

SUMMARY

The Mapping of Indonesia Music Sector Ecology



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Researcher
Idhar Resmadi (Ketua Peneliti)
Rendy Pandita Bastari (Anggota Peneliti)

Design
Sutri Agus

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The Fish Police at UK/ID Festival 2018. © British Council Indonesia

FOREWORD

Music is a vital part of our cultural life, a powerful force for enriching our lives, forging strong and lasting connections between people, and shaping our sense of identity and place. The contemporary artistic and cultural life of Indonesia is incredibly diverse, given it is a country that spans a huge geographical area of East Asia with over 17,000 islands - and is the world's 4th most populous country. Indonesia has a rapidly developing music landscape. A thriving music sector is increasingly recognised across the world as valuable to economic growth; supporting creative and skilled jobs, tourism, and a thriving night-time economy – in itself, an engine to the wider cultural dynamism of cities.

The British Council music programme connects artists, producers, organisations, institutions and audiences internationally. We work closely with colleagues internationally to devise projects and programmes, responding to the local context and areas of need in specific countries as well as forging connections with the music sector in the UK.

In 2016, during a research visit to Jakarta and Bandung, I took part in hosting a roundtable session with a variety of inspiring actors from across the music sector. Immediately apparent was the great affinity and admiration many Indonesian artists and producers had for the UK music scene, including knowledge of an array of UK artists and music genres I hadn't expected. The other important and striking takeaway was that the Indonesian music scene thrives on an independent and self-determining ethos. Since that time British Council supported UK/Indonesia 2016-18 (UK/ID) - a three-year campaign helping artists and creative communities to connect, spend time together, collaborate, and share the outcomes with the public in both countries. An active programme of music projects has been an integral part of this - making connections between many artists, producers, music practitioners, as well as supporting some exciting exchanges between festivals, organisations, and policy makers. Intrinsic to this is developing professional capacity within and for the sector, supporting professional skills and knowledge exchange, alongside some quality artistic collaboration.

In 2019, British Council Indonesia commissioned research to map the distinctive and rapidly evolving landscape of the music industry in Indonesia: the operational framework and business models shaping the context that music practitioners are working in, including funding, sponsorship and financing, the regulatory and licensing context. Key

to the understanding where British Council can focus support is an understanding of the overall music eco-system, and this survey indicates some of the ongoing challenges and opportunities. Researchers took three comparative case studies from three of the cities that are influencing and representative of the growing music sector: Bandung, Bali, and Jakarta. This report helps to identify music sector development needs for each place and measures which will enhance an inclusive approach to growth in the sector.

There is no shortage of talent in Indonesia, which a recent flourish of record labels, festivals and live concerts is testament to. If seemingly driven by a DIY ethos, there is an increasing appetite to formalise the professional frameworks and infrastructure – to be one that can support the growth of the music sector and stabilise income streams for those working within it.

This piece of music research reveals some of the specific challenges of the Indonesian music sector. It is by no means intended as comprehensive mapping, and neither is it offered as a step by step fix all. However, we do hope it will offer valuable insights into the inner workings of the current sector as well as signposts towards new directions for support and inspiration for collective ambition.

Joel Mills

Senior Music Programme Manager,
British Council

SUMMARY OF RESEARCH

Indonesia has experienced an exponential development in its music industry within the past few years, with the arrival of new, hot-shot bands, emerging spaces where music-based communities gather, and a host of highly conceptual music festivals. The breadth of potential demonstrated by the Indonesian music industry is further boosted by the sheer enthusiasm of its youth, easily the country's biggest demographic. Among the most thriving music ecosystems in Indonesia is, without a doubt, its independent scene.

This research will touch upon the independent music ecosystem in Indonesia. More specifically, the case study expounded in this research will focus on three cities: Bandung, Jakarta, and Bali, considering these are the Indonesian cities that incontestably represent the current independent music phenomenon. Each city, with its own set of phenomenon, will be discussed, particularly tackling the aspect of practitioners (communities, industry, the government), as each plays an integral role in the makings of their respective ecosystem; in addition to the condition of their music venues and their existing infrastructure, which is the most important factor in a music ecosystem. Furthermore, there will also be discussions on policies relating to music, artistic and cultural values, supporting network in the industry and funding, and the role of music venues and infrastructure. This research will also bring forth another case study with the British music ecosystem as a comparison. This point of comparison is expected to serve as a model for the development of the music ecosystem.

The research will result in several recommendations and actions, which are expected to be the solution in developing the Indonesian independent music ecosystem as it progresses into the future. More specifically, this research is also expected to develop a more intensive cultural cooperation between music communities in Indonesia and the UK, to result in a more solid connection and eventually further benefit the future of Indonesia's independent music ecosystem.

A. Music Policies in Indonesia

After the downfall of the Music Draft Bill, no specific policy has been enacted to regulate the Indonesian music industry. At present, statutory regulations with any relation to the music industry are Law No. 28/2014 on Copyright, Law No. 5/2017 on Culture Advancement, Law No. 13/2018 on the Handover of Print Works and Recorded Works, and Law No. 24/2019 on Creative Economy. All of these regulations are related to the context of developing the music industry, especially in terms of copyright, data collection and data archiving, music infrastructure, and creative economy development.

Table: Analysis from various regulations/policies/recommendations related to the music industry and the impact of their development

Policy/Regulation/Recommendation	Impact of Development
2015-2019 Development Plan for the National Music Industry	Formulating a blueprint to develop the management and ecosystem of the music industry and urging government institutions such as Bekraf (now Kemenparekraf/Baparekraf or Ministry of Tourism and Creative Industry/Tourism and Creative Industry Agency) to implement its programmes per the 2015-2019 Development Plan for National Music Industry.
Law No. 28/2014 on Copyright	The mechanism on royalty collection remains weak due to the lack of an integrated data collection system on the recorded works produced by Indonesian musicians. Thus, to formulate a royalty system that is definite, transparent, and in line with the current technology development, the government is establishing a big data platform named Portamento. Moreover, the government is to develop a new model on copyright law, a more modern fare that coheres with technology development.
Law No. 5/2017 on Culture Advancement	Law No. 5/2017 on Culture Advancement serves as a significant legitimisation on having culture as a pillar of development for Indonesia's future. This law may urge the government to realise a series of policies, rules, regulations, and programmes at a local scale to boost cultural activities, including music, especially in the aspect of protecting, developing, utilising, and managing the industry.
Law No. 13/2018 on the Handover of Print Works and Recorded Works	The state must carry out data collection and data archiving of music practitioners. Thus far, these activities are carried out by private institutions such as Irama Nusantara or music collectors; even though data collection and data archiving are highly essential as per the recommendations made by musicians at the 2019 Indonesian Music Conference (KAMI) as well as Law No. 24/2019 on Creative Economy.
Recommendations in 12 Action Plans from the 2018 Indonesian Music Conference (KAMI)	The three-day conference gave birth to a host of recommendations on music management and ecosystem, to be delivered to President Joko Widodo (Jokowi). These recommendations focus on three points: an integrated data collection system, music infrastructure, and music education.
Law No. 24/2019 on Creative Economy	This law may serve as a legal umbrella for creatives, including musicians, to advise the government to provide a host of means, including for music research, music infrastructure, and music education.

Source: Compiled by authors

As per our observations from the 2018 and 2019 instalments of the Indonesian Music Conference (KAMI), the Indonesian government is in the midst of developing the Portamento Project. At present, the government is formulating a roadmap on music management based on big data, with the establishment of the Portamento Project, an integrated management and information system for song copyrights to accommodate all music practitioners in Indonesia. This platform is expected to respond to the challenges faced by the music industry in the digital era, especially regarding copyright and royalty. This system is currently being assessed. During its development, the system will connect all practitioners in the music ecosystem, ranging from investors to state institutions such as the Directorate General of Taxes. The system will replace the regulations on copyright and royalty currently carried out by the National Collective Management Agency (LKMN). Via the Portamento Project, it is expected that all managerial matters related to royalty and digital technology development will be properly handled. The formulation of Portamento may be deemed an ambitious undertaking since it will become the first-ever big data management system in the world. To that end, at the 2019 KAMI, supervision by music practitioners and communities was called for to ensure a bright future for the project.



Based on our observations from the Indonesian Music Conference (KAMI) in 2018 and 2019, the following **12 recommendations** were made concerning the development of the music ecosystem:

<p>Immediately realise an integrated data collection system of Indonesian music that involves a cross-institutional data network between agencies, ministries, and public data centres with a mechanism that ensures access for all stakeholders of the Indonesian music industry.</p> <p>1</p>	<p>Mainstream music in the national education and cultural diplomacy to enrich the means of utilising music as a cultural expression, economic asset, and developer of national character.</p> <p>2</p>	<p>Improve music appreciation and literacy by strengthening and standardising the curriculum of music education at primary and secondary education levels as well as improving the competence of music educators at school.</p> <p>3</p>
<p>Establish music education in Indonesia that is relevant to the local context in every Indonesian region to produce music makers, workers, and academicians.</p> <p>4</p>	<p>Recommend the realisation of gender equality in the Indonesian music industry via the implementation of clauses that are gender-responsive in work contracts among musicians as stated in the employment regulation and implement regulations that prohibit sexual violence and harassment in music spaces.</p> <p>5</p>	<p>Realise a system and a mechanism for digital distribution to ensure transparent, real-time, and reliable access, one that is also protective of works by Indonesian musicians.</p> <p>6</p>
<p>Realise an infrastructure that ensures that music events, education, and production meet eligibility standards, are relevant to the local culture, and ascertain widespread, equal, and fair access.</p> <p>7</p>	<p>Recommend the protection and development of the ethnic music ecosystem by exchanging musicians between regions, assuring environmental sustainability and natural resources, and implementing proper benefit exchange as a mechanism for all uses of ethnic music.</p> <p>8</p>	<p>Improve the welfare of Indonesian musicians by establishing a national royalty tariff, a mechanism for fair royalty pay, a monitoring system, a mechanism for law enforcement for every violation of a musician's intellectual property rights, and a minimum wage standard for musicians.</p> <p>9</p>
<p>Improve public knowledge and love for Indonesian music by disseminating knowledge on the history of Indonesian music and critics of Indonesian music, spearheaded by professional music journalists.</p> <p>10</p>	<p>Improve assurance and professionalism among stakeholders of the music industry and music education by improving the number of music institutions and management agencies as well as synchronise competence-based and profession-based certification agencies to align with the specificities of the Indonesian music industry.</p> <p>11</p>	<p>Realise a management system for the Indonesian music industry with improved managerial professionalism for musicians, labels, and music publishers via a clear distribution of roles to boost creativity and productivity among musicians.</p> <p>12</p>

3 points

These twelve points are then whittled down to three main points: integrated data collection and data archiving system, music infrastructure, and music education.

The prominent discourse at KAMI 2019 appears to revolve around the establishment of a trade union for musicians, digital music management, and a music city. Based on the three expositions at the 2019 KAMI plenary meeting, a trade union is necessary to serve as a mediator as a means to protect musicians from imbalanced power relations, considering it has been a long tradition for music-related policies not to involve actual musicians in their formulation. Meanwhile, the government must partner up with musicians to realise inclusive policies for music practitioners from various backgrounds.

During our observational research, there was no regulation or policy found regarding the development of the music ecosystem in Bandung, Jakarta, and Bali. Each of these cities would take part in a short-term programme, such as in a permit procurement for an annual music event or festival. When it comes to stakeholders, it can also be said that music communities barely depend on the government and may instead join forces with private parties, such as cigarette companies or local clothing brands. Music communities rarely take part in the establishment of any government-made programme or policy, especially concerning music.

Supervision is also necessary to propose the implementation of government-made policies, to hit the right target among music practitioners. At present, the development of the music ecosystem is protected under the

law via Law No. 5/2017 on Culture Advancement and Law No. 24/2019 on Creative Economy. To that end, all parties need to cooperate to have these policies implemented according to the requirements of each region.

In the realm of policy, music think-tanks are therefore required to act as a middle man or a mediator between music stakeholders (communities, industry, academicians, and the government) as well as to recommend and realise a host of policies and recommendations based on the issues found in the field. The role of a music think-tank is to carry out activities, ranging from research, lobbying, campaigning, partnership, and education to ensure the development of the music ecosystem. A music think-tank will play a highly crucial role if established in every city/region. The establishment of a think-tank may lead to the formulation of policies whether nationally or regionally and facilitate the delivery of recommendations to the government to develop the music ecosystem, particularly concerning issues such as venue and infrastructure, permits, management, music business, and so forth. Based on our observations, no less important in the development of the Indonesian music ecosystem is policy or advocacy, as a lot of music activities and programmes do not involve any actual music practitioners. Thus, it can be concluded that the role of music advocacy is practically non-existent in the current music ecosystem in Indonesia. This is where music think-tanks will come in handy.



Kunokini at the opening of UK/ID Festival 2018, Archipelago Festival. © British Council Indonesia

Among the roles of a music think-tank that may be used as a case study is UK Music¹. UK Music is a music think-tank funded by the music industry and practitioners in the UK established in 2008. Its role is to represent the issues faced by the country's music ecosystem, meaning all music stakeholders in the UK: record labels, music publishers (major and independent), songwriters, composers, lyricists, musicians, managers, producers, promoters, venues, and collectives/communities. UK Music is responsible for lobbying, campaigning, making recommendations, creating policies, promoting, researching, managing copyrights, educating, and encouraging the emergence of new talents in the UK music scene, in addition to promoting advocacy to the government. With UK Music, it is expected that all issues faced by the music ecosystem will be heard by the government before coming up with regulations, recommendations, and policies related to the music ecosystem that respond to the issues dealt with at a grassroots level. In addition, the think-tank collaborates with academicians/universities to carry out research on the economic value of music via Music by Numbers, Measuring Music, and Wish You Were Here.

¹ For more information on UK Music, go to www.ukmusic.org (accessed on 3 February 2020)

B. The Independent Music Ecosystem in Indonesia: Case Study in Bandung, Jakarta, and Bali

1. Music Ecosystem in Bandung



a. The Role of Cigarette Companies, Local Clothing Brands, and the Local Government in Bandung's Independent Music Ecosystem

Cigarette companies dominate nearly the entire independent music scene in Bandung. All cigarette companies are investing in nearly all sectors of the ecosystem, from gigs or showcase, music media, tours, festivals, and venues/hangout places. As a result, the music ecosystem in Bandung is reliant on cigarette companies. Music events that take place are seemingly a mere extension of the cigarette industry.

These cigarette companies play a vital role. Among the most dominant representatives of cigarette companies in Bandung are DCDC by Djarum Coklat, Kolektif Ngawur and Siasat Partikelir by Sampoerna, and Super Music and Super Generation by Djarum Super. Cigarette companies can disburse large sums of money for music events with superior production value, which stands in stark comparison to DIY events created by music collectives. However, cigarette company-sponsored events are also encumbered by their Key Performance Indicator, which targets to bring in the biggest crowd possible. These companies emphasise on promoting and marketing their brands via music activation, resulting in free events that rely on universally known bands. Inevitably, this results in stunted regeneration of bands and limited appreciation for lesser-known bands, at the expense of exposing the public to new bands. Or, the new bands end up competing with more popular bands to appeal to the cigarette companies. Meanwhile, the Indonesian government is imposing increasingly stricter regulations on cigarettes, which will undoubtedly affect the music ecosystem in the long run.

Local clothing brands are also equally supportive of the music ecosystem. However, their support is largely perfunctory, limited to the promotion and marketing of their products. Normally, these brands offer free products for the bands to wear or funds to organise a music event. Very few local clothing brands branch out to the business side of things, such as establishing a record label, an event organiser, a music media, a publishing company, a music festival, or a band promoter. Since their support is nothing more than providing products to be promoted by music communities, local clothing brands indeed do not offer long-term support for the music ecosystem.

With cigarette companies and local clothing brands being the dominant actors in the music ecosystem, this results in the lack of initiation and knowledge of the music business among them that is relevant to the current necessities of the music industry; whereas a good music ecosystem will only thrive when there are practitioners from relevant sectors. Therefore, some

sort of diffusion of innovation would be necessary to provide new knowledge and in turn incite the growth in sectors relevant to the music industry, such as music promoter, event organiser, record label, artist management, and music media.

The Bandung City Government has begun to support the music ecosystem via Festival Musiconic. However, the government has yet to embrace the aspirations of other independent music communities; as such, its support remains partial and its impact lacking in the grand scheme of things. Festival Musiconic itself has yet to provide an ample room for the independent music communities at large, making its impact less felt by the music ecosystem and coming across as short-term. Meanwhile, what the music communities need is a long-term commitment for the infrastructure, such as venues, the facilitation and standardisation of permits to prevent exorbitant prices and extortion, music education, and financial assistance for international tours to further promote Indonesia at an international scale. This means that the government will need to focus on policy and familiarisation, such as by issuing a Mayoral Regulation on the standardisation of procuring permits for music events

Independent music communities in Bandung do not have strong political standing due to a lack of mediation between the communities and the government, a dialogue about the communities' needs and aspirations. The policies and programmes initiated by the government have yet to fully integrate music practitioners in their formulation. Hence, the apt middle man or mediator is necessary to accommodate the needs of music stakeholders in Bandung. A mediator will bridge the music communities and their needs with the local government to eventually propose public policies and programmes that are inclusive and responsive to these needs, aside from having a social, cultural, and economic impact. To achieve this, the government must listen to the needs and aspirations of the music communities to further understand the music market and the dynamics of the music industry.

There is also a conflict in the Bandung music ecosystem, as evident in the lack of synergy between music communities, local clothing brands, cigarette companies, and the local government, as everyone seems to be playing their own role, doing things their own way, according to their own agenda, as cigarette companies and local clothing brands continue to be the dominant forces.

Meanwhile, cigarette companies are hindered by various regulations that may prevent them from going all out in organising music events as there are marketing targets to meet. Cigarette companies that support the music ecosystem are merely part of their promotional machine, while the government continues to impose limiting regulations on the cigarette industry. In the end, the role of cigarette companies merely revolves around promoting and marketing their products, limited by their segmentation and positioning.

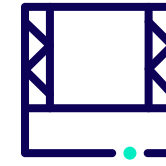
Music events organised by local clothing brands and DIY collectives are also in low numbers. This is because the support by local clothing brands only goes as far as having their products promoted and marketed by disbursing said products and a limited amount of funds. Very few local clothing brands are fully and professionally investing in the music sector by establishing a record label, a publisher, an event organiser, or a music media. The lack of funding leads them to focus more on organising music events at alternative venues such as coffeehouses, cafés, secondhand houses, or used markets, resulting in less than satisfactory and professional production quality. Often, the bands are selected for these events due to friendship-based interest or subjective taste. Despite this, music events by local clothing brands and DIY collectives are certainly on the rise and serve as a viable alternative from events organised by cigarette companies.

When observing the music ecosystem in Bandung and the role of its practitioners, it is evident that very few actual music professionals are involved, considering Bandung is mostly known for being dominated by university students. On one hand, the booming population of university students means that the youth have a strong grasp of the market. On the other hand, there might be a lack of initiatives since university students have limited time and financial resources to organise events. As a result, these students mainly gather their supporters via arguably militant music collectives.

From the above explanations, it can be concluded that music activities are mainly carried out by cigarette companies, local clothing brands, and DIY collectives. Very few dabble professionally in becoming booking agents, band promoters, event organisers, social media marketing officers, publishers, music directors, music producers, business managers, and music journalists. This indicates that not many invest in the music industry or become music entrepreneurs, with the main reason being a large amount of investment required to establish a business in the music industry. For instance, to establish an event organiser, there is a large sum of production cost, venue leasing cost, and exorbitant permit cost involved, not to mention the excessive financial support by other businesses for the music sector. This typically results in event organisers choosing to play it safe by joining forces with cigarette companies and organising corporate events instead of coming up with their own programmes and festivals. As a result, there is a lack of variety in the existing music events; this is proven by the fact that there has not been any music festival in Bandung within the past few years that is not conceptualised and sponsored by a cigarette company.

Viewed from the social lens, the music ecosystem in Bandung requires a more inclusive social and creative hub to propose collaborations among stakeholders. On one hand, there's a great competition in Bandung among communities, cigarette companies, local clothing brands, and the government that makes it seem as if each stakeholder has a go at things as per their objectives and interests. However, efforts to produce music entrepreneurs or to empower music communities with ample bargaining power must be in place to ensure more opportunities within the music industry. More diffusion of innovation must also be in place to create more music events that promote innovation instead of merely promote cigarettes or local clothing brands as well as events with a strong social message backed by the industry itself. Furthermore, when it comes to gender equality, the music ecosystem in Bandung is heavily dominated by men.

Furthermore, when it comes to gender equality, the music ecosystem in Bandung is heavily dominated by men. **Therefore, inclusive education and campaign must also be in place to inform the masses that everyone is welcome in the music industry.** Within the past few years, the Hijrah (Islamic hyperreligiosity) trend is also on the rise among music communities, further confirming the power of music to come up with changes in socio-cultural values, incite creativity, economic opportunities, environmental awareness, and convenience for its movers and shakers.



b. Conditions of Music Venues and Music Infrastructure

There is no ideal music venue in Bandung, not even any creative hub to carry out activities for music communities. After the dissolution of Spasial in mid-2019, there is seemingly no more creative hub in existence to build connection among music communities.

Thus far, music events in Bandung are often organised in commercial spaces such as cafés or coffeehouses, which are indeed less than ideal and representative for these type of events. Furthermore, cafés and coffeehouses are often used by cigarette companies for their events. Generally, cigarette companies place more investment in their creative hubs disguised as hangout places, such as 107 Garage Room by Sampoerna and Kantinasian The Panasdalam by Djarum Coklat, which often organise music-related events, such as workshops, chat shows, and small gigs.

Meanwhile, music communities tend to be reluctant to utilise government assets since this move is considered too bureaucratic and government officials are often difficult to communicate with when it comes to funding. Furthermore, the lack of standardisation for music events in Bandung results in exorbitant venue leasing cost and permit cost. In turn, this snowballs into a maze of issues that involve various parties, including security forces. As rooms for expression become more limited, it becomes increasingly difficult to invest in music events; no independent festival takes place in Bandung at the moment, aside from those created and sponsored by cigarette companies.

In general, there are two main issues related to music venues in Bandung: first, the economic issue. As yet, there is no ideal business model for the management of a music venue. In general, the business model employed for music venues is simply leasing cost or profit-sharing. Music venues that do exist are owned by and used as promotional tools for cigarette companies, such as Garage Room dan Kantinnasion The Panasdalam. Leasing cost has traditionally been the main issue for music venues; it is a reoccurring happenstance that a music venue shuts down due to rising leasing cost.

Second, the social issue. Some music venues have been forced to shut down due to conflicts with locals in their surroundings. As social values remain conservative, conflicts have arisen due to the loud nature of music events, with brawls, riots, and liquor bottles being strewn over the area as a result of the music events leading to the shutdown of music venues.

Very few music venues in Bandung have stood the test of time due to the lack of a proper business model, facility damage inflicted by audience members, as well as conflicts with locals. A lot of these venues were established in residential areas, making them prone to causing unrest for locals in their surroundings. Some of the issues frequently faced by creative hubs are economic issues (establishing programmes, market, and business model) and social issues (protests by locals, facility damage, and social clashes)

Table: Topology of the Bandung Music Ecosystem

Topology of Ecosystem	Description	Positive Aspects	Negative Aspects
Cigarette companies	Cigarette companies possess assets and enormous amounts of funding. These companies dominate nearly all music events, from gigs, solo concerts, international concert tours, music media, big festivals, and community spots/hangout places	Massive production and promotional funds, ample support in all scales of necessities	Hit by regulations, prone to co-optation, too focused on target and segmentation, less focused on long-term ecosystem
DIY/local clothing brands	Local clothing brands often support music communities by providing funds and products, organising gigs, funding albums and tours	Providing a space for new bands, serving as an alternative to cigarette companies, focused on community empowerment	Limited production and promotional funds, reliant on personal taste and friendship, prone to unsustainability
DIY/Collective/Community	Communities or collectives often organise music events independently, usually at music communities	Providing a space for new bands, serving as an alternative to cigarette companies, focused on community empowerment	Limited production and promotional funds, reliant on personal taste and friendship, prone to being unsustainable
Art showcase at high school and university	High schools and universities often organise annual music events, usually inviting renowned musicians to draw in large crowds	Massive promotion, focused on the exciting youth market, providing a space for independent bands	Lack of space for newer bands, segmentation limited to adolescent taste
Government-sponsored festivals	The Bandung City Government runs a programme to support the music ecosystem via the Musiconic festival, supported by a compilation album.	Only focused on pop, alternative, or coffeehouse music	Lack of space for independent communities or genres, out of the touch with current trends in the market, lack of social and cultural impact

Source: Compiled by authors

c. Conclusions and Recommendations



Based on the above discussion, the following are our recommendations for Bandung music ecosystem:

1. The necessity of programmes and training sessions to boost the emergence of innovators in music entrepreneurship with improved professionalism.
2. The necessity of a mediating role to bridge the needs of music practitioners with the various policies and programmes run by the regional government.
3. The necessity of regulations to standardise permit and venue leasing costs and make them more affordable, especially for small- and medium-scale event organisers.
4. The necessity of programmes and campaigns to promote the emergence of female musicians.
5. The necessity of a music infrastructure in the form of performance halls and creative hubs that are more inclusive to all music practitioners. A more ideal business model on managing community hubs or music venues must also be in place.
6. The necessity of programmes and social campaigns to maintain music communities and venues to increase the awareness of the importance of having inclusive spaces to ensure improved regeneration.

2. Music Ecosystem in Jakarta



a. The Role of Music Entrepreneurs

The last few years have seen the rise of initiators/innovators in the Jakarta music ecosystem. These are the active players in the Jakarta music ecosystem, the music entrepreneurs that give birth to a slew of music business innovations, ranging from record labels, artist managements, promoters, event organisers, media, and cafés/community hubs. These entrepreneurs have also come up with regular gigs, music festivals, and even new music venues in the Jakarta music scene, with the awareness of establishing a business model in the music industry. This should explain why the Jakarta music ecosystem is currently thriving, as these entrepreneurs are on the rise and initiating things left and right, boosted by diverse supporting industries and the rising middle-class population.

Regular gigs, music festivals, and music venues are among the most prominent initiatives by these rising music entrepreneurs, who have played a massive and significant role in the Jakarta music scene within the past few years with the establishment of Demajors (record label), M-Bloc Space (music venue), Kios Ojo Keos (music venue), Studiorama (collective/music promoter), Noisewhere (music collective/promoter), Ismaya Live (music promoter/event organiser), Sun Eater Records (artist management/record label), Berita Angkasa (artist management/record label), Juni Records (artist management/record label), 630 Recordings (artist management/record label), Organic Records (artist management/record label), Sounds from the Corner (music media), Kolibri Records (record label), Satria Ramadhan Manajemen/SRM (artist management), Frekuensi Antara (collective/music media), Siasat Partikelir (collective/music media), and many others. These music entrepreneurs are turning independent music into a significant business opportunity by not only actively investing in music but also initiating events, whether for entertainment or promotional purposes, making them the current driving force behind the development of the Jakarta music ecosystem.

Table: Key organizations that have important roles in the independent music ecosystem in Jakarta

Name	Category	Description	Contact
Demajors	Record label	Demajors is a record label that has been established since 2001. Demajors initiated one of the most prestigious music festivals in Indonesia, the Synchronize Festival.	@demajorsrecs
M-Bloc Space	Creative hub	M Bloc Space is a creative space established in 2019 that organizes various creative activities including music shows.	@mblocspace
Kios Ojo Keos	Creative hub	Kios Ojo Keos was established in 2018. A creative space in the form of a bookstore, coffee shop, and small-scale music venue.	@kiosojokeos
Studiorama	Music collective / music promoter	Studiorama is a music collective, which also acts as a curator for multiformat music shows of various genre, combining music with video / experimental art	@studioramajkt
Noisewhere	Music collective / music promoter	Noisewhere is music collective that also hosts music shows and invite international bands.	@noisewhere
Ismaya Live	Music promoter / music festival organizer	Ismaya Live is one of the biggest music promoters in Indonesia. They initiated various prestigious international festivals such as We The Fest (WTF) and Djakarta Warehouse Project (DWP).	@ismayalive
Double Deer	Music collective / record label	Double Deer Music is a music collective / record label that focuses on developing the electronic music scene. They also provide courses in electronic music.	@doubledeermusic
Sun Eater Records	Artist management / record label	Sun Eater Records is an artist management, record label, and content creator. Through their contents, they are very adaptive to social media developments	@suneatercover

Name	Category	Description	Contact
Berita Angkasa	Artist management / record label	Berita Angkasa is an artist management and record label that houses independent bands such as Kelompok Penerbang Roket, Jangar, Kurosuke, Sapphira Singgih, and Raffi Muhammad.	@beritaangkasa
Juni Records	Artist management / record label	Juni Records is a holistic record label that houses Raisa, Kunto Aji, Dipha Barus, Ramengvrl, Gbrand, Josh Kunze, Monica Karina, and Tashoora.	@juni_records
Organic Records	Record label / media	Organic Records is a record label owned by the band Maliq & D'Essentials management which oversees Maliq & D'Essentials, Sir Dandy, and Calliope. They initiated a music media called Pop Hari Ini.	@organicrecords
Satria Ramadhan Management (SRM)	Artist management	SRM is an artist management that has been established since 2008. Some of their artists/bands include Sore, Trees and the Wild, Bangkutaman, Ballads of the Cliché, L'alphalpha, Rumah Sakit, Barefood, Sajama Cut, and many more. They are also active in holding music shows.	@srmbands
630 Recordings	Artist management / record label	630 Recordings is music collective / record label that houses Eleventwelfth, Fuzzy, I, and Bagvs. They are also active in organizing music shows.	@630recs
Kolibri Records	Artist management / record label	Kolibri Records is a record label that houses Bedchamber, Grrri Gang, Jirapah, and many more. They are also active in organising music shows.	@kolibrerekords
Sounds From The Corner	Music media	Sounds From The Corner is a music media / content creator that curates independent music on YouTube. They initiated Archipelago Festival.	@sounds-fromthecorner

Name	Category	Description	Contact
Frekuensi Antara	Music collective / music media	Frekuensi Antara is a music collective / music media that provides reviews on the development of electronic music in Indonesia.	@frekuensiantara
Siasat Partikelir	Music collective / music media	Siasat Partikelir is a music collective that provides reviews on the independent music networks in Indonesia.	@siasatpartikelir

These initiatives stem from the need of community hubs for music communities, especially for new bands or musicians. The economic opportunities that arise from the music business are thanks to the rising productive age and middle-class market; in addition to the diverse funding sources, especially from the cigarette industry and the start-up industry. In short, the Jakarta music ecosystem comes up with different initiatives and turns them into new business opportunities.

The rise of the music entrepreneurs boils down to their ability to establish a network and collaborate with communities/collectives and companies as well as come up with initiatives that stem from their ability to innovate in a flexible and agile manner. They are able to observe the market potential, come up with attractive packaging, and utilise technology, particularly social media.

It is therefore undeniable that one of the contributing factors to a thriving music ecosystem is the number of music events, as music events have economic and social impact. It is a well-known fact that the biggest business opportunity for a band or a musician is live performance.

Music festivals are currently the biggest money-making vehicle in the Jakarta music scene. The past few years have seen a rapid rise in the Jakarta music ecosystem thanks to different types of music events and new music venues. Anyone can come up with music events in Jakarta; it's not only a game for professional event promoters or organisers to play. At present, many music communities/collectives, such as record labels, managements, even music media, come up with music events, not strictly for entertainment purposes but also to promote and market their own products.

From an artistic standpoint, music festivals and events in Jakarta have made innovative strides, such as by combining a music conference with a multi-genre festival. Some of these festivals also put forth the spirit of collaboration, whether between communities or with foreign institutions, such as the British Council. These festivals and music events also provide a space for new bands, such as Archipelago Festival, Synchronize Festival, Ornaments, dan The Other Festival, with their multi-genre and multi-generational spirit, meaning that they also foster important values such as collaboration, inclusivity in music genres, and regeneration.

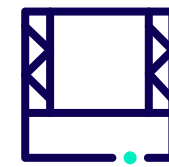
Emerging music events and festivals might indeed result in a music event bubble. This is a good thing since these events and festivals provide a space for bands and musicians to express themselves. The music event bubble may grant access for anyone wishing to come up with an event; however, it might be at the expense of proper management. The downside to having a myriad of music events with poor management is that these events might be prone to social issues, such as riot, lack of security, and sexual harassment. Another downside is the lack of variety to the performers at these events. Therefore, the music event bubble must be offset with proper and professional knowledge and execution.

To that end, a set of regulations or recommendations to propose a campaign for safe and comfortable music events must be in place. The music ecosystem should not only be viewed from the economic value of its movers and shakers; it is also necessary to have regulations and recommendations based on the audience's point of view to make sure that music events are also social events that everyone can have a good time and feel safe in.

In Jakarta, music entrepreneurs play a significant role that enables them to collaborate with communities and foreign institutions. Community and collaboration become a solid supporting network in the Jakarta music ecosystem. Furthermore, supporting factors and funding in the Jakarta music scene are robust only thanks to its tremendous music market, as its middle-class population with a strong buying power is growing, leading to a thriving music ecosystem and an active music-buying public in the city.

In addition to the market growth and active middle-class population, there are many other alternatives in the Jakarta music ecosystem, such as foreign institutions, government institutions, cigarette companies, the retail industry, and the start-up industry. The latter, in particular, has played a very significant role within the past few years, with ample funding support for music events, although start-ups largely focus on big festivals, not smaller-scale or community events.

The Jakarta government is also transparent with its assets, which are often used for events, such as the Jakarta Playhouse (GKJ) and Teater TIM. The Jakarta government also houses venues with varying degrees of capacity: small-sized venues, medium-sized scale, and big-sized venues. However, issues generally revolve around communication and bureaucracy since it requires a convoluted process to organise events at government-owned venues, with incoming proposals having to be subjected to a curation process by their administrators. Scheduling may also pose a problem since these venues must accommodate other types of arts, not only music. After the birth of M-Bloc Space, there have been more venues for music events in Jakarta. The challenge now is to have event concepts compete with one another to make music events more exciting.



b. Conditions of Music Venues and Music Infrastructure

The Jakarta music ecosystem is thriving because its music venues have been able to regenerate. There are plenty of music venues in Jakarta frequently used by music communities, although certainly not all venues are ideal or a great representation of what the city's music scene has to offer. However, there are indeed few auditoriums or conservatoriums for music events. A lot of the music venues make use of existing spaces, such as cafés or bars, coffeehouses, music studios, sports centres, hotels, and many others. These alternative spaces do have a significant impact on Jakarta's music communities.

One of the key factors in the development of the Jakarta music ecosystem is the emergence of new music venues. These new spaces, particularly the small- and medium-scale variety, have emerged at a fast pace, as more people are supporting the ecosystem, with café

and bar managers willing to lend their spaces for music events considering the tremendous market and branding potential that music possesses, especially among Jakarta youths. Cafés and bars may also use music events as part of their activation. Meanwhile, the business model that continues to be developed is venue leasing and profit-sharing.

Among the factors contributing to venue regeneration in Jakarta is the presence of music entrepreneurs at music venues or creative hubs. Some have business motives, but some others do have social motives, such as to develop a new marketing and branding pattern via music activities. Within the past few years, initiatives have been carried out by music practitioners to come up with new music venues. In Jakarta, new venues have been born, such as Kios Ojo Keos and M-Bloc Space. These two venues consistently organise music events and have important vision and idealism for the development of the Jakarta music ecosystem. New venues have also emerged in Jakarta-adjacent regions, such as Ear House in Tangerang (owned by the band Endah and Rhesa) and Kedutaan Besar Bekasi (Kedubes Bekasi). These communities are important because they are exempt from certain interests and provide new spaces for new bands or musicians. They are also accommodating careers although these bands or musicians rarely perform at larger stages owned by cigarette companies or music festivals.

The Jakarta government is also transparent with its assets, which are often used for events, such as the Jakarta Playhouse (GKJ) and Teater TIM. The Jakarta government also houses venues with varying degrees of capacity: small-sized venues, medium-sized scale, and big-sized venues. However, issues typically revolve around communication and bureaucracy since it requires a convoluted process to organise events at government-owned venues, with incoming proposals having to be subjected to a curation process by their administrators. Scheduling may also pose a problem since these venues must accommodate other types of arts, not only music.

Some of the venues that have consistently organised music events within the past few years are Kios Ojo Keos and M-Bloc Space, both of which came about as initiatives by practitioners in music communities. These music entrepreneurs, therefore, play a crucial role in creating new music spaces.

Other existing venues are managed independently, with the business model prominently being venue leasing and profit-sharing. Meanwhile, the government, via the Creative Economy Agency (Bekraf), provides assistance funding for infrastructure programmes. However, as Bekraf progressed into the Ministry of Tourism and Creative Economy (Kemenparekraf), programmes and policies are inevitably subject to change. Meanwhile, although cigarette companies also support the establishment of music venues via their hangout places, the downside to this type of initiative is these venues become identical with the cigarette companies and undoubtedly put the companies' interests ahead of simply having music venues as inclusive and independent hubs

Therefore, it is imperative to develop the ideal music venues and make them sustainable. The most important point is to develop an enticing business model to further develop a community or creative hub. Existing music venues such as Kios Ojo Keos and M-Bloc Space blend the concept of a music venue with other functions, such as bookstores, coffeehouses, record stores, etc. However, the bigger challenge is to design music venues that are inclusive, sustainable for business, gender-conscious, and able to foster multi-disciplinary collaborations for various communities.

The type of innovation as developed by M-Bloc Space proves the feasibility of the triple helix model of innovation that combines communities, the government, and industry practitioners,

making it something of an ideal venue that marks a functional shift from an abandoned government asset to a venue managed by music communities, who have a better understanding on how to run a music venue. However, this type of approach is also highly dependent on the policy of venue director/owner, who may have the option not to renew the lease upon its completion date.



Crowds enjoying a music show at Archipelago Festival. © British Council Indonesia

Table: Topology of the Jakarta Music Ecosystem

Topology of Ecosystem	Description	Positive Aspects	Negative Aspects
Music-entrepreneur	Practitioners from music communities that develop initiatives and innovations into a form of music business, ranging from record label, artist management, publisher, music promoter, music media, and music festival. Communities and collectives also play a highly crucial in Jakarta in the development of music entrepreneurship as well as in the active organisation of music events and festivals	Ability to establish networks and collaborations, significant ability to read the market following the needs of their communities, ability to establish agile and flexible music entrepreneurship to establish bargaining power against corporations	More interested in promoting their products, establishing contestation and an image of exclusivity
Cigarette companies	Cigarette companies offer unlimited access and funding	Massive production and promotional funds, ample support in all scales of necessities	Hit by regulations, prone to co-optation and commodification, too focused on targets and segmentation, less focused on long-term ecosystem
Art showcase at high school/ campus	High schools and universities often organise annual music events, usually inviting renowned musicians to draw in large crowds	Massive promotion, focused on the exciting youth market, providing a space for independent bands	Lack of space for newer bands, segmentation limited to teenage taste
Start-ups	Start-ups are among the most thriving industries in Jakarta. The start-up industry has shown its support in recent years towards the city's music communities.	Massive production and promotional funds, ample support in all scales of necessities	Limited to big festivals, less concerned with micro-gigs, prone to unsustainability

Source: Compiled by authors

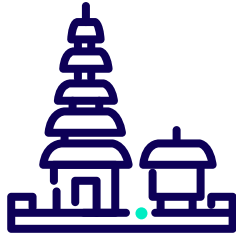
c. Conclusions and Recommendations



Based on the above discussion, the following are our recommendations for the Jakarta music ecosystem:

1. Continuously support music entrepreneurs via more inclusive and multi-disciplinary approach to incite innovations.
2. Support the triple helix model of innovation (government-private company-community) to promote inclusivity in creating open, accessible performance venues
3. Support the regeneration of bands and musicians via music events.
4. Establish network and connectivity between music professionals and music communities via forums or associations.
5. Support the ideal business model for music community or music venue management.
6. Establish programmes or campaigns to maintain music communities and venues and improve awareness on the importance of inclusive spaces for improved regeneration.

3. Music Ecosystem in Bali



a. The Role of Bali-Bali and Balnesia

Bali has a unique music ecosystem with two dominant genres: Bali-Bali and Balnesia, creating their ecosystems and characteristics in the process as well as giving the Bali music ecosystem as a whole its own edge.

Between the two, language is the distinguishing factor. While Bali-Bali uses Balinese, Balnesia uses non-Balinese languages (Indonesian or English) in their repertoire. Despite the difference, these two genres are able to co-exist in music events. However, Bali-Bali is inevitably more widely consumed due to its language being more easily understood by Bali locals. Access is another key factor in the development of Bali-Bali, as the genre is often performed at commercial events, government events, school events, corporate events, even traditional events, particularly at events of the Banjar people. The sheer breadth of public access to this particular genre enables it to be widely accepted by Balinese, especially in rural areas. Bali-Bali bands such as Lolot, Joni Agung, and HarmoniA are hugely popular among modern Balinese, dominating stages in the region and racking in a legion of fans. Bali-Bali is the master of its own home turf.

Conversely, Balnesia is more readily associated as an independent form of music-making in Bali. The development of Balnesia is admittedly inextricable from the rise of bars, cafés, and creative hubs in Bali, which then become music venues. However, upon closer look, the development of Balnesia is limited to only a few regions, such as Denpasar and Badung, where cafés and bars are in large numbers. In turn, these spots boost the development of Balnesia.

The Bali music ecosystem, especially in terms of its independent music communities, is on the rise due to the established network, the influence of social media, and above all, the accessibility of information as several Javanese bands make Bali their prominent tour destination. As a result, this fosters the growth of Bali-based bands with their expansive networks in Jakarta, Bandung, or Yogyakarta. The success of Superman Is Dead, Navicula, Dialog Dini Hari, and The Hydrant boils down to the Midas touch of manager Rudolf Dethu in establishing networks outside of the island.

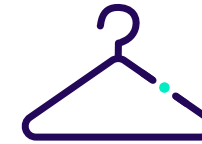
The strength of the Bali music ecosystem is among the island's many social capitals. Following the Bali Against Reclamation movement, more Bali-based bands have emerged, sporting more diverse genres. A couple of decades ago, the independent music scene in Bali was heavily steeped in punk and metal. With the current wave of independent musicians, there are newer and fresher shades of folk, pop, rock, and even electronic music. It is evident to see that the Bali music ecosystem has a solid

social capital, with rising social engagements among like-minded communities. This is reflected in the Bali Against Reclamation movement, in which different types of bands, whether from Bali-Bali or Balnesia, from older generations or younger, joined forces to rage against the machine. Furthermore, the more open and tolerant nature of Bali's social setting and society serves as an allure for people outside of the island to come around and take part in the Bali music scene, prompted by less than enthusiastic music scenes in some major Indonesian cities due to the burgeoning Hijrah (Islamic hyperreligiosity) trend.

Among the defining characteristics of Balinese music is the strong influence of social activism. Balinese musicians are big on delivering social criticisms via music. Aside from the Bali Against Reclamation movement, plastic waste and other hot-button topics are being talked about by music communities on the island. The strong influence of social activism in their music has also prompted non-governmental organisations such as Walhi and Kopernik to use music in their social and environmental campaigns to ensure effectiveness. As a result, there is an indomitable synergy in Bali between music and social activism.

Aside from Bali-Bali and Balnesia, other genres such as coffeehouse music, Top 40 music, and electronic music, dominated by the DJ culture, are also thriving in Bali thanks to the rise of bars, cafés, and beach clubs in Bali, especially in the more touristy areas such as Kuta, Seminyak, and Canggu. However, these genres are mostly used merely to attract tourists instead of making any significant contribution to the development of local music communities. Often, beach clubs in Bali organise electronic music events and invite national and international DJs as a gimmick to attract tourists.

One of the breakthroughs that came about in the Bali music ecosystem is the Bali Music Awards. First held in 2019, this award show proved to further boost the productivity of Balinese musicians, whether Bali-Bali or Balnesia, as it became a token of appreciation as well as a proving ground for Balinese musicians. The Bali Music Awards also ensures a closer relationship between Bali-Bali musicians and their Balnesia counterparts and further scrapes away the disparity between the two genres. Socio-culturally, these two genres are able to co-exist and cater to their respective market and segmentation



b. The Role of Local Clothing Brands in the Bali Music Ecosystem

The most potent supporting factor in the Bali music ecosystem is the local clothing brand industry. In the island, local clothing brands have a strong grasp due to their wide-ranging market potential. Nearly all Bali-Bali and Balnesia musicians are endorsed by local clothing brands via funds or products; special products would be crafted for these musicians. It is also commonplace for Balinese musicians to become clothing brand entrepreneurs themselves.

These local clothing brands normally offer their support for Balinese bands by funding their albums, gigs, or tours or providing products. However, this also means that these brands

have yet to fully penetrate the music ecosystem, with minimal long-term investment in the music sector, whether coming up with a record label, an event organiser, a publishing company, a booking agent, a music festival, a music media, or any other supporting sectors in the music ecosystem. These roles are often taken over by local clothing brands, such as PICA Fest and PICA Magz, who run their own music festival and clothing brand. The festival mostly features Balinesia bands, although Bali-Bali bands have been incorporated in the past year.

These local clothing brands often face difficulty in terms of having a limited budget, especially with the fairly tight competition in the industry as imported clothing brands emerge. Therefore, the role and support of clothing brands in Bali remain partial and temporary. As of late, automotive company Honda has also emerged as an unlikely source of funding for music events.

The Bali government does not have a lot of policies related to the development of the music ecosystem. Thus far, the government merely facilitates access for music events and festivals. Most government events have Balinese bands in their roster of performers, especially from the Bali-Bali genre. Moreover, government-owned assets such as leisure centres, art buildings, and open fields are typically used for music events. Thus, it can be said that the government has yet to provide much long-term support in the context of developing the music ecosystem and that the support remains rather partial.

The most prominent issue in the Bali music ecosystem is the low level of investment in music and understanding of the music business, in addition to the lack of marketing and managerial acumen. In addition to the business aspect, there is also a socio-cultural aspect, wherein bands who use Balinese in their repertoire are more appreciated compared to those using other languages. Another issue is the high accommodation costs for national and international acts due to geographic limitations. This often proves to be a hindrance for music events that aim to invite national and international acts.



c. Conditions of Music Venues and Music Infrastructure

Venues play an important role in Bali. The Bali music ecosystem is supported by a myriad of music events hosted at creative hubs, bars, cafés, open fields, banjars (performance spot available at every Bali district), leisure centres, art buildings, and beach clubs. The rise of these venues undoubtedly spurs the growth of the Bali music ecosystem; furthermore, it is not difficult to seek and access music venues in Bali with less complex bureaucratic process since venue owners or managers are always on the lookout for new programmes and contents to promote their cafés or bars. Therefore, music performance is always the way to go, with each café and bar organising new music events weekly.

Access to venues is still highly determined by the music ecosystem. Arguably, there are more venues for Bali-Bali musicians, ranging from open fields, banjars, leisure centres, and art

buildings. However, Balinesia musicians mostly perform at cafés and bars. However, not all cafés and bars feature independent artists. Geographically speaking, Balinesia music is centred around Denpasar and Badung; although Balinesia communities can also be found in other regions, they are not as active as those in the aforementioned two. Balinesia acts also generally perform at open fields and music festivals, aside from cafés and bars.

Support by the Bali government is limited to facilitating easy permits and use of government-owned assets for music events. Rumah Sanur is one of the creative hubs that frequently hosts music events. However, Rumah Sanur is facing an issue on how to build an ideal business model that will ensure its sustainability. At present, Rumah Sanur develops its business model by leasing portions of its compound for commercial use, including coffeehouse, restaurant, and wine bar. The creative hub is also open to collaborating with other parties, such as cigarette companies, to organise music events.

Table: Topology of the Bali Music Ecosystem

Topology of Ecosystem	Description	Positive Aspects	Negative Aspects
Bali-Bali	Bali-Bali is a genre of music that uses local language (Balinese) in its repertoire. This genre is more easily understood and accepted by Balinese people, whether in urban or rural areas. This genre is thriving due to the relatively easy and wide-ranging access to event organisation, as Bali-Bali can take part in corporate events, government events, school events, and traditional events. The masses can also easily access this genre when performed at public events or traditional banjars (performance spot available at every Bali district).	Has a strong identity, in touch with locals, has characteristics that are easily understood and accepted by Balinese people	Only accessible at a local scale
Balinesia	Balinesia is a genre of music that uses languages other than Balinese (especially Indonesian and English) in its repertoire). Balinesia is identical with independent music. The development of this genre is influenced by the rise of creative hubs, cafés, bars, and clubs, which then become venues for showcasing the genre. However, the development of Balinesia is limited to Badung and Denpasar. This genre is less well-received compared to Bali-Bali due to the difference in socio-cultural context (particularly language) as well as in geographic context. However, both ecosystems co-exist.	More easily accessed by nationwide public	Limited access due to stronger geographic development only in Denpasar and Badung
Local clothing brands	Local clothing brands often support music communities by providing funds and products, organising gigs, funding albums and tours	Providing a space for new bands, serving as an alternative to cigarette companies, focused on community empowerment	Limited production and promotional funds, reliant on personal taste and friendship, prone to being unsustainable
DIY/Collective/Community	Communities or collectives often organise music events independently, usually at music communities	Providing a space for new bands, serving as an alternative to cigarette companies, focused on community empowerment	Limited production and promotional funds, reliant on personal taste and friendship, prone to being unsustainable

Source: Compiled by authors

d. Conclusions and Recommendations



Based on the above discussion, the following are our recommendations for Bali music ecosystem:

1. Establish a network and connectivity among music venues.
2. Recommend more inclusive alternative funding for creative hubs.
3. Organise a network among NGOs to support social and environmental campaigns via music.
4. Recommend more music entrepreneurs.
5. Establish synergetic programmes for international-scale festivals.

Tabel: Comparison Matrix of 3 Music Ecosystems in Indonesia

	Music Ecosystems		
	Bandung	Jakarta	Bali
Relations Between Practitioners	DIY communities/ collectives, local clothing brands, and cigarette companies	Music-entrepreneur	Bali-Bali (Balinese pop music in Balinese), Balinesia (Balinese pop music in Indonesian or English or other non-Balinese languages), and electronic music or coffeehouse music
Supporting Industries	Local clothing brands and cigarette companies	Foreign institutions, government (Bekraf), cigarette companies, retail industry, and start-up industry	Local clothing brands, cafés/bars, cigarette companies, and automotive industry (Honda)
Venues	<p>Following the dissolution of Spasial in 2019, there has not been any other inclusive community for music events in Bandung. Music events normally take place at alternative venues such as coffeehouses or cafés, auditoriums of foreign institutions, military fields, or community hubs owned by cigarette companies (often referred to as “hangout places”).</p> <p>Music communities in Bandung rarely use government assets such as Bandung Creative Hub, Taman Musik, or Dago Tea House due to cost and bureaucracy issues. Music festivals in Bandung are regularly sponsored by cigarette companies such as Soundations (sponsored by Sampoerna) and Hellprint Festival (sponsored by Djarum Super).</p>	<p>There is a wide range of music venues in Jakarta, from small scale, medium scale, to large scale venues. Music studios, community hubs, and music festivals also contribute to Jakarta’s lively music scene. New community hubs play a significant role in the Jakarta music ecosystem, such as Kios Ojo Keos, Studio Rossi Musik, Studio Palembang, and M-Bloc Space.</p> <p>On the other hand, there are more music festivals in Jakarta than ever, such as Synchronize Festival, Archipelago Festival, We The Fest, Lokatara Festival, Joyland Festival, The Sounds Project, and Ornaments.</p>	<p>Music venues in Bali are fairly diverse, ranging from traditional banjars (performance spot available at every Bali district), cafés/bars, community hubs, and open fields. The Bali government is also supportive of the music ecosystem and grants permit with relatively little hassle. Meanwhile, government-owned buildings and fields are also used for music events by communities.</p> <p>However, the rise of bars and cafés, particularly in Denpasar and Bandung, is particularly noteworthy for the development of Balinesia, where the genre is more widely received. On the other hand, other parts of Bali are relatively more welcoming of the Bali-Bali genre.</p> <p>In Bali, the socio-cultural aspect is significant. One of the biggest music festivals in Bali is PICA Festival, best known for being supported by local clothing brands.</p>

Source: Compiled by authors

D. Discussions and Recommendations



Lapalux show at The Other Festival, a series of UK/ID Festival 2018 events. © British Council Indonesia

A. Artistic and Cultural Values

A discussion on the music ecosystem is inextricable from a discussion on how music is used to develop economic, social, and cultural values. In particular, to amp up the economic value of music, music entrepreneurs are required to come up with innovations in the music business.

To ensure that a music ecosystem in a city properly grows, supporting factors other than musicians and fans come into play. A music ecosystem will only grow and thrive if supporting sectors such as record labels, promoters, booking agents, venue owners, music media, event organisers, and music festivals are also growing and thriving. Within the past few years, music communities have come up with initiatives for these supporting sectors, especially in Jakarta, to ensure that the music business develops innovatively and attractively. New music businesses are more flexible and cater to personalised needs.

However, based on our observation, there is a lack of balance in the dissemination of music entrepreneurs. In cities like Bandung and Bali, a lot of music practitioners are still dependent on cigarette companies and local clothing brands. Therefore, music events that take place are seemingly no more than extensions of the cigarette industry. As a result, music events often revolve around promoting products (cigarette products or local clothing brand products) rather than be a proper innovation or a campaign carried out by music communities via music events.

To properly utilise music for economic, social, and cultural gain, music entrepreneurs must emerge from local communities. Music entrepreneurs must be urged to come up with innovations that are required to solve problems in the music ecosystem. To this end, community

empowerment is the key, since there has been a noticeable power imbalance between music communities and capital owners, which is undoubtedly prone to exploitation and commodification instead of collaboration and co-creation. Community empowerment is important to avoid exploitation and commodification by corporations or governments. To this end, there has to be a collective awareness that communities play an important role in the music ecosystem.

Community empowerment is important to develop so that it can lead to music entrepreneurs that genuinely bring about innovations into the music ecosystem, using an adaptable, flexible, and multi-disciplinary type of approach. This means that music communities must come up with flexible initiatives by utilising technology and social media. In addition, innovations in music events must also be urged to improve the diffusion of innovation and to bring out a sense of newness in music events and festivals that emphasise on social, not only economic, functions.

Music does not merely revolve around economic values. Music communities have also spearheaded the use of music as part of social activism. These are the communities that must further incorporate gender, tolerance, and environmental issues into music as part of social inclusion.

It is of utmost importance to have principles on networking, collaboration, or co-creation in encouraging the diffusion of innovation. Music communities can establish a network or collaboration with other communities or with government or foreign institutions. Some of the examples are Archipelago Festival's collaboration with various music communities and foreign institutions, including the British Council, and M-Bloc Space's collaboration with the Jakarta government. Therefore, forums to help the establishment of networks and collaborations, which will then incite music-related innovations, are required.

An example of this type of forum is London's Wired4Music². Wired4Music is a platform that offers opportunities in the music industry for Londoners, from being a musician, a band manager, a radio producer, a technician, to a novice A&R (artists & repertoire) person. Furthermore,



Conference atmosphere at Archipelago Festival 2018. © British Council Indonesia

several Wired4Music members are involved in the making of music-related policies in London. Wired4Music does indeed have a spirit for collaboration and co-creation since a lot of its members hail from a multi-disciplinary culture. To date, Wired4Music has up to 2000 members³.

Wired4Music offers practical help and support as well as resources to its members in their effort to realise their musical ideas. The platform's programmes include incubation, training, internship, conference, workshop, open mic, and event promotion via networking with fellow Wired4Music members. The platform champions diversity to its core. Wired4Music offers opportunities for potential musicians, producers, event managers, promoters, and campaign officers to gather, collaborate, and learn about the ins and outs of the music industry. The platform is funded by The National Lottery, Arts Council England, and The National Foundation for Youth Music.

This programme provides a particular experience for its members, that eventually enables them to develop talents and skills as well as confidence. The main goal is to produce different sets of ideas and innovations and open the door to a host of difficulties that the members might not have had access to otherwise.



Prabumi's performance at the closing ceremony of Wallacea Week 2018. © British Council Indonesia

² For further information, please access www.wired4music.co.uk (accessed on 3 February 2020)

³ According to a data by "This Must Be The Place" (Sound Diplomacy, September 2019)



Archipelago Festival 2018. © British Council Indonesia

B. Network of Supporting Industries and Funding

Every city has its network of supporting industries and funding for the music ecosystem according to the city's demographics and characteristics. At the same time, cigarette companies are the biggest supporting industry and provide the largest funding for music events, from micro gigs at coffeehouses to macro gigs such as Festival Soundrenaline.

Cigarette companies are actively investing in music communities, especially since Government Regulation No. 109/2019 was issued, which limits cigarette distribution and promotion. Limitation for cigarette promotion in mass media and public places has resulted in cigarette companies targeting music communities, which are largely dominated by young people. As the youth market continues to thrive, cigarette companies are becoming increasingly persistent in penetrating music communities across the archipelago via music events in major Indonesian cities, including Bandung, Jakarta, Yogyakarta, Surabaya, Malang, and Bali, as well as small cities such as Garut, Cimahi, Sukabumi, and many others. Cigarette companies are so actively and massively targeting the independent music ecosystem via a range of events, from gigs, festivals, workshops, to international tours. The lack of involvement on the government's part in supporting musicians led to cigarette companies playing a significant role in the Indonesian music scene within the past few years.

Due to limited regulation, cigarette companies are not allowed to liberally promote its products to the public. Therefore, these companies ended up establishing representatives from the music communities to promote their products at music events. These representatives are often referred to as Special Brand Ambassadors (SBA), whose task is to come up with music events under the interests of the corresponding cigarette companies. SBAs are normally well-known figures from music communities, such as musicians, record label owners, event organisers, or music journalists, or simply young people active in music communities. However, this initiative is not without its particular struggles. Some of the challenges faced by events organised by cigarette companies are the lack of space for new bands, as only those above 18 are allowed to enter, as well as the susceptibility to exploitation and commodification.

Within the past few years, especially in Jakarta, the start-up industry has given something of a new lease of life to the music ecosystem in terms of support and funding. A good number of festivals in Jakarta are sponsored by start-up companies, such as Bukalapak, who funded the tour for Polka Wars and The Panturas entitled "Bukamusic: Connected Tour 2018", which visited Semarang, Surabaya, Bali, Malang, Yogyakarta, and Bandung. Start-ups have become a fairly significant funding option for musicians due to the potential of young people in the music sector, as made evident in their support for big festivals. However, start-ups are less concerned with properly developing the ecosystem and long-term regeneration.

In some cities, there is a myriad of supporting industries and funding options from various sectors, as per the respective city's characteristics. In Bandung and Bali, for instance,

local clothing brands often support and fund the music ecosystem via producing live shows, sponsoring gigs, funding recording sessions and album production or funding national and international tours. However, support from local clothing brands is less massive compared to support from cigarette companies or start-ups.

The interests of cigarette companies, local clothing brands, and start-ups often lie in promoting bands or products via music events. Very few make long-term investments and properly support the development of the music ecosystem, such as via the establishment of new entities (record labels, promoters, music festivals, music publishers, booking agents, artist management, or music venues), making their support and funding partial, temporary, and short-term. Therefore, the presence of music entrepreneurs is necessary to come up with initiatives and innovations for further development of the music business. Meanwhile, communities need to serve more as partners, instead of corporate extensions.

To boost the supporting and funding sectors, access to a wider network is a requisite, such as by collaborating with foreign

institutions like the British Council or carrying out an exchange of musicians between Indonesia and the UK, as done by the British Council with Archipelago Festival and The Other Festival, with the British Council providing speakers, musicians, artists, and producers to appear at these events. This collaborative and networking scheme can also be used to realise music events with social messages and campaigns, instead of merely promoting products. Therefore, it is necessary to have platforms or mediums that offer grants for artists, musicians, and creative hubs.

The government must also be urged to take part in developing the music ecosystem, with more innovative efforts rather than simply granting permits to do a performance or to borrow an asset for the performance. The government needs to realise that music has a lot of potentials, be it economically, socially, and culturally. One of the innovations that came about when it comes to funding scheme has been done by The National Lottery di London⁴. Taxes culled from lotteries are used to develop the music ecosystem via projects and initiatives, such as The Big Music Project, which funds the careers of up and coming musicians in the music industry via lottery taxes. Up to this point, this initiative has disbursed 42 million pounds to fund approximately 17,000 music projects. This means that developing the music ecosystem requires commitment and correct use of taxes for long-term projects, not only annual events or festivals to commemorate the anniversaries of local governments. This grant scheme also needs to be clear, transparent, and well-measured for the long-term development of the music ecosystem, considering the Indonesian government has budgeted approximately 5 trillion Rupiah to develop culture.

⁴ For further information, please access www.national-lottery.co.uk/life-changing/project-big-music (accessed on 3 February 2020)

C. Music Venues and Music Infrastructure

Music venues and music infrastructure are the most common issues faced by music practitioners in any city. Indeed, few music venues truly represent a city's music ecosystem and are committed to developing the music ecosystem in the city. Not every city has the ideal venue, be it in the form of a concert hall, conservatorium, or auditorium hall, one that is aesthetically ideal for music events or music festivals. On the other hand, various scales of music venues are required to develop the music ecosystem, ranging from small venues (pubs, bars, cafés, coffeehouses), medium venues (auditorium halls, leisure centres, art buildings, community hubs), and large venues (public fields and stadiums). All of these venues must exist and thrive to keep a city's music ecosystem alive.

Thus far, music practitioners normally make use of commercial spaces such as pubs, bars, cafés, and coffeehouses for music events. Although a city government typically owns building assets, most communities are reluctant to have their events take place at government-owned venues due to complicated bureaucratic process, difficulty in procuring access and information on how to rent a venue, and congested scheduling, since government venues can be used for different types of events, not only music events.

Economic and social issues are the main issues often dealt with in the development of music venues and music infrastructure. The lack of the ideal business model to develop music venues contributes to economic issues, as financial management for music venues is usually limited to an exchange of promotion, venue leasing, and profit-sharing. Several venues are then used as mere extensions of cigarette companies. Leasing cost, in particular, has always been the main issue in maintaining a music venue, as many venues have been forced to shut down due to rising leasing cost. On the other hand, the shutdown of music venues does often occur due to social issues, as conflicts with locals would arise over the loud nature of music events, which in turn lead to brawls or even riots.

From a business standpoint, venues, in general, are independently managed or reliant on promoters or event organisers to come up with events, with venue leasing and profit-sharing being prominently used as the business model. Very few innovations are made for the development of music venues and music infrastructure, especially concerning business model and management. The lack of private assets also often proves to be a hindrance for the development of music venues and music infrastructure, with managers having to lease venues from other parties.

Therefore, it is important to note what is currently being developed by M-Bloc Space via the triple helix model of innovation, which involves the government, communities, and industry practitioners. Some government assets are now being professionally managed by industry practitioners to then be used by communities, considering a lot of these assets are abandoned. Thus, these practitioners run the assets to cater to the needs of music communities, since they have a better understanding on their own needs as opposed to the government. This is why cooperation and collaboration between the government, industry practitioners, and music communities are necessary to establish a long-term commitment in the management of music venues, considering it has been proven time and again that abandoned government assets do have economic values.



Kimokal performance in the UK as part of the New Commissions residency, 2018. © British Council Indonesia

From a social standpoint, different types of advocacy and campaigning need to be developed on how to run a venue to avoid horizontal conflicts, particularly with locals. A music think-tank would be able to provide recommendations on how to run a music venue and further realise a music venue that also serves as an important public space to incite innovation, creativity, and tolerance. In addition, advocacy and campaigning to ensure that music venues are safe, comfortable, and gender-friendly for everyone are of equal importance.

In May 2019, London Mayor Sadiq Khan issued a programme entitled Cultural Infrastructure Plan for Greater London, which contains a map of cultural infrastructure in the capital, including its connectivity with a host of data related to transportation, city planning and demography, grant and funding programmes, research, and new policies. Open-source data on the cultural infrastructure mapping can be accessed by anyone who wishes to learn about the actual conditions of music venues and music infrastructure in London. The Cultural Infrastructure Plan involves 33 local authorities who co-operate with one another to establish the development plan for cultural infrastructure as well as identify opportunities, as part of the London government's long-term plan.

To support economic boost as well as security at London music venues, The Night Czar serves as the Mayor of London for the supervision of bars and nightclubs across the UK. The Night Czar aims to ensure the sustainability of music venues all over the UK by sharing information and carrying out sharing sessions for music professionals in London. Ever since coming into force in 2016, The Night Czar has been hard at work to strengthen and protect music venues across London by bringing together business owners, developers, police officers, locals, communities, local governments, and venue attendees.

The Night Czar is a platform for Londoners to discuss their experiences upon visiting nightclubs, being out on the streets at night, or taking public transportations at night. Also in 2018, the Women's Night Safety Charter programme came into force to improve safety and convenience for women at night. The Night Czar is highly concerned with the safety and convenience of Londoners, especially the female population.

Similarly, to protect grassroots venues in London, London Mayor Sadiq Khan came up with a programme/campaign entitled Sounds Like London, due to the difficulty faced by many venues in the UK as a result of gentrification, which results in low public turnout at bars as immigrants are becoming increasingly hesitant to visit bars. One of the campaigns carried out by Sounds Like London is the organisation of music events aimed at up and coming musicians, which tally up to 200 gigs per year, nearly every single day in the month of June. This campaign aims to bring back Londoners into bars as well as to give opportunities for women to take part in the UK music industry and recommend diversity in the music industry. This campaign is highly relevant and highly needed in Indonesia so the music industry can become less male-dominated. Programmes focused on music venues and music infrastructure must indeed involve a myriad of aspects, ranging from city planning, infrastructure, transportation, data and mapping, as well as safety and convenience of music venues. It is also of equal importance to establish a network between music industry practitioners, music communities, the government, police officers, and relevant authorities. To achieve this, it would require a long-term commitment to developing the music ecosystem.

⁵ Based on an interview with Nuran Wibisono, who won a residency competition organised by the National Book Committee. His residency lasted for three months (October-December 2019), during which he carried out a research on music events and festivals in London. The interview was conducted via telephone on 26 January 2020.

⁶ For further information, please access www.london.gov.uk/sounds-like-london. (accessed on 5 February 2020)

D. Recommendations

Based on discussions and case studies on the music ecosystem in Indonesia and the UK, recommendations will now be made based on the observations and analyses on a wide range of issues related to the Indonesian music ecosystem, particularly in Bandung, Jakarta, and Bali. It is expected that these recommendations will eventually result in regulations or policies that commit to the development of the Indonesian music ecosystem as well as improve the cultural collaboration between Indonesia and the UK to realise more inclusive programmes. Following are the recommendations:

a. Establish a music think-tank

Advocacy is one of the main issues in the Indonesian music ecosystem, as advocacy is lacking among music communities.

In many regions, music practitioners are rarely involved in music-related policies made by the government. The establishment of a music think-tank is expected to serve as a middle man or a mediator between the music communities and the government. A music think-tank may also carry out a series of research, campaigning, lobbying, and advocacy on the music industry and have the results accessible by anyone. The Indonesian Art Coalition and the Indonesian Music Conference (KAMI) have indeed taken on these roles; however, a think-tank would cater more to the needs of grassroots communities.

b. Boost community empowerment

Imbalanced power relations is a classic tale between music communities or practitioners and corporations or the government.

As a result, corporations (especially cigarette companies) are highly dependent on music communities when it comes to organising music events, making the music ecosystem seemingly no more than an extension of corporations. The driving force behind music communities is music entrepreneurs, who come up with record labels, promoters, event organisers, booking agents, music festivals, and music media as supporting sectors in the music ecosystem. However, diffusion of innovation is the main requisite to the birth of music entrepreneurs, before they can come up with their own initiatives and innovations in the music industry and have the bargaining power against sponsors. This will ensure a more symbiotic relation between communities and corporations/the government. Community empowerment will also ensure a more inclusive role for communities, such as to promote the inclusion of women in the music industry, to campaign for convenience at music events, and to create social values from music. One of the key factors in realising a diffusion of innovation is the establishment of various networks and collaborations among stakeholders (community with community, community with sponsor, community with government or community with foreign institution). Therefore, it is important to have a platform that provides information for music stakeholders, which in turn will enable them to seek and create collaborations.

c. Create innovations under the government grant scheme

Support for access and funding for the music ecosystem usually comes from private parties (cigarette companies, local clothing brands, alcohol companies, telecommunication companies, banks, or start-ups). However, these supporting schemes do present their limitations in terms of regulations, or their support may only go as far as promoting products. Support from these

industries is also usually short-term, without any real commitment to fully delve into the music business. **Therefore, it is necessary to have a new source of funding, a grant scheme that is sourced from the government or a foreign institution, since cooperation among stakeholders is essential to assist in the funding and other supporting aspects, especially when it comes to the government's commitment in establishing a music ecosystem in all regions.** Law No. 5/2017 on Culture Advancement and Law No. 24/2019 on Creative Economy then ought to be allocated for this government grant scheme, especially with the existence of the Culture Representatives Fund that could be utilised to further ensure the government's commitment to establishing a music ecosystem in all regions. The government is expected to come up with innovations for this grant scheme.

d. Establish social campaigns to maintain music venues

The lack of awareness among music communities to maintain music venues is possibly the biggest issue for Indonesia's music venues.

Therefore, campaigns and lobbies are of great importance to mobilise all levels of society, starting from the government, business owners, communities, and locals on the importance of music venues and their part in creating social cohesion, since music events have real-life implications in the form of taxes, for instance, as well as serve as a driving economic force for other sectors, including transportation, hotel and tourism, design and merchandise, and culinary. Therefore, initiatives and programmes must be in place to raise awareness among communities and locals on the importance of caring for music venues or cultural spots. This will ensure social cohesion as well as boost the local economy.

e. Establish a model of innovation to establish music venues and music infrastructure

Music venues are indeed a complex issue not only due to its social but also economic implications. At present, it does seem like music venues are standing on their last legs, as one issue after another, mostly regarding management and business model, arises and hinders further growth. **Therefore, we suggest carrying out workshops on music venue management to resolve this issue.** In addition, developing a network between the government, music communities, and music industry practitioners appears to be a viable model, especially considering the number of abandoned government assets, which can be managed by communities and industry practitioners, with a better understanding on the needs of grassroots communities. International grants can be used to improve the state of music venues and other cultural spots. To that end, we believe that a triple helix model of innovation (between industry practitioner, government, and community, or between community, industry practitioner, and foreign institution) is a viable model worth developing as part of the innovation in managing music venues.



Chris Massey working on the collaboration track by Sprechen Music and Kimokal in Manchester, 2018. © British Council Indonesia

Table: Matrix of Issues and Recommendations

Issue	Recommendation	Expected outcome from UK-ID collaboration
Music-related policies	Establish a music think-tank in central government and regional government	<p>a. Establish collaboration between the government and a UK-based music think-tank to improve awareness on developing the music ecosystem</p> <p>b. Establish workshops or focus group discussions to initiate a music think-tank, which will serve as a middle man based on the needs of music stakeholders as well as fight for the interests of music stakeholders in central government and regional government</p>
Artistic and cultural values	Empower communities by creating a platform to improve collaborations and in turn produce music entrepreneurs	<p>a. Organise workshops on the music business using the incubation scheme to give birth to music entrepreneurs</p> <p>b. Actively establish a platform and encourage discussions among communities to establish a collaboration network</p> <p>c. Establish a website-based platform and an app-based platform to encourage information disclosure among music practitioners, who then will create multi-disciplinary works</p> <p>d. Initiate and encourage non-governmental organisations to become more active in supporting music as part of social activism.</p>
Network of supporting and funding industries	Create innovations for the government grant scheme	<p>a. Create an informative platform on grant schemes for the music ecosystem</p> <p>b. Encourage and improve the capacity of industry practitioners, particularly local clothing brands, to come up with their business model and properly invest in the music business</p> <p>c. Recommend the grant scheme to the central government and the local government to carry out long-term programmes for the music ecosystem</p>

Table: Matrix of Issues and Recommendations

Issue	Recommendation	Expected outcome from UK-ID collaboration
Music venues and music infrastructure	Establish social campaigns on how to maintain music venues	<p>a. Establish social campaigns in the media on how to maintain music venues</p> <p>b. Establish a map and a network of music venues in Indonesia</p> <p>c. Establish an informative platform on the mapping of music venues and music infrastructure in Indonesia</p>
Music venues and music infrastructure	Establish a new model of innovation to regenerate music venues and music infrastructure	<p>a. Establish the triple helix model of innovation (music communities, music industry practitioners, and the government) to manage abandoned government assets</p> <p>b. Organise workshops and forum group discussions on music venue management</p> <p>c. Provide information on the available grant schemes for music venues and music infrastructure</p>

Source: Compiled by authors



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