; MetroTV; Rajawali TV), and one (Televisi Republik Indonesia/TVRI) is publicly owned. The oligopolistic ownership model and politicization of private television broadcasters have been causes of public concern. Nainggolan (2018), Tapsell (2015), and Widyatama (2018) all noted that Indonesia's commercial broadcasters are oligopolistic, with ownership centralized among a few business tycoons in Jakarta. These private broadcasters—and almost all media platforms (broadcast, print, Internet, social media platforms)—are owned by only eight conglomerates: MNC Tbk., EMTEK, Visi Media Asia, Trans Corpora, Media Group, Kompas Gramedia, Jawa Pos Group, and LIPPO Group. These eight groups are media oligarchs who not only own a range of media but also shape journalistic decisions to further their political ambitions (Kononczuk, Cenusu, & Kakachia, 2017; Robison & Hadiz, 2014). Table 1 further details the concentration of media ownership in Indonesia.



**Table 1. Media Conglomerates in Indonesia in 2020.**

Owners	Holding Company	Media Company	Media Institution
Chaerul Tanjung	CT Corp	TransCorp	<ol style="list-style-type: none"> <li>1. TransTV</li> <li>2. Trans7</li> <li>3. CNNTV</li> <li>4. CNN Online</li> <li>5. Detik.com</li> <li>6. Transvision (70%)</li> </ol>
Hary Tanosoedibjo	Global Mediacom	MNC Tbk	<ol style="list-style-type: none"> <li>1. MNCTV (10,6)</li> <li>2. GTV (6,7)</li> <li>3. RCTI (18,4)</li> <li>4. iNews (1,5)</li> <li>5. RCTI+ (layanan OTT)</li> <li>6. Trijaya FM</li> <li>7. Koran Sindo</li> <li>8. SINDOnews.com</li> <li>9. RDI</li> <li>10. Global Radio</li> <li>11. V-radio</li> <li>12. MNC Vision (96,0)</li> <li>13. MNC Pictures</li> </ol>
Eddy Sariatmaja	EMTEK	Surya Citra Media (SCMA) Tbk	<ol style="list-style-type: none"> <li>1. SCTV</li> <li>2. Indosiar</li> <li>3. Bangka TV</li> <li>4. Surya Citra Pesona</li> <li>5. Kapanlagi.Com</li> <li>6. Sinemart Indonesia</li> <li>7. O-Channel</li> <li>8. Liputan6.com</li> <li>9. El-Shinta</li> </ol>
James Riady	LIPPO Group	Berita Satu Media Holding	<ol style="list-style-type: none"> <li>1. Berita Satu TV</li> <li>2. Berita Satu Online</li> <li>3. Suara Pembaruan</li> <li>4. First Media</li> </ol>
Jakob Oetama	Kelompok Kompas Gramedia	Kompas Group (150 brand media)	<ol style="list-style-type: none"> <li>1. Kompas</li> <li>2. KompasTV</li> <li>3. Kompas.com</li> <li>4. Tribun Group</li> <li>5. Tribunnews.com</li> <li>6. Sonora Radio</li> <li>7. Kontan</li> <li>8. Gramedia Digital</li> </ol>

Aburizal Bakrie	Bakrie Brothers	Visi Media Asia	<ol style="list-style-type: none"> <li>1. TVOne (43 stasiun)</li> <li>2. ANTV (44 stasiun)</li> <li>3. VIVA Networks (digital)</li> </ol>
Dahlan Iskan	Jawa Pos	Jawa Pos Group	<ol style="list-style-type: none"> <li>1. Jawa Pos</li> <li>2. Jawa Pos TV</li> <li>3. Fajar FM</li> <li>4. Jpnn.com</li> </ol>
Surya Paloh	Media Group	Media Televisi Indonesia	<ol style="list-style-type: none"> <li>1. Metro TV</li> <li>2. Media Indonesia</li> <li>3. Metrotv-news.com</li> </ol>

(Source: Nainggolan, 2018; Tapsell, 2017; updated in 2021)

Of the eight media conglomerates, three—MNC, EMTEK, and Visi Media Asia—control 75% of the coverage area, audience share, and advertising revenue (Nainggolan, 2018). More specifically, MNC controls about 35% of the market, followed by EMTEK (22.8%), and Visi Media Asia (17.3%). TransTV has the highest audience share among private broadcasters (17.2%), followed by SCTV (16.5%) and RCTI (14.0%). Two news channels, TVOne and Metro TV, have audience shares of 3.1% and 1.6%, respectively. A survey conducted in 2016 found that several entertainment channels (including RCTI and Indosiar) had audience shares of more than 10%, while TVRI—the only public channel—had only a 1% audience share (Nielsen Media Research, 2019). In 2019, NMR reported that TVRI's average audience share from 2017–2019 remained relatively stable, at 3.5%. By way of comparison, the private television broadcasters SCTV, RCTI, and ANTV had shares of 15.2%, 13.3%, and 12.8%, respectively. By early 2020, TVRI—which had 32 regional branches—has increased its audience share to 4.1%, but it remained marginalized.

Advances in digital media since 2016 to date have primarily benefited the owners of private television broadcasters, which have begun sharing their news content through Internet news websites and social media platforms such as YouTube and Facebook. In its 2019 report, to illustrate, MNC claimed that its YouTube channel had the highest number of viewers and subscribers of all broadcasters, including RRI and TVRI.

Similar gaps in ownership and audience share have emerged in the radio industry over the past 10 years, wherein private companies dominate both network and local radio channels. The number of private radio stations, operating in direct competition with Indonesia's national public radio (RRI), has increased rapidly. In 2015, Indonesia was home to 672 private radio stations, consisting of 583 FM radio broadcasters and 89 AM radio broadcasters. As in the television sector, most radio broadcasters are owned by Jakarta-based media conglomerates, including the eight media tycoons mentioned above. According to several published documents (the PRSSNI report, the annual reports of commercial broadcasters, the 2020 MCIT report), five media groups rule the radio industry: CPP, MNC, Sonora, Mahaka Radio Integra/MARI, Mugi Rekso Abadi/MRA.

From a geographic perspective, Media Scene (2015) reported that Java is home to the majority of Indonesia's radio channels: West Java has the most (120), followed by Central Java (96) and East Java (93). These broadcasters are dominant in terms of audience share and advertising. In major cities such as Jakarta, Bandung, Yogyakarta, and Semarang, private radio channels have long dominated audiences,

thereby marginalizing RRI. Between 2010 and 2014, Jakarta's five favorite radio stations were Gen, Bens, Elgangga, Elshinta, and RDI; in Bandung, the five largest channels were Dahlia, Rama, Ardan, Cosmo, and Cakra; and in Semarang, the largest channels were Pop, KIS, Voice of Semarang, Gadjah Mada, and Imelda. In Yogyakarta, the five famous channels are commercial- and entertainment-oriented stations; RRI's position as the public interest news channel is marginal.

Ownership patterns are somewhat less regionally concentrated in print media outlets (newspapers and magazines), as media distribution is equal among the major cities of Java. However, as print media are unregulated, concentration has become evident over a longer time than television. The seven largest print media companies in Indonesia (*Serikat Perusahaan Pers*, 2020)—Kompas Group, Jawa Pos Group, Republika, Media Indonesia, Kedaulatan Rakyat, Suara Merdeka, and Pikiran Rakyat—have remained unchanged for 20 years.

As with radio audiences, print media audiences have decreased over time. Data from *Badan Pusat Statistik* (2015) show that media readership decreased from 23.70% in 2003 to 17.66% in 2012. Print media owners, as with commercial television broadcasters, have thus developed their own online news platforms to increase media penetration. Consequently, although independent websites have also emerged, most online news portals in Indonesia are owned by existing media conglomerates. According to Alexa Internet, Inc. (2020), Indonesia's five most popular news portals are owned by existing broadcasters and/or newspaper publishers. This has had negative implications for efforts to develop equal media ownership in Indonesia's digital media landscape; the top 10 portals are Okezone, Google, Tribun News, YouTube, Detik, Liputan6, Kompas, Grid.ID, Tokopedia, and Sindo News. Trends in Internet usage have changed little between 2018 and 2020.

At this point, Indonesia's media industry has become increasingly concentrated across all media outlets and platforms. While private broadcasters are dominant, public and community media are marginalized. Returning to the MDMF, no media ownership diversity can be found in Indonesia. This study's desk assessment further confirmed that such excessive ownership concentration and market control are intertwined with political ambition. Overall, we agree with the observations of Dhyatmika (2014) and our informants: Media ownership intertwines with politics in ways that make for a hostile news media effect. Mainstream and Jakarta-based news outlets provide less space for critical news, and when journalists do take on critical political topics, they play it safe, avoiding stories that could stir animosity from media owners-cum-politicians.

Between 2018 and 2020, the commercial broadcast owners—including those of MNCs—were directly affiliated with the major political parties that supported President Joko Widodo. Three media tycoons (Hary Tanoesoedibjo, Aburizal Bakrie, and Surya Paloh) chaired their own political parties: the Perindo Party, Golkar Party, and Nasdem Party, respectively. During the 2014 and 2019 presidential elections, these tycoons' media groups extensively produced news that supported their political parties and government events, thereby undermining opinion diversity (Nainggolan, 2018; Tapsell, 2017).

Between 2011 and 2014, media coverage of political matters tended to be partisan and advanced media owners' political interests (Pambudi et al., 2015). There was no room for neutral/alternative political

views in the four major newspapers: *Jawa Pos*, *Media Indonesia*, *Kedaulatan Rakyat*, and *Media Indonesia*. The popularity of major political parties such as Golkar and Nasdem has similarly been shaped by powerful media elites such as Abu Rizal Bakrie and Surya Paloh, who own national television media (TVOne and Metro TV) and newspapers (such as Media Indonesia) and can thus shape political opinions during elections through news and nonnews packages (Arifuddin, 2016). Moreover, a study of television news content by Heychael and Wibowo (2014) pointed at a Jakarta centrism in Indonesia's media offices: Most coverage is concentrated in the Greater Jakarta area (73%), followed by East Java (3%), West Java (2%), and Central Java (2%). When Jakarta-based media embrace political views, they tend to represent the viewpoints and interests of those in Greater Jakarta (*Jabodetabek*) more than those of citizens elsewhere.

During both the 2014 and 2019 presidential elections, diverse political viewpoints were extensively reduced to divide citizens along binary lines based on their support for Joko Widodo or Prabowo Subianto. For instance, during the 2014 election, two leading television news channels, TVOne and MetroTV, unabashedly focused their coverage on their favored candidates: Prabowo Subianto and Joko Widodo, respectively. In doing so, these broadcasters used diverse approaches, including news bulletins, analyses, talk shows, and political advertising. They blocked not only public voices that opposed their candidates but also neutral ones that tended to be more rational. Media broadcasters were thus exploited, through their framing and delivery of information, to win voter support. Similarly, many leading newspapers campaigned for one specific candidate rather than providing a public space for all political opinions. Tapsell (2015) noted, for example, that *The Jakarta Post* (Indonesia's leading English-language daily newspaper) ran editorials and news coverage that endorsed Joko Widodo during the 2014 presidential election.

Similarly, in the run-up and after Indonesia's 2019 elections, there was growing polarization over the prevalence of identity politics (Tapsell, 2021) as well as misinformation about Joko Widodo and Prabowo Subianto (Mujani & Kuipers, 2020). As noted by Soderborg and Muhtadi (2021), the polarization stemmed in part from the two figures' opposite positions on religious questions. The race was divisive, with Prabowo mounting a populist campaign that leveraged Islamist militants and worked diligently to spread rumors (Mietzner, 2014). The rumors focused on conspiracy theories that Widodo was secretly a Christian and controlled by a group of Chinese media tycoons. For comparison, in the 1999 and 2004 elections, political contestations had been characterized by opposite ideological streams (i.e., Islamist and nationalist), while the 1955 election had been marked by much more extreme division (Aminuddin, 2016).

Such politicization of the media, as well as the accompanying polarization of opinions, was particularly prominent on digital media platforms. The emergence of partisan news sites and social media indicates a shift in the politicization of Internet media, one that runs contrary to the value of opinion diversity (Agus Sudibyo, personal communication, August 10, 2021).

Given that Indonesia is home to more than 175 million Internet users, Internet news sites and social media have become integral parts of political campaigns in the country to the extent that Indonesia's two most recent elections (2014 & 2019) have been described by some as "social media elections" or "clicking democracy" (Gazali, 2014). Digital media have become increasingly important for discussing political issues, both privately through WhatsApp and publicly through popular news sites as well as Facebook and Twitter, alongside traditional media outlets (Johansson, 2016). Lim (2017), however,

describes the widespread consumption of Internet news and use of social media platforms as offering users the “freedom to hate,” which—in conjunction with the use of hoaxes, disinformation, and paid trolls or “buzzers”—limits the quality of political viewpoints as well as media diversity. Since mainstream media tended to favor Joko Widodo in Indonesia’s 2019 presidential election, social media platforms were arguably more important for most opposition political leaders. Nonetheless, the incumbent still dominated Twitter accounts, having 11.1 million followers to Subiyanto’s 3.7 million (Irawanto, 2019).

Within the context of Indonesia’s 2019 elections, Maulana and Situngkir (2020) examined the impact of social media and online news media on the emergence of extreme polarization in political discourse. Examining the news consumption patterns of Twitter users during the elections, they found that Indonesia’s news media landscape was politically fragmented, with each media community becoming a political echo chamber for its audience. Confirmation bias and selective exposure were two main factors behind these social media dynamics, which over time divided social media into politically homogeneous user communities. At the same time, however, the study revealed differences in supporters’ echo chambers. Prabowo-leaning media were dominated by segmented news media, such as Islamic news portals (e.g., *eramuslim*, *portal-islam*, *Republika*), and opposition media (e.g., *Viva*). Mainstream media (*Kompas*, *Jakarta Post*) tended to be neutral or favor Joko Widodo.

However, the concentration of media ownership and media politicization are not the sole factors contributing to the homogenization of political viewpoints in the media. The lack of viewpoint diversity is also a consequence of political polarization in Indonesia’s illiberal political system. Assessing Indonesia’s political system, particularly the electoral system used since the country began its political reform in 1998, there is scholarly consensus that the democratic political system is still in its infancy. Scholars such as Warburton and Aspinall (2019) classify Indonesia as a regressive democracy, characterized by the predominance of personalities instead of organized political parties. This led to the polarization of political elites and members of the public in the 2014 and 2019 elections.

Liddle, Mujani, and Ambardi (2018) show that leadership remains dominant in most of Indonesia’s political parties, and thus parties’ characteristics are shaped by their leading figures. Similarly, Tan (2020) finds that the institutionalization of political parties remains weak, as strong personal figures (the president, local government executives) remain influential. Moreover, most of the political parties that emerged in the 2010s were developed by the political elites to fulfill the ambitions of themselves or their oligarchs.

To some extent, the Jakarta-centric concentration of media ownership and political viewpoints could be ideally countered by the development of local, public, and community media and journalism. The media diversity promised by the 2002 Broadcast Law No. 32, as well as the migration to digital frequencies, could similarly offer space for alternative news media outlets across the archipelago. Local news, meanwhile, could counter the nationwide political polarization of Indonesia’s news services. Nevertheless, significant obstacles remain in developing public channels capable of rivaling commercial ones.

The ongoing struggle to develop local commercial and community/nonprofit broadcasters and implement a network broadcast system policy has been hampered by critical conditions: limited sources of advertising income (the lifeblood of the media) as well as the fast and attractive news formats provided by

the Jakarta-based broadcasters. Moreover, the implementation of a network broadcast system has been continually thwarted by the owners of Indonesia's dominant media conglomerates (Armando, 2014).

The rapid growth of Internet news sites, which offer free access to news coverage, as well as the recent COVID-19 pandemic of 2020–2021 has significantly affected commercial and community media services. Local media are the most vulnerable in this respect. For instance, of the 434 members of the Association of Newspaper Companies, 47.1% have experienced multiple financial crises, mainly caused by decreased advertising revenues. Alternative sources of funding are needed. However, the ruling government has not provided sufficient financial support through the state budget, even though the Indonesian Press Council and 12 media companies/journalist associations have sought state subsidies to ensure stability in their journalistic services (CNN Indonesia, 2020).

Finally, to remedy the shortcomings in opinion diversity, Indonesia's public service radio (Radio Republic of Indonesia) has developed several Internet platforms, including RRIPlay Go. Referring to Ramsey's (2010) thoughts on the public sphere, RRI has yet to take advantage of its digital and social media platforms or position itself as a potential arena for online public engagement. In practice, these platforms continue to maintain RRI's classic role as a space for political officials rather than the public. The rise of digital platforms, thus, has not been accompanied by the increased involvement of the public in the processes of deliberation and opinion formation. Likewise, RRI's platforms have not been directly linked to the idea of public participation in content production, but rather sought to maintain the broadcaster's linkages with political authorities (Masduki, 2019). For more than 75 years of Indonesian national service, RRI has predominantly been an analog-terrestrial audio broadcaster. Online and digital platforms emerged only in the past 10 years as an extension of analog services rather than offering new and special content.

From a regulatory perspective, protection over public interest news media in Law 32/2002 and its subsequent policies is very weak. Several policies issued from 2003 to 2020 show the marginalization process of the two public media institutions: RRI and TVRI. For example, Government Regulations 12 and 13 of 2005 allocate only 20% of the frequency quota for RRI and TVRI, in contrast with its counterparts in the UK (BBC) and Japan (NHK), which receive more than 40%. The same is experienced by community radio, which receives only three frequencies. The rest are offered to private channels. In the content production, Indonesian politicians keep intervening in the operation of RRI/TVRI through their positions as state budget providers (Masduki & Darmanto, 2014).

### **Conclusions**

This study showed that the rapid growth of Indonesian media institutions between 2011 and 2020, in conjunction with the current legal framework for media freedom, could have been favorable for creating media and viewpoint diversity. However, continued monopolistic media ownership and partisan political news content have proved to be significant obstacles. The introduction of media diversity policies (i.e., the Press Law and Broadcast Law in 1999 and 2002), as well as civil society efforts to campaign for ownership and opinion diversity, has been hampered by tycoons and oligarchs in almost all media sectors. Likewise, the legal provisions for media diversity set by Law No. 32 of 2002 have been used to ensure the continued dominance of Jakarta-centric content and ownership.

Hence, media and viewpoint plurality in Indonesia are at risk, mainly because of high levels of media ownership concentration. Only eight companies dominate the broadcast and print media sectors, while public and community media services remain weak. Moreover, the ownership of television broadcasters is highly monopolistic and Jakarta-centric, while radio and newspaper media are Java-centric. RRI and TVRI, though legally identified as PSBs, are marginal both in their number of outlets and in their audience shares. This problem has been exacerbated by increased conglomeration and platform convergence (print, broadcasting, and Internet), with proprietors who previously owned only one platform (such as print, radio, or television) now building large, powerful, multiplatform oligopolies.

This study also showed that media oligarchs-cum-politicians have exerted control over their media newsrooms, and this has stimulated intervention in journalistic practices. Indonesia's media landscape remains dominated by privately owned channels, which produce mostly commercial and entertainment content and which have headquarters in Jakarta (or, more generally, Java). There remains a significant gap in the distribution of media outlets and political coverage between Java and Indonesia's other islands.

This study has tested the relationship between media ownership concentration, media politicization, political polarization, and the limitation of political viewpoints. Applying the MDMF to the Indonesian context, this study answered a long-standing question about the impact of media ownership concentration and media politicization on viewpoint diversity. It has shown that the polarization of viewpoints during the electoral dynamics of 2014 and 2019 has been shaped by media ownership concentration. At the same time, the diversity of political viewpoints in media coverage has been reduced by the systematic polarization of the public during the 2014 and 2019 elections. This study, therefore, emphasizes the importance of empowering the mainstream media as a means of bridging diverse political echo chambers, such as those active on social media platforms.

At the same time, however, it must be acknowledged that political viewpoints in the media are likely to remain polarized as long as media politicization and polarization continue to be prominent in Indonesia. Digital technology can increase individual citizens' exposure to information from various perspectives; however, the mediation and personalization of information within social media networks can potentially result in citizens being exposed only to specific information with which they agree.

In conclusion, to ensure viewpoint diversity, a structural regulatory approach is necessary, as regulation is the only sustainable way to provide minority audiences with a stable and diverse access to media content. A policy aimed at enhancing source/ownership diversity in media outlets and programs should be implemented, under the general assumption that increasing viewpoint diversity is necessary for Indonesia's deliberative and liberal participatory model of democracy. Indonesia's media ownership patterns are indicative of a liberal representative model (Baden & Springer, 2017) that hinders the use of deliberative and participatory approaches to political communication in the news media (both analog and digital). In this sense, the liberal media policy should aspire at a deliberative media model, one that promotes equality in media services. Only that provides a fertile context in which real political viewpoint diversity can be realized.

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