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COMPETITIVENESS OF INDONESIA'S CREATIVE ECONOMY INDUSTRY IN THE GLOBAL MARKET: SCP APPROACH

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Abstract

Indonesia's creative economy industry has occupied a strategic position as a major contributor to the national economy, with its contribution to Gross Domestic Product steadily increasing over the past decade. This study aims to analyze the competitiveness of Indonesia's creative economy industry in the global market using the Structure-Conduct-Performance (SCP) approach. The SCP framework was chosen because it enables a comprehensive analysis of market structure characteristics, industry player behavior, and resulting performance. The method used is a descriptive qualitative approach based on a systematic literature review, drawing on sources from Google Scholar, Scopus, and ScienceDirect, covering the period 2018 to 2026. The results show that the industry's competitiveness is influenced not only by market structure but also by entrepreneurs' ability to innovate, leverage digital technology, and create products with unique and strong identities. These factors are the main drivers of increased competitiveness amidst increasingly dynamic global competition. Therefore, the government needs to strengthen its role as a facilitator by providing a conducive business climate, simplifying regulations, and increasing business access to global markets. Furthermore, it is necessary to develop creative economy centers in various regions that are connected to local potential and international market needs. As a policymaker, the government needs to expand collaboration with the private sector, universities, and creative communities to strengthen the industry ecosystem. With targeted policies and stakeholder synergy, the creative industry has a significant opportunity to increase competitiveness and become a leading sector in driving future national economic growth.

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INTRODUCTION

Current global economic developments demonstrate that economic growth relies not only on the availability of natural resources but also on human capacity to generate ideas, innovation, and creativity. These changes have driven the emergence of the creative economy as a sector playing a vital role in modern economic development.

According to Howkins (2001), the creative economy is an economic activity that stems from individual creativity and produces various products and services that have economic value through the utilization of intellectual property. In line with this, the United Nations Conference on Trade and Development (UNCTAD) defines the creative economy as an economic sector that integrates elements of creativity, culture, technology, and trade to promote sustainable economic growth.

The increasingly rapid development of digital technology has also expanded the creative industry's scope, enabling it to reach a wider market and create various new economic opportunities. It is not surprising that the creative economy is currently one of the fastest-growing sectors worldwide, as it encourages innovation, creates jobs, boosts exports, and strengthens a country's cultural identity (UNCTAD, 2024).

Indonesia has significant potential to develop its creative economy. Its rich cultural heritage, diverse arts, and large working-age population are key assets that drive this sector's growth. The government also acknowledges that this sector has 17 subsectors that continue to grow over time.

These subsectors include applications, game development, architecture, interior design, visual communication design, product design, fashion, film, animation, video, photography, crafts, culinary arts, music, publishing, advertising, performing arts, fine arts, television, and radio (Creative Agency, 2026). Bekraf noted that Indonesia's creative economy performance in 2022-2024 showed a positive trend in relation to GDP, with its contribution in 2022 reaching IDR 1,370.4 trillion (7 percent), in 2023 reaching IDR 1,476.2 trillion (7.07 percent), and in 2024 reaching IDR 1,611.2 trillion (7.28 percent). In terms of employment, BPS noted that in 2025, this sector absorbed 27.40 million workers or 18.70 percent of the total national workforce.

From an export performance perspective, Bekraf noted that the export value of Indonesian creative economy products in 2025 reached 26.68 billion US dollars, with the fashion, crafts, and culinary subsectors as the largest contributors (Creative Agency, 2026). This data shows that the creative economy is not just a supporting sector, but rather a key driver of the national economy.

Despite its significant potential, Indonesia's creative industry remains competitive in the global market and faces various challenges. Increasingly open competition demands that creative entrepreneurs produce innovative, high-quality products that adapt to changing market needs. However, the majority of creative economy players in Indonesia are still dominated by micro, small, and medium enterprises (MSMEs) that face limitations in capital, technology, and human resource capacity. Limited access to financing remains a major challenge for actors in the creative economy.

This problem arises because most creative businesses rely on intangible assets, such as creativity, design, brands, copyrights, and various other intellectual property, as their primary source of economic value creation. Unlike physical assets, which are relatively easy to assess and use as collateral, intangible assets are often difficult to quantify and therefore not fully accepted in conventional financing systems.

According to Brassell & Boschmans (2018), financial institutions generally still prioritize tangible assets as the basis for lending, so businesses based on intangible assets tend to face obstacles in obtaining financing. In line with this, the World Intellectual Property Organization (WIPO) explains that companies relying on intellectual property have not been fully accommodated in credit assessment mechanisms.

As a result, many creative businesses experience limited capital to innovate, increase production capacity, improve product quality, and expand market reach (WIPO, 2025). This situation can ultimately hinder business growth and reduce the creative economy industry's ability to increase its competitiveness in the global market.

In addition to limited access to financing, protecting Intellectual Property Rights (IPR) remains a challenge for Indonesia's creative economy. IPR plays a crucial role by providing legal protection for entrepreneurs' creativity and innovation. This protection allows entrepreneurs to derive economic benefits from their creations and encourages continued innovation.

However, in practice, many IPR violations persist, such as piracy, product imitation, and unauthorized use of works. Huda et al. (2023) explained that low public awareness of the importance of copyright and suboptimal law enforcement hinder intellectual property protection in the creative economy. This situation can reduce entrepreneurs' motivation to develop new ideas and innovations, as their creative output risks exploitation by others without commensurate benefit to the creators.

On the other hand, the increasingly rapid development of digital technology actually opens up significant opportunities for creative economy players to increase their competitiveness. Utilizing digital technology can help businesses expand their market reach, improve operational efficiency, strengthen product promotion, and build broader relationships with consumers.

However, not all creative entrepreneurs can fully capitalize on these opportunities. Research conducted by Aryanti et al. (2023). This indicates that many creative industry players still face obstacles in adopting digital technology, developing digital-based innovations, and utilizing various digital platforms to support their business activities.

These limitations prevent businesses from adapting quickly to changes in the increasingly digitalized business environment. Consequently, the opportunities offered by technological developments are not being fully utilized to increase productivity, expand market access, and strengthen their competitive position in an increasingly competitive market.

These various issues demonstrate that the competitiveness of the creative economy industry is not solely determined by business actors' ability to produce creative and innovative products. Other supporting factors, such as digital technology, access to resources, and a supportive industrial environment, also influence competitiveness. Therefore, efforts to increase the competitiveness of the creative economy require a more comprehensive approach that accounts for the various factors that influence the industry's overall performance.

Upon closer examination, the various obstacles facing the creative economy industry do not arise in isolation; rather, they are interconnected. Limited access to financing, low innovation capabilities, weak intellectual property rights protection, and suboptimal technology utilization indicate specific conditions within the structure of Indonesia's creative economy industry.

The industry's structure, still dominated by small-scale businesses, limits companies' ability to invest, develop technology, and expand their markets. These conditions then influence the behavior of business actors as they implement business strategies, including innovation, promotion, product development, and market expansion.

Ultimately, the decisions and strategies taken by business actors will determine the levels of productivity, efficiency, profitability, and competitiveness that can be achieved. In other words, the competitiveness of the creative industry results from the interaction between industry conditions and the behavior of the business actors within it.

The relationship between industrial structure, business actor behavior, and industrial performance is explained by the Structure-Conduct-Performance (SCP) paradigm developed by Mason (1939) and Bain. This paradigm holds that market structure influences companies' behavior in conducting their business activities, while that behavior determines the resulting performance.

In this study, industry structure is evident in market concentration and barriers to entry. At the same time, company behavior is observed through innovation strategies, technology utilization, and market development carried out by business actors. Meanwhile, industry performance can be measured by the creative economy's productivity and competitiveness. Therefore, the SCP approach is considered capable of providing a more comprehensive explanation of the factors that influence the competitiveness of the Indonesian creative economy industry in the global market.

Various studies on the creative economy in Indonesia have been conducted with various study focuses. Setiawan (2018) explains that the creative economy has great potential to increase Indonesia's competitiveness, supported by cultural richness, community creativity, and increasingly rapid technological development. Meanwhile, research by Ichsan & Verena (2020) shows that production factors such as labor, capital, raw materials, and government policy support play an important role in increasing output, added value, and exports in the creative industry.

Other research by Syahbudi et al. (2023) emphasizes strategies to enhance the competitiveness of creative MSMEs in international markets through the SOAR approach. In contrast, Pangestika examines the opportunities and challenges of developing Indonesia's creative economy toward Golden Indonesia 2045 using a SWOT analysis. The results of these studies indicate that the creative economy is increasingly important in driving economic growth, creating jobs, and enhancing national competitiveness.

However, most previous research has focused on the creative economy's contribution to the economy, MSME development, digital transformation, and strategies for improving competitiveness from a policy and managerial perspective. These studies generally fail to fully explain how industry conditions influence business behavior and how that behavior ultimately determines the level of competitiveness achieved.

On the other hand, the Structure-Conduct-Performance (SCP) approach has been widely used to analyze various industrial sectors, particularly manufacturing, banking, and processing. Yuliati et al. (2024) show that market structure influences company behavior and industry performance, while Lipczynski et al. (2017) explain that the level of competition, market concentration, and barriers to industry entry are important factors that influence a company's strategy for achieving optimal performance.

In the creative economy sector, Munawaroh's (2021) research is one of the studies that have applied the Structure-Conduct-Performance (SCP) approach to analyze the market structure, behavior, and performance of the creative industry in Indonesia. The study found that several subsectors of the creative economy exhibit relatively high market concentration and that market share influences industry efficiency.

However, the study still focuses on the condition of the creative industry in the domestic market and has not connected it to the industry's ability to face global competition. In the current era of globalization and digitalization, industrial competitiveness is not only determined by a company's ability to innovate and market its products. However, it is also influenced by the industry's structure, which shapes the behavior of business actors and ultimately determines the industry's overall performance.

Given these conditions, there remains a research gap that warrants attention. To date, research examining Indonesia's creative economy's competitiveness in the global market using the SCP approach remains relatively limited. Most creative economy research addresses competitiveness from the perspective of strategy, innovation, or policy, while SCP research is more often applied to conventional industrial sectors.

As a result, few studies comprehensively explain how the structure of Indonesia's creative economy industry influences business behavior and how these two factors contribute to the industry's performance and competitiveness in the global market.

Therefore, this study was conducted to fill this gap by analyzing the competitiveness of Indonesia's creative economy industry in the global market using the SCP approach.

Through this approach, the research is expected to provide a more comprehensive understanding of the factors that determine the competitiveness of Indonesia's creative economy, while enriching studies in industrial economics and the creative economy in Indonesia.

RESEARCH METHODS

This study uses the Systematic Literature Review (SLR) method to examine and synthesize research findings on the competitiveness of Indonesia's creative economy industry in the global market from a Structure-Conduct-Performance (SCP) perspective. The SLR method was chosen because it allows researchers to systematically search for, select, evaluate, and synthesize the literature, thereby generating a more comprehensive understanding of the topic under study.

In its implementation, this study follows the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) guidelines developed by (2021). The use of the PRISMA guidelines aims to ensure that the literature search and selection process is carried out in a structured, transparent, and scientifically accountable manner.

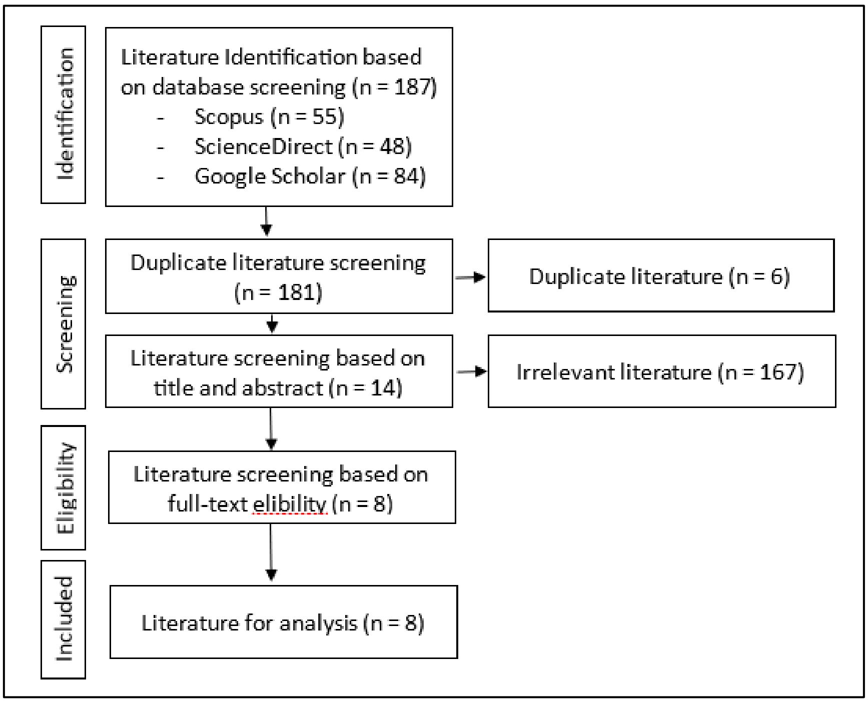
Identification

The most important stage in the SLR using the PRISMA guidelines is identifying literature through databases. The literature criteria required in this study include: (1) literature published between 2018 and 2026; (2) literature in the form of journals or scientific articles; (3) literature discussing the competitiveness of the creative economy industry using the SCP approach; (4) literature available in full-text form; and (5) literature written in Indonesian or English.

The article search process was conducted using a combination of titles, abstracts, and keywords tailored to the research objectives, including creative economy, creative industry, competitiveness, global competitiveness, Structure-Conduct-Performance, SCP, and Indonesia. These keywords were combined with Boolean operators such as AND and OR to obtain articles related to the research focus.

The literature used in this study was obtained from several reputable databases, namely Scopus, ScienceDirect, and Google Scholar. These three databases were selected because they provide scientific articles relevant to the research topic. A total of 187 were found through literature searches and screening.

Figure 1. Flowchart PRISMA



Source: Processed by author

Screening

After the literature identification stage was completed, a duplicate article examination was conducted. Based on this process, 6 duplicate articles were identified and removed, reducing the number of articles that could be analyzed to 181. The next stage was selecting articles based on titles and abstracts.

Title selection was carried out by matching the suitability of research keywords, so articles that did not contain keywords were removed from the selection process. Next, abstract screening was carried out by assessing their suitability to several research questions, namely, whether the study focused on the competitiveness of the creative economy industry using the SCP approach or whether its context was general.

Eligibility

At this stage, each piece of literature was evaluated based on its availability and overall suitability. Articles not indexed in Scopus or Sinta, not in the form of articles (e.g., books, proceedings, theses, reports, news, or other publications), not available in full-text versions, and not relevant to the research objectives were excluded from the selection process.

Furthermore, studies that did not address the competitiveness of the creative economy industry using the SCP approach were excluded from this process. The results of this stage indicated that 8 studies met all criteria and were deemed worthy of further analysis.

Included

In the final stage, literature that passed the entire selection process was designated as the primary source for the research analysis. From the screening results, only five articles met the criteria and were eligible for further analysis. This number indicates that research specifically addressing the competitiveness of the creative economy industry using the SCP approach is still limited.

This finding indicates a research gap, particularly in examining the relationship among market structure, business actor behavior, and the performance of the creative economy industry, which warrants attention. Therefore, further studies in this area are needed to deepen our understanding of the relationships among market structure, business behavior, and industry performance in enhancing the competitiveness of the creative economy.

The data obtained from selected articles were analyzed using thematic analysis. This technique involves grouping research findings into specific themes related to the SCP paradigm. In terms of structure, the analysis focused on market concentration, industry entry barriers, market share, and competitive structure.

In terms of conduct, the analysis focused on innovation strategies, digital technology use, marketing strategies, and product differentiation. Meanwhile, the analysis focused on productivity, profitability, export growth, and industrial competitiveness.

RESULTS AND DISCUSSION

Indonesia's creative economy industry exhibits characteristics relevant to understanding through the Structure-Conduct-Performance (SCP) paradigm, as its performance is determined not only by the internal capacity of business actors but also by market structure, competitive patterns, and strategic responses to global change. The SCP approach is used to directly explain the relationship between market structure, business behavior, and creative industry performance.

Conceptually, the creative industry is also described as a sector that relies on creativity, expertise, talent, and the utilization of added value from ideas and intellectual property. Therefore, the competitiveness of Indonesia's creative industry in the global market needs to be analyzed not only from an export perspective, but also from the perspective of this sector's ability to build a healthy market structure, adapt to changing business environments, and deliver superior performance.

Structure of the Creative Economy Industry

According to the SCP paradigm, industry structure is the initial factor that influences the behavior of business actors and determines an industry's performance. Bain (1959) explains that industrial structure can be analyzed through market concentration, barriers to entry, market share, and the form of competition. In Indonesia's creative economy, the market structure is diverse because most business actors are micro, small, and medium enterprises (MSMEs).

However, in several subsectors, some business actors have market power over others. Munawaroh (2021) shows that the Indonesian creative industry tends to have an oligopoly structure, with an average market share of 55 percent and a concentration ratio (CR4) of 49 percent. This situation indicates that market control remains concentrated in the hands of a select few business actors, resulting in uneven competition.

Judging from the level of market concentration, some subsectors of the creative economy play a more dominant role than others. Data from the Creative Economy Agency (BEKRAF) shows that the culinary, fashion, and crafts sectors contribute the largest to GDP. This dominance creates an imbalance in market share distribution, as the majority of economic activity is concentrated in certain subsectors.

From the perspective of SCP theory, this condition indicates that companies or subsectors with large market shares tend to exert greater influence on market conditions. On the one hand, market concentration can increase efficiency and strengthen competitiveness in the international market. However, this condition can reduce opportunities for new entrepreneurs to develop. Therefore, policies are needed to strike a balance between strengthening leading subsectors and providing equal opportunities for other entrepreneurs.

In addition to market concentration, barriers to entry are a crucial factor in shaping Indonesia's creative industry structure. In general, barriers to entry relate not only to capital requirements but also to access to technology, marketing networks, and creative and innovative human resources. Munizua & Riyadi (2021) explained that the availability of creative resources, technological support, access to financing, infrastructure, and institutional support heavily influences the development of the creative industry. Businesses without access to these factors will face difficulties in growing and competing.

This challenge is exacerbated when businesses attempt to enter international markets that require higher standards of quality, design, and innovation. Consequently, many Indonesian creative economy players remain focused on the domestic market due to limited resources for global expansion.

The development of globalization and digital technology has also changed the competitive structure in the creative industry. Currently, creative products from various countries can easily enter the Indonesian market through digital platforms. Conversely, Indonesian businesses also have broader opportunities to sell their products internationally.

This situation shows that geographical boundaries are no longer the main obstacle in creative business activities. Competition that previously occurred only at the local level has now evolved into regional and even global competition. Therefore, Indonesia's creative economy industry is increasingly open and dynamic. Although market opportunities have broadened, competition has also intensified, requiring businesses to be more adaptable to survive and thrive (Putri & Amaliah, 2025).

Conduct of Creative Economy Industry Actors

In the SCP paradigm, conduct refers to the strategies and actions taken by business actors in response to the market structure they face. The behavior of Indonesian creative industry entrepreneurs is currently undergoing significant changes, particularly in innovation, digital technology utilization, marketing strategies, and product differentiation. These four factors are crucial to the Indonesian creative industry's ability to withstand increasingly fierce global competition.

Innovation is a key element in the creative industry because the added value of creative products comes from ideas, creativity, and the ability to create something different. According to the Resource-Based View (RBV), competitive advantage can be created when a company possesses valuable, unique, difficult-to-imitate, and non-substitutable resources.

In the creative industry, innovation is one of these strategic resources. Mahrinasari et al. (2024) demonstrate that entrepreneurial orientation and marketing play a crucial role in creating sustainable competitive advantage. This means that companies that consistently innovate tend to be more competitive than those that rely solely on conventional business methods. Therefore, innovation serves not only to create new products but also to maintain long-term business sustainability.

The use of digital technology has also become a crucial part of the behavior of creative economy entrepreneurs today. Advances in information technology have transformed the way companies produce, market, and distribute products. Setiawan (2018) explained that advances in communication and information technology have opened up increasingly broad cross-border business opportunities. Through various digital platforms, businesses can reach international consumers without the need for physical stores or extensive distribution networks.

However, the study also shows that low technological capabilities and low talent quality still hamper Indonesia's creative industry's economic competitiveness. This condition indicates that all creative business actors have not fully utilized digital transformation. Therefore, improving digital literacy and technology mastery are crucial steps to strengthening Indonesia's creative industry's competitiveness in the global market.

Marketing strategies have also evolved along with technological advancements and changes in consumer behavior. Today, marketing no longer focuses solely on promotional activities; it also includes building long-term relationships with consumers and other stakeholders. Munizua & Riyadi (2021) show that one of the main strategies for improving the competitiveness of the creative industry is strengthening partnerships with suppliers, distributors, and customers.

This strategy demonstrates that marketing success is heavily influenced by a company's ability to build a strong business network. Furthermore, utilizing digital media also enables businesses to understand consumer needs more quickly and accurately. Therefore, an adaptive marketing strategy is crucial to increasing the competitiveness of Indonesian creative products in the international market.

In addition to innovation and marketing, product differentiation is a crucial strategy for creating competitive advantage. According to Porter, companies can win the competition if they can offer products with unique characteristics that differentiate them from competitors. In Indonesia's creative industry, product differentiation is often achieved by leveraging local culture, local wisdom, and national identity to add value. Mahrinasari et al. (2024) demonstrate that local wisdom plays a crucial role in strengthening sustainable competitive advantage.

Indonesia's unique cultural heritage is an asset that is difficult for other countries to replicate, making it a key differentiator in the global marketplace. Therefore, developing creative products that highlight local cultural identity can be an effective strategy for enhancing international competitiveness.

Performance of the Creative Economy Industry

Industry performance results from the interaction between market structure and business behavior. Industry performance is typically measured by productivity, profitability, export growth, and global competitiveness. The analysis shows that Indonesia's creative economy industry has developed quite well and is making a growing contribution to the national economy. However, several challenges remain that need to be addressed to enable this industry to compete more strongly in the international market.

In terms of productivity, the creative economy industry is showing positive developments. This sector's contribution to the national economy continues to increase through the creation of added value, employment absorption, and the growth of various creative subsectors. Syahbudi et al. (2023) explained that the creative industry plays a strategic role as a driver of national growth because it creates jobs and increases economic activity. Increasing productivity levels indicate that businesses can generate greater output with the same resources.

However, increasing productivity still faces several obstacles, such as technological limitations, uneven human resource quality, and low investment in the innovation-based creative sector. Therefore, increasing productivity remains a crucial agenda for developing Indonesia's creative economy.

In terms of profitability, Indonesia's creative industry has demonstrated strong profitability, particularly in subsectors with large market shares and high added value. Munawaroh (2021) found that market share positively influences the efficiency of the creative industry. The greater a company's market share, the greater its opportunity to increase its profits and operational efficiency.

This finding aligns with the SCP theory, which states that companies with a strong market position generally outperform their competitors. However, the profitability of the creative industry is still influenced by economic conditions, changing consumer trends, and increasingly dynamic market competition. Therefore, companies need to improve their adaptability to maintain continuous profitability.

Export growth is a key indicator in assessing the success of Indonesia's creative industry in the global market. Various studies show that the creative economy's contribution to national exports continues to increase. In addition to generating foreign exchange, increased exports also indicate that Indonesian creative products are increasingly accepted in the international market.

However, Indonesia's export contribution from its creative industry remains relatively low compared to several countries with more developed creative ecosystems. This situation indicates that the opportunity for international market development remains significant, provided it is supported by improved product quality, innovation, and the use of digital technology. Therefore, a strategy to increase exports should be a priority in developing the national creative economy.

Global competitiveness is the ultimate indicator of Indonesia's creative industry's ability to compete internationally. Setiawan (2018) shows that Indonesia's main weakness still lies in its technology and talent quality, which are not yet able to keep pace with those of competing countries.

However, Şimşek (2025) indicates that Indonesia has competitive potential in the global creative product trade. This potential is supported by its rich cultural heritage, large population, and the rapid development of the digital economy. Therefore, Indonesia's creative economy industry shows strong prospects, although further strategies are needed to sustainably strengthen its competitiveness.

CONCLUSION

The competitiveness of Indonesia's creative economy industry in the global market is determined by entrepreneurs' ability to transform local creativity, culture, and resources into value-added products that can compete internationally. SCP analysis shows that the industry's competitiveness is influenced not only by market structure but also by entrepreneurs' ability to innovate, leverage digital technology, and create products with unique and strong identities. These factors are the main drivers of increased competitiveness amidst increasingly dynamic global competition.

Although the creative economy industry has made a significant contribution to the national economy, challenges remain that must be addressed to strengthen its international competitiveness. Therefore, the government needs to strengthen its role as a facilitator by providing a conducive business climate, simplifying regulations, and increasing business access to global markets.

Furthermore, it is necessary to develop creative economy centers in various regions that are connected to local potential and international market needs. As a policymaker, the government needs to expand collaboration with the private sector, universities, and creative communities to strengthen the industry ecosystem. With targeted policies and stakeholder synergy, the creative industry has a significant opportunity to increase competitiveness and become a leading sector in driving future national economic growth.

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