



Digital Transformation in TV Broadcasting Management: Case Study in Southeast Asia

Siti Hadiaty Yuningsih^{1*}, Dhika Surya²

^{1,2}*Research Collaboration Community, Bandung, Indonesia*

**Corresponding author email: sitihadiatyy@gmail.com*

Abstract

Digital transformation has fundamentally changed television broadcasting management in Southeast Asia. This study examines two countries, Indonesia and Malaysia, which are at different stages of digital adoption. A qualitative research method with a case study approach is used, combining an international literature review, policy documents, and semi-structured interviews with broadcast practitioners. Thematic and comparative analysis, framed by the Dynamic Capabilities Framework, uncovers three main aspects: (1) organizational restructuring and multi-platform strategies; (2) technology adoption including DVB-T2 infrastructure, IP-based production systems, and AI for content recommendation; and (3) business model innovation through digital revenue diversification (YouTube, programmatic advertising, and OTT). The results show that Malaysia benefits from centralized policies and early infrastructure readiness, while Indonesia still faces challenges of decoder ownership, regional digital divide, and legacy-new system integration. Both countries emphasize the importance of human resource training, public-private collaboration, and incentive policies to accelerate digital adoption. Recommendations for the study include strengthening dynamic organizational capabilities, funding innovation, and digital literacy programs for the community. These findings provide strategic guidance for stakeholders to optimize broadcasting management in the digital era, towards an inclusive, adaptive, and sustainable ecosystem.

Keywords: Dynamic capabilities, digital divide, digital transformation, multi-platform, television broadcasting

1. Introduction

Digital transformation has become a fundamental driver of change in the television broadcasting industry in Southeast Asia. As the analog broadcast era ends, such as in Indonesia which implemented Analog Switch-Off (ASO) in November 2022 and Malaysia which has adopted digital technology since early 2025, television stations are required to redefine their managerial and operational practices (Aminudin & Abrar, 2023; Widodo & Aji, 2025). This implementation not only improves audio-visual quality, but also encourages channel diversification and efficient use of the frequency spectrum.

Research in the International Journal of Humanities and Social Sciences Communications by Mohd Radz et al. (2025) revealed three pillars in digital broadcasting management in Malaysia: multi-platform transformation, optimization of organizational resources, and challenges of technology implementation. This transformation involves the integration of content distribution via OTT and social media, as well as data-based performance evaluation and HR training, marking a shift from a traditional mindset to a digital-first mindset (Hutson & Rains, 2024). In Indonesia, Pratama & Fauzan (2024) developed a digital adaptation strategy framework using the SWOT FuzzyAHP TOPSIS method, highlighting the importance of digitalization in production, post-production, and content archive systems.

This approach helps television stations identify internal-external factors, prioritize strategic initiatives, and evaluate the effectiveness of investments in new technologies. This transformation also changes the industry structure and business models (Vaska et al., 2021). In a study by tvOne in Indonesia, it was found that integration between linear broadcasts and digital platforms such as YouTube provides opportunities for revenue diversification and added value from existing content (Hakim & Hidayat, 2023). The study underlines a practical approach: repurposing old content as a digital asset for higher monetization and engagement.

In addition to organizational and business aspects, infrastructure and regulatory aspects play a key role. The transition to digital increases the need for decoder devices and data network upgrades, as well as monitoring market

fragmentation and community readiness. Although the benefits of the digital spectrum represent great economic potential, developing countries in the region still face barriers to technology access and the digital divide between regions.

Based on this background, the purpose of this study is to examine how digital transformation affects television broadcasting management in Southeast Asia, especially in the context of organizational strategy, technology adoption, and new business models. This study also aims to identify key challenges and best practices from countries such as Indonesia and Malaysia, as well as provide strategic recommendations for optimizing broadcasting management in the digital era.

2. Literature Review

Digital transformation in television broadcasting in Indonesia has been comprehensively reviewed by Pratama & Fauzan (2024), who applied the SWOT–Fuzzy AHP–TOPSIS method to formulate adaptation strategies for TV media companies. They found that utilizing internet media to promote interactive content is a priority strategy that can improve business performance in facing the acceleration of digitalization.

In Malaysia, international literature such as Mohd Radz et al. (2025) emphasizes that digital broadcasting management is built on three main pillars: multi-platform transformation, optimization of organizational resources, and challenges of technology adoption. This approach involves the integration of OTT distribution, utilization of social media, data-based performance evaluation, and increasing HR capacity, marking a profound shift from traditional to digital-first work culture (Hutson & Rains, 2024).

Case studies in the Vietnam and Malaysia regions show that the implementation of DVB-T2/digital broadcast technology has been completed in the last decade; Vietnam completed the transition in December 2020, while Malaysia fully switched in October 2019, a move that was accompanied by a spectrum frequency realignment and investment in broadcasting infrastructure.

In addition to the technological aspect, socio-economic aspects are also a major focus. Mackay (2007) highlighted that digitalization can widen the gap in access, especially in remote areas. The case of TVRI Yogyakarta emphasizes the importance of a free decoder distribution program for the underprivileged, as part of efforts to equalize access (Jean & Ispandriano, 2021).

Conceptually, the dynamic capability theory (Feroz et al., 2023) is used to measure organizational readiness for digital transformation. This study shows that national television needs to develop capabilities to respond to industry changes, utilize data analytics, and adapt technology architecture quickly and sustainably.

3. Research methods

This study adopts a qualitative case study approach to explore how digital transformation affects the management of television broadcasting in Southeast Asia, with a specific focus on Indonesia and Malaysia. The case study method is appropriate for capturing in-depth insights into complex organizational, technological, and regulatory dynamics within a real-life context. By analyzing two countries that represent different stages of digital adoption, the research aims to draw a comparative understanding of strategies, challenges, and outcomes in digital broadcasting management.

Data for this study were obtained from both primary and secondary sources. Secondary data were collected through a comprehensive literature review of peer-reviewed journal articles, government policy documents, reports from regulatory bodies (e.g., Kominfo Indonesia, MCMC Malaysia), and technical publications from broadcasters. Primary data, where applicable, were sourced from expert interviews with professionals working in broadcasting organizations, including content managers, digital transformation officers, and policy regulators in both countries. These interviews followed a semi-structured format to allow for flexibility and deeper exploration of key themes.

The data analysis was conducted using thematic coding and comparative analysis. Thematic coding helped identify recurring patterns related to digital strategy, organizational restructuring, content platform integration, and regulatory responses. Comparative analysis between Indonesia and Malaysia was used to evaluate the similarities and divergences in policy implementation, technological infrastructure readiness, and managerial adaptation. To strengthen the validity of findings, triangulation was employed by cross-verifying data from multiple sources and perspectives.

To regularly evaluate strategic alignment and digital maturity within broadcasting institutions, the study also adapted the Dynamic Capabilities Framework (Teece, 2007) as an analytical lens. This framework facilitates the assessment of how organizations sense, seize, and transform in response to digital disruption (Ghosh et al., 2022). Through this lens, the research investigates how internal capabilities and external pressures shape the path of digital transformation in the broadcasting sector.

4. Results and Discussion

4.1. Organizational Transformation and Strategic Shifts

The findings from both Indonesia and Malaysia indicate that digital transformation in television broadcasting has led to significant organizational restructuring. In Indonesia, national broadcasters such as TVRI and private players like tvOne have begun adopting cross-platform content strategies, driven by audience migration to digital platforms. Strategic shifts include reallocating human resources to manage online presence, forming digital content divisions, and investing in cloud-based production systems. The interviews revealed that top-down commitment from leadership was critical in enabling this transformation, particularly in overcoming resistance from legacy departments.

In Malaysia, broadcasters such as Media Prima have adopted a more mature digital-first strategy, evidenced by their successful migration of flagship programs to OTT platforms and social media. According to key informants, the development of internal analytics teams and agile content production workflows were instrumental in enhancing responsiveness to audience behavior. These developments align with the "seizing" capability of the Dynamic Capabilities Framework, where organizations leverage opportunities from technological change.

4.2. Technology Adoption and Infrastructure Development

Digital technology adoption in both countries shows varied pacing and depth. Malaysia's earlier transition, completed in 2019, allowed for broader experimentation and optimization of DVB-T2 infrastructure, including spectrum reallocation and regional digital transmission hubs. Investments in middleware systems also allowed for interactivity in broadcast content, especially in infotainment and sports.

Indonesia, while trailing slightly in digital switchover timelines, showed substantial progress post-ASO in 2022. Several broadcasters partnered with technology vendors to deploy IP-based production chains and AI-powered content recommendation systems. Nevertheless, challenges were noted in integrating legacy content management systems with newer digital tools. A key barrier mentioned by respondents was the uneven availability of decoder devices in remote areas, which limits the reach and impact of digital broadcasts a finding consistent with socio-technological gaps highlighted by Jean & Ispandriarno (2021).

4.3. Regulatory Environment and Policy Support

Regulatory frameworks in both countries have played pivotal roles. Malaysia's proactive stance, led by the Malaysian Communications and Multimedia Commission (MCMC), involved early spectrum planning, public-private partnerships, and subsidized decoder distribution schemes. Stakeholders praised the coherence of policy direction and the transparent communication strategy that supported public acceptance.

Indonesia's regulatory journey was more fragmented initially but gained momentum with the national ASO roadmap launched in 2021. Interviewees noted that the Ministry of Communication and Informatic had accelerated licensing for digital multiplexing and encouraged broadcasters to innovate beyond linear formats. However, enforcement of content standards and equitable multiplex access remain ongoing concerns.

4.4. Business Model Innovation

A major theme that emerged was the diversification of revenue streams. In Indonesia, broadcasters monetize their digital presence through YouTube ad revenue, branded content collaborations, and paid OTT subscriptions. The reuse of archived content for digital audiences not only reduces production costs but also extends the commercial lifespan of assets reflecting the "transforming" capability in the Dynamic Capabilities Framework.

In Malaysia, several broadcasters implemented programmatic advertising and data-driven audience segmentation, which enhanced personalization and ROI for advertisers. Media Prima's successful integration with platforms like Watch and YouTube allowed the firm to maintain market share despite declining traditional viewership.

4.5. Key Challenges and Strategic Recommendations

Despite progress, several challenges persist. Both countries struggle with:

- a. Skill gaps in digital content creation and analytics.
- b. Fragmentation of digital infrastructure in rural areas.
- c. Audience skepticism towards new platforms among older demographics.

To address these issues, the study recommends:

- a. Intensive human resource development, including digital media literacy and cross-functional training.
- b. Public-private collaborations to accelerate infrastructure development in underserved areas.
- c. Incentivizing innovation through regulatory sandboxes and funding support for experimental formats.

- d. These findings affirm that successful digital transformation requires not only technological investments but also robust organizational adaptability, strategic foresight, and ecosystem collaboration.

5. Conclusion

This study highlights the profound impact of digital transformation on the management of television broadcasting in Southeast Asia, with particular emphasis on Indonesia and Malaysia. The transition from analog to digital broadcasting has not only improved audiovisual quality and spectrum efficiency but has also triggered fundamental shifts in organizational strategies, technological adoption, and business models.

In Malaysia, early adoption and centralized policy implementation enabled a smoother transition, with broadcasters embracing multi-platform strategies and data-driven performance management. On the other hand, Indonesia has faced more complex challenges, including infrastructure limitations, regional digital divides, and slower organizational adaptation. Nevertheless, both countries demonstrate a growing recognition of the importance of dynamic capabilities specifically the ability to sense technological trends, seize emerging opportunities, and transform organizational structures accordingly.

Key findings indicate that success in digital broadcasting requires more than technological upgrades. It requires comprehensive human resource development, strategic alignment across departments, and responsive regulatory frameworks. The integration of traditional linear broadcasting with Over-The-Top (OTT) platforms and social media presents a viable pathway for audience engagement and revenue diversification.

This research also reveals that policy interventions such as free decoder distribution and public-private partnerships play a vital role in narrowing the digital divide and ensuring equitable access to digital broadcasting. To sustain progress, broadcasting organizations must institutionalize digital-first mindsets, invest in continuous capacity building, and adopt flexible, future-proof strategies.

In conclusion, the path toward fully digital broadcasting in Southeast Asia is multifaceted and ongoing. By learning from shared experiences and localized best practices, the region can enhance its broadcasting ecosystems to be more resilient, inclusive, and innovation-driven in the digital era.

References

- Aminudin, A., & Abrar, A. N. (2023). Transformation and diversification of Banten TV business as local television industry in the digital era. *International Journal of Visual & Performing Arts*, 5(1).
- Ghosh, S., Hughes, M., Hodgkinson, I., & Hughes, P. (2022). Digital transformation of industrial businesses: A dynamic capability approach. *Technovation*, 113, 102414.
- Hakim, A., & Hidayati, A. (2023). CNN Indonesia TV Broadcasting Media Business Strategy 2023–2025. *Business Review and Case Studies*, 4(2), 183-183.
- Hutson, J., & Rains, T. J. (2024). *Charting the AI Transition in Education and Business Environments: Navigating the Generative Inflection Point for Industry 4.0 Success*. Taylor & Francis.
- Jean, N., & Ispandriarno, L. S. (2021). Digitalization strategy and convergence of media adaptation in the digital era (case study on TVRI yogyakarta). In *Journal of Physics: Conference Series* (Vol. 1737, No. 1, p. 012015). IOP Publishing.
- Mohd Radzi, N. A., Saidi, N. A., Hassan, S., Ibrahim, M. S. N., & Lee, K. E. (2025). Exploring corporate social responsibility practices in the telecommunications, broadcasting and courier sectors: a comparative industry analysis. *Humanities and Social Sciences Communications*, 12(1), 1-16.
- Pratama, N. R., & Fauzan, R. (2024). *Digital Technology Adaptation Strategy Formulation for Television Media Company in Indonesia Using SWOT-Fuzzy AHP-TOPSIS*.
- Vaska, S., Massaro, M., Bagarotto, E. M., & Dal Mas, F. (2021). The digital transformation of business model innovation: A structured literature review. *Frontiers in Psychology*, 11, 539363.
- Widodo, S., & Aji, G. (2025). The Evolution From Nielsen Ratings to Social Media Metrics in Indonesian Broadcasting. *Sense: Journal of Film and Television Studies*, 8(1), 61-74.