



RETHINKING MEDIA PLURALISM IN THE PLATFORM ERA TOWARD AN ASYMMETRICAL PLURALISM FRAMEWORK FOR COMPETITION BETWEEN GLOBAL AND LOCAL VIDEO-ON-DEMAND PLATFORMS IN INDONESIA

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Abstract: Over-the-top (OTT) video on demand (VOD) apps have quickly become popular. This has changed how media companies compete and shown where global and local services have been missing for a long time. This paper talks about the idea of "asymmetrical plurality" and looks at the Indonesian OTT-VOD market to show that structural unfairness and market variety can live together. For this qualitative case study, data were gathered from a lot of different places. There were also official company papers and reports, as well as semi-structured conversations with regulators, politicians, business leaders, and professors. The study shows that digital infrastructures, algorithms, data, and strategic partnerships are now the main things that make the broadcast industry competitive, not different stations competing with each other. There are more platforms than ever before, but global platforms are still better for money, tech, data, and connecting communities. In order to stay competitive, local platforms use cultural closeness, localizing material, and building relationships with institutions. Asymmetrical pluralism broadens liberal-pluralist political economics by demonstrating that the unequal distribution of competing resources mattered as much as different markets for media pluralism in the platform age.

Keywords: media pluralism; platformization; platform competition; political economy; Video-on-Demand; Indonesia.



1. Introduction

Introducing digital platforms has changed how media is made, shared, and watched, and has a big effect on the worldwide multimedia business. Streaming services have changed TV from a straight medium to a platform environment (Nieborg and Poell, 2018; Van Dijck et al., 2018). Nowadays, streaming services use algorithms, data analytics, cloud computing, subscription models, and data to tell you what to watch. A big part of the media industry now is OTT and VOD services. Additionally, they are altering how people get things. In addition, they change how media companies, internet companies, advertisers, and users talk to each other.

A big part of a competitive advantage is no longer the streaming infrastructure. It involves science knowledge, data management, program dominance, and integrating ecosystems. This is a minor example of platformisation in general. As Lotz (2017) states, the internet-distributed TV has enabled individuals to watch TV at their convenience. As explained by Lobato (2019), streaming platforms are worldwide distribution systems that revolutionize the way video content travels across boundaries. Winning in the streaming economy is as much about exploiting digital infrastructures, recommendation algorithms and platform ecosystems across a multitude of marketplaces as it is about the quality of content (Cunningham and Craig, 2021; Flew and Martin, 2022).

These shifts have stirred up the discussions over platform power and media pluralism. Liberal-pluralist political economists have argued for a long time that open markets and increased competition are beneficial for consumers because they provide diversity and innovation (Doyle, 2013; McQuail, 2010). This is underpinned by the rapid growth of over-the-top (OTT) video on demand (VOD) services, which have cut barriers to entry and improved user choice. “New research finds platform marketplaces combine openness and new types of concentration” Despite the proliferation of market players through digital platforms (Nieborg et al., 2023; Van Dijck et al., 2018; D. Winseck & Jin, 2011), the distribution of competitive resources such as technological infrastructures, data, artificial intelligence and algorithmic capabilities remains uneven among firms. A diversified platform may not lead to equal competitive opportunities.

When it comes to Indonesia, this dispute is very interesting to look into. The Southeast Asian country has become the region’s largest digital market, with internet access, smartphone use and digital media consumption all increasing rapidly. In early 2025, the number of Indonesian internet users watching online video content had exceeded 95%, while the overall population of internet users in the nation was more than 212 million, or 74.6% of the population (Datareportal.com, 2025). Indonesia’s quick expansion has already made it one of the most competitive over-the-top (OTT) and video-on-demand (VOD) markets in the region, with huge investment in streaming services.

What makes Indonesia different from other established streaming markets is the coexistence of local, regional and global platforms. At the same time, local providers such as Vidio, Vision+, MAXstream, KlikFilm, Bioskop Online, Genflix, and CubMu still have significant market share, even as international players like as Netflix and Disney+ battle with regional providers such as Viu and WeTV. As opposed to having a fully dominating global or local corporate market, Indonesia's competitive scene is a mix of local media companies and foreign tech companies that compete in the same digital environment but in different ways.



Living together creates a basic paradox. The skyrocketing growth of streaming services, on the other hand, fits with liberal-pluralists' hopes for more media variety and more customer control. Competition, on the other hand, depends on conditions that aren't exactly fair. Additionally, global platforms have more resources such as more subscribers, more money, better algorithms, more proprietary technology, larger content libraries, and more. Comparatively, domestic platforms compete based on cultural similarity, local content, sports broadcasting rights, and partnerships with telecoms and media conglomerates. So there are still a lot of platforms out there, but their competitive capacities are really different.

Many studies have addressed platformization, streaming TV, digital governance and the rise of over-the-top (OTT) video-on-demand services from diverse aspects. This includes work on the evolution of television (Lotz, 2017), the infrastructures of global streaming (Lobato, 2019), platform ecosystems (Nieborg et al, 2023; Van Dijck et al, 2018) and regulatory oversight. Other study has explored the method of localization in streaming services in poor nations. Surprisingly, however, we still know little about the co-existence of structural inequality and heterogeneous markets in the same platform environment. Very little study has been done on how global and local streaming services compete to change media plurality from the perspective of a liberal-pluralist political economy.

The knowledge gap: Asymmetrical Pluralism To understand the competitiveness between platforms in the emerging digital media markets, this essay proposes the concept of Asymmetrical Pluralism. The concept describes a situation where market players are unevenly distributed in terms of competitive resources (financial capital, technological capabilities, data ownership, algorithmic systems, ecosystem integration, etc), there are multiple providers actively competing and consumers benefit from meaningful diversity. Asymmetrical Pluralism holds that concentration and competition are not mutually exclusive, but co-exist in a single platform ecosystem.

This study uses a qualitative case study method of the sector to analyze the competition between global and local platforms in the Indonesian OTT-VOD market via the examination of documents and semi-structured interviews with industry executives, legislators, regulators, and academic experts. What does the relation between media pluralism and structural inequality in platform-based media industries say about the formation of Indonesia's streaming market by competition between global and local OTT-VOD platforms? It is the study subject which it tries to examine.

Three things we learned from this investigation. It starts by extending liberal-pluralist political economics by showing that diversity in markets does not always entail competitive equality. Secondly, the competition occurs across asymmetrical digital ecosystems, rather than between individual companies, which is a novel contribution to platform studies. Third, it contributes real knowledge from Indonesia to the dominated North American and European contexts in discussions on platformization comparability, thereby broadening the area.

2. Literature Review

2.1 Media Pluralism and Liberal Political Economy

Media pluralism has long been seen as a normative foundation of democratic discourse, since it assures the availability of people to a range of information, perspectives and media sources. Pluralism has typically been associated with ownership, content and public representation diversity



(McQuail and Deuze, 2020; Napoli, 2011). This is because it represents the belief that the operation of democratic societies requires a variety of independent actors who may create and disseminate knowledge. Thus, media policy, competitiveness and democratic governance conversations are now taking place within the framework of media pluralism (Karppinen, 2013).

Within the discipline of political economics of communication, there are two schools of thought on the significance of media plurality. Critical political economists argue that capitalist media markets are always prone to concentration. Big business accumulates ownership and influence, notwithstanding the seeming explosion of media sources. This idea is that structural inequality in income and ownership allows dominant corporations to shape media output and public discourse and that competition is not sufficient to provide diversity (Mosco, 2009). The state is seen to have to intervene to ensure free and fair discourse and prevent a monopoly in the marketplace.

Liberal pluralists, in contrast, consider competition as a desirable thing since it encourages diversity, efficiency and innovation. Doyle (2013) states that competitive media markets stimulate content diversity and customer choice as they compel firms to differentiate their offerings and adapt to the changing audience preferences. Similarly, McQuail & Deuze (2020) underline that the plurality of media organizations should be interpreted in terms of the variety of perspectives and cultural expressions, not only the number of media organizations. Here, viewers are considered as active agents who determine market outcomes, and the government is more a neutral arbiter of media production than a regulator per se.

At first appearance, these liberal-pluralist principles seemed to be supported by the rapid development of digital technology. The internet has democratized the production and delivery of media, enabling new companies to join the market without needing to invest in costly transmission infrastructure or compete for scarce broadcasting frequencies. With streaming services and digital platforms the number of media providers would be raised and necessarily boost pluralism and consumer welfare by way of more competition.

New study, however, argues that simple numbers are not enough to establish media plurality. Helberger (2020) demonstrates that algorithmic curation, personalization, and platform governance are increasingly impacting people's access to information. Karppinen (2013) asserts that pluralism is also contingent on the distribution of communicative power and institutional frameworks. Though platform mediated contexts present audiences with a vast universe of material choices, private algorithms and digital infrastructures are key factors in determining exposure and consumption.

The developments indicate that understanding media plurality in the platform era requires going beyond the simple fact of the existence of diverse market actors. Meanwhile, the proliferation of consumer choice in digital markets is accompanied by new forms of structural inequalities rooted in technological skill, data ownership, and platform governance. This article argues that the liberal-pluralist political economy should not be abandoned, but its foci of diversity and competition philosophically improved. To successfully study Indonesia's OTT-VOD industry and to define the concept of Asymmetrical Pluralism, a theoretical knowledge of co-existence of unequal competitive capability and market diversity is required.



2.2 Platformization and Structural Asymmetry

The development of digital platforms has changed the way modern media firms are formed. Platforms are not just new channels for content distribution, but increasingly institutional infrastructures that govern the production, distribution, monetization and consumption of media content (Van Dijck et al., 2018). Platformization reconfigures how firms compete and create value by introducing digital platform logics such as datafication, algorithmic curation, modularity and ecosystem governance into media production (Nieborg et al., 2023). Hence, competitiveness cannot be understood only by technological infrastructures, data resources, platform management and content development.

The biggest effect of these changes has been on streaming video and television. Internet-distributed television has replaced linear programming with individually tailored, on-demand watching experiences, which makes user engagement, subscriber retention, recommendation algorithms, and ecosystem integration more consequential than scheduling or advertising alone (Lotz, 2017). Similarly, Lobato (2019) argues that streaming services should be seen as global distribution infrastructures including transnational networks, content licensing, and technology. Content is still king in platform markets but it's simply one aspect of a much bigger competitive landscape.

This means that platformization has transformed the competitive environment from siloed media firms to broader, more interconnected digital ecosystems. To sustain and strengthen their market positions, streaming services are increasingly relying on partnerships with telecommunication providers, cloud vendors, device manufacturers, payment processors, and advertising technologies (Flew & Martin, 2022). As organizational abilities are vital for successful competition, so is the ability to arrange complementary participants within digital ecosystems. So, media companies are competing against each other in real time using data, technology, content and strategic alliances.

A major component of platform competition is the cumulative nature of competitive advantage. The behavioral data that digital platforms are continually collecting improves recommendation engines, user experiences, advertising and future investments. This self-reinforcing circle of more users producing more data and better algorithms attracting more users results in a stronger dominant platform (Srnicek, 2017). And then there are network effects. The more users, advertisers and complementary services that join the same ecosystem, the more valuable the platform becomes. Smaller competitors will find it more difficult to replicate established competitive advantages.

Algorithmic governance is another aspect contributing to structural inequality. Digital platforms are not only neutral intermediaries, but actively shape cultural exposure via their ranking and recommendation algorithms that govern what material is made discoverable (Gillespie, 2018). The algorithms that employ private datasets and ongoing machine learning provide dominant platforms a strategic edge over smaller enterprises. Data is a major competitive advantage since platforms that have data infrastructures are able to leverage it in their favor in various markets by maximizing content investment, audience targeting, and subscription strategies (Van Dijck et al., 2018).

These shifts point to platform markets characterized by rising diversity and persistent inequity. Digital technologies have made it easier for more people to enter markets and offer consumers more choices. But there remains a significant income gap regarding strategic resources including data ownership, global distribution networks, financial capital and artificial intelligence. So



knowing how many companies are in the market isn't enough to comprehend current platform competitiveness. Rather it is a reflection of naturally uneven environments, where different actors compete with differing capacities. This conflict may provide a basis for an examination of the competitive dynamics between local and global OTT-VOD platforms in Indonesia's emerging digital media ecosystem.

2.3 Competition Between Global and Local Platforms

The rise of streaming platforms, particularly in new digital markets, has intensified the competition between global platform businesses and local media providers. In platform rivalry, there are direct interactions between globally connected digital platforms and locally rooted media organizations, unlike the traditional international media competition, which was largely about the cross-border transmission of audiovisual content. Simultaneously, global and local platforms compete for subscribers, content rights, advertising revenue, technological innovation and audience engagement, despite very different structural restrictions.

Global streaming services have competitive advantages of huge capital, state-of-the-art IT infrastructures, global content libraries, and integrated digital ecosystems. Multinational firms may take advantage of large economies of scale and scope by investing in the production of original content, artificial intelligence, cloud computing, and platform development across millions of subscribers in multiple regions (Cunningham & Craig, 2021; Lobato, 2019). These inherent advantages allow international platforms to enter domestic markets with resources and experience that local competitors do not have.

While global platforms have expanded, local streaming services remain. Far from it: research is indicating that domestic platforms are keeping competitive using methods that are adaptable, not adversarial. One key advantage is cultural proximity, which helps local suppliers to better understand the language, values, tastes and preferences of the target audience and creative industries (Straubhaar, 2021). That offers them an advantage, enabling them to present content unique to their region, an area in which foreign platforms find it difficult to operate, even with a growing investment in local products.

Adaptation is about more than simply content. Local platforms strengthen their competitive position by forming strategic agreements with broadcasters, telecom operators, ISPs, payment systems and national advertising networks. Together they may cut client acquisition costs, broaden distribution channels, and integrate streaming services into bigger digital ecosystems in the home nation (Flew & Martin, 2022). As part of a diverse media conglomerate, domestic platforms may benefit from the company's existing content libraries, television networks, production companies, and audience links.

Given these features it would be wrong to interpret the competition between global and local platforms as a zero-sum game in which one would finally win over the other. In platform marketplaces the reverse is true: Participants cohabit, adapt and specialize strategically. At the local level, platforms compete with each other through cultural relevance, regional pricing tactics, sports broadcasting rights, and institutional relationships, compared to global level platforms which tend to have a stronger presence in terms of technology capabilities, global distribution and large content ecosystems. This kind of differentiation keeps many platforms financially solvent and also gives customers additional alternatives.



But to live together doesn't imply you are on equal footing. However, local platforms do not have the structural advantages of global companies in terms of capital, data ownership, AI, technological infrastructures, and ecosystem integration. This indicates that there is diversity of competitors in platform markets, and persistent inequality of capacity to compete. The co-existence of structural asymmetry and market plurality cannot be satisfactorily explained by existing theoretical frameworks since concentration and competition are seen as mutually exclusive consequences. Instead it needs a theoretical framework that can explain the reality that market players are not equal, while actively compete with one other.

2.4 Toward an Asymmetrical Pluralism Framework

This whole event shows that one idea is not enough to explain how competition works in the new platform-based media sector. Liberal-pluralist political economics, on the other hand, says that plurality can only last as long as there are free markets, individual freedom, and different types of media. Platform studies show that competition is moving from making content to digital infrastructures, controlling algorithms, and coordinating ecosystems. A study of critical political economy also shows how platform capitalism uses network effects, economies of scale, and to gather data. All of the points of view are interesting, but none of them really explain how fundamental inequality and different markets can cohabit in a market where competition is strong.

This limitation stands out in the new digital markets where big platform companies and small media companies compete in the same area, even though their technical and financial skills are very different. Most people think that competition and concentration are opposites. Critical political economics sees concentration as a sign of less variety, while liberal-pluralist ideas see more rivals as a sign of more diversity. At first glance, they don't seem to work together, but new developments in platform areas point in the opposite direction. Some big players are getting more and more strategic resources, there is a lot of competition in the market, and there are a lot of options for customers. These are all things that can happen at the same time in platform markets.

In this way, our study suggests that the old split between concentration and competition oversimplifies the variety of media in this platform-based era. With so many platforms to choose from, this doesn't mean that everyone has an equal chance to win. There may be more services and content for consumers to choose from, but the resources needed to make it happen are not spread out evenly. These include money, private data, AI, technology infrastructures, algorithmic systems, and connecting to the global ecosystem. So, to sum up, when judging pluralism, you should look at both diversity and the structural factors that affect how competitive market competitors are.

This essay presents the idea of asymmetrical pluralism, which is based on these thoughts. The idea is built on a made-up market where media companies compete fairly, customers can choose from many products and services, there aren't many barriers to entry, and different players in the market have different amounts of access to tools that help them fight. Asymmetrical Pluralism sees platform-based media markets as having a lot of different kinds of people and different levels of power, not as situations that can't work together. So, the focus shifts from the sheer number of competitors to the unequal distribution of strategic resources, which determines how well competitors do in the end.

The framework adds to what is known about platform power by shifting the focus from the dominance of single firms to the relational nature of competition. It's not trying to answer the



question of whether global platforms only control country markets. Instead, it looks at how competition works when there are both local and global platforms at the same time, even when there are persistent imbalances. Many global companies have huge problems with their finances, technology, and international systems. This method shows how resilient and creative local platforms can be in the face of these problems. Their ability to stay in business for a long time is due less to a basic imbalance in the market and more to flexible strategies that have been honed in competitive settings where structural inequality is common.

Asymmetrical pluralism may help us understand political economy from a liberal-pluralist point of view, platform studies, and the current digital political economy better. It uses ideas from critical political economics and platform studies, but it stays true to the liberal-pluralist idea that competition and customer choice are important parts of media pluralism. The sections that follow will look into Indonesia's OTT-VOD ecosystem. This summary gives a more thorough plan for figuring out how competitive platform areas are.

Figure 1. Conceptual Framework Asymmetrical Pluralism in the Platform Era

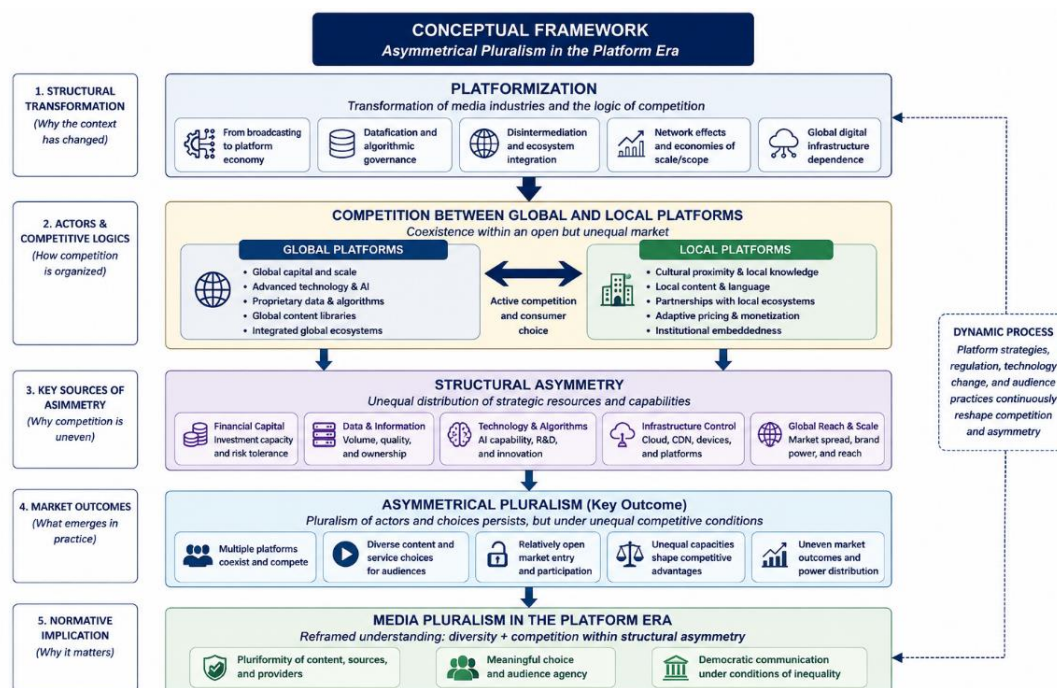


Figure 1. Conceptual Framework: Asymmetrical Pluralism in the Platform Era

3. Method

This research employs a qualitative case study to analyze the rivalry dynamics between Indonesian and foreign Video-on-Demand (VOD) platforms and to conceptualize Asymmetrical Pluralism in the wider context of platform-based media businesses. For a full assessment of contemporary events in their real surroundings, where the distinctions between industrial structures, regulatory frameworks, technology innovations and market competitiveness are unclear, a qualitative case study is the way to go (Yin, 2018). Indonesia is one of the fastest growing digital media markets in Southeast Asia and, in theory, a relevant example with local platforms as well as regional and global streaming firms. This research does not adopt a statistics method but an analytical generalization approach. It uses the case of Indonesia to theoretically comprehend media pluralism and platform competition in emerging digital economies more broadly.



Between 2024 and 2025, we collected empirical data via semi-structured interviews with key actors in Indonesia's video-on-demand (VOD) ecosystem. This comprised executives from streaming platforms and telecommunications companies, industry organizations, government officials, regulators, and media and communication policy specialists from university institutions. All interviews were in Bahasa Indonesia. In this work, the author has translated the citations to English for the purpose of clarity and readability, without changing their original meaning.

Documentary materials were utilized to augment the interview data and enhance contextual understanding for triangulation purposes. Documentary sources included government regulations, policy documents, industry reports, market assessments, company publications and relevant academic literature. This investigation draws on primary and secondary sources to examine the interactions among market actors, regulatory institutions, and technical infrastructures that shape platform competition.

The data were analysed by a theme analysis using the interactive model proposed by Miles et al. (2014). This model includes the interactive methods of data reduction, data coding, data display and drawing conclusion. This study on the streaming business in Indonesia has examined three interrelated trends: (1) the structural advantages of global platforms, (2) adaptive competitive tactics of local platforms, and (3) the sector's various marketplaces and structural inequity. To increase the dependability of the results, data triangulation was employed throughout the research, by systematically cross checking the interview results with documentary evidence. As opposed to a descriptive technique, the study employed an abductive one, comparing and contrasting real-world data with current theoretical frameworks on platformization, political economics and media pluralism. This has led to Asymmetrical Pluralism, a theoretical framework to analyze the competition between global and local platforms in the platform age.

The conceptual framework illustrated in Figure 1 was not a formal analytic model but rather a sensitizing framework to guide the study. Such a framework enabled a deeper understanding of the relationship between platformization, competitive strategies, structural asymmetry and media pluralism, and allowed for the formation of evidence-based conceptual refinement.

4. Findings

4.1 Platformization Reshapes the Competitive Landscape

According to the results, platformization has completely changed the way the audiovisual business in Indonesia is competitive. Online video on demand (OTT) services have changed the rules of competition, rather than just adding another distribution channel. Creating a unified watching experience that incorporates content, technology, audience participation, and digital ecosystems is becoming more important than broadcasting schedules, television ratings, or advertising income in determining competition. Platformization was defined as a structural shift in the media sector rather than just a technical breakthrough throughout interviews with business leaders, regulators, and academics.

Streaming services, according to industry insiders, are competing not by displacing television but by expanding viewers' access to material outside traditional broadcasting. The platform was deliberately designed to integrate live television with on-demand viewing, according to Vidio's Deputy CEO and Chairman of the Indonesian Video Streaming Association (AVISI). This allows



viewers to consume content in different contexts of everyday life, rather than only in front of television screens. In his explanation:

We provide live TV as well as a large collection of on-demand video all on one platform. Although people may watch live broadcasts on television, Vidio is more often used when people are traveling or not at home. (Vidio Interview, 2025) We want our material to be available whenever and wherever our audience needs it.

This statement focuses on how platformization changes the way audiences connect with audiovisual material by increasing the variety of when, where, and how they watch it, rather than suggesting that streaming is a replacement for television. So, the focus now is on ensuring constant accessibility across all devices and watching contexts rather than drawing in viewers at set airing periods.

In addition, the interview data shows that differentiating platform tactics is becoming more important in platform competitiveness than just boosting content libraries. Having strong technical skills isn't enough, according to informants, unless you also have a good grasp of the tastes of your local audience. The informant states:

The extraordinary success of Indonesian content makes the country's market stand out. Streaming sports, Indonesian dramas, and unique content from our platform continue to be our strong suits. Instead of blindly following worldwide platforms, we tailor our techniques to the specific habits of Indonesian audiences. (Interview with Silvio, 2025).

This discovery implies that platformization has changed the way competition is conducted. Instead of focusing on content, it is now about platforms. In this approach, technical skills, user experience, unique content, and audience information are integrated to provide a competitive advantage. Streaming services are shifting their focus from focusing on program quantity to focusing on creating unique platform ecosystems that include sports, original content, entertainment, and tailored services.

Similarly, academics who took part in the discussion stressed how the proliferation of streaming services has altered dynamics in the whole audiovisual ecosystem. According to a 2025 interview with media experts, platformization is pushing television networks, telecoms, content creators, and digital service providers to restructure their operations around hybrid distribution methods rather than displacing traditional broadcasting. Rather than existing as independent media services, streaming platforms in this sense serve as institutional nodes that link several sectors. Because of this, the lines between content creation, digital technology, telecommunications, and broadcasting have grown more blurry.

One thing that came out of all the interviews was that the capacity to coordinate various strategic resources inside platform ecosystems is now more important than owning broadcasting infrastructure when it comes to competitiveness in Indonesia's OTT-VOD business. Accessibility to audiences, technical advancement, locally relevant content, ecosystem collaborations, and ongoing user interaction make up the new competitive landscape. These results show that the competitive environment of Indonesia's audiovisual sector has been completely changed by platformization. They do, however, show that not all platforms are equally equipped to compete in this new environment. Consequently, this part delves into the topic of how, although sharing an



identical market, global and local streaming platforms have developed differential competitive skills.

4.2 Unequal Competitive Capacities Between Global and Local Platforms

Despite sharing the same Indonesian market, the results show that local and global OTT-VOD services face quite distinct competitive environments. According to interviewees, platforms' ability to compete depends on the uneven distribution of strategic resources, not the sheer quantity of market players. Capital, infrastructure, algorithms, content investment capacity, distribution networks, audience data, and international reach are all examples of such resources. As a result, there are a lot of players in the Indonesian streaming industry, but their competitive abilities are still quite uneven.

Global streaming firms have structural advantages due to their multinational operations, as industry leaders have pointed out time and time again. Constant advancements in recommendation systems, user interfaces, cloud infrastructures, and unique content creation are made possible by their capacity to disperse technology expenditures across several nations. According to an expert in the field:

"The scale at which global platforms function is quite different. They are able to invest in quality content, enhance the user experience, and develop technology consistently since their investments are spread out over several regions. There is no way that amount of investment can be matched by local platforms (Vidio Interview, 2025).

Instead of focusing just on financial resources, this phrase highlights how technical and organizational skills gained via global platform ecosystems are becoming a more significant source of competitive advantage. Thus, the benefits experienced by multinational platforms include not just the infrastructures that underpin platform operations but also the goods themselves.

Another important driver of competitive disparity, according to interview evidence, is access to private data and technical innovation. Sources said that worldwide marketplaces employ massive amounts of user data to constantly fine-tune recommendation algorithms. With this information, we can make better investment choices, personalize content more precisely, and hold on to our audiences for longer. While domestic platforms have a wealth of information about their consumers, they often struggle to build recommendation systems that can compete due to limited datasets and a lack of technical resources.

Platform rivalry, according to academics, should not be understood by looking at easily measurable market indicators like subscriber counts or content catalogs. A more accurate description would be that competitiveness is becoming more dependent on the uneven distribution of intangible strategic assets like data analytics, software engineering skills, cloud computing infrastructures, and artificial intelligence capabilities. As pointed out by one of the academics:

Because there are so many platforms, competition seems to be low-hanging fruit. Having said that, their technical capacities vary. Their competitiveness is drastically different due to variations in access to digital infrastructures, data, algorithms, and artificial intelligence (Media Experts Interview, 2025).



This finding provides further evidence that disparities in investment capital and access to technology resources, both of which have an impact on platform performance, are the root causes of uneven competitive capacity.

The growth of streaming services has increased competition in the industry and brought new problems to governance, according to government and regulatory officials. Current regulatory frameworks do not discriminate against any specific businesses but rather impose uniform legal requirements on local and international suppliers. Although market actors bring different economic and technological resources to the regulatory environment, some participants noted that regulatory equality does not always lead to equal competitive capacity (DPR Interview, 2025; KPI Interview, 2025; LSF Interview, 2025). Therefore, there may be structural inequalities in the market that remain even when there is equal legal treatment.

One thing that came out from all the different stakeholder groups was that the VOD business in Indonesia is quite competitive, with equal market participation but uneven competitive capability. Although they are both governed by similar frameworks and operate in the same markets, global and local platforms couldn't be more different in terms of funding, technical prowess, algorithmic sophistication, worldwide experience, and ecosystem integration. This research disproves the long-held belief that more market freedom automatically leads to more equitable competition in Indonesia's streaming industry. Actors actively engage despite having significantly varied capacity to compete as competition occurs inside a fundamentally unfair environment.

Contrary to popular belief, local platforms may nonetheless survive and even thrive in the face of uneven competitive capacity. Even though domestic platforms have structural obstacles, interviewees consistently indicated numerous adaptation techniques that help them stay competitive.

Table 1. Sources of Competitive Capacity in Indonesia's VOD Industry

Competitive Resource	Global Platforms	Local Platforms
Financial capital	Very High	Moderate
Global content library	Extensive	Limited
AI and recommendation systems	Advanced	Developing
User data scale	Global	Domestic
Technology infrastructure	Global ecosystem	National ecosystem
Local audience knowledge	Moderate	Strong
Cultural proximity	Moderate	Very High
Sports broadcasting rights	Selective	Strong
Partnerships with telecom operators	Growing	Extensive



4.3 Adaptive Competitive Strategies of Local Platforms

The findings indicate that local OTT-VOD providers have not reacted with direct imitation or head-to-head competition despite the enormous structural advantages of global streaming platforms. Local platforms, however, have altered their competitive strategies to use the advantages already built into Indonesia's media ecosystem. Interviewees were also keen to point out that local platforms try not to compete on technological scale, global content libraries or financial investment. Rather, their individual approaches focused on the creation of local content, cultural proximity, strategic partnership and institutional linkage with the national media industry.

One of the biggest benefits domestic platforms tout over their rivals is their ability to understand the preferences of local viewers. Indonesian viewers have distinct consuming tendencies, unlike many global markets, executives in the area have remarked. Thus, local stations choose to broadcast in the Indonesian language, local programmes, sports events and entertainment genres that are culturally acceptable. The Deputy CEO of Vidio said:

"We don't copy global platforms to be competitive. " The main issue is what matters most to Indonesian viewers. Our major competitive advantages are still in locally made content, Indonesian drama series and local sports since they are local preferences of entertainment (Vidio Interview, 2025).

This study points up the importance of cultural proximity as a competitive resource in Indonesia's streaming sector. Instead of offering globally consistent content libraries, local platforms differentiate themselves by producing content that addresses national identities, languages and everyday cultural experiences. When seen this way, local content is not just a programming choice, but a strategic instrument to increase platform loyalty and audience engagement.

Interviews also suggest that local platforms are competing less on platform expansion and more on ecosystem integration. According to reports, many of Indonesia's streaming services are owned by bigger media or telecom conglomerates, giving them control over digital payment systems, advertising networks, content development, Internet access and broadcasting services. Smaller platforms might partner with bigger firms to reduce their costs of acquiring new clients and to extend their reach in the market by making greater use of the resources they already possess.

A such example is partnerships between streaming services and telecom carriers. Local providers are shifting away from conventional subscriptions, often bundling streaming services with mobile data plans, internet subscriptions and other digital services. Industry insiders believe the alliances make things more user-friendly and appeal to budget-conscious clients. In Indonesia, people don't usually acquire streaming subscriptions on their own. That's why bundling has been a really effective tactic. Mobile data and internet subscriptions, for example, provide a means for telecom businesses to access streaming services.

The data also suggest that unique material acquisition is an important adaptive strategy. Domestic players are focusing on content areas that have strong local demand, rather than striving to be a "one stop shop" and compete with global platforms in every category. In a lot of the interviews, the national football leagues, Indonesian entertainment shows, and locally produced original series were identified as strategic assets that provide the market a competitive edge. Global streaming companies have access to huge libraries of material globally, while smaller companies might succeed with their investments in niche audience segments.



Interestingly, the respondents did not think that the differences in competitiveness had disappeared since the adaptive actions were in place. In fact, they acknowledged that local platforms still face much stricter financial and technological limitations than their international peers. Local suppliers gain competitive advantage in the home market by the use of institutional knowledge, cultural familiarity, current media assets, and collaborative partnerships instead of attempting to copy global business models.

All the interviews have a similar thread: local platforms compete by adapting to systemic imbalances, not by overcoming them. It is not scale, but differentiation. It is not technological supremacy, but ecological collaboration. It is not global standardization, but cultural embeddedness. These are the origins of their competitive advantage. The local streaming services in Indonesia remain as significant players in the over-the-top (OTT) video on demand (VOD) industry despite generally unequal structural conditions, due to their adaptable strategies. But the data also suggest that the wider structural imbalances that affect platform competition remain even after these changes have been made. Instead, they depict a market with distinct breeds of rivals co-existing with persistent power asymmetries. The next section explores further about this problem of structural imbalance in Indonesia's video-on-demand business.

Table 2. Adaptive Competitive Strategies of Local VOD Platforms

Adaptive Strategy	Empirical Evidence	Competitive Purpose
Local original productions	Indonesian dramas and original series	Cultural differentiation
Sports broadcasting rights	Liga 1 and domestic sports	Audience retention
Cultural proximity	Indonesian-language content	Strengthening local relevance
Bundling with telecom operators	Mobile and broadband packages	Expanding accessibility
Media conglomerate integration	TV, news, and production assets	Resource sharing and cross-promotion
Flexible monetization	Subscription and advertising combinations	Reaching diverse consumer segments

4.4 Structural Asymmetry in Indonesia's OTT-VOD Market

The above data demonstrate that competition in Indonesia's OTT-VOD business is characterized by a sustained trend of structural imbalance. Platformization has opened up the market participation and increased competitiveness. Yet, interview data constantly show that market participants do not compete on an equal basis. Unequal competitive capabilities are not the result of individual inequalities between enterprises but a more general structural aspect of the Indonesian platform ecosystem. This asymmetry is ingrained in the asymmetrical distribution of strategic resources, technical capabilities, institutional networks and market influence shaping the competitive environment.



Five interconnected characteristics of structural asymmetry repeatedly surfaced from interviews with industry executives, regulators and academic specialists. First, there are major differences in financial capabilities. As these expenses are shared across worldwide subscriber bases, global streaming companies may support long term investments in original programming, software engineering, artificial intelligence and international scaling. Conversely, domestic platforms are operating in far more constrained financial conditions and so have to be much more selective in their investment plans.

Second, technical competence is another key cause of disparity. Informants constantly stressed that recommendation algorithms, cloud infrastructures, data analytics and platform engineering have become strategic resources that increasingly define competitive performance. Local platforms are also still building their technology capabilities and, in general, do not have the magnitude of technological investment accessible to international streaming firms. One academic participant put it this way:

“Platform competition today is not content-driven anymore. It is more and more about technology competence, algorithms, artificial intelligence and data. These are resources that the global platforms have on a much bigger scale” (Media Experts Interview, 2025)

Third, interview participants recognized data ownership as a strategic resource that reproduces competitive inequality. Global platforms constantly collect data from millions of users in a variety of national marketplaces, which enable more complex recommendation algorithms, audience segmentation and investment choices. Domestic platforms also generate valuable user data, but on much smaller operational scales. Therefore, disparities in data availability immediately translate into variances in platform performance and innovation capability.

Fourth, integration with ecosystems became another key factor of asymmetry. Global platforms profit from globally linked digital ecosystems that combine content creation with cloud computing, software development, digital payment systems and technical innovation. Local platforms, in contrast, mostly rely on national institutional networks that include broadcasters, telecommunication operators, content producers and local creative industries. These local ecosystems provide major economic advantages, but do not remove wider inequities in access to global technical infrastructures.

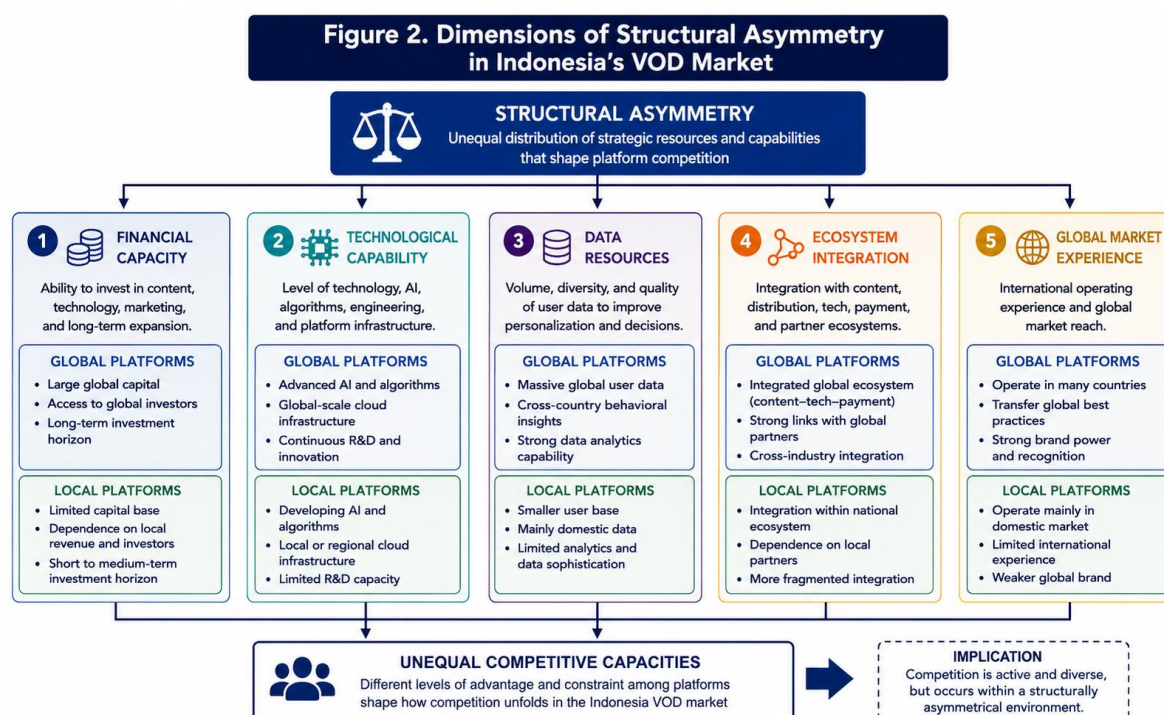
Finally, the panelists consistently noted gaps in market reach and international experience. Global streaming firms have operated in dozens of countries, and they bring to Indonesia the ability to apply managerial skills, technology breakthroughs and successful business models from one market to another. Homegrown platforms do have a better grasp of the Indonesian audience but they tend to grow inside one national market and hence have more geographically limited expertise.

Crucially, these structural inequalities do not prohibit competition from taking place. Interviewees often contested the notion that Indonesia’s streaming industry is monopolistic or limited to new competitors. Instead, they highlighted that domestic platforms keep innovating, gaining subscribers, funding unique content and fiercely competing for viewers’ attention. Consumers too are benefiting from a growing array of streaming services with varied content portfolios, price methods and watching experiences. In other words, the market rivalry is still going on, despite ongoing inequities in the competitive ability.



The primary empirical pattern that emerges from the analysis is this mix of active rivalry and structural inequality. The results show that instead of balanced market competition or market concentration so high, the Indonesian OTT-VOD industry has a more complex competitive structure with many actors as active participants with very different strategic resources. Structural asymmetry is therefore a permanent feature of platform competition and not a momentary market imbalance.

Figure 2. Dimension of Structural Asymmetry in Indonesia's VOD Market



4.5 The Emergence of Asymmetrical Pluralism

The synthesis of empirical evidence shows that the OTT-VOD business in Indonesia cannot be explained in terms of the traditional understandings of competitive pluralism or market concentration. On the other hand, the market demonstrates many of the traits often associated with media plurality. There are diverse platforms competing for audiences and consumers, globally and locally. Technology is innovating. New business models are being created through partnerships between streaming providers, broadcasters, telecommunications and digital service providers. Consumers are gaining access to a growing array of content and subscription options. These factors show that the Indonesian streaming business is still lively, open and competitively engaged.

The results, however, repeatedly show that this variety of market participants does not translate into equality of competitive opportunity. The interviewees consistently stressed that global and local platforms are fundamentally different in their capacity to invest, innovate, create technology, use data and scale their market reach. Structural disparities in financial resources, technical capabilities, algorithmic systems, ecosystem integration and foreign experience continue to impact the competitive dynamics of the market. As a result, there are multiple platforms, but they don't compete from the same structural positions.



Crucially, interviewees did not see these disparities as proof of the irrelevance of homegrown platforms. Rather, local platforms still have important roles with unique competitive strategies including cultural closeness, local content generation, strategic alliance, sports broadcasting rights, and integration within the national media ecosystem of Indonesia. These adaptive reactions allow local platforms to compete effectively in certain market niches while operating under somewhat more restrictive structural settings.

Taken together these data indicate a unique pattern of platform competition. The Indonesian OTT-VOD industry is neither a completely competitive market nor a concentrated monopolistic market controlled by one platform. Instead it is a market where variety of players, robust rivalry, consumer choice and persisting structural injustices co-exist together. This setup is not completely explained in the traditional assumptions that the larger numbers of market players must lead to more competitive circumstances.

Based on these empirical regularities, we propose the idea of Asymmetrical Pluralism. The concept refers to a situation in which several platforms compete in a free market and consumers benefit from a real diversity of content and services. The strategic resources needed to compete, including capital, technology, data, algorithms, infrastructures, and ecosystem integration, are still distributed unevenly among market actors. In these situations, rivalry is real, not symbolic, and chances for competitiveness are fundamentally varied. Pluralism is therefore not the result of equal capabilities of all rivals, but the continued active participation of varied players within the framework of enduring inequities in competitive resources.

The rise of Asymmetrical Pluralism also shows that the diversity of the market should not be judged just in terms of the number of competing platforms that exist or of the diversity of material that is accessible. Equally essential is understanding how variations in technical capabilities, financial resources, data ownership, and ecosystem location determine the ability of particular platforms to maintain competition over time. Hence, market openness and structural inequality are not opposing factors in the OTT-VOD business of Indonesia but mutually essential features of the current platform economy.

5. Discussion

This study's results suggest a rethinking of one of the core assumptions of liberal-pluralist political economics. That is, that growth of market competition would inevitably lead to growth of media plurality. Liberal-pluralist literature has argued for decades that the variety of democratic communication systems is caused by the plurality of media organizations, free market competition, and consumer choice (Doyle, 2013; McQuail, 2010). This view developed mostly within the framework of the broadcasting industries, where competition was widely characterized in terms of ownership variety, market entrance and audience choice. Nonetheless, the empirical results of this research indicate that these assumptions need to be revisited when considering platform-based media enterprises.

The OTT-VOD sector in Indonesia is an example of a market that has surely become more competitive. Now consumers may enjoy a variety of worldwide and local streaming services such as Netflix, Disney+, Vidio, Vision+, WeTV, Viu, KlikFilm and many more providers. The fast-growing streaming platforms have improved consumer choice, enriched audiovisual content and spurred innovation throughout the media industry. From a standard liberal-pluralist perspective,



these events may well be taken as indicators of more media diversity. But the empirical evidence shows that this view is only partly correct. Provider variety has grown dramatically, yet the competitive capability of the providers remains grossly uneven. Thus, the sheer number of competitors is inadequate to account for the nature of rivalry in today's platform marketplaces.

This conclusion supports previous calls to assess media pluralism not just in terms of the number of market players or the variety of material provided (Karppinen, 2013; Napoli, 2011). Rather, pluralism has to be understood also in reference to the structural circumstances under which market participants compete. The Indonesian example shows that multi-platform coexistence does not automatically lead to equal competitive chances, as access to strategic resources such as financial capital, proprietary data, algorithmic systems, artificial intelligence, cloud infrastructures and global distribution networks is still highly unequal. Therefore, platform variety should be seen as one dimension of media pluralism, whilst the distribution of competitive capacities is another equally essential feature.

These results contribute to present studies on platformization. Previous studies have shown how digital platforms are reshaping media sectors by integrating cultural production inside platform ecosystems of datafication, algorithmic governance and ecosystem integration (Nieborg et al., 2023; Van Dijck et al., 2018). The Indonesian instance offers an actual ground for these ideas, but also shows that platformization changes not just production and distribution of media, but the fundamental character of competition. The competition is no longer about content creation or broadcast scheduling. Rather, it is more and more reliant on the orchestration of technology infrastructures, recommendation algorithms, audience data, strategic alliances, payment systems and integrated platform ecosystems. In this sense, digital infrastructures are becoming an increasingly important site of competitive advantage over individual media items.

The results further indicate that platform competition should not be seen as a fight between distinct enterprises, but as a struggle between ecosystems in an unequal position. Integrated worldwide infrastructures that combine cloud computing, software engineering, artificial intelligence, proprietary algorithms, global subscriber bases and large financial resources give the global streaming giants the advantage. Local platforms, in contrast, compete via institutionally anchored methods that draw on cultural closeness, local content development, telecommunications alliances, sports broadcasting rights and knowledge of national audience preferences. Crucially, neither approach is intrinsically better. They are instead the expression of various competing logics in uneven structural settings. The research adds to the platform studies literature by highlighting the relational and ecosystem-based nature of platform competitiveness instead of the firm-based nature.

At the same time, the Indonesian experience complicates deterministic readings of platform capitalism that presuppose the eventual dominance of global technology giants. Multinational platforms may enjoy considerable structural benefits, but empirical research indicates that local providers nonetheless play an important role in Indonesia's digital media ecosystem. Their resilience is not based on similar financial or technical resources but rather on adaptive methods that draw on institutional embeddedness and cultural distinctiveness. This finding challenges (Lobato, 2019) that streaming marketplaces develop unevenly across various national contexts and Straubhaar's (2021) idea of cultural closeness, which accounts for the persistence of the value of culturally recognizable material for consumers, despite the increased power of globalization. The



Indonesian situation therefore demonstrates that structural asymmetry does not abolish local competition but changes the nature of local firms' competitiveness.

Perhaps the most important contribution of this work is its engagement with liberal pluralist political economics. The results show that the core tenets of the liberal-pluralist tradition are still useful but need to be theoretically extended rather than rejected. The liberal-pluralist academics are right to say that market openness, consumer choice and competition continue to be the bedrock of democratic media systems. In fact, the OTT-VOD business in Indonesia is a good example that more streaming platforms have improved audience choice and also spurred innovation. But empirical data also reveals that market openness alone cannot provide equality of competitive opportunity. Competition in platform marketplaces takes place under structural circumstances set by technical infrastructures, data ownership, algorithmic capabilities and ecosystem integration. These characteristics have been comparably little studied in traditional liberal-pluralist political economics as they have evolved since the shift from broadcasting to platform-based communication systems.

The results therefore support Winseck's claim that communication businesses nowadays are typically characterized by simultaneous forces of rivalry and consolidation (D. Winseck & Jin, 2011; D. R. Winseck, 2016). Competition and concentration are not anymore mutually exclusive circumstances, but increasingly co-exist in platform economies. This is exactly what we are seeing in the OTT-VOD sector in Indonesia. Competition is still fierce, customers have streaming choices, and local companies are becoming innovative. At the same time, however, global platforms still have disproportionate benefits from better technology, more money and a worldwide infrastructure. The presence of both criteria together implies that platform markets should not be analyzed via a binary dichotomy between competitive variety and market concentration. Rather, they should be seen as hybrid competitive ecosystems that are at once pluralistic and structurally unequal.

Drawing on these empirical and theoretical discoveries, this paper offers the notion of Asymmetrical Pluralism as a framework for understanding media rivalry in the platform age. Asymmetrical Pluralism is a market arrangement that is characterized by active competition among different players and by the existence of a substantial variety of services and content for customers, but competitive capabilities are structurally unequal because of an unequal distribution of access to strategic resources. The approach offered here differs from traditional conceptualizations of media plurality by taking into account the co-existence of diversity and inequity. Rather, they are complimentary features of platform markets, where competition endures in the face of persistent imbalances in capital, technology, algorithms, data, and ecosystem integration.

The notion also feeds into contemporary disputes over media pluralism, by moving analytical focus from results to competitive processes. Traditional ways of quantifying pluralism often include variety of ownership, number of media channels or diversity of content. Such indicators continue to be relevant, but the results provided here imply that future evaluations should also take into account the structural resources that enable enterprises to compete successfully. Markets might look numerically pluralistic but they also tend to reproduce large disparities in technical competence and strategic power. Thus, the assessment of media pluralism needs attention not just to the number of parties involved, but also to the structure of competition.



Finally, the Indonesian instance should not be seen as a country-specific phenomena. Emerging digital economies such as India, Brazil, Mexico, South Africa, and several Southeast Asian countries share similar features: fast-growing digital markets, growing participation of global streaming companies, strong domestic media industries, and uneven technological capacities. Therefore, Indonesia provides as a theory-building instance that may be used to produce more general conceptual insights on platform competition and media pluralism. More comparison work is needed to assess the broader relevance of Asymmetrical Pluralism, but this study gives a beginning framework to comprehend the co-existence of competition, variety and structural inequality in modern platform ecosystems.

6. Conclusion

The study examined the rivalry between global and local OTT-VOD platforms in reshaping media pluralism in Indonesia's platform-based media business. The results show that while Indonesia's streaming market has increased consumer choice and the diversity of platforms, the competition takes place within structurally unequal conditions marked by differences in financial resources, technological capabilities, data ownership, algorithmic systems, and ecosystem integration. The results show that media pluralism in the platform age cannot be defined just by the number of rivals or the variety of content, but should also include the uneven distribution of competitive resources.

To understand this arrangement, the paper offers the notion of Asymmetrical Pluralism, a conceptual framework that describes platform marketplaces where variety, active competition and consumer choice live side by side with lasting structural inequities. Drawing on liberal-pluralist political economics, the framework shows that competition and concentration are not mutually incompatible but rather complimentary features of platform ecosystems. It also adds to the field of platform studies by focusing on competition between digital ecosystems with unequal positions, not competition between individual enterprises.

The results have substantial policy consequences . More market players do not imply more meaningful media plurality. Policymakers should also tackle structural factors that define competition, including access to digital infrastructures, data governance, interoperability, local content creation, and support for domestic platform innovation. These policies are especially critical for rising digital economies that want to boost domestic competitiveness, but still maintain innovation and customer choice.

The research is confined to the OTT-VOD business in Indonesia and has not been tested in other national settings and platform sectors. Future study should explore the relevance of Asymmetrical Pluralism in diverse regulatory contexts and across multiple platform sectors, such as social media, content created by users, and music streaming. Comparative research would help to further improve the framework, and to enhance the knowledge of how media pluralism develops in more platformized communication systems.

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