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Bridging Policy and Practice: Reforming Indonesia's Creative Economy Framework for Music and Visual Arts

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ABSTRACT: Indonesia's creative economy contributed significantly to national GDP, yet music and visual arts remain underrepresented despite their cultural importance. This study aims to explore the policy and implementation gaps that hinder their inclusion. Using a qualitative policy analysis, the study identifies barriers such as inconsistent regional adoption of policies, lack of operational guidelines for intellectual property valuation, limited financing access, and weak royalty governance. The findings show that regulatory support often does not translate into tangible benefits for music and visual arts stakeholders. Royalty distribution is still opaque, financing tools remain difficult to access, and export initiatives rarely prioritize intangible cultural products. These challenges are more severe in rural areas due to limited outreach and infrastructure. To ensure inclusivity, the upcoming 2026–2035 Creative Economy Masterplan must adopt broader metrics beyond GDP encompassing cultural participation, regional equity, and digital engagement. Institutional coordination, transparent governance, and grassroots empowerment are critical to aligning national ambitions with ground level realities.

Keywords: Creative Economy, Policy Implementation, Music Sector, Visual Arts, Intellectual Property, Regional Equity, Cultural Participation.

INTRODUCTION

ndonesia's creative economy contributes notably to national development, especially through fashion, culinary, and craft industries. However, music and visual arts although culturally significant remain underrepresented. This research highlights the gap between the visibility of these sectors and their actual policy support (Mahmudah et al., 2024; Noer, 2021).

The Indonesian government shows strong policy commitment through the establishment of a dedicated ministry and the enactment of the Creative Economy Law (UU 24/2019). However, such efforts have not yet translated equally across subsectors, leaving music and visual arts behind(Dellyana et al., 2023; Hatammimi & Afanassieva, 2022). Policy frameworks have evolved to reflect a multi stakeholder approach that fosters collaboration among public institutions, private sector actors, and local communities (Mayarni et al., 2023; Rosyadi et al., 2021). Such frameworks facilitate a paradigm shift from traditional industrial models toward more dynamic, knowledge based economic systems (Nur et al., 2022).

Notwithstanding this progress, the distribution of support and benefits across the creative economy's subsectors remains uneven. Fashion, culinary, and craft have seen robust growth and international visibility, leveraging digital platforms, heritage branding, and export friendly commodities to thrive (Faturrohman et al., 2023; Sukma et al., 2018). Fashion exports capitalize on Indonesia's textile diversity, while culinary exports showcase rich gastronomic traditions. These sectors have also successfully integrated digital technologies to access global markets (Syairozi et al., 2023).

In contrast, music and visual arts remain underrepresented in Indonesia's creative economy landscape. Despite their critical role in sustaining cultural identity and preserving historical narratives, these sectors receive comparatively less financial support and institutional prioritization(Fahmi et al., 2016; Firmansyah et al., 2024). The marginalization of these arts oriented domains raises questions regarding inclusivity, particularly in a sector that purports to celebrate creative diversity. The prevailing prioritization of export ready, commodifiable outputs tends to marginalize forms of creativity that are experiential, community rooted, and less immediately profitable (Dewi & Santoso, 2023).

Key indicators of this underrepresentation include limited access to funding, insufficient platforms for exposure, and a general lack of archival or documentation mechanisms for artistic heritage (Rosyadi et al., 2021). In many cases, music and visual arts communities operate outside of the formal creative economy framework, further limiting their capacity to benefit from state sponsored programs. Although GDP statistics portray an upward trend in the creative economy's overall performance, sectoral disaggregation reveals stark disparities (Gasparin & Quinn, 2020; Richards, 2018).

Internationally, various countries have developed inclusive creative economy frameworks that offer valuable lessons. Australia's bottom up model promotes regional inclusivity and artist centered funding mechanisms (Richards, 2018). The European Union fosters inter cultural dialogue and provides cohesive infrastructure for creative collaboration across member states (Boğa & TOPCU, 2020). These examples highlight the potential of structured, equitable strategies in ensuring balanced sectoral growth.

This article investigates the policy and implementation gaps that hinder equitable development within Indonesia's creative economy. It emphasizes the need for operational tools such as valuation guidelines for intellectual property, decentralized funding distribution, and simplified access mechanisms to ensure the inclusion of music and visual arts. By exploring both national challenges and global exemplars, this study contributes to the discourse on creative policy design in emerging economies, aiming to inform a more inclusive trajectory for the post 2025 Indonesian Creative Economy Masterplan.

METHOD

This study employs a qualitative policy analysis framework tailored to the complexity and contextual nuance of Indonesia's creative economy, with a particular focus on the underrepresentation of music and visual arts sectors. The methodological approach is grounded in participatory governance theory and employs a systematic, triangulated data strategy to ensure comprehensiveness and credibility.

The research adopts an interpretivist paradigm utilizing qualitative policy analysis, with secondary data as the primary source of evidence. This is complemented by the triangulation of official reports, academic literature, and policy documents to ensure data reliability and contextual validity (Rykkja et al., 2020). Given the cultural specificity of the sectors under review, an emphasis is placed on the use of participatory and ethnographic frameworks in analyzing policy design and implementation (Rimbawan & Putra, 2025).

Secondary data was obtained from key legal instruments UU 24/2019 on Creative Economy, Perpres 142/2018 (*Rencana Induk Ekonomi Kreatif*), PP 24/2022 on Intellectual Property based Financing as well as statistical reports such as LMKN's royalty distribution data (2022–2024), GDP contribution estimates from the Ministry of Tourism and Creative Economy, and funding scheme data from Dana Indonesiana and Banper Ekraf.

The validity of secondary data was established through a critical assessment of source credibility, consistency across datasets, and triangulation with peer reviewed academic literature and reputable institutional publications (Ahn & Jeong, 2024; Wibowo et al., 2023). Each data source was scrutinized to ensure its relevance and methodological rigor. Where applicable, mixed method elements such as correlating funding allocations with regional economic indicators were used to complement the qualitative analysis.

Thematic analysis was employed to identify patterns and recurring issues in the implementation of creative economy policies. These themes include regulatory bottlenecks, funding distribution inequalities, and valuation challenges for IP backed credit mechanisms. Analytical emphasis was placed on how national policies translate or fail to translate into practice at regional and sectoral levels (Handraini & Frinaldi, 2024).

To explore regional disparities in access to government cultural funding, the study incorporated insights from survey based evaluations, case studies, and the analysis of funding agency reports. Survey tools though not directly administered in this study are referenced as validated instruments in the literature for evaluating accessibility, application success rates, and funding bottlenecks at the local level. Case study references provided further depth on barriers and enablers specific to music and arts communities outside metropolitan areas (Wearring et al., 2021).

The research is bounded by the availability and granularity of secondary data, especially in disaggregated form for music and visual arts. While official data sets offer national trends, they often lack the detail required to capture nuanced sectoral differences. Nonetheless, the use of multiple data sources and comparative evaluation enhances the robustness of findings and supports evidence based recommendations.

RESULT AND DISCUSSION

Legal Frameworks

The implementation of UU 24/2019 has yielded varied outcomes. While some subsectors benefit, others such as performing arts and visual arts lag behind. The lack of clear SOPs and IP valuation mechanisms makes IP-based credit difficult to apply, limiting its practical benefit for creative entrepreneurs. Banks remain reluctant to extend financing based on IP due to inconsistent metrics and risks in collateral realization (Kurniawati & Lestari, 2020). Regionally, the application of these legal instruments is inconsistent, as progressive provinces support creative entrepreneurship more aggressively than others (Adhiatma et al., 2022; Suwannarat, 2021).

Table 1. Implementation of Legal Frameworks Across Subsectors

Subsector	Benefit from UU 24/2019	SOP Implementation (PP 24/2022)	Access to IP Based Credit
Fashion	High	Partial	Low
Culinary	High	Partial	Low
Performing Arts	Moderate	Low	Very Low
Visual Arts/Crafts	Moderate	Low	Very Low

Funding and Infrastructure

Dana Indonesiana and Banper Ekraf mainly benefit urban centers such as Jakarta and Bali. In contrast, rural artists face barriers including lack of information, bureaucratic hurdles, and weak institutional support. This urban bias reduces trust and participation among rural creative communities.

Table 2. Program Reach and Barriers by Region

Program	Urban Reach	Rural Reach	Main Barriers
Dana Indonesiana	High	Low	Info asymmetry, lack of support units
Banper Ekraf	Moderate	Low	Grant complexity, bureaucratic bias
IP Based Credit	Low	Very Low	Lack of valuation standards, risk aversion

Royalty Monetization

Although LMKN has improved royalty collection reaching Rp54.2 billion in 2024 transparency remains a key issue. An estimated 40% of royalties remain unclaimed annually due to poor communication and lack of artist education on entitlements (Herliana et al., 2023; Rizkina et al., 2023). Payment delays and opaque calculation methods undermine trust in the system (Soares & Silva, 2022; Sulaiman et al., 2020). Technical reforms, including digital platforms and regulatory enhancements, have been proposed to improve system efficiency (Rizkina et al., 2023). Small enterprises, including music venues and indie labels, face difficulty complying with complex royalty structures, leading to calls for simplified and tailored guidelines (Madelan, 2020).

Table 3. Royalty Trends and Distribution Effectiveness

Year	Royalty Collected (Rp Billion)	Royalty Distributed	Estimated Unclaimed (%)
2022		27.8	
2023		40.8	
2024	77.15	54.2	~40%

Export Bias and Data Gaps

Indonesia's creative export performance is assessed through official trade data and sectoral reports (Ermawati & Lestari, 2022). However, these datasets underrepresent music and fine arts, primarily due to classification issues. Intangible goods are difficult to categorize, often leading to their exclusion from formal export metrics (Fahrizal et al., 2022). Bureaucratic barriers such as customs regulation and weak IP enforcement further limit creative export flows (Madelan, 2020). Meanwhile, government incentives for digital export, including tax relief and digital platform training, are concentrated in urban areas, often missing rural creatives due to infrastructure and digital literacy gaps (Aswad et al., 2023; Tarmizi et al., 2025).

Table 4. Export and Digital Incentive Accessibility

Factor	Urban Areas	Rural Areas	Notes
Export Readiness	High	Low	Regulatory familiarity, supply chain access
Access to Trade Data Tools	Moderate–High	Low	Literacy gaps
Digital Export Incentives	Moderate	Low	Infrastructure & outreach limitations

The implementation of Indonesia's creative economy policies particularly those intended to support music and visual arts reveals critical misalignments between regulatory ambitions and institutional capacities. One major source of this disconnect lies in the divergence between national level policy frameworks and local government execution. Although UU 24/2019 formalizes the creative economy's strategic importance, many local governments lack the capacity, technical knowledge, or resources to effectively translate this mandate into viable regional programs (Firmansyah et al., 2024). As a result, policy uptake varies drastically across regions, with urban areas advancing more rapidly than rural ones, creating uneven development trajectories and compounding cultural disparities.

This institutional fragmentation is compounded by bureaucratic inertia. Government agencies are often slow to adapt to the fluid dynamics of the creative economy, where innovation cycles outpace traditional policy response timelines (Kuoppamäki & Vilmilä, 2023). Particularly within the arts sector, delays in policy rollouts and limited engagement with grassroots stakeholders foster a disconnect between regulation and practice (Symons, 2016). Artists, musicians, and small creative enterprises frequently remain marginalized in formal policymaking processes, despite being the core constituents of the ecosystem. This lack of participatory governance reduces the relevance and resonance of policies, weakening their long term sustainability and effectiveness.

In tandem, the operationalization of IP based credit remains constrained. Without standardized methods for valuing intellectual property whether through income, market, or cost based approaches financial institutions are reluctant to issue loans secured by creative assets (Firmansyah et al., 2024). The absence of digital infrastructure to support IP registration and valuation further exacerbates these challenges. Creators, particularly in the music sector, struggle to leverage their work for financing due to institutional unfamiliarity with creative valuation protocols (Liao et al., 2025). A lack of financial literacy among creators and the absence of dedicated intermediary institutions to assist in IP documentation further contribute to the gap between creative output and financial inclusion.

Regional governments have a pivotal role to play in closing this gap. As implementers of national strategies, their localized knowledge and direct contact with creative communities position them uniquely to facilitate more inclusive development. However, current funding mechanisms like Dana Indonesiana or Banper Ekraf lack tailored approaches for rural and underrepresented regions, undermining the potential for localized cultural economies (Ülger, 2018). Moreover, local governments often fail to adequately coordinate with educational and cultural institutions, impeding holistic ecosystem development. In many cases, administrative inefficiencies and limited inter agency cooperation hinder the formation of collaborative platforms necessary to support emerging creative talent.

The monetization of royalties through LMKN illustrates broader structural inefficiencies. While collections have increased, up to 40% of royalties remain unclaimed annually, largely due to limited outreach, a lack of transparency, and minimal digital engagement (Rizkina et al., 2023). For small venues and businesses, compliance remains a burdensome and complex process. Reform proposals include simplifying registration, streamlining tariffs, and building capacity among rightsholders and collectors alike (Herliana et al., 2023; Xiao & Deng, 2023). Additionally, creating more user friendly systems and adopting blockchain based royalty tracking could enhance transparency, reduce disputes, and ensure that royalties reach creators in a timely and accurate manner.

Another under addressed issue is the export marginalization of music and arts. The absence of precise trade classifications for intangible creative goods means that these sectors are systematically underrepresented in economic data and consequently overlooked in export promotion initiatives (Yanti, 2025). Bureaucratic hurdles and weak digital infrastructure further limit global market penetration, especially for rural based creators (Vo et al., 2023). Government incentives often prioritize urban businesses, excluding those most in need of support. Furthermore, the lack of curated international exposure programs for music and visual arts reduces the global competitiveness of these sectors. Without strategic investment in branding, licensing, and cross border cultural collaborations, Indonesian creative products risk remaining niche and undervalued on the world stage.

To address these persistent challenges, a renewed Creative Economy Masterplan for 2026–2035 must embed metrics beyond GDP. Alongside financial indicators like export revenue and IP backed credit uptake, the plan should include metrics on community participation, cultural access, collaborative networks, and digital engagement (Symons, 2016; Liao et al., 2025). These broader indicators can help policymakers monitor both economic and social impact, while also enabling adaptive governance models responsive to sectoral trends. The integration of real time monitoring tools and periodic evaluations would further strengthen the plan's capacity to evolve with the sector's changing needs.

Indonesia's creative sectors, especially music and visual arts, need integration into a responsive ecosystem. This requires institutional coordination, training, grassroots consultation, and data-driven planning to ensure inclusivity and sustainability.

CONCLUSION

Indonesia's creative economy is increasingly central to national development but continues to face structural challenges in achieving inclusivity, especially for music and visual arts. Despite a strong legal framework through UU 24/2019 and related regulations, implementation remains uneven. Fashion, culinary, and crafts dominate growth, while music and visual arts still struggle with limited financing access, unclear intellectual property valuation mechanisms, weak regional infrastructure, and opaque royalty governance.

To move forward, the upcoming Creative Economy Masterplan (2026–2035) should prioritize inclusive and measurable reforms. This includes expanding metrics beyond GDP to capture cultural participation, regional access, and digital engagement, while streamlining IP-based financing, improving transparency in royalty systems, and strengthening rural outreach. By linking policy design with practical implementation, Indonesia can build a more equitable creative economy that not only drives diversification but also reinforces cultural resilience and global competitiveness.

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