



Local TV Stations Post Analog Switch Off: Economic Challenges

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Abstract. The government policy to switch off analog television at the end of 2022 (Analog Switch Off-ASO) still presents problems for non-NBS (Networked Broadcast System) private local television operators and the public. Related issues include many people requiring to purchase Set Top Boxes to access the digital broadcasts. Non-NBS private local television stations have to pay multiplexer rental fees, which are more expensive than previous analog television operation costs. This study aims to reveal the dynamics of non-NBS private local television management in East Java from the perspective of the media economy. This study uses an exploratory qualitative method with three data collection techniques: in-depth interviews with three non-NBS private television managers, an FGD with local television managers and East Java KPID, and documentation of ASO regulations. The results show that non-NBS private television stations have limited content production ability, both in terms of the quantity and quality of human resources. Non-NBS private television operators are still determining if the public can access digital TV broadcasts, so they must do simulcasts with the consequence that operational costs must increase significantly. While digital broadcasting does not necessarily bring in advertisements, analog broadcasts must continue to run to maintain public trust; non-NBS private local television stations are faced with the choice of increasing revenue or stop broadcasting altogether. Ultimately, the managers of non-NBS television stations in East Java must developed other sources of income based on the uniqueness of their audience.

Keywords: Analog Switch Off · Local Television · Media Economy · Digital TV

1 Introduction

ASO is an Indonesian government policy that regulates the migration of analog television broadcasting to digital television broadcasting. As a consequence of this ASO policy, analog television will no longer be able to be broadcasted. For national mainstream television stations that adopt ASO, this policy will not have a significant impact on their finances. However, this policy greatly influences the finances of non-NBS (private and community television stations with no networked stations or single broadcaster) local television broadcasters that adopt ASO [1]. In 2012, a study by Prabowo predicted that local television and communities will experience difficulties with broadcast digitalization, and this will cause these television broadcasters to burn out in the competition

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Y. A. Yusran et al. (Eds.): BIC 2022, AEBMR 235, pp. 276–287, 2023.

https://doi.org/10.2991/978-94-6463-140-1_27

in the Indonesian broadcasting industry [2]. A study by Firdaus also reveals that local television is still learning to adapt to the ASO policies of the government [1].

The adoption of the ASO policy by local television broadcasters has significantly impacted the finances of local television stations. For example, renting multiplexing for local television stations will increase operational costs [3]. Content production to fill a longer broadcast duration will also increase operational costs [4], and the revenue from advertising for local television stations is still minimal compared to national television stations. Even the total number of advertisements can only make up a portion of the operational costs of digital television broadcasts. This condition is part of the concentration of media industry studies from a media microeconomic perspective which seeks to investigate the spectrum of the media industry from the economic dimension [5].

From the perspective of the media economy, the ASO policy is a dilemma for local non-NBS television operators. If they do not adopt, they will no longer be able to continue broadcasting, but if they do decide to adopt, then it may disrupt the cash flow of the company. The option for a non-NBS local television station that is no longer capable is not to broadcast. However, if local non-NBS television operators want to survive the broadcasting business competition, they must try hard so that their company's finances can run smoothly. However, the media industry must be open to new communication technologies, and according to Lucy Kung, media management should have a relaxed attitude toward technological change [6]. If media managers have an inertial attitude, the sustainability of the media will be threatened. Likewise, Junaedi explains that the media business is a business that follows technological developments, meaning that when technology changes, media management strategies must also change to respond to technological changes [7].

As a government policy, ASO is a consequence of technological developments requiring management adjustments for the broadcast media industry [8]. These management adjustments are inseparable from the local factors of the media audience. A study by Ji & Lee explains that the media must have unique characteristics as an advantage in business competition facing social, cultural, economic, and technological changes [9]. This type of media uniqueness is possessed by non-NBS local television operators because they are considered to be closer to the audience in their area [10, 11]. Furthermore, Ji & Lee revealed that a unique media can serve as an identity for television broadcasters to compete in the market. Therefore, it may benefit the television business if this uniqueness is managed properly.

From the perspective of the media economy, studies about ASO have been conducted in Indonesia. Recent ASO studies in Indonesia have so far focused on the design of administrative policies from the government [12, 13] and ASO studies in a critical perspective of the media's political economy [3]. More studies talk about the culture of watching terrestrial to digital television [14]. Studies by Firdaus and Mubarak & Andjani have the readiness of local television and communities relating to broadcasting digitization policies [1, 4]. Azmi researched the broadcasting business model in the era of the digitalization of television broadcasting [15], while Ismail et al. studied community readiness to accept the conversion of analog television to digital, as well as the dynamics of the state, private sector, and society in broadcasting digitization policies [16].

Following up on the trend of ASO policy research and local television in Indonesia, this study seeks to reveal the dynamics of the management of non-NBS local television in East Java in dealing with ASO policies within the framework of a media economy perspective. As explained by Albarran, media economy perspective provides a broad investigation ranging from the economic management of the media industry (micro) to the impact of the media industry on the country's economic growth (macro) [5]. We use a micro media economy perspective to reveal the dynamics of managing non-NBS local television media in East Java in the face of ASO policies.

2 Methods

This study uses a descriptive qualitative approach to describe the dynamics of non-NBS television management in East Java in the face of Analog Switch Off (ASO) policies within a media economy perspective framework. According to Neuman & Robson, a qualitative approach is used to produce in-depth data in the form of textual/verbal data that can explain a social problem based on its natural setting [17]. With this method, the researcher aims to describe the dynamics of managing local non-networked TV companies in dealing with and preparing for ASO.

2.1 Data Mining Techniques

This study uses three data mining techniques: in-depth interviews, a Focus Group Discussion (FGD), and documentation. First, in-depth interviews were conducted with three non-NBS television managers in East Java, namely Informants Y1 (ABTV), Y2 (TV9 Nusantara), and Y3 (Madu TV). ABTV has the criteria of a local TV station based on a blend of the latest local values, traditions, religion, and the latest trends through a local packaging. TV9 Nusantara is a television station based on the religious mass organization of Nahdlatul Ulama with a network of *pesantren* (Islamic boarding schools). MaduTV is the result of pioneering development and driving community radio based on Islamic boarding schools with business fields. The in-depth interview technique was semi-structured, namely the interview questions were prepared first and then the researcher will develop questions based on the answers from the research informants.

The second technique was through an FGD with non-NBS television managers in East Java. This FGD was conducted with the East Java KPID as an independent state institution in the broadcasting sector. The FGD technique was conducted naturally with the moderator being from the KPID and the researcher acting as a participant informant, as well as asking questions and discussing the management of non-SJJ television media in East Java in the face of the Analog Switch Off (ASO). Third, documentation of ASO policy regulations from the Communications and Information Technology including the Minister of Communication and Informatics Regulation No. 22/PER/M.KOMINFO/11/2012, Press Release No. 65/PIH/KOMINFO/7/2012; Press Release No. 34/PIH/KOMINFO/4/2013; and Article 26 of Law Number 11 of 2020 concerning Job Creation.

2.2 Data Analysis Techniques

The interactive qualitative data processing technique from Miles, Haberman, & Saldana was used to analyze the data obtained from in-depth interviews, FGDs, and documentation. Interactive data processing was carried out through three stages continuously to obtain saturated data that answers the problem formulation and fulfils the objectives of this study. The three stages of this interactive analysis include: 1) Condensation, which is condensing the data obtained by describing and providing codes that can later form patterns and categorization; 2) Data presentation, namely narrating the codes to obtain patterns and categorizations that can explain the problems studied; 3) Drawing conclusions and verification, which are steps to reflect on the data obtained, whether the data have reached saturation and can answer the problem formulation and fulfil the research objectives [18].

3 Results and Discussion

3.1 Multiplexing System: Creating Unfair Business Between “Local” and “National” TV

One of the policies of ASO is to regulate the implementation of multiplexing broadcasts or so-called multiplexers (Ministry of Communication and Information Number 22 of 2012). Operators of multiplexing or multiplexers (large broadcasting business institutions and the parent of networked private television stations) consist of private broadcasters and public broadcasting institutions (TVRI). The Ministry of Communication and Information determines the multiplexer selection technique from the private sector. Meanwhile, TVRI, as a multiplexer for public broadcasting institutions, is set by the Ministry of Communication and Information through the Ministry of Communication and Information Regulation 22/2012, TVRI (LPP). Considering the requirements of a multiplexer owned by a private broadcasting institution, it can be ascertained that only large private broadcasters that already have networks in the regions are winners in the auction of multiplexing providers.

Maulana argues a political economy interest behind the success of the television broadcasting industry conglomerate as a multiplexer of the Private Broadcasting Institution [3]. The victory was predictable because of infrastructure only they could fulfill. In addition, the television broadcasting industry conglomerate will benefit from the multiplexing lease. From the perspective of the media economy, according to Albarran, media regulations made by the regulatory body have a relationship with the media economy, whether it is a positive relationship (beneficial to the media industry) or a negative one (detrimental to other media industries) [5]. This can lead to inequality, with some media industries benefiting and part of the media industry suffering losses [3]. From a political economy perspective, this multiplexing rental system will create dependence of local non-networked television broadcasters on the broadcasting conglomerates. The following is a table of multiplexer winners from LPS (Table 1).

Service Zone 7, which serves the broadcast area of East Java, is controlled by the giants of the Indonesian broadcasting industry, as stated in the research [19, 20]. The control of this broadcast media giant also confirms Vincent Mosco argument that strong

Table 1. List of Private Broadcasters as Mux Providers

Service Zone	Broadcaster/Mux Provider	Service Zone	Broadcaster/Mux Provider
Service Zone 1 (Aceh dan North Sumatera)	RCTI Network ANTV Medan Trans7 Medan Metro TV Aceh Indosiar Medan	Service Zone 6 (Central Java and Yogyakarta)	Global TV Indosiar Semarang TVOne Semarang Metro TV Jawa Tengah Trans TV Semarang
Service Zone 4 (Jakarta and Banten)	BSTV TVOne Metro TV SCTV Trans TV	Service Zone 7 (East Java)	ANTV Global TV Metro TV SCTV Trans TV
Service Zone 5 (West Java)	ANTV Bandung Indosiar Bandung Metro TV Jabar RCTI Network Trans TV Bandung	Service Zone 14 (East Borneo and South Borneo)	Trans7 Samarinda Global TV TVOneSamarinda Metro TV Kalsel SCTV Banjarmasin
Service Zone 15 (Riau Islands)	RCTI Network SCTV Batam Trans TV Batam		

Source: adapted from Maulana [3]

actors who own capital can intervene in the ‘cultural structure’ in the form of large media intervention (agents) [21]. This information can be found in the Ministry of Communication and Information regulation relating to the selection of the Multiplexing Organizing Broadcasting Institution (MOBI).

We found that non-NBS television managers in East Java were aware of the political and economic interests behind the ASO policy. However, non-NBS television managers, as small players in the large structure of the television broadcasting business in Indonesia, need more power to create a fair business culture in the ASO policy. This was explained by informants Y1 (ABTV), Y2 (TV9), and Y3 (Madu TV) who were aware that the ASO policy was not profitable for their business, but they have no choice but to adopt it. This resulted in higher costs because they have to rent multiplexing from multiplexers which makes operating expenses even higher – with the advantage being only technical in nature, namely a clearer broadcast quality. In other words, the ASO policy does not favour non-network local television stations.

Non-network television broadcasting managers face the dilemma and dynamics of managing digital broadcasts, particularly in finding a financial balance between the costs of digital broadcasting operational expenses and income from digital broadcast operations. I formulate this dilemma and dynamic in three ways; *first*, local non-networking television managers are unlikely to turn off simulcast broadcasts because they will potentially lose a significant number of their audience. Informants Y1 (ABTV) and Y2 (TV9)

reasoned that they still maintained analog broadcasts even though they have migrated to digital broadcasting because people need to fully understand digital television, especially from a technical point of view. Furthermore, simulcast broadcasts (analog and digital) prove to be costly for local non-network television, which does not automatically result in revenue from the advertising generated.

Second, digital broadcasts from non-network local television have yet to generate or even increase revenue, while at the same time incurring operational costs from multiplexing rentals. According to informant Y1 (ABTV), his party has migrated from analog to digital since early 2022 (simulcast broadcast). However, economically speaking, digital broadcasts from ABTV have yet to gain attention from the audience with viewers numbering less than analog broadcasts. Therefore, according to informant Y1 (ABTV), analog broadcasts run by ABTV have yet to generate financial income. Madu TV also experienced the same thing. According to informant Y3, Madu TV has migrated to digital (simulcast broadcast) since 2020. However, digital broadcasts have yet to generate financial income, instead adding to their burden because of the multiplexing rental fee from the multiplexing provider.

Third, the increase in operational costs due to simulcast broadcasting differs from the advertising revenue earned. The third dilemma of local non-NBS television managers is the accumulation of the first and second dilemmas. Simulcast costs more than single-cast broadcasts. However, it is impossible for non-NBS local television to choose only one of these broadcasts. For example, as explained by Y2, if TV9 Nusantara only broadcasts on analog, then it will no longer be able to broadcast on November 22, 2022. On the other hand, if TV9 Nusantara only broadcasts digitally, then no one will watch their programming because the audience needs to understand the consequences of digital broadcasting on their television sets. Therefore, simulcast broadcasting is still better for the time being, while hoping that the government will take real action regarding the consequences of digital broadcasting on the public.

3.2 Production Capacity of Non-NBS Local Television Programs

One of the characteristics of non-networked local television stations is broadcasting program content that are close to their audiences. We found non-NBS local television content in East Java (ABTV, Madu TV, TV9 Nusantara, Dhamma TV, and Dhoho TV) to be centered on cultural, entertainment, religious, and news narratives. We found that the news content of Madu TV and TV9 Nusantara were no longer just information on events in their coverage area but had expanded beyond their coverage areas. According to Y2 (TV9) & Y3 (Madu TV), news broadcasts that inform events outside of their coverage are a joint policy of the editors to expand broadcast coverage through convergence by utilizing new media. With the convergence of new media, non-networked local television content can be viewed by audiences anywhere by taking advantage of new media access [22].

Another real problem faced by non-networked local television stations is the ability to optimize airtime. Non-NBS television stations need more effort or capacity to produce broadcast content to fill longer durations of digital broadcast programs. From an economic perspective, the cost of producing broadcast content will often increase with the availability of broadcast duration for 24 h because of multiplexing rentals. However, this

increase does not necessarily contribute directly to revenue (Informant Y3, Madu TV). With this increase, we managed to categorize several non-networked local television strategies in producing content for free or at minimal cost but can earn revenue from advertising and other sources.

First, non-networked local television stations can utilize contributors for news production. TV9 Nusantara and Madu TV have contributors in various regions around and outside of East Java province. Contributors work with a remuneration system according to the news content they produce, the number of the content generated for one month will be accumulated to obtain their monthly remuneration. According to informant Y3 (Madu TV), the contributors can come from those interested in journalism and reporters/journalists from other media who distribute their work to Madu TV and other television stations. Informant Y2 (TV9) explained that the contributors have one assistant responsible for collecting and distributing content to TV9 Nusantara.

Second, non-networked local television stations can utilize a citizen journalism strategy to obtain news content. Non-NBS local television managers provide opportunities to the public to become citizen journalists, which can also serve as a strategy to obtain 'free' broadcast content. However, according to informants Y2 and Y3, citizen journalism content are often not deemed suitable to be broadcast on television due to inadequate video quality and the information lacking news value. Furthermore, informant Y2 (TV-9) explained that there needs to be a higher interest for the public to be involved in citizen journalism, so that the content can be of a better quality. However, TV9 Nusantara is still considering accepting citizen journalism content to strengthen the diversification of their broadcast content. Content diversification will encourage the creation of a democratic broadcast climate. If citizen journalism runs well on local television, it can strengthen local democracy because it fosters public participation in public spaces [23, 25].

Third, non-networked local television stations can cooperate with the private sector/government to create content. We found that non-networked local televisions such as Madu TV and TV9 Nusantara, although normatively, are not classified as part of NBS television. However, in practice they have networks in content production. For example, Madu TV collaborates with Al-Bahjah TV and Badar TV for various Islamic da'wah content in collaboration with the Ministry of Education and Culture institutions for cultural content. Madu TV also broadcasts several programs from the UBTV Community TV Station. The same is done by TV9 Nusantara, which collaborates with a network of media teams from NU-based lodges in Indonesia to obtain da'wah content from NU clerics. TV-9 Nusantara also collaborates with Indonesian TV (a channel from the Ministry of Education and Culture) to obtain educational and cultural content that can be rebroadcasted. This finding shows that although in legal terms television stations such as Madu TV and TV9 Nusantara are classified as non-networked, they still have developed networks, especially for producing content.

Fourth, local television stations can utilize their target community to obtain television broadcast content. We found that the management of TV9 Nusantara was building a media team consisting of students from NU-based Islamic boarding schools. The media team was fostered to produce da'wah content from charismatic Islamic scholars and religious activities from Islamic boarding schools. TV9 Nusantara obtains broadcast content from the media teams from the Islamic boarding schools. According to informant

Y2, the training provided to the media team is about serving, and this is inseparable from the ideology of TV9 Nusantara to serve people through its broadcasting agencies. TV9 Nusantara does not ask for content from the boarding school media teams. However, it is provided by the boarding school media teams so that they can be broadcast through TV9 Nusantara's broadcast frequency.

3.3 Other Legitimate Business Development and Collective Strategies

Our previous findings regarding the awareness of non-networked television station managers of the political economy of Multiplexing Provider Broadcasting Institutions in ASO policies have given rise to unequal praxis. However, this praxis does not lead as intended by the critical paradigm by changing the unequal and unfair structure in the broadcasting business competition. Non-networked television managers try to present praxis by changing the non-networked television management strategy, both individual (institutional) and collective. This non-networked television management strategy is not a form of resistance to the dominance of giant private broadcasting institutions in broadcasting digitalization, but it is one their efforts to survive and earn profits.

Non-networked local television station managers realize that they may be unable to compete in terms of advertising revenue with networked national mainstream television stations, especially when new advertising media is developing in internet-based media [26]. Informant Y1 (ABTV) revealed that local television cannot compete for advertising revenue with national television because their ratings are still inferior. Even in many districts and cities in Indonesia, the ratings level of the program needs to be identified by independent survey institutions such as AC Nielsen. Therefore, non-networked local television must be able to explore the potential in the region to obtain income, both the potential to be used as content and other types of potential that can generate income for television media agencies.

We formulate another potential for generating revenue for non-networked local television stations in terms of other legitimate income, namely the income earned by them outside of its main income (advertising) as a broadcasting business. Following Government Regulation No. 25 of 2005 concerning the Implementation of Private Broadcasting Institutions, and updated with PP. 46 of 2021 concerning Post, Telecommunications, and Broadcasting, the income of private broadcasters can derive from sources of other legitimate businesses other than advertising. This legitimate income is recognized by informants Y1, Y2, and Y3 and supports the operations of non-networked local television broadcasting to survive when facing pressure from national television oligopolies [3]. Other legitimate revenues from Madu TV, ABTV, and TV9 Nusantara include the following:

The Madu TV broadcaster develops other legitimate income through the sale of herbal products by Madu TV. The herbal products are also advertised through Madu TV, so there is no need to spend money to advertise them in other mass media. In addition, Madu TV also created a special talk show program which discusses about the herbal products they sell – these herbal products have the brand 'BIO HAS'. We have collected documentation of the advertisements for BIO HSA products and health dialogues on Madu TV, which discusses BIO HSA as one of their other legitimate income-generating businesses. However, the success of Madu TV has failed to be replicated by one of

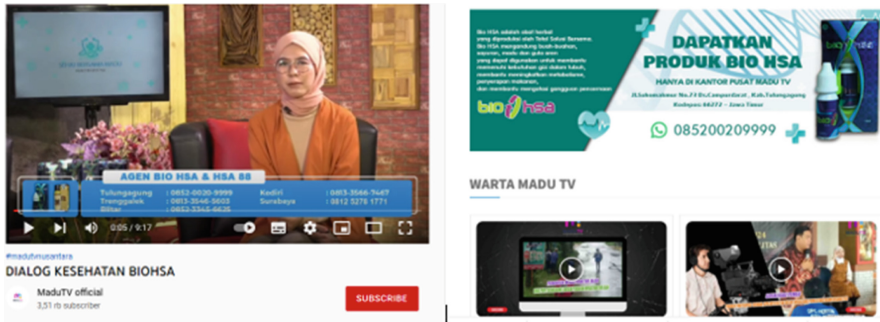


Fig. 1. Visual of a Health Program promoting herbal health products. Source: MaduTV Youtube Channel.

Malang's non-networked local television stations, which synergized with other legitimate products. In their case, it was not successful, and the station lost money and ultimately ended their broadcasting business. The creativity of broadcasting institutions is very much needed in overcoming the unfair competition with national broadcasters (Fig. 1).

In another case, ABTV has developed other legitimate income by taking advantage of the ASO policy by selling STB to the people of Blitar who wish to switch from analog to digital broadcasts. In addition, ABTV has also developed other legitimate income by conducting off-air activities, such as selling agricultural products and expanding their scope of coverage to regional communities. The agricultural products are not produced by ABTV but by a private company from Semarang, where they have previously been advertised on ABTV. ABTV managers carry out this other legitimate income to obtain additional income to support broadcast operations in a simulcast format. Unlike the case with TV9 Nusantara, the manager develops other income by utilizing the NU-based boarding school network from TV9 Nusantara. TV9 Nusantara utilizes this network of Islamic boarding schools by selling the books needed by these Islamic boarding schools, acting as a drop-shipper for these books and serves as another source of legitimate income. Findings regarding other legitimate incomes are a unique medium for each non-NBS local television stations in facing ASO's business competition policy [9].

On another note, the managers of non-networked local television stations in East Java also discussed the formation of a 'consortium' to deal with the digital broadcasting business due to the ASO policy. Another way to compete with giant media industries is to develop a consortium that will provide a content database. The consortium consists of local television managers in East Java to compile a content database, distribute advertising portions from private/government advertising agencies, and form a collective strategy to generate other legitimate income for each television station member. From the results of the FGD conducted, it was decided that the East Java Regional Indonesian Broadcasting Commission will also be involved in the consortium to bridge between the consortium and government agencies that can be a source of advertising for consortium members.

4 Conclusion

Our research concludes that non-networked local television stations in East Java face a dilemma in adopting the government's ASO policy. On one hand, they must adopt if they want to continue broadcasting. While on the other hand, digital adoption will further increase the operational costs of non-NBS local television broadcasts. The increased operating costs did not significantly impact on revenue from advertising through digital broadcasts. Furthermore, non-networked local television broadcasters are unlikely able to compete with the National Giant Broadcasting Institution in advertising revenue. Finally, non-networked local television stations must develop other legitimate incomes according to each of their uniqueness and potential. Another way to survive is to discuss the formation of a consortium of East Java non-NBS local television stations to form a collective management strategy in the face of digital broadcasting business competition. We provide recommendations for further research to examine the 'other legitimate incomes' of each local television in East Java so that local unique television media can discover the other sides of the business they run.

Acknowledgments. We declare that the results of this study have no potential conflicts of interest with all parties involved. We would also like to thank the Research and Community Service Agency of FISIP Universitas Brawijaya who have provided financial support for this research through the 2022 Research Grant Program.

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