INDONESIA'S CULTURAL ECONOMY: AN ECONOMIC GEOGRAPHY USING TWO SECONDARY DATA SOURCES

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ABSTRACT

Economic geographers have become increasingly interested in the importance of the 'cultural economy' to cities and regions, but rarely have results been sought or discussed for Southeast Asia or nations in the developing world. This article responds to this lacuna by charting an economic geography of cultural production in Indonesia, examining two sources of publicly available data: the United Nations Statistics Division's COMTRADE database of trade statistics, and DISb2b Indonesia (a commercial database of business location details in Indonesia). Results are discussed for the period 1996-2002, for which reliable data are available. While both sources are limited (and such limitations are discussed here), they provide enough insight for some conclusions about the character of Indonesia's cultural economy to emerge. In contrast to studies of cultural economy in overseas contexts, Indonesia's culture-related exports are dominated by emphasis on hardware and manufacturing output, rather than intellectual property or 'symbolic' content. In keeping with overseas examples though, the geography of Indonesia's cultural economy displays high levels of metropolitan primacy. Results suggest that theories of cultural economies must be re-shaped to include consideration of regional and international flows, in addition to locally-unique class, cultural and economic dynamics in particular cities and regions.

Keyword: Indonesian Culture Economy, Cultural Commodities, COMTRADE Database

INTRODUCTION

Defining the 'cultural economy'

Economic geographers have become increasingly interesting in theorizing and measuring the size and impact of the 'cultural economy' in cities, regions and nations. Though there is some difference in interpretation of the term 'cultural economy' (compare for example, Appadurai 1990; Scott 2000; Kneafsey 2001 and du Gay and Pryke 2002), in its simplest form cultural economy refers to activities of production, circulation and consumption linked to creativity and image-production. This includes the design, production and distribution of commodities where cultural expressions are central – what have become known collectively as the creative industries (such as music, film, literature, TV, book publishing, art, design and architecture). It also includes cultural events (including festivals, exhibitions, sporting competitions and creative performances) and specialist support services for the arts and creative industries. Recent studies have shown that the cultural economy of cities and regions in Western nations can be substantial (Scott 2000; Howkins 2001; Gibson, Murphy and Freestone 2002), notwithstanding limited data sources and problems with measurement (Throsby 2001; Karttunen 2001). In Australia, for instance, the cultural economy is worth in the order of A$25 billion per annum, a figure comparable to the output of the residential construction and road transport sectors (Gibson, Murphy and Freestone 2002), with exports of cultural goods totalling over A$820 million per annum. Although only 180,000 people registered a cultural occupation as their main form of income in the national census, more than 2.5 million Australians were involved in some form of paid or unpaid work in cultural production (equivalent to about 13 percent of the national population). It has been argued that the cultural economy is a key new growth sector (Florida 2002), especially given its links to the tourism and information technology sectors. The cultural economy is also connected to property market dynamics, particularly in large cities, where the clustering of cultural production and performances in entertainment or 'lifestyle' districts can contribute to greater demand for residential and commercial space, subsequent rising rents and social displacement of the poor and elderly (Zukin 1995). It plays a role in the gentrification process, and is thus deeply embedded in the demographic and political transformations of places. This combination of related economic and socio-cultural factors sits behind much of the interest in the concept of cultural economy in contemporary capitalist society.

Indonesia's cultural economy – background and rationale

Like much social science writing (see Yeung 2001 for elaboration), most, if not all of the work on cultural economy has emerged from North America and Europe, and especially from cities in the West generally considered at the core of creative sectors like film production, music and television (Pratt 1997; Scott 1999; 2000). Only recently have researchers begun the task of understanding the cultural economy in Asia (see Chua 2000; Kim 2001; Sasaki 2001; Aoyama and Izushi 2002; Kim and Yoo 2002). As yet, no research has attempted to theorise or quantify cultural economy in Indonesia. This gap is problematic for three reasons:

First, if the cultural economy is indeed an important new sector in the global economy, then its dimensions and impacts in Indonesia (and Indonesia's place in the global cultural economy) should be better understood in order to inform national and regional economic development policy-making. In other parts of Asia, some progress has been made towards thinking through the policy issues that stem from the recognition of the role of cultural economy, including the presence of overtly 'economic' considerations in a field previously more focused on constructing national identities, supporting 'flagship' institutions such as major museums, galleries and performance groups (Kong 2000); in some cases, full-blown cultural economy strategies have been developed, particularly in countries such as Hong Kong where cultural production has already had a major impact, and is a recognized growth area (Hong Kong Trade and Development Council 2002). By contrast, little is known about the cultural economy in Indonesia, and to our knowledge no prior research has been undertaken – a clear research and policy gap.

Second, it remains important to determine the significance of the cultural economy in countries beyond the (post)industrial West, especially in developing countries such as Indonesia that are not normally thought of as major providers to global cultural flows, and where English is not the main language. Although many parallels may exist between cultural production in Asia and in North America and Europe, local conditions mean that in Indonesia the cultural economy is likely to take a quite different form.

Theories of cultural economy have largely emerged from rich, Western nations, where cultural production and consumption have been closely linked to dual processes of economic restructuring (evident in the decline in manufacturing and the shift to higher-order services) and the rise in middle-class disposable incomes, allowing greater capacity for personal and household spending on items and experiences previously considered 'luxury' and out of reach of the ordinary citizen. Economic restructuring has had very different impacts in Asia (where many countries have benefited from the outsourcing of production from the West), though there are considerable parallels in the shift to 'leisure' economies and a general rise in rates of consumption. Much has been written about the so-called 'rise of the Asian middle-class' and the 'new rich in Asia' (Rowher 1995; Robison and Goodman 1996), including Indonesia (Tanter and Young 1990; Gerke 2000), as industrialisation and diversification of domestic economies has occurred. What is clear is that the phenomenon of an expanding middle-class and subsequent boom in demand for the products consumer goods industries were key features of Indonesian social change in the 1980s and early 1990s, as in other parts of Asia. But consumption has been curtailed since the 1997 Asian financial crisis, which, in combination with subsequent political unrest, hit Indonesia particularly hard in comparison with other Asian nations (Gerke 2000). Despite subsequent austerity, consumer lifestyles have remained an important means through which status is accumulated in contemporary Indonesian society, even among those for whom it is now much harder to support the sorts of conspicuous consumption characterizing the middle-class. As Gerke (2000: 137, 146) observed, *consumerism as a lifestyle under conditions of economic underdevelopment, as in Indonesia, took a different course than consumerism in developed economies... In Indonesia, it seemed, nearly everyone wanted to take part in 'modern' life. The socially palpable pressure to re-establish, constantly, middle-class membership led inevitably to demonstrative consumption... However, even before the 1997 crisis, only a small portion of the Indonesian new middle class was able to afford a Western or urbanised lifestyle. As their consumption possibilities were limited, consumption assumed a symbolic dimension.*

For many, such symbolic consumption involved sharing of brand name clothing among friends, publicly observable consumption at McDonalds and other western-style food outlets (buying small meals and staying for long periods), and higher usage of private, and cheaper forms of consumption: televisions and video disc players (rather than, as elsewhere, cinema-going, or buying digital TVs and DVDs). Shopping mall culture also played a part in symbolic consumption – spending time in undercover centres, but not necessarily purchasing many items.

All these activities stem from economic activities that are normally defined as part of the cultural economy. Yet, while academics have gone some way to understanding class dimensions of new consumption and lifestyles in Indonesia, what is not clear is how this shapes patterns of production and flows of actual goods and services concerned. These social trends might suggest that actual production is relatively small, because of the symbolic nature of consumption (hanging out in malls rather than buying goods, or sharing resources rather than individually replicating purchases), despite the increasing importance of cultural consumption in the regulation of social identities in everyday lives. The analysis undertaken here aims to shed some light on whether this is indeed the case.

A third reason to highlight the importance of examining Indonesia's cultural economy: further insights may be gained on how the global cultural economy is organized by examining the cultural economy in Indonesia. Previous accounts of cultural economies have tended to focus particularly on those stages of commodity production where creativity is most important: film writing and post-production, musical performance and recording, and various forms of visual and industrial design. Of course, though, behind these stages of the production process for cultural commodities are networks of linkages with other places and stages of production. While fashion clothing may be designed in New York, Hong Kong or Paris, the actual assembly of those clothing items may often take place elsewhere, in low labour-cost locations or where raw materials are more easily sought. Similarly Compact Disc, VCD, DVD and CDROM manufacturing may take place in different countries to those where the actual music was recorded, films shot or software developed, not to mention the hardware such as recording equipment, speakers, cameras and other machinery required to (re)produce cultural commodities. Much of the emphasis in cultural economy, however, has been on how local clustering and agglomeration shapes the specific industry/place nexus in the West (eg Crewe and Forster 1993; Bassett et al 2002). In response to this, though, as Coe and Johns (2004) and Leslie and Reimer (1999) have both argued, geographies of cultural economies extend beyond the local; commodity chains necessarily function in and across space, and are themselves constituted through spatial relations. The cultural economy is likely vary enormously for commodities as they are produced, distributed and consumed across different places.

Indonesia has its own domestic cultural economies of design, film, music and so on. Every country is likely to have a certain level of infrastructures of cultural production simply to satisfy local demand. In the case of Indonesia, given its large population, this alone is likely to be significant. But, there is also a great deal of difference between domestic cultural production and export-orientated manufacturing on behalf of overseas corporations in the creative sectors. Both are part of the cultural economy, and need to be considered as part of a national-scale survey of this type. One hypothesis is that Indonesia's cultural economy is situated in a somewhat contradictory way in the global cultural economy: the rise of the middle class and aspirations for consumption of global cultural goods on the one hand, and its role as a producer of mass-produced goods for the global cultural economy on the other (but without the benefits of the royalties from design/intellectual property inputs, which take place elsewhere). In this way, understanding Indonesia's cultural economy might lead to improvements in our theories of cultural economy more generally (in parallel to what Yeung 2003 identifies as the contributions Asian scholars can make to global knowledges in economic geography), such that they move beyond place-specific studies to examine how countries are positioned in different kinds of inter-scalar commodity chains for cultural products.

Hence, here we begin the process of mapping Indonesia's cultural economy, as part of a wider collaborative project on the cultural economy in Asia (Gibson and Kong forthcoming). It is essentially a pilot study that draws on two easily available data sources: the COMTRADE database of trade statistics available through the United Nations Statistics Division (see United Nations 2004), and DISb2b Indonesia, a commercially available database of Indonesian firms (DISb2b 2004), that enable selected data to be extracted: the number of firms in different creative sectors, their geographical distribution, and the total export value of Indonesian cultural-related production (as well as imports of creative products). The United Nations data source is especially useful in determining the extent to which Indonesia's cultural economy is embedded in global flows of cultural production, through for instance estimations of Indonesia's contribution to exports of manufactured CDs and DVDs. Use of publicly-available data sources is an appropriate first-step towards a more comprehensive survey of the cultural economy in Indonesia, which would require analysis of custom-extracted employment data and detailed interviews with major cultural producers. While both data sources used here have limitations (discussed below), their public status enables others to quickly and easily replicate this methodology in future years, in order to monitor the growth or decline in cultural economy across different sectors. Further work is certainly needed for better understandings of the labour market impacts of growth in the cultural economy, and to move beyond the limitations of the data sources discussed here.

DATA SOURCES AND METHOD

The aim of this article is to chart a simple economic geography of Indonesia's cultural economy. The approach is to adopt a fairly accepted, standard definition of cultural economy, extract data from the two available sources, and interpret results in relation to existing understandings of both the specificities of creative sectors (e.g. Throsby 2001) and the geography of cultural production (Gibson et al 2002). Results can then be compared with other places where studies have been conducted (e.g. Australia) to determine the character of Indonesia's cultural economy.

While there is much debate about meanings and definitions of the cultural economy (see Gibson and Kong forthcoming), in this article we take a fairly accepted definition as the starting point of analysis. Generally, the cultural economy refers to forms of production that rely on symbolic content and/or creativity at a fundamental level (Pratt 1997; Scott 2000). Certain industries, such as film, music, design, publishing, television production and broadcasting, writing and visual arts, spring to mind as obvious inclusions. Other industries are also listed that may be less obvious, such as architectural services, museums, libraries and advertising. Also included in our analysis of COMTRADE statistics are data pertaining to physical commodities of the creative sectors (or which support the creative sectors) that are not otherwise covered by the above sector categories. The main commodities in this group are electronic goods, media and recording products, recording and broadcast machinery and manufacturing of other 'cultural' goods such as toys and sporting equipment.

The two data sources used are asynchronous, and thus, some detail and discussion of the limitations of each is required.

First, the commercially available (and inexpensive) business database DISb2b was used primarily to examine data on the number of firms in the creative sectors in Indonesia, and their geographical location within Indonesia for the single year 2002. The DIS b2b database classifies listed companies according to both industry (KLUI code) and commodity (Harmonised System) categories. The Harmonized System (HS - or officially the Harmonized Commodity Description and Coding System) was adopted by the Customs Co-operation Council in June 1983, and the International Convention on the Harmonized System (HS Convention) entered into force on 1 January 1988 (HS88). In accordance with the preamble to the HS Convention, which recognized the importance of ensuring that HS be kept up to date in the light of changes in technology or in patterns of international trade, HS is regularly reviewed and revised. Most countries use HS for the collection, compilation and dissemination of international merchandise trade statistics. KLUI is by contrast the standard industry categorization system in Indonesia. Combined, these two classification systems enable a good majority of what is generally considered part of the cultural economy – listed above – to be traced via company listings.

For the purpose of extracting information about the number and location of companies involved in cultural industries in Indonesia, companies have been grouped according to Industry type (KLUI) where possible. This is in an attempt to avoid counting a single business twice, as often occurs when classifying according the commodity type (simply because businesses may produce more than one kind of commodity). Where the KLUI Industry classification code does not cover a certain area in detail, for instance in manufacturing, sale and service of musical instruments or artwork, the HS commodity code has been used. Where possible, the double listings have been identified and excluded. One final limitation of the DISb2b database was that firm inclusion in the database is self-initiated by companies, rather than comprehensively collated by a third party. The database includes only those firms who are aware of the database in the first place; and it probably favours those who are large enough to warrant listing, at the expense of smaller firms, particularly in the informal sector. However, data discussed below indicate that a significant number of firms across the creative sectors are listed (more than 7000), enough at least to be able to make further observations about the sectoral and geographical distribution of the cultural economy in Indonesia.

Second, the United Nations Statistics Division database of commodity trade, COMTRADE, was used to examine export and import of cultural products to and from Indonesia. This also uses the HS classifications for commodity traffic, thus links are possible with the business location database discussed in this article. A major advantage of the COMTRADE database is its global nature, and capacity for multiple extractions at different scales. For instance, it was possible to examine both global export and import of creative commodities to and from Indonesia, and determine trade of individual or groups of commodities between Indonesia and specified individual countries. One major limitation of this database is that, for obvious reasons, it only includes physical commodities rather than intangible services or royalties. The latter is an important omission in terms of this study, because much of the profit made in the cultural economy stems from sale or licensing of the intellectual property rights that preside over creative goods (Lury 1993; Pratt 2000). These rights might take the form of physical commodities when sold as compact discs or DVDs, but do not figure in COMTRADE statistics when an export constitutes airplay of a song or broadcast rights for a television show in another market. Such earnings are not listed here, and subsequent interpretation of these results must heed this absence.

Ideally, these two sources would be accompanied by statistics on employment generated in the cultural economy in Indonesia (see Pratt 1997 and Gibson et al 2002 for comparative approaches), yet such data were at the time of writing not available. BPS Statistics Indonesia, Indonesia's government statistics bureau, do not produce detailed employment data cross-tabulated for individual creative sectors, making such analysis impossible using census and industry surveys. Even more of factor, though, are limitations relating to census-based employment data *per se*, which present even greater barriers to analysis of the employment impacts of the cultural economy in Indonesia. As has been discussed elsewhere (Karttunen 2001; Menger 2001; Throsby 2001; Gibson et al 2002), census methods of estimating employment in the creative sectors are highly problematic, largely because income-earning activities in these sectors are often very informal in nature. Musicians, writers, actors, and artists simply may not reveal in official surveys how much income they earn from their efforts. That this is so is likely to be magnified in Indonesia, where an even greater proportion of creative production is likely to be informal (a simple reflection of the larger informal sector in Indonesia when compared with western nations). For these reasons, only international trade and firm-related data are discussed in this pilot study.

RESULTS ON FIRMS IN INDONESIA'S CULTURAL ECONOMY

The DIDb2b database contained just over 7000 companies in the creative or cultural economy in Indonesia. This is certain to be an underestimation of the total number of companies in the cultural economy, for reasons outlined above, yet it does provide enough of a sample of creative-orientated businesses for distributions to be measured and observations made. Of the 7016 firms registered from the creative industries, dominant sectors were printing and publishing (1298 firms; 18.5%), retail trade in electrical goods (1106 firms; 15.8%), building, architectural and technical services (1003 firms; 14.3 %) and private recreational, cultural and sporting services (634 firms; 9%; see Table 1). Two of these – private recreational, cultural and sporting services and printing publishing – would be considered 'core' activities in the cultural economy, and thus would be expected to figure prominently in results. Retail trade in electrical goods and building, architectural and technical services, though related to the cultural economy (as places that, in turn, sell the products of cultural production, and provide services to the architectural profession, which is normally included in definitions of cultural economy) would not in other frameworks be considered crucial to interpretation. Other sectors with substantial numbers of companies include advertising and marketing research services, engravings/prints/lithograph firms, and import trade across electronic, communications, paper products and printing and publishing industries. Certain sectors, such as recorded media, and visual arts have lower than expected results. This potentially illustrates the weakness in the representativeness of the data source – or it could simply mean that the Indonesian economy is less capable of supporting large numbers of firms in these activities, in comparison with other nations.

International trade statistics, discussed in more depth below, provide more insight into the quantity of output of actual sectors in Indonesia's cultural economy, and thus help to resolve this interpretation, though they do not shed light on domestic production for domestic markets.

Of more interest than the raw numbers of firms from this data source are results of the 7000 companies broken down by province. These figures, spread across all sectors, provide a clear picture of the geographical distribution of Indonesia's cultural economy (see Table 2). 4760 listed firms were located in Jakarta, comprising a hefty 68 percent of all firms listed. In raw terms, other Javanese provinces also featured substantial numbers of listed firms (and within these provinces firms were almost exclusively located in large cities such as Surabaya and Bandung), but at a much lower percentage of the total (between 8.4 percent for East Java and 2.8 percent for Yogyakarta). Table 1 also compares data on numbers of firms against the proportion of Indonesia's total population in each province, calculated through a primacy index. This is effectively a ratio of the percentage of the total of Indonesia's cultural economy firms in a given province compared to that province's share of Indonesia's total population. A result less than one means that the province is under-represented in terms of cultural economy firms, any result over 1 indicates the level of primacy, or concentration of firms in that province. Results overwhelmingly demonstrate that Indonesia's cultural economy is one shaped by metropolitan primacy. Jarkarta, with 68% of all cultural firms, but only 4 percent of the country's population, is undoubtedly (and expectedly) the focal point for creative industries in Indonesia. Across most sectors Jakarta dominated, in particular television and film production, radio and television broadcasting, printing and publishing, architectural services, recreational and cultural services. The only other province to return a positive result on the primacy index was Yogyakarta, reflecting that city's long-held reputation as a cultural centre for the arts and tourism.

Data on firm type and location provided one sketch of the internal geography of the cultural economy in Indonesia. More detailed work is clearly needed to develop and confirm the observations made there about sectoral and geographical distribution. In the West, cultural firms have tended to agglomerate in cities as well. Reasons often given for this are: access to telecommunications facilities, diversified and highly skilled labour forces, and support services (technical, legal, marketing etc), benefits gained from proximity to other cultural producers, and lifestyle factors associated with the more 'cosmopolitan' precincts and offerings that big cities are able to provide. This is most probably also the case in Indonesia, exacerbated by Jakarta's dominance as primate city in population terms, and its status as the seat of government (hence access to government officials, policy makers etc). Further work should confirm the extent to which these factors are present, and which are most important in the Indonesian context. Other kinds of data, such as trade in commodities, provide a different perspective: a means of interpreting the international position of Indonesia's cultural economy.

Table 1. Numbers of firms in cultural economy sectors, Indonesia 2002

KLUI (or HS) Code	Industry or commodity type	Number of firms	Percent of total
342	Printing and publishing	1298	18.5
62422	Retail trade in electrical goods	1106	15.8
8294	Building, architectural and technical services	1003	14.3
962	Private recreational, cultural and sporting services	634	9.0
8293	Advertising and market research services	526	7.5
6246	Retail trade in paper, paper products, writing materials, sporting goods, musical instruments and photographic tools	468	6.7
61238	Import trade in electronic, electrical, communication, photographic and optical equipment	302	4.3
61233	Import trade in paper, products manufactured from paper, stationary and products of printing and publishing	271	3.9
HS-9702	Original engravings, prints and lithographs	228	3.2
61338	Domestic wholesale trade in electronic, electrical, communication, photographic and optical equipment	201	2.9
6248	Retail trade handicrafts, children's toys and paintings	159	2.3
HS-9704	Postage and revenue stamps, first day covers, etc (used or collections)	125	1.8
61333	Domestic wholesale trade in paper, products manufactured from paper, stationary and products of printing and publishing	89	1.3
HS-37	Photographic and Cinematographic goods	89	1.3
HS-9006	Photographic (other than cinematographic) cameras and equipment	88	1.3
HS-92	Musical Instrument Manufacturing	86	1.2
HS-9701	Paintings, drawings, pastels, collages etc, hand made	84	1.2
HS-9706	Antiques older than one hundred years	65	0.9
HS-9703	Original sculptures and statuary, in any material	64	0.9
61133	Export trade in paper, products manufactured from paper, stationary and products of printing and publishing	43	0.6
61138	Export trade in electronic, electrical, communication, photographic and optical equipment	26	0.4
961	Government recreational and cultural activities	16	0.2
HS-8524	Recorded media	16	0.2
HS-9007	Cinematographic cameras and projectors	13	0.2
HS-9705	Collections and collectors pieces	11	0.2
6256	Retail trade in antiques	5	0.1
TOTAL		7016	100.0

Source: DISb2b 2002

Table 2. Geographical distribution of all firms in the cultural economy, Indonesia, 2002, by province

Province	Number of businesses*	Percent of total	Population**	Percent of population	Primacy index
DKI Jakarta	4760	67.8	8,389,443	4.1	16.7
Jawa Timur	589	8.4	34,783,640	16.9	0.5
Jawa Barat	476	6.8	35,729,537	17.3	0.4
Jawa Tengah	443	6.3	31,228,940	15.1	0.4
DI Yogyakarta	197	2.8	3,122,268	1.5	1.9
Sumatera Utara	172	2.5	11,649,655	5.6	0.4
Banten	97	1.4	8,098,780	3.9	0.4
Bali	71	1.0	3,151,162	1.5	0.7
Riau	34	0.5	4,957,627	2.4	0.2
Sumatera Barat	34	0.5	4,248,931	2.1	0.2
Sulawesi Selatan	32	0.5	8,059,627	3.9	0.1
Sumatera Selatan	20	0.3	6,899,675	3.3	0.1
Irian Jaya	13	0.2	2,220,934	1.1	0.2
Kalimantan Barat	10	0.1	4,034,198	2.0	0.1
Lampung	9	0.1	6,741,439	3.3	0.0
Nusa Tenggara Timur	9	0.1	3,952,279	1.9	0.1
Sulawesi Utara	9	0.1	2,012,098	1.0	0.1
Kalimantan Selatan	8	0.1	2,985,240	1.4	0.1
Kalimantan Timur	8	0.1	2,455,120	1.2	0.1
DI Aceh	7	0.1	3,930,905	1.9	0.1
Maluku	3	0.0	1,205,539	0.6	0.1
Nusa Tenggara Barat	3	0.0	4,009,261	1.9	0.0
Sulawesi Tengah	3	0.0	2,218,435	1.1	0.0
Bengkulu	2	0.0	1,567,432	0.8	0.0
Gorontalo	1	0.0	835,044	0.4	0.0
Jambi	1	0.0	2,413,846	1.2	0.0
Kalimantan Tengah	1	0.0	1,857,000	0.9	0.0
Maluku Utara	1	0.0	785,059	0.4	0.0
Sulawesi Tenggara	1	0.0	1,821,284	0.9	0.0
Kep. Bangka Belitung	0	0.0	900,197	0.4	0.0
Total	7016	100	206,264,595	100.0	1

*Source: * DISb2b 2002; ** BPS 2000*

Table 3. Export of cultural products, Indonesia, 1996-2002 (US$'000)

HS Code	Commodity description	1996	1997	1998	1999	2000	2001	2002	Total
8521	Video recording and reproducing apparatus	$622,280	$636,879	$358,743	$284,546	$639,122	$644,871	$1,177,614	$4,364,054
8527	Radio, radio-telephony receivers	$460,965	$255,186	$215,559	$210,109	$612,513	$655,912	$572,987	$2,983,230
8529	Parts for radio, tv transmission, receive equipment	$231,252	$173,839	$201,632	$297,739	$475,156	$411,164	$398,867	$2,189,649
8522	Parts, accessories of audio, video recording equipment	$74,217	$64,723	$48,389	$165,059	$610,496	$649,898	$385,651	$1,998,432
95	Toys, games, sports requisites	$404,730	$129,446	$104,266	$220,262	$381,906	$197,967	$168,770	$1,607,348
8518	Audio-electronic equipment, except recording devices	$146,314	$172,591	$121,219	$151,412	$306,212	$273,301	$220,741	$1,391,769
8528	Television receivers, video monitors, projectors	$45,148	$64,879	$43,966	$38,104	$314,533	$348,436	$298,884	$1,153,950
92	Musical instruments, parts and accessories	$108,181	$53,542	$62,516	$83,669	$178,224	$206,197	$237,847	$930,176
8519	Electronic sound reproducing equipment, non-recording	$143,730	$98,148	$104,146	$138,506	$160,154	$101,040	$37,137	$782,861
8525	Radio and TV transmitters, television cameras	$51,474	$19,402	$5,138	$4,211	$16,391	$86,144	$158,021	$340,780
8523	Prepared unrecorded sound recording media	$32,889	$27,508	$23,165	$45,553	$75,747	$41,029	$26,792	$272,684
8520	Electronic sound recording equipment	$45,697	$68,427	$23,775	$21,959	$19,989	$4,990	$4,842	$189,679
8524	Sound recordings other than photographic equipment	$391	$849	$1,401	$7,952	$26,189	$42,073	$9,596	$88,451
4901	Printed reading books, brochures, leaflets etc	$5,992	$4,505	$3,859	$10,071	$18,711	$9,186	$9,888	$62,212
37	Photographic or cinematographic goods	$2,754	$2,354	$7,630	$6,286	$6,251	$5,372	$5,421	$36,069
97	Works of art, collectors pieces and antiques	$1,275	$3,160	$4,380	$4,770	$3,977	$4,806	$4,262	$26,630
4910	Calenders	$462	$552	$1,655	$4,836	$1,079	$1,369	$1,958	$11,911
4911	Printed catalogues, pictures, Photos	$475	$1,403	$2,033	$1,129	$910	$1,376	$3,500	$10,826
4903	Children's books	$1,893	$1,187	$502	$1,022	$409	$417	$299	$5,729
4902	Newspapers, journals	$134	$250	$106	$3,187	$328	$739	$531	$5,275
4906	Postcards, greeting cards	$169	$42	$71	$2,062	$676	$1,174	$1,059	$5,252
4905	Maps, charts, atlases	$11	$112	$118	$151	$239	$660	$127	$1,418
4904	Music, printed or manuscript	$37	$413	$2	$38	$97	$26	$24	$638
4906	Architect plans	-	-	-	$76	$20	$46	$10	$152
Export Total		$2,380,468	$1,779,399	$1,334,271	$1,702,709	$3,849,328	$3,688,192	$3,724,827	$18,459,195

Source: United Nations (2004):NOTE: totals do not always exactly equal sum of displayed cells due to rounding. Totals represent original, non-rounded results.

Table 4. Trade of cultural commodities, 2002, selected Asia-Pacific countries

RANK OF SELECTED COUNTRIES ACCORDING TO VALUE OF IMPORTED CULTURAL COMMODITIES (2002)			
Rank	Reporter Title	Trade Value (US$)	% of total imports
1	China, Hong Kong SAR	29,804,985,160	14.33
2	Japan	15,266,045,976	4.52
3	China	13,612,990,173	4.61
4	Singapore	8,281,117,128	7.11
5	Rep. of Korea	6,188,360,124	4.07
6	Australia	5,003,440,964	-
7	Malaysia	3,840,558,847	4.84
8	India	2,566,417,646	-*
9	Indonesia**	594,309,016	1.90
10	China, Macao SAR	188,676,633	-
Rank of selected countries according to value of exported cultural commodities (2002)			
Rank	Reporter Title	Trade Value (US$)	% of total exports
1	China	41,913,338,536	12.87
2	China, Hong Kong SAR	32,863,273,520	16.27
3	Japan	32,583,729,740	7.82
4	Rep. of Korea	21,161,935,172	13.03
5	Malaysia	10,382,858,664	11.13
6	Singapore	10,219,191,102	8.16
7	Indonesia	3,726,299,993	6.52
8	Australia	965,780,947	-
9	India	559,282,750	-
10	China, Macao SAR	22,070,030	-

Source: United Nations (2004)

* Some cumulative statistics were not available for some countries.

** For Indonesia, slight variations between export and import figures and those in Tables 3 and 5 are due to rounding.

RESULTS ON INTERNATIONAL TRADE IN CULTURAL COMMODITIES

UN Statistics Division figures for HS classification commodities indicate the commodities that feature in both export-orientated production and imports (see Table 3). These have been organised using HS codes for commodity types; exports of manufactured clothing and footwear, which are related to the cultural economy via fashion design, have not been included because of difficulties of confirming which export production was destined for 'fashion' as opposed to 'non-fashion' markets. Indonesia's position in global trade of clothing and footwear is a major subject in itself, linked to issues of outsourcing of production by transnational 'brand name' firms, and exploitation of low-cost labour (see Connor 2000). Beyond problems with the data, this particular sector deserves separate attention than in this article, thus its exclusion from analysis of trade data here.

For the 24 HS categories for which data were extracted, overall trends reflect a steady increase in export of cultural production, interrupted by the Asian financial crisis and political instability of 1997 and 1998 (with a low of US$1.33 billion in 1998). Exports rose again from 2000 onwards, at levels well above pre-crisis times, and have leveled out at around US$3.8 billion per annum. In large part these considerable increases were due to a small number of specific sectors: video recording and reproducing apparatus, radio receivers, and components for electrical equipment. These figures confirm the earlier hypothesis that Indonesia's export-orientated cultural economy is dominated more by hardware than 'content' related commodities (such as artworks, CDs and books). Other significant segments of the cultural export economy include musical instruments, sound recording media, radio and television transmitters and televisions cameras – again hardware commodities associated with the physical production and reproduction of cultural expressions, rather than commodifications of Indonesian cultural expressions, *per se*. The latter show up in export figures in classifications such as works of art and architectural plans, which are less significant in terms of legitimate export trade.

Table 4 places trade of cultural commodities to and from Indonesia in the context of that of selected other countries in the Asia-Pacific region. Figures reflect expected trends: Indonesia's cultural economy is, in export trade terms, less substantial than those of larger, more industrialized neighbours such as Malaysia and Singapore (though in 2001 its export total was almost identical to that of Thailand, for whom statistics were not available in 2002), and far smaller than larger northern economies of Japan, Hong Kong, China and Korea. In terms of proportion of total imports and exports, Indonesia is near the bottom of the list: cultural commodities make up only 1.9 and 6.5 percent of total imports and exports respectively. Reasons for this possibly link to our earlier discussion of 'symbolic consumption' patterns; hence in the case of imports, the countries with larger proportions of their import total as cultural commodities have larger and more affluent middle classes, and in the case of Singapore and Hong Kong, are made up of consumers with long-held penchants for international cultural expressions (a product of being highly global cities across successive generations). In contrast, Indonesians may simply prefer to consume locally produced cultural commodities, which are now, since the crisis, more affordable. Yet, although its contributions to Euro-American popular culture markets are far smaller than neighbouring Australia's, the total value of exported cultural commodities is much higher. Though Indonesia is somewhat of a 'silent' player in terms of contributions to global popular culture, it is thoroughly entwined in the global cultural economy through physical trade of production and reproduction technologies and material commodities.

The results here do not shed light on the proportion of exported sound recordings and printed and published material (books, magazines etc) that contain domestically produced material – or are recordings or reproductions of books and written material conceived elsewhere. This would have a significant impact on royalties earned from the trade in these particular commodities. However, in the case of exports of recorded music (sound recordings), these significantly increased in 2000 – from approximately $300,000 to over $26million (though this figure would decline in 2001-2002). In this instance, external factors help explain why this rise was forthcoming, and indeed, it is possible to discuss how it was largely the case that the sound recordings exported were not of Indonesian music, but of overseas groups and recording artists, whose albums were reproduced in large quantities in Indonesia and exported back to those countries (and to others where those groups and artists are distributed). A crucial policy decision was made by Australia's federal government at this time to allow parallel importing into Australia – the practice where CD recordings are produced in, for instance, Indonesia, and then exported to Australia, even though that particular recording is also reproduced by local CD manufacturing firms. Previously, and under considerable pressure from the Australian Recording Industry Association (ARIA), parallel imports were banned, as a means of protecting local CD manufacturers (the argument that was put was that parallel imports would hurt royalties flowing to Australian artists, as a result of poor capacity to track sold recordings back to their point of distribution). Subsequently, in 2000 imports of more cheaply reproduced CDs flooded the Australian market, almost exclusively from Indonesia. Yet the trade has since declined – as Australian branches of international record companies decided not to replace domestic production for most major titles with Indonesian imports. Instead, Indonesian music imports to Australia now fill a particular niche: only available in 'budget' or 'warehouse' style retail CD shops, petrol stations and other low-cost outlets. The vast majority of CDs available in main street music stores and shopping malls is still either locally reproduced or imported from Europe and North America (essentially the concern of Australian retailers was that Indonesian-produced CDs were of a lower quality, and thus would be best available for sale in sale in 'budget' outlets – thus not directly competing with the established retail market).

Table 5 shows imports of commodities using the same categories as Table 3. Radio and television transmitters, cameras, photographic and cinematographic goods are major import items overall, as well as toys and games and musical instruments. Overall the levels of imports have been much lower, though, than exports – both in relative terms across the years for which data was extracted, and in raw dollar terms for particular sectors.

Table 5. Imports of cultural products, Indonesia 1996-2002 (US$'000)

HS CODE	COMMODITY DESCRIPTION	1996	1997	1998	1999	2000	2001	2002	TOTAL
8525	Radio and TV transmitters, television cameras	$369,143	$339,764	$103,805	$51,481	$69,704	$53,907	$240,147	$1,227,951
8529	Parts for radio, tv transmissi-on, receive equipment	$404,873	$245,635	$64,278	$35,693	$43,558	$61,946	$53,078	$909,059
37	Photographic or cinematographic goods	$126,844	$130,993	$49,931	$67,415	$73,595	$59,392	$65,969	$574,140
95	Toys, games, sports requisites	$45,439	$43,494	$16,268	$10,866	$27,237	$36,172	$51,908	$231,384
8528	Television receivers, video monitors, projectors	$3,694	$6,766	$3,668	$13,097	$64,925	$59,021	$56,790	$207,961
8527	Radio, radio-telephony receivers	$77,063	$54,335	$16,329	$6,426	$15,523	$18,416	$13,131	$201,224
92	Musical instruments, parts and accessories	$28,854	$32,191	$28,279	$17,404	$30,251	$18,181	$38,478	$193,638
8518	Audio-electronic equipment, except recording devices	$23,890	$26,534	$8,161	$9,576	$26,331	$20,287	$30,505	$145,285
4901	Printed reading books, brochures, leaflets etc	$19,244	$27,457	$7,256	$3,741	$7,094	$9,057	$6,363	$80,213
8522	Parts, accessories of audio, video recording equipment	$15,941	$14,991	$7,334	$5,768	$7,295	$7,883	$10,638	$69,851
8524	Sound recordings other than photographic equipment	$14,175	$6,792	$7,177	$4,418	$3,508	$4,727	$4,039	$44,837
4902	Newspapers, journals	$13,483	$11,103	$3,960	$3,405	$3,791	$4,290	$3,483	$43,514
8523	Prepared unrecorded sound recording media (non-photo)	$12,892	$5,109	$4,635	$4,315	$6,999	$4,728	$2,230	$40,909
97	Works of art, collectors pieces and antiques	$13,656	$2,730	$309	$13,091	$5,051	$908	$1,074	$36,821
4911	Printed catalogues, pictures, photos	$6,983	$6,903	$3,470	$3,402	$4,105	$4,807	$5,458	$35,127
8521	Video recording and reproducing apparatus	$5,495	$4,151	$1,009	$3,308	$7,218	$1,772	$4,264	$27,216
8519	Electronic sound reproducing equipment, non-recording	$1,248	$5,136	$1,595	$1,548	$4,094	$1,701	$1,806	$17,128
8520	Electronic sound recording equipment	$4,843	$3,836	$265	$324	$704	$1,132	$1,473	$12,577
4906	Postcards, greeting cards	$117	$117	$170	$68	$2,250	$500	$143	$3,366
4906	Architect plans	$345	$1,562	$425	$206	$306	$327	$88	$3,258
4905	Maps, charts, atlases	$1,637	$176	$98	$69	$190	$131	$274	$2,575
4910	Calenders	$443	$385	$256	$233	$353	$254	$382	$2,306
4903	Children's books	$287	$280	$49	$195	$276	$254	$400	$1,742
4904	Music, printed or manuscript	$52	$120	$11	$24	$26	$46	$111	$391
	Import total	$1,190,642	$970,561	$328,741	$256,072	$404,385	$369,839	$592,233	$4,112,472

Source: United Nations (2004)

NOTE: totals do not always exactly equal sum of cells due to rounding.

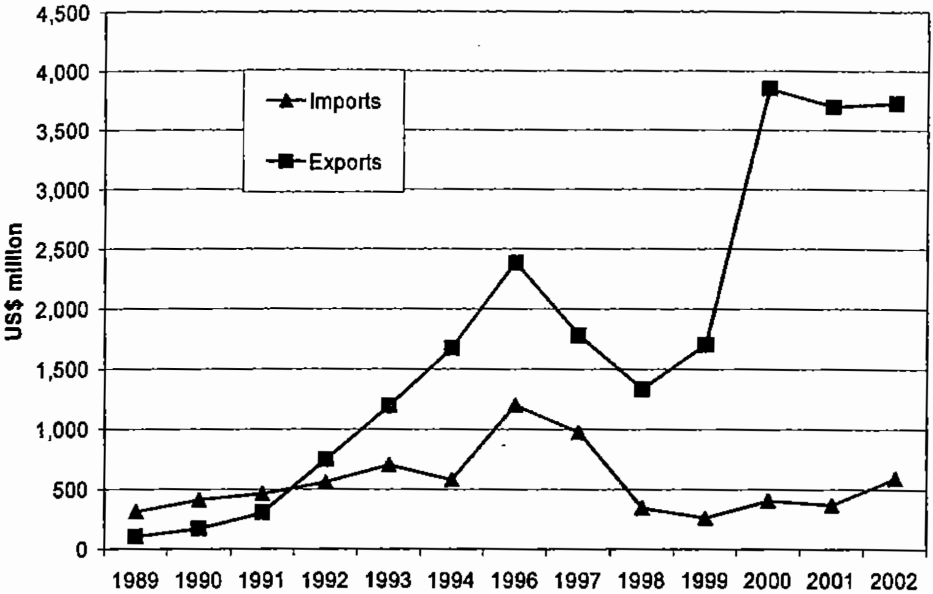

Figure 1. Total exports and imports of cultural commodities, Indonesia, 1996-2002

Figure 1, for comparison shows imports and exports for a longer period of 1989 -2002, for all cultural commodities (except for 1995, in which key data was not available). It demonstrates the quite substantial growth in the cultural economy over this period. Results also confirm the hypothesis raised above, about the extent to which Indonesia's cultural economy is both connected to wider political and economic influences (such as the crisis and political instability) and to patterns of consumption amongst the growing middle class. Both exports and imports grew steadily in the earlier half of the 1990s, with exports gaining greater pace towards the middle of the decade. Both imports and exports fell away in 1997-1998. But imports of cultural products have remained at roughly similar levels since. The crisis may well have had a consolidating effect on cultural consumption, as citizens return to more austere spending and symbolic forms of consumption. During this period, it was probably also the case that cultural firms in radio, television, broadcasting and publishing did not order as much new equipment, using existing facilities in the meantime.

To provide greater detail, Table 6 breaks down the balance of trade for cultural products in seven commodity groupings, for the latter half of that period. It illustrates that in every year, including the crisis, Indonesia was a net exporter of cultural goods (to the tune of over US$3.1 billion in 2002). This was largely propped up by electronic goods, radio and television parts, broadcasting equipment, but also by toys, games, sporting equipment and musical instruments, all of which have been large export earners. Both sound recordings, printed books, newspapers, music and works of art/antiques categories fluctuated across the sample years – in some years returning higher export balances, in others favouring imports. A trade deficit in these sectors was worse in 1996, prior to the crisis – this was also the year with the highest total imports of cultural goods throughout the 1990s. It reflects the generally higher rates of consumption of overseas cultural goods, as Indonesia reached the apex of its Suharto growth period, and the then greater disposable incomes to spend on luxury and lifestyle items. That these sectors have not since returned to be major net exporters (though the trend has been towards a trade surplus rather than deficit in these sectors) may also reflect cultural factors, such as language and religious barriers that limit the growth potential of, for instance, Indonesian music and films, throughout the region and beyond.

Table 6. Balance of trade in cultural commodities, 1996 – 2002 (US$million)

COMMODITY GROUPING*	1996	1997	1998	1999	2000	2001	2002	TOTAL 1996-2002
Electronic equipment (Audio, Radio & TV)	934.88	875.33	934.65	1,225.66	2,983.96	2,985.99	2.867.47	12,807.95
Toys, games & sporting equipment	359.29	85.95	88.00	209.40	354.67	161.80	116.86	1,375.96
Musical Instruments	79.33	21.35	34.24	66.27	147.97	188.02	199.37	736.54
Sound recordings	-13.78	-5.94	-5.78	3.53	22.68	37.35	5.56	43.61
Works of art, collectors pieces and antiques	-12.38	0.43	4.07	-8.32	-1.07	3.90	3.19	-10.19
Printed books, newspapers, music and pictures	-43.48	-44.31	-24.67	3.31	2.11	2.85	0.09	-104.10
Photographic and cinematographic goods	-124.09	-128.64	-42.30	-61.13	-67.34	-54.02	-60.55	-538.07
Total balance of trade	1179.77	804.17	988.21	1,438.72	3,442.97	3,325.87	3,131.99	14,311.70

Source: United Nations 2004

* *The full list of HS classifications have been condensed here into 7 groupings, for ease of interpretation*

The COMTRADE database also enables users to trace cultural imports and exports to particular trading partners. Table 7 shows summary figures for the whole period 1996-2002 for the top ten importers and exporters of cultural goods to and from Indonesia. These illustrate in further detail the position of Indonesia's cultural economy in global networks of commodity flow. In addition to the United States and Britain, both of which were major importers of Indonesian cultural commodities, other major export partners were in the immediate region (Singapore, Japan, Malaysia, Australia), other western European nations (France, Germany, Belgium), or were linked to Indonesia either because of older colonial or religious linkages – hence the Netherlands and the United Arab Emirates were both major export partners. There were some variations between trading partners between years – Australia, for instance, was one of the top five import partners in 1998, but had fallen out of the top ten by 2002.

Table 7. Major trading partners, cultural commodities, 1996-2002

TOP EXPORT PARTNERS (1996-2002)			
Rank	Partner Title	Trade Value US$ million	% of total
1	USA	5,021.74	27.2
2	Singapore	3,927.98	21.3
3	Japan	2,228.76	12.1
4	United Kingdom	754.93	4.1
5	Germany	644.90	3.5
6	France	599.43	3.2
7	Malaysia	477.05	2.6
8	Netherlands	470.68	2.5
9	Belgium	374.20	2.0
10	United Arab Emirates	359.40	1.9
	Other partners	3,620.97	19.6
	Total	18,480.03	100.0
Top 10 import partners (1996-2002)			
Rank	Partner Title	Trade Value US$ million	% of total
1	Japan	611.74	14.7
2	Sweden	451.99	10.8
3	France	392.81	9.4
4	Germany	390.92	9.4
5	USA	386.52	9.3
6	Singapore	293.84	7.0
7	China	289.87	7.0
8	Rep. of Korea	274.94	6.6
9	Free Zones	163.25	3.9
10	Australia	117.33	2.8
	Other partners	795.12	19.1
	Total	4,168.33	100.0

Source : United Nations 2004

When broken down into individual commodity categories, the particularity of international networks for cultural production becomes clearer: Sweden (US$444 million), France (US384 million) and Germany (US$ 346 million) remained the largest import partners throughout the period in the category of electronic equipment (audio, radio and television); regional nations such as Singapore, Malaysia, Australia, Korea, PR China and Cambodia were major importers and exporters of printed books, newspapers, magazines, as well as musical instruments; Arabic and other South and Southeast Asian nations were the largest importers of Indonesian photographic and cinematographic equipment. Works of art had a somewhat diverse geography of imports and exports. Alongside regional nations such as Thailand, Japan, China, Singapore, India and Malaysia were major import and export partners including Ecuador, Spain, Viet Nam, Australia and the Netherlands. Exports of sound recordings grew substantially through this period, particularly to Australia, the United States and Singapore. Results demonstrate the effects of changes in policy discussed earlier: exports to Australia grew from just US$214,000 in 1998 to over US$2.38 million in 2002 – an increase of over 1000 percent. As these more detailed figures demonstrate, Indonesia is integrated into a global cultural economy in complex ways – beyond patterns of broad increase/decrease in exports and imports of cultural commodities there are no simple trends to observe which fit across different kinds of cultural production. A raft of economic, political, geographical and cultural factors shapes the kinds of networks of production and circulation for cultural commodities, and Indonesia's place within these.

CONCLUSION

This article has sought to document selected aspects of Indonesia's cultural economy. The two data sources used shed some light on the constitution and position of Indonesia's cultural economy, though they by no means provide a comprehensive assessment. Clearly, further work remains to be done. Our article responded to an observed neglect in the literature on cultural economy, of perspectives and experiences beyond the Anglo-American 'core'. It also sought to discuss cultural economy as a phenomenon that extends beyond specific regions or cities (the locales characterising most studies adopting this framework). It thus responds to Yeung's (2003:109) criticism of the geographical and thematic biases in the discipline:

Traditional economic geography has been concerned mainly with explaining patterns and processes within national space-economies. When such work is done within the Anglo-American countries, the subsequent models and theories are deemed universally true and applicable... Although some aspects of the economic geographies of Asia have already received research attention, many complex economic geographic processes in Asia have been undertheorized in the geographic literature.

In contrast to existing studies (e.g. Howkins 2001), we would argue that our pilot study demonstrates how cultural economy could be better theorized through an understanding of the situatedness of cultural production and consumption at multiple scales. At a conceptually simple level, Indonesia's mix of economic development priorities, geographical position and cultural diversity mean that its particular configurations of cultural economy are enormously different to those in America or Europe (or even nearby Australia). Trade statistics demonstrated how vulnerability to inter-scalar processes such as the Asian financial crisis and political instability impacted on production and personal consumption of culture. This is likely to vary in different ways within Asia. The crisis had a clear impact on exports, which rose again with later political stability, but also affected imports of cultural goods in a more permanent fashion within Indonesia. Post-crisis austerity – interpreted here as symbolic consumption 'learned' by citizens in harder times – may well have shaped broad trends in imports, which have become more expensive with the devaluation of the Rupiah, and out of reach from the average person. At the same time, exports have rebounded and continue to grow, no doubt spurred on by the continued relative low wage levels in Indonesia. This element of Indonesia's integration into the global cultural economy alone raises many issues surrounding ethical labour practices (Connor 2000), and 'hidden' geographies of production, largely invisible when an international customer purchases a cultural product. These complicate many of the understandings of cultural economy that have emanated from the West.

By observing that which is unique about the Indonesian cultural economy, we do not wish to necessarily emphasise a totally relativist account of cultural economy – where every place in every time is infinitely different from another. Some initial observations here suggest that, though uniquely positioned in a global cultural economy, within Indonesia characteristics of cultural production in other places are reproduced. In particular patterns of metropolitan primacy – the agglomeration of cultural firms as in the West – demonstrates a similar spatial pattern across diverse places. What this might suggest (and again, it requires further examination in the Indonesian context) is that more deep class processes govern the production and consumption of the cultural economy, mirroring socio-spatial divisions in the wider economy. Cities are places where industrialisation and diversification is heightened under capitalism, and these characteristics ultimately set the stage for the growth of further service industries – including cultural production. Cities are also places where lifestyle and other attractions draw in cultural firms (access to international fashions and trends, visiting exhibitions, films, touring artists etc), and enable them to reach a larger middle class market. The rise of the middle class in Asian cities is still very much a metropolitan phenomenon, as was the case in the West, bringing to light issues about internal distributions of resources, wealth and capital, and concentrations of consumption in particular urban complexes. What further research could shed light on is the extent to which these deeper class processes interact with local circumstances (for instance, the politics and demographics of inter-provincial relations in Indonesia), in shaping the domestic context within which cultural economy emerges. This, in addition to situating Indonesia's cultural economy in international trade flows, will go some way to developing theories of cultural economy that respond to and build upon – rather than ignore – this dynamic and illuminative set of Asian economic experiences.

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