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Gameconomics from Policy Dynamics Analysis Perspective (Study Case: Esports Policy in Indonesia)

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Abstract: This study analyses the policy dynamics of esports in Indonesia and its economic potential within the context of the digital economy. Using a qualitative descriptive approach, the research explores the transformation of esports policies from unrecognised to becoming a professional sports branch, including the impact of revising Law No. 3 of 2005 into Law No. 11 of 2022. The findings indicate that esports has significant economic potential, with Indonesia's gaming industry's revenue reaching USD 1.1 billion in 2023. However, challenges such as the lack of comprehensive regulations, the dominance of foreign companies, and infrastructure limitations still need to be addressed. This study recommends inclusive policies to support local developers, strengthen the ecosystem, and utilize esports as a key driver of Indonesia's digital economy.

Keywords: Gameeconomic, ESports, Policy Dynamics, Economic Potential.

INTRODUCTION

Dynamics analysis in public policy studies is a concept and theory used to understand longitudinal processes and data on policy developments (Kay, 2006). Policy dynamics is a process and temporal dimension where problems are solved, decisions are made, and interactions between individual actors and institutions occur (Daugbjerg, 2009). Policy dynamics can represent diverse policy-making processes and look for elements and patterns that drive policy stability and change (Capano & Howlett, 2009).

Institutional change can affect policy changes. Institutional change emphasises formal institutions, which have the authority to make rules and procedures, and the relationship between institutions and various other actors (Bell, 2017; Royles & Lewis, 2019). On the other

hand, institutional changes can also arise due to changes in regime leadership, which then affect confident policy choices that aim to create stability in structural pattern relationships (Shih et al., 2012).

Changes in institutions, leadership regimes, and socio-technological space can also affect policy changes (Teschner et al., 2013). The role of technology in policy change is still not widely discussed in various literature. Sabatier (1988) stated that technology's role is similar to crises that come with external pressure on institutions. Both can influence policymakers to make policy changes.

The development of Industry 4.0 has driven changes in many business industries, including the media and entertainment industry, which is also driven by the use of technology (Marr, 2022). In the entertainment and media industry, technological developments have influenced many things, ranging from special effects that are often used in movies, such as CGI (computer-generated imagery), the development of streaming services, games with VR technology, and various new mediums for news, music, and advertising. The world's technology companies continue to develop technology focusing on the shadow of the future environment, affecting how humans experience living, working, and even playing (Howard, 2022). The development of digital technology is also influential in sports and entertainment, such as VR and AR, Metaverse, NFT, and esports.

The development of esports is the fruit of technological developments. One is the proliferation of mobile gaming (Andarningtyas, 2020), which involves playing games through mobile phones. Plus, many affordable phones can support gaming activities, and playing games on mobile phones is cheaper than playing games on a PC (personal computer). At the beginning of 2023 (Kemp, 2023), it was recorded that there were 5.44 billion mobile phone users or as many as 68% of the total human population in the world. Internet penetration has also increased, with internet users as many as 5.16 billion or 64.4 per cent of the world population. Esports itself is a new industry with a lot of economic and non-economic potential. The government can support the development of esports because esports can also promote the creative industry and act as a soft power for the country. As part of sports, the government can also use esports diplomacy as a medium of diplomacy (Murray et al., 2020). In addition, according to Sung and Umar (2020), esports can be said to be a new industry worth billions, which can be a new source of taxes to increase the country's fiscal budget.

Thus, esports is an interesting case study that needs to be researched using a policy dynamics analysis approach. The development of esports also affects the development of other industries, such as the digital economy, through various micro-transactions provided by game manufacturers. This shows that technological developments and consumer engagement with video games can impact the digital economy. Research from Akbar and Kusumasari (2021) confirms that video games as a new media or media can be a medium of political marketing or an effective medium in persuading the public regarding policies.

Ito et al. (2022) explained that in the development of the esports industry around the world, Southeast Asia is the region with the fastest growth of the esports market in the world. Based on a report from Newzoo, it is stated that the esports market in Southeast Asia, from a value of USD 39.2 million in 2021, will grow to a value of USD 72.5 million in 2024. In addition, Indonesia is also mentioned as the most significant contributor to esports viewers in Southeast Asia, with a total of 17 million viewers. This shows that the popularity of esports can also be felt in Indonesia.

Just like how esports continues to develop globally, the development of world esports is also felt in Indonesia, which can be seen in policy dynamics. Based on Law No. 3 of 2005 concerning the National Sports System, esports cannot be considered part of sports. One of the important points in the journey of esports to become an achievement sport is the presence of esports as one of the exhibition branches in the 2018 Asian Games Jakarta – Palembang (Jeko, 2018). Fikrie (2018a) explained that 2018 the 2018 Asian Games Jakarta - Palembang became

the first official international sports tournament in the world, including esports as one of the sports contested with exhibition status.

In August 2020, the Ministry of Youth and Sports and KONI (Indonesian National Sports Committee) officially recognised esports as an achievement sport in Indonesia. Then, the Indonesian government approved PBESI as the only institution that oversees esports as an achievement sport in Indonesia under KONI (Sibarani, 2020). Then, in the same year, KONI issued a Decree dated September 8, 2020, which officially stated that PBESI (Indonesian Esports Executive Board) is the parent organisation of achievement sports for esports, which has a mission to develop and promote the Indonesian esports ecosystem (PBESI, n.d.). Not only through the establishment of institutions is recognition of esports also contained in the policy.

In 2021, PBESI made regulations related to esports in Indonesia by issuing the Indonesian Esports Executive Board Regulation Number 034/PB-ESI/B/VI/2021 concerning the Implementation of Esports Activities in Indonesia as the implementing regulation for the implementation of esports in Indonesia. After that, in 2022, the government revised Law No. 3 of 2005 concerning the National Sports System by ratifying Law No. 11 of 2022 concerning Sports.

The emergence of esports as a form of competitive game competition has received significant attention worldwide, including in Indonesia. Esports has evolved from a niche hobby to a global phenomenon with an audience, inviting sponsors, and media coverage. The activity of playing games, which was once only a subculture in society, has now turned into a competitive activity. Windholz (2020) explained that esports needs regulation because there is a contest between parties in implementing its activities. Kelly et al. (2021) also emphasised the need for policies in the esports world, especially challenges in the esports ecosystem, such as those related to the integrity, welfare and health of esports players whom young people dominate. It can be said that esports is also a phenomenon and an industry that is developing in Indonesia, so the role of the government is also needed. Kawi et al. (2022) explained that esports must be well-regulated to benefit the Indonesian people most.

As one of the new industries, Esports has positive economic potential for the country. It is considered an industry with a potential value of up to millions of dollars (Pei, 2019). Based on statistical data, the prize amount from the National Basketball Association is USD 13 million; for the Golf Masters, it is \$11 million; and for the Confederations Cup, it is USD 20 million. With a total prize pool of USD 24.7 million, esports is above any other sport (WEF, 2018).

Esports can also reach its fans through various, more up-to-date mediums. Esports fans can watch the match through live streaming channels like YouTube and Twitch. In the first quarter of 2018, esports fans spent 17.9 million hours watching game matches on the platform (WEF, 2018). Video games have recently become a form of entertainment that the audience can enjoy. Live streaming has transformed the gaming industry into a profession that can generate a huge income every year.

The phenomenon of economic potential in the video game industry and changes in esports policy are important research studies to conduct. In the future, technological developments will continue to be present and become a challenge. The esports phenomenon is an important case study so that stakeholders can be more responsive and react better to the birth of new technology-based industries or new habits in society that can have an economic and non-economic impact in the future. Thus, this study seeks to answer the question:

Q1: Is there an economic reason for a change in sports policy that recognises esports as a part of the sport?

Q2: What are Indonesia's current policies in response to the economic potential of the video games industry?

METHOD

This type of research is normative or doctrinal policy research that uses policy documents as the basis for norms. The system of norms in question is related to principles, norms, laws and regulations related to the case raised (Rusli, 2006). This research aims to understand policy, how it functions, and its implications in policy implementation. This research also concerns a critical review of laws and regulations. This research will use a legislative approach, namely, using laws and regulations to conduct research. Data is collected from books, journals, relevant laws and regulations.

In addition, this research is also equipped with a qualitative descriptive research method, which is an investigation process to understand social problems based on the creation of a complete holistic picture formed with words, reporting the informant's views in detail, and arranged in a natural setting (Silalahi, 2012). Qualitative research is considered to find answers by examining various social conditions, social groups, and individuals who occupy a particular social order they want to study (Berg & Lune, 2012).

Qualitative methods (Spencer et al., 2014) are considered very suitable for answering various problems, such as looking at the influence of culture on psychological development and its role in psychological interventions. The author also conducts descriptive research (Walliman, 2005), which is research based on data collection and observation. This type of research seeks to test a situation to prove or establish how a situation could have occurred. The selection of this descriptive qualitative approach is also used to reveal the meaning of the emergence of the video games phenomenon as a new industry and to see and analyse the dynamics of esports policy changes in Indonesia from an economic perspective.

RESULTS AND DISCUSSIONS

In recent years, Indonesia's esports and video game industry has experienced rapid growth, becoming one of the sectors that has attracted attention from both the government and the public. Policies related to esports began to develop along with the increasing popularity of game competitions involving players from various circles. This study aims to analyse the dynamics of esports policies in Indonesia, investigate how these policies affect the industry's development, and provide economic benefits for Indonesia.

On the other hand, the economic potential of the video game industry in Indonesia is also increasingly visible, with the increasing number of gamers and investment in game development. This research will explore the economic potential of this sector, including its contribution to the national economy. By identifying the factors that affect these two aspects, it is hoped that this research can provide an in-depth understanding of the challenges and opportunities in Indonesia's video game industry.

Economic Potential of the Video Games Industry

The video game industry has experienced tremendous growth in recent years in terms of players and revenue. Globally, the esports market is estimated to be worth billions of dollars. In 2023, the global esports market is valued at USD 1.72 billion and is projected to grow to USD 9.29 billion by 2032 (Fortune Business Insights, 2024). Technological advancements, particularly in internet connectivity and gaming devices, have accelerated the adoption of esports as one of the primary forms of entertainment, even in developing countries.

Based on statistics in 2023, the country with the most significant revenue from the video game industry is the United States, with a total revenue of USD 46.7 billion. China is second with USD 44.6 billion, and Japan is third with USD 18.4 billion (Newzoo, 2024). Table 1 lists the 10 countries with the largest video game markets.

Table 1 Countries with the Largest Video Games Market

It	Country	Revenue (USD)
1	United States	46.7 billion

2	Chinese	44.6 billion
3	Japan	18.4 billion
4	South Korea	7.4 billion
5	Germany	6.6 billion
6	English	5.5 billion
7	France	4.2 billion
8	Canada	3.2 billion
9	Italy	3.2 billion
10	Mexico	2.5 billion

Source: (Newzoo, 2024)

Meanwhile, the total economic value of the Indonesian game market is pegged at around USD 1.1 billion in 2023 (Tandiah, 2024). Indonesia also accounts for 43 per cent of game players in Southeast Asia. Indonesia, with a population of more than 270 million people and the majority of the young generation who are tech-savvy, has excellent potential to become one of the major players in the industry. The popularity of esports in the country continues to increase, as can be seen from the many national-scale tournaments such as the Esports President's Cup and the participation of Indonesian esports athletes in international events. In 2023, the Indonesian esports team managed to become the overall champion of the esports branch by winning five medals, namely three golds and two silvers, at the 2023 SEA Games in Cambodia (Kemenparekraf/Baparekraf RI, 2023).

More than just entertainment, the video game industry offers significant economic opportunities for Indonesia. The development of local talent, the creation of jobs in various related sectors such as game development, marketing, and broadcasting, and the export potential of game products made in Indonesia are concrete examples of his contribution. By taking advantage of this momentum, Indonesia has an excellent opportunity to make esports one of the drivers of economic growth in the digital era. However, developing the video game industry in Indonesia is not without challenges. The growing game industry in Indonesia managed to reap revenue of up to IDR 25 trillion in 2022. However, as much as 99.5 per cent of the revenue is included as income from foreign companies engaged in the field of game application providers. Meanwhile, the share of domestic game industry players is only 0.5 per cent (Purnama & Adji, 2023).

Dynamics of Esports Policy in Indonesia

Policy dynamics, also called policy change, is a gradual change (*incremental shifts*) in an existing structure, or it can also be a new policy or innovation policy (Cerna, 2013). Policy changes arise when the government starts a new approach by postponing or cancelling previously existing actions and directives so that policy changes can also be seen as a policy dynamic (Putera et al., 2023). This means the policy can be expanded, reduced or changed in various ways.

In analysing the 'third order' of policy change, Peters (1996) has four elements that must be considered: the 4 Is (*Four Is*). The four elements are ideas, interests, individual, and institutional determinants of the policy change process. Dudley and Richardson (2005) further explain that a key factor in understanding the paradox of the linkage between stability and policy change is understanding how new ideas can be absorbed and result in policy changes. Policy change is also based on a paradigm shift in understanding the concept of the policy (Hall, 1993). In these four determinants or dimensions, it can be seen that policy changes are determined by the existence of ideas, interests, actors or stakeholders involved, and there is an arena where policies are formulated.

The development of *the esports* world in Indonesia began to be felt in 2012 when a new actor appeared in the esports world, namely IeSPA (Indonesia eSports Association). This

organisation was then ratified in the deed of establishment on April 1, 2013, as a single forum for fostering and realising the aspirations, appreciation, participation, recreation and achievements of the Esports activist community in Indonesia (IESPA, n.d.). Then, in February 2013, the AGI (Indonesian Game Association) became a forum for communication, development, and advocacy for game industry business actors in Indonesia (AGI, n.d.). Then, in 2014, IeSPA became part of FORMI (Federation of Recreational Sports – Indonesian Society) and signalled that esports had been considered part of recreational sports in Indonesia. Furthermore, in supporting the process of integrating esports into sports, FORMI also assisted IeSPA in joining the IESF (International Esports Federation) in 2013 (IESPA, n.d.). The development of esports can be seen again in 2015; Indonesia finally sent a national team contingent for the first time for esports competition under IeSPA in the IESF Esports World Championship 2015 Busan (Mamduh, 2015). Then, in 2018, IeSPA also became part of the KOI (Indonesian Olympic Committee) and AESF (*Asian Esports Federation*) as a member. This further strengthens the position of esports in Indonesia as part of sports by joining national and international parent organisations.

In 2020, a new actor emerged, namely PBESI (Indonesian Esports Executive Board) and was later recognised as part of KONI. At PON XX in Papua, Esports first competed in the PON event as an exhibition match. 2021, the government issued Presidential Regulation No. 86/2021 concerning the Grand Design of Indonesian Sports. Then, in 2022, Law 11/2022 on Sports was issued, which replaced Law No. 3/2005 on the National Sports System as a new sports policy. In this revision, the government also began to mention electronic-based sports. In Law 11 of 2022, article 20, paragraph 5, letter m reads:

"To advance achievement sports, the central government, local governments, and/or the community may: (m.) develop technology-based sports."

Law 11/2022 explains that changes were made because Law No. 3 of 2005 concerning the National Sports System is considered unable to answer the problems, demands, dynamics, and actual conditions in sports. Sports development is considered to be able to ensure equal distribution of sports opportunities, improve the quality, relevance, and efficiency of sports management, and face challenges in accordance with the demands and dynamics of changes in sports, including changes in global challenges that are more dynamic and adapted to the era of the digital industry.

Industrial development also needs to be followed by tax system adjustments to maximise state revenue. The previous tax policy was regulated through Law 36/2008 concerning the Fourth Amendment to Law 7 of 1983 concerning Income Tax. Article 4, paragraph 1 explains, "What is the object of the tax is income, namely any additional economic ability received or obtained by the Taxpayer, both from Indonesia and from outside Indonesia..." However, Sung and Umar (2020) explained that the law still has difficulties when applied to the video game industry, especially in streaming.

The law regulating taxes in Indonesia also later found its dynamics and was amended by Law 7/2021 concerning the Harmonization of Tax Regulations. In this law, where pro-players already have a contractual relationship with the Company (club) and are considered employees, the tax rate imposed is in accordance with Article 17 of the Income Tax Law. Then, if a gamer has other income, including income from *AdSense* on YouTube and donations during live streaming, it is considered income from freelance work outside of their salary from the club.

The tax treatment of free work carried out by athletes has attracted attention due to the Regulation of the Director General of Taxes Number PER-16/PJ/2016, which categorises sportsmen or athletes as income recipients who are subject to Income Tax (PPh) Article 21 and/or Article 26. Thus, even though he does not earn IDR 4.8 billion, a gamer cannot calculate income tax based on Government Regulation Number 23 of 2018 at a rate of 0.5% of turnover. Then, according to the Regulation of the Director General of Taxes Number PER-16/PJ/2016,

one type of income whose taxes are financed by the government is any receipt in any form provided by government agencies. Therefore, it can be concluded that gifts distributed by the government fall into the category of tax objects borne by the government, and thus, the gifts will not be subject to tax withholding.

Economic Importance in Policy Change

The growth of *esports* in Indonesia reflects a complex policy dynamic, where various actors, institutions, and interests interact to drive the recognition of *esports* as part of the sports of achievement. This transformation process can be seen through official recognition by PBESI in 2020 and the revision of Law No. 3 of 2005 to Law No. 11 of 2022 concerning Sports, which includes technology-based sports. This shows that policy changes are related to stakeholders' interests and the economic opportunities that arise from technological developments.

With the enactment of *esports* as part of sports, professional *esports* players who are members of *esports* clubs have a clear status as employees and athletes. This makes the tax status and the status of the relationship between athletes and clubs even clearer. Not only their status as club employees, but these athletes can earn income from side activities as streamers on YouTube or Twitch.

Esports also offers opportunities for soft power and diplomacy. Indonesia's participation in international tournaments, such as the 2018 Asian Games and the 2023 SEA Games, not only strengthens the national image but also opens up opportunities for collaboration with other countries. *Esports* can be used to promote local culture through games made in Indonesia that represent the rich culture of the archipelago. This strategy can make Indonesia a key player in technology-based cultural diplomacy and will undoubtedly improve Indonesia's image in the eyes of the international community. In addition, diplomatic relations can also bring economic benefits such as increased investment, collaboration or sharing best practices (Kemenparekraf/Baparekraf RI, 2024)

However, several challenges need to be overcome. *Esports*-related regulations still have gaps, especially in the penetration of technology infrastructure outside big cities, limiting accessibility for the *esports* community in remote areas. The government needs to work with the private sector to expand this access so that *esports* can develop inclusively. *Esports* talent also needs to be a concern for the government. The larger the technology infrastructure network, the wider the access will be to reaching the talents of the professional *esports* world in Indonesia.

In the context of state revenue, *esports* has significant potential. With Indonesia's gaming industry's revenue reaching USD 1.1 billion in 2023, the sector has become an important contributor to the digital economy. However, significant challenges remain, especially the dominance of foreign companies that control 99.5% of total revenue. This situation shows the need for policies that are more supportive of local game developers. Several stages need to be considered by the Indonesian government to maximise the economic potential of the video game industry; the first is to encourage domestic video game production through various breeds such as tax incentives, access to financing, and training programs to create competitive products in the international market. The next step is for the government to have a program related to marketing Indonesian video game industry products so that local game products can be known to the broader community domestically and abroad.

CONCLUSION

The *esports* industry in Indonesia shows great potential both from an economic and social perspective. The recognition of *esports* as a sport of achievement reflects progress in policy, but challenges still need to be overcome. The main obstacles that require serious attention are the dominance of foreign companies in the gaming industry's revenue, lack of support for local developers, and limited infrastructure.

By utilising esports as a tool for cultural diplomacy and strengthening the ecosystem through inclusive policies, Indonesia can make esports one of the main drivers of the digital economy. Cross-sector collaboration between government, private sector, and community is urgently needed to address existing challenges and maximise the industry's benefits. Indonesia's success in managing and developing esports will not only make a significant economic contribution but also strengthen its position as a leader in the regional and global creative industry.

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