Television Performance in Indonesia 2006
Steering Between Politics, Civil Society, and Market

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Abstract

This article looks at the television landscape in Indonesia that has undergone a major transformation in recent decades. As one of the 'Asian Tigers' Indonesia introduced commercial television in two waves between 1989 and 2002 as a complement to the traditional State broadcaster TVRI that promoted national unity under Suharto's New Order regime. Commercial TV stations contributed tremendously to civil society in the period 1998-2000 by supporting the movement for democratic reform that led to the resignation of president Suharto. A performance assessment of the current Indonesian television scene shows that most commercial TV stations, after a short coalition with civil society, went 'back to business' again in the context of a relatively young but highly competitive Indonesian market.

Keywords: Indonesia, television, performance, mission, program policy, audience

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Introduction

Television in Indonesia has been going through constant changes ever since the first wave of five private stations was established between 1987 and 1995, in addition to the already existing State owned national radio and television. This first wave was followed after the May Revolution of 1998 by a second wave of five private stations between 2000 and 2002. In the same period the Broadcasting Act of 1996/1997 was abolished and finally replaced by the more 'reform inspired' Broadcasting Act of 2002, which included the establishment in 2003 of an independent regulatory body, KPI or Indonesian Broadcasting Commission. The latter, representing the public interest, was meant to negotiate among other things licensing issues between the Government and broadcasting organizations, so that the media can fulfil their responsibility towards civil society in Indonesia.

After the elections of 2004, a situation emerged whereby ten commercial television stations are in fierce competition for market shares and advertising revenues, while at the same time trying to fulfil their responsibilities towards Indonesian civil society, in a context wherein ground rules for negotiating regulations concerning the licensing of national and community television stations throughout Indonesia are not yet clearly established.

This paper presents an analysis of the overall performance of the Indonesian television scene (both public and commercial stations) anno 2006, providing a historical analysis based on literature review and desk research, an extensive performance assessment based on expert interviews with senior management in five television stations as well as a comparative evaluation of the development of Indonesian television over time between the driving forces of politics, market and civil society.

Setting the scene

National television was implemented in Indonesia in 1962. The expansion of television in Indonesia coincided with the establishment of Suharto's presidency in 1966. TVRI, the State radio and television broadcasting organisation came under guidance of the Ministry of Information with the objective – as in most developing countries – to contribute to unity of the nation and to its development.

Under Suharto's New Order regime, economic growth became the first priority and TVRI benefited from this development by establishing more regional stations in the archipelago and by the launch of the *Palapa A* satellite in 1976 and the (stronger) *Palapa B* satellite in 1983. The technical expansion of production and reception facilities to the provinces created an opportunity for more cultural and ethnic diversity in programming, without lessening the centralized control of television from the capital Jakarta. Through a variety of mechanisms, ideological *Pancasila* courses for editors-in-chief, licensing regulations and a culture of telephone calls to editors, the Government maintained the so-called 'SARA doctrine'. This doctrine implied the prohibition of any mentioning in the media of 'sensitive issues' such as 'ethnicity', 'religion', 'race' and 'social class' (*Suku, Agama, Ras, Antargolongan*) (d'Haenens, Verelst & Gazali, 2000: 201).

The launch of commercial television

The Open Market policy which had led to a strong economic growth in Indonesia between 1980 and 1997 was in 1986 expanded by the Government to the Open Sky policy, allowing for the distribution of television channels via satellite dishes and cable networks. This *de facto* led to the introduction of commercial television, initially through a pay-television cable service in Jakarta and Surabaya.

The reasons of the Government for not blocking these initiatives were at that time manifold. First of all, the use of satellite technology had prompted a vast growth of sales of television sets throughout the archipelago creating a consumer market; secondly, business was booming and media and industries were clamouring for more advertising space, especially on television, since the ban on advertising on TVRI from 1981 and, last but not least, various indigenous businessmen were very interested in developing this new market for commercial television, if only to prevent foreign investors such as transnational television companies from entering the market (Sen & Hill, 2000: 114).

As a result, between 1989 and 1995, the 'first wave' of five commercial television stations was established in Indonesia. These stations were RCTI (1987), SCTV (1989), TPI (1990), ANTV (1993) and Indosiar (1995). According to the Guidelines for Commercial Television, issued in 1990, these commercial stations were to support the Constitution and *Pancasila*, to support national development and to comply with the SARA doctrine. Part of the advertising revenues were to be contributed to TVRI and broadcasting of new programs other than TVRI news was not allowed. Stations were allowed to transmit via satellite, freeing them from the restriction of cable networks.

The so-called deregulation policy of the early 1990s meant that licenses were issued to businessmen close to the Suharto circle. The licensing process was not transparent, news production was not allowed; and the Government kept a close eye on editorial policies via the 'telephone culture', the SARA doctrine and appointments of key figures. What was established was 'commercialization without independence' (Chan & Ma, 1996: 49), in an attempt to ward off pressures from transnational television and western influences by the rapid development of domestic commercial television.

Between the late 1980's until mid-1997 Asian economies experienced tremendous growth. Indonesia became one of the 'Asian Tigers'. In this economic climate, the five recently launched commercial television stations competed heavily for a share of a growing audience and an expanding advertising market. The number of television sets rapidly increased from 7.6 million in 1990 to about 20 million television sets in 1997, for a population of over 200 million (d'Haenens, Verelst & Gazali, 2000: 202). In a very short time, commercial television became a booming business in Indonesia. Although formally forbidden to produce news, commercial television stations with a combination of 'soft news', sitcoms and drama series drew away audiences from the State-owned TVRI. This shifted the focus of news from TVRI to the commercial stations. Meanwhile, the system of pre-censorship as executed by the Ministry of Information gradually broke down, if only because of the increasing amount of television output that needed pre-censoring (Kitley, 2000: 122).

Since the one broadcasting act in force concerned TVRI only, commercial stations were strictly operating in a legally grey area. This necessitated a new legal framework for both State and private television. The new Broadcasting Act of 1996 came into existence after long discussions in and outside parliament concerning issues of ownership, regulations on sex and violence, and (the lack of) educational and children's programs (Kitley, 2000: 297-312). Eventually, the Broadcasting Act was approved by the President in 1997, establishing a legal basis for commercial television and for the first time allowing commercial television to

produce its own news. It is interesting to notice that the period of rapid expansion of commercial television coincided with a gradual 'opening up' (*Keterbukaan*) of public discussion in Indonesian society and the development of a movement for 'civil society'.

Between 1989 and the economic crash of 1997, Indonesia was in the middle of, what could be called, a pre-transition phase, characterized by increasing pressure from society for democratic reforms and by conflicting interests within the ruling elite (Kitley, 2003: 105). In this climate of more openness and political discussion, news and especially television news was much in demand, which put commercial television in a difficult position. On the one hand, television was still much under control by the Government, but on the other, television news became an important weapon in the increasing competition for audience shares and advertising revenues. It was therefore inevitable that commercial television stations would become involved in the *Reformasi* movement, following the 1997 Asian economic crisis and the collapse of Suharto's New Order regime in 1998.

Television in the *Reformasi* period

The Asian economic crisis of 1997 and the fall of the Rupiah affected almost all Indonesian businesses. The economic crisis turned political when it became clear that president Suharto was determined to run for another term. With the help of his allies he was re-elected president in March 1998. This led to an escalation of protests. On May 12, 13 and 15 a couple of 'incidents' took place which shook the nation. On May 12, four students from Trisakti University were killed during a peaceful anti-Government demonstration, followed by three days of ferocious rioting in six major cities, including Jakarta. In the wake of these 'incidents', people took massively to the streets and demanded Suharto's resignation. On May 21 1998, he was forced to resign.

Unlike television, underground media, Internet, alternative media, rumours and especially local radio stations, followed by the newspapers, were very much in the forefront of gathering and distributing information about what was going on, even before Suharto's step down (Gazali, 2004: 86-87). TVRI did not report on protest actions until the riots of May 14, and in the commercial television newsrooms tensions arose between owners, loyal to the Suharto clan and journalists who felt it their responsibility to report on what was happening in society. From early 1998 on, the commercial stations did report in a neutral way on the protest actions, but they fully joined *Reformasi* after Suharto's resignation (Vilé, 2005: 64-66). The turning point was a famous incident on May 17, 1998 in the newsroom of SCTV, whereby a former cabinet minister and opposition figure, during a live interview, broke the pre-arranged agreement and declared openly that "this country needs to be reported upon" (Vilé, 2005: 65). At that time interest in news was so vast that television news ratings were equal to those of popular entertainment. Reporting and news broadcasts became an instrument in the competition between television stations (d'Haenens, Gazali & Verelst, 1999: 148).

The switch by the commercial television stations from Government orientation to an orientation on the information needs of society gave an enormous boost to the Reform movement and strengthened the television stations' credibility. The Government lost control of the news flow as the commercial stations invested in news reporting and news formats, while TVRI lost its audiences to the commercial stations.

After Suharto's resignation, several developments further improved the Indonesian media situation in terms of openness and transparency. The Department of Information was liquidated, licenses for new commercial media were issued (Kitley, 2003: 108). These major deregulations did change the Indonesian media landscape dramatically. Over 1,200 new printing licenses were issued, together with more than 900 new commercial radio licenses and between the years 2000 and 2002 five newcomers entered the commercial television market.

These stations were Metro TV, TransTV, Global TV, TV 7 and Lativi, bringing the total up to ten commercial television stations. At the same time, a rapidly growing number of commercial television stations were already discovering the pressures of developing a professional news department in a very short time, in a market increasingly competing for both qualified media personnel, news and entertainment formats, audience shares and advertising revenues.

The Broadcasting Act of 2002

In the same period the Broadcasting Act of 1996/1997 was abolished and finally replaced by the more 'reform inspired' Broadcasting Act of 2002, which included the establishment in 2003 of an independent regulatory body, KPI or Indonesian Broadcasting Commission.

The Broadcasting Act of 2002 was very much a product of the Reform movement, stressing decentralization of media (in line with regional autonomy and decentralization policies) and emphasizing 'democratization', meaning transparency and accountability in licensing procedures for public service and commercial broadcasting licenses. Never before in the history of Indonesia had so many professional and academic institutions, NGO's, politicians and intellectuals been offered an opportunity to be actively involved in discussions about the future of broadcasting (d'Haenens, Gazali, Verelst, 1999: 149). The Broadcasting Act included the establishment in 2003 of an independent regulatory body, KPI or Indonesian Broadcasting Commission. The Broadcasting Act does reflect very much the ideology of Reformasi (decentralisation) but is in the eyes of the commercial television stations not compatible with their business model of commercial television in an increasingly competitive national tv market. The law grants national coverage only to TVRI but for commercial tv stations to establish national coverage, they are obliged to set up a cooperation with initiatives in the regions. This matter has led to fierce discussions and has still not been adequately resolved.

In 2004 the Constitutional Court ruled that the Broadcasting Act was in line with the Constitution and that the Indonesian Broadcasting Commission should sit together with the Government and come to an agreement on licensing issues. It also stipulated that additional, more specific regulations should be designed by one party only, i.e. the Government (our interview with KPI member, September 30, 2006). This decision placed the Government very much back at the center of control over broadcasting issues, even leading to the *de facto* resurrection of the Ministry of Communication and Information Technology. On several occasions the KPI invited in vain the responsible Minister 'to discuss together' relevant issues. Meanwhile, in 2006, all ten commercial television stations received Government confirmation stating that they will automatically get their national coverage license (our interview with KPI member, September 30, 2006). As this practice is a breach of the Broadcasting Act, the KPI brought these matters in to the Constitutional Court, requesting that it be given regulatory authority over the sector, but without result so far. The whole development was described to us by one of the KPI members as the betrayal of the spirit of the Broadcasting Act, by commercial television broadcasters and the Government, and by negligence of the Parliament.

Nowadays, the situation seems, shortly before the national elections of 2008, that both commercial television stations and the Government have found each other in an attempt to effectively frustrate the operations of the KPI and the spirit of the Broadcasting Act. As a result, there is presently no transparency and therefore no progress whatsoever on the licensing of (local and regional) broadcasting initiatives as an alternative to the commercial merger game currently going on. At the moment *de facto* the Government does and can issue

licences, but depending on the ruling of the Constitutional Court, these regulations may or may not be valid.

Monitoring broadcast performance: scope, method, and evidence

This article reports on our interviews carried out from 22 till 30 September 2006 with television program and policy makers in five Jakarta-based television stations, both public and private (i.e. TVRI, RCTI, SCTV, Trans TV, Metro TV). For this research, apart from the site visits, we could build on earlier research reported in 1999 (d'Haenens, Gazali & Verelst, 1999), updated in 2000 (d'Haenens, Gazali & Verelst, 2000) and 2004 (Gazali, 2004) as well as policy material such as annual reports and articles published in the Indonesian media as secondary evidence.

Our method of monitoring the performance of television stations in particular and of media policy in more general terms is adopted from the present Dutch practice, which periodically assesses public broadcasting performance. The Dutch Media Act obliges Dutch Public Broadcasting to organize an evaluation of the public broadcasters' performance every five years. To this end, an external assessment commission ('visitation commission') was installed consisting of independent experts (Bardoel, 2008, 2003). In light of the Dutch decentralized system, the Commission must report on the performance of both national public broadcasting as a whole and of the separate broadcasting organizations in particular. It must also assess to what extent the programs offered meet the 'interests and insights' of the general public and of minorities in Dutch society. This periodical assessment procedure is meant to strengthen the legitimacy of public broadcasting and to improve the quality of internal managerial and program production processes. In an effort to make the monitoring process both comprehensive and comparative among television stations, Dutch public broadcasting designed a detailed 'assessment framework' touching upon the most relevant aspects of broadcasters performance, relating to the following perspectives (see Appendix 1):

- (1) program: i.e. mission and identity, performance, cooperation;
- (2) audience: i.e. reach, segmentation, distinctiveness, accountability;
- (3) organization: i.e. organizational structure and culture, financial transparency and efficiency, innovation.

More in particular, this study looks at the stations' *mission*: its formulated aims in both quantitative and qualitative terms, its position in the television and greater media landscape, and its contribution to civil society. Furthermore *program* policies, a station's program mix in quantitative and qualitative terms, the degree of diversity in the program supply, the distance from Government and market, and the level of in-house production are looked into. *Audience* profiles in both quantitative and qualitative terms are looked into as well as aims realized and instruments for public accountability put in place. Finally, the broadcasting *institution* and its contribution to the realization of mission and aims, its efficiency and transparency, the level of professionalization of its staff are taken into account as well as the level of innovation and training made possible.

Performance assessment of the current Indonesian broadcast scene

This section looks into the endeavours of five Indonesian broadcasters (both public and commercial) pertaining to their search for quality and performance criteria in a young but highly competitive Indonesian market. Our analysis of their quest for performance and quality criteria considers policy measures assigned by the Government as enshrined in media legislation, and assesses self-determined policy by the broadcasters as exemplified in concrete

program output and audience reactions. AGB Nielsen Research (2007) maps the positions of the main national players in the Indonesian television landscape, illustrated with their respective market shares. While newspapers reach a mere 28 percent of the people and magazines even less (19%), television is omnipresent with a reach of 85 percent in urban areas and 65 percent in the rural areas (Clarity Research, 2007). TVRI (*Televisi Republik Indonesia*), although covering most of Indonesia's territory, lost most of its audience to commercial counterparts. Market leader is RCTI (*Rajawali Citra Televisi Indonesia*), followed by SCTV (*Surya Citra Televisi*) and Indosiar (*Indosiar Visual Mandiri*). Two more television stations, TPI (*Cinta Televisi Pendidikan Indonesia*) and Trans TV (*Televisi Transformasi Indonesia*), account for a market share above ten per cent. The remaining television channels are smaller players in terms of market prominence.

In an effort to join forces, Indonesian broadcasters got quite involved recently in the merger game: Global TV and TPI merged with RCTI in the MNC/*Bimantara Citra* group, TV7 merged with Trans TV in TransCorp, and Anteve (*Cakrawala Andalas Televisi Indonesia*) and Lativi (*Lativi Media Karva*) joined forces in the STAR group. Indosiar is currently negotiating with both TransCorp and the MNC/*Bimantara Citra* group (see Table 1).

Table 1 about here

Broadcasters' mission statements

Our desk research revealed that the broadcasters' mission statements are not formulated in operational, let alone in quantitative terms. Using well-sounding concepts, they are kept deliberately vague and sound to a large extent as echoes of the *Pancasila* pillars, with nation building and unity orientation as the key elements, parallel to the aim of developing the country. Commercial stations tend to go along with this phraseology. Given this vagueness, one may wonder what contribution to civil society each of the different television actors actually are making, and to what different degrees. TVRI continues to fulfil the role of the State television in that it aims to tie together the association and unity of the nation: as such it wants to reach every Indonesian citizen, promoting local cultures, including in the remotest areas.

Of the commercial stations, RCTI's goal is to set the benchmarks for the industry, framing its programs for the upper class. Ideology is not a driving force here. Metro does aim at promoting the nation's and country's advancement, trying to work towards a so-called democratic ambience (it is the only station using the term in its mission). Moreover, it wants to excel in global competition, profiling itself as a pan-ASEAN station which can be received throughout the Indonesian archipelago and, among others, all the ASEAN countries through the *Palapa* satellite. Trans TV equally wants to operate in the ASEAN sphere, functioning as a vehicle for ideas and society aspirations in order to educate and contribute to the improvement of wealth of the nation, strengthening the unity and intensifying democratic values. But the reality is that here too the market logic comes first, ideology following. SCTV's aspirations of establishing a professional benchmark should be interpreted more in technical terms (i.e. best picture quality, best sound) rather than in journalistic terms. Noteworthy are its widely viewed information and current affairs programs. In short, mission statements are formulated in either national, nation-binding terms, reaching all citizens (TVRI), aiming at consensus building and conflict avoidance, reaching out to all ASEAN citizens, targeting middle and high class segments. Hence, their missions are operationally formulated in marketing terms.

Our interviews with the stations' policy makers made it clear, among other things, that the impact of market forces depends considerably on structural conditions such as program type related costs and audience demands. The kind of broadcast organizations that compete with one another on the Indonesian broadcasting scene are assessed. As shown with its low market share (Table 1), the former monopolist and State broadcaster TVRI clearly does not produce a program supply that adequately meets current audience demands. Hence, on the one hand some competition from newcomers may have a beneficial effect on audience satisfaction. On the other, harsh competition may have an impact that is as detrimental as that of a monopoly (e.g., McQuail & Van Cuilenburg, 1983). Particularly the degree of current diversity or heterogeneity of program genres and audiences targeted is looked at into in further detail.

Broadcasters needing to rely on advertising as a source of income obviously aim for the largest possible audience groups: this is an economic reality one cannot ignore (Owen & Wildman, 1992). Another reality is that viewers tend to distribute themselves relatively equally across channels providing the same programs (Van der Wurff, 2004). Single-channel broadcasters prefer to run as little risk as possible and therefore provide slightly different variants of the same mainstream program, until the main audience is divided across so many channels that serving a niche audience with a minority program becomes a more lucrative option. Competition between increasing numbers of channels will first result in program duplication and later on in some diversity. Consequently, applied to the Indonesian context, broadcasters offer a mix of similar mainstream programs, while some offer different minority programs. Niche channels such as Metro TV are both more distinctive in their program genre decisions and less internally diverse. Changes in channel numbers not only contribute to channel differentiation and increase in market diversity but also reduce audience numbers and advertising revenues per channel. When this decline becomes sufficiently important, broadcasters are forced to cut costs by reducing expensive programs, and airing cheaper programs (game and talk shows, quizzes, foreign programs and re-runs) more frequently. These arguments indicate that some competition on television markets contributes to diversity, whereas more intense competition may reduce diversity. This evidence was empirically grounded on the Dutch broadcast media by Van der Wurff (2004) and it seems that this level of harsh competition is reached nowadays in the Indonesian broadcast scene.

In all, what the recent developments as of the 1990s in the Indonesian broadcast scene have clearly shown is that here, like in many other places throughout the world, the market logic has become an increasingly dominant force in the program policies followed. One first concern that comes to mind in this respect is whether broadcast supply matching audience demands is also able to meet other societal standards measuring media performance.

Program policy

Let us now look into the actual program genres on offer on the different channels, providing an overview of the program supply decisions taken and the variations herein, depending on the market conditions they are evolving in. We observe that the former State broadcaster and monopolist *TVRI* currently still dedicates 60 per cent of its broadcast time to news, complemented with other programs related to both education and entertainment. But the latter program category departs from a distinctive kind of philosophy as the entertainment here is very different from that of the commercial channels. A very strong development ideology is omnipresent as well as a strong willingness to distinguish itself from the commercial channels. Thanks to news exchange possibilities negotiated since long, news production is aimed to become more crucial. Nevertheless, the program budget remains under severe pressure. Worth noting is that this station caters for traditional audiences in the regions,

including the elderly. Whether the younger audiences will also get on board still remains to be seen. So far the station's attempts were not successful. These noble intentions are in sharp contrast with the Nielsen ratings, showing an interest only in the more affluent, urban populations in the nine main cities. While TVRI is present everywhere thanks to relay stations, its market share in Jakarta has difficulty reaching a mere 1%.

Our informants in TVRI claimed to have acquired gradually, i.e. as of the May Revolution 1998, a degree of independence from the Government. An indicator of which is that nowadays everything can be reported upon. According to our informants, distance from any political party is observed, including the ruling Golkar party, at least that is the intention. The big problem is the need for financial resources and fresh, young creative talent with the necessary professional background. This contrasts strikingly with the current reality of older employees taken over from different Governmental bodies, such as the former ministry of information, lacking every particular drive and professionalism. In all, we got the impression that this discourse was partly legitimatory.

RCTI's core business, as first kid on the block run by advertising and private capital, is drama aired in prime time, including mystery series, soft porn and violence as welcome complements to the serious and ideological profile of TVRI. In terms of variety Indonesian made and foreign productions dominate the schedule with up to 60-70% of the broadcast time. Twenty percent of the programs are made in-house, mainly comedy series, variety shows, music and talk shows. Five percent goes to news production. RCTI is a typically mainstream commercial channel, attracting both upper and lower economic and social capital groups. Indonesian *Idols* is part of the station's program mix, although adapted to the local taste. *Sidul* was an ideal example of a sitcom accepted by the general public, at both upper and lower ends: a balance exercise of idealism in itself, it reached the targets set while aiming at generating as much revenue as possible. RCTI started out as a trendsetter and wants to keep this standard high. The word OKE in the station's slogan refers to the mantra of "anything acceptable is possible". This means that the channel packages stories in sitcoms provided these are acceptable for everyone. The Indonesian *Telenovela*, feel good television, is a main component in their branding. RCTI equally insists on airing religious programs like *Hikmah Fajar* (a talk show discussing Islamic values) which purpose it is to 'enlighten' the audience, although *de facto* low ratings are reached. In prime time the station aims at a big market, outside of these time slots, there remains time for idealism and religion, so it seems. As soon as it was legally allowed, the daily news bulletin (*Seputar Indonesia*), the most popular newscast, became one of the most visible components in the station's media mix. A strict policy related to purchasing drama is followed: Asian drama from Thailand or Korea is popular and considered suited for Indonesian audiences as well as the latin telenovela. The idea is that these gentle Cinderella stories appear to be more appealing for Indonesian audiences than the western soap series. That the station runs away from risks and controversies is illustrated in abrupt decisions taken with regard to programs such as *Joe Millionaire*, *Bantal* (a reality show) and *Kisah Mistery* (a ghost story) that irrespective of high ratings were abandoned because of a perceived mismatch with the image of the station.

In the eyes of the public, *SCTV* is the first station which profiled itself at a clear distance from the Government. At a crucial moment in Indonesia's recent history, this broadcaster set the standards, distinguishing right from wrong, reaching the people as citizens. Here we refer to the famous interview during the May revolution in 1998 with a minister who openly confessed about what was really going on. SCTV continues to believe it is its main task to inform citizens about what is going on in Indonesian politics. It is the only station with a kids reporter (*Krucil* is the name of the program) and airs a lot of soaps aimed at teens as well as the number one newscast. As a token of appreciation of the general public of the station's overall quality, SCTV won the Indonesian Customer Satisfaction Award for its

newscasts four times in a row. It also won the Panasonic Award three times for its levels of professionalism and technicality. It is the only Indonesian broadcaster to have obtained an ISO certificate.

Trans TV's program broad mix, comparable to that of RCTI, is very much built around the availability of certain age groups during specific time slots. In terms of news, the station airs *Reportase* three times a day in which soft news and hybrid infotainment are emphasized upon rather than hard news and political criticism. The telephone culture belongs to the past as some distance is maintained from the Government and political parties. As to entertainment, Trans TV caters for the affluent AB-groups (in Nielsen's terminology). Programs may be a little riskier than those of its competitors (e.g., one program has a transvestite presenter), but no risks are taken in political terms. Risks regarding lifestyles are acceptable, however. The recent merger with TV7 brought in, thanks to the links of the latter with KOMPAS media group, a lot of journalistic professionalism.

As to our fifth television actor under study, *Metro TV* is a niche station airing 60 percent news and 40 percent quality entertainment during the week; during week-ends this distribution is reversed. News is formulated here as a very broad program category including news bulletins, celebrity news, sports, crime news, business & finance news, editorials, live events, breaking news, newsflashes, talk shows such as *Kick Andy* and *Newsdotcom*. This is a typical strategy of a latecomer, characterized by a relative independence from the Government: no political pressures, no telephone culture. The (relative) independence from the market is apparent as the station does not depend on ratings but on reach figures. We also observed that in terms of program ethics, a difference between news and advertorials is well defined and respected, as neutrality in the news is considered a key factor in the broadcaster's survival strategy. Nevertheless, Surya Paloh, the owner, is a prominent Golkar political figure who several times in the past misused his position by allowing more broadcast time for his favourite political figures and issues in periods of election. By doing this, he contaminated the objective presentation of the news and its ideal mission.

In markets with sharp competition it is considered risky and irrational to launch distinctive products. The only rational thing to do is to try to differ as little as possible from the competition. Indonesia's current television business is a striking example of this economic principle. Three commercial broadcasters are in direct competition with one another (RCTI, SCTV and Trans TV), aiming at mainstream content. Trans TV and Metro TV clearly aim for the most affluent segments. Gradual differences per program type can be identified: SCTV is somewhat aiming at the younger, more modern audience groups, talk shows being the most prominent format. Sitcoms and drama are also central in the schedules but considerably higher in terms of cost structures, not in the least because of the local star cult with higher payments for star actors than for the other overall low-paid personnel. No important income can be generated from export possibilities and co-operation with the other neighbouring countries, one of the obstacles being diverging taste cultures. Metro is by far most successful in this area, selling off breaking news items (i.e. disasters) to foreign broadcasters. The most recurrent current affairs program format is the socially tinged report keeping away from the politically critical (especially the case of Trans TV); we observe the satirical and ironical programs as a new phenomenon for Indonesia. A whole lot of programs experience friction with Islamic values: up to this day the SARA doctrine still makes racial, religious, ethnic issues highly sensitive. Although the telephone culture has disappeared, there are still plenty of sensitive issues. Dealing with this, the soft approach has replaced the hard line: tackling of issues is adapted to the taste of a Muslim audience. Nation-building is still considered one of the broadcasters' tasks.

In all, when it comes to levels of diversity in terms of program supply and audiences targeted, the Indonesian broadcast scene is very different from the European practice which cherishes the pluralistic ideal. First, diversity relates to format and issues as well as to functions fulfilled by the media (information, education, entertainment): in Indonesia, apart from the public broadcaster TVRI and the niche station Metro TV, all stations fulfil all functions, with an emphasis on the entertainment function. A second distinction has to do with access to different viewpoints: the media should offer the complete range of opinions held in a society. In Indonesia, although it is said that some distance is acquired from the Government and the telephone culture is no longer common practice since Suharto's toppling, controversy and high-risk content continue to be avoided. Moreover, the television channel owners may intervene regularly and abruptly when market figures are disappointing or to support their candidate in election periods. Thirdly, there is the diversity in terms of persons and groups aimed at, with the underlying assumption that the media are supposed to serve the interests of all constituent groups in society by assuring adequate access to and representation of all those groups on the screen. A fair representation means that the media give voice to the people, and not only to the middle classes. In the case of Indonesia, it is the coming middle class that is catered for in the first place by all private broadcasters (to a far lesser extent by TVRI). A fourth type of diversity takes into account geographical coverage and relevance in the supply of local, regional, national and international media contents (see McQuail, 1992). But here also, the decentralization philosophy, although certainly a laudable political ideology, is considered an unrealistic and unattractive prospect for the commercial broadcasters in the current situation where the bulk of the middle and upper classes reside in Jakarta and other main cities. In reality mostly urban audience groups and more in particular Jakartans are targeted in the first place by all of the commercial players.

Audiences targeted, feedback, and research

TVRI's unique selling point is infrastructural: its 23 relay stations across the archipelago. Nevertheless, Jakarta suffers from bad reception quality because of the positioning of the antennas; removal to other parts of the city is planned. TVRI is looking for ways to attract younger audiences. The station also wants to promote local cultures. Here the audience is defined as citizens who need education, information, and development. As mentioned earlier, TVRI lost its monopoly over newscasts after the first commercial wave. Nielsen continuous audience figures (TVRI reaches a market share of around 1 percent) are not perceived as reliable but it is acknowledged that no workable and affordable alternative is in place so far. Qualitative feedback from letters and SMS messages are taken into account. There is no annual report as an accountability mechanism, although a yearly financial report is accessible by anyone interested. A website is available on which the station's mission and objectives can be found. Needless to say that TVRI has enormous potential, but so far failed to materialize it.

RCTI repackages its program content, including *Dangdut* shows originally meant for the lower classes, for the more affluent groups. In an effort to get to know its audience groups, RCTI consults the Nielsen continuous data (collected in nine cities). Only incidentally, when a real problem of audience non-response occurs, complementary *ad hoc* surveys, focus groups, telephone surveys are carried out to assess the taste cultures of different audience groups. Nielsen remains the continuous audience measurement reference from which policy decisions are drawn. Programs are continuously modified and adapted to the needs and expectations of the audiences. All audience profiles according to time slots are carefully identified. Appreciation is measured and is what interests the RCTI people next to the continuous audience measurement. On this basis and the competitors' program schedules, strategies are built.

SCTV targets at middle income and upscale families and their members in the age brackets ranging from 5 to 32 year old. The broadcaster heavily criticizes Nielsen. *SCTV* and *RCTI* are both winners in Jakarta while *Indosiar* is the winner outside Jakarta. *SCTV* and *RCTI* are working together at an alternative for Nielsen with the *Universitas Indonesia*. In Nielsen's terminology, *SCTV* attracts the upper to the middle BCD-audience groups. *SCTV* can rely on a research department of 22 people processing audience feedback; here research should be looked at broadly, as it consists of planning, scheduling as well. Pre-tests of programs are not carried out. There is an annual report that can be downloaded online; the company is rated on the stock exchange and therefore an annual report is compulsory.

Trans TV attracts the AB segment, or the upper economic class. The station is as dependent as anybody else on Nielsen. In addition, five to six employees are hired to establish the link with the audience in terms of reacting to letters, phone calls, SMS messages, etc. This evidence is then eventually used in order to remedy current programs: e.g., during Ramadan or as a reaction to complaints from the audience on pornography and violence program adaptations are carried out.

Metro TV equally targets adult middle income to elite affluent consumers living in urban centers. Audience peaks were reached when breaking news like the Tsunami in Aceh and the earthquake in Yogyakarta occurred. An alternative to Nielsen research is set up in collaboration with a local research company. Focus group discussions are conducted in order to know more about lifestyles. They do not sell airtime based on ratings but on reach figures. Feedback from the audience by letter or by short messaging system (SMS) is taken care of. An annual report can be downloaded from the website.

The availability of certain audience groups at certain times in the day appear to be the main organizing principle of the program schedule. No program strategy is consistently followed other than constantly looking at what the competition is doing and aiming at complementarity. Program schedules are adapted week after week, rather than planning for the longer run. On Wednesdays the Nielsen audience shares and reach figures are examined closely, upon which a defensive strategy is set up. This is typical practice in a highly competitive context with ten competitors fighting for the attention of largely the same audience groups. This situation will change when only three big multi-channel groups remain, as a result of which a higher level of efficiency strategy will be put in place.

In a scenario of three big multi-channel groups, a better strategy as to which audience groups to cater for (the upper class AB, the middle classes BC, D as the relatively neglected category) should be the result. The latter category can never become the primary market for commercial stations. Here *TVRI* should come in, make a difference, and materialize its discourse to service the people as citizens. Now it is basically rhetoric only. All broadcasters share a great deal of dissatisfaction with the Nielsen audience measurement system: Nielsen survey data only cover nine cities, which obviously brings about a very biased picture. When it comes to taking up public responsibility, we observe that people's complaints are taken seriously, yearly reports are made public if broadcasting companies are quoted on the stock market. In each station staff is available whose job it is to respond to telephone calls, email or SMS messages.

Away from the former authoritarian link between politics and the media, the current situation is an enormous step forward realized by the commercial stations primarily. One good example is the change in the newscasts over the last ten years: at first a monopoly of the State television, then it was reformatted by the commercial channels as news commentary and debate. The press (newspapers and magazines) always had and kept their critical potential, fulfilling expression and watchdog functions, not television. Meanwhile, the relationship between public and commercial interests has become ever more complex; so far, the market was divided among mostly Indonesian owners with only limited foreign ownership.

Nowadays, the plutocracy is scrutinizing the media's relationship with the political class. As the market is consolidating, time is getting right for really independent television. As broadcast groups become more powerful and can no longer be neglected, politics will become more media dependent as a result of which improved editorial independence will most probably emerge.

Decentralization, as opposed to Jakarta-based initiatives, with one commercial channel in each province as a goal, seems to be an idle political wish from the intellectual class. This decentralized model is not an acceptable business model for the commercial channels as it would lead to mere disintegration.

Broadcasters as institutions

Since the organizational dimension could not be discussed as intensively as the other aspects during the site visits and the necessary information was not always available or classified, we have chosen to report on the institutional aspect not on a company level but on a more aggregate level (i.e. commercial versus State/public television).

Commercial television in Indonesia is still a recent phenomenon, which also illustrated on the organizational level: commercial TV stations are generally very young organizations, both in view of the average age of its staff as in their overall management approach. Contrary to our expectations, most commercial stations have a large staff, ranging between approximately 1,300 (SCTV) to 2,000 employees (TransTV). These large numbers have to do with the low salaries in Indonesia, which may equally diminish the drive for outsourcing, which is predominant in (commercial) TV stations in western countries. At the same time most organizations adopt elaborate bonus systems: if an employee performs well, he or – quite often – she can earn up to five or six (RCTI) or even ten times (TransTV) the basic salary. Many organizations prefer to hire 'fresh' and energetic university graduates, not necessary with a communication background, who are provided an in-house training. Most organizations work with probation periods, ranging from three months (RCTI) to two years (Metro). Only few institutions hire professionally trained journalists or people with a past career in the press. Professional skills are considered important, but much less so the critical attitude that often comes with it. Since media companies have an excellent public profile, they are considered very attractive as employers and have no problem to hire new people. Some companies have a retention policy (Metro) in order to prevent their – often in-house trained – employees to move to other stations. There seems to be a rank order in which some stations serve as a first stepping stone while other organizations tend to hire experienced staff for crucial positions from other stations. Senior staff positions in commercial TV stations are usually in the hands of university graduates in business administration and consequently the management style is generally more business than media oriented. Looking at the internal organizational structure, most commercial stations seem to combine a strict hierarchy with an open and informal atmosphere. From our interviews it is clear that the culture of most companies is predominantly business and market oriented and much less public or critical. Commercial viability or success is considered a precondition for independent programming and critical journalism, suggesting that this will eventually develop in a later stage.

Although it is not easy to make a judgement on the basis of a limited set of expert interviews and site observations, it seems that the management is quite professional, not only at a rhetorical level but also in practice, with explicit attention for the main areas and aspects (like product management, marketing, human resources management and innovation). Nevertheless, it was hard to get our hands on the financial aspects, since there is no openness in this area. The stations are often owned by tycoons, whose exact role – remote or close to the operation – often remains unclear. Obviously they have invested heavily in both station

and infrastructure, but it remains hard to say if and when they will get return on investment and for how long they will continue to be willing to invest in these prestigious but costly TV-projects.

Innovation and high quality standards are considered important, but these are usually operationalized as primarily technical quality, a finding which is not uncommon in an Asian context. The basic program production facilities seem to be state of the art and studios and offices usually are looking brand new and quite luxuriously. Digital strategies and ways to reach out to the audience and building communities through digital stations and the Internet – currently the main issue within TV stations in Europe and the US – are still a bridge too far for Indonesian commercial TV stations. Moreover, most stations are still too small and not profitable enough to have explicit innovation, let alone new media strategies.

From an institutional perspective the old State and now officially public broadcaster TVRI is the perfect opposite of the above mentioned commercial TV stations. Most of the senior management of TVRI has been replaced recently, we are told, and even some ex-managers from commercial stations are hired to transform the old State broadcaster. But many of the rank-and-file employees are not media professionals in the first place, but former, and therefore usually older, employees of the Ministry of Information of which TVRI used to be a part. The organization pays about 60 per cent of its expenses to personnel costs and new blood can only be hired to the extent that the old people retire and leave the organization. New recruits are generally not above the age of 40. Also in other aspects the problems of the past still determine present performance of TVRI. In the past employees were paid a low flat fee for the job, irrespective of performance, and consequently many people did not show up, since they combined several jobs in order to make a living. The new management has taken measures to raise the salaries as well as the presence and performance levels of employees. Furthermore, their competences are being assessed. The central management has adopted the remit and rhetoric of independent public service broadcasters elsewhere in the world, but the present chairman is a former high-ranking military, related to the Golkar party, who told us that his primary task in both the military and the media is basically the same: to preserve the unity of the country. On top of all this institutional problems, the quality of the technical infrastructure, including the extensive chain of relay stations, is poor and both housing and production facilities look outdated.

In other words, the new management of TVRI talks in terms of a new public mission and a new managerial logic for TVRI, but reality lags behind. The shadows of the past, in terms of political control and bureaucratic management style, seem still strong. In all, it is not an overstatement to characterize the current Indonesian broadcast market as fiercely competitive. Consequently, this has turned the television products into a state of excessive sameness, trying to appeal to the same, most affluent audience groups.

Indonesian television from a comparative perspective

After a historical overview of the evolution of Indonesian television in a social context and an assessment of the present performance of the main Indonesian TV stations, we will now present an overall evaluation of the Indonesian television landscape and media policy from an internationally comparative perspective.

In the previous paragraphs we have characterized the Indonesian TV stations in the common categories of State, commercial or public broadcasting already, but in order to assess the Indonesian television landscape from a comparative viewpoint more carefully and to present our findings in a data matrix we need a more elaborate conceptual framework. The most classic conceptualization of the functioning of media systems in society is undoubtedly Siebert et al.'s (1956) 'Four theories of the press' in which they present four rationales for

organizing the mass media in any given society: 1) the ‘Authoritarian theory’, in which the press is a ‘servant of the State’, represents the oldest model that dominated in the West until the 18th century and still is found in several parts of the world; 2) the ‘Soviet-totalitarian theory’ is only a 20th century version of the Authoritarian theory for communist countries; 3) the ‘Libertarian theory’ is closely related to the rise of political democracy, religious freedom and, more in general, the general philosophical climate of the Enlightenment that undermined authoritarianism; 4) the ‘Social Responsibility theory’, finally, is a modification of the libertarian theory, supposing that also private media should serve as a public trust, taking their social responsibility seriously. This social responsibility theory of the press also functioned as an important inspiration for public service broadcasting, both in Europe and the US. Howard and Kievman’s (1986) more recent typology of world broadcast systems (see Table 2) looks quite similar, but reduces the number of broadcast models to three by combining the authoritarian and the soviet-totalitarian media models. The social responsibility model is characterized as ‘benevolent’ here, whereas the libertarian model is called ‘competitive’. The combination of the first two models is a useful correction to the cold war-thinking in Siebert’s model, whereas the other differences relate to the fact that the first typology stresses the theoretical and philosophical rationales of media systems in general and the second focuses more on broadcasting structures in particular.

 Table 2 about here

A more recent typology of media systems that caught considerable attention stems from Hallin and Mancini (2004). Resulting from their extensive empirical comparison of media and political systems in most countries of Western Europe and North America, Hallin and Mancini develop three ‘ideal types’: 1) the ‘liberal model’, mainly to be found in Great Britain and its former British colonies (United States, Ireland, and Canada) with strong media markets, high journalistic professionalism and a well organized but limited Government intervention; 2) the ‘polarized pluralist model’ with considerable levels of politicization, State intervention and clientelism in Mediterranean countries like France, Italy, Spain, Portugal and Greece; and 3) the ‘democratic corporatist model’ in the Scandinavian countries, the Netherlands, Austria, Switzerland, Belgium as well as Germany with high journalistic professionalism and consensual political systems that strongly rely on the role of organized social groups in society, as opposed to a more individualistic concept of representation in the liberal model. Hallin and Mancini’s typology (Table 3) has high comparative value, but it ignores considerable differences between national (broadcast) media systems and is, much more than the other models, confined to Western Europe and North America.

 Table 3 about here

In the following setup of a data matrix (see Table 4), we take Howard & Kievman’s typology with its underlying components as a primary frame of reference, but rename the trilogy to the more common distinction: authoritarian or State broadcasting, commercial broadcasting and public (service) broadcasting. Below we take this trilogy (State, commercial and public television) as a primary frame of reference, to be presented in the vertical columns of the data matrix. For the horizontal lines we selected a number of relevant aspects and criteria derived from both the performance assessment in the previous sections and the three broadcast

typologies just presented. In the final paragraph we will evaluate in which period and to what extent the Indonesian television landscape fits within these models. We assume that such a data matrix may offer a good opportunity to present the main evidence of the previous paragraphs, derived from both the desk research and the site visits. This visualization will eventually allow us to discuss the main trends and prospects of television performance and politics in Indonesia.

 Table 4 about here

From State to civil society?

Commercial television in Indonesia is still in its infancy: highly dependent on political goodwill for the continuation of its operations, it mainly consisted until the recent merger movement of single-channel operations, mostly owned by businessmen without tradition in the media field. Given the harsh competition, strategic planning is mainly defensive and short term oriented. The management is in the hands of very young staff with a business educational background and with only limited journalistic or creative expertise. This situation is not very unlike, but certainly more extreme than, that of many commercial television stations across Europe, where commercial television is also comparatively young. The focus on upper and upper middle classes of metropolitan areas is a consequence of both the available frequencies and consumption potential, heavily amplified by the fact that Nielsen market research only covers the metropolitan areas. Consequently commercial television in Indonesia targets at only ten percent of the total population, leaving less privileged people and regions to the former State broadcaster TVRI. Given the specific political context in Indonesia's market ideology, the marketing vocabulary is supplemented with politically correct mission Statements in line with the *Pancasila* pillars and a generally cautious program policy, building on entertainment and consumerism but at the same time carefully avoiding political and social conflict. Against this context of mainstream broadcasters, latecomer Metro adopted a niche strategy with more daring program formats, including satire. Ironically, the recent consolidation movement resulting in less players may result in both more internal and external program diversity.

Public broadcasting is formally institutionalized in the former State broadcaster TVRI, since the Broadcasting Act of 1996, and although the rhetoric of this institution has been carefully copied from examples elsewhere in the world, key appointments are *de facto* still political driven and developmental ideology still dominates independent public discourse. TVRI copes with tremendous organizational problems, ranging from limited resources and a large, mainly unmotivated staff to a large, but mainly outdated technical infrastructure. Here the central management is much older, and mainly originating either from their own ranks, politics or the military, although more recently also some people with a commercial background were hired. Revitalizing and turning the bureaucracy machine into a mean and lean professional organization with a primary orientation towards civil society is undoubtedly an immense task which, despite all good intentions, still has to happen. Looking backward, it seems that TVRI has missed the boat on several occasions and at present merely serves as a basic program provision for the underprivileged, mainly residing outside the big cities. Obviously this universal reach also represents the main potential asset of TVRI on which it can build its future survival strategy.

Contribution to the public sphere

Comparing the performance of the Indonesian public and private television stations with the main purposes of public broadcasting in Europe (cf. McQuail, 2005, Broadcasting Research Unit, 1985, Council of Europe, 1994) we observe that TVRI obtains better scores on the criteria of universal coverage and audience reach as well as of concern for national culture, language and identity. Compared to TVRI, the commercial channels certainly win on the criterion of a pluralistic and varied programming independent from both politics and the market. All broadcasters show only limited effort on the fourth criterion, i.e. their accountability towards society and the audience. Public accountability is usually of a financial nature and sometimes also based on (qualitative) audience research and direct feedback mechanisms (via telephone and the Internet). Given the dominant position of politics in this developing country, independence from politics is more crucial than independence of the – relatively weak and decentralized – market. We thus conclude that the contribution of commercial broadcasters to an open and independent public sphere in Indonesia is still higher than that of the official public broadcaster.

The weak position of public functions in Indonesian television, either formally or informally organized, is due to the lack of a rational-legal supervisory body and related procedures. Exemplary here is the position of KPI, which should, according to the Broadcasting Act of 2002, operate as a supervising authority, but is *de facto* bypassed by both vested political actors and business interests. This practice illustrates both the changing conditions – politics and business have reduced the role of civil society again – and the importance of informal relations with regard to formal-legislative authority.

Conclusions

We noticed that Indonesian television has undergone a gradual transition from an authoritarian or State model to a predominantly commercial model. The attempts by the legislative authority to establish a solid position for public broadcasting as a result of the recent democratization movement, exemplified in the transformation of the State broadcaster into a public one, the imposition of public duties to private stations and the installment of an independent broadcasting commission, have not been successful thus far. Decentralization required from the commercial stations as a contribution to a sound public communication system in the entire country is not seen to offer a viable business model for these stations and is therefore not materialized. In a young democracy with a weakly developed rational legal authority and with a tradition of clientelism, actual power usually prevails over institutionalized authority. The Broadcasting Act and the Indonesian Broadcasting Commission KPI are the products of a short period of democratization and revival of civil society, but meanwhile Indonesia went ‘back to business’ again.

During a brief episode, from 1998 till 2000, the interests of the television industry coincided with those of civil society. After that, business interests took over and this development has distanced the commercial television stations from the debate in Indonesian society about a more transparent and more democratic legal framework for broadcasting in Indonesia, as laid down in the Broadcasting Act of 2002. The latter reflected very much the spirit of democracy and decentralization, emphasizing the development of local/regional broadcasting organizations and the establishment of local and regional Broadcasting Commissions next to a national Indonesian Broadcasting Commission. This development threatened the national coverage licensing of commercial television stations, because it obliged them to go through a procedure via the local KPI, setting up a cooperation with local initiatives in every area of transmission. At the moment, both issues, decentralisation of

broadcasting and regulatory authority over the media are contested at the Constitutional Court.

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Appendix 1. Frame of analysis for each of the three perspectives

Supply Perspective (Remark: Programme genres still need to be determined for each of the TV channels under study.)

- 1 *Relationship between supply and aims:*
 - a. To what extent and how are aims in terms of supply being formulated by each of the TV channels considered?
 - b. Are priorities being formulated in terms of programme supply, now and in the future?
- 2 *Distinctiveness of the supply:*
 - a. What about the distinctiveness of the programme supply? Distinctiveness will be looked at in terms of pluriformity (i.e. diversity, variety in genres, issues dealt with, people shown), innovation, independence (from Government, market).
 - b. What about the conditions for programme-making when comparing to neighbouring countries such as Malaysia, the Philippines, Vietnam?
- 3 *Presentation of the supply:*
 - a. To what extent distinctive programming (compared to the other TV channels on the market) is being realized?
 - b. To what extent is the identity of the TV channel under study being guaranteed?

Audience Perspective (Remark: here too the Nielsen audience ratings will be taken as an important instrument to select some excellent and some less successful programmes, programme genres, per TV channel under study.)

- 1 *Reach audience groups:*
 - a. To what extent the targets in terms of audience shares are being realized?
- 2 *Aims with regard to audience groups:*
 - a. To what extent does the programme supply respond to the mission of the TV channel? (if applicable: confronting, informing, amusing, learning, surprising, etc.)
 - b. To what extent the audience does experience this likewise?
- 3 *Recognizability of the supply:*
 - a. Is the presentation of the supply clear and recognizable for the audience?
- 4 *Public accountability:*
 - a. In what way the TV station accounts to the audience (e.g. through the KPI)?
 - b. In what way the audience is involved in the programme supply?

Organization/Development perspective (Remark: here the context factors (or lack thereof) allowing for quantity and quality aimed at in the programme supply are looked into.)

- 1 *Organizational culture:*
 - a. To what extent do the different programme production units feel linked/in line with the general management of the TV station?
- 2 *Financial resources:*
 - a. Are the processes of attributing financial resources transparent?
- 3 *Structure and management:*
 - a. In what way does the management contribute to efficiency and co-ordination?
- 4 *Innovation:*
 - a. To what extent and in what way are innovative ambitions being formulated at the level of the overall station? If so, is this ambition shared by the professionals at your programme production unit?
 - b. To what extent are innovative ambitions at your station in line with the ambitions of other comparable TV stations in Indonesia (if applicable) or in the neighbouring countries (such as Malaysia, the Philippines, Vietnam)?

Table 1. Television Landscape – Main National Players, 2007 (AGB Nielsen Research; Clarity Research, 2007)

TV channels	Year of establishment/ first on air	Current status (merged or still independent)	Market share (Sept. 19-25)
TVRI	1962	Independent	1.4
RCTI	1987	Merged (MNC)	19
SCTV	1989	SCM/Independent	17.3
Trans TV	2001	Merged (TransCorp)	12.1
Trans 7 (previously TV7)	2001 and re-launch in 2006	Merged (TransCorp)	6.4
INDOSIAR	1995	Independent	14.2
TPI	1990	Merged (MNC)	12.6
Lativi	2001	Merged (STAR Group)	4.5
Anteve	1993	Merged (Bakrie/STAR Group)	4.2
Global TV	2001	Merged (MNC)	5.1
Metro TV	2000	Media Group, Independent	1.9

Table 2. World Broadcast Systems (Howard & Kievman, 1986: 2)

	Ownership	Funding	Program	Example
Authoritarian	State	State	State Goals	(USSR)
Benevolent	Public Enterprise	Levy (adv/subs)	Informed Society Public Taste	BBC
Competitive	Private Enterprise	Advertising	Audience Reach	USA

Table 3. Comparing Media Systems (Hallin & Mancini, 2004)

COMPARING MEDIA SYSTEMS	Mediterranean or Polarized Pluralist Model	North/Central-European or Democratic Corporatist Model	North Atlantic or Liberal Model
Political history: conflict / consensus	Late democratization; polarized pluralism	Early democracy; moderate pluralism	Early democracy; moderate pluralism
Consensus or Majoritarian Government	Both	Consensus	Majoritarian
Role of the State	Dirigism	Strong welfare State	Liberalism
Rational Legal Authority	Weak; clientelism	Strong	Strong
Countries	France, Greece, Italy, Portugal, Spain	Austria, Belgium, Germany, Netherlands, Sweden, Switzerland	United Kingdom, United States of America, Canada, Ireland

Table 4. Television Models in Indonesia on the Basis of our Performance Assessment and in light of Howard & Kievman's (1986) and Hallin & Mancini's (2004) Typologies

TV models: Aspects:	STATE	COMMERCIAL	PUBLIC
<i>Period</i>	1962-1998	1 st & 2 nd waves 1987-95 & 2000-02	1998 – present
<i>Ownership</i>	Government	Private 1 st wave: Suhartu clan, political control, telephone culture 2 nd wave: national businesses, more distance from Government	TVRI; public institution, political appointments
<i>Mission</i>	<i>Pancasila</i> , nation building, social development	Political rhetoric + marketing vocabulary	TVRI: unity, universal service, serving civil society
<i>Program</i>	SARA-doctrine	1 st wave: no news Mainstream (competition) Entertainment (drama)	TVRI: news & information Comm. TV: independent news, beginning satire Limited diversity
<i>Audience</i>	Universal reach: all Indonesians, all regions, all classes	Upper/middle class Metropolitan areas Nielsen ratings	TVRI: country (outside Jakarta), limited share Comm. TV: main cities
<i>Management / organization</i>	Bureaucracy under the Ministry of Information	Short term planning Young staff / management Financial accountability	TVRI: formally PSB, limited resources, reluctant to change Comm. TV: also taking up public responsibility
<i>Political context</i>	Post-colonial, young country, SARA doctrine	Asian tiger: 'Open market, open sky' policy: consumer, advertiser demands	<i>Reformasi</i> : democratic reform, decentralization 1998: Comm. TV joins TVRI becomes 'public'
<i>Legal authority</i>	Monopoly; Ministry of Information	Liberalization policy: market, civil society	Broadcasting Act 1996 KPI: weak institution
<i>Stations</i>	TVRI	1 st wave: SCTV, RCTI, Indosiar, Antev, TPI 2 nd wave: Metro TV, Trans7, Global, Lativi	TVRI: formally Comm. TV: SCTV, Metro deliver 'public' content