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Fulfillment of Local Content in The Era of Democratization and Digitalization In West Java

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ABSTRACT

This study examines how networked broadcasters in West Java, Indonesia, implement a national policy mandating a minimum of 10% local content. Drawing on in-depth interviews with editorial, production, and managerial staff, combined with regulatory data, the study analyzes production and distribution practices through a political economy of communication perspective, focusing on structuration, commodification, and spatialization. The findings reveal that most "local content" is produced in Jakarta for cost efficiency and centralized control, while local bureaus contribute only a small portion of broadcast material. Media organizations adopt different structuring patterns: community-oriented autonomy (as in Radio Elshinta), a central-local hybrid format (as in MNCs), and top-down coordination (as in CNN West Java). These practices demonstrate how ownership concentration, resource inequality, and regulatory formalism shape local broadcasting, turning compliance into a symbolic, rather than a substantive, tool of democracy. Theoretically, this study extends political economy analysis by applying it to the dynamics of subnational broadcasting, demonstrating how structure and agency interact in peripheral media spaces. Globally, these findings highlight how centralized media systems in developing democracies struggle to balance regulatory objectives with commercial imperatives—an issue relevant to debates on media pluralism, decentralization, and cultural representation beyond Indonesia. This research provides empirical and conceptual insights into how local media policies operate within broader political-economic structures.

Keywords: Indonesian Broadcasting Commission, local content, network media

ABSTRAK

Studi ini mengkaji bagaimana lembaga penyiaran berjaringan di Jawa Barat, Indonesia, menerapkan kebijakan nasional yang mewajibkan minimal 10% konten lokal. Berdasarkan wawancara mendalam dengan staf redaksi, produksi, dan manajerial, yang dipadukan dengan data regulasi, penelitian ini menganalisis praktik produksi dan distribusi melalui perspektif ekonomi politik komunikasi, dengan fokus pada strukturasi, komodifikasi, dan spasialisasi. Temuan penelitian mengungkapkan bahwa sebagian besar "konten lokal" ternyata diproduksi di Jakarta dengan alasan efisiensi biaya dan kendali terpusat, sementara biro lokal hanya menyumbang sedikit sekali materi siaran. Organisasi media mengadopsi pola strukturasi yang berbeda: otonomi berorientasi komunitas (seperti di Radio Elshinta), format hibrida pusat-lokal (seperti di MNC), dan koordinasi atas-bawah (seperti di CNN Jawa Barat). Praktik-praktik ini menunjukkan bagaimana konsentrasi kepemilikan, ketimpangan sumber daya, dan formalisme regulasi membentuk penyiaran lokal, mengubah kepatuhan menjadi alat demokrasi yang simbolis, alih-alih substantif. Secara teoretis, studi ini memperluas analisis ekonomi politik dengan menerapkannya pada dinamika penyiaran subnasional, menunjukkan bagaimana struktur dan agensi berinteraksi dalam ruang media perifer. Secara global, temuan ini menyoroti bagaimana sistem media terpusat

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di negara-negara demokrasi berkembang kesulitan menyeimbangkan tujuan regulasi dengan tuntutan komersial—sebuah isu yang relevan dengan perdebatan tentang pluralisme media, desentralisasi, dan representasi budaya di luar Indonesia. Penelitian ini memberikan wawasan empiris dan konseptual tentang bagaimana kebijakan media lokal beroperasi dalam struktur politik-ekonomi yang lebih luas.

Kata Kunci: Komisi Penyiaran Indonesia, konten lokal, media jaringan

INTRODUCTION

Significant transformations in the Indonesian media landscape after the 1998 reform have been characterized by democratization and media pluralism, which opened opportunities for broader participation in media production, including at the local level (Sujoko & Haboddin, 2020). The liberalization of the broadcasting sector enabled the emergence of various private television and radio stations, breaking the state's long-standing control during the New Order period and fostering more diverse content flows (Wuryanta, 2023). However, this shift was not merely a transition from state to market; it also reconfigured the political-economic structure of the media industry, allowing large private conglomerates to dominate ownership and shaping the conditions under which local voices could—or could not—enter the broadcasting arena (Eddyono, 2020). In this context, democratization created both institutional space for local content and structural pressures that limit genuine local representation.

To govern this rapidly changing media environment, the government enacted Law Number 32 of 2002 on Broadcasting, supported by the establishment of the Indonesian Broadcasting Commission (KPI), which introduced regulations designed to balance national integration with local diversity (Septiari, Sunarto, & Nugroho, 2024). A key regulatory innovation was the introduction of a network broadcasting system and the 10% local content requirement, intended to strengthen local identity and ensure that communities across Indonesia could access media content reflecting their realities. KPI plays a crucial role in supervising implementation, but the interaction between democratization, regulatory ideals, and the political economy of media ownership has created tensions. While regulations formally guarantee space for local content, concentrated ownership and centralized production practices have shaped how these policies are realized in practice.

Building on this regulatory foundation, the government introduced the Network Broadcast System (Sistem Stasiun Jaringan/SSJ) as a mechanism intended to decentralize content production and ensure more equitable information distribution across Indonesia. The system requires collaboration between national and local broadcasters, with local stations expected

to contribute programs relevant to their communities (Asmara, 2024; Shabana, 2019). In principle, SSJ is designed not merely as a technical broadcasting structure but as a policy tool to democratize media flows, enabling local perspectives to stand alongside national narratives. To operationalize this ideal, PP Number 50 of 2005 and KPI guidelines mandate that at least 10% of total airtime must be allocated to local content, encompassing news, culture, and community events that reflect local identities (Hikmat et al., 2019; Hendrawan, 2013). Earlier research has highlighted that this policy aims to strengthen media pluralism by balancing national and local perspectives (Nugroho, Amalia, & Laksmi, 2012; Rahmayani, 2023).

However, the practical effectiveness of this policy has been contested, and empirical research on its implementation remains limited. Studies and monitoring reports indicate that national content still dominates airtime, and local content is frequently produced by national stations merely to fulfill regulatory quotas, raising doubts about authenticity and local relevance (Telkmann, 2021; Myers & Harford, 2020). Moreover, KPI's supervisory capacity—both at the national and regional levels—faces structural limitations, including uneven enforcement and lack of standardized monitoring mechanisms (Mairita, Tazri, & Sumayah, 2021). These issues point to a gap between regulatory intent and implementation, and little research has examined how institutional power, ownership structures, and market pressures interact to shape these outcomes.

These regulatory challenges are inseparable from the political economy of media, which provides a critical lens to analyze how economic concentration, political lobbying, and regulatory design intersect in shaping media practices (Khoirunnisa & Rusadi, 2023; Imsar & Husaini, 2023). Drawing on Vincent Mosco's (2004) framework of structuration, commodification, and spatialization, previous scholarship has focused mainly on national-level ownership and content flows (Fuchs, 2024; Yuliani, 2020). What remains underexplored is how these dynamics play out at the sub-national level, particularly in relation to SSJ implementation and the 10% local content policy. This study addresses that gap by analyzing the structural tensions and practical negotiations between regulatory frameworks and media institutions in West Java.

In this context, structuration offers a crucial analytical lens to understand how broadcasters operate within the tension between institutional structures—such as regulation, ownership patterns, and economic resources—and agency capacities, including organizational decisions, local production strategies, and adaptation to commercial pressures. The production and distribution of local content are shaped not only by formal regulations but also by how media institutions structure their workflows, production hierarchies, and

distribution networks in response to broader political–economic dynamics. Examining structuring patterns is therefore essential to reveal how local content obligations are translated into everyday broadcasting practices, often producing outcomes that diverge from regulatory ideals.

A key manifestation of these dynamics is the centralization of media production in Jakarta, which mirrors broader debates on media imperialism and center–periphery relations in global media studies. Much of the so-called “local content” is produced centrally for national markets, overlooking regional cultural diversity (Maryani, Priyadharma, Janitra, & Rahmawan, 2020). National networks often package short cultural segments in Jakarta rather than enabling local stations to produce original programs, thereby reproducing symbolic forms of localization while maintaining centralized control—similar to how global media corporations adapt content superficially to local contexts.

This process is reinforced by structural disparities: producing local programs incurs higher logistical costs, especially outside Java, compared to the economies of scale achieved through centralized production. Additionally, advertising revenue structures privilege national networks, with their larger audiences and prime-time slots (Sutarini, 2019; Armando, 2011), making genuine local content economically less attractive. Unequal distribution of financial and infrastructural resources further entrenches these inequalities, creating a vicious cycle where low investment leads to lower quality and reduced audience appeal, which in turn limits future investment.

Despite regulatory frameworks mandating 10% local content, what remains underexplored is not merely the administrative compliance with quotas, but the communicative implications of these structural arrangements. There is limited empirical research on how local broadcasters—particularly in regions like West Java—negotiate identity representation, discourse diversity, and the constitution of local public spheres within the SSJ system. Much of the existing scholarship focuses on national-level policy or aggregate compliance, leaving unanswered questions about how structuration processes shape which voices are amplified or marginalized in local broadcasting.

Situating this research within global debates on cultural imperialism and glocalization highlights that these are not uniquely Indonesian challenges, but part of a wider pattern of media centralization in which local content is often subordinated to commercial logics and centralized power structures. Addressing this gap is crucial for understanding not only the effectiveness of regulatory frameworks but also their impact on media pluralism, identity politics, and democratic communication.

Vincent Mosco (2004), as a key figure in the study of the political economy of media, conceptualizes three analytical practices—structuration, commodification, and spatialization—that together explain the relationship between media systems and broader political–economic structures. Structuration examines how media institutions are both shaped by and actively shape social, economic, and regulatory structures (Fuchs, 2024). This concept is particularly relevant in the Indonesian context, where the broadcasting system operates under the dual forces of post-reform democratization and market consolidation. In West Java, for example, the structuring of local content production and distribution reflects how regulatory frameworks such as the 10% local content mandate interact with ownership patterns, economic incentives, and organizational strategies. Media institutions make strategic choices about whether to produce content locally, outsource production to Jakarta, or repackage centrally produced segments—all of which are responses to the structural pressures embedded in the political economy of broadcasting.

Commodification helps explain why economic logics often override cultural or democratic objectives. Local content production is frequently seen as costly and commercially unattractive compared to nationally uniform programming. Large networks prioritize content that maximizes advertising revenue, which is concentrated in national markets, while local content with smaller audiences receives fewer resources (Juditha, 2015). This dynamic reinforces centralization, as producing programs in Jakarta is cheaper and more scalable than supporting multiple decentralized production units across regions with varying costs and infrastructure.

Finally, spatialization sheds light on how geographic and infrastructural inequalities shape media flows. The centralization of production in Jakarta marginalizes local voices by privileging narratives constructed in the capital, often overlooking the cultural diversity of regions like West Java (Maryani, Priyadharma, Janitra, & Rahmawan, 2020). This results in content that formally fulfills regulatory obligations but fails to reflect local perspectives substantively. Taken together, Mosco’s framework enables this study to move beyond administrative evaluations of the 10% quota and instead analyze the interplay between regulation, political–economic structures, and local media practices. This approach directly informs the research questions, which seek to understand how national regulations are negotiated and operationalized by regional broadcasters under unequal economic and infrastructural conditions.

This study seeks to address that gap by analyzing how broadcasting institutions in Jawa Barat negotiate regulatory requirements, economic pressures, and organizational structures in fulfilling the 10% local content mandate. By focusing on structuration within the political

economy of media, this research offers updated and region-specific insights into the persistent gap between policy and practice in Indonesia's broadcasting system—an area that remains underexplored yet crucial for understanding media diversity in the democratic era.

To guide this inquiry, the study is structured around the following research questions:

Q1: What are the efforts of networked broadcasting institutions in West Java to meet a minimum of 10% of local content?

Q2: How is the local content production process carried out in networked broadcasting media in West Java?

Q3: How do structuring patterns shape the production and distribution of local content in networked broadcasting institutions in West Java?

RESEARCH METHOD

This study employed a multiple-case study design to investigate the implementation of the 10% local content policy within networked broadcasting institutions in West Java. A case study approach was selected because it enables the examination of contemporary institutional phenomena within their real-life contexts, especially where the boundaries between context and phenomenon are blurred (Yin, 2008). A multiple-case design was appropriate as the research involved several regional bureaus of national networks—MNC Group, Trans Media Group, TV One, and Elshinta (Radio)—allowing for cross-case comparison and identification of both shared and divergent institutional patterns. The study adopts an issue-oriented focus, examining how different institutions interpret and operationalize the same regulatory obligation. West Java was deliberately chosen due to its status as the most populous province, its rich cultural diversity (notably Sundanese), its proximity to Jakarta's media centers, and the presence of numerous regional bureaus, making it a strategic site for analyzing tensions between centralization and local representation in broadcasting.

The unit of analysis comprises networked broadcasting institutions at the regional level, specifically their local bureaus or affiliates. Informants were selected through purposive sampling based on their strategic involvement in local content production. These included editorial and newsroom staff (editors and producers), managerial staff who allocate and schedule content, and regulatory actors from KPI Daerah Jawa Barat. This composition ensured coverage of both editorial and managerial perspectives, as well as regulatory oversight, enabling a comprehensive understanding of organizational decision-making, production workflows, and the policy environment surrounding local content.

Data were collected through in-depth interviews and participant observation in selected bureaus. Secondary data—including regulatory guidelines, KPI reports, and internal editorial policies—were used to contextualize findings. Data analysis employed the constant comparison method (Glaser, Strauss, & Strutzel, 1968) to identify themes and variations across cases. To enhance validity, triangulation was applied through multiple dimensions: methodological (interviews, observation, documents), data sources (different institutional roles), theoretical (political economy), and inter-researcher collaboration (Susanto & Jailani, 2023). This approach enabled a contextualized and analytically robust understanding of how regulatory, economic, and organizational forces structure local content production and distribution in West Java.

DISCUSSION

The findings of this study reveal that the practice of fulfilling the 10% local content requirement by networked broadcasting media in West Java is shaped by a combination of regulatory frameworks, economic considerations, and institutional structures. Using the political economy of media framework (Mosco, 2004), this phenomenon can be analyzed through three interrelated dimensions: structuration, commodification, and spatialization. These dimensions help explain why, despite the formal existence of regulations mandating local content, the substance and quality of local content production remain uneven and often symbolic.

First, through the lens of structuration, the study shows the reciprocal relationship between structural forces (regulation, ownership patterns, funding models) and the agency of media institutions (newsrooms, production teams, management) in shaping local content practices (Rusadi, 2015). Structuration explains how networked media in West Java do not simply follow regulations mechanically, but actively interpret, negotiate, and adapt to them based on their organizational capacities and strategic priorities. For example, although all networked television stations allocate 2.5 hours daily to local content as required, their production patterns differ significantly. Media with stronger economic and organizational capacities—such as SCTV and iNews—can exceed 15% of local content and invest in more substantial production at the regional level. In contrast, most other media produce their “local content” in Jakarta and merely repackage it for regional audiences, illustrating a form of adaptation that prioritizes economic rationality over authentic local representation.

Table 1. Average Local Broadcasts on Networked Television Broadcasting Institutions in West Java from May to September 2024

No	Broadcasting Institution	Average Daily Duration	Average Duration of Local Broadcasts in One Day	Average Percentage of Local Broadcasts in One Day
1	GTV	1440 minute	91.5	6.4
2	Indosiar	1440 minute	170.7	11.9
3	iNews	1440 minute	300.4	20.9
4	Metro TV	1440 minute	148.8	10.3
5	Kompas TV	1440 minute	153.5	10.7
6	MNC TV	1440 minute	144.9	10.1
7	RCTI	1440 minute	126.5	8.8
8	RTV	1440 minute	157.9	11.0
9	SCTV	1440 minute	200.3	13.9
10	Trans 7	1440 minute	162.5	11.3
11	Trans TV	1440 minute	148.9	10.3

Source: Data from the West Java KPID SSJ Monitoring Team report, May - September 2024 (Data Processed by Researchers, 2024)

This adaptation reflects how structures (e.g., centralized ownership, regulatory frameworks, and funding dependencies) shape institutional practices, but also how agents (media organizations) re-interpret those structures to fit their own operational logic. Radio Elshinta’s case shows a higher degree of local autonomy, emphasizing local engagement, while CNN West Java applies a structured coordination model with the center, and MNC West Java adopts a flexible collaboration between center and region. These variations highlight different structuring patterns that emerge from the interplay between national media systems and local institutional realities.

Second, from the perspective of commodification, local content is largely treated as a commercial product rather than as a vehicle for local cultural expression. The decision to centralize content production in Jakarta is driven primarily by cost-efficiency motives. Producing genuinely local content requires deploying crews, technical teams, and editorial

resources to various regions, which involves higher logistical costs—especially for regions outside major urban centers. By producing content centrally and broadcasting it uniformly, media companies achieve economies of scale, reducing costs while formally complying with regulations. However, this approach results in homogenized content that lacks local depth. As Wahid & Pratomo (2017) argue, the political economy of media prioritizes profitability, often at the expense of public service obligations.

The data from West Java indicate that among the national network television stations analyzed, only two exceed the 10% minimum threshold in a meaningful way: iNews, with approximately 20.9%, and SCTV, with around 13.9%. iNews's substantially higher figure is largely driven by the dominance of news programming in its schedule, which enables events and issues related to West Java to be consistently classified as local news content. SCTV's local content, meanwhile, is supported not only by regional news coverage but also by non-news programming, such as television films (FTV) set in West Java and feature programs that highlight aspects of local identity. In contrast, most other national network stations remain close to the minimum 10% requirement, often fulfilling it administratively by labeling centrally produced Jakarta-based content as "local," a practice that reflects a quantitative interpretation of regulatory compliance rather than a substantive commitment to representing diverse local voices.

Third, the dimension of spatialization—which refers to the spatial organization of production, distribution, and ownership—helps explain the structural imbalance between Jakarta (center) and West Java (periphery). The majority of local content production remains concentrated in Jakarta, where decision-making, editorial control, and resource allocation are centralized. Regional bureaus often function as peripheral extensions rather than autonomous producers. This center–periphery structure creates a dependency in which regional units have limited control over content and budgets. For example, MNC West Java and CNN West Java both rely on centrally controlled funding, with varying degrees of local flexibility, while Radio Elshinta relies more heavily on community engagement due to its smaller operational scale.

The table on average daily local broadcasts shows that iNews—part of a large network with a hybrid local-national model—devotes 55.3% of its programming to local content, indicating that strong resource support from the center can enable higher local content production. Meanwhile, stations such as GTV and RCTI remain below or just around the 10% mark, demonstrating the uneven capacity of networked media to fulfill regulatory obligations across space. This spatial concentration of resources reflects media centralization (Darmanto, 2020) and reinforces structural inequalities in the media system.

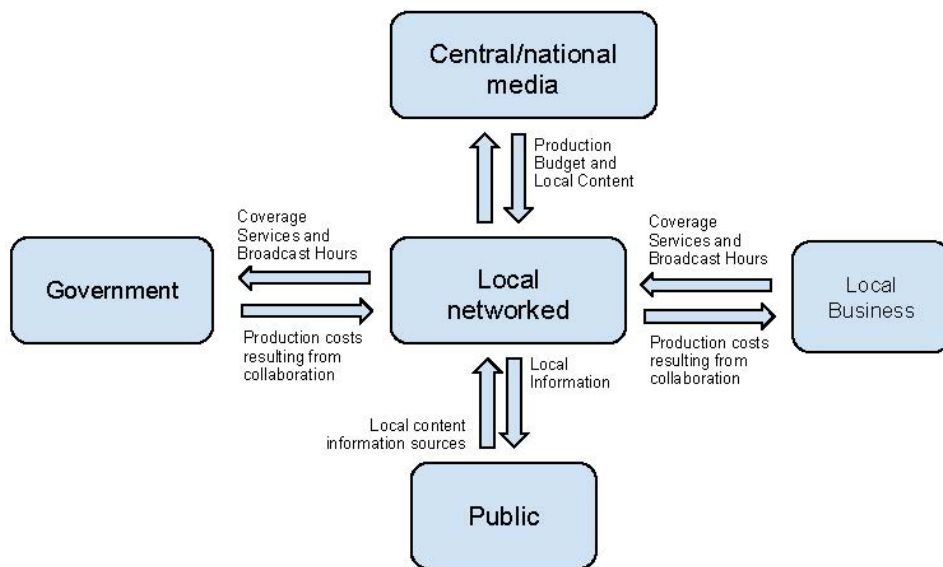


Figure 1. Chart of Local Content Production and Distribution Patterns in Local Networked Media

Source: Research Results, 2024

From the perspective of media regulation and power, the findings also highlight an asymmetrical power relationship between regulators (KPID) and large media conglomerates. KPID’s monitoring reports show that while regulatory mechanisms exist, enforcement remains weak, especially against major networks with strong political and economic influence (Prameswara, 2021). This imbalance aligns with Syukri, Sujoko, & Safitri (2019), who argue that in Indonesia’s post-reform media landscape, regulations often function more as symbolic instruments than as tools of structural change. Large media entities use their economic power to comply formally while retaining control over production and distribution practices that align with their commercial interests.

Additionally, the relationship between media and local governments plays a significant role in the political economy of local content. Local governments are not only sources of information but also major funders through paid coverage, making the media financially dependent on political institutions. This dependency, coupled with the limited contribution of local businesses through advertising, creates a funding structure that can compromise editorial independence (Setiawan, 2023). MNC West Java, for instance, relies heavily on government cooperation for revenue, while Radio Elshintar faces difficulties attracting local advertisers, and CNN West Java actively seeks collaborations with local stakeholders and

communities. These varied strategies reflect different attempts to navigate regulatory and economic constraints in local content production.

The quality dimension of local content reveals that meeting the 10% requirement does not guarantee meaningful representation of local cultures. Quantity, most media comply, but quality, much of the content fails to reflect local diversity substantively. This finding echoes Mosco's (2004) argument that economic structures shape not only the quantity but also the *nature* of media content. The focus on cost-saving and efficiency, combined with centralization and regulatory formalism, leads to content homogenization and symbolic compliance rather than genuine local empowerment.

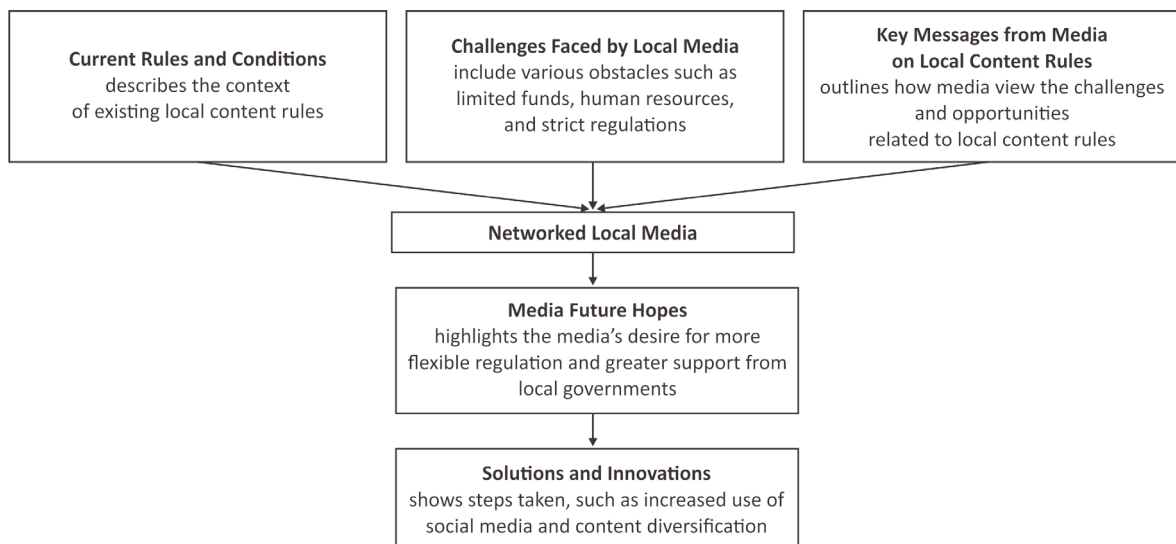


Figure 2. Chart of Regulatory Challenges and Adaptation of Technological Developments by Local Networked Media
Source: Research Results, 2024

The findings, derived from in-depth interviews with editorial, production, and managerial staff of several networked broadcasting institutions in West Java, reveal that most stations rely heavily on Jakarta-based production to meet the 10% local content requirement. Informants explained that program themes, scripts, and editing are determined centrally, while local bureaus contribute limited supporting materials such as short interviews or B-roll footage. This model is primarily driven by cost-efficiency and limited local resources—regional teams are small and lack full production facilities. As one editorial coordinator from a major network described, “We just send short clips or interviews; the center does the

editing and decides the structure.” This workflow enables formal compliance with regulations but reduces the authenticity and diversity of local representation.

Interview data also indicate that different media organizations adopt distinct strategies to manage local content production. Radio Elshinta Bandung emphasizes local autonomy by involving community actors, NGOs, and universities in producing talk shows and live cultural discussions. MNC West Java applies a hybrid approach, inserting locally gathered footage into centrally structured formats, while CNN West Java follows a strict top-down coordination model, with Jakarta controlling program formats and time slots. Informants highlighted various operational challenges, including mismatched technical standards, delays in turnaround time when sending content to Jakarta, and limited editorial freedom to pursue stories beyond government-funded events. These qualitative insights show how institutional strategies are shaped by both structural constraints and organizational capacities.

These interview-based findings clearly reflect Mosco’s three dimensions of the political economy of media. Spatialization appears in the centralization of production in Jakarta; commodification is seen in how local content is treated as a regulatory product rather than genuine cultural expression; and structuration emerges through varying patterns of negotiation between central control and local agency. Theoretically, these insights deepen our understanding of how regulation, ownership structures, and newsroom practices interact in regional broadcasting. Policymakers should complement quantitative quotas with qualitative assessments and capacity-building initiatives to support more autonomous regional production, ensuring that local content serves democratic and cultural functions rather than remaining a symbolic regulatory requirement.

Based on findings, the Indonesian Broadcasting Commission (KPI) and the Regional Indonesian Broadcasting Commissions (KPID) need to update the regulatory framework from a focus on quantitative monitoring toward an emphasis on the provenance (authentic origin) of content. A first concrete step is to mandate strict criteria regarding human resources and production infrastructure. Regulators should require that at least 60% of the core production team for Local Content programs (such as producers and scriptwriters) consist of verified local residents, while also ensuring editorial autonomy and clear budgetary authority for Heads of Regional Bureaus. In addition, KPI should formally distinguish between Original Local Content, fully produced using regional facilities and local human resources, and locally themed content produced at the central level, with only original local content counted in full toward quota fulfillment.

Beyond tightening definitions and human resource criteria, KPI/KPID must also address the root causes of economic inequality and resource centralization. This can be achieved by mandating separate and transparent regional production budgets explicitly allocated to regional bureaus to support high-quality local production. At the same time, regulators should introduce actionable policy incentives. For example, support mechanisms (such as recommendations for reductions in regional levies) could be provided to broadcasters that succeed in achieving a certain proportion of regional advertising revenue sourced from local Micro, Small, and Medium Enterprises (MSMEs), rather than relying solely on national advertisers. This approach would transform regulatory compliance into a catalyst for regional economic empowerment and ensure that Local Content not only fulfills legal obligations but also substantively reflects the cultural diversity and community interests of West Java.

CONCLUSION

The findings of this study have significant theoretical and policy implications for understanding the dynamics of local content production in Indonesia's networked media system. Theoretically, this research extends the application of Mosco's political economy framework by demonstrating how structuration, commodification, and spatialization intersect in a specific regional context (West Java), producing distinctive patterns of media practice that are often overlooked in national-level analyses. By foregrounding *structuring patterns* within regional broadcasting institutions, this study contributes to a more nuanced understanding of how regulatory frameworks are interpreted and enacted differently across media organizations with varying capacities and strategic orientations. From a policy perspective, the findings suggest the need for regulatory refinement and stronger enforcement mechanisms to prevent symbolic compliance with the 10% local content mandate. Regulators such as KPI must move beyond quantitative monitoring toward qualitative evaluation frameworks that assess the cultural and social value of local content. Furthermore, policy interventions should address structural inequalities between Jakarta and the regions through decentralized resource allocation, incentives for genuine local production, and capacity-building programs for regional media. Strengthening collaboration between regulators, local governments, and media organizations is crucial to ensuring that local content functions not merely as a regulatory checkbox, but as a meaningful medium for local cultural representation and democratic participation.

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