



Mapping Television ownership concentration in West Java after the Analog Switch-Off

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ABSTRACT

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Broadcasting digitization in Indonesia reached a major turning point with the implementation of the Analog Switch-Off (ASO), as mandated by the Job Creation Law No. 11 of 2020. This policy requires television stations to migrate from analog to digital broadcasting, which brings significant changes to technological advancements and the broadcasting business ecosystem, especially in the media ownership structure. Prior to the ASO, television ownership in West Java was highly centralized and dominated by a few large media groups, which impacted the diversity of content production and distribution. This study aims to analyze the impact of the ASO on the concentration of television ownership in West Java and see whether this transition encourages media diversity or strengthens media conglomeration. Using a qualitative approach with descriptive case study method, this research utilizes Anthony Giddens' Structuration Theory to explore the relationship between media ownership structure and agency in the post-ASO era. Data was collected through in-depth interviews with representatives from television stations and industry stakeholders, supported by document analysis. The findings reveal that despite regulatory changes, media ownership remains concentrated among large networks, limiting opportunities for independent and local television stations to thrive. The study highlights that structural barrier, including financial constraints and regulatory complexity, hinder the democratization of media ownership. In conclusion, while ASO provides the potential for a more diverse broadcasting landscape, existing power structures still dominate, necessitating further policy interventions to promote fair competition and ownership diversity in Indonesia's digital broadcasting era.

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1. Introduction

The development of broadcasting digitalization in Indonesia entered a new phase with the issuance of the Job Creation Law Number 11 of 2020 broadcasting cluster that makes Indonesia actively adopt digital television (Santoso, 2024; Zulkarnain & Saputri, 2022). The migration process from analog to digital television broadcasting (Analog Switch Off) is an effort by the government to improve broadcast quality, spectrum efficiency, and provide a better viewing experience. Several

television stations in Indonesia have switched to digital broadcasting, and viewers are slowly starting to adopt digital television receivers or set-top boxes to enjoy the broadcasts (Abdullah, 2020).

The policy of implementing Analog Switch Off is regulated in Law Number 11 of 2020 on Job Creation of Broadcasting cluster article 60 A which reads "Broadcasting implementation is carried out by following technological developments, among others by migrating broadcasting from analog technology to digital technology". The issuance of this policy marks the end of analog television in Indonesia as well as revising several articles in Law Number 32 of 2002 concerning Broadcasting, of course this is a great opportunity for the television broadcasting industry business ecosystem (Sjuchro et al., 2023).

The broadcasting business ecosystem cannot be separated from the relationships between actors that influence the ownership of television broadcasting institutions. Prior to the implementation of the Analog Switch Off policy in Indonesia, especially in West Java, a centralized network of television ownership had been formed which had an impact on the production and distribution of broadcast content. This can be seen from the concentration of television ownership controlled by several groups, in West Java there are televisions that have network affiliations with certain groups such as Media Group, EMTEK Group, Trans Media, Viva Group, MNC Media and Jawa Pos Group. Indirectly, the map of television ownership in West Java is controlled by several television groups, this ecosystem certainly makes the existence of television unattractive and deviates from the basic principles of the implementation of Analog Switch Off and Broadcasting Law, one of which is the realization of diversity of ownership. Lintang Ratri Rahmiaji in the book *Democracy Without Demo* (2021) argues: "Since the beginning, Law No. 32/2002 on broadcasting was drafted with the spirit of reform that contains elements of democratization, forming a healthy broadcasting system and in favor of the public. The policy on content diversity and ownership diversity is the basis of every article, this is to ensure the democratization of broadcasting, where the state must guarantee citizens have the right of access to opinion, economic rights and the right to obtain, produce and disseminate information which is expected to realize the diversity of broadcast content." (Ratri Rahmiaji, 2021).

The implementation of Analog Switch Off is indirectly able to present the diversity of television ownership in West Java, this condition is the spirit of the creation of broadcasting democratization, with the diversity of television owners it can open up broad business opportunities so as to indirectly create new jobs (Zulkarnain & Saputri, 2022). In accordance with the mandate of Law Number 32 Year 2002 on Broadcasting, it has closed the opportunity for media conglomeration practices, indirectly this policy supports the diversity of ownership in the television broadcasting industry, the merger or union between media makes the emergence of monopoly in a media system

(Webbink, 1973). This condition causes the presence of monopolies that have the potential to control the production and flow of communication, information and entertainment (Khumairoh, 2021). This condition makes television that has a small scale business will slowly be amputated because it does not have the ability in terms of business capital and the spirit of democratization of broadcasting will not be realized (Bracken, 2006; Pamungkas, 2022; Wilson, 2020).

Basically, the practice of media conglomeration occurs when media companies unite into a larger company in terms of business, which is done by buying shares or making acquisitions (Khumairoh, 2021). The occurrence of media conglomeration has made business competition between television media owners unhealthy, causing several changes. One of them is in the process of distributing broadcast content, which is not objective and is closely related to individual or group interests (Muchiri et al., 2020). Of course, this reality is very contrary to the principle of Broadcasting Law which states that the media must be an independent, objective and neutral institution (Caesarani, 2023; Hkikmat & Sinaga, 2022).

According to Mosco (2009) in his book *The Political Economy of Communication*, media ownership by a handful of elite entrepreneurs causes social ills. The focus of political economy is directed at the control of ownership and operational power of a media. The existence of mergers or unification between media makes the emergence of monopolies in a media system, this condition causes the presence of monopolies that have the potential to control the production and flow of communication, information and entertainment (Khumairoh, 2021). This condition makes television that has a small scale business will slowly be amputated because it does not have the ability in terms of business capital and the spirit of democratization of broadcasting will not be realized (Ahmadipour & Wigger, 2021).

Novelty This research provides a new perspective in looking at the impact of the Analog Switch-Off (ASO) policy on television ownership at the regional level, especially in West Java. Unlike previous studies that mostly discuss the technical aspects of migration from analog to digital or its impact on audiences, this research focuses on changes in the structure of media ownership and how television industry players adjust to the post-ASO digital broadcasting ecosystem. Using Anthony Giddens' structuration theory, this research offers a mapping of television ownership relations in West Java that has not been widely discussed in previous studies.

One of the interesting things in this research is how the ASO policy, which is supposed to encourage diversity in media ownership, is still faced with the challenge of dominance by large media groups. This phenomenon shows that although regulations have provided restrictions on media conglomeration practices, the reality on the ground shows that small-scale televisions still face structural barriers to compete with large televisions. This research is also interesting because

it explores the direct experiences of various owners and managers of local television stations in West Java, so that it can provide an empirical picture of how they adapt to these policy changes.

The urgency of this research is that the results can be used to evaluate the ASO policy in the context of broadcasting democratization. If the main objective of ASO is to increase diversity of ownership and broadcast content, then there needs to be an in-depth study of how this policy impacts local and independent television. The findings of this research can also be a recommendation for the government and broadcasting regulators to formulate policies that favor diversity and the sustainability of local television in the digital ecosystem. In addition, this mapping of television ownership in West Java can be a reference for academics, policy makers, and media industry players in understanding the dynamics of post-ASO media ownership.

Based on this, the researcher uses Anthony Giddens Structuration Theory. Structuration theory views that existing social systems would not exist without actors or agents who create them, but in this context it does not mean that actors give birth to social systems, but rather that actors change or reproduce existing systems by rearranging them (Giddens, 2010). The actor in this theory is a human being where the actor has a goal in carrying out the activities carried out and can explain the reasons for his actions. Social activities carried out by humans are recursive, where the purpose of the existing activities is not carried out by social actors but is produced in order to express themselves as agents by utilizing all resources that can indeed be useful.

Therefore, the researcher tries to provide a mapping related to television ownership in West Java after the implementation of Analog Switch Off by looking at the relations between actors in the broadcasting industry using structuration theory by interviewing several television stations in West Java that are networked or independent in terms of ownership, namely Radar TV Tasik, SM TV, Bandung TV, MGS TV, BR TV, Chairman of the Indonesian Digital Broadcast Television Association.

This research aims to reveal the ownership map of television stations in West Java after the implementation of the Analog Switch-Off policy. Simply put, the Analog Switch-Off (ASO) policy has changed the broadcasting landscape in Indonesia, including in West Java. Prior to the migration to digital broadcasting, the ownership of television stations in the region was dominated by a few large media groups with extensive networks. However, after the implementation of ASO, the question arises whether this ownership structure has undergone significant changes or has remained in the same pattern. This study will map television ownership in West Java by analyzing the changes that have occurred, both in terms of the number of new players, the distribution of ownership, and the level of diversity that has emerged in the digital broadcasting ecosystem.

The results of this mapping can serve as a basis for evaluating the effectiveness of the ASO policy in creating media ownership diversity and providing recommendations to policy makers to support a more inclusive and competitive broadcasting ecosystem.

2. Method

This research uses a qualitative approach. According to Creswell (2018) Qualitative research is a type of research that explores and understands the meaning of a number of individuals or a group of people who come from social problems. Qualitative research is used to obtain broader and deeper information about the topic of the problem in this study. In the qualitative research process, inductive thinking construction is used or from specific to general problems to be studied. In qualitative research, researchers start from the data obtained then use theory as a basis or explanation and create a theory. In quantitative research, researchers use theory to be able to present data and the output is whether or not a theory is accepted (Noor, 2012). This research also uses a case study approach. In this study, researchers used Robert E. Stake, a case study is a study of the specificity and complexity of a case, in the case study approach Stake explains that it is not important to understand many cases, one type of case is enough (Robert, 1995).

Data was collected through in-depth interviews with six informants from various television stations in West Java, both those networked with large media groups and those operating independently. Interviewees included representatives from Radar TV Tasik, SM TV, Bandung TV, MGS TV, BR TV, as well as the Chairman of the Indonesian Digital Broadcast Television Association (ATSDI). The selection of informants was purposive, where they were chosen based on their relevance to the research topic, direct involvement in the digital broadcasting industry, as well as their capacity to provide insights into the changing ownership structure of television after the Analog Switch-Off. This approach allowed the researcher to gain a more in-depth perspective on the dynamics of media ownership and the challenges faced by local television in the digital era.

This research also uses data validity techniques, the data validity used in this research are: (a) Source Triangulation, comparing information obtained from interviews with secondary data, such as policy documents and broadcasting industry reports, to see the consistency of findings. (b) Triangulation of Methods, using more than one data collection method (interviews, observations and document analysis) to gain a more comprehensive understanding of post-ASO media ownership concentration. (c) Member Checking - Confirming interview results with informants to ensure that the researcher's interpretation of the data matches their perspective (Bergin, 2018).

3. Result and Discussion

The relationship between actors in the broadcasting industry cannot be separated from social factors in the broadcasting industry, because in the broadcasting industry there are always actors

who control and are controlled. In Giddens (2010) concept of structuration, the existing social system would not exist without actors or agents who create it, but in this context it does not mean that actors create the social system, but actors change or reproduce the existing system by reorganizing the existing system. The end result of structuration is a series of social relations and organized power processes between class, gender, race, and social movements, each of which is interrelated with each other.

The relationship between actors in the broadcasting industry is very close, this relationship can be seen both before and after the implementation of Analog Switch Off in West Java in relation to media regulation and financing (Nurizar, 2020; Wamanji, 2022). The presence of a regulation is due to the relationship between actors who compromise with each other which will later form a network that is interconnected in the broadcasting industry, the relationship that is formed indirectly will also affect the direction of a media movement in terms of financing and media management (Ahokpossi, 2009; Hassan et al., 2019). According to Turow (2019) The study of the political economy of media tries to analyze when and how the economic structure of society and the media system depict the political interests of a group of rich and powerful people. In line with what was conveyed by Eris Munandar, General Chairperson of ATSDI:

"The relationship between actors in the broadcasting industry before and after the implementation of ASO has certainly experienced significant changes, in terms of television ownership, there have been quite significant changes in ownership, some have been acquired and some have acquired, of course this condition is related to the opening of opportunities through regulations for the television acquisition process, the acquisition process occurs because of the existence of supporting regulations and the aspect of media financing which is quite expensive".

Based on the information above, it can be seen that the relationship between actors before and after the implementation of Analog Switch Off in West Java in relation to media regulation and financing emphasizes more on the relationship between television ownership that has changed after before and after Analog Switch Off. According to Herlina (2019) a media cannot be separated from the intervention of various actors because there is a principle of interdependence between media institutions and economic and political institutions. So that media institutions can represent the political economy of a group of people. It can be identified the relationship between actors in the broadcasting industry before and after the implementation of Analog Switch Off in relation to media regulation and financing affecting television ownership networks in West Java, as can be seen in tables 1 and 2. The table will explain and provide understanding related to Media Group, Group Leader, Television Channel, and Status. The results and discussion are obtained from the results of interviews and research reviews that have been conducted.

Table 1. MAP OF TELEVISION OWNERSHIP IN WEST JAVA BEFORE ANALOG SWITCH OFF

Media Group	Group Leader	Television Channels	Status
SURYA CITRA MEDIA (COMPUTER CROWNED EAGLE)	EDDY KUSNADI SARIATMADJA	INDOS TV	-
ASIAN MEDIA VISION	ANINDYA NOVYAN BAKRIE	ANTV TVONE	
MNC MEDIA	HARY TANOESOEDIBJO	Radio MNCTV GTV NEWS TV	
TRANS MEDIA	CHAIRUL TANJUNG	TRANS TV TRANS 7 CNN CNBC	
MEDIA GROUP	SURYA PALOH	METRO TV	
CORPORATE EAGLE	PETER SONDAKH	RTV	
KOMPAS GROUP MEDIA	JAKOB OETAMA	KOMPAS TV	
MAHAKA GROUP	ERICK THOHIR	REPUBLIKA TV	
LIPPO GROUP	JAMES RIADY	NEWS ONE TV	CHANGE OF OWNERSHIP AND NAME TO BTV
BALI POST MEDIA GROUP	THE NARADHA SATRIA	BANDUNG TV	
JAWA POST GROUP	DAHLAN ISKAN	JAWA POST TV BANDUNG JAWA POST TV CIANJUR PJTV SMTV TVK TV RCTV TASIK TV RADAR	TVK & JATIWANGI TV CHANGE OWNERSHIP AND NAME TO GARUDA TV RCTV & RADAR TV TASIK CHANGE OWNERSHIP TO DISWAY NATIONAL NETWORK
NT CORP	NURDIN TAMPUBOLON	INDONESIA TV	
NET MEDIATAMA TELEVISION	AGUS LASMONO SUDIWIATMONO	NET TV	CHANGED NAME TO MD TV
INSPIRATION MEDIA	DENI TRIESNAHADI	INSPIRA TV	
MEDIA ACTIVITY	UNIDENTIFIED	AKTV E-CHANNEL	E CHANNEL CHANGES OWNERSHIP AND NAME TO SIN PO TV
MEGASWARA MEDIA	UNIDENTIFIED	MGS TV	
DAARUT TAUHID FOUNDATION	ABDULLAH GYMNASTIAR	MQTV	
RASE GROUP	YANA MULYANA	RASE TV	CHANGED OWNERSHIP AND NAME TO AJWA TV

SOURCE: RESEARCHER'S PROCESSING, 2025

Table 2. MAP OF TELEVISION OWNERSHIP IN WEST JAVA BEFORE ANALOG SWITCH OFF

Media Group	Group Leader	Television Channels	Status
ANNISA GROUP	ISMAIL	BADAR TV	CHANGED NAME TO BR TV
HDAS SABILULUNGAN ASSOCIATION	THE ONE WHO IS AKBAR	HDAS SABILULUNGAN	CHANGED NAME TO HDAS TV
INDEPENDENT	INDIVIDUAL	GARUDA TV JABAR TV NINE TV TV PK TV TASIKMALAYA MUNING TV TV SUBI TV CIREBON TV CITY TV INDONESIA PAR TV	SEMBILAN TV, PK TV TASIKMALAYA, KEMUNING TV, PERSADA TV. SUBI TV CHANGES OWNERSHIP AND NAME TO GARUDA TV CIREBON TV CHANGES OWNERSHIP AND NAME TO SIN PO TV JABAR TV CHANGED ITS NAME TO I CHANNEL CITY CHANGES OWNERSHIP AND NAME TO JAWA POS TV CIREBON PERSADA TV BANDUNG CHANGES OWNERSHIP AND NAME TO U TV GARUDA TV CHANGES ITS NAME TO GARUDA VISION TV

SOURCE: RESEARCHER'S PROCESSING, 2025

Table 3. MAP OF TELEVISION OWNERSHIP IN WEST JAVA BEFORE ANALOG SWITCH OFF

Media Group	Group Leader	Television Channels	Status
SURYA CITRA MEDIA (COMPUTER CROWNED EAGLE)	EDDY KUSNADI SARIATMADJA	INDOS TV MOJI TV SUN TV AJWA TV	-
ASIAN MEDIA VISION	ANINDYA NOVYAN BAKRIE	ANTV TVONE VTV	
MNC MEDIA	HARY TANOESOEDIBJO	Radio MNCTV GTV NEWS TV	
TRANS MEDIA	CHAIRUL TANJUNG	TRANS TV TRANS 7 CNN CNBC	
MEDIA GROUP	SURYA PALOH	METRO TV MAGNA CHANNEL BN CHANNEL	

SOURCE: RESEARCHER'S PROCESSING, 2025

Table 4. MAP OF TELEVISION OWNERSHIP IN WEST JAVA BEFORE ANALOG SWITCH OFF

CORPORATE EAGLE	PETER SONDAKH	RTV	
KOMPAS GROUP MEDIA	JAKOB OETAMA	KOMPAS TV	
MAHAKA GROUP	ERICK THOHIR	REPUBLIKA TV	
B UNIVERSE	ENGGARTIASTO LUKITA	BTV	
BALI POST MEDIA GROUP	THE NARADHA SATRIA	BANDUNG TV	
JAWA POST GROUP	AZRUL ANANDA	JAWA POST TV BANDUNG JAWA POST TV CIANJUR JAWA POST TV CIREBON PJTV SMTV	
DISWAY NATIONAL NETWORK	DAHLAN ISKAN	RCTV TASIK TV RADAR	
NT CORP	NURDIN TAMPUBOLON	NTV	
MD ENTERTAINMENT	MANOJ PUNJABI	MD TV	
INSPIRATION MEDIA	DENI TRIESNAHADI	INSPIRA TV	
MEDIA ACTIVITY	UNIDENTIFIED	AKTV TV	
MEGASWARA MEDIA	UNIDENTIFIED	MGS TV UGTV	UG TV IS A LPK THAT IS A BUSINESS UNIT OF MGS TV
DAARUT TAUHID FOUNDATION	ABDULLAH GYMNASTIAR	MQTV	
KICK ANDY FOUNDATION	ANDY FLORES NOYA	SMILE TV	
ANNISA GROUP	ISMAIL	BRTV	
HDAS SABILULUNGAN ASSOCIATION	THE ONE WHO IS AKBAR	HDAS TV	
PP MUHAMMADIDAH	DIN SYAMSUDDIN	MU TV	
UNICOM	EDDY SURYANTO SOEGOTO	UTV	
UNPAD		DIVIA TV	COMMUNITY BROADCASTING INSTITUTION
POWERFUL MEDIA OF THE ARCHIPELAGO	PRABOWO SUBIANTO	GARUDA TV	
SIN PO MEDIA		SINPO TV	
INDEPENDENT	INDIVIDUAL	PAR TV GARUDA VISION TV I CHANNEL STAR TV	

SOURCE: RESEARCHER'S PROCESSING, 2025

From the table above, it can be seen that the relationship between actors in the broadcasting industry before and after the implementation of Analog Switch Off in West Java experienced quite significant changes in terms of ownership, this happened because of regulations that provide space for entrepreneurs to change the ownership structure. Changes in the concentration of television ownership in West Java also occurred due to financing factors that no longer support production operations, so that televisions that had difficulty in financing had to be acquired by large media groups and changed their channel names.

Basically, it can be seen that the process of acquiring local television is very real, for West Java itself, many local televisions were acquired by a large newcomer media group, namely Digdaya Media Nusantara with the name of the Garuda TV channel, Garuda TV's efforts after the implementation of Analog Switch Off in order to reach all broadcast areas in West Java, Garuda TV must acquire televisions in the regions, this practice is certainly a real manifestation of television media conglomeration because there are political economic factors in the relationship between actors, with the practice of media conglomeration, it indirectly affects the diversity of broadcast content. Then for the networked television group after the implementation of Analog Switch Off to expand the business, they added channels.

After the implementation of Analog Switch Off, channels have increased so that ownership has also increased, but it cannot be denied that ownership dominance still occurs in large media such as EMTEK Group, MNC Group, Trans Media, Media Group, Visi Media Asia, dominance is further strengthened by large media groups receiving compensation for providing Multiplexing.

Concentration of Television Ownership after Analog Switch-Off

The findings in this study show that after the implementation of the Analog Switch-Off (ASO), television ownership in West Java is still dominated by large television networks such as EMTEK Group, MNC Media, Trans Media, Media Group, and Jawa Pos Group. Meanwhile, small-scale local television experiences various challenges in maintaining its existence, especially related to funding, technology, and access to digital infrastructure.

From the perspective of Structuration Theory Giddens (2010), this condition can be explained through the concepts of structuration and agency. Structure in this context refers to broadcasting regulations and the dominance of large media networks that have taken root in the television industry system. On the other hand, local television as agents have the capacity to take action, but limited resources make it difficult for them to compete with large media groups. In other words, although the ASO policy aims to create diversification of ownership, the current structure of the media industry still reinforces the monopoly of large groups (Oh & Kang, 2022; Rahayu et al., 2024).

Media Acquisition and Consolidation: Impact on Local Television

This research also found that post-ASO, there was a process of media acquisition and consolidation, where several local televisions were acquired by large media networks, either by changing their names or ownership structures. One concrete example is the emergence of Garuda TV, which is the result of the acquisition of several local televisions in West Java by a new media group. From the perspective of Structuration Theory, these changes show how large television networks act as agents capable of reproducing the structure of the broadcasting industry (Sjuchro et al., 2022; Zou, 2022). They use economic, technological and regulatory resources to maintain dominance in the digital broadcasting ecosystem. Meanwhile, local television networks that do not have the same capacity experience economic and regulatory pressures that make it difficult for them to survive (Kim, 2022; Ugochukwu & John, 2024).

Implications for Media Diversity and Broadcast Democratization

The main objective of the ASO policy is to create diversity in broadcast ownership and content. However, the results of this study show that media conglomerations remain dominant, resulting in limited content diversity (Meyers, 2011). This contradicts the principle of democratization of broadcasting mandated in Broadcasting Law No. 32 of 2002, which emphasizes the importance of public access to various sources of information. In the context of structuration theory, this reflects structural dualism - where new policies such as ASO are supposed to give opportunities to small actors (local television), but in practice large actors continue to control the system because they have access to key resources such as frequencies, funding and regulation. This reinforces Mosco (2009) argument in *The Political Economy of Communication* that media ownership concentrated in a few elite groups can create inequality in access to information and inhibit diversity of opinion in the public sphere.

4. Conclusion

The relationship between actors in television ownership in West Java has changed significantly after the implementation of Analog Switch Off. The main change occurred in the concentration of television ownership that occurred due to regulations that provided opportunities for the acquisition process. The high financing factor became a driving force for broadcasting industry actors to make acquisitions, so that television channels that were previously owned by individuals or small groups merged or were acquired by large media groups. Thus, there was a change in the ownership structure and names of television channels in West Java.

By referring to Structuration Theory, this study shows that changes in the ownership structure of television in West Java after ASO are more towards the consolidation of large networks rather than diversification of ownership. Although the ASO policy provides opportunities for local television to develop in the digital ecosystem, in reality, limited resources and the dominance of

large media have marginalized local television. Therefore, stronger regulations are needed to ensure that the goal of democratization of broadcasting can actually be realized in practice.

The concentration of ownership after the implementation of Analog Switch Off in West Java is still dominated by television with large groups, such as EMTEK Group, MNC Group, Trans Media, Media Group, Visi Media Asia and Jawa Pos Group and its affiliate Diswa National Network, therefore it is necessary to create new regulations or revise existing regulations which clearly regulate the media acquisition process to ensure a healthy broadcasting ecosystem and prevent excessive concentration of ownership by a handful of large media groups.

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