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<td>Author(s)</td>
<td>Abdul Razak</td>
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Report Of Survey On Indonesian Provincial Media

By

Abdul Razak
ACKNOWLEDGEMENT

The survey on Indonesian's community press, which was carried out in February to March 1990, involves many people to whom the Survey Project Consultant owes gratitudes.

My personal gratitude goes to the Central Executive Board of Indonesian Journalists' Association (PWI Pusat), Indonesian Publishers' Association (SPS Pusat), PWI Chapter executives in Bali, Surabaya, Medan, Padang, and persons listed below.

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My thanks also go to Dr Benjamin V. Lozare, Dr Victor Valbuena, Anura Goonasekera, Vijay Menon, and staff of AMIC.

It is my sincere hope that this AMIC-sponsored Survey Report shall contribute to better understanding of Indonesia.

June 1990
Jakarta

Abdul Razak
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I. INTRODUCTION

This Report sums up the findings in a survey on Indonesian Community Press as part of an Asia-wide survey for the Rural Press Consultancy Project, commissioned by Asian Mass Communication Research and Information Centre (AMIC) of Singapore.

The Indonesian Press Survey, which was carried out by Abdul Razak as a Project Consultant, attempts to evaluate the status and potentials of Indonesia's community newspapers, and identify the parameters for their success and failure, and problem areas where appropriate and practical solutions could be developed.

The Survey covers four Indonesia's press centers - Denpasar in Bali, Surabaya in East Java, Medan in North Sumatra, and Padang in West Sumatra.

These provincial capitals were selected for their specific characteristics in terms of geography, economy and locations.

* BALI is the only province where the majority (85.6 percent) of its population (2.8 million) are Hindus and its economy is strongly influenced by tourism (350,000 tourist arrivals a month).

* SURABAYA is Indonesia's second industrial city, a growing base for driving socio-economic development toward East Indonesia.

* MEDAN in North Sumatra is the initial 'breeding ground' of the Indonesian national language, Bahasa Indonesia.

* PADANG in West Sumatra is one of the country's educational centers.

Newspapers visited in the survey are:

1) 'Bali Post' daily in Denpasar
2) 'Surabaya Post' daily in Surabaya
3) 'Harian Surya' daily in Surabaya
4) 'Waspada' daily in Medan
5) 'Analisa' daily in Medan
6) 'Sinar Indonesia Baru' daily in Medan
7) 'Haluan' daily in Padang
8) 'Singgalang' daily in Padang
9) 'Semangat' daily in Padang
10) 'Canang' weekly in Padang

The newspapers are considered as 'community papers' for two reasons. They are published in provincial capitals and focus more on news of local relevance. However, their readerships and influence could well match up to some of their national competitors.
On the contrary, the publishers and editors of community papers claim theirs as ‘national newspapers,’ and compete for readers with bigger and nationally circulated dailies from the nation’s capital of Jakarta.

II. ASSUMPTIONS

The survey is based on Dr Benjamin Lozare’s Conceptual Framework to determine the two dimensions of success for community newspapers. The first concerns the newspaper’s capability for long-term self-sustaining growth. The second relates to its level of contribution to community welfare in political, social, and economic development.

Self-sustaining growth is defined as the newspaper’s economic viability with income exceeding expenses.

Development is formulated as a community’s control over its future or its capability for self-determination. This conceptualization of development implies the importance of two-way communication, a true dialogue among community members. Therefore the basic role of a community newspaper is to enhance this dialogue and strengthen community’s capability for self-determination.

The conceptual framework suggests that for community newspapers to survive and grow, and thereby, contribute to community development, they should be able to 1) manage finances, 2) market/sell newspapers to readers, 3) sell space to advertisers, in a contextual environment where 4) readers’ purchasing power and 5) literacy rate support newspaper business.

It is generally assumed that a newspaper sells if it gives readers information of functional relevance and readability through an efficient, effective distribution network.

However, they could be unexplained variances even after all sources have been exhausted. The unexplained variances could include conditions (factors) that affect the success or failure of a community newspaper.

In addition, five other predeterminant factors could affect newspaper management. These are 6) availability of capital and cost of finance, 7) availability of financial management skills, 8) newspaper’s ability to provide relevance and readable information to attract readers, 9) marketing/distribution skills and systems, and 10) access to relevant advertisers.

These variables are likely related to other determinants: 11) organizational management skills, 12) commitment and dedication of newspaper management, 13) degree of editorial skills, and 14) the use of appropriate technology.

The 14 variables form a system of inter-related factors, a sequence of causative relationships that affect newspaper management to survive, grow and serve community.
However, recent studies suggest that three variables - editorial skills, ability to attract readers by providing relevance and readability, and ability to market/sell newspaper - tend to be the key determinants to newspaper's capability for self-sustaining growth and contributing to community development.

The key variables are defined as follows:

* Quality of editorial skills refers to an overall summary measures of editorial judgement and skills in news coverage planning, copywriting and editing, layout and design, etc.

* Use of appropriate technology reflects newspaper's ability to respond to readers and advertisers' needs for quality print. Advertisers who wish to place color advertisement would naturally go to papers capable of producing what they want.

* Newspaper staff commitment and dedication have been proven the single most important variable that could compensate for weaknesses in the other variables.

* Organizational management skills would enable newspaper to put together the various elements of financial, sales, marketing and editorial management.

III. METHODOLOGY

Data were collected through 1) questionnaires, 2) face-to-face personal interviews with the newspaper editors, publishers and staff, and 3) evaluative interviews with independent evaluators.

The surveyor visited newspapers in four cities and discussed with the publishers and editors about matters covered in the questionnaires to get emphatic explanations — attitudes, views, perception, practice, opinion — from their experiences.

However, there are limitations as to the generalizability of the survey results. The respondents' answers to questions and issues could be subjective — seen and perceived from their own perception. But the probable bias was verified by independent evaluators.

IV. DISCUSSIONS AND FINDINGS

1) AN OVERVIEW OF GENERAL OBSERVATIONS

Indonesian print media now face changing challenges and opportunities, brought partly by the entry of business investors into the media. Consequently, media becomes an industry and the strategy changes from journalistic idealism to outright profit-making. This means newspaper is treated like any other 'commodity' rather than an "intellectual product" for public enlightenment.
Like any manufactured commodity, a newspaper can be "published and be damned." In the past, newspapers carry social and political missions -- for public information, and education.

Big investors in Indonesia turn to print media business as a "new gold mine." Big business want to make profit, secure power and influence public opinion in favour of their group interest.

Media companies have emerged into 'conglomerates' with existing media establishments regrouped into five: Kompas, Suara Pembaruan, Tempo, Metro Pos and Media Indonesia, all based in Jakarta.

Media Indonesia Group, for example, has established through joint management a chain of dozen newspapers in provincial capitals. Kompas Group, itself a multiple publisher, runs joint ventures with Sriwijaya Post in Palembang (South Sumatra), Serambi Indonesia in Aceh, and The Jakarta Post in Jakarta.

Tempo Group holds company shares in Bisnis Indonesia, an economic daily in Jakarta, Jawa Pos in Surabaya, and Fajar in Ujung Pandang (South Sulawesi).

The entry of non-media people intensifies competition in newspaper marketing. "Hijacking" of journalists has become a short cut to recruiting trained editors and staff.

Indonesia has a total of 263 media producing 10.8 million copies of newspapers and magazines. These include 125 media in Jakarta. The rest are printed in Bandung, Yogyakarta, Semarang, Surabaya, Denpasar, Medan, Palembang, Ujung Pandang, Manado.

Of the 125 media published in Jakarta, only 19 newspapers appear daily, including three English language papers - The Jakarta Post (20,000 copies), Indonesia Times (15,000 copies) and The Observer (5,000 copies). The rest are weekly papers and periodical popular magazines.

The Jakarta dailies put out 2.2 million copies. They are nationally distributed and competing with provincial papers. The weeklies produce 2.5 million copies.

In Jakarta magazines outnumber daily newspapers by four to one with a circulation of two million copies.

All the media combined produce 10.8 million copies for Indonesia's 179 million population. The media-reader ratio is 1:16.

Based on Unesco's 1:10 standard ratio, there is room for seven to eight million more newspaper copies to publish in Indonesia in order to provide one copy for 10 readers.
TABLE 1
INDONESIA'S PRINT MEDIA AND CIRCULATIONS

<table>
<thead>
<tr>
<th>Media</th>
<th>Number</th>
<th>Circulation/Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Newspapers</td>
<td>60</td>
<td>3,716,056</td>
</tr>
<tr>
<td>Weekly Newspapers</td>
<td>89</td>
<td>3,444,802</td>
</tr>
<tr>
<td>Weekly Magazines</td>
<td>30</td>
<td>1,721,130</td>
</tr>
<tr>
<td>Forthnightly Magazines</td>
<td>37</td>
<td>1,159,422</td>
</tr>
<tr>
<td>Monthly Magazines</td>
<td>36</td>
<td>704,526</td>
</tr>
<tr>
<td>Bimonthly Magazines</td>
<td>1</td>
<td>10,000</td>
</tr>
<tr>
<td>Quarterly Magazines</td>
<td>1</td>
<td>5,500</td>
</tr>
<tr>
<td>Bulletin</td>
<td>9</td>
<td>21,573</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>263</strong></td>
<td><strong>10,783,009</strong></td>
</tr>
</tbody>
</table>

Sources: Ministry of Information, Deppen RI, PPJ 1989-90

2) BALI PROVINCIAL NEWSPAPERS

OVERVIEW

BALI (area: 5,560 sq.kms) has a population of 2.8 million with 400,000 people in Denpasar, the provincial capital. Population grows by 1.5 per cent annually. Labor force totals 1.7 million people aged 15 plus.

Bali is divided into eight districts, one municipality, 79 urban villages, and 590 rural villages. Population density is 514 persons per sq.km.

The economic mainstay depends on tourism, hotel business, agriculture, light and handicraft cottage industries.

Literacy levels were estimated at 85 per cent with students (primary to university levels) totalling 45.3 per cent of aged 6-29 population.

An average of 350,000 tourists per month visit Bali, renowned as traveller's "Paradise Islands."

Based on Unesco's 1:10 standard media ratio, Bali provides readership potential for at least 286,000 newspaper copies. But today, the three local papers come up with only 50,000 copies.

Profile: BALI POST Daily

Bali Post, considered a typical community newspaper, comes up 12 pages on weekdays and Sundays, in broadsheet nine-column format, with front-page color pictures. The editor claims a circulation of 55,000 copies. But the local Information Office put the figure at 27,530 copies.

The paper also publishes ~30,000 copies of weekly supplementary edition for villagers.
Forty per cent of the daily copies are locally sold with 30 per cent in Denpasar. The rest goes to neighbouring provinces in Nusa Tenggara.

Seven per cent of its readers are university graduates, 67 per cent high school graduates. By age, 41 per cent are adults, 59 per cent youths — apparently dependent members of readers' families.

The other two newspapers are Nusa Tenggara, (14,000 copies) and weekly Karya Bakti (10,000 copies). However, audited sold copies could be less than the reported circulation.

Nusa Tenggara publishes 13,800 copies of 4-page Saturday rural supplement for practically free distribution to 590 villages in Bali.

The rural edition, which carries government news, practical tips for farming and village family stories, comes under a government-aided 'Koran Masuk Desa' (Newspaper Enters Villages) program. The ministry of information subsidises Rp 43 per copy to cover printing cost. The 'mother paper' pays the balance and collects whatever income it can get from subscription and advertising, if any.

Bali Post is managed by the publisher's family. It owns a 10,000 copies/hour Web Offset press, a Linotron-202 phototype setter, six personal computers, a zinc-plate maker, and a film-making camera. A page-maker is needed to replace manual paste-up and improve lay-out design.

Bali Post has 156 full-time personnel, including 38 staff editors. The paper retains a dozen correspondents in Bali and in Jakarta.

The staff is headed by the president-director, concurrently publisher, editor-in-chief and owner. His son, a 28-year old journalism graduate of Gajah Mada University of Jogyakarta is Deputy Chief Editor.

INTERVIEWS WITH THE EDITORS

Discussions with Bali Post's publisher/editor-in-chief Mr K. Nadha and his deputy, Mr ABG Satria Naradha:

With high literacy rates, Bali has readership potential for more newspapers. But local papers find it hard to boost circulation and sales.

Today, one in three newspaper copies sold in Bali is flown in from Surabaya, capital of neighbouring province, and Jakarta, 2,000 kms away from Bali.

According to the Information Office, media-reader ratio in Bali stands at 1:61 for local papers, and 1:46 with outside newspapers included.
Local paper circulation could be increased if the difficulties as perceived by the editor were solved.

Bali Post has a problem of low capacity printing press. The existing three units enable the paper to print color on front and last pages only. It needs an additional unit and color separation facilities to produce quality print and meet demand of advertisers. For color separation, the paper has to go to a company in Surabaya for help.

Newspaper price dumping practised by outside papers makes it difficult for local dailies to compete. It must be stopped.

Low advertising rate makes it hard to earn adequate revenues. Local business depend less on newspaper advertising. Big agencies ask for discount of up to 50% off the rate.

Furthermore it has become difficult to recruit local people to do streetsales, apparently due to full employment. Young people are choosy and are unwilling to do low-paying jobs, the editor says.

EVALUATORS' COMMENTARIES

Two independent evaluators from Bali Information Office, Drs Ketut Wirata Sindhu and Drs I. Gusti Ngurah Gde, and one economist, Drs I. Gde Sudibia made the following comments:

* Local newspapers face "frequent" personnel turn-over, indicating internal management problems. "Many young reporters use the company as a training house, and jump to other newspaper companies after they have acquired adequate job experience." This is indicative of the "lowly rated" morale and esprit de corps of the newspaper management and staff.

* Quality of staff leadership was rated "moderate" and "low."

* Quality of editing, design and layout of local papers were unanimously rated "moderate." Ability to attract readers on the basis of relevance and readability was rated "moderate." This results in the paper's small circulation as compared to Bali's readership potential.

* The paper's organizational effectiveness and efficiency, management and staff morale and esprit de corps were rated "moderate and low."

* Despite "high" literacy levels, people's purchasing power for reading materials was rated "moderate" and "low."

* Bali Post has a "public image problem" resulting from "its past affiliation with the nationalist party."
The evaluators from the Information Office noted the paper's "tendency of being overly critical against the government" has frequently invited official intervention "to tone down its critical reporting."

However, the paper was lauded "highly" for helping the plight of marginalized people in Bali.

* The contents of Bali Post and Nusa Tenggara show similarity in emphasis as shown in the table.

"The editors do not believe that editorial differences are an essential quality to excel on the market."

<table>
<thead>
<tr>
<th>Types of News</th>
<th>Bali Post</th>
<th>Nusa Tenggara</th>
</tr>
</thead>
<tbody>
<tr>
<td>Politics</td>
<td>39.7</td>
<td>39.68</td>
</tr>
<tr>
<td>Social Welfare</td>
<td>31.53</td>
<td>31.53</td>
</tr>
<tr>
<td>Economic</td>
<td>28.77</td>
<td>28.79</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>100.00</strong></td>
<td><strong>100.00</strong></td>
</tr>
</tbody>
</table>

Source: Bali Information Office
3) EAST JAVA PROVINCIAL NEWSPAPERS

OVERVIEW

East Java (area: 47,900 sq.kms) is Indonesia's second populous province after West Java (pop.: 34.2 million) with 32.7 million, 18% of the country's 179.6 million population. Surabaya, a second industrial center, has 2.5 million population.

Twenty-two per cent of East Java's 15 million labor force work in manufacturing, 36% in services; the rest in agriculture, stock farming, fisheries, and handicraft.

East Java's economy grows at 7% a year. But income per capita seems to level off at US$249, slackened by 1.3% annual population increase. Indonesia's per capita income is US$550.

The province is one of Indonesia's three rice-bowls with output exceeding local consumption.

Literacy levels were reported at 74 per cent (83% males, 65% females), according to UNICEF.

With a population density of 692 persons per sq. km, East Java is divided into 29 regencies, eight townships, 8,350 villages.

Based on UNESCO's 1:10 media-reader ratio, East Java has a readership potential for at least 3.2 million copies of daily newspapers. Surabaya alone needs 250,000 copies.

But today, six dailies in Surabaya turn out 536,000 copies, and three weeklies 79,000 copies. (Figures were unaudited.)

Jawa Pos, the oldest, has grown dramatically in readership only recently after the management joined hands with a Jakarta "press lord" reportedly ambitious "to rule the information wave."

The daily, founded in July 1949, took 37 years to go "big." In 1986, the paper "merged" with Jakarta Tempo Group - dubbed by peers as "press conglomerate". It aspires to be East Java's largest circulation paper.

But its competitor, Surabaya Post, an afternoon daily, found Jawa Pos "disturbing and rocking the boat" through "alleged unfair sales competition."

The dramatic growth of Jawa Pos was also seen "threatening" national papers out of the market. This brings counter reactions that turn Surabaya into a "battleground" for big newspapers scrambling for readerships. They prefer Surabaya because the city is a practical "beachhead" for paper expansion to Eastern Indonesia.

A third paper, Surya, turns daily after joining media groups, Kompas and Poskota of Jakarta. Under the joint management, Surya bought new offset press, recruited 125 staff editors and reporters, spent for salaries alone Rp 90 million a month, equalling the total expenses of a medium newspaper.
Awakened by the competitive environment, Surabaya Post bought a new offset printing press to replace the old one.

A lesson learned from the scene suggests that editorial excellence is insufficient, must be backed up by marketing.

Jawa Pos has to launch aggressive promotion and marketing even if the paper presents a relatively excellent editorial contents. But its overdoing it was threatening local papers out of markets.

The paper was reportedly successful in winning readerships. One adult in five in Surabaya reads Jawa Pos on a single day, according to Survey Research Indonesia. "But its success bruises fellow publishers and editors," an editor says.

Jawa Pos now claims a circulation of 300,000 copies and one million readers.

Despite the looming threats, four other local dailies seem to stay on the sideline, doing the routine as if there’s none to worry about.

Memorandum daily reported a circulation of 60,000 copies. Suara Indonesia claims 30,000 copies, Bhirawa 10,000 copies and Karya Darma 30,000 copies.

Three weeklies turn out an average 5,000 copies each. Six smaller magazines (weeklies, bi-monthlies, monthlies) put out 5,000 to 10,000 copies each according to the Information Ministry.

Brief profiles of the two newspapers surveyed:

Profile: SURABAYA POST daily

The afternoon paper, which was founded by husband and wife, Mr A.Azis and Mrs Toety Azis on 1st April 1953, publishes 85,000 copies, 12 pages on weekdays, 16 pages on Wednesdays and Sundays. Her husband, co-founder of the paper, died in 1984, leaving his wife to lead the management.

It employs 200 personnel, half of them on the editorial staff and bureaus in Malang and Jakarta.

The paper uses computerised copy setter. But it still needs page-makers to replace manual paste-up procedures.

Staff regeneration is progressing to meet changing environment. The advent of stronger competitor, Jawa Pos, prompts a change in editorial and marketing policies.

The management seems to rely on reader’s loyalty. But it realizes that loyalty should be supported by better service, relevant information and readable paper.

Surabaya Post bought a new 45,000 copies/hour printing press an hour, color pages. The paper sells at Rp 300 per copy.
The front and back pages appear with color pictures. The inside pages are split into two pages for city and provincial news, one Opinion page, one for economic/trade news, two pages for national and world news. Back page is reserved for sports news. On Wednesday, it appears three pages for science, technology, leisure features. Sunday edition offers more features.

The paper fills up 30 to 35 percent of the space with display and classified ads.

Surabaya Post claims a total readership of 320,000 persons.

INTERVIEW WITH SURABAYA POST PUBLISHER/EDITOR

Mrs Toety Azis, publisher/editor and owner of Surabaya Post, has reoriented the editorial management following the dramatic surge of its competitor, Jawa Pos daily.

Although her paper is the sole afternooner in East Java, Surabaya Post has to counter an aggressive marketing and prevent from losing readership. She claims that Jawa Pos resorted to "unfair, often unethical marketing strategies" in a bid to become East Java's largest daily.

Two Jakarta "press lords" have tried unsuccessfully to bring Surabaya Post to their "camps" through joint management. But the lady editor prefers to stand on her own.

Editors agree that Surabaya has turned into a new "battleground" for local and national newspapers to control readership, believing that a paper could easily expand eastward from a firm base in the strategically located Surabaya. Jakarta papers, such as Kompas and Suara Pembaruan, have each sold over 20,000 copies in Surabaya and nearby towns.

Surabaya Post seems to have "internal problems" indicated by slow creativity and personal rivalry. Her "charismatic leadership" brought up a working environment that motivates staffers to look for favor from the boss. Although they know that executive leadership is ggradually delegated, the two managing editors and two deputies take turns discretely to ingratiate with the boss.

Profile: SURYA Daily

Surya, the youngest paper, started out weekly in June 1986, and turned into a morning daily, 12-page broadsheet in January 1990. The editor claims a circulation of 100,000 copies, selling at Rp 300 per copy.

Its design lay-out resembles USA Today with block layout, three-color flag (red, green, black), color pictures and headlines on front and back pages.

Surya is a provincial paper. However, the publisher insists to make it a national daily as epitomized by its motto 'From Surabaya to all over Indonesia.'
The editorial contents project Surya as a general newspaper with backpage for sports news. Inside pages are divided into two pages for local city and provincial news, two pages for economic and trade news, one page for opinion, features and lifestyle, one for worldnews, and one for sports.

Surya's readership profile indicates no specific market segment. Some 20 per cent of its readers are civil servants, 15 per cent members of the armed forces, 40 per cent businessmen, and 15 per cent students.

Surya's newsroom is 'reinforced' with loan staff from Kompas daily. The paper has 400 personnel, including 130 on the editorial staff, 40 in circulation, 10 in advertising, and 90 in administration.

Surya owns a high-speed, 100,000 copies/hour offset press. Composing is computerised. The four offset units produce color pages with lay-out designed by page-makers.

INTERVIEW WITH SURYA PUBLISHER/EDITOR

Discussions with Mr Ivans Harsono, Surya chief editor, indicates an all-out effort to revive the paper into a full-fledged daily. But he faces staffing problems. Most of his editorial staff are new recruits.

The paper gets staff reinforcement from co-investor Kompas to fill executive positions in newsroom and administration.

Compared with local papers, Surya is well-staffed. Sixty per cent of them were recruited from university graduates. But the editor sees well-trained staff and individual journalistic capability still lacking.

External problems to be sorted out include high competition that forces the paper to operate at high promotion costs.

So far Surya sells 10 per cent of space to advertisers. Dependence on ads booking agencies and competition in giving bigger discount rates put Surya at a disadvantage. Big advertising agencies, which are concentrated in Jakarta, control advertisements flow.

Despite intensive promotion, Surya has yet to find out appropriate editorial contents to meet readers' want. The paper sells through agents and streetsales.

Surya operates on a high overhead costs, spending Rp 90 million a month for wages alone.

The editor will still have to prioritise on staff training.
SUMMARY OF EVALUATOR’S COMMENTS:

Drs Amak Syariffudin, former staff editor and a faculty member of the Surabaya Institute of Communication Science, was asked to comment in the survey.

He rated Surya daily "low" on business volume, break-even points, net returns, and circulation as percentage of total potential readership, and "very low" on the paper’s ability to sell advertising space. But he rated "moderate" on quality of editing, layout design, and "very low" on ability to attract readers on the basis of the paper’s relevance and readability.

He rated "very low" on the paper’s organizational effectiveness and efficiency, and "moderate" on staff and management’s morale and esprit de corps, and leadership.

East Java community’s purchasing power with reference to ability to buy newspaper was rated "moderate" in line with "moderate" literacy rates.

***

Surabaya Post was rated "high" on capital availability, business volume, and net returns. But the paper remains "moderate" on circulation compared to local readership potential.

Quality of editing, layout design was rated "high" but its ability to attract readers remains "moderate." This was probably due to "moderate" organizational effectiveness and efficiency. Morale and esprit de corps were "very high" but quality of leadership was "moderate."

Jawa Pos was rated "high" on almost all counts - business volume, capital, editing, layout design, staff morale. Nevertheless, it has to work harder to win advertisements. Its ability to attract readers was still "moderate," indicating "moderate" leadership and organizational effectiveness.

Another paper, Memorandum was rated "low" on many aspects of newspaper and editorial management. The evaluator attributed them to "very low" organizational effectiveness, staff and management morale to work in a community of "moderate" literacy levels and readers’ purchasing power.

(pcfile:report2/df5)

13
4) NORTH SUMATRA PROVINCIAL NEWSPAPERS

OVERVIEW

Twelve newspapers - seven dailies and five weeklies - scramble for the same readerships among North Sumatra’s 10.3 million population. Although reading habit is high, newspaper circulation remains disproportionately low.

The whole dailies put out 200,000 copies, and the weeklies 106,000 copies. Three magazines turn out 115,000 copies. But audited sold copies could be lower.

The papers rely on streetsales. Only one-third goes out for home delivery subscription.

By Unesco’s standard ratio 1:10, North Sumatra should at least produce one million newspaper copies to serve 10.3 million people, with 75 per cent adults.

North Sumatra is economically better off. The economic mainstay depends on agriculture, forestry, cash-crop exports, plantation, fishery, processing industries, mining, tourism, wholesale and retail trade.

Literacy rate is over 75 per cent, with primary to university students totalling 25 per cent of the population in any year.

North Sumatra (71,000 sq.kms) has a labor force of four million people. Population density is 146 persons per sq.km in the 11 districts, six townships and 5,600 villages.

Medan has a two million population, with 50% adults (aged 15 plus).

Three newspapers, Waspada, Analisa, Sinar Indonesia Baru, all have their own printing presses, were visited in the survey.

Profile: WASPADA Daily

Waspada (literally means 'Vigilant'), one of Indonesia’s oldest dailies, was founded by the publisher’s family in Medan on January 11, 1947.

The nine-column broadsheet paper comes out 12 pages on weekdays and Sundays, 80,000 copies per day. But the Information ministry put the circulation at 45,800 copies.

According to SRI survey data, Waspada is read by 212,000 readers with one out of four adults (age 15+) in Medan and 50 smaller towns in North Sumatra and 30 towns in neighboring province of Aceh in the North. It is also distributed in West Sumatra, Riau and Jakarta.
The daily, published in Bahasa Indonesia, presents general news (local and foreign) - home affairs, world news, comic strips and sports. It relies on UPI and ANTARA for world and regional news.

The paper employs 260 personnel with 80 in the news room. The founder's family members head the editorial, business and advertising departments. The paper retains 50 correspondents.

In 1983, a fire accident gutted down the newspaper's premises.

Waspada owns a new high-speed, 45,000 copies/hour Web offset press imported from West Germany.

The company makes Rp 4.5 billion (US$2.5 million), and spends Rp 3.9 billion ($2.1million) a year, giving net earnings of Rp 393 million ($216,000).

The holding company's fixed and current assets were estimated at Rp 1.3 billion but its current liabilities equal to half of the asset values.

INTERVIEW WITH WASPADA EDITORS

Discussions with the paper's executive editor, Mr. Teruna Jasa Said, and staff indicate difficulties in increasing circulation. It relies mostly (95%) on streetsales. "Newspaper sells only when there is big news outbreak."

On slow days, Waspada has to do "advocate journalism," playing up news on social and economic issues that affect laymen, the so-called "marginalised" in the community. But it is "risky" because local authorities tend to be "overly reactive" to critical reporting.

Waspada makes soccer a "selling point" because sports is a "free" subject to report and sell newspaper. The paper gives prominence to soccer games, particularly when local teams play in national or international competitions.

The editor admits his staff need continual retraining to cope with changing conditions, and organizes in-house workshop programs for editorial staff and correspondents.

Profile: ANALISA Daily

The paper, published in Bahasa Indonesia, focuses on economic and political news to serve readers and ethnic Chinese community in Medan. The editor says that business people read Analisa for commodity market quotations.

The paper, first published on March 23, 1972, turns out 50,000 12-page copies in 9-column broadsheet. Distribution covers all over Sumatra, with wider spread in North Sumatra and Aceh.
Sixty percent of its readers subscribe the paper through delivery agents or direct to company. The rest goes to streetsales and newsstands at Rp 350 (US$0.19) a copy.

On Tuesdays and Fridays, Analisa appears 16 pages. On average Analisa sells 20 per cent space to advertisers.

The paper employs 113 personnel, including 37 staff editors, who are well paid by local standards. Salaries range from Rp 450,000 (US$250) for reporters, Rp 900,000 ($500) for desk staff to Rp 1.2 million ($750) for executive editors. They get fringe benefits, health care, and annual bonus.

The holding company earns Rp 2 billion and spends Rp 1.8 billion a year. After-tax profit amounts to Rp 122 million (US$67,000).

INTERVIEW WITH ANALISA EDITOR

Discussions with the chief editor, Mr Soffjan and his deputy, indicate that 50,000 copies as the circulation limit for any local newspaper under the present social economic condition. "People's purchasing power is still low."

The editor sees a widening rich-and-poor gap as a result of rising living costs. People shift spending priorities to more urgent needs - food, children education, utilities.

However, it does not mean that people cease reading newspapers. In small towns and villages,"they go to coffee stalls where newspapers are provided for free shared reading by customers."

One newspaper copy is read by an average four persons. Analisa claims a readership 200,000 persons - the maximum it could reach.

High distribution costs also affect sales because of geographic spread-out of the market.

He perceives the majority of the people, particularly in Medan, read serious newspapers for information and "social prestige." Preference to national papers is high because people perceive social prestige from reading Jakarta papers.

Like in other Indonesian urban centers, serious papers command a relatively large readership. Newspapers are perceived "serious" when they report policies, analyses, and complicated issues from national and international scenes.

In Medan, interpretative reporting is made difficult because official news sources tend to be less cooperative with reporters. "It is not because they have something to hide from the press, they are not free to give information," the editor says.
Profile: SINAR INDONESIA BARU Daily

The paper, founded on May 9, 1970, publishes 40 to 50,000 copies with 60 per cent for streetsales. However, its editorial contents differ very little from other general newspapers which run national, local, crime, world news, and sports news.

This newspaper seems to capitalize on "racial solidarity." It is editorially designed to cater to readers from the publisher's own community - people from Tapanuli (Bataks) in northern part of the province. But copies are also sold in Aceh, Jakarta, Bandung and Surabaya.

The paper appears 12 pages in broadsheet, nine-column format, and plans to go 16 pages when it manages to sell more space to advertisers.

INTERVIEW WITH THE EDITORS

Discussions with managing editors, Mr M. Zaki Abdullah and Mr Oloan S.L. Tobing indicate difficulties in securing advertisements.

They cited two reasons -- stringent competition in the market, and lack of competent and aggressive ads salesmen. "We are forced to give discount of up to 70 per cent off the ads rate to secure placement from big advertising agents."

The paper finds it equally difficult to boost circulation. The reasons cited were 1) people in townships and villages read papers but seldom buy copies, and 2) low purchasing power for newspapers. "They go to coffee shops to read newspapers provided for free shared reading."

The paper faces technical problem with its low-capacity printing press producing 10,000 copies an hour. High-speed and bigger capacity press is needed to gain time for morning newspapers to reach readers on time.

In North Sumatra, papers are delivered in company-owned vans to distant destinations, resulting in high operational overhead costs.

Competition by national papers makes it difficult for local dailies to gain wider readerships. Jakarta national papers relegate local newspapers to second choice in readers' preferences. "Readers perceive social prestige by showing themselves in public as readers of elite national papers."

The editor sees the need for training in newspaper and editorial management to enhance staff capability in newspaper editorial and business management.

(pcfile:report3/df5)
5) WEST SUMATRA PROVINCIAL COMMUNITY PAPERS

OVERVIEW

West Sumatra (area: 42,300 sq.kms) is sparsely populated with 98 persons per sq.km. It has 4.1 million population, of which 400,000 people in the provincial capital of Padang. Labor force (aged 15 +) totals 1.5 million. Population grows 1.9 per cent annually. Literacy covers more than 85 per cent.

The province is divided into eight regencies, six municipalities, 10 townships, and 3,500 villages. Its topography features four lakes and 18 mountain chains of 1,000 to 3,000 meters above sea levels.

Average distance of towns is 100 kms, with the nearest 56 kms and the farthest 168 kms from Padang where newspapers are published.

The economy, growing at 5% annually, depends on agriculture, forestry, handicraft, mining, export trade and tourism. Annual exports account for over US$150 million. Income per capita was estimated at US$235, less than half of the nation's per capita GNP.

Education gets top priority. Students (primary to university levels) account for 50 per cent of 6 to 29 years old population. The rest goes out for employment.

Based on UNESCO's standard media-people 1:10 ratio, West Sumatra has readership potential for at least 400,000 copies per day. But the three local dailies and one weekly put out only 75,000 copies. Editors single out low purchasing power as the probable cause of low circulation.

Brief profiles of the papers:

Profile: HALUAN Daily

Haluan, literally means 'Direction' was founded in 1949, closed for ten years by the authority in 1958, and resumed publication in 1969. Many of its former staff editors moved out to publish their own papers.

The newspaper appears 12 pages in broadsheet 9-column format with a circulation of 25,000 copies, selling at Rp 300 per copy. Ninety percent of the copies are subscribed, mostly by Padang city residents.

Sixty per cent of circulation go to as far as Jambi, Riau and Pakanbaru, about 500 kms away from Padang. This explains why Haluan has to maintain company-owned vans to deliver copies to subscribers in distant places.

The company owns a 10,000 copies/hour offset printing press that operates only two hours a day. The excess capacity remains idle for lack of orders.
News copies are processed in compugraphic machine, but paste-up remains manually done.

The company employs 97 personnel, including 33 staff editors and reporters, six in advertising, 23 in circulation/sales, and four in administration.

Corporate shares are held by employees on a cooperative ownership arrangement.

***

Profile: SINGGALANG Daily

Singgalang started out weekly in 18th December 1968 by a team of four former Haluan staff editors. Ten years later (Dec. 18, 1979), the paper switched into a morning daily.

Today Singgalang appears 12 pages in 9-column broadsheet, 11,000 copies per day. Sunday edition, 19,000 copies, are distributed to neighbouring provinces in Riau and Jambi. Some copies also go to Jakarta for people originating from West Sumatra.

The editor claims Singgalang a "community newspaper" which caters to West Sumatran readers. Singgalang also publishes 16-page tabloid weekly under the banner ‘Koran Masuk Sekolah’ or ‘KMS' (Newspaper Enters School Rooms) for junior and high school students.

KMS edition was started as a supplement on October 30, 1984, and becomes a special Tuesday edition since September 1989 under a separate editorial management.

The KMS tabloid, with color front page, carries information and practical tips for students. This edition, which reports about student activities and profiles, goes out through school principals in West Sumatra, Riau, Jambi, Bengkulu. Students are encouraged to contribute stories, poems, sketches to the paper.

Singgalang put out 16-page Sunday edition for distribution in Java. It also publishes 4-page rural edition since 1979 under the government-subsidized ‘Koran Masuk Desa' (Newspapers for Villagers).

The company bought a new 25,000 copies/hour offset press, Harris V15D.

Profile: SEMANGAT Daily

Semangat (literally means "Enthusiasm"), which was first published on April 17, 1965 seems to have lost its ‘enthusiastic spirit'. Circulation has dropped from 39,000 copies to 5,000. Revenues seldom suffice to pay salaries for its 70 personnel, including 30 staff editors.

19
The 8-page broadsheet morning daily has been financially supported by its patron, the information department of the local military command. The paper serves as Kodam information media.

The editor, Mr. H. Wahidin, says the paper faces a deficit of two to three million rupiahs per month. Advertising income is minimal, insufficient to cover newsprint costs.

The paper lacks professional personnel. Most of them are freelancers who come and go at will.

Printing facilities need to be replaced if the paper wishes to survive but the company lacks capital.

The editor admits problems on all counts—management, capital, advertising, printing facilities, and could not help save the paper from becoming a "deadend." But the publisher is negotiating a merger deal with a Jakarta newspaper group which is interested in expanding a chain of newspapers. The group has already controlled dozen provincial papers.

Profile: CANANG Weekly

Canang (literally means 'Gazette') was founded in August 1986 by a former staff editor after resigning from two local dailies.

The 12-page weekly comes out with 5,000 copies, selling at Rp 400 per copy. Its front page presents color flag, pictures and headlines, all lined up to form rather confusing layout design in a 9-column format. The flag is three-colored, black, red and yellow. The editor says the color mix conforms with traditional preferences of the people.

The weekly appears bilingual, Bahasa Indonesia and local language in one page. The company employs 23 personnel, including 10 staff editors.

On the upper right hand of the front page, there is a standard 3-column closed-up picture of local beauty, apparently to catch readers' eyes. But the blurred picture has brief cutlines, and no cover story accompanying it. The front page is "decorated" with bold headlines and 2-column pictures which hardly portray what in it.

Two evaluators, Mr. Amzar Sjafeei, chief of local information office, and Dr. Surya Anwar, assistant dean in Andalas University, were divided in their evaluation.

The information chief rated the weekly "highly" on its appeal to readers. But the scholar rated it "moderate" on relevance and readability, quality of editing and layout design.
SUMMARY OF EVALUATORS' COMMENTS:

The official rated Haluan and Singgalang "very high" on capital availability, business volume, net returns, circulation, ability to attract readers and sell ads space, editing, layout design, readability and relevance to readers.

However, the Andalas university scholar rated "moderate" on the papers' relevance, readability, editing, layout design.

Haluan publisher Mr Kasoema, and editor Mr Annas Lubuk attributed to people's low purchasing power that keeps local paper circulation low. "People here tend to read national papers for prestige and social status." The same arguments were cited by editors of the other three local papers.

Jakarta papers sell over 20,000 copies in Padang. Kompas gets a bigger cake for selling 5,000 copies, but Sinar Pagi, classified as non-serious paper, sells 3,000 copies.

Quality paper refrains from "sin, sex and sensation" stories.

Dr Surya Anwar, who specialises in agricultural development communication, says newspapers sell more if they provide news of functional relevance to readers.

Mr Kasoema cited two probable factors affecting local newspaper circulation. "Lack of dedicated and creative editorial staff, high-cost overhead of distribution." His paper maintains company-owned trucks to deliver papers to distant subscribers, and spends annually Rp 113 million, about 21 per cent of the operation costs, for paper delivery.

Haluan is subscribed by 94 percent of its readers who get copies directly from the company's own delivery system.

Dr Anwar comments that "local paper sells better if it can provide consistently quality editing, and design and readers-oriented information."

Despite low purchasing power, West Sumatran people show high reading habits and literacy. And if a paper sells less, the problems could be found in the newsroom, staff commitment, and organizational effectiveness, he suggests.

In a trip to a small urban village, 30 kms off the provincial capital, the surveyor found people subscribing to Jakarta papers. Asked why they read national newspapers, the answers indicate the paper's relevance and readability. "We want information that helps us understand policies, trends, opportunities and solutions to social and economic problems."

Subjectively, the statements indicate reader's functional needs as a determining factor. People read serious papers because their jobs oblige them to look for usable information that they can act on.
6) NOTES ON RURAL PRESS

The rural press in Indonesia originated in 1980 when the Ministry of Information contracted 34 provincial newspaper companies to publish 4-page broadsheet or 8-page tabloid weekly supplements for village readers.

The rural press is conceived as a newspaper to serve primarily the needs of rural readers, mostly farmers, for useful economic, social and development-oriented information.

The project, carried out under an Information Minister's decision, was based on the grounds that the growth of Indonesian provincial newspapers would "depend very much on reading capability and habit of communities in small towns and villages" throughout the country.

Furthermore, 75 per cent of Indonesia's 179 million population live in 66,391 villages.

Today 50 media participate in the government-subsidized 'Koran asuk Desa' (Newspapers Enter Villages) program, known as "KMD", and produce 463,000 copies a week under a renewable yearly contract.

MD, which comes out 48 editions annually, was intended to promote reading habits and flow of information to village readers and listeners' forums in 26 of Indonesia's 27 provinces.

MD papers carry government news, practical tips on farming, health-care, education. The paper sells at three prices - Rp 75, Rp 200 or Rp 250 a copy - depending on locations.

Copies are distributed through agents (34%), district administration (23%) and the 'mother papers' own network (42%). Of the total, 41 percent are subscribed in bulk by sub-district administration for free distribution, and 32 per cent by individual subscribers.

The information ministry pays Rp 43 per copy, and spends Rp 330 million annually to help KMD publishers cover part of the costs.

The subsidy was designed as a start-up for small, medium-sized provincial media companies to publish KMD editions. It was hoped the firms could eventually become self-sufficient since KMD press was basically to assist the mother papers build up readerships in rural communities.

Over 6.8 million households, 24 per cent of 36 million households throughout Indonesia, have access to electricity. Based on the standard five persons per family, this means 44 million people use electricity and can have access to TV and radio programs.
Exposure to broadcast programs is expected to widen audience intellectual horizon and, eventually develop needs and wants for news information. Nevertheless, studies have yet to be done to know precisely the situation.

After ten years in operation, KMD has still to try harder to come of age. It continues depending on subsidy due to high overhead costs and inadequate revenues. It is indicative of low economic viability due partly to high distribution costs to distant places, lack of advertising revenues, low editorial relevance.

Circulation remains constant in the last seven years with each newspaper turning out 5000 to 10,000 copies per edition.

However, KMD project is considered making headway on two main counts: reported number of published copies and distribution coverage. According to official report, KMD went to 31,450 villages (44.7 per cent of the total). Last year, published copies were reported more than twice the circulation planned in the contracts.

Of the 50 KMD publishers, 28 were rated "successful" in fulfilling their contracts. The rest have still to grapple with constraints and shortcomings.

Eight KMD publishers are "medium-sized" daily newspapers that are doing comparatively well in terms of business volumes and net returns for the dailies, but not for the rural editions. The rest are weeklies struggling to survive from low readerships.

Although potentials of rural readerships are there, the present condition seems unconducive to support the economic viability of KMD press. It continues to depend on the mother paper, meaning that growth of rural press tends to correlate positively with the publishing paper's editorial capability.

Survey evidence shows that much more are demanded of the KMD publishers in editorial skills to attract readers, sell space to advertisers, use of appropriate technology, staff commitment and dedication.

An in-depth study based on the theoretic "co-orientation model" is suggested to determine KMD editor's judgment on newsworthiness and audience interests. The study shall seek out what makes readable and saleable papers for rural readers.
IV. CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

The findings of this survey are summarized descriptively in a format of situation, problem and solution as follows:

1. Indonesian press enters a new phase of development in which 'big league' newspapers gradually, but steadily, drive the financially and editorially "weak" media closer to the wall. The small-sized media, though strongly motivated by idealism, are apparently confined to a stage of "zero sum" condition, or eventual phasing out from the readership market.

Three main trends characterized the new phase. Firstly, media business becomes an industry that involves big capital, high technology, modern management, and aggressive marketing strategy. Investors look at media as a "gold mine" for making profit. The entry of non-press business conglomerates dictate the imperative of profit-making and commercialism in media management.

Secondly, the use of high technology, including remote printing, has become indispensable, to produce quality product and compete for readership market. They would be opted to economize production and delivery to target markets.

Thirdly, commercialism outbids idealism. The shift to commercialism intensifies competition to win readerships and advertisements. It also implies changing media's socio-political role to business institution.

As a social institution, the press serves as public's unelected defender, "eyes" and "ears", practical link of communication to help people make informed judgment on matters of public concern. This conforms with the calling to enlighten people in a search for correct alternative solutions to social, political and economic problems. In a democracy, solving social problems should not be the perceived preserve of the elites if the public were to participate effectively in community development.

Furthermore, journalistic idealism demand the press to provide public forum to test ideas, ideals, and assumptions through discussions so that only well refined ideas shape public policies.

On the other hand, as an industry media business tends to advocate big money interest in line with its responsibility to shareholders.

2. Backed up by favorable condition, the big media get bigger because they have access to financial resources and advertisements. Consequently this could lead to larger companies dominating the media, and leaving smaller ones farther behind.
Any monopoly tends to promote self-interest. Editors perceived that control by small but strong groups could lead to the domination of public opinion. They predict the possibility of the less privileged segments of the society being deprived of their rights to be heard on matters of public concern.

It is generally assumed that power tends to self-aggrandize due to apparent human propensities. If left unconstrained by informed and critical populace, power arrogates more power in an ascending spiral.

3. In general provincial newspapers should differ from national press in terms of geographic distribution and editorial content, based on functional relevance and readability. But the differentiation is vaguely defined, resulting in unclear editorial direction of local papers.

Evidence from the survey shows provincial papers positioning as a national newspaper and duplicating mass media from Jakarta in editorial contents. They put local news into the inside pages, and headline stories of low relevance to local readers.

This results in the provincial papers competing with national papers in their own territories for readerships and advertisements. But in most cases, big league newspapers gain the biggest share.

Newspapers in the provinces rely on ANTARA newswire agency for national and world news. This makes it difficult to differ substantially in editorial content, particularly on overseas news. Big papers can assign reporters to distant spots for scoops to make a distinction. This is perceived as one of probable causes that keeps circulation of local newspapers low as compared to readership potential.

4. The editors perceived community paper different from what has been generally defined. In Indonesia, a rural newspaper could not stand on its own, and has to be a "child" of provincial newspapers. It is published either as a supplement distributed as part of the "mother" paper, or a separate edition under the same management.

The survey evidence shows that rural press is "mothered" by bigger newspaper simply because of its low economic viability to separate from its "parent."

Newspaper is now a multi-billion rupiah venture. A publisher must be ready with back-up financial capital for the first couple of years before the paper reaches break-even points.

5. Exposure to broadcast is expected to widen audience horizon and information needs. The Indonesian TVRI, using Palapa satellite, broadcast 105 minutes of news programs, including 30 minutes news in English.
But like other television, TVRI presents "news headline service," highlighting national and world news. For details, audience has to go to newspapers for details. This gives the opportunities for newspapers to serve them.

Media audiences in Indonesia are categorized by editors into two strata - the middle-up and middle-down. It is assumed that upper class readers seek in-depth reporting to get the perspectives and meanings of facts. The middle-down look for entertainment and surveillance news.

The active information seekers, who are core readers, tend to ask for more analyses, background, impacts and implications of events. They are unsatisfied with mere factual reports. And this explains why some newspapers get wider readerships in the provinces while others fail.

6) Indonesian editors wear many hats. They are also active as a member of parliament, organization executive, businessman, politician, law-maker, public speaker and lecturer. This helps them become very busy and results in their time and attention being diverted to other than the main job.

An editor can also be a publisher at the same time. Many of the newspaper editors are in fact publishers. The Press Act makes it possible. And when things went wrong, editors are held legally responsible.

The recent trend shows senior staff editors being "hijacked" by competitors. Opinions were divided as to the root cause of the turn-over. Some commentators questioned the moral and professional loyalty. But independent observers question the adequacy and effectiveness of personnel management to provide conducive working environment and prospects for staff to grow to the full extent of the possibilities.

7. Editors attributed the problems facing their newspapers to low purchasing power. But evidence show that newspapers grow and win wider circulation if they know what readers want.

Editorial skills and effective management contribute to the ability to attract readers by way of giving functional relevance and readability.

Many of the well-performing papers address the specific information needs of core readerships comprising opinion leaders, intellectuals, bureaucrats, policy makers. Although core readers form a small percentage, they are tactically crucial in building up the media's image and status. This explains why readers in two areas covered in the survey read newspapers for social prestige. People tend to look upward for model to follow.

8) The conclusions in this report were rephrased from the editors' and evaluators' perceptions. Their views and rating of newsworthiness were expected to explain problem areas in mass media management.
Although the sample does not fully represent the whole, the problems identified in the survey could indicate the directions from where intervention for improvement and reorientation could start off.

RECOMMENDATIONS

1. The cases identified in the survey represent a cross section of problems areas in media management, from pre-production to end-product, from reporting to selling newspapers. The fact that readers buy newspapers for functionally relevant and readable information put the nerve center of media management in the newsroom.

In other words, newspaper sells if key "software" variables such as editorial competency, ability to attract readers, staff commitment and dedication, and organizational effectiveness are operating well.

The "hardware" variables (capital, technology, distribution network) would be effective if fully supported by effective "software" factors.

Social conditions (purchasing power, literacy rates) and press freedom provide the contextual environment. Though crucial in newspaper business, the first two variables are beyond the control of media management. However, these factors are the concern of national communication and development policy makers.

Despite the fact, management must select appropriate areas to help increase the survival and prospects of the newspaper.

Proper selection of policy and action sequence must also be considered in putting the various elements of management.

Given this background framework, the survey recommends the following project proposals:

1. Workshop-type reorientation programs for executive level journalists and management personnel. Reorientation implies reviewing and testing of management principles and procedures to suit changing conditions, policies, and objectives of newspaper production.

Subjects for reorientation include newsroom organization and management, pagination and layout design, media photography, designing method and curriculum of in-house training, human resource development (career planning and development), leadership, management communication, and marketing strategy.

2. Skill training workshops for second and third level staff of the editorial and business departments. It is intended to restructure and reformulate working principles and procedures that may have been worn-out for newspaper.
3. Survey study on audience behaviour and needs for reshaping editorial policy and strategy. It is designed to familiarise staff editors with useful and simpler method for identifying possible changes in readers' needs and expectation of media.

4. Setting up of a training center fully equipped with a newspaper laboratory for practical training of journalists. Editors see the need for retraining journalists to fully understand the function of news in a democratic society.
**ANNEX**

**PROFILE OF 'ANALISA' DAILY**

<table>
<thead>
<tr>
<th>Place of publication</th>
<th>Medan, North Sumatra, (Indonesia)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date founded</td>
<td>23 March 1972</td>
</tr>
<tr>
<td>Population of city (1990)</td>
<td>2 million</td>
</tr>
<tr>
<td>Population of province</td>
<td>10.3 million</td>
</tr>
<tr>
<td>Founders</td>
<td>Harta Susanto</td>
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<tr>
<td>Capital Investment</td>
<td>Yayasan Sikap Press</td>
</tr>
<tr>
<td>Owners and Publishers</td>
<td>Jalan Jend. A.Yani 35-43</td>
</tr>
<tr>
<td>Address</td>
<td>Medan 20111</td>
</tr>
<tr>
<td>Editor</td>
<td>Mr Soffyan</td>
</tr>
<tr>
<td>Circulation</td>
<td>40,000 copies</td>
</tr>
<tr>
<td>Area of circulation</td>
<td>Medan, North Sumatra</td>
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<tr>
<td>Language</td>
<td>Bahasa Indonesia</td>
</tr>
<tr>
<td>Frequency</td>
<td>Daily (plus Sunday edition)</td>
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<tr>
<td>Number of pages</td>
<td>12 pages</td>
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<tr>
<td>Selling price per copy</td>
<td>Rp 350 (US$0.19)</td>
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<tr>
<td>Cost price per copy</td>
<td>Rp 240 (US$0.13)</td>
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<tr>
<td>Size of paper</td>
<td>Broadsheets, 9 columns</td>
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**Size of staff:**

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<thead>
<tr>
<th>1) Editorial</th>
<th>113</th>
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</thead>
<tbody>
<tr>
<td>2) Advertising</td>
<td>37</td>
</tr>
<tr>
<td>3) Circulation/Sales</td>
<td></td>
</tr>
<tr>
<td>4) Production</td>
<td></td>
</tr>
<tr>
<td>5) Administrative</td>
<td>76</td>
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**Annual Gross Income:**

<table>
<thead>
<tr>
<th>1) National advertising</th>
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<tbody>
<tr>
<td>2) Local Advertising</td>
<td>na</td>
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<tr>
<td>3) Government advertising</td>
<td>na</td>
</tr>
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<td>4) Subscription</td>
<td>na</td>
</tr>
<tr>
<td>5) Street sales</td>
<td>na</td>
</tr>
<tr>
<td>6) Printing jobs</td>
<td>na</td>
</tr>
</tbody>
</table>

**Expenses:**

<table>
<thead>
<tr>
<th>1) Printing</th>
<th>Rp 1.9 billion (US$1.03 million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2) Salaries</td>
<td>na</td>
</tr>
<tr>
<td>3) Others</td>
<td>na</td>
</tr>
</tbody>
</table>

`pcfile:analisa`
ANNEX

PROFILE OF 'SINAR INDONESIA BARU' DAILY

Place of publication
Date founded
Population of city (1990)
Population of province
Founders
Capital Investment
Owners and Publishers
Address
Editor
Circulation
Area of circulation
Language
Frequency
Number of pages
Selling price per copy
Cost price per copy
Size of paper
Ads rate per mm/column

Medan, North Sumatra (Indonesia)
May 9, 1970
2 million
10.3 million
Mr GM Panggabean
PT Sinar Indonesia Baru
Jalan Brigjen Katamso No.66
Medan
Mr GM Panggabean
Jalan Brigjen Katamso No.66
Medan
Mr GM Panggabean
260
165
5
14
65
11

Size of staff:
1) Editorial
2) Advertising
3) Circulation/Sales
4) Production
5) Administrative

260
165
5
14
65
11

Annual Gross Income:
1) National advertising
2) Local Advertising
3) Government advertising
4) Subscription
5) Street sales
6) Printing jobs

Rp 2.2 billion
na
na
na
na
na

Expenses:
1) Printing
2) Salaries
3) Others

na

Ads figure: Surindo Utama
**ANNEX**

**PROFILE OF 'HALUAN' DAILY**

<table>
<thead>
<tr>
<th>Place of publication</th>
<th>Padang, West Sumatra (Indonesia)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date founded</td>
<td>1949</td>
</tr>
<tr>
<td>Population of city (1990)</td>
<td>700,000</td>
</tr>
<tr>
<td>Population of province</td>
<td>4.1 million</td>
</tr>
<tr>
<td>Founders</td>
<td>Mr H. Kasoema</td>
</tr>
<tr>
<td>Capital Investment</td>
<td>PT Ranah Indah</td>
</tr>
<tr>
<td>Owners and Publishers</td>
<td>Jalan Damar 10, Padang</td>
</tr>
<tr>
<td>Address</td>
<td>Mr Annas Lubuk</td>
</tr>
<tr>
<td>Editor</td>
<td></td>
</tr>
<tr>
<td>Circulation</td>
<td>25,000 copies</td>
</tr>
<tr>
<td>Area of circulation</td>
<td>Padang, Riau and Jambi</td>
</tr>
<tr>
<td>Language</td>
<td>Bahasa Indonesia</td>
</tr>
<tr>
<td>Frequency</td>
<td>Daily (plus Sunday editions,</td>
</tr>
<tr>
<td></td>
<td>and 4-page Rural Press supplement</td>
</tr>
<tr>
<td>Number of pages</td>
<td>12 pages</td>
</tr>
<tr>
<td>Selling price per copy</td>
<td>Rp 300  (US$0.16)</td>
</tr>
<tr>
<td>Cost price per copy</td>
<td>Rp 240  (US$0.13)</td>
</tr>
<tr>
<td>Size of paper</td>
<td>Broadsheets, 9 columns</td>
</tr>
<tr>
<td>Advertising rate per mm/column</td>
<td>Rp 1,500 (US$0.82)</td>
</tr>
<tr>
<td>Size of staff:</td>
<td>97</td>
</tr>
<tr>
<td>1) Editorial</td>
<td>33</td>
</tr>
<tr>
<td>2) Advertising</td>
<td>6</td>
</tr>
<tr>
<td>3) Circulation/Sales</td>
<td>23</td>
</tr>
<tr>
<td>4) Production</td>
<td>3</td>
</tr>
<tr>
<td>5) Administrative</td>
<td>4</td>
</tr>
<tr>
<td>Annual Gross Income:</td>
<td>Rp 1.6 billion (US$ 879,000)</td>
</tr>
<tr>
<td>1) National advertising</td>
<td>12.3%</td>
</tr>
<tr>
<td>2) Local Advertising</td>
<td>15.4%</td>
</tr>
<tr>
<td>3) Government advertising</td>
<td>3.0%</td>
</tr>
<tr>
<td>4) Subscription</td>
<td>65.6%</td>
</tr>
<tr>
<td>5) Street sales</td>
<td>2.3%</td>
</tr>
<tr>
<td>6) Printing jobs</td>
<td></td>
</tr>
<tr>
<td>Expenses:</td>
<td>Rp 1.03 billion (US$566,000)</td>
</tr>
<tr>
<td>1) Printing</td>
<td>53%</td>
</tr>
<tr>
<td>2) Salaries</td>
<td>46%</td>
</tr>
<tr>
<td>3) Sales operation</td>
<td>10.2</td>
</tr>
</tbody>
</table>
**ANNEX**

**PROFILE OF 'SINGGALANG' DAILY**

<table>
<thead>
<tr>
<th>Place of publication</th>
<th>Padang, West Sumatra (Indonesia)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date founded</td>
<td>18 December 1968 (Weekly)</td>
</tr>
<tr>
<td></td>
<td>18 December 1979 (Daily)</td>
</tr>
<tr>
<td>Population of city (1990)</td>
<td>700,000</td>
</tr>
<tr>
<td>Population of province</td>
<td>4.1 million</td>
</tr>
<tr>
<td>Founders</td>
<td>Mr H. Basril Djabar</td>
</tr>
<tr>
<td>Capital Investment</td>
<td>PT Genta Singgalang Press</td>
</tr>
<tr>
<td>Owners and Publishers</td>
<td>Jalan Veteran 17, Padang 25116</td>
</tr>
<tr>
<td>Address</td>
<td>Mr H. Basril Djabar</td>
</tr>
<tr>
<td>Editor</td>
<td></td>
</tr>
<tr>
<td>Circulation</td>
<td>30,000 copies</td>
</tr>
<tr>
<td>Area of circulation</td>
<td>West Sumatra, Riau, Jambi,</td>
</tr>
<tr>
<td></td>
<td>Bengkulu, and Jakarta</td>
</tr>
<tr>
<td>Language</td>
<td>Daily (plus Sunday editions,</td>
</tr>
<tr>
<td></td>
<td>rural weekly, special weekly</td>
</tr>
<tr>
<td></td>
<td>edition for school students)</td>
</tr>
<tr>
<td>Frequency</td>
<td></td>
</tr>
<tr>
<td>Number of pages</td>
<td>12 pages</td>
</tr>
<tr>
<td>Selling price per copy</td>
<td>Rp 300 (US$0.30)</td>
</tr>
<tr>
<td>Cost price per copy</td>
<td>Rp 288</td>
</tr>
<tr>
<td>Size of paper</td>
<td>Broadsheets, 9 columns</td>
</tr>
<tr>
<td>Advertising rate per mm/column</td>
<td>Rp 1,500 (US$0.82)</td>
</tr>
<tr>
<td>Size of staff:</td>
<td>40</td>
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<tr>
<td>1) Editorial</td>
<td>5</td>
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<tr>
<td>2) Advertising</td>
<td>5</td>
</tr>
<tr>
<td>3) Circulation/Sales</td>
<td>5</td>
</tr>
<tr>
<td>4) Production</td>
<td></td>
</tr>
<tr>
<td>5) Administrative</td>
<td></td>
</tr>
<tr>
<td>Annual Gross Income:</td>
<td>na</td>
</tr>
<tr>
<td>1) National advertising</td>
<td></td>
</tr>
<tr>
<td>2) Local Advertising</td>
<td></td>
</tr>
<tr>
<td>3) Government advertising</td>
<td></td>
</tr>
<tr>
<td>4) Subscription</td>
<td></td>
</tr>
<tr>
<td>5) Street sales</td>
<td></td>
</tr>
<tr>
<td>6) Printing jobs</td>
<td></td>
</tr>
<tr>
<td>Annual Expenses (Costs):</td>
<td>na</td>
</tr>
<tr>
<td>1) Printing</td>
<td></td>
</tr>
<tr>
<td>2) Salaries</td>
<td></td>
</tr>
<tr>
<td>3) Others</td>
<td></td>
</tr>
</tbody>
</table>

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pcfile: singgalang
## ANNEX

### PROFILE OF 'CANANG' WEEKLY

<table>
<thead>
<tr>
<th>Place of publication</th>
<th>Padang, West Sumatra (Indonesia)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date founded</td>
<td>6 August 1986</td>
</tr>
<tr>
<td>Population of city (1990)</td>
<td>700,000</td>
</tr>
<tr>
<td>Population of province</td>
<td>4.1 million</td>
</tr>
<tr>
<td>Founders</td>
<td>Mr Nasrul Siddik</td>
</tr>
<tr>
<td>Capital Investment</td>
<td>PT Palanta Raya Press</td>
</tr>
<tr>
<td>Owners and Publishers</td>
<td>Jalan Dr Hamka No. 23, Padang</td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>Editor</td>
<td>Mr Nasrul Siddik</td>
</tr>
<tr>
<td>Circulation</td>
<td>5,000 copies</td>
</tr>
<tr>
<td>Area of circulation</td>
<td>Padang and West Sumatra</td>
</tr>
<tr>
<td>Language</td>
<td>Bahasa Indonesia, and local language</td>
</tr>
<tr>
<td>Frequency</td>
<td>Weekly (plus weekly rural edition)</td>
</tr>
<tr>
<td>Number of pages</td>
<td>12 pages</td>
</tr>
<tr>
<td>Selling price per copy</td>
<td>Rp 400 (US$0.35)</td>
</tr>
<tr>
<td>Cost price per copy</td>
<td>Rp 240</td>
</tr>
<tr>
<td>Size of paper</td>
<td>Tabloid</td>
</tr>
<tr>
<td>Size of staff:</td>
<td></td>
</tr>
<tr>
<td>1) Editorial</td>
<td>23</td>
</tr>
<tr>
<td>2) Advertising</td>
<td>10</td>
</tr>
<tr>
<td>3) Circulation/Sales</td>
<td>2</td>
</tr>
<tr>
<td>4) Production</td>
<td>2</td>
</tr>
<tr>
<td>5) Administrative</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Annual Gross Income:</td>
<td></td>
</tr>
<tr>
<td>1) National advertising</td>
<td></td>
</tr>
<tr>
<td>2) Local Advertising</td>
<td></td>
</tr>
<tr>
<td>3) Government advertising</td>
<td></td>
</tr>
<tr>
<td>4) Subscription</td>
<td></td>
</tr>
<tr>
<td>5) Street sales</td>
<td></td>
</tr>
<tr>
<td>6) Printing jobs</td>
<td></td>
</tr>
<tr>
<td>Expenses:</td>
<td></td>
</tr>
<tr>
<td>1) Printing</td>
<td></td>
</tr>
<tr>
<td>2) Salaries</td>
<td></td>
</tr>
<tr>
<td>3) Others</td>
<td></td>
</tr>
</tbody>
</table>

PCfile: canang
Place of publication: Padang, West Sumatra (Indonesia)
Date founded: 17 April 1965
Population of city (1990): 700,000
Population of province: 4.1 million
Founders: Yayasan Yasebang Kodam III

Capital Investment
Owner and Publisher: PT Semangat Sakti Pers
Address: Jalan Imam Bonjol 50, Padang
Editor: Mr H. Wahidin
Circulation: 6,000 copies
Area of circulation: Padang
Language: Bahasa Indonesia
Frequency: Daily

Number of pages: 8 pages
Selling price per copy: Rp 175
Cost price per copy: na
Size of paper: Broadsheets, 9 columns

Size of staff:
1) Editorial: 70
2) Advertising: 30
3) Circulation/Sales: 2
4) Production: 2
5) Administrative: 2
6) Printing jobs: 8

Annual Gross Income: Deficit (Rp 2-3 million per month)

Expenses:
1) National advertising
2) Local Advertising
3) Government advertising
4) Subscription
5) Street sales
6) Printing jobs

Expenses:
1) Printing
2) Salaries
3) Others
Annex

PRESS CONSULTANCY PROJECT

Survey and Application Form

Name of Community Newspaper ______________________________
Name of Publisher __________________________________________
Name of Editor _____________________________________________
Office Address _________________________________ Tel.: _________

A) Circulation and Sales
1. Present Circulation _______________________________
2. Geographical coverage (Please describe in detail) ___________
3. Please describe how newspaper is distributed _____________
4. Please estimate distribution costs ________________
5. Frequency of publication:
   a) Daily
   b) 2-3 times a week
   c) 4-5 times a week
   d) weekly
   e) Others (specify) ____________________________
6. Cost per copy _______________________
7. Percentage of street sales _________
8. Percentage of subscription sales ________
9. Percentage of complimentary copies ________
10. Any other data you may wish to add about:
    Circulation/Distribution _________________________

11. Please list down any problem/difficulty that you face about
    Circulation/sales: ____________________________

B. Advertising Sales
1. Average sales of advertising per issue _______________________
2. Average percentage of space devoted to advertising __________
3. Cost per column inch of ad space _______________________
4. Percentage of bad debts in ad sales _______________________
5. Percentage of local ads to total ads _______________________
6. Percentage of national ads to total ads ____________________
7. Percentage of government ads to total ads __________________
8. Please list down any problem/difficulty you face about
    advertising sales/production:

C. PERSONNEL
1. Total number of personnel _______________________
2. If possible give breakdown according to the following categories:
   a) Editorial
   b) Advertising
   c) Circulation/sales
   d) Production
   e) Administrative

1
3. Please give a short description of training/education your personnel have:
   A) Editorial
   B) Advertising
   C) Circulation/Sales
   D) Production
   E) Administrative

4. Please attach the salary levels for every category of workers that you have.

5. Please describe any problem/difficulty you face about personnel:

6. Please give your top three priority concern regarding training of your staff:

D. Production

1. Please describe the basic production process that you follow:
   2. Please attach an inventory of machines and equipment that you own.
   3. Please attach an inventory of machines and equipment that you have access to through renting or leasing.

4. Please describe any problem/difficulty you face about printing technology/machines/equipment.

5. What would be your top three priorities regarding printing technology/machines/equipment?

E. Financial Information:

1. Please attach your financial statements (income statements and balance sheets) the past three years. If not available, please provide your:
   a) Estimate of annual revenue
   b) Estimate of annual costs
   c) Estimate of annual earnings after taxes
   d) Estimate of current liabilities
   e) Estimate of fixed assets
   f) Estimate of current assets

2. Please provide a picture of your financial sourcing or capitalization.
   A) Single proprietorship
   1) Amount of owners equity
   2) Amount of borrowed money
   B) Partnerships
   1) Partner's capital
   2) Borrowed money
   C) Corporation
   1) Authorized capitalization
   2) Capital stock
   3) Long-term liabilities

3. Please describe any problem/difficulty you face regarding finances.

4. What would be your top three priority concern regarding financing?

5. Any other problem/difficulty you may wish to add: (pcfile:Guest2)
ANNEX

RURAL PRESS CONSULTANCY PROJECT

The Evaluation Instrument
Delphi Questionnaires

Name of community newspaper being evaluated ____________________________
Location/Address of Community Newspaper _______________________________
Name of Publisher __________________________ Name of Editor ____________
Reported Circulation _____________ Annual Gross Revenue ______________
Annual Net Income ________________ Number of staff ________________

Name of Evaluator ___________________________________________________
Position or title _____________________________________________________
Age ________ Sex ____________________________________________________

DETERMINANT VARIABLES:

Q.1 Please evaluate the availability of financial capital for the community newspaper being rated:

________ 100 Capital requirement fully met
________ 75 High degree of capital availability
________ 50 Moderate degree of capital availability
________ 25 Low degree of capital availability
________ 0 No capital available

Your rating based on scale described above. You may wish to give ratings other than those suggested, e.g. intermediate ratings such as 74, 56, 24, etc.

Q.2 Please evaluate the annual business volume of the newspaper concerned:

________ 100 Break-even points extremely realistic/reasonable
________ 75 Break-even points very realistic/reasonable
________ 50 Break-even points moderately realistic/reasonable
________ 25 Break-even points not very realistic/reasonable
________ 0 Break-even points completely unrealistic/unreasonable

Your rating

Q.4 Please evaluate the net returns of the newspaper

________ 100 Extremely high
________ 75 Very high
________ 50 Moderate
________ 25 Low
________ 0 None or loss

Your rating

Q.5 Please evaluate the newspaper circulation as percentage of total potential readership

________ 100 Extremely high
________ 75 Very high
________ 50 Moderate
________ 25 Very low
________ 0 Extremely low

Your rating
Q.6. Please evaluate the newspaper’s ability to sell advertising space.

100 Extremely high
75 Very high
50 Moderate
25 Low
0 Extremely low
Your rating

Q.7. Please evaluate the quality of editing in the newspaper.

100 Extremely high
75 Very high
50 Moderate
25 Very low
0 Extremely low
Your rating

Q.8. Please evaluate the quality of design and layout of the newspaper.

100 Extremely low
75 Very high
50 Moderate
25 Very low
0 Extremely low
Your rating

Q.9. Please evaluate the ability of the newspaper to attract readers on the basis of relevance and readability.

100 Extremely high
75 Very high
50 Moderate
25 Very low
0 Extremely low
Your rating

Q.10. Please evaluate the organizational effectiveness of the newspaper.

100 Extremely high
75 Very high
50 Moderate
25 Very low
0 Extremely low
Your rating

Q.11. Please evaluate organizational efficiency of the newspaper (measured in a 100 point scale based on Delphi data).

100 Extremely high
75 Very high
50 Moderate
25 Very low
0 Extremely low
Your rating
Q.12. Please evaluate the morale and esprit de corps of the newspaper management and staff.

- 100 Extremely high
- 75 Very high
- 50 Moderate
- 25 Low
- 0 Extremely low

_____ Your rating

Q.13. Please evaluate the quality of leadership in the newspaper staff.

- 100 Extremely high
- 75 Very high
- 50 Moderate
- 25 Low
- 0 Extremely low

_____ Your rating

CONTEXT VARIABLES:

Q.1 Please evaluate the purchasing power of the community specifically with reference to their ability to buy a community newspaper.

- 100 Extremely high
- 75 Very high
- 50 Moderate
- 25 Very low
- 0 Extremely low

_____ Your rating

Q.2 Please estimate the community’s literacy levels.

- 100 Extremely high
- 75 Very high
- 50 Moderate
- 25 Very low
- 0 Extremely low

_____ Your rating

*****

(pcfile:quest1)
CURRICULUM VITAE
June 1990

A. Personal Data:

Name: ABDUL RAZAK
Date of birth: 10 May 1941
Nationality: Indonesian
Birthplace: Medan

Address: PWI Pusat/CAJ
Gedung Dewan Pers, (4th Flr.)
Jalan Kebon Sirih 34
Jakarta 10110
Tel.: (62) 353-175; 353-131

B. Educational Background:

01. Degrees Earned


* Bachelor of Arts in Journalism, Academy of Press, 1959-1963

02. Other Formal Training


* Public Relations Courses, New York University, New York, 1978

* Public Relations Extension Courses, University Indonesia, Jakarta, 1977

* Khalsa English School (Senior), Medan, 1949-59.

C. Fellowships/Scholarships

* Fulbright Scholarship, 1982-84

* Jeffership Fellowship, 1971, East-West Center, Honolulu

D. Professional Background

01. Present Position:

* Journalism Training Instructor
  PWI Pusat (Indonesian Journalists' Association)

* Deputy Permanent Secretary
  Confederation of Asean Journalists.

* Jakarta Correspondent, INTER PRESS SERVICE (IPS)
  Third World News Agency.
02. Past Working Experiences

(1) Antara News Agency (1962-84):

* Staff Editor (on loan), National Development Information Office (NDIO), Jakarta (a government overseas public affairs), 1977-1979.
* Reporter (correspondent), ANTARA Bureau, 1962-1966

(2) Newspapers:

* Chief Correspondent, PERWAKILAN BERSAMA, (Jakarta group bureau for eight provincial newspapers), 1987-1989.

03. Conferences, Seminars, Workshop:

* Workshop on Legislative Reporting, Kuala Lumpur, 2-3 August 1989, organized by Asian Mass Communication Research and Information Centre, the Malaysian Press Institute, and The Asia Foundation.
* Inter Press Service and UNICEF Meeting, Bangkok, 2-4 May, 1989.
* ASEAN News Agencies Meeting, Jakarta, Jan 22-26, 1979.

E. Publication/Book


(pcfile:vitae)
### COUNTRY PROFILE OF INDONESIA 1990

#### AREA

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total land area (thousand sq.kms)</td>
<td>1,919.4</td>
</tr>
<tr>
<td>Agricultural land (% of total)</td>
<td>15.8</td>
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</tbody>
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#### GNP PER CAPITA (US$)

<table>
<thead>
<tr>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>540</td>
</tr>
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#### POPULATION AND VITAL STATISTICS:

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population (thousand)</td>
<td>179,640.6</td>
</tr>
<tr>
<td>Urban pop. (% of total)</td>
<td>26.9</td>
</tr>
<tr>
<td>Male pop. (% of total)</td>
<td>49.8</td>
</tr>
<tr>
<td>Life expectancy at birth (years)</td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>62</td>
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</table>

#### Population growth rates (%):

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>2.1</td>
</tr>
<tr>
<td>Urban</td>
<td>4.5</td>
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#### Population projections:

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pop. in 2000 (million)</td>
<td>222.7</td>
</tr>
<tr>
<td>Stationary pop. (million)</td>
<td>360.7</td>
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#### Population density (per sq.km):

<table>
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<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land</td>
<td>92</td>
</tr>
<tr>
<td>Agricultural land</td>
<td>493.4</td>
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</table>

#### Population Age Structure (% of total):

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-14 yrs</td>
<td>40.4</td>
</tr>
<tr>
<td>15-64 yrs</td>
<td>55.7</td>
</tr>
<tr>
<td>15-29 yrs (youths)</td>
<td>27.2</td>
</tr>
<tr>
<td>65 and above</td>
<td>3.4</td>
</tr>
</tbody>
</table>

#### LABOR FORCE:

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total labor force (thousand)</td>
<td>74,843.0</td>
</tr>
<tr>
<td>Female (% of total)</td>
<td>41.8</td>
</tr>
<tr>
<td>Rural (%)</td>
<td>77.5</td>
</tr>
<tr>
<td>Agriculture (%)</td>
<td>53.9</td>
</tr>
<tr>
<td>Industry (%)</td>
<td>9.3</td>
</tr>
<tr>
<td>Services (%)</td>
<td>15.1</td>
</tr>
<tr>
<td>Trade (%)</td>
<td>14.8</td>
</tr>
</tbody>
</table>

#### Participation rate (%):

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>35.0</td>
</tr>
<tr>
<td>Male (% of total)</td>
<td>49.1</td>
</tr>
<tr>
<td>Female (% of total)</td>
<td>20.3</td>
</tr>
<tr>
<td>Agriculture (%)</td>
<td>42.0</td>
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</table>

#### Age dependency ratio

<table>
<thead>
<tr>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.8</td>
</tr>
</tbody>
</table>
EDUCATION

Enrollment rates:

Primary: Total (%) 113.1
Male (%) 114.2
Female (%) 112.0

Secondary: Total 39.5
Male (%) 42.0
Female (%) 31.0

Pupil-Teacher ratio:
 Primary 28.8
 Secondary 15.7

Pupils reaching grade 6 (%) 78.2

INCOME, CONSUMPTION, POVERTY:

Energy consumption per capita (Kgs of oil equivalent) 204.5

Estimated population below - absolute poverty income:

Total: (million) 30.0
% of total pop. 16.7
Rural (million) 20.3
% of total 11.3
Urban (million) 9.7
% of total 5.4

Newspaper circulation (per 1,000 pop.) 39.8

Newsprint consumption:
 Monthly (tons) 11,513
 Annually (tons) 138,157

Source: Bappenas, Biro Pusat Statistic, etc.
(pcfile:demograf)
### Table 3
INDONESIAN POPULATION AND MEDIA CIRCULATIONS

<table>
<thead>
<tr>
<th>PROVINCES</th>
<th>POPULATION (million)</th>
<th>MEDIA (daily/weekly)</th>
<th>CIRCULATION (000)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aceh</td>
<td>3.32</td>
<td>4</td>
<td>20.8</td>
<td>0.19</td>
</tr>
<tr>
<td>North Sumatra</td>
<td>10.34</td>
<td>15</td>
<td>437.35</td>
<td>4.06</td>
</tr>
<tr>
<td>West Sumatra</td>
<td>4.07</td>
<td>4</td>
<td>76.26</td>
<td>0.71</td>
</tr>
<tr>
<td>Riau</td>
<td>2.81</td>
<td>2</td>
<td>6.9</td>
<td>0.06</td>
</tr>
<tr>
<td>Jambi</td>
<td>2.03</td>
<td>3</td>
<td>17.5</td>
<td>0.16</td>
</tr>
<tr>
<td>South Sumatra</td>
<td>6.10</td>
<td>6</td>
<td>152.56</td>
<td>1.41</td>
</tr>
<tr>
<td>Bengkulu</td>
<td>1.11</td>
<td>1</td>
<td>5.0</td>
<td>0.05</td>
</tr>
<tr>
<td>Lampung</td>
<td>7.53</td>
<td>2</td>
<td>23.22</td>
<td>0.22</td>
</tr>
<tr>
<td><strong>SUMATRA</strong></td>
<td><strong>37.31</strong></td>
<td><strong>37</strong></td>
<td><strong>739.61</strong></td>
<td><strong>6.86</strong></td>
</tr>
<tr>
<td>Jakarta</td>
<td>9.10</td>
<td>121</td>
<td>7,733.42</td>
<td>71.72</td>
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<tr>
<td>West Java</td>
<td>34.16</td>
<td>9</td>
<td>327.47</td>
<td>3.04</td>
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<td>Central Java</td>
<td>28.87</td>
<td>12</td>
<td>444.78</td>
<td>4.12</td>
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<tr>
<td>Yogyakarta</td>
<td>.98</td>
<td>14</td>
<td>354.72</td>
<td>3.29</td>
</tr>
<tr>
<td>East Java</td>
<td>32.76</td>
<td>16</td>
<td>825.2</td>
<td>7.65</td>
</tr>
<tr>
<td><strong>JAVA</strong></td>
<td><strong>107.87</strong></td>
<td><strong>172</strong></td>
<td><strong>9,685.61</strong></td>
<td><strong>89.82</strong></td>
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<td>Bali</td>
<td>2.82</td>
<td>3</td>
<td>51.53</td>
<td>0.48</td>
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<tr>
<td>W.Nusatenggara</td>
<td>3.30</td>
<td>1</td>
<td>3.5</td>
<td>0.03</td>
</tr>
<tr>
<td>E.Nusatenggara</td>
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<td>3</td>
<td>16.0</td>
<td>0.15</td>
</tr>
<tr>
<td>East Timor</td>
<td>0.65</td>
<td>1</td>
<td>3.2</td>
<td>0.03</td>
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<tr>
<td><strong>NUSATENGGARA</strong></td>
<td><strong>9.97</strong></td>
<td><strong>8</strong></td>
<td><strong>74.23</strong></td>
<td><strong>0.69</strong></td>
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<tr>
<td>W.Kalimantan</td>
<td>2.99</td>
<td>2</td>
<td>12.4</td>
<td>0.12</td>
</tr>
<tr>
<td>C.Kalimantan</td>
<td>1.27</td>
<td>2</td>
<td>9.5</td>
<td>0.09</td>
</tr>
<tr>
<td>S.Kalimantan</td>
<td>2.46</td>
<td>4</td>
<td>34.2</td>
<td>0.32</td>
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<tr>
<td>E.Kalimantan</td>
<td>1.98</td>
<td>7</td>
<td>40.0</td>
<td>0.37</td>
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<tr>
<td><strong>KALIMANTAN</strong></td>
<td><strong>8.70</strong></td>
<td><strong>15</strong></td>
<td><strong>96.1</strong></td>
<td><strong>0.90</strong></td>
</tr>
<tr>
<td>N.Sulawesi</td>
<td>2.55</td>
<td>9</td>
<td>61.96</td>
<td>0.57</td>
</tr>
<tr>
<td>C.Sulawesi</td>
<td>1.78</td>
<td>5</td>
<td>17.1</td>
<td>0.16</td>
</tr>
<tr>
<td>S.Sulawesi</td>
<td>8.96</td>
<td>10</td>
<td>77.03</td>
<td>0.72</td>
</tr>
<tr>
<td>S.E.Sulawesi</td>
<td>1.22</td>
<td>1</td>
<td>6.0</td>
<td>0.05</td>
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<tr>
<td><strong>SULAWESI</strong></td>
<td><strong>12.51</strong></td>
<td><strong>25</strong></td>
<td><strong>162.09</strong></td>
<td><strong>1.50</strong></td>
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<tr>
<td>Maluku</td>
<td>1.79</td>
<td>3</td>
<td>13.0</td>
<td>0.12</td>
</tr>
<tr>
<td>Irian Jaya</td>
<td>1.46</td>
<td>3</td>
<td>12.37</td>
<td>0.11</td>
</tr>
<tr>
<td><strong>TOTAL:INDONESIA</strong></td>
<td><strong>178.64</strong></td>
<td><strong>263</strong></td>
<td><strong>10,783.1</strong></td>
<td><strong>100.00</strong></td>
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</table>

Sources: 1) Deppen RI, PPJ 1988-90
3) Biro Pusat Statistik (Central Bureau of Statistics)

Notes: Print media cover daily, weekly newspapers, and magazines.
**ANNEX**

**PROFILE OF 'BALI POST' DAILY**

<table>
<thead>
<tr>
<th>Place of publication</th>
<th>Denpasar, Bali</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date founded</td>
<td>1 August 1948</td>
</tr>
<tr>
<td>Population of city (1990)</td>
<td>400,000</td>
</tr>
<tr>
<td>Population of province</td>
<td>2.8 million</td>
</tr>
<tr>
<td>Founders</td>
<td>Mr K. Nadha</td>
</tr>
<tr>
<td>Capital Investment</td>
<td>PT Bali Post</td>
</tr>
<tr>
<td>Owners and Publishers</td>
<td>Jalan Kepundung 67A, Denpasar</td>
</tr>
<tr>
<td>Address</td>
<td>Bali</td>
</tr>
<tr>
<td></td>
<td>Jalan Kepundung 67A, Denpasar</td>
</tr>
<tr>
<td></td>
<td>Bali</td>
</tr>
<tr>
<td></td>
<td>Mr K. Nadha</td>
</tr>
<tr>
<td></td>
<td>27,500 copies</td>
</tr>
<tr>
<td>Circulation</td>
<td>Bali and Nusatenggara</td>
</tr>
<tr>
<td>Language</td>
<td>Bahasa Indonesia</td>
</tr>
<tr>
<td>Frequency</td>
<td>Daily (plus Sunday editions, and weekly rural edition)</td>
</tr>
<tr>
<td></td>
<td>12 pages</td>
</tr>
<tr>
<td>Number of pages</td>
<td>27,500 copies</td>
</tr>
<tr>
<td>Selling price per copy</td>
<td>Rp 300 (US$0.16)</td>
</tr>
<tr>
<td>Cost price per copy</td>
<td>Rp 240 (US$0.13)</td>
</tr>
<tr>
<td>Size of paper</td>
<td>Broadsheets, 9 columns</td>
</tr>
<tr>
<td>Advertising rate per mm/column</td>
<td>Rp 2,000 (US$1.09)</td>
</tr>
<tr>
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<td>156</td>
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<tr>
<td>1) Editorial</td>
<td>38</td>
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<td>2) Advertising</td>
<td>5</td>
</tr>
<tr>
<td>3) Circulation/Sales</td>
<td>13</td>
</tr>
<tr>
<td>4) Production</td>
<td>70</td>
</tr>
<tr>
<td>5) Administrative</td>
<td>30</td>
</tr>
<tr>
<td>Annual Gross Income:</td>
<td>Rp 1.7 billion (US$935,000)</td>
</tr>
<tr>
<td>1) National advertising</td>
<td>10.5%</td>
</tr>
<tr>
<td>2) Local Advertising</td>
<td></td>
</tr>
<tr>
<td>3) Government advertising</td>
<td>4.2%</td>
</tr>
<tr>
<td>4) Subscription</td>
<td></td>
</tr>
<tr>
<td>5) Street sales</td>
<td></td>
</tr>
<tr>
<td>6) Printing jobs</td>
<td></td>
</tr>
<tr>
<td>Annual Expenses:</td>
<td>Rp 1.3 billion (US$715,000)</td>
</tr>
<tr>
<td>1) Printing</td>
<td>43%</td>
</tr>
<tr>
<td>2) Salaries</td>
<td>37%</td>
</tr>
<tr>
<td>3) Marketing operation</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

*pcfile:balipost*
### PROFILE OF 'SURABAYA POST' DAILY

**Place of publication**
- Surabaya, East Java

**Date founded**
- 1 April 1953

**Population of city (1990)**
- 2.5 million

**Population of province**
- 32.1 million

**Founders**
- Mr Abdul Azis
- Mrs Toety Azis

**Capital Investment**
- PT Surabaya Post

**Owners and Publishers**
- Mrs Toety Azis

**Address**
- Jalan TAIS Nasution No.1
- Surabaya

**Editor**
- Mrs Toety Azis

**Circulation**
- 85,000 copies

**Area of circulation**
- East Java

**Language**
- Bahasa Indonesia

**Frequency**
- Daily (plus Sunday editions)

**Number of pages**
- 12 pages

**Selling price per copy**
- Rp 300 (US$0.16)

**Cost price per copy**
- Rp 240 (US$0.13)

**Size of paper**
- Broadsheets, 9 columns

**Size of staff:**
- 50

**Annual Gross Income:**
- na

1) National advertising
2) Local Advertising
3) Government advertising
4) Subscription
5) Street sales
6) Printing jobs

**Expenses:**
- na

1) Printing
2) Salaries
3) Others

* Ad income - Surindo Utama

**pcfile: sbayapost**
ANNEX

PROFILE OF 'HARIAN SURYA' DAILY

<table>
<thead>
<tr>
<th>Place of publication</th>
<th>Surabaya, East Java (Indonesia)</th>
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</thead>
<tbody>
<tr>
<td>Date founded</td>
<td>28 June 1986 (weekly)</td>
</tr>
<tr>
<td></td>
<td>January 1990 (daily)</td>
</tr>
<tr>
<td>Population of city (1990)</td>
<td>2.5 million</td>
</tr>
<tr>
<td>Population of province</td>
<td>33.1 million</td>
</tr>
<tr>
<td>Founders</td>
<td>Mr Ivans Harsono</td>
</tr>
<tr>
<td>Capital Investment</td>
<td></td>
</tr>
<tr>
<td>Owners and Publisher</td>
<td>PT Antar Surya Jaya</td>
</tr>
<tr>
<td>Address</td>
<td>Jalan Basuki Rachmat 93</td>
</tr>
<tr>
<td></td>
<td>Surabaya 60271</td>
</tr>
<tr>
<td>Editor</td>
<td>Mr Ivans Harsono</td>
</tr>
<tr>
<td>Circulation</td>
<td>50,000 copies</td>
</tr>
<tr>
<td>Area of circulation</td>
<td>Surabaya and East Java</td>
</tr>
<tr>
<td>Language</td>
<td>Bahasa Indonesia</td>
</tr>
<tr>
<td>Frequency</td>
<td>Daily (plus Sunday edition)</td>
</tr>
<tr>
<td>Number of pages</td>
<td>12 pages</td>
</tr>
<tr>
<td>Selling price per copy</td>
<td>Rp 300 (US$0.16)</td>
</tr>
<tr>
<td>Cost price per copy</td>
<td>Rp 185 (US$0.10)</td>
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<td>Size of circulation</td>
<td>Surabaya and East Java</td>
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<tr>
<td>Language</td>
<td>Bahasa Indonesia</td>
</tr>
<tr>
<td>Frequency</td>
<td>Daily (plus Sunday edition)</td>
</tr>
<tr>
<td>Number of pages</td>
<td>12 pages</td>
</tr>
<tr>
<td>Selling price per copy</td>
<td>Rp 300 (US$0.16)</td>
</tr>
<tr>
<td>Cost price per copy</td>
<td>Rp 185 (US$0.10)</td>
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<tr>
<td>Area of circulation</td>
<td>Surabaya and East Java</td>
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<tr>
<td>Frequency</td>
<td>Daily (plus Sunday edition)</td>
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<tr>
<td>Number of pages</td>
<td>12 pages</td>
</tr>
<tr>
<td>Selling price per copy</td>
<td>Rp 300 (US$0.16)</td>
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<tr>
<td>Cost price per copy</td>
<td>Rp 185 (US$0.10)</td>
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<td>2) Advertising</td>
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<td>4) Production</td>
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<tr>
<td>5) Administrative</td>
<td>90</td>
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<tr>
<td>Annual Gross Income:</td>
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<td>1) National advertising</td>
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<td>2) Local Advertising</td>
<td></td>
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<td>3) Government advertising</td>
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<td>4) Subscription</td>
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<tr>
<td>5) Street sales</td>
<td></td>
</tr>
<tr>
<td>6) Printing jobs</td>
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<tr>
<td>Expenses:</td>
<td>na</td>
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<tr>
<td>1) Printing</td>
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<tr>
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<td>3) Others</td>
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pcfile:surya
PROFILE OF 'WASPADA' DAILY

Place of publication: Medan, North Sumatra (Indonesia)
Date founded: January 11, 1947
Population of city (1990): 2 million
Population of province: 10.3 million
Founders:
Mr Mohammad Said
Mrs Hajjah Ani Idrus

Capital Investment:
PT Prakarsa Abadi Press

Owners and Publishers:
Jln Letjen Suprapto/Katamso
No.1, Medan
Mrs Hajjah Ani Idrus
80,000 copies

Address:
North Sumatra, West Sumatra, Aceh, Riau and Jakarta
Bahasa Indonesia

Editor:
Mrs Hajjah Ani Idrus

Circulation:
80,000 copies

Area of circulation:
North Sumatra, West Sumatra, Aceh, Riau and Jakarta

Language:
Bahasa Indonesia

Frequency:
Daily (plus Sunday editions)

Number of pages:
12 pages

Selling price per copy:
Rp 300 (US$0.16)

Cost price per copy:
Rp 281 (US$0.15)

Size of paper:
Broadsheets, 9 columns

Ads rate per mm/column:
Rp2,500 (US$1.37)

Size of staff:
260
1) Editorial: 78
2) Advertising: 6
3) Circulation/Sales: 20
4) Production: 81
5) Administrative: 75

Annual Gross Income:
Rp 4.5 billion (US$2.5 million)

1) National advertising: na
2) Local Advertising: na
3) Government advertising: na
4) Subscription: na
5) Street sales: na
6) Printing jobs: na

Annual Expenses (Costs):
Rp 3.9 billion (US$2.1 million)

1) Printing: na
2) Salaries: na
3) Others: na

cf: waspada