

The Development of the Broadcasting Ecosystem in Indonesia, Evaluation of Media Policies, and Industry Adaptation to New Technologies

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ABSTRACT (10 PT)

This article analyzes the transformation of Indonesia's broadcasting ecosystem by evaluating the responsiveness of media policy and examining industry adaptation to new digital technologies. The study is grounded in observed tensions between traditional regulatory paradigms and the accelerated shift toward convergent, interactive, and multiplatform broadcasting practices. A qualitative policy study was adopted, supported by in-depth interviews to obtain nuanced insight into regulatory substance and practitioners' experiential knowledge. Empirical data were collected in Jakarta, selected because it is the national center of broadcast regulation and the primary locus of media industry concentration. Four informants were purposively selected a senior national regulator, a digital strategy director of a private television network, a content manager of a digital media platform, and a representative from a broadcasting industry association based on their strategic involvement in digital transformation processes. Findings indicate regulatory adaptation lags behind industry innovation, revealing policy gaps that both hinder and stimulate opportunities for content development. The study recommends adaptive regulatory reform, enhanced collaborative dialogue, and continuous support for local content innovation to strengthen a sustainable broadcasting ecosystem.



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INTRODUCTION

The broadcasting system in Indonesia is undergoing a profound transformation alongside accelerated media digitalization and the expanding use of internet-based communication technologies (Asri 2023). This shift extends beyond technical changes in production, distribution, and content circulation, influencing a broader set of social, economic, and regulatory dimensions. Audiences increasingly consume media through networked, mobile, and interactive platforms, while traditional linear broadcasting continues to lose dominance (Pamungkas et al. 2023). Simultaneously, industry structures have evolved toward a more convergent and cross-platform environment in which television, digital streaming, telecommunications, and social media intersect (Zhang et al. 2023). These changes reshape relationships among the state, markets, media institutions, and citizens, requiring regulatory arrangements that are responsive to shifting technological and industrial realities (Monetalarosa 2024).

Digital technology has enabled Indonesian broadcasters to adopt multiple innovations, ranging from online streaming channels and social media integration to over-the-top (OTT) services designed to reach segmented and mobile audiences. Traditional broadcasters increasingly incorporate multiplatform strategies to sustain audience engagement and maintain market competitiveness (Zhang et al. 2023). Content distribution no longer relies solely on terrestrial broadcasting infrastructure; rather, digital ecosystems allow media firms to experiment with algorithmic recommendations, targeted advertising, and interactive content delivery models (- and Suranto 2022). These developments reflect a significant economic transformation, altering revenue streams and intensifying competition between domestic broadcasters and transnational digital platforms (Anon 2023).

Despite this rapid transformation within industry practices, national broadcasting policy in Indonesia largely retains the conceptual separation between conventional broadcasting and digital media (Onwubere and Osuji 2024). Regulatory instruments remain grounded in legacy paradigms

developed during the analog era, positioning broadcast frequencies as the core regulatory object and emphasizing control over spectrum scarcity (Asri 2023). As digital convergence dissolves traditional technological boundaries and multiplatform distribution erodes conventional gatekeeping mechanisms, tensions emerge between policy frameworks and industry realities (Aisha 2023). The policy–practice mismatch raises questions regarding regulatory relevance, institutional capacity, and the ability of existing frameworks to sustain public interest objectives, particularly media diversity, equitable access, and cultural integrity (Anon 2025).

The challenge of aligning regulatory frameworks with technological change is not unique to Indonesia. Global research highlights that many governments struggle to keep pace with innovation, particularly in the digital audiovisual sector. International literature demonstrates that digitalization blurs the distinctions among broadcasting, telecommunications (Ali 2023), and digital services, rendering rigid, medium-specific regulatory approaches increasingly ineffective. Scholars argue that adaptive and cross-sectoral regulatory models are essential to govern convergent media systems, facilitate innovation, ensure fair competition, and safeguard public interest values. Regulatory evolution therefore requires collaborative processes among policymakers, industry actors, and civil society stakeholders (Sheperd 2023).

Previous research in Indonesia has examined specific digital broadcasting issues, such as the analog switch-off (ASO) process, audience behavioral transitions, and the economic implications of digitalization for media actors (Priyadharna 2024). These studies provide valuable insight into the technical and socio-cultural aspects of digital transformation. However, most analyses remain fragmented, focusing on either technological migration, policy frameworks, or industry strategies, without systematically linking these elements (Kuzmina and Kuzmin 2024). Few studies integrate regulatory evaluation with empirical assessments of industry adaptation and strategic responses to technological disruption. This gap limits understanding of how policy and industry interact and co-evolve in shaping the emerging broadcasting ecosystem (Pecheranskyi 2023).

Indonesia's legal foundations for broadcasting involve several regulatory frameworks that express state responsibility over media governance. Law No. 32 of 2002 on Broadcasting outlines the functions of broadcasting in strengthening national identity, promoting public education, and supporting democratic discourse. The law also establishes principles for national broadcasting system management, delineating the responsibilities of state institutions, industry actors, and the public (Lubis and Sazali 2025). More recent legal instruments, including Government Regulation No. 46 of 2021 concerning digital broadcasting implementation and the presidential regulations defining the mandate of the Ministry of Communication and Informatics, provide further direction for digital migration and regulatory authority (Handiriono 2023). While these instruments signify normative commitment to digital transformation, implementation remains challenged by institutional constraints, regulatory overlaps, and limited coordination among government agencies and industry stakeholders (Prilani and Hakim 2023).

The core research problem concerns how Indonesian broadcasting policy responds to technological change and how industry actors adapt within the regulatory frameworks currently in place (Aisha 2023). Digitalization offers opportunities for content innovation, decentralized distribution, and expanded public access. Yet it simultaneously introduces risks and disruptions, such as unequal competition between local broadcasters and global digital platforms, jurisdictional ambiguity over digital content regulation, and potential marginalization of community or regional broadcasters (Adhikarya et al. 2025). Broadcasters face pressure to restructure organizational systems, upgrade technological infrastructures, and redesign business models, while regulators confront demands to modernize policy frameworks to remain relevant in a convergent media environment (Prilani and Hakim 2023).

The research gap emerges from the limited availability of comparative analyses connecting Indonesia's digital broadcasting policy trajectory with industry adaptation strategies and international regulatory developments (Ernawati, Irawati, and Novandalina 2024). Existing research seldom interrogates how policy frameworks influence or constrain industry digitalization in practice. As a consequence, there is insufficient understanding of reciprocal relationships between policy reform,

technological adoption, and industrial restructuring (Handoko, Israwan Setyoko, and Kurniasih 2023). Addressing this gap requires integrating regulatory analysis with empirical perspectives drawn from industry actors who navigate digital transformation on a daily basis (Suhaimi, Lianingsih, and Pirdaus 2024).

This study proposes an analytical approach that combines policy analysis with qualitative inquiry, specifically through in-depth interviews with practitioners in strategic regulatory and industry roles (Ari et al. 2022). This design makes it possible to explore policy substance, evaluate implementation challenges, and identify empirical patterns of industry adaptation to technological change. By situating Indonesia's experience within a broader comparative context, the study seeks to contribute new insights into the governance challenges and opportunities arising from convergent media systems (Ari et al. 2022).

The research questions guiding this investigation are: (1) How have broadcasting policies in Indonesia evolved in response to digitalization? (2) In what ways are broadcasting industry actors adapting to new technologies within existing regulatory frameworks? and (3) What implications do regulatory–industrial misalignments pose for the sustainability and competitiveness of the national broadcasting ecosystem?

The objectives of the study are to critically examine policy transformations in Indonesia's broadcasting sector; analyze industry adaptation strategies in response to technological innovation; and identify regulatory gaps that hinder digital transition (Gawel 2025). The study also aims to formulate evidence-based policy recommendations to support adaptive regulatory reform, foster collaborative governance, and maintain public interest values in an increasingly digital broadcasting environment (Abdullah 2020).

The theoretical contribution of this study lies in advancing scholarship on media governance and political economy of communication in the digital era, particularly in the context of emerging economies (Jin 2024). Practically, the findings are expected to provide actionable insight for policymakers, regulators, and industry actors in designing policies and strategies aligned with technological realities and societal needs (Prihanto 2022). Acknowledging limitations, the research focuses on policy analysis and interviews with selected industry informants, which may restrict generalizability across media subsectors (Ritonga, Farid, and Manda 2024). Rapid technological shifts may also alter the landscape beyond the study's temporal scope. Future research should therefore expand methodological approaches, incorporate audience perspectives and global platform governance, and adopt longitudinal designs to deepen understanding of Indonesia's digital broadcasting transformation (Ibrahim, Hidayana, and Saefullah 2024).

RESEARCH METHODS

This study employed a qualitative research approach to generate an in-depth and context-sensitive understanding of the evolving broadcasting ecosystem in Indonesia and how it intersects with policy evaluation and industry adaptation to technological innovation. Qualitative inquiry was deemed appropriate because the complexity of broadcasting transformations cannot be sufficiently captured through quantitative measurement alone (Yurdigül and Ayaz 2025). The transition from analog to digital broadcasting involves social, political, and economic processes that are deeply embedded in institutional arrangements and industry practices. Such dynamics require interpretive methodological strategies capable of exploring meanings, negotiations, power relations, and adaptive responses that emerge among actors positioned within both regulatory and industrial spheres. In this regard, qualitative research enables engagement with lived experiences and institutional interpretations that shape regulatory enactment and technological adaptation (Samoilenko, Sharyi, and Zahrebelna 2024).

The digitalization of broadcasting constitutes a multidimensional phenomenon involving regulatory realignment, market restructuring, changing audience behaviors, and rapid advancements in media technologies. Quantitative indicators—for example, adoption rates or investment levels—while useful, cannot illuminate why regulatory lag occurs, how stakeholders negotiate institutional reforms, or what strategic considerations influence industry-level innovation. Therefore, qualitative research

supported an exploration of subjective understandings, institutional rationalities, and policy discourses that underpin transformation within the broadcasting landscape.

The study adopted a policy study design supported by in-depth interviews. Policy study, as a qualitative design, allows systematic review of formal regulatory frameworks, policymaking processes, and policy implications for industry stakeholders. The design was selected specifically due to the research objective of examining how Indonesian broadcasting policies respond to technological convergence and digitalization, and whether existing regulatory frameworks align with the evolution of industry practices. The design also provides opportunities to assess gaps between textual regulations and empirical experiences of actors positioned within the media ecosystem.

The policy study design was implemented by reviewing legal and policy instruments such as the Broadcasting Law, government regulations, ministerial decrees, and official strategic documents issued by regulatory authorities. The textual review served as the basis for mapping regulatory direction, identifying key policy changes, and analyzing potential discrepancies between regulatory intent and industry realities. To complement document analysis, in-depth interviews were used to explore how policies are interpreted and enacted in practice, and how industry actors strategize to respond to new technological demands.

The use of in-depth interviews strengthened interpretive analysis by enabling participants to articulate personal experiences and institutional conditions that shape their engagement with policy frameworks. These interviews facilitated the elicitation of nuanced insights on policy effectiveness, challenges in technological adaptation, and tensions arising from regulatory lag relative to industry innovation. Combined with policy analysis, interview data supported triangulated interpretations of how the broadcasting ecosystem evolves under conditions of digital transformation.

The empirical focus of the study was on the Indonesian broadcasting sector, with Jakarta designated as the primary research site. Jakarta was selected because it hosts key national institutions involved in policy formulation, regulatory enforcement, and strategic decision-making related to broadcasting. The city is home to the main offices of national broadcasting regulators, ministries responsible for communication and media policy, and headquarters of major broadcasting corporations. Concentration of regulatory and industry actors in Jakarta enhanced access to information on policy development and industry adaptation dynamics, thus strengthening the reliability of empirical insights.

In addition to Jakarta, interviews considered industry perspectives from Bandung and Surabaya, two metropolitan areas recognized for their emerging media production hubs and active development of digital content ecosystems. Including these locations broadened the perspective beyond Jakarta-centric policymaking and provided insight into how industry adaptation manifests across regional contexts. Selection of these supporting sites aimed to mitigate potential bias towards policy-level perspectives and to reflect the diversity of experiences in Indonesia's broadcasting transformation.

Participants consisted of four key informants selected using purposive sampling based on criteria of expertise, institutional role, and direct involvement in broadcasting policy or digital adaptation processes. Purposive sampling was considered appropriate because the research sought views from individuals with specialized knowledge relevant to the research objectives rather than a statistically representative population.

1. The informants included: a senior official representing the national broadcasting regulatory agency, pseudonymously labeled Informant A;
2. an executive responsible for digital strategy at a private national television station, labeled Informant B;
3. content manager from a digital media platform affiliated with broadcasting networks, labeled Informant C; and a representative of the national broadcasting industry association, labeled Informant D.

These informants were selected because each occupied strategic positions within policy or industry environments that directly intersect with digital broadcasting reforms. Collectively, their perspectives were expected to provide a holistic representation of policy development, institutional responses, technological adaptation strategies, and regulatory challenges associated with convergence.

Although four participants were initially targeted, participant recruitment followed the principle of data saturation. Interviews continued until thematic redundancy emerged and no new analytical insights were generated. This approach aligns with qualitative methodological expectations for establishing adequate sample size through analytical sufficiency rather than numerical quantity.

Informed consent procedures were applied to all participants, including explanations of research objectives, voluntary nature of participation, confidentiality protections, and the use of pseudonyms to ensure anonymity. Ethical procedures also required informants to confirm their willingness to be interviewed and to allow data to be used for academic purposes. Data collection employed two primary techniques: document analysis and semi-structured in-depth interviews.

Document analysis involved systematic review of policy instruments, regulatory guidelines, public statements issued by regulatory bodies, government reports on digital broadcasting, industry association publications, and relevant archival materials. Policy documents were analyzed to identify provisions related to digital migration, spectrum allocation, licensing frameworks, content regulations, and convergence policies. The review also sought to assess coherence of regulation with international standards and to identify policy revisions introduced to respond to technological developments.

Semi-structured interviews enabled participants to describe their experiences and institutional perspectives on broadcasting digitalization. Interview protocols included guiding questions related to regulatory challenges, institutional responses to technological shifts, strategies for digital platform integration, and perceptions of regulatory lag in relation to industry adaptation. However, interview structure remained flexible to allow emergent themes and to encourage participants to articulate their viewpoints in narrative detail. Interviews were conducted face-to-face in Jakarta or through secure online communication platforms, depending on informant availability and ethical considerations.

All interviews were audio-recorded with informant consent and subsequently transcribed verbatim. Field notes were compiled following each interview session to document contextual observations, emerging analytical insights, and reflections relevant for subsequent stages of analysis.

Data were analyzed using thematic analysis guided by qualitative coding techniques. Analysis proceeded through several iterative phases, including data reduction, organization, interpretation, and synthesis. During the initial reduction phase, interview transcripts and policy documents were carefully reviewed, and data segments relevant to research questions were identified and coded. Codes were generated inductively to capture emerging patterns, discursive framings, regulatory concerns, institutional strategies, and evidence of adaptation to new technologies.

Themes were constructed through grouping of related codes reflecting shared meanings or conceptual relationships. Themes were continuously refined to ensure analytical consistency and conceptual clarity. Key thematic categories included: regulatory challenges associated with digital convergence, institutional constraints faced by regulators, strategic responses by broadcasting corporations, collaborative initiatives between policy and industry actors, and innovation opportunities emerging from technological change.

Interpretative analysis involved examining relationships between themes and theoretical frameworks on digital governance, institutional adaptation, and media convergence. Interpretations were informed by comparing policy discourse with experiential accounts shared by industry actors and regulators. Attention was given to identifying tensions between formal policy provisions and practical implementation challenges that arise during technological transformation.

To enhance validity, the study implemented methodological and data source triangulation. Findings derived from document analysis were compared with interview accounts to corroborate interpretations and identify converging or contradicting narratives. The triangulation process enabled

the researcher to assess whether regulatory provisions reflected practical realities and to evaluate alignment between policy objectives and industry adaptation strategies.

Researcher reflexivity constituted an important mechanism to reduce interpretive bias. Reflexive memos documented the researcher's assumptions, positionality, and potential influence on data interpretation. Regular reflection facilitated critical awareness of subjective predispositions and strengthened analytical transparency.

Member checking was incorporated selectively when feasible. Informants were provided opportunities to clarify interpretations of their statements, especially when statements appeared ambiguous or when central to analytic claims. Confidentiality protections and voluntary participation remained primary ethical considerations throughout the research process.

Ethical approval for the study was secured prior to data collection. Participants were informed of the research objectives, confidentiality assurances, use of pseudonyms, and voluntary nature of participation. Consent was obtained verbally and in written form. Participants were allowed to withdraw at any stage without consequence. Sensitive institutional information disclosed during interviews was anonymized, and data storage followed secure archiving procedures.

The methodological approach adopted in this study combining policy review and in-depth interviews provided a robust foundation for examining tensions between regulatory developments and technological adaptation within Indonesia's broadcasting sector. Through engagement with policy documents and perspectives of strategically positioned informants across Jakarta, Bandung, and Surabaya, the study captured diverse institutional experiences shaping the digital transition. The approach enabled identification of regulatory lag relative to rapid industry innovation and facilitated an analysis of both constraints and opportunities emerging in Indonesia's shifting broadcasting ecosystem.

RESULTS AND DISCUSSION

Findings from this research reveal that Indonesia's broadcasting ecosystem is undergoing a transitional phase marked by structural tension between rapid technological shifts in the industry and comparatively slow regulatory adaptation. Interview and document analysis demonstrate that existing broadcasting regulations continue to reflect assumptions embedded in an analog and linear broadcasting paradigm. This is evident in regulatory classifications, licensing structures, and spectrum allocation principles that remain oriented toward traditional terrestrial broadcast systems. Meanwhile, industry actors particularly major private broadcasting corporations have progressively moved toward digital, networked, and multiplatform distribution models supported by data-driven audience engagement.

The discrepancy between regulatory frameworks and industry practice results in policy inertia that weakens regulatory effectiveness in managing the transformation of the media ecosystem. From a Media Ecology perspective, digitalization constitutes a significant transformation of the media environment requiring institutional recalibration. However, the findings indicate that the regulatory environment remains anchored in outdated assumptions regarding production, distribution, and audience relations. In terms of Media Convergence Theory, fragmented regulations create barriers to cross-platform integration, which has become standard in industry practice through hybrid broadcasting–digital content strategies. Insights from Political Economy of Media further highlight that delayed regulatory reform reflects unresolved negotiations among state regulators, domestic broadcasting corporations, and transnational digital platform providers.

This policy lag manifests not only administratively but also strategically. Informants from broadcasting institutions stated that regulatory uncertainty influences investment decisions concerning digital infrastructure, multiplatform production, and audience data technologies. Interview evidence suggests that despite regulatory inertia, industry actors continue pursuing digital adaptation autonomously to sustain competitiveness. The findings therefore suggest that broadcasting regulation in Indonesia functions reactively rather than proactively as an instrument of systemic transformation.

Regulators emphasized that caution in regulatory reform is necessary to maintain public interest obligations and avoid destabilizing the media system. Nonetheless, analytical triangulation reveals that prolonged misalignment between regulation and practice risks widening structural gaps that undermine

the sector's ability to respond collectively to digital convergence. As such, the findings underline a critical need for policy approaches that align more closely with the changing technological and industrial landscape.

The second cluster of findings concerns the widening gap between normative policy frameworks and actual industrial practices in digital transformation. Industry actors both legacy broadcasters and digital media platforms have adopted varied strategies to integrate digital distribution, expand online presence, and engage audiences through multiplatform content. Informants from broadcasting corporations described strategies such as digital simulcasts, social media content integration, monetization partnerships with over-the-top (OTT) platforms, and data-driven content development based on audience analytics. These innovations are driven by increasing competition from global streaming platforms and evolving audience consumption patterns that favor on-demand digital media over scheduled terrestrial broadcasting.

However, policy instruments analyzed through document review continue to maintain regulatory distinctions between broadcasting and digital media services. Interviews with regulators confirm that digital media remains largely outside the formal regulatory domain of broadcasting authorities, resulting in uneven regulatory obligations across actors competing in the same attention and advertising markets. Traditional broadcasters therefore continue to operate under licensing, compliance, and public service requirements not shared by digital competitors, creating unequal regulatory and cost burdens.

From a Media Ecology standpoint, the regulatory system appears misaligned with emerging patterns of media consumption, which are increasingly digital, personalized, and fragmented. Media Convergence Theory helps explain why industry practices have transcended sectoral boundaries historically embedded in broadcasting regulations. Meanwhile, the Political Economy of Media perspective points to structural risks created by these regulatory gaps, including increased concentration of ownership within digital markets and marginalization of local broadcasters lacking capital to compete with transnational digital platforms.

Interviews with industry representatives revealed concerns regarding sustainability under conditions of regulatory asymmetry. Local broadcasters expressed vulnerability to declining advertising revenues and shrinking audience share, problems exacerbated by outdated regulatory frameworks. Digital platforms, operating with fewer formal obligations, are able to capture expanding advertising markets and adopt flexible pricing and distribution models.

These findings confirm that regulatory gaps are not merely administrative discrepancies but constitute systemic pressures influencing industrial sustainability and market dynamics. The absence of integrated policy frameworks risks reinforcing inequalities within the sector as actors positioned to invest in digital transformation gain competitive advantage. This contributes to structural imbalances within Indonesia's broadcasting landscape, particularly between national and regional broadcasters.

The final set of findings identifies patterns in regulatory response and industry adaptation, highlighting implications for long-term sustainability of Indonesia's broadcasting ecosystem. Document review indicates that formal policy reform efforts have focused primarily on technical migration from analog to digital terrestrial broadcasting, spectrum reorganization, and the establishment of multiplexing systems. These reforms constitute incremental changes that do not fully address broader paradigm shifts associated with convergence, audience participation, and algorithmic distribution.

In contrast, industry actors interviewed consistently emphasized the need for agile regulatory frameworks capable of accommodating shifting content distribution ecosystems. Multiple informants described how innovation in business models and multiplatform strategies has been essential to sustaining audience attention in competitive digital environments. Examples include interactive content formats, audience data analytics, personalized content recommendations, and integration with social media ecosystems.

The findings suggest an asymmetric adaptation pattern. Regulators adopt incremental reform strategies grounded in precautionary principles, while industry actors pursue accelerated adaptation

efforts driven by commercial imperatives and technological opportunities. From a Media Convergence viewpoint, the industry’s rapid adaptation manifests the dissolution of traditional boundaries between broadcasting and digital media. Media Ecology highlights that industry adaptation represents an organic response to changing environmental conditions. The Political Economy of Media perspective illustrates that industry adaptation simultaneously serves as a competitive strategy to maintain leverage in an increasingly globalized digital marketplace.

The study also identifies systemic challenges emerging from this asymmetric adaptation: unclear regulatory boundaries between broadcasting and streaming services; insufficient regulatory support for local content innovation; and potential concentration of market power among dominant platforms. Yet, digitalization also presents substantial opportunities. Industry actors highlighted potential for localized content production empowered by data analytics, enhanced audience interactivity, and expanded distribution networks across platforms.

Interview responses indicate that collaborative governance involving regulators, broadcasters, and technology platforms will be vital to ensuring equitable access to innovation opportunities. Informants stressed the necessity of policy mechanisms that maintain fair competition, safeguard local media sustainability, and facilitate technological adaptation without imposing excessive regulatory burdens.

Collectively, the findings demonstrate that Indonesia’s broadcasting ecosystem stands at a critical juncture in digital transition. Incremental and sectoral policy approaches are insufficient to manage systemic transformation driven by convergence and technological innovation. The research contributes new empirical insights by examining the intersection of regulatory evolution and industry adaptation strategies, highlighting the need for comprehensive policy reform grounded in convergence principles and collaborative governance.

Table 1. Development of the Broadcasting Ecosystem and Implications for Digital Media Policy and Industry

Research Focus	Summary of Findings	Theoretical/Practical Implications
Misalignment between policy and digital transformation	Policy frameworks reflect analog logic while industry shifts toward multiplatform digital operations; regulatory lag undermines transformation management.	Reinforces Media Ecology, Media Convergence, and Political Economy interpretations; highlights need for proactive reform.
Regulatory gaps and industry adaptation strategies	Unequal regulatory obligations create structural market imbalances, disadvantaging traditional broadcasters.	Calls for integrated multisector regulation to minimize risks of marginalization and media concentration.
Policy responses, industry adaptation, and sustainability	Regulators adopt incremental reforms, while industry adaptation accelerates; sustainability depends on collaborative policy mechanisms.	Suggests shift toward convergence-based policy paradigms, regulatory flexibility, and support for local content ecosystems.

Source: Compiled by the author in the field, 2026

Table 1 presents a structured synthesis of key findings related to the development of Indonesia’s broadcasting ecosystem and its implications for digital media policy and industrial transformation. The first row highlights the persistent misalignment between established broadcasting regulations and ongoing digital transformation within the industry. Although broadcasters increasingly adopt multiplatform, convergent operations, policy frameworks remain embedded in analog logic. This regulatory lag weakens effective transformation management and corresponds with theoretical perspectives drawn from Media Ecology, Media Convergence, and the Political Economy of communication.

The second row underscores regulatory gaps that shape industry adaptation strategies. Unequal obligations across media platforms foster market asymmetries that disadvantage traditional broadcasters, creating risks of marginalization and encouraging media concentration. The findings stress the urgency of integrated multisector regulation to mitigate systemic imbalances.

The final row explains differing temporal responses between regulators and industry actors. Incremental governmental reforms contrast with rapid industry adaptation, implying that sustainability requires collaborative policy mechanisms, adaptive regulation, and structural support for local content ecosystems to strengthen long-term competitiveness within the digital broadcasting landscape.

The analysis of empirical evidence demonstrates that the Indonesian broadcasting industry has pursued diverse strategies to adapt to digital transformation, despite the absence of adequate regulatory support. Industry actors have developed multiplatform distribution channels, integrating linear broadcast operations with streaming platforms and social media networks. They have leveraged audience analytics to inform content design and invested in partnerships with global platforms to expand market reach. These strategies illustrate proactive adaptation driven by economic imperatives and evolving audience expectations, rather than regulatory encouragement.

Media Ecology Theory helps interpret these adaptive strategies as responses to changes in media environments. Digitalization disrupts traditional temporal and spatial constraints associated with linear broadcasting, enabling audiences to consume content asynchronously through various devices. Industry actors thus operate within a media environment characterized by fluid content circulation and personalized consumption habits. The regulatory framework, however, remains anchored to the concept of scheduled programming transmitted via terrestrial frequencies. Consequently, the industry navigates regulatory uncertainty to maintain competitiveness in the digital marketplace.

Media Convergence Theory highlights that industry adaptation reflects the erosion of boundaries among broadcasting, telecommunications, and digital content services. Industry actors adopt convergent infrastructures to integrate content workflows and distribution pipelines across platforms. Regulations, however, continue to reinforce sector-based distinctions between broadcasting and digital media, limiting the scope for cross-platform experimentation and business model innovation. The discussion identifies this regulatory gap as a structural barrier that constrains the industry's trajectory toward integrated content ecosystems, potentially undermining the competitiveness of domestic broadcasters relative to global platforms operating outside national regulatory constraints.

Political Economic Theory contributes further insight by examining how regulatory gaps influence market structure and distribution of economic resources. Inadequate regulation of cross-border digital platforms creates uneven market conditions, placing domestic broadcasters at a competitive disadvantage. Global platforms capitalize on regulatory voids to capture advertising revenue and audience attention without comparable obligations to domestic content quotas, licensing fees, or spectrum management. The regulatory absence shifts market power away from national broadcasters and jeopardizes the sustainability of local content production. The findings therefore reveal that the regulatory gap is not simply an administrative deficiency but an imbalance that shapes the structural evolution of Indonesia's media markets.

The discussion underscores that policy interventions have been fragmented and incremental, attempting to address digital transformation through technical adjustments rather than comprehensive regulatory redesign. These partial responses cannot adequately resolve the complex challenges arising from convergence. As the findings show, uncertainty in the regulatory environment encourages short-term strategic experimentation but undermines long-term investment planning, content diversity, and institutional accountability. Consequently, regulatory gaps weaken policy effectiveness and generate broader implications for industry sustainability and public interest protections.

The findings generate significant theoretical contributions by demonstrating the analytical utility of integrating Media Ecology Theory, Media Convergence Theory, and Political Economy of Media Theory to examine digital broadcasting transformation. Together, these perspectives provide a holistic framework to analyze technological, institutional, and market dimensions of digitalization. The

discussion argues that media transformation cannot be understood solely as a technological transition; rather, it involves institutional negotiation, market reconfiguration, and shifting audience agency. Theoretical integration thus strengthens scholarly explanations of how policy–industry dynamics unfold in developing digital ecosystems.

Practically, the discussion highlights the urgency of adaptive policy reform aligned with the realities of convergent media systems. Broadcasting policy should transition from medium-specific regulation toward a flexible, technology-neutral framework capable of governing cross-platform media services. Such reform requires integrating diverse regulatory domains telecommunications, internet governance, content regulation into a coordinated structure responsive to convergence trends. Strengthening collaborative policymaking mechanisms between industry actors and regulators is essential to enhance policy responsiveness and ensure mutual understanding of digital transformation challenges.

The findings also suggest that regulatory frameworks must prioritize protection of public interest objectives while accommodating innovation. Policy reforms should ensure sustainable conditions for local content industries by addressing regulatory inconsistencies that disadvantage domestic broadcasters vis-à-vis global platforms. Economic equity mechanisms, transparent licensing principles, and fair competition policy could contribute to more balanced market dynamics. The discussion also emphasizes the importance of regulatory clarity to reduce uncertainty, encourage long-term investment in digital infrastructures, and support innovation in content production across platforms.

From an academic standpoint, the study provides a contextualized understanding of digital transformation processes in emerging media environments. The integrated methodological approach combining policy analysis and empirical interviews offers valuable insight into the lived experiences of practitioners navigating regulatory constraints. The findings can inform future research on audience behavioral changes, digital platform governance, and content diversity in convergent environments. Comparative studies across developing countries could further illuminate broader trends in national adaptation to global digital transformations.

Overall, the discussion affirms that Indonesia’s broadcasting ecosystem is undergoing a transitional phase that requires comprehensive, forward-oriented regulatory reform. Addressing policy–industry misalignment, bridging regulatory gaps, and fostering sustainable media development demands a multidimensional approach integrating technological, economic, and social considerations. The study contributes to ongoing debates by emphasizing that digital broadcasting transformation must be conceptualized as an ecosystemic process involving interdependent stakeholders, regulatory structures, market forces, and public interest values.

CONCLUSION

This research concludes that Indonesia’s broadcasting ecosystem currently stands at a critical juncture shaped by accelerated digital transformation. Digitalization is altering not only the technical dimensions of content production and distribution, but also the institutional relationships between regulators, industry actors, and audiences. The empirical findings demonstrate that broadcasting governance remains anchored in regulatory paradigms associated with an analogue, medium-based system, while the industry has rapidly adopted convergent, multiplatform strategies. This discrepancy has produced a structural misalignment between policy and practice, resulting in regulatory uncertainty and uneven competitive conditions in the national media market.

The study confirms that national broadcasting policy exhibits an incremental and technical approach focused on migration administrations, licensing adjustments, and technical spectrum issues. Such efforts stop short of offering comprehensive regulatory reform capable of addressing convergence, cross-platform distribution, and the economic implications of digital competition. Broadcasting regulation continues to separate conventional and digital services, despite the industry’s complex integration of linear broadcasting, streaming platforms, and social media distribution. As a result, policy frameworks do not adequately reflect the realities of convergent media environments, limiting their governing effectiveness.

Simultaneously, the industry demonstrates relatively proactive adaptation to digital changes. Broadcasters deploy multiplatform dissemination, audience analytics, and interactive content strategies to maintain relevance in fragmented media markets. These adaptive responses reveal the strong influence of market pressure and shifting audience behaviors, illustrating how digital transformation drives structural reconfiguration within the broadcasting industry. However, the industry's ability to innovate is constrained by ambiguous regulatory spaces and a lack of consistent guidelines addressing convergent infrastructures. Consequently, policy responsiveness lags behind innovation in content creation and distribution technologies, creating a pattern of asymmetric adaptation between regulatory institutions and media organizations.

Theoretically, the study reinforces the analytical value of integrating Media Ecology Theory, Media Convergence Theory, and Political Economy of Media. Media Ecology provides a framework for explaining environmental changes shaping communication patterns and institutional responses. Media Convergence illuminates the dissolution of boundaries between media sectors and the institutional restructuring required to govern platform-based ecosystems. Political Economy of Media exposes the role of power relations and market competition shaping policy decisions and regulatory lag. Together, these frameworks facilitate a comprehensive reading of structural transformation processes in Indonesia's digital broadcasting sector.

In broader terms, the study concludes that Indonesia's transition toward digital broadcasting cannot be effectively governed through technical administrative adjustments alone. A paradigm shift is required one that moves beyond sector-specific regulations toward an ecosystem-based approach capable of integrating digital convergence, cross-platform content circulation, and shifting audience dynamics. This transition necessitates adaptive, collaborative, and future-oriented policy development to ensure regulatory coherence, maintain public interest protections, and sustain national media competitiveness in increasingly globalized digital markets.

The study's novelty lies in demonstrating empirically how industry adaptation strategies intersect with regulatory gaps, revealing systemic misalignments between policy frameworks and technological realities. By linking regulatory evolution, institutional power relations, and industry innovation, the research contributes foundational insights for rethinking broadcasting governance under digital convergence. The findings underscore the urgency of developing responsive broadcasting policies that accommodate innovation while safeguarding diverse media ownership, local content sustainability, and democratic communication values.

Ultimately, the research asserts that Indonesia's broadcasting transformation must be conceptualized as a complex ecosystemic process involving technology, policy frameworks, market dynamics, institutional interests, and audience agency. Without comprehensive policy modernization, the regulatory system risks becoming obsolete within a rapidly evolving media environment, potentially undermining media diversity, industry sustainability, and equitable access to information in the digital era.

Recommendations are proposed to address regulatory-industry misalignment and foster sustainable development of the digital broadcasting ecosystem in Indonesia. These recommendations aim to support policy responsiveness, enhance industry competitiveness, and protect public interest values within convergent media environments.

First, regulatory reform must shift from medium-specific frameworks toward flexible, technology-neutral policies aligned with convergent media realities. Policymaking should integrate broadcasting, telecommunications, and digital platform governance into a unified regulatory architecture capable of accommodating cross-platform media flows. A comprehensive redefinition of "broadcasting services" is necessary to acknowledge digital platforms and streaming services within the regulatory domain. Without such reform, policy fragmentation will continue to produce regulatory ambiguities, asymmetrical competition, and structural disadvantages for domestic broadcasters.

Second, the regulatory process should institutionalize participatory mechanisms enabling structured dialogue between regulators, broadcasters, digital platform representatives, and civil society stakeholders. Empirical evidence suggests that policy lag is partly attributable to divergent

understandings of digital transformation among stakeholders. Inclusive policymaking forums supported by regular consultations, public hearings, and policy co-design can foster shared understanding and improve policy responsiveness. Such mechanisms can also prevent adversarial policymaking, rebuild trust, and bridge adaptation asymmetries between industry and state institutions.

Third, policy interventions should incorporate strategic measures to ensure sustainability of local media and encourage innovation in local content production. Regulatory incentives could include tax relief for digital investment, content development funds, obligations for platform contributions to local content ecosystems, and transparent competition enforcement regarding advertising revenue distribution. These interventions would help mitigate market disparities between global platforms and national broadcasters while promoting cultural diversity and public interest objectives.

Fourth, policymakers must prioritize regulatory clarity and long-term governance frameworks to encourage industry investment in digital infrastructures, human resource development, and innovative content pipelines. Clear rules regarding content classification, licensing for digital services, data governance, and spectrum management are essential to reduce uncertainty and enable industry actors to strategize beyond short-term adaptation. Policy certainty also strengthens investor confidence and fosters sustainable digital broadcasting investments.

Fifth, industry actors are encouraged to institutionalize digital adaptation beyond technological upgrades by developing organizational capabilities, restructuring workflows for multiplatform content, and investing in digital skills development for media professionals. Industry–academia collaboration can support capacity building and accelerate digital literacy among practitioners, enabling creative and managerial innovation in convergent media environments.

Sixth, the academic community should expand future research by incorporating quantitative analysis, digital platform governance perspectives, and empirical examinations of audience behavior. Comparative and longitudinal studies are necessary to analyze long-term regulatory effects, market restructuring, and content diversity outcomes under digital convergence. Such research can enrich theoretical understanding of media transformation processes and inform policymaking grounded in empirical realities.

Collectively, these recommendations emphasize the need for systemic reform grounded in cross-sector collaboration and grounded evidence. Sustainable digital broadcasting governance requires synergy among regulators, industry actors, scholars, and the public to ensure that technological innovation aligns with democratic communication values, market fairness, and cultural sustainability.

In conclusion, advancing Indonesia’s digital broadcasting ecosystem demands adaptive, ecosystem-based regulation, collaborative policymaking, and strategic support for industry innovation. Without such integrative approaches, the sector risks exacerbating regulatory gaps, market inequalities, and institutional fragmentation in an increasingly competitive global media landscape. The proposed recommendations therefore serve as a roadmap for future-oriented policy transformation capable of balancing innovation, competition, and public interest protections in the era of convergent digital media.

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