



INTERNEWS

Indonesian Broadcast Media in the Post-Suharto Period

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EXECUTIVE SUMMARY

This report is intended as a guide for Indonesian and international media and relief professionals in developing plans for assistance to the Indonesian electronic media industry. It is the result of an assessment survey conducted by Internews Network during August 1998, which was funded by USAID/OTI.

Internews investigators spoke with hundreds of respondents in eleven cities on five islands. The survey locations were chosen because they are major population centers and offer a reasonable cross-section of Indonesia's geographic and ethnic diversity. We focused on the current status of television, radio, and the Internet, with particular attention paid to independent (non-governmental) broadcasters. The issues of media content (particularly news programming), audience access, technological infrastructure and the legal status of media were examined.

During the years of the Suharto regime, Indonesia's electronic media were permitted little leeway in determining their programming content. News was restricted to only that provided by the State. Local news programming was nonexistent. However, since Suharto's resignation in May 1998 there has been an explosion in the freedom with which the electronic media may cover current events. As a result, in spite of the severe economic crisis which began in the summer of 1997, many private radio stations have begun to broadcast local news. Several of the country's five national private TV networks also present news programs. There are no private local TV stations in the country. Indonesians currently get their local news from newspapers and, increasingly, radio stations.

Although recently credited with a crucial role in the events leading to Suharto's resignation, the Internet is not widely accessed in Indonesia. Few service providers exist, few people own computers, and fewer still are aware of the potential value of the Internet as a medium for communication.

RECOMMENDATIONS

We firmly believe that, from the perspective of democracy in action, the most important kind of news is local. Without being able to know what is happening locally, citizens have no means to effect the local control from which democracy must emanate. As a result, we concentrated our assessment and our recommendations on what can be done to increase the quality and quantity of local news and how to strengthen local media.

Reasonably high-quality local daily newspapers exist in most or all of the fifteen or so major cities in the country (those with populations over 500,000). But outside of Jakarta, most newspapers have a circulation of, at most, 60,000, this means that a substantial portion of the population in a city with a population of over one million is not reading a newspaper, in part because they cannot afford to buy it. They therefore must get their local news from local radio. Most local radio stations find that providing any news other than that which they read from the local newspaper requires more resources than they are prepared to commit. But in any major city there are one or two of the five to thirty private radio stations that have already demonstrated their dedication to news. It is to these stations we recommend assistance be targeted.

The capital, Jakarta, is nearly ten times the size of any other city in the country and commands a corresponding proportion of the nation's resources. While any assistance projects must almost by definition be based in Jakarta as the communications hub, we would advocate targeting radio stations outside of the capital. Compared to stations in Jakarta, they are much less able to muster the resources needed for news programming themselves, and it is in the regional cities that the population is most lacking in reliable news sources.

Another reason that helped convince us the local private broadcasters provide the best opportunity to increase the news available to the population is quite simply the receptiveness of those we propose to assist. The national TV networks may find themselves in economic straits, yet they still possess resources that dwarf those any assistance project could bring to the table, and therefore the degree to which such assistance could sway them from their existing course is slight. Moreover, despite the apparent retreat of Suharto and his family from the public eye, the national broadcasters all remain firmly in the control of the old power structures. On the other hand, local private broadcasters (as yet only radio) evinced a profound desire to learn and progress, and the resources an assistance provider could bring to bear would correspondingly have considerably greater per-unit results.

We have grouped our recommendation into eight broad areas in order of importance:

The local private stations need equipment. Primarily, the needs lie in the area of editing and field recording. Political changes mean that for the first time in history, private radio stations can pursue investigative journalism, but because of the precipitous drop in the value of the rupiah to the dollar, stations simply cannot afford to buy anything that comes with a dollar price tag. Field recording equipment could be analog or digital, although digital has many advantages, current iterations of DAT and MiniDisc technologies may not be reliable enough for the heat and humidity which is a fact of life in Indonesia, and we therefore propose analog field recorders along with high-quality microphones for most recipients. (Also, there are few facilities in Indonesia to repair digital equipment.) As for editing, it is clear that computer-based equipment is superior and thus is to be preferred over analog. The more equipment provided to a station, the more news it will be able to produce, within limits, of course. Computers can also be used to help production of programming and ads, for Internet access, and for office automation tasks such as financial planning.

In addition, many stations do not have the small and relatively inexpensive technology that would allow them to easily and with little loss of quality patch telephone callers through to the live air. This capability is important both for live reports from the field as well as for talk shows, which are a staple of radio in Indonesia and which is perceived as responding to people's needs.

All equipment would be provided to stations on the basis of open competitions designed to reward the stations that prove the greatest dedication to production and broadcast of balanced investigative news. The competitions would also strive to maximize effect by ensuring a distribution among the cities with numerical, political, and geographic importance.

Training is needed. Because radio stations were not allowed to produce news until recently, there are very few radio journalists in the country. Radio reporting can be taught in short practical seminars with at most a dozen students in a class. There is also a need for longer-format radio program production, a skill which is practically absent in Indonesia. It was clear to us, also, that there are sources of advertising income which are not being tapped. Training in ad production and sales could help news stations become more viable and thus encourage more news programming. Although some stations have attended management seminars, we also found room for improvement in this sector. It is likely that new media legislation will allow foreign investment in media, but regardless, to attract investment, station managers need to know the basics of business plans and strategic planning.

There is a real opportunity to get public-interest radio programming on the air. In an intensely developed market economy, stations tend to broadcast only what garners an audience they can sell to advertisers. But Indonesia's radio stations are in

due economic straits and are desperate for any programming they can find that will differentiate them from other stations. Indonesia's listeners are hungry for information that will help them understand the forces that have so suddenly changed their lives and the issues that shape current realities. Production and syndication of programming on real-life topics such as student gender or ethnic issues, the role of the military in society, and corruption will find a receptive audience that will support the stations that have shown an interest in a current-events-focused format.

Stations need improved communication capabilities and information. If all the news-oriented stations in the country were on the Internet, they would have instant access to a number of news sources, domestic and international. Less dramatic but no less important, the establishment of a list server with specialized lists for groups of stations with common interests would help station staff share information. Services such as web hosting would help stations attract advertisers. And a computer/Internet advisor/problem-solver could help stations in relatively less-developed regions better approach the cutting edge of technology use.

The establishment of strong domestic advocacy groups for the private media will help ensure the federal government does not begin to backslide on its commitment to freedom of the press. The Alliance of Independent Journalists (AJI), the Association of Indonesian National Private Radio Broadcasters (PRSSNI) and its print organ Eksposen, the Institute for the Study of the Free Flow of Information (ISAI), and similar associations need support, since membership fees have dropped off precipitously and government subsidies have dried up. AJI and PRSSNI in particular have aggressively pursued the rights of journalists and radio station owners in pushing for new legislation that would secure the rights of the media to provide information to the population. Quite simply, these organizations need operating funds. AJI has very well organized branches in Jakarta and Yogyakarta which have well-thought-out proposals in need of funding. Eksposen is in danger of collapse since radio stations can no longer afford to pay for it.

The country needs new media-related legislation. ISAI, AJI, PRSSNI, and others are working hard on this. But there is a wide world of experience in this field to which they do not have access. Providing advice from specialists from developed countries, as well as from countries that have already undergone some of the transition to more-free societies (such as the former communist bloc) can have a wide impact. But such assistance must be undertaken carefully so as not to be rejected as foreign meddling—preferably channeled through domestic advocacy groups.

Universities need help connecting to the Internet. In our examination of the Internet system, we were at once surprised to find that educational institutions have been in the forefront of creating a wired world in Indonesia, yet, as a whole, universities have very low bandwidth. Here, too, government subsidies have dried up. Only about 50 of the country's 1300 or so higher education institutions have Internet connectivity. Simply providing an additional 64-Kbps of bandwidth to universities which already have a small connection serving thousands of students, or providing a 64-Kbps channel to the Internet for institutions which have no connection at all, can have a dramatic effect in terms of providing support for education and for student activism. Such assistance could be tied to universities' providing Internet connectivity to other key institutions such as media and NGOs. Aid should be provided on a competitive, cost-sharing basis.

National TV networks would be happy to broadcast civil society-oriented programs, particularly now because they are short of cash to purchase programming. Productions that are high in informational or educational content, whether domestically produced or acquired from elsewhere, would be welcomed and would instantly gain national distribution. This applies too to PSAs, which would be most likely to be effective if domestically produced, perhaps through a competitive grant.

process to local production houses. Although far from all households have TVs, the great majority of the urban educated do.

METHODOLOGY

Internews staff conducted the assessment by visiting eleven cities across the country: Jakarta, Yogyakarta (hereafter *Yogya*), Bandung, and Surabaya, on Java; Palembang, Medan, and Banda Aceh on Sumatra; Ujung Pandang and Manado on Sulawesi; Banjarmasin, on Kalimantan; and Jayapura on Irian Jaya. We chose these cities for the following reasons: they are among the country's most vibrant, they span a range of population sizes from twenty million down to one-quarter million, and they provide a cross-section of Indonesia's geographic, economic, and ethnic diversity. The researchers met with over 450 representatives of over 150 organizations in the media, government, business, NGO, and educational sectors.

The assessment team included two Internewsers who have considerable experience working with media in transitional countries and a third who has spent twenty years championing socially progressive causes in the US. The team spent a collective twelve weeks in Indonesia.

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In addition, Anthony Garet, agaret@internews.org, joined the assessment mission for part of its travels. He manages Internews' Washington, D.C. office.

In order to keep this report manageably concise, much of the data gathered during the assessment has not been included in this document. For further information about any aspect of Indonesian mass media, particularly broadcast media, please contact the authors.

We spell names and places according to current usage in Indonesia, with the exception of Java (*Jawa*), Sumatra (*Sumatera*), and Suharto (*Soeharto*), which have widely accepted existing English spellings.

[REPORT CONTINUES ON NEXT PAGE]

INTRODUCTION

The rapidity of change in Indonesia's political and economic environment has opened a window of opportunity to encourage and strengthen the media sector's freedom and capacity to inform. The chaos that has ensued since Suharto relinquished his position as President has provided the possibility and the impetus for an active and eager media to provide information to the citizenry. Radio and television, and to a lesser extent the Internet, have played a critical role in providing information quickly to citizens during and since the unrest of May 1998. And in the post-Suharto era, they have also become vital voices in the on-going dialogue about Indonesia's future.

Ironically, the media are unable to fully utilize their newfound freedom. The economic collapse which preceded and in many ways caused the political change in Indonesia has hit the media hard and has severely constrained the current generation of journalists, since they lack the resources to pursue and report "hard" news.

For the last three decades, a sophisticated print media establishment has carried the banner for the freedoms of expression, speech, association, and plurality in Indonesia. During the recent economic tribulations newspaper readers have remained relatively loyal. However, in the same way that most have been surprised by the recent upheavals in Indonesia, so have observers been surprised by the surging growth in broadcast media popularity over the recent months. Although the five national television stations stagger under the weight of huge economic losses, the cost of newsprint has increased fivefold, and the advertising market has collapsed, we feel it would be wrong to conclude that the Indonesian media market is in imminent danger of collapse.

The appetite of Indonesian citizenry for news and information has dramatically increased during two critical junctures in that country's most recent history. The financial collapse which began in mid-1997 and the social unrest beginning in the spring of 1998, culminating with street violence and protests which forced then-President Suharto to step down in May after more than thirty-two years of authoritarian rule, have stoked the population's hunger for information about current events.

The most prevalent and cheapest form of information comes to Indonesians via five terrestrial-broadcast television stations and over 750 radio stations. Although readership of printed media has increased across the country, despite an increase in newspaper price accompanied by a decrease in number of pages, the circulation of newspapers and weeklies is very small when compared to television and radio penetration. Rural and regional populations rely heavily on broadcasting for information. Television and radio also bridge the gap between the literate and illiterate. Approximately twenty percent of Indonesia's adult population does not read.

It is difficult to discern exactly how much the appetite for information has grown. There is no uniform regular information acquisition on the part of the five national television stations, and the target audiences and radio stations measured across Indonesia are thin by any audience measurement standard.

In addition, a chaotic transition in Indonesia's media, particularly in the realm of news and current-affairs production, seems to have blind-sided all media-measuring organizations, including those sponsored by government-sanctioned associations such as the National Advertiser's Association. This is most clearly evidenced by the fact that such surveys still fail to ask what kind of programming audiences tune in to. Internews researchers found no information that related specifically to news and/or current-affairs programming. The state-sponsored audience-measurement efforts are produced annually and thus do not yet reflect any of the dramatic changes that have

recently occurred in Indonesia's broadcast media environment

THE MEDIA

Television

There are seventeen million TV households in Indonesia. In the major urban centers, about 85 percent of households own a TV. Some 30 percent of the population live out of the range of terrestrial TV signals. In that 30 percent, a significant proportion of the population can watch TV with the help of a satellite dish and tuner which together cost under \$200. In the less-urban environment, a number of families may share a single television set. Watching television becomes an occasion for social gathering that can draw large numbers of families and individuals together. In Sentani, for example, on the outskirts of Jayapura, we saw 30 people in a home—family and friends—watching a talk show on RCTI, the largest commercial television station. It was, they said, a nightly practice.

The country's state-run broadcaster, TVRI, reaches 37 percent of the country's territory (68 percent of the population) through a web of 320 local transmitters. TVRI is a true network, with affiliates in 20 of the country's 27 regional capitals. Each affiliate fills several hours per day with locally produced programming, including local news. TVRI produces several full-fledged national news programs per day, and simultaneous carriage of TVRI's news bulletins by all TV transmitters in the country (including on all the private stations) is mandatory. TVRI's newsgathering capabilities are by far the country's largest. But the tight political control exercised over the central broadcaster as well as over local affiliates means this channel fares poorly in ratings. Its news programs are considered relatively one-sided and incomplete at best, misinforming (or disinforming) at worst.

TVRI is not allowed to accept advertising. The network is funded by a 12.5-percent tax on gross advertising revenue of the private TV broadcasters. This apparently worked well until the 1997 economic crisis hit and the private broadcasters are now complaining mightily about the burden, and not paying, they are advocating that the tax be lifted and TVRI be forced to pay its own way.

Private TV broadcasters first began to appear in the late 1980s. At that time, a decision was made on the federal level that private broadcasting should be based only in Jakarta (the better to ensure control over the airwaves). All private broadcasters were strongly encouraged to "go national" and were issued licenses for local retransmission nationwide. Thus, ANteve, which had been based in Lampung, and SCTV, which had been based in Surabaya, moved to Jakarta, and permission for three more networks was granted, bringing the total to today's five private national networks. One of them, TPI, was conceived of as an educational network (and indeed its full name is "Educational Television of Indonesia"), but is now less commercial than the other four private networks.

Of the private networks, RCTI is the best funded and by far the most popular, with a market share of, on the average, about 25 percent, and with the widest coverage (over 35 cities). SCTV is popular as well and has a reputation for providing the hardest news. ANteve, Indosiar, and TPI have a smaller market share and also a smaller number of local retransmitters. ANteve has targeted the younger generation and devotes much of its airtime to an agreement to rebroadcast MTV. RCTI and SCTV have daily national news programs and have local correspondents in most of the regional capitals, TPI also has some regional correspondents for its news-type programs. All the private networks have only very limited terrestrial coverage, usually in only ten to thirty of the country's major cities. Outside the major cities, viewers must either have a satellite dish or limit themselves to TVRI.

In addition to the ad tax, private broadcasters must also pay high rates for their licenses to the Department of Tourism, Post, and Telecommunications, reportedly on the level of hundreds of thousands of dollars per retransmitter

The broadcasting legislation approved in September 1997 makes it possible for new local private TV stations to apply for a local license. But because of the "krismon" (monetary crisis) that had hit the country several months before, investors have not jumped at the chance. There are reports that independent groups in Semarang and in Yogya, both named SMTV, have applied for and received licenses but have not moved forward with broadcasting for economic reasons. Our suggestions that private local TV would be lucrative were met with derision, but we have heard, after our trip, that some of those with whom we spoke have begun discussing the idea with investors and regulators.

TVRI, RRI (state radio), and the five private TV networks feed their signals to local retransmitters by satellite. Local retransmission stations are usually owned and operated by the national network, so it is not unusual to find, on the tallest hill in town, a profusion of towers, one for each of the broadcasters, and each staffed with a couple of engineers to make sure everything continues running. In the larger cities, the transmitters are fully redundant. Occasionally they will team up to share a tower, this is particularly true of SCTV and RCTI, which share several owners.

News

All the private networks are controlled by powerful corporations in which ownership is vested among relatives and close friends of former President Suharto. As a result, the accuracy of the news that TV provided has always been considered suspect at best. Since Suharto's resignation, the private broadcasters have rushed to distance themselves from the "keluarga cendana" (indicating the Suharto's "royal family") and their news is now more balanced. The airwaves are now filled with talk shows and news programming that tackles the issues of the day in a more cogent and representative manner. The challenges for television continue to lie in its lack of any real regional presence, the lack of an advertising base large enough to support six national networks (the five private ones plus the state-run one), and the lack of trained and skilled journalists and producers.

All of the Jakarta-based networks use Betacam SP for their day-to-day feature production, but all (including TVRI) use S-VHS for shooting news outside of Jakarta, and many use VHS. Many were planning to switch to digital production when the economic crisis hit, and as a result have either postponed their plans or have found themselves partially-converted but without the financial resources to continue execution of their modernization plan.

Whether in the largest cities of Jakarta or in the small villages around Jayapura, television is a significant source of international and national information. The TVRI bulletins are generally not considered reliable with respect to national news, but watching them is considered important since they provide the official point of view on current events. The several non-state channels with news programs broadcast their own news bulletins before or after the TVRI slot, all make efforts at coverage of international events, but without correspondents of their own, international news is rather generic.

The commercial stations are increasingly showing programs that provide a venue for lively, balanced, and often critical debate of current events and the government's policies. For example, the existence of mass gravesites in northern Sumatra and the civil riots that followed their discovery were reported extensively in the broadcast media while we were there. Shooting and editing on both TVRI and the private

stations' news programs displays a good basic knowledge of TV news production standards, although it remains far below international standards. Unsurprisingly, the private stations' news programs tend to be faster-paced than TVRI's, and they tend to do a better job of reflecting the controversy surrounding many current events. Still, TV news programs generally lack depth, and investigative reporting is virtually non-existent.

Talk show programming is still the most revealing and controversial of all the television information sources available. Contentious discussions are often printed in the daily newspapers as news stories on the morning following their broadcast. It is common for radio stations to re-discuss the issues presented on TV talk shows of the night before—e.g. Wimar Witoelar's "Perspektif" is often discussed on commercial news-oriented radio in Jakarta.

However, self-censorship remains. There is little truly investigative news programming in the nightly news bulletins. Although TV is much more aggressive about reporting on issues of so-called KKN (corruption, collusion, and nepotism), names of involved parties are rarely mentioned for fear of reprisals. A senior television journalist told us, "Religion can be discussed in very general terms but we could not for example discuss tensions between religious groups or a crime that has been committed in the name of one faith or another." Regulations still severely restrict coverage of issues that fall under the relatively large umbrella of SARA, an acronym denoting the Indonesian words for ethnicity, religion, race, and inter-group issues.

Other programming sources for TV

The economic crisis has hit TV hard. Advertising is much harder to come by than several years ago. Prices for international-quality programming—relatively high even when TV was a relatively profitable business before the current recession—are now unaffordable. We learned that most of the networks are re-running programs they had purchased earlier, not always with corresponding broadcast rights. The quality of the imported programs has decreased dramatically and in some cases it seems clear that networks are scraping the bottom of the barrel.

The broadcast law requires that 70 percent of the programming be domestic, but few networks meet this standard. The law also prohibits broadcasting in any language other than Indonesian or English and requires that imported programs must be in English. This results in peculiar situations where, for instance, Mexican soap operas or Indian movies are versioned into English, then subtitled into Indonesian. None of our informants could explain to us the reasoning behind this system. Regardless, even though production costs in Indonesia are very low right now if measured in dollars, stations still tend to find it cheaper to acquire even low-quality foreign programming than to produce their own programs.

Stations are hard up for programming, but TV is still tremendously popular all across the country. While national TV is not an appropriate venue for local news, it is still a very effective way to deliver a message to the population. Programs which are interesting but also educational could be very effective in reaching large audiences. Our preliminary discussions with private networks indicated they would be very interested in broadcasting public-interest/educational programming, not least because their license terms require a certain proportion of public-interest-type programs, a ratio they have difficulty sustaining.

We recommend funding the production of programs that would address, in an entertaining way, some of the issues with which Indonesians are suddenly faced as their government endures the transition from an autocracy to a democracy. Many of

these issues are highlighted by economic tensions that exacerbate existing and long-submerged divisions based on ethnicity, language, religion, and geography. We have seen similar processes in many of the former Soviet states and in Yugoslavia. Our spacebridges in several countries have helped viewers understand the nature of conflict and how to defuse it, and our television program "What If?" showed Russian citizens how to use their rights as consumers to defend themselves against blatantly unjust actions on the part of business or government.

Satellite TV

Satellite use in the media is important as a separate topic. Not only is it a delivery mechanism which plays a key role in how Indonesians get information (and in breaking the government monopoly on information), it is also likely that its role will only increase given the geographical difficulties inherent in linking over 13,000 islands to each other and to the capital, where most central media are based. And given the relatively high penetration of satellite reception equipment among the moneyed class, it is not inconceivable that new broadcasters may begin distributing exclusively by satellite.

Indonesia was a pioneer in using satellites for distribution of TV signals. The first Palapa satellite went up in 1976, and others have followed at regular intervals. When the new private stations went on the air by satellite in the late 1980s, Indonesians scurried to buy satellite dishes, since the private networks had not yet developed a network of local retransmitters. All of the country's cities became festooned with thousands of large (3.5 m or more) dishes. Now, however, most major urban areas have retransmitters for all the country's six national networks, and the dishes are not used much, with many of them falling into disrepair.

Statistics from Survey Research Indonesia (SRI, described in more detail under 'Audience Research' below) show that the average penetration of satellite parabolas in large Indonesian cities is about two percent. But in Padang, a large city in Sumatra, it's about 26 percent, a figure explained by the late and still incomplete deployment of retransmitters by the private networks, thus requiring dish ownership to receive the full spectrum of six Indonesian channels available by ordinary terrestrial broadcasting in other cities.

Dishes are still necessary in order to receive foreign programs. Malaysian TV is occasionally cited as one channel worth watching, since the Malaysian and Indonesian languages are mutually intelligible. CNN is also of interest, but most Indonesians cannot speak English, so its appeal is limited to a relatively small circle.

Beginning in the early 1990s, the holding company Datakom Asia (partly owned by Indosat) rolled out a direct-to-home satellite service known as Indovision. Indovision delivers the six domestic TV channels plus a dozen or so foreign ones by conventional C-band using digital compression. It would appear, however, that the service's owners are over-compressing the signal (most likely trying to fit too many channels onto one satellite transponder), because in many places the signal we saw would distractingly pixelate relatively often.

In early 1998 Indovision was to migrate to a new five-transponder satellite known as Cakrawarta, one of the first DTH birds in the world to use S-band. Cakrawarta was launched by Indostar, the state satellite operator's competitor (and part of Peter Gontha's media empire). The roll-out has been star-crossed. According to rumors, the satellite is operating at less than full power due to a technical malfunction. And the economic crisis hit just before the reception kits were to arrive in stores. There are no more than 20,000 subscribers as yet. The small parabolic antennas and decoders are not generally available. The service is too expensive for most subscribers to afford.

Finally, because of financial difficulties, few of Indovision's planned several dozen Indonesian-language channels have yet materialized

Some of the country's cities have satellite transmitters used predominantly for data transmission. Local news bureaus of the central TV reported that they usually send their video to Jakarta via cassettes on planes, but if they have an emergency, they will send via satellite, although that costs considerably more and is therefore avoided

Radio

RRI reaches 67 percent of the country's territory (80 percent of the population). Each of the country's 27 regions has its own radio channel as well. There is also a state-run radio channel produced for foreign consumption.

Local private radio stations appeared shortly after Suharto came to power in 1966 and were viewed as a legitimate form of entertainment. Even so, radio was considered a hobby until the mid-1980s, when the government moved to license it. At that time, with the advent of advertising, radio stations began to carefully target particular market segments. Official sources now report the existence of 769 private radio stations in the country. There are no national radio networks, but the 1990s have seen the appearance of a handful of Jakarta media enterprises which have bought radio stations in five to fifteen other cities, the better to sell advertising and exchange information.

The vast majority of radio stations follow an all-music format. The market is fairly segmented, with each station identifying itself as targeting a certain age group with a certain kind of music. Broadly, stations can be divided into two groups: those playing the so-called dangdut, a type of Indonesian pop music that is popular among the poorer segments of the population, and those playing generic Western pop music.

Statistics point to an enormous increase in radio listenership over the past several years in the largest regional urban centers in Indonesia. Anecdotal evidence from the stations themselves confirms this. Station managers report that audiences have grown, due in part to the turbulent events of the last eighteen months and partly because newspapers have become less accessible due to their increased price and the decreased purchasing power of the population at large.

Most stations reported that advertising revenues have decreased since the economic crisis began. But while some stations report small but bearable drops, others report losses of as much as seventy percent. Based on what the stations reported, the biggest factor influencing this variance in ad revenue loss is the degree to which a radio station is able to execute a well-thought-out strategy of aggressively attracting advertisers.

Many stations have entered into ad-sharing agreements with newspapers. Radio stations believe they could broadcast up to about ten spots per hour but because they currently sell much less, they hope that they can hook more revenue by selling the advertiser on the idea that the ad will run in the paper too.

The ad market in Jakarta is highly refined, but outside of the capital it is relatively primitive. In large cities, for instance, there are usually only a couple of advertising agencies that can put together a buying plan for a corporate client. Relatively few broadcasters understand the benefit of providing an agency a discount in order to reap the benefits of an agency's willingness to steer clients in their direction. Smaller cities tend to lack agencies at all. And because radio stations' ad departments are not as well developed as they should be, the agencies usually concentrated on print advertising. We estimate that a regional radio station's gross receipts are between \$100 and \$1000.

per month

Based on our successful experience in over a dozen other countries in transition, we recommend training for managers and ad executives of private radio broadcasters (and in particular targeting those which produce local news), to help them weather the economic crisis. The ad market is not large enough to support the number of radio stations currently operating, and judiciously-provided assistance in the field of management and advertising to those broadcasters demonstrating dedication to unbiased news and public-interest programming would help ensure their survival.

News

As in TV, private radio stations were until recently officially forbidden from producing their own news programs. They did, of course, provide what they disingenuously called "information," but there was no question of journalistic investigation or broadcast of anything that might be construed as critical of any of the official structures. And since most large firms operated under the patronage of someone official, not much was left to cover.

Private radio stations were required by a 1971 edict to carry thirteen on-the-hour five-to-fifteen-minute news bulletins produced by RRI in Jakarta, plus one official local bulletin daily, plus any special broadcasts such as presidential speeches. A revolutionary 5 June 1998 edict, number 134/SK/MENPEN/1998, reduced this number to a total of four mandatory daily news broadcasts (at 06 00, 13 00, and 19 00 Jakarta time, plus the local one, generally at 16 00 local time). Private stations, feeling the winds of freedom, have objected to even that, in some places they have unilaterally capped the length of the RRI news bulletin they will carry at e.g. ten minutes, and in some places they have even refused to carry them at all—apparently so far with impunity. As far as they are concerned, the state news bulletins cause them to lose listeners at that point. This is confirmed, for example, by the counter-programming practiced by student radio in Yogya, which puts its news programs on exactly at the same time that the commercial radio stations have to play the state bulletin. They know that's when their listenership will be highest because most listeners of other stations are looking for an alternative to government news.

The June 1998 edict also for the first time permitted private radio stations to broadcast news, use a local dialect provided the announcer "refers" to Indonesian (cleverly drafted to not allow the use of e.g. Chinese), and to rebroadcast foreign news (BBC, VOA, etc.) without the explicit permission of a DepInfo Dirjen.

With the newfound permissiveness beginning in 1998, in each of the 30 or so largest markets one to four radio stations have staked out the "news market" and are making genuine attempts to provide local investigative reporting. But almost insurmountable barriers hamper them, the two largest are the lack of reporting skills and the lack of reporting equipment.

Radio stations that want to produce news need encouragement because there is little doubt that, all other things being equal, continuing with the older all-music format is the easier and more-profitable path. It requires fewer staff. It requires less equipment. As we have noted in our extensive work with broadcast audiences worldwide, although people are interested in current events, entertainment programming tends to draw larger audiences than informational programming. Yet news can be profitable if properly produced so as to make it something other than a newspaper read aloud, which is what most radio news in the country now is.

Although news stations now have one to ten reporters combing the streets for newsworthy events, the reporters usually have little or no journalism background,

until recently, it was useless for a private radio station employee to know anything about news. Now, up to 100 stations have a cadre of staff producing news with no experience in their profession. Some do have some journalism background—but in the print media, and the presentation of news on radio stations reflects the tendency to echo newspaper-style reporting, which is inappropriate for the radio.

We recommend a crash course for these staff to enable them to research stories, acquire material, and produce packages in a balanced, informative, and interesting manner. By this we do not mean a lecture room crammed with 100 reporters. Teaching good news requires intensely practical work with substantial amounts of equipment, experienced trainers, and hands-on interaction with the trainees. In our experience with radio journalism training in a number of countries elsewhere in the world, seminars of seven to ten days provide optimal interaction.

In the entire country we saw not a single field reporter's recording deck, whether old technology or new, radio reporters either don't record in the field, or they use consumer-grade portable tape player/recorders which do not provide high-enough quality sound to be used later in editing a news story. A field reporter's package costs well under \$1000, but because stations' freedom to produce field news appeared only since the economic crisis began, the drop in ad revenues and the punishing exchange rate have meant it is impossible for stations to acquire such equipment.

Other programming sources for radio

Stations willing to deviate from the tried-and-true music formats are also experimenting with talk radio. With lively and interesting guests, with high-quality patching of callers into the show, and topics which are of interest to a broad-enough segment of listeners, talk shows have proved a runaway success in Jakarta and a few other cities when done right. While talk shows originated in the Suharto era, when they provided an opportunity to skirt the official restrictions on news programming, they have lost none of their glamour. On-air interviews with important people are interesting, but talk shows provide the opportunity for callers to provide live questioning. However, most stations we visited lacked the specialized equipment, called a hybrid telephone, to make it possible to put a caller on the air. Many had jury-rigged their own, but the resulting on-air quality leaves much to be desired. Thus, cheap but high-quality hybrid telephone patch boards would help make talk radio easier and more attractive to stations pursuing non-music formats, and we recommend including hybrid telephones be considered as equipment grants.

We found that many of the foreign-language services of Western countries' state broadcasters provide some programming in Indonesian, and many of the private radio stations use these materials gratefully. VOA reports that 70 stations use its daily half-hour feed. The BBC sends out a cassette with features on a monthly basis. Deutsche Welle has also sent out materials regularly, and some stations noted that one of the most useful aspects of DW's contributions is that they can keep and use the international music, royalty-free, for many years afterwards. We were told that the Australian Broadcasting Corporation and Hilversum (Holland's foreign broadcaster) delivered Indonesian-language programs as well, but no station we visited rebroadcasts them, so it is possible these services have been discontinued. Radio Mara, however, reported that ABC phones them once a week for a live fifteen-minute dialogue.

Like most foreign broadcasters, the BBC has a feed in Indonesian that it delivers by shortwave and by satellite—a total of over two hours daily. But although the BBC does allow rebroadcast of its daily news service on local stations, unlike the VOA they have not been aggressive about seeking local partners. But their reticence is understandable—a provision on the books from many years ago prohibits Indonesian

media from receiving assistance from abroad. While this rule is not being presently enforced, it is an example of the many levers the government retains to ensure that the content of the airwaves can be controlled if necessary. None of the foreign broadcasters charges a fee for the right to rebroadcast their programming.

With very few exceptions, there appears to be almost no national syndication of domestic radio programs. In the early 1980s, Yayasan Sanggar Prathivi (YSP) began syndicating programs that would encourage morally upstanding behavior and received substantial support from some European religious foundations, but in the 1990s as the private radio stations became more commercial, the company was outdistanced by popular taste. Today few stations buy YSP's programs, and they have cut their staff from 150 to 10. One of their more successful projects, and one that continues today, is recording serialized radio dramas, but even this has gone from 200 paying subscribers to 30 non-paying ones. Debra Yatim, an NGO activist in Jakarta, is using a Ford Foundation grant to produce a weekly half-hour show that provides a structure of ethnic music to which a local station may fit local content. Several stations indicated that this innovative approach worked well for them.

Every station we visited indicated they would be very interested in syndicated current-events or educational programs, and this interest is borne out by the number of stations rebroadcasting materials from BBC, VOA, and others. We therefore recommend the creation of a low-cost radio production center in Jakarta, possibly in cooperation with YSP, to deliver a series of regular syndicated radio programs on current events. A production center in the capital could integrate into its programs people and institutions to which a regional radio station cannot hope to have access. It would have to experiment with new forms of presentation (as Debra Yatim has done) to make the programs accessible and interesting to a wide range of viewers. But the lack of such programming to date indicates that the starting point is rather low and it should not be difficult to do.

Programming about gender issues could be of particular interest because audience research tends to show women listen to the radio more than men. One of our interviewees said he believed this is because men usually have jobs whereas women tend to care for the children and are therefore more likely to be at home and have the radio on to keep them company.

Such a center should initially deliver its programs via express-mailed cassettes (two days for delivery anywhere the country, as opposed to seven or more using the normal post). But it could be quite cost-effective to establish a satellite-based delivery mechanism using e.g. the Cakrawarta digital platform, possibly sharing costs with others such as the BBC.

Newspapers

We did not include print media in the scope of our survey, but a few words are in order. The newspaper business is alive and well, if slightly set back by the economic crisis. Most large cities have several dailies with circulations of 20,000 to 60,000 and with a large team of aggressive reporters. Newspaper editors complain that the local officials thwart at every turn their attempts to disclose the inner workings of the government and in particular its connections with local businesses, but government cover-ups are no stranger to the press anywhere in the world. Most of these city dailies have a newsroom with 20 to 30 PC-compatible networked computers for data entry, access to several wire services such as Reuters' Indonesian service, reasonably sophisticated pre-press computer facilities (sometimes based on high-end Macs), and private printing presses which will print whatever they're paid to. In the past, newspapers were the only source of relatively independent local information, and so were the target of Western assistance programs. This has paid dividends.

We estimate that a typical regional daily newspaper grosses, at most \$10,000 per month

Audience research data

Two firms have established themselves as sources for audience research data. Survey Research Indonesia (SRI) has been around for a number of years and has linked up with Nielsen Media Research, the American TV ratings company. SRI has recently implemented a People Meter system to collect data in the country's major cities and has well-established polling centers as well. A relative newcomer to the market, Frank Small & Associates (FSA) competes with SRI but uses a diary system combined with polling. Both organizations are finding that the economic crisis has hit their market hard, and there is some concern that one or both will fold.

Most of the national TV networks tend to use the SRI data. Almost all radio stations have FSA data because PRSSNI buys the diary data analyses for 17 cities (where 90% of the private radio broadcasters are located) and provides it to all its members who want it. The FSA surveys have come out every six months and are very detailed. Because of the inherent dependence of diaries and polls on people's knowledge, errors creep in, such as a rating for a station at a time when it wasn't on the air, and as a result some have criticized the FSA data. However, it also received a lot of praise for providing a commendable level of detail, breaking results out by many demographic characteristics.

In our opinion both SRI and FSA provide reliable gauges of audience measurement, their data, where directly comparable, diverge little. However, both concentrate their efforts on the major urban areas (about ten cities). This is natural since that is where the markets are, that is where the listenership and viewership is, that is where TVs are (even in the major cities, TV penetration is only about 80 percent), and that is where the private TV and radio broadcasters' signals are. For the same reasons, we recommend concentrating efforts on assisting broadcasters in the country's thirty or so largest cities (all those with a population over 250,000) and in just a few strategic smaller ones (such as Dili and Jayapura). This would allow assistance efforts to reach between a quarter and a third of the country's population. Work in smaller cities would consume resources without significant impact.

BROADCAST LAW

Indonesia's broadcast sector is regulated by two institutions, the Department of Information (DepInfo, or in Indonesian Deppen) and the Department of Tourism, Post, and Telecommunications. The latter is responsible for issuing frequency licenses, the former implements regulations that in effect manage the content of the country's media, state and private.

DepInfo has over 50,000 employees working in three directorates

- for Radio, TV, and Film
- for Press and Graphics
- for General

It is to the audiovisual directorate that TVRI and RRI are subordinated, and it is the Director General (Dujen) of this directorate whose politics are reflected in management of the broadcast sector. Traditionally, however, DepInfo is a powerful ministry and the person at its head is a political appointee, for instance, Habibie, who succeeded Suharto, was in charge of the DepInfo in the early 1990s.

The General Directorate, despite its unassuming name, is responsible for management of a vast network of what might best be termed extension agents. The over 20,000 staff communicate government policy to the masses and transmit information back up to the government about what the people “think” on the micro (village) level.

Private broadcasting is in theory regulated primarily by the relatively new Law 24 of September 1997. But because of the economic and then political turmoil, little has been done to implement it. For the most part, the Law merely codified existing practice that in turn had been earlier established by decree of one department or another. Perhaps its most dramatic step was the creation of the Broadcast Control Board (BP3N), which was to function as a new directorate in DepInfo. BP3N would include ex officio representatives of other agencies such as the Department of Post and Telecommunications, and would be responsible for reviewing and awarding broadcast licenses. But nothing has been done to appoint BP3N, and events have now overtaken the concept.

A new DepInfo minister was appointed when Habibî ascended to the presidency in May 1998, Mohammad Yunus Yosfiah. A military man, he seems to enjoy the more informal atmosphere of civil service. But he also is likely to view the DepInfo as a stepping stone. Shortly after his appointment, he commented in an interview that he saw no need for the Department to exist, which created a certain degree of optimism that the Department would, at the very least, significantly reduce its involvement in control over the media. In the event, the Department has taken a surprisingly benevolent approach in the post-Suharto period, quickly approving many newspaper registrations which had been held up for political reasons. For example, *Tempo*, whose license was revoked in 1994, was quickly re-registered and resumed publication in October.

In July of this year, Yunus conceded that the country’s media legislation needs to be revamped. Members of the media organizations described below began immediately to agitate for new laws, and DepInfo responded in August with proposals for modifications, at first reluctantly and with rather unimportant changes, but by September recognizing the need for a more thorough overhaul. At first DepInfo wanted to submit to Parliament just one new draft law which would unify the three regulatory areas it sees before it—broadcasting, film, and print. But recent indications are that the Department has realized this may not be practical, and draft laws on print media and on broadcasting have been written as separate legislation.

A hot-button issue central to the debate over how to regulate the media is that of journalists’ responsibility. At the heart of the matter is the question of how to rein-in those media that are more interested in sensationalism than in balanced coverage of current issues and in the truth. Most media NGOs are therefore scrambling to draw up codes of ethics, and they hope that by convincing journalists to voluntarily adopt such guidelines, they will be able to reassure the government that a reliable system of self-regulation is in place. The idea of a Journalism Council that would sit in judgement over those whose actions someone considers improper has been mooted in several sectors. While antithetical to the American standard of absolute press freedom, many in Indonesia believe that idea might be the best compromise to convince the government to begin reducing the formal control it currently wields over the media. Although exercise of that control has dropped considerably since Suharto’s resignation, most of the levers of control remain in place and could easily be re-asserted in case of a crackdown.

During our assessment, we found the discussion over new media legislation was just beginning. But we feared that the government might succeed in promulgating new laws which, while better than the old ones, continue the Indonesian government’s tradition of rather heavy-handed involvement in media regulation. Our work in other transitional countries has demonstrated that one of the more effective and least

threatening means of assistance in such a situation is to simply make available a Western specialist on media law to answer questions and to encourage NGOs to take an active role in lobbying for better regulation. Accordingly we asked Gerald Waldron of Covington & Burling, one of the US's top communications law firms, to spend a week with us in Jakarta in early August. Gerry has experience in drafting, lobbying, and implementing broadcast media rules. He presented several talks to those interested in media law issues, and attendees included parliamentarians, ministers, media law advocates, and many media leaders themselves. A great deal of discussion focused on simply describing some of the principles of American broadcast law, and in particular the strengths and weaknesses of the 1934 Communications Act and the role of the FCC.

One issue that received a lot of attention during Gerry's visit was that of foreign ownership of the media. Current Indonesian law forbids foreign ownership of broadcasters, but many believe that it is necessary to relax this restriction in order to attract the foreign capital that could rejuvenate the industry.

Goenawan Mohamad, editor of the de-registered and now re-registered weekly *Tempo*, agrees that NGOs and media themselves need to take a more active and coordinated approach to working with the government toward better media regulation. But he says it will not be easy: "for so many years, we viewed the law as a joke, so it is difficult to take it seriously now." Although we considered our mission to be primarily a fact-finding one, one of the priorities we set for ourselves early in our assessment was to prod the media NGOs to take an active yet constructive approach to working with the government on new media law. AJI, ISAI, and PRSSNI have responded by calling meetings with the government's drafters and by, in some cases, drafting proposed legislation of their own.

Parliamentary deputy Aminullah Ibrahim says that the current draft media laws that the DepInfo has drawn up will enter the full discussion phase in mid-November. The "discussion process" could take as little as a few weeks or as long as several months. Ibrahim says parliament is open to hearing the positions of NGOs, and in our experience he has proved willing to meet with them.

We have therefore asked Aleksei Simonov, a prominent media rights activist in Russia, to spend ten days in Indonesia at the end of October to share his experience with media law reform across the former USSR, a process in which he has been intimately involved in many countries since founding the Glasnost Defense Fund in 1991. Simonov sits on the Russian frequency licensing board as a representative of "society." He also speaks Indonesian, a remnant of his first career in Asian studies, and in the 1970s and 1980s he was one of the Soviet Union's leading film directors, with 24 credits to his name.

Another aspect of media law that is bound to be controversial is the issue of what should be done with TVRI and RRI. There is some talk of allowing the state broadcasters to accept advertising. Others advocate making these organizations into some sort of public broadcasting service along the lines of the BBC. But it is not clear how it would be financed, since a tax on TV sets is probably unenforceable (though authorized by the 1997 broadcast law) and could not be afforded by most viewers today. Yet others have mooted the idea of privatizing the state broadcasters. We believe Simonov can provide some advice on this topic as well, since he has been a keen observer and critic of the process by which Russia's two national state broadcasters have been by turns pillaged, commercialized, privatized, and nationalized.

We recommend continued encouragement and support for the Indonesian NGOs that have begun to actively lobby for revised media legislation. Support for a media law center, an idea that has been floated by Assegaf and Goenawan Mohamad, should be

considered, along with some support from international organizations which have provided media law reform assistance in other countries

ORGANIZATIONS ASSOCIATED WITH THE MEDIA

One of the markers of the social control practiced by the Suharto government is the creation of government-mandated and -financed associations which functioned to both represent the interests of their members to the government and to enforce government policy as they carry out their business aims. Examples included PWI, SPS, and PRSSNI. Typically highly regimented, these organizations have found themselves in a peculiar position in the "reformasi" period. Whom do they represent—their members, or the government?

The answer to this question depends on the degree to which each organization's leadership is able to stake out a constituency, assert independence from the government's heavy hand, and find independent sources of funding. Besides the organizations detailed below, others which have a peripheral relationship to the media and with whom we met include the Public Relations Association of Indonesia (Perhumas), the Association of Advertising Agencies, the Indonesia Intellectual Property Society, and the Association of Newspaper Publishers (SPS). The Indonesian Legal Aid Foundation (YLBHI) and the semi-governmental National Commission on Human Rights (KomNas-Ham) are in the forefront of speaking out against government repression but have not emphasized freedom of expression in their work.

In 1983 Suharto implemented a law which required that every non-commercial organization (association, party, NGO, religious organization, etc.) explicitly state in its charter that it supports Pancasila, the five-point state ideology propagated after independence. In this way all legal entities essentially had to declare loyalty to the state and the government as constituted, and any organization which viewed its role as opposition or criticism found itself unwilling to conform to the requirement and therefore unable to register. Pancasila is now under attack, so it is unclear to what degree this requirement will now be enforced.

Institut Studi Arus Informasi

ISAI was founded in 1994 using the resources of the weekly newsmagazine Tempo, which was closed by the government that year for political reasons. Its staff champion a number of general freedom-of-speech initiatives such as prizes for investigative journalism, round tables on media issues, and support for media legislation. ISAI is also a member of the International Freedom of Expression Exchange (IFEX). In addition to their free speech activities, the organization serves as a center for a freewheeling circle of independent thinkers and in its building houses an art gallery, a bookshop for independent literature, and a stage for local productions and round tables.

Lembaga Pers Dr Soetomo

LPDS, Dr. Soetomo's Press Institute, is the brainchild of Assegaf, the manager of Media Indonesia, one of the country's main daily newspapers. It functions chiefly as a training institution for print journalists and works closely with ISAI. Assegaf has deputized daily management of LPDS to Atmakusumah, who has become a fixture in freedom of expression debates with his intelligent, reasoned arguments and wide-ranging knowledge about media regulation elsewhere in the world. Atma, for instance, quite justly asks why there needs to be a press law at all given that other regulation—such as copyright and libel law, regulations concerning distribution of

pornography and violence, and the tax and commercial codes—cover almost all conceivable bases (The answer, of course, remains the troublesome “SIUPP”, the newspaper license)

Persatuan Wartawan Indonesia

PWI, the Indonesian Journalists' Association is the official journalists' union. The organization is considered by most of its members to be principally a government organization to which they must belong in order to work as a journalist at any of the government-sanctioned media. Until recently, a publisher or broadcaster couldn't operate without being sanctioned by the government. PWI was formed shortly after independence “to support the new country,” as one regional PWI chief told us. That sums up PWI's role since then.

Some journalists are considering quitting, but most see no reason to do so, PWI may not offer them much, but membership does result in a press card without which many of the more officious bureaucrats may refuse to grant an interview. Most said they considered it unethical to belong to both PWI and AJI (see below) and therefore planned to join AJI when their current PWI membership expired. PWI's membership is well over 5,000. Every journalist in the country is well acquainted with PWI.

Aliansi Jurnalis Independen

AJI, the Alliance of Independent Journalists, was founded in 1994 in response to government repression of the media in the form of the closure of several newsmagazines (DeTik, Editor, and Tempo) for political reasons. For the first few years its members saw their mission as explicitly political, and its members accordingly suffered investigation, imprisonment, and exile. AJI quickly applied for membership to the International Federation of Journalists and was admitted the same year. AJI defines itself as a counterweight to PWI, and is trying to adapt to a situation where its position which is usually in opposition to the government's no longer requires it to be underground. It has been able to officially register, open an office, and hang out its flag. The office has two working computers and three broken ones and radiates an aura of down-at-the-heels activists determined to stand up for their principles no matter what, with posters and bumper stickers and pamphlets all over. They have been working on creating a web site.

AJI was created by print journalists and its membership still strongly reflects this. In August, AJI's youthful President, Lukas Luwarso, stated that there was no reason why broadcast journalists couldn't join, but none had. In general, broadcasters have seen AJI as so print-oriented and thus have moved to create their own journalists' associations. The reasons for the domination of print journalists lie principally in the role of the print media as flag-bearers of investigative journalism during the Suharto period. Broadcast media were under such tight control that few if any broadcast journalists considered themselves oppositionary enough to engage in the type of openly confrontational activities that AJI sponsored. Conversely, any journalist seeking an outlet for independent opinions chose print journalism, not broadcast. In September, Lukas said he would like to try to attract broadcast members, a more active policy than AJI has evinced in the past.

While we were in Indonesia, AJI was able to secure assurances from the government that no longer was PWI the “only recognized journalists' association,” a triumph. Many AJI members consider PWI reactionary enough that they have torn up their membership cards, but others keep their PWI cards so they can continue to work in state-sponsored media, which used to require PWI membership and, technically, have not rescinded this rule. AJI and other representative organizations and journalists are hoping that the new media legislation, which should come before parliament by early

1998, will codify freedom of association by officially reversing the 1975 ministerial decree that makes PWI membership mandatory for journalists. AJI has taken an active stance in promoting new media legislation in general, and is one of the constituent members of the informal Committee for Media Law Reform.

One of the stated goals of AJI is to turn itself into a union for professionals in the journalism business. To do this, though, it will have to broaden its base considerably for it only counts some dozens of official members so far. AJI has set for itself an ambitious plan of action for the next three years, a plan with the following five goals:

- establish the legal groundwork for a union
- propagandize the concept of a journalists' union
- aggressively defend violations of members' rights
- garner enough members to be taken seriously, including in the broadcast sector
- establish branches in each of the country's 27 regions

At present, AJI has one official branch, in Yogyakarta, with informal branches in a number of other cities, including Medan, Semarang, Ujung Pandang, Pontianak, Banjarmasin, and Palangka Raya.

In addition to forming a union, expanding its membership base and supporting its members, AJI has plans to publish and distribute educational material, to conduct workshops and seminars on journalism training and advocacy, and to conduct regular monitoring of and reporting on the media scene in the country.

AJI has no independent financial resources. PWI, the already-existing journalists' association, is subsidized by the government. AJI hopes that those subsidies may be shared, but is extremely sensitive about issues of government control. We strongly advocate that foundations provide AJI with support, but it will be necessary to remain sensitive to AJI's understandably delicate sensitivity vis-à-vis government control, whether Indonesian or foreign. AJI Yogya has also drawn up a detailed plan of action which, if anything, is better thought out and focused on day-to-day issues than that of AJI Jakarta, their budget totals about \$30K. The "dream budget" which AJI Jakarta provided to us asks for \$80K in one year, principally for building the organization, and an additional \$130K over the next several years for a number of projects. Both AJIs are active users of e-mail.

Forum Wartawan Radio

FOWAR, the Forum of Radio Journalists, was created in early 1998. The organization now has about 50 members across the country and is actively seeking new members by making itself known to radio journalists nationally. The newfound ability of local private radio to broadcast news, combined with the reduction in the number of official newscasts they must rebroadcast, has instantly created a new constituency, one which no other organization seemed to be courting—radio journalists. Eric Sasono, of Delta Radio in Jakarta, is the mastermind behind the idea.

The founders have begun to draw up their goals and a code of ethics and to establish links with international organizations that can help support the FOWAR's goals. ISAI has provided active support, helping to organize seminars for radio journalists with funding garnered by the Canadian Committee to Protect Journalists. The first seminars were held this summer and were taught by two journalists that the CCPJ sent.

FOWAR has not been registered as a legal entity and serves more as an informal grouping than an organization, but its Jakarta members hold regular meetings to discuss the issues they face. Members hail, predominantly, from Jakarta and surrounding cities. With no real funding, the founders have not had a chance to make

any real efforts to extend their membership nationally. At most of the radio stations we visited, someone had at least heard about the organization's founding through news reports but did not yet know how to go about joining.

Persatuan Radio Siaran Swasta Nasional Indonesia

PRSSNI is the Association of Indonesian National Private Radio Broadcasters, which unites radio station owners. A handful of energetic young radio managers have been using the organization, a creature of the Suharto government, to press aggressively for new media legislation which would ease the restrictions on private radio. In our opinion PRSSNI has been among the first to understand the power of lobbying as opposed to criticizing those in power. It is too early to tell whether their approach has had any effect, though.

PRSSNI is funded by selling advertising that it requires its members—every single private radio station in the country—to carry. Some members grumble about this, although it seems an eminently reasonable way to collect a membership fee. While some stations have indicated that they plan to quit PRSSNI as soon as they can, we observed that stations' attitudes toward membership are in many cases directly related to the behavior of the local PRSSNI branch chief. Some branch chiefs seem to consider their post a fiefdom from which they could earn money (e.g. by charging for the recommendations that each radio station needs annually in order to renew its frequency license). Most branch chiefs, however, recognize that their role should be one of serving the needs of the organization's member stations, although conflicts of interest are occasionally present because most PRSSNI branch chiefs are radio station owners themselves. Each PRSSNI branch chief has been equipped with e-mail.

PRSSNI uses its resources to hold seminars for employees of its members, to buy detailed audience research data and distribute it to stations free of charge, to pay royalties for its stations, and to subsidize the publication of *Eksponen*, a useful radio industry biweekly color newspaper.

Ikatan Jurnalis Televisi Indonesia

IJTI, the Television Journalists' Association of Indonesia, announced their existence while we were in Indonesia. They have not regularized operations to the point where they would have a well-defined set of goals. We met with one of the group's de facto leaders, Desi Anwar, a popular anchor on RCTI's news. The 400-person turnout for their founding congress—and heavy participation from TVRI journalists—caught even the founders by surprise. As with AJI and FOWAR, the movement has been born out of a feeling that PWI does not adequately represent their interests. The three general goals they have been able to agree on so far are TV-specialized training, a press card that would identify and validate members, and legal advocacy both for better media legislation and to defend individual members whose rights have been violated. Since the founding congress they have registered as an association and now have over 800 members.

Association Support in General

Assistance provided to media NGOs that have demonstrated a commitment to freedom of the press is money well spent. The more avant-garde organizations, such as AJI, are important parts of Indonesia's already vibrant independent media scene. More conservative ones, like PWI, still need to prove their commitment to the media's role as the fourth estate. There are a number of efforts that are better conducted by outside implementers with more experience in (for example) production, training, and equipment distribution. But projects such as media law

advocacy, monitoring of abuses, and legal assistance to the media will be more cost-effective, and in some cases more effectively carried out, when performed by Indonesian media NGOs, given the strength of the dollar against the rupiah

OTHER MEDIA ASSISTANCE EFFORTS

We discussed with other organizations the prospects they see for media work in Indonesia. The Asia Foundation has provided support for a number of press assistance efforts in Indonesia but has not concentrated on electronic media or on media law. A current ISAI/LPDS project funded through TAF by USAID aims to train 200 newspaper and radio journalists over the next year, but per ISAI, it concentrates on the written word and not on sound or image, and is intended more to guide journalists in the practice of their profession than to transfer particular practical skills.

UNESCO sent a research team to Indonesia in July 1998 but has not issued a report on their findings, in discussions with us they have evinced an intent to focus on the print media and on playing a coordinating role in media aid to Indonesia. The International Federation of Journalists (IFJ) also visited in July 1998 and expects to be able to provide some organizational assistance to AJI and perhaps to PWI. The Indonesian-language departments of various foreign broadcast services in conjunction with their countries' respective embassy press offices keep some contact with private media in Indonesia but none seem to have the resources or experience to undertake the intensive in-country training programs which the country's private radio stations need right now.

Other regional organizations such as the Press Foundation Institute have organized seminars and other pan-Southeast Asia media events, but most are forums for sharing experiences more than concentrated attempts to provide new knowledge.

INTERNET

Providers, topology

Foreign observers have called the fall of Suharto in 1998 the first "Internet revolution." But while the Internet did play a key role in the coordination of the student protests, which served as the nucleus for the demonstrations and rioting that eventually led to the president's resignation, Internet penetration is by no means high, nationwide. The total number of people with access to the Internet is no more than 100,000 out of a total population of nearly 200 million. About half of those with access are in universities. Of this 100,000, the vast majority cannot afford to use their access for more than e-mail.

There are about 40 licensed Internet service providers (ISPs). Most major cities have three to five Internet providers, usually points of presence (POPs) of several of the ten or so largest commercial ISPs in Jakarta. Each is likely to have a 64- or 128-Kbps VSAT or, more commonly, leased-line connection to the parent office in Jakarta, and each serves 150 to 400 subscribers. The total amount of Internet bandwidth between Indonesia and the rest of the world is about 11.8 Mbps. No more than thirty cities in the country have ISPs. As in the radio world, those with licenses have successfully lobbied to prevent any more entries into their field, arguing that prices are already too low and more competition would cripple the industry.

To keep costs down, most ISPs have a much lower ratio of modems and bandwidth to subscribers than in the West. As a result, users often complained that dial-ups were busy and access speed was glacial.

Wasantara-Net, the PTT's Internet provider, has the largest number of POPs around

the country, 81, including one in each of the 27 regional capitals. In the smaller and more remote cities like Banda Aceh, Wasantara-Net is the only service available. In some cities such as Medan, Wasantara-Net provides only e-mail services, not full dial-up IP. Because Wasantara-Net has privileged access to the national communications structure, its rates are lower than the private ISPs', but its quality of service is also considered lower. The staff who run and service the hardware in the local post office know very little about the system's workings, and when there are technical failures, they must wait for an expert from a larger city to come fix it.

IndosatNet is the largest ISP by number of subscriptions, claiming 20,000 nationwide. Indosat was until recently the government-mandated monopoly international telecommunications provider and thus has somewhat of a lock on the long-haul Internet market, any other space segment provider servicing an Indonesian customer must pay a hefty surcharge to Indosat for the privilege of competing. Although several of the larger private ISPs have their own Internet connections to the "outside," most buy Internet service in x64-Kbps chunks from Indosat. (Indosat is Indonesia's Intelsat and Inmarsat signatory. Satelindo was recently authorized to compete with Indosat in the international telephone market—but Indosat's little-known part-ownership in Satelindo is illustrative of the cross-holdings that are typical of the incestuous world of big companies in Indonesia.)

Access to resources on the Internet the world over is guided by the use of domain names such as *internews.org* or *www.yahoo.com*. The six three-letter generic top-level domains (gTLDs) apply mostly to servers in the US. Outside the US, each country has been awarded (by the ITU) a two-letter TLD, and Indonesia's is "id". A government-approved registrar usually carries out management of second-level domains (the part just before "id"), but several organizations in Indonesia quarreled over who should be the registrar, so the IANA (the Internet naming authority) has temporarily reclaimed control over domain registration until the disagreement can be worked out. Indonesia has decided to not allow any second-level domains except the generic "ac" (academic), "co" (commercial), "go" (government), "org," "net," and "mil." There are about 2000 third-level domains in the country, which is a relatively low number for a country the size of Indonesia.

The other largest providers—the ones with POPs in cities outside of Jakarta—are Indonet, CBN, Radnet, Meganet, IdOLA, Access, and Melsa.

APJII, the Association of ISPs, has created the Indonesian Internet exchange (IIX) in Jakarta. Each provider is putting in a leased line to the IIX so that intra-Indonesian traffic can be routed across the exchange instead of out of the country on one provider's link and back on another's.

Patterns of, and obstacles to, Internet usage

There are very few Indonesian-language resources on the Internet, so as in many other countries Indonesians must speak English in order to find the World Wide Web of much use. Anecdotal evidence suggests the majority of traffic over Indonesia's IP network is e-mail and, to a lesser extent, chat services. Because of the government's relatively repressive approach to freedom of speech (until recently), many users felt more comfortable using a mailbox outside of the country (on a free-mail service like Hotmail or MailCity). Thus, gauging use by the number of mailboxes is imprecise at best. (Of the 19 students who met with us to describe their three college radio stations at UGM in Yogyakarta, 13 had e-mail boxes, of which only two were domestic.) For instance, most universities with IP connectivity reported that they serviced only 200 or so mailboxes, even as the number of students using their computing centers for Internet access was closer to 500. Queries of students confirmed that their primary use for the Internet is e-mail.

We aggressively searched for an English-to-Indonesian machine translation system but were unable to find one. Such a tool would dramatically simplify Internet access for the ordinary Indonesian. Experiments elsewhere in the world with web browsers with built-in automatic language translation herald a new era where, whatever your language, the Internet's resources are at your fingertips. But the Indonesian market is evidently not yet considered important enough for creation of such a tool to have been thought profitable by developers. We found one academic group working on a theoretical model that would translate between the Asian languages, but a two-step translation (through some other language to English) is unlikely to prove accurate enough even for general scanning of materials.

While language difference is a barrier, alphabet is not (as it can be in countries that use non-Roman alphabets like Cyrillic or Kanji). Because the written Indonesian language uses Roman characters, writing Indonesian in e-mail is no harder than writing English. Due to the paucity of Indonesian-language sources as well as the slowness of access, mailing lists are a very important service, quite possibly the most important one—the “killer app” that serves as the reason why many users are on-line. Lists such as apakabar@clair.net (“news”) have thousands of subscribers and resound with on-site reports provided by local users—and with the inflammatory commentary typical of discussion groups the world over. Several universities have set up their own list processors (the software used to manage lists), but the only very active one in the country is at the Institute of Technology in Bandung, with about 170 lists and over 15,000 cumulative subscribers. (By comparison, Internews' list processor in Moscow, one of the larger ones in Russia, serves about 60 lists with around 1000 cumulative subscribers.) The largest lists, though, are hosted abroad. A guide at <http://indonesia.elga.net/id/milis.html> provides information on and links to about 200 Indonesia-related lists.

The telephone lines in most of Indonesia's cities are, while not of Western quality, quite adequate to support a 14.4-Kbps connection (and often better). The larger impediments to wider Internet access lie in the number of computers and the cost of dial-up IP. While most companies in Jakarta now use computers, computer use outside the capital drops precipitously, to the degree that cities of a million or more may only have a few computer dealers and a few thousand computers. Generally a decent computer can be had for under \$1000, but even that is a lot of money for a country where (now) over forty percent of the population earns less than the generally accepted subsistence level of one dollar per day.

Dial-up IP purchased from a commercial provider usually costs about five dollars a month for a login, a mailbox, and some minimum number of hours of access (10 or 20), there are no volume charges. Additional connect time costs in the neighborhood of \$0.50 per hour. Unfortunately, Indonesia's local telephone service provider (Telkom) charges on a per-minute basis for local calls, and at about \$0.01 per minute, telephone charges more than double the cost of Internet use via dial-up IP.

Most of the universities we visited which had Internet access found they had to charge students for the privilege of using the connection, generally a minimal fee of \$1.50 per month, which many could not afford. Even faculty are usually charged (at a rate slightly above or below the student rate), so many faculty do not have e-mail either, even if they have access to a computer.

Most of Indonesia's larger cities now have an Internet café or two, and some have more. Modest affairs, the one we visited was called a “warung Internet” (warung is Indonesian for the collection of kiosks or stalls dotting the cities that sell cheap fast food cooked in a wok before your eyes). It had six booths where, for \$0.50 per hour, you could surf to your heart's content. The proprietor said that business had been brisk until the economic crisis hit, but picked up dramatically when the political

turmoil began as people were desperate for news. In the morning and evening his computers were usually all in use.

Suspicion that the government monitors the Internet is rife and is probably not totally without foundation. Keeping track of mail delivered to a certain domestic mailbox would be relatively easy. (This probably explains the popularity of Hotmail—a non-Indonesian, and therefore more secure, mail provider.) However, the sheer volume of Internet traffic makes it unlikely that it can all be monitored, even selectively: the total carrying capacity of Indonesia's Internet exceeds 100 gigabytes per day, and filtering that volume is not very practical. Unlike Singapore, for example, the government has no stated censorship policy. And as far as we were able to determine, there are no effective gateways in place which could prevent access to some resources, although there has been some rumbling about introducing legislation which would require this. Some reports have indicated that Indonesian activists have begun to aggressively use encryption methods to avoid being monitored. Doing so would be relatively trivial for a technically proficient user, but none of the users we encountered, even among specialists, had ever encrypted or decrypted anything, nor did they recognize the names of either of the two dominant encryption protocols used in e-mail communication, S/MIME and PGP. We can only conclude that encryption, if it is used at all, is extremely rare.

Media use

Use of the Internet by the media is extremely sporadic, and even where Internet access is readily available it is poorly understood, at best, someone knows how to go to cnn.com to find out international news that can be read over the air on a private radio station. We estimate perhaps five percent of the private radio stations have an e-mail address, up to half have computers but most are relatively poorly equipped for more than keeping track of who has called in and doing basic accounting calculations. We have arranged for a list for radio station use to be set up at ITB and will be adding stations to it as we find their addresses, we know of about 20 already.

When queried as to why they don't use the Internet for information gathering, many employees of the private media we visited said they didn't feel they could distinguish between fact and rumor on the Internet. They cited the example of a picture distributed on the Internet that supposedly portrayed victims of sexual assault during the May 1998 riots. But the Internet, like any news source, must be used intelligently and judiciously. Training on computer-assisted journalism would be very helpful on this front, and would be very easy to conduct.

Even though usually technically better equipped than radio stations (in order to efficiently lay out their daily issues), newspapers are generally equally poorly prepared for the Internet age. A very few use it intensively for exchanging information and even pictures with news services in Jakarta and for putting their newspaper's text up on a local web site. Most stations have no Internet or, if they have an e-mail address, they don't know how to use it. Providing e-mail capacity on a wide scale and training stations how to use the Internet to get news and background for their own stories could dramatically improve the ability of the independent media to provide interesting and useful information to the population. For instance, none of the computer people at the media we visited could name a single one of the five large Internet search engines/portals.

Too, in more distant cities newspapers from the center arrive late in the day or even a day or two after publication. Local media that can use the Internet to get news from Jakarta news-based web sites are thus at an advantage and can provide the national news that has not yet arrived in paper form. Many media subscribe to Antara, the state wire service, but those who do are unanimous in noting that its news is relatively slow.

and lacking in completeness and detail. In the past, all news agencies providing information (including foreign ones) were required to work through Antara, but this unabashed censorship measure is likely to fall by the wayside in the current reform period. A real opportunity exists for a new private news agency to set up shop to serve the burgeoning demand for national information.

Many media indicated their willingness to exchange information with media in other cities, but our experience in other countries has shown that such an approach is not likely to be exceedingly successful. Usually, most participants are more interested in receiving than sending, since almost all media outside the capital are deeply local. That said, some of the Jakarta-based media conglomerates have successfully implemented such a system by taking ownership stakes in radio stations or newspapers around the country and imposing a news-sharing policy. Few if any are technically sophisticated enough to use the Internet, though, some use fax, while one uses a dial-up server in Jakarta.

University use

University use of the Internet is still in the first stages of development. Only about 50 of the country's 1300 institutions of higher education are on-line, and those that are on-line have limited resources to make the Internet available to the student body as a whole. Generally from 100 to 500 students (out of 10,000 on a medium-sized university campus) have access. The issue is principally one of cost, few universities can afford to buy many computers and network them, and fewer still can afford the monthly \$1000 or so that a 64-Kbps Internet connection would cost.

Therefore, although unrelated to the media, we believe that a crash program of providing connectivity to universities could have dramatic and far-reaching effects on Indonesia's academic and political landscape. We recommend upgrading the already-jammed bandwidth that some schools currently have and providing connectivity to those that have a LAN but lack only the money to connect the Internet. In this way thousands of students and faculty could begin to have access to the hundreds of terabytes of information available in cyberspace, could learn the basics of networking, a paradigm which seems destined to dominate the developed world, and could communicate with each other and participate in any of the nearly 100,000 specialized discussion lists—in essence, communities—which have developed on the Internet. Moreover, because of the packet-based nature of the Internet, increased use creates an economy of scale: the more that use it, the lower the cost per unit of use, whether measured by time or by volume. Such a project could be leveraged by requiring grant recipients to match costs and perhaps to provide Internet access to other target organizations such as media and NGOs.

MEDIA EDUCATION

Dozens of universities train students for work in the mass media, yet few do an adequate job of preparing the generic "journalist" who would form the foundation of a news culture. In most institutions of higher learning, faculty of social and political science (FISIPO) includes a communications department. Because private broadcasters were officially disallowed from providing "news," the demand for broadcast journalists has been limited to TVRI and RRI, and thus few universities have seen the need for a separate course of study for broadcasters.

Within a communications department, a common concentration is journalism, which usually means print journalism, but many communications graduates do not specialize and are destined to work in the DepInfo's General Directorate. Marketing (or advertising or public relations) is also a common concentration, one to which an increasing number of students are drawn by the prospect of greater financial rewards.

A very few provide a concentration in electronic media. Most communications departments provide a D3 certificate, which is a three-year course of study focusing heavily on one of the concentrations. A much smaller number of students complete a more comprehensive and general four-year communications degree known as an S1. UGM's communications department, for example, accepts about 65 students per year into its S1 program, and about 180 per year into its three D3 concentrations. Most national newspapers prefer S1 graduates because of their broader general education.

The training for a career in journalism usually emphasizes research and writing theory rather than practical application. This is particularly true of broadcasting training. Very few journalism faculties have the equipment that would allow them to provide practical instruction in production of audio-visual products. For instance, we were unable to discover a single institution of higher learning that had its broadcast journalism students producing anything for broadcast (although many universities have student radio stations that broadcast music), although instructors were often drawn from local TVRI affiliates and would often invite the best students to intern at the TV station.

The University of Indonesia in Jakarta and two schools in Yogyakarta, UGM and Atma Jaya, have basic TV production equipment. UGM, for instance, has ten S-VHS cameras, three S-VHS editing suites, and one high-end Macintosh (for graphics) for over 200 journalism students, Atma Jaya has four cameras and two S-VHS editing suites for 120 students. But the samples of student production that we saw at journalism faculties followed the TVRI model of what might be called publicistic reporting rather than the faster-paced fact-based journalism required to provide a maximum of information in a short, balanced package. Birowo, a professor at UGM, says they are one of six schools in the country with a serious broadcasting concentration. He also notes that there are few broadcast journalism textbooks in Indonesian, a complaint we heard elsewhere as well. Agus, Atma Jaya's Communications Department dean, says he doesn't know of any schools that teaches journalism students how to use the Internet for their work. But most do have some sort of course on ethics and media law for students concentrating in journalism.

Broadcast production skills (as opposed to journalism) are even more difficult to acquire. As far as we could tell, there are no formal training programs in these areas. Most who do have training have acquired it in the film departments, which are increasingly working on video because of its lower cost and the greater ease in editing. There are two arts institutes in the country which train shooting and editing as part of an S1 degree, one in Jakarta that is using low-end non-linear digital editing tools and one in Yogyakarta that has a Beta SP suite. Both displayed an excitement and spirit of innovation that we did not detect in all the universities we visited, but each has such limited human and equipment resources that they can turn out only some fifteen students per year.

Most education costs something for tuition; state subsidies are not enough to cover all expenses. For instance, Yogyakarta's Atma Jaya reported per-semester costs of about \$60 for a full course load. It sounds reasonable but it can be a heavy burden for parents who earn little. Our informal survey as we traveled Indonesia yielded average monthly incomes in the range of from \$40 to \$100 for educated professionals.

Outside the universities there is a small network of rather less formal training centers for those who aspire to work in TV production. These include Puskat, MMTTC, LP3Y, and Mandiri in Yogyakarta, all of which provide some combination of basic shooting, editing, and reporting training but little more. MMTTC is TVRI's official training center and accepts only TVRI employees for short courses to upgrade production skills, and for this reason we did not visit it. LP3Y has facilities only for print training, and has conducted seminars on e.g. health reporting using funding from the

Foid Foundation, in cooperation with ISAI and LPDS, they are currently conducting a training project for journalists from around the country on writing, ethics, and the law

Puskat and Mandiri both have several S-VHS cameras and editing suites and are better prepared to provide TV production training, Puskat has received grant funding before and clearly has a well-established protocol for conducting seminars; the students at Mandiri demonstrated an excitement for video that we found rare in Indonesia. Puskat concentrates on short courses funded by donors, Mandiri, on the other hand, runs six-month or one-year for-pay accredited courses that provide students with a D1 certificate in TV reporting or production. Some participants attend of their own accord, and some have been sent by their employers (e.g. TPI). But neither have audio production equipment and neither considered radio to be a "real" medium for news production.

We recommend consideration of pairing foreign journalism institutions with Indonesian ones to provide assistance in developing broadcast journalism courses and curricula. This would need to be structured, however, to include substantial funding for purchasing equipment on which students could work.

CITY STUDIES

In this section we provide a series of short portraits of the organizations and people with whom we met in the eleven cities. Collectively they serve to anecdotally illuminate the situation and trends in the Indonesian media in August 1998. We have kept these sections very brief, since a comprehensive description of every interview would occupy hundreds of pages.

Java

Jakarta

This sprawling, dirty metropolis counts over twenty million inhabitants, including its suburbs in three directions (the fourth is the port). The downtown has been subject to a breathtaking building boom in the 1990s and is now dotted with fifty-story modern-looking skyscrapers. No other city in the country even approaches Jakarta's sheer size and variety.

Perhaps our most breathtaking of many visits was to the building inhabited by the media corporations that make up Peter Gontha's empire. Mr. Gontha has styled himself as the Indonesian Rupert Murdoch. The seventeen-story building is outfitted with the latest in technology that may not exist in any other building in the world.

- SCTV, a national TV network, including daily national news production (twelve fully-digital editing suites on a ten-terabyte server) and national sales department
- the fully redundant encoders and transmitters for Indovision, Southeast Asia's first digital (MPEG-2) DTH TV system
- facilities for originating a number of Indonesian-language channels for Indovision
- a digital head-end for the city's only cable TV, serving as yet only about 15,000 subscribers
- the subscription and service center for the DTH and cable TV systems
- two daily full-color newspapers (one in Indonesian, one in English)

Mr. Gontha told us he was lucky that he paid for all the equipment just before the economic crisis hit. SCTV is part owned by Bambang, one of Suharto's sons.

Hinca Ikara Putra Pandjaitan is a lecturer in broadcast law at the Atma Jaya Catholic University of Indonesia. He carefully followed the evolution and passage of Law 24, that for the first time implemented a complete legislative framework for broadcasting in Indonesia. The result is a 150-page book (in Indonesian) on the process, including detailed studies such as how much each of the 52 members of the parliament's committee that considered the law talked.

Aminullah Ibrahim is a deputy in the DPR, the regularly-sitting chamber of Indonesia's parliament. (The other chamber, the MPR, meets much less often and as a rule merely approves the DPR's actions.) The DPR has thirteen standing commissions which consider legislation before bringing it before the full body, and Ibrahim is the deputy chair of Commission One, which is responsible for information policy as well as foreign affairs, national security, and defense. The Commissions include representatives from parliament as well as from all relevant Departments (ministries) and other organizations like the PWI, and in all number over 50 members, but have subcommittees for each of the issues within its jurisdiction, and Ibrahim heads the information policy subcommittee. Ibrahim told us that he believes the current media law is inadequate and needs an overhaul.

Echoing a refrain often heard during Suharto's presidency, though, Ibrahim questioned the appropriateness of applying Western "modes of thinking" to Indonesian freedom of speech issues. Ibrahim pointed out that even if relatively liberal media laws were to be proposed, society might not be ready for the resulting freedom. While this is a common subterfuge used by those who would limit media freedom, it is also a very real reflection of the views of a traditionally conservative population at large. He warned against unfettering the press completely, pointing out that the media have the capacity to inflame as well as inform. Although frequency allocation should remain centralized, Ibrahim advocated decentralizing some of the implementation of broadcasting regulation to regional governments, particularly if as seems likely local private TV is going to develop. (We heard from other quarters that responsibility for newspaper regulation might also be devolved to local governments. It is hard not to applaud a reduction in the level of federal control over the media. But similar decentralization in other countries has proved in some cases more harmful than helpful. Aggressive local media are usually thorns in the side of the local government, and local government rarely hesitates to use all regulatory powers in its hands to reduce the media's independent ability to turn the glare of publicity on governmental actions.)

Trijaya Radio is one of Indonesia's top FM radio stations and is one of nine stations held by the Bimantara group, which counts among its major shareholders Peter Gontha, T Syaiful Azwar, and Bambang Trihadmojo (Suharto's son). Trijaya targets young professionals and has started to focus on produced programming and talk shows, flagship shows include Jakarta Channel each morning in which prominent figures are grilled and Monday afternoon's Jakarta Forum which provides a "soapbox" for someone with interesting, controversial ideas. Thursday afternoon's Bedah Kasus provides an in-depth investigative report on the issue of the week, and occasional live-from-the-field reports in the afternoons cover local economic business issues. They syndicate some of their programs to their sister stations around the country.

Trijaya broadcasts hourly news bulletins of six to eight minutes each which are read from a separate newsroom with four computers and full access to the wires news services including Reuters and Antara. The station has eleven news journalists on staff and expects to hire four more soon. Reporters use mobile phones and walkie-talkies to report in and receive assignments, and MiniDisc recorders to record interviews. Unfortunately, news staff work from 08 00 to 17 00 on weekdays, and the equipment is packed up for the weekends.

Even Trijaya, one of the most advanced radio stations in the country, lacks the technical know-how to make operations run smoothly. For instance, MiniDisc materials must be transferred to tape for editing, instead of using a computer. The station's technical manager is from the Philippines since domestic talent couldn't fill their needs.

Revenue dropped precipitously after the May riots but has already started to recover and Trijaya projects full recovery by the end of 1998.

APJII General Secretary Teddy Purwadi notes that Indonesia was on track to continue doubling the number of Internet users annually until the economic crisis hit, which he estimates has set back Internet development by at least two years. The Association's Internet exchange has helped to reduce costs, since the largest single expense in any ISP's budget is purchase of international Internet service. The exchange's utility is particularly clear in light of traffic statistics that show that over 80 percent of cumulative Internet traffic is domestic. Academic use of the Internet tends to be realistic only in the five largest cities in the country.

Intellectual Property Society President Cita Citrawinda Priapantja says Indonesia complies with most international norms in the field of intellectual property rights (IPR) law but the field is changing quickly and they are working to keep up. Our experience confirms this, while VCD piracy is rampant simply because it is very difficult to track, most media (print and broadcast) generally observed copyright regulations, unlike in many other countries in which we've worked. Indonesia has signed the TRIPPS agreement but has not yet passed implementing legislation. The largest barrier to well-enforced IPR regulation lies in the court system, since few courts are well enough versed in the issues to be able to apply the law well.

Trisakti Radio is located on the grounds of Trisakti University and in 1995 converted from being a university station to a commercial one partly owned by private investors. Since broadcasting news has been de-banned, Trisakti's 40 employees have worked to provide more information to their listeners, primarily a younger audience—university students and recent graduates. They now have three people dedicated to news, though they expect to end up with five people working on news around the clock. Ad rates hover around \$10 per spot. About half their revenue comes from domestic advertisers and half from foreign firms. Of sites on the Internet that they surf for international news, they use about half American and half European sources, but say there are none in Asia that they trust.

Program Director Dien says it's an uphill battle convincing advertisers that rupiah-for-rupiah, radio is a more effective advertising medium than TV. She says on the rare occasions that they forget to switch over to government-mandated live rebroadcasts of RRI, she gets a call from the Biro Panawas Radio, the Radio Inspection Bureau, with a query about what's going on, so apparently someone's still listening and checking up on every single station. (On our way over to the station, RRI began broadcasting a presidential speech, at first, only five of our car radio's twenty FM stations carried it. By the time we arrived a half-hour later, ten were carrying it. An hour later when we departed, all were carrying it.) Trisakti gets around the restriction on non-Indonesian-language programs by saying their regular English-language hour is instructional. The morning phone-in show's number of calls jumped from about ten per day to over 40 when the political turmoil of this year began and has stayed high ever since. Deutsche Welle gave the station reception equipment to receive DW programs from satellite, and they rebroadcast packages which differ in some way from what they can produce themselves using information from the Internet—for instance, on science, or on lifestyle.

Dien says the most important needs facing private radio right now are an improved legislative framework, highly practical training for staff (the PRSSNI's seminars are

too general, she says), and equipment for news production. Better use of the Internet would be helpful too, Tisakti does not know how to download audio files for use over the air, for instance.

Yogyakarta

Yogya, as it is known, is the cultural center of Java, the island on which 60 percent of Indonesia's population lives. The three-million-person metropolis is a thriving mixture of tourism and educational institutions. Radio Bikima is one of the four stations that have positioned themselves as news-oriented. Like most private radio stations in the country, Bikima was founded as a family hobby operation, but it is now part of the Kompas (Sonora) group. A few years ago it moved from the AM band to FM. It now operates its own building with a powerful transmitter reaching across all of central Java. The frequency license on their wall is for 100W, although like almost all stations their transmitter is significantly stronger—about three kilowatts. However, also like many stations, they do not operate it at full power now, to save electrical costs. The rather unreasonable, official but always-violated limitation of 100W provides an easy way for the government to close a station should it so wish.

Because they have little equipment on which to produce news, most of their local news is "insertions." Their six reporters rove about the city in search of news, each calls in regularly from a cell phone and is patched live on the air to provide a bulletin of what's going on throughout the day. But they believe listeners do not want an all-news channel, so about two-thirds of their airtime is filled with music.

At Universitas Gadjah Mada (UGM) in Yogya, there are three student-run "pirate" radio stations, all very low power, all using homemade transmitters. The students report that when they inquired of the government as to whether they could broadcast (first in the mid-1980s) they were told probably not, but that they should apply in writing. They reasoned that since the law requires licensing of government-run and commercial radio stations, and they were neither, they were not required to license. So fearing a refusal, they simply didn't apply. So far, they have trusted the university administration to run interference for them. During times of social unrest, they say they co-ordinate student activities on campus, including demonstrations.

When driving about town we saw some students taking part in what appeared to be a demonstration. When we asked, it was explained to us that it was orientation week, and all students are taught how to demonstrate. Further inquiries found this to be true at most of the more socially active schools in the country.

In Wates, a distant suburb of Yogya, Radio Andalan Muda is a classic example of community radio. With a small AM transmitter, the station plays predominantly dangdut music (a domestic genre popular with less-educated and less-affluent audiences). They consider their target audience to be farmers, and work with the Department of Agriculture to distribute information on better farming techniques over the air, and they also cooperate with the health service on health-related messages. The station cannot afford CDs and uses only analog cassette tapes. Several staff do look for local news, and if the station determines an event worth live coverage, they use an (unlicensed) homemade portable FM transmitter to backhaul the signal to the station for rebroadcast over their 500W AM transmitter. (Just as stations routinely exceed the 100W maximum licensed transmitter power for FM, so do they exceed the maximum 250W AM signal power.)

In addition to many universities, Yogya is home to several training centers for media professionals such as LP3Y, which conducts courses for print journalists but looked broke. YMLPAV (Mandiri) provides lively short courses on radio and TV reporting for local youth. The MMTC is the government's national training center for State TV.

employees Fred Wibowo's Puskat is a retreat center for various NGO conferences including audiovisual training

As Indonesia's second city, Yogya provides a glimpse at the upper end of Internet connectivity outside of Jakarta. The five pipes into the city serve a total of about 2000 people (including the several universities with access), with a total of about 576 Kbps in capacity

In Yogya, we also encountered our only cable TV system outside of Jakarta. Granted, it only has four houses hooked up, but Mega Infrabumi has large plans. By their calculations there should be up to 100,000 families in the city affluent enough to afford the \$10 monthly fee they expect to charge for full service, and up to 300,000 more who would pay \$1.50 for basic service. They have reached agreement with the power company to run the cables alongside the electricity lines. True, they did have to retrench as a result of the economic crisis and find cable that could be made mostly out of domestic parts, to minimize dollar costs.

Radio Retjo Buntung believes that though their audience is primarily interested in music—their DJs spin about 70 percent foreign music and the rest domestic, almost all on audiocassette—their listeners want some news too, particularly local information. So they broadcast local news three times a day, they also rebroadcast small (five-minute) excerpts from the BBC and DW's Indonesian Service bulletins, and they cooperate actively with the VOA. And they have an innovative agreement with SCTV to simulcast their 18:00 news in exchange for a crawler on SCTV's local screen advertising their radio station. Director Timuti says that at that time news junkies usually find others in their family watching a soap opera on another station, "and besides, you don't lose anything by not seeing the picture." Ad revenue is down some 60 percent from two years ago but by reducing costs to a minimum the station is breaking even.

Surabaya

As the country's third-largest city, all six national networks have local retransmitters in Surabaya. It was the home of SCTV, which when it started to go national in the early 1990s was "encouraged" to move its headquarters to Jakarta. SCTV kept its Surabaya studio producing for the local and national markets, the only source of local programming outside of Jakarta, until the economic crisis hit the advertising market so hard that the Jakarta HQ ordered it closed and all resources moved to the capital. That move will be completed in the last quarter of 1998, most of the local staff of 300 have been laid off. A bureau will remain. SCTV's spokesperson Dimi Rahim says they have been flooded with local calls asking them to stay in the city to support local programming. But one senior manager commented, "The incomes here in East Java are lower. Yes, Surabaya is a big city, but people live a lot more simply than they do in Jakarta. There just wasn't the money to support a national station all the way down here."

Surabaya's private radio scene is lively, with as many stations as any other city in the country, save Jakarta. At least five stations stake claims to be "your news source." The best known is Suara Surabaya, which is very active in PRSSNI and whose manager is the association's East Java chief. SCFM is another, part of Peter Gontha's SCTV conglomerate. Others include Radio Merdeka, Radio Wijaya, and the Susana Group.

The Akademi Wartawan Surabaya (AWS, or Journalism Academy of Surabaya) is a small private institution that aims to bring young university-age students into the radio and television industry. Ironically, though the institute concentrates on broadcast journalism, it is primarily financed by local newspapers such as the

Surabaya Post This is attributable in part to the dire financial straits that broadcasting organizations find themselves in and the traditional belief that print and broadcasting skills are "interchangeable"

AWS has just one editing suite, and course instructors teach on a guest lecturer basis, with most of the instructors working in the local broadcast media The luckiest of the 100 or so students are invited to intern at local broadcasters Suara Surabaya's director, one of AWS's lecturers, says, "The best thing for the school would be their own little radio studio Students could get the practical experience they need There is no such thing here, so young people really rely on theory and print [newspaper] influences" AWS provides a certificate which augments a communications degree from the University of Airlangga (UNAIA) or UniTomo (Dr Soetomo's University)

Because of an increase in the cost of paper, Surabaya's largest daily newspapers (there are six) have had to decrease the number of pages they print, but increased readership has resulted from the heightened pace of change in the country

Bandung

Only several hours from Jakarta, Bandung houses the country's premiere scientific educational institution, the Institute of Technology (ITB) ITB has secured from the a Japanese a 1.5-Mbps Internet channel and has set itself up as the hub of university networking in the country—roughly half of the 50 or so institutions on-line acquire access from ITB Many used VSAT technology at first but the economic crisis has made land lines far more economical and most have switched ITB's Internet team is clearly the country's leader, and any Internet project undertaken in Indonesia should be sure to tap, if only as an advisor, the encyclopedic knowledge of ITB's Internet chief Onno Puibo Puibo is the author of a summary of the Indonesian government's national information infrastructure project, Nusantara-21, including the contributions being made to university connectivity by the Canadian development agency CIDA

At least two stations have staked out the news market, Radio Mara and Radio Oso Mara, like Bikima in Yogya, is headed by a woman, and in Indonesia's male-dominated world, a successful woman is a talented person indeed Layla is one of the most active directors in PRSSNI, and in addition to news her station produces a number of regular talk shows which garner them a secure audience of "young mature" adults Until recently they had a hard time covering costs because advertisers were afraid of being associated with the station's reputation as subversives, but now they are able to cover their costs with revenue It's clear Layla is among the early adopters of information she gleans in seminars, and her ad department bears this out, she says the economic crisis has not substantially affected her revenue

Sumatra

Palembang

This city of 1.5 million retains a strong provincial flavor, with two- and three-wheeled transportation dominating the roads It is Sumatra's second city, with two quality daily newspapers and at least 15 radio stations Radio Atma Jaya, a former Catholic station which is now commercial, tries hard to get news on the air, and in this effort is helped by Jakarta's Radio Sonora Sonora (part of the Kompas media conglomerate) bought a controlling share in Atma Jaya several years ago and feeds to stations in its group excerpts from the Reuters feed it buys They also aggressively court contacts with foreign stations every morning at 05:30, for instance, VOA calls them up and plays its daily half-hour Indonesian-language feed over the phone, which Atma Jaya records and then plays back over the air during the course of the day in bits and

pieces. They also broadcast feature programs that the BBC produces (in Indonesian) and sends to them every month.

Like many other stations we visited, Atma Jaya keeps track of everyone who's ever called in to the station—21,349 to date. They recently computerized this card catalog, and use the data to know who's listening. Ads cost about \$1 per spot, a figure which is about average for a provincial city. (We found that stations generally quoted a rate of about \$3 or \$4 per spot, but few were able to actually get that much.) Ad sales have plummeted in the eighteen months since the economic crisis hit.

One of the two Internet providers in the city, Meganet has 200 subscribers and charges about \$5 for a monthly subscription that will get you 20 hours of dial-up IP. Meganet has a 64Kbps leased line to Jakarta. The company's owner estimates there are perhaps 1000 computers in the city. From ten to twenty new subscribers sign up per month. The other provider is the Wasantara-Net.

Medan

The capital of Sumatra, Indonesia's second most populous island, and the fifth-largest city in the country at about two million, Medan is a relatively cosmopolitan place by virtue of its proximity to Malaysia. When the weather is good, in fact, Medanese can watch Malaysian TV. Medan has two lively daily newspapers and twenty private radio stations.

Several radio stations have staked out the claim to providing news to the city. One, Propanca, is remarkable in that it is the only station we visited in Indonesia that has gone totally digital, all recording is broadcast from a dedicated RTS computer system. Propanca also was a pioneer in representing itself over the Internet and even tested out a live audio feed, but because of the economic crisis, has discontinued it. There are about 30 employees, including a well-organized ad department. The reporter is one of the rare radio journalists in the private broadcast sector who actually heads out each day to acquire source in order to produce two or three edited packages which air at 17:45 daily. Talk shows, too, are popular, but the station's dominant format is clearly music.

The most interesting radio news in the city is provided by KISS-FM, also a pioneer on the Internet and the most active station on the news front. Unlike Propanca, KISS aggressively searches for news, both national and international (on the Internet) as well as local, with several local reporters who scour the region for interesting information. The station does not yet have a proper news department but it is clearly positioning itself to become the information source of the city. KISS also manages two other radio stations in the city which have become unprofitable due to the economic crisis.

Because it is one of the largest cities in the country, Medan has an advertising sales representative for RCTI, the largest private national TV network. And like only two other cities in the country, in Medan an advertiser can buy advertising that will run only on RCTI's local transmitter. But although (as in most of the country's major population centers) RCTI has one local correspondent covering local events, there is no locally originated programming.

Banda Aceh

The smallest of the cities we visited, Banda Aceh's population in the statistical yearbook is about 375,000, but like most of the cities we visited, rough calculations from the air estimate its size as no more than 3/4 of that. But Banda Aceh's importance lies not in numbers. It is on the northwestern tip of Sumatra (and therefore

of Indonesia) and is called the “verandah” of Islam in Indonesia. Indeed, the percentage of women wearing the traditional white Muslim scarf is higher here than elsewhere in the country. It is by no means a hotbed of fundamentalism. It is, however, home to a different ethnic group, one on which the mantle of Jakartan control rests uneasily, and the Indonesian military has used vicious measures to suppress the Acehans’ desire for more local control over resources and civil service. While we were there, human rights groups were uncovering the unmarked graves of hundreds who had been disposed of by the military in the last 20 years.

BA has one Internet provider: the government’s Wasantara-Net, which claims 115 subscribers. Local telephone numbers are five digits. The city lies at sea level and is often subject to flooding (it was flooded during our visit). The residential section of town is festooned with antennas, including the towers of the nine private radio stations. Most operate out of the back room of someone’s house and are clearly shoestring operations that make no money to speak of and operate on volunteer labor. There is very little local advertising, stations report selling only several ads per day. In fact, the larger number of their ads are run as part of their membership dues to PRSSNI, which every month accepts a couple of large ad orders from a company such as Stimol and requires all members to broadcast these ads several times per day.

Radio Saya, as well as another station in town, gets daily calls from VOA and patches the Indonesian Service’s half hour of programming directly onto the open air. But the dominant broadcaster is Radio Flamboyan, which is the only one that makes any serious attempt at providing news, though they are the first to admit that they do not have the resources to do proper reporting. They used to have an arrangement with the local daily newspaper to, in the evening, read the headlines of tomorrow’s paper, but the newspaper felt it lost business this way. All of their news comes from the Internet and from the newspapers. They have never heard of ISAI, or AJI, or FOWAR. The station reportedly cost about \$70K.

The local PRSSNI chapter head tells us that there are too many radio stations for any of them to make a profit, yet more want to get started. A would-be broadcaster must receive a recommendation from, among others, the local PRSSNI head in order to apply for a license, and this one, echoing what we’ve heard in other cities, tells us he refuses in order to prevent the further dilution of the already fragile ad market.

The head of the computer department at the largest university in town showed us his lab, with 15 PCs and an Internet connection. He says their provider has announced that their Internet will be shut off next week for non-payment, and he’s trying to get the university administration to realize the importance of connectivity, though he’s not optimistic. (In the event he is successful, and disconnection is postponed for at least a few months.)

The local amateur (ham) radio club director says he has 800 members. Their range is up to about the other end of the archipelago (about 6000 km). Throughout Indonesia, he says there are about 800,000 members, and although reticent on the topic, he says members do of course use the system to relay information around the country in times of crisis. But he emphasizes the network’s utility for search-and-rescue operations when an accident of some sort takes place, particularly out in the straits between Sumatra and Malaysia.

Kalimantan

Banjarmasin

Newspaper vendors report sales are down because costs are up and salaries are down. RCTI and SCTV are popular but the lack of local programming means people turn to

morning radio for their local news. However, the ad base is thin, and station owners say things have never been as financially dire as they are right now. The family-run stations are living off their savings.

DBs Radio is typical of most local private radio stations. Soley Limantara bought his house in a residential section of town in 1969 and started an AM radio station. Following the trend, in the late 1980s he switched to FM. The one-room on-air studio has a CD player, three cassette decks, a microphone, a hybrid telephone, and a control board. A second studio with two cassette decks is used for production of advertisements. A stack of broken reel-to-reel equipment litters the corner. All 14 employees are part-time, and most are volunteers doing it for the fun of it, since the station really only needs one person to play the music. According to FSA data cited in a December 1997 edition of *Cakram*, a radio magazine, DBs has a steady twenty percent market share. Until August, DBs had been buying the MTV Asia Hit-list from Jakarta's Hard Rock FM, but couldn't afford to continue. So Soley contacted MTV directly and is negotiating for the right to rebroadcast directly off of satellite—onto his radio station.

In 1997 the station didn't break even, but it was close. Levi's and other clothing and cosmetics vendors were interested in reaching the station's "young, hip and socially conscious elite." But the economic crisis has seen revenue plummet to one-quarter of its previous level, and it has not bounced back. Soley has begun to sell chunks of his airtime to Jakarta-based Piambois Group and Masima Radio and ad agency Cita Lintas to keep afloat, earning an extra \$30 per month, enough, he says, to pay his staff. In this way Jakarta radio stations can sell national advertising, claiming it will run on their "affiliates" in cities across the country.

Soley would like to acquire a computer and Internet access to download music information and, perhaps, music. "The station costs about two million rupiah [\$200] per month to run. That means I can only sustain this kind of pattern for a little longer before we have to shut down."

Soley attended a PRSSNI-organized training in December 1997 and says he "learned a lot about radio production." Now, in preparation for the next round of training, Soley is registering with the local government's Political and Social Department. Why? The PSD "is related to radio, they provide guidance to us. They are also involved in media monitoring to make sure that market segmentation and reporting of stories are clear and fair. They monitor the news reporting especially."

Sabilal Muhtadin FM is classified as "amateur radio," which is not allowed to accept advertising. Amateur stations are exempt from some of the standard media regulations, such as the ban on strictly religious format. SM is Islamic and plays religious music as well as the ritual call to prayer five times a day.

Nusantara FM also has about twenty percent market share, but instead of targeting one market segment, they provide an eclectic variety. The morning show provides news and adult contemporary music. Then they do a complete turnaround and provide dangdut, then easy listening, then nostalgia, then rock. Like many stations, they have occasional talk shows for callers to unload their problems and get advice. All news comes from the national newspapers, which they get by going out and buying the papers, then selecting what to read. They view this as a public service since few can afford to buy the newspapers. They used to have a computer with Internet access but had to sell the computer to pay the bills.

The more dynamic DJs run quiz shows with a variety of small prizes such as cassette tapes. The telephone lines are often ringing with feedback, although the dialing touchpads on the phones are locked with a padlock because the owner cannot afford to pay for outgoing calls. The Jakarta firms that used to send music cassettes no

longer do so. They say they cannot afford to pay royalties in order to have the tapes, so DJs must become proficient at mixing the same old tunes to come up with new and interesting sounds. These skills form a foundation for skilled radio professionals.

Were it not for the location, the station would have looked like a small college radio station in mid-America. The fifteen employees are mostly young volunteers to whom Yanto, the owner, pays a small stipend when he can afford it. The students proudly announced that they keep the station alive because they ask little of it. When there was ad revenue, announcers earned \$10 per month.

Smart-FM is unique because it is a newcomer to the radio market. Smart broadcasts on the same frequency in most of the country's major cities, in some cases they bought out an existing station but in Banjarmasin they created a brand new station in September 1997. Smart aims for yuppies. The network's owner Fachry Mohammad is an innovator who believes that by being more nimble and, yes, smarter, he can beat radio stations that have been in the market for thirty years or more. The station has quickly won over listeners and advertisers. Local advertising demand has been rising in recent months to recover from the dramatic low shortly after the May riots, reaching \$300/mo when we were there. The biggest advertisers are Nescafe, Telkom, and Satelindo (the latter two telephony service providers). Advertisements go on the air directly from a computer, the same one that keeps the playlist. Even high-tech Smart, though, still uses a mixture of CDs and tapes for its music, CDs are still relatively expensive. The compressors, faders, limiters, and other new accessories in the production room seem to go largely unused except by the couple "we learned by doing" jockeys.

Smart is the only station in the city that makes a real attempt to go out and cover local news on its own. Generally two to three staffers are on journalism duty at any given time but up to seven can be deployed in case of need, full-time staff are paid about \$12/mo. They strive to cover local events by calling in to the studio and going live with their mobile phones. Journalists have no proper field recorders, though station manager Budi Widodo hopes they will eventually be able to afford them, and when they need to interview they use a consumer-grade Walkman. Most of Smart's local news is "spot" coverage of fires and accidents, though Budi would like his staff to gain the ability to generate more news and produce investigative longer-format pieces on important local issues. The city is the commercial and trading center for a large area of Kalimantan, so there is ample need for reporting on broader environmental, social and political issues. In mid-1998 they arranged for staff from the World Wildlife Fund to speak on the air about the situation in Kalimantan. Local and regional government officials rarely turn down the opportunity to be grilled by callers on the morning talk show, and competitors have followed Smart's lead and started morning news talks shows. Until recently, the pervasive "telephone culture" meant that station management would receive calls advising them of what to cover and what not to. Smart reports this has ceased.

Smart's CoolEdit-based computer editing equipment and able staff can turn around radio spots far more quickly than other contenders who are editing with tape decks. A second computer downloads today's newspaper via the Internet (the printed papers are usually a day late), and a scriptwriter culls through to summarize events for the radio news program. But the computer jocks have no idea how to use the Internet to search for background material.

Smart's wish list of what a radio fairy could provide includes the following:

- 1 international radio journalists to train local employees
- 2 professional post production on existing digital equipment
- 3 good script writing, how to write for news and for announcing
- 4 professional announcing/reading and live studio production
- 5 professional reporting equipment and the training to use it

- 6 a motorcycle to travel to stories
- 7 advertising and sales techniques
- 8 CD music

Sulawesi

Ujung Pandang

TVRI and RRI have recently expanded their operations here, increasing news capabilities and staff and converting from analogue to digital service, a surprising move given the general economic hardship media across the region are facing. However, in UP our search for local investors who might be interested in starting local TV stations bore fruit and we did find interest in applying for a license. We will keep close contact with similar parties across the country but it is likely to be a year or more before such efforts get on the air.

The attitude that the media need to "wait out the storm" of the economic crisis because sunnier days will eventually come is being replaced by a gloominess about the future of radio stations here. Rumors abound of impending takeovers or shutdowns of stations, though it has been almost three years since three stations closed because they were not financially viable. Today there are fourteen radio stations in the Ujung Pandang area, of which three have decided to make news a priority in their broadcasting.

Radio Mercurius is the most advanced in its news coverage, but they have no field reporting or editing. The economic difficulties have forced a staff reduction from 24 to 15 and a per-spot price drop in ad costs from \$4.50 to \$1.50. An Internet link helps them check out entertainment news and pull down newspapers and news from Antara for distillation to their hourly news bulletins. Their home page brings in a little contact from listeners and potential advertisers, they acquire Internet services by barter. They edit their ads using antiquated reel-to-reel technology.

SPFM is typical of Indonesia's small family-run radio stations, but with a difference. Instead of the generic emphasis on pop music or dangdut, SPFM concentrates on women, although the owner admits that most of his employees are men because few women have entered the radio market. SPFM has four working journalists who are assigned "rounds" by telephone, finding out information they can use on their shows, but they too have no equipment to do field reporting.

SPFM has been warned to avoid covering the problems surrounding anti-Chinese rioting, with rules against inciting violence cited as the justification. Two other station owners of Chinese heritage insisted they would not report ethnic Chinese issues on their stations for fear of reprisals not just from the authorities but also from the local people themselves. The irony of a main street scattered with Chinese Buddhist temples, Chinese ceramic antiques stores and Chinese restaurants is not lost on a visitor who is hard pressed to hear anything about the population except those of Muslim background.

The law school at UP's largest university has taken an unusually active role in media law issues and instructors teach special courses about journalists' rights. Professor Abdul Muis is considered one of the country's foremost scholars on media law issues. He has been asked by DepInfo to participate in the process of drafting new media legislation, and is a regular contributor to conferences and compendia about media law in Southeast Asia. His weekly column on freedom of expression issues in the local paper has contributed to a certain feeling of openness on the media scene in the city.

Manado

The Manado Post has been at the forefront of exploring environmental problems which affect the local fishing and farming industries, ranging from runoff from mines to over-application of pesticides and sub-optimal agricultural practices. Generally, the print media are the most aggressive in providing investigative journalism, while broadcast media pick up on a story later. Yet even the Post hesitates to touch upon sensitive subjects like human rights abuses or issues associated with indigenous peoples or the ethnic Chinese. Reporters report that they still get telephone calls from those in the government who follow the media's work with "suggestions" about what to cover—or not cover.

Three radio stations have been laying claim to being the information providers of choice for Manadons, SOL, Memora, and the upstart Smart-FM. All three lack skills and equipment and so each is searching for ways to jump into the news market. Memora is looking into broadcasting ANteve's entertainment news, and it has started producing a morning "women's issues" program daily. Smart has dived right into the deep waters with the Smart Morning Post every morning, with no equipment, the program consists entirely of scripted news bulletins and a few voice-overs. Reporters call in with live bulletins using their mobile phones, lending the program a talk-show aura. One novel tactic involves providing air time in the morning to a party mentioned in yesterday's Manado Post headline story. The computer with Internet dial-up capability is in the director's office, however, so journalists can't use it for research. Smart has been talking with ABC about receiving programming for rebroadcast.

Two Internet providers, Meganet and Wasantara-Net remain, the third, Indonet, closed its doors because of a lack of business. Meganet employees pointed out that one of the difficulties in the Internet market is the still overweening state regulation that, for instance, establishes minimum and maximum prices they may charge.

The local Sam Ratulangi University has a communications department but the curriculum focuses on theory and emphasizes print journalism.

Irian Jaya

Jayapura

Jayapura is the capital of Indonesia's largest and most sparsely populated region, and among the most troublesome for Jakarta. The indigenous peoples consider Indonesia an occupier, one that takes the area's bountiful natural resources but provides little in return. Jakarta's policy of encouraging immigration from overcrowded Java also annoys the tribes that live here. East Timor is likely to vote, in a referendum in later 1998 or early 1999, for independence, and will probably be allowed to go its own way, but East Timor is relatively unimportant to the country, whereas Irian Jaya's resources provide a large proportion of the Indonesia's export earnings. Irian Jaya is the only region in the country that is predominantly Christian.

Because Jakarta views Irian Jaya as rebellious, control over the independent mass media is considerably tighter here than in most of Indonesia's cities. Unlike in the other regions we visited (including also-troublesome Banda Aceh), a tight censorship regime continues to exist. This policy is enforced not so much by censors standing next to the microphone and printing press as a knowledge that any deviance from official policy, any coverage of touchy subjects, or any controversial moves such as broadcast in a local language will result in retribution. Such retribution is likely to mean the end of the medium's existence. Here issues of SARA continue to be absolutely taboo. With respect to media, the language issue is a particularly explosive one.

The shantytowns and huts in the village clusters that pass as the city of Jayapura all have TV aerials, and a high proportion have satellite dishes in the back yard. Dish penetration is high because the private networks—alternatives to relatively boring TVRI—have not rushed to make their signal available terrestrially, even now, of the five national private stations, only RCTI has a local retransmitter. Neighbors will often share the signal from a dish, each with their own receiver, to see the other four channels.

RRI has undertaken a national project to upgrade its satellite relay facilities from Jakarta to regional retransmitters from analog to digital and to install radio uplink facilities at selected regional capitals to provide for backhaul capability. The planning and installation work has been contracted to an Australian company, Comsys Pty. The upgrade should increase the reliability and quality of RRI's broadcast facilities. Plans also exist to distribute Jayapura's regional state radio channel around the vast province via satellite, which involves installation of an uplink as well as of a series of downlinks attached to new transmitters.

The local TVRI affiliate in Jayapura, in the suburb of Sentani, put their first locally-produced programming on the air while we visited, a half hour of local music. Managers had come in from Java and Sulawesi to train local staff in TV production using the two new Betacam SP editing suites. Senior staff explained that local journalists needed much more training before their programs could be allowed on the air without approval from Jakarta. The new station's staff number 18, an expansion from the previous small news bureau, and a journalist evinced optimism that at last "we will be able to produce our own programs that people want to watch." There was a differently-faded spot on the wall where Suharto's portrait had been removed.

Local reaction to the first local programming was tepid. A member of an audience watching a television for sale in an electronics shop said, "People died in Irian Jaya today in clashes between two tribes, the army was involved, and we don't hear anything about that. We get this instead." "The only news is from Jakarta, a whole world away from us here." But another person noted that at least now there would be some local programming and, with time, it might come to respond to local needs.

The opening of a full-fledged TVRI affiliate in Jayapura follows similar moves in Manado and Ujung Pandang over the last eighteen months, and dovetails nicely with Jakarta's new policy of ever-so-slight decentralization in governance.

All five official private radio stations in the region are registered as "amateur," a designation which results in a ban on transmission of news or other "information." Most are supported by Christian religious denominations and say their goal is to broadcast goodwill and proselytize. All are extremely small, using audio cassettes decks as sources and soundproofing their one room with rubber foam. Several other stations are technically pirates, broadcasting without a license, and they cited "difficulties with the authorities" as well as a lack of finances as the reason for not having registered. Stations must put up a bond upon applying for a frequency license—a sum which is laughably small if converted into dollars because of the country's exchange rate difficulties but which still represents a substantial chunk of assets for a family radio station.

The only ISP in town is the government one, Wasantara-Net, and it claims 378 users, although our experience is that less than half of those who have "registered" are active users and pay monthly fees. The ISP's management says they have five to ten daily connections from university students, tourists, and businesspeople. The minimal use is easily explained by the cost, the minimum monthly fee is about \$5, roughly a third of the local average salary for a journalist. In addition, there are few computers in the city, and even fewer modems. To complicate the situation, indigenous Jayapurans tend to look at Jakarta as an adversary and therefore can be forgiven the

assumption that any information flowing through a state-controlled Internet provider is controlled or at least monitored. Suspicions were also voiced that the lack of other ISPs was probably intentional, although it seems clear the reason is more prosaic: it is unlikely to be profitable.

CONCLUSION

We present our recommendations in summary form at the beginning of this document. We would like to repeat our suggestion that anyone wishing more information about the Indonesian media contact the authors with specific questions. To say the situation in Indonesia is in flux would be an understatement, but at the very least it would be easy to share contact information about key players in the media field.

Here we would like to note only that the current "reformasi" atmosphere in Indonesia in the third quarter of 1998 is heady. By moving quickly to encourage the free media that have so boldly asserted themselves in the last few months, foreign assistance providers have a real opportunity to reverse some of the ill will generated among Indonesians by the West's tacit support over the last thirty years for Suharto's less-than-democratic policies vis-à-vis civil society. We hope that this document will help convince prospective aid providers that relatively small investments in projects to improve the media's news-gathering capacity could provide immediate and rather dramatic results in a country which is a pioneer in trying to make the transition from crony capitalism to market democracy. This call is the more urgent given the approaching parliamentary and presidential elections slated for mid and late 1999, elections which can fulfill at least part of the promise of true democracy only if held in an environment of a vibrant, independent, and pluralistic media landscape.

END