

Black Panther-Style Baju Koko: Understanding the Link Between Film Industries and Fashion Business in Indonesia

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Article Info Article history: Received 03Feb 2018 Revised 20Feb 2018 Accepted 26 Feb 2018	ABSTRAK Tren pakaian pria Indonesia tahun 2018 ditandai dengan baju koko ala <i>Black Panther</i>, sejenis busana muslim yang terinspirasi dari kostum T'Challa, Raja Wakanda, dalam film <i>Black Panther</i> (2018). Makalah ini memberikan analisis heuristik yang menghubungkan dua subsektor kreatif di Indonesia dan mengeksplorasi kemungkinan penjelasan tentang bagaimana beberapa film memicu lonjakan penjualan fesyen, sementara yang lain tidak. Berangkat dari kajian konseptual isu dan kasus, tulisan ini mencoba melihat kemungkinan kolaborasi antar pelaku usaha kreatif dari berbagai subsektor agar tujuan menjadikan film sebagai lokomotif industri kreatif di Indonesia dapat tercapai. Kata kunci : <i>film, fesyen, merchandise, industri kreatif, Indonesia</i> ABSTRACT In 2018, Indonesian men's clothing trend was marked by the Black Panther-style baju koko, a type of Muslim garment inspired by the costume of T'Challa, the King of Wakanda, in <i>Black Panther</i> (2018). This paper provides a heuristic analysis that links two creative sub-sectors in Indonesia and explores possible explanations on how some films triggered a surge in fashion sales, while others did not. Departing from a review of conceptual issues and cases, this paper tries to see the possibility of collaboration between creative business actors from different sub-sectors so that the goal of making films as the locomotive of the creative industry in Indonesia can be achieved. Keywords: <i>film, fashion, merchandise, creative industries, Indonesia</i>
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INTRODUCTION

Film and fashion are closely interrelated elements of the creative industry. The link between them is characterised, among others, by the film's ability to shape fashion trends. In Indonesia, for example, the link is best evidenced by the *baju koko* (a type of traditional Muslim apparel commonly worn during Islamic holidays) that were inspired by the Hollywood film *Black Panther* (2018). This film was a popular one, earning USD 12 million—approximately IDR 174 billion—in Indonesia only (boxofficemojo.com), and selling approximately nine million tickets. It was screened in Indonesian cinemas from February to March 2018, a few months before the Ramadhan holiday—peak shopping season.¹ One wholesale trader at Tanah Abang Market in Jakarta, one of Indonesia's largest wholesale clothing and textile markets, claimed to have sold ten thousand shirts in the two weeks before the Eid holiday season; if he sold twice this amount in all of 2018, and if there were at least fifty other (offline and online) distributors like him across Indonesia, it may be estimated that one million such outfits were sold between the Eid season and the end of the year. From these figures, it is possible to estimate the film's potential multiplier effect on Indonesia's fashion industry: for every nine people who saw *Black Panther* in Indonesia, one purchased a baju koko in the film's style. Given the popularity of this product, it is possible that these figures are but the tip of the iceberg; as actual sales data are not available.

Even though such potential can be recognised readily, uncovering the real and direct connection between film and fashion/other commodities inspired by that film is challenging. Various factors contribute to the popularity of a film, and these may or may not contribute to the sale of fashion products. In the case of *Black Panther*-style baju koko, this complexity is illustrated by the fact that not everyone who purchased the apparel had watched the film. This paper, thus, explores various factors and contexts that link films with the commodities inspired by their popularity. This paper also aims to explore consumption in different creative industries and the connection between them, with the purpose of not only explaining why and how it happened but also providing practical insight into the possibility and potential that different sub-sectors of creative industries can promote and support each other. Industry practitioners could benefit from this research in their future analysis and planning of product diversification, as well as their development of merchandise businesses that include stakeholders from other creative industries.

This research initially sought to identify a formula that connects ticket sales with the increased popularity and of particular fashion commodities in an Indonesian market context. Hence, this paper posed three research questions:

1. How does film involve economic actors from the fashion industry?
2. How does the popularity of a film affect fashion trends and the sale of clothing and other merchandising?
3. Why have certain fashion products boomed (e.g. *Black Panther*-style baju koko), while others have not (e.g. *Dilan*-style denim jackets)?

This research has yet to find a formula for measuring film's economic impact on the fashion industry. However, it does provide a heuristic understanding that links the two creative sub-sectors in an Indonesian context and explores possible reasons for some films triggering a surge in fashion sales while others do not. This paper focuses on the case of *Black Panther*-style baju koko, and compares it with the cases of denim jackets inspired by the best-selling Indonesian film *Dilan 1990* (2018) and the merchandise of *Filosofi Kopi* (2015). Although several other examples are also mentioned, these three cases receive the greatest attention.

As this paper discusses cases related to the global film industry and its products, we acknowledge that fashion products such as *Black Panther*-style baju koko, Wakanda-style baju gamis, or *Harry Potter*-style glasses are not official products of Walt Disney–Marvel Studios or Warner Bros as the owners of

¹ According to Google analysis, Indonesia's peak shopping season is during Ramadhan, the month of fasting that ends with Eid Al-Fitr. For more detail, see: <https://www.thinkwithgoogle.com/intl/en-apac/consumer-insights/consumer-trends/tis-season-shop-indonesia/>.

these brands, names, or designs. Rather, the descriptors *Black Panther*, *Wakanda*, or *Harry Potter* applied to the clothing/merchandise products discussed in this paper are vernacular expressions of generic fashion products that mimic the costumes worn by the protagonists of these films. Anthropologically, we situate the production and sale of such products in a livelihood framework where producers and sellers opportunistically ride the coattails of these films to increase sales (see, for example, Long, 1999). We are aware that certain legal aspects could be relevant to this issue, yet discussing these aspects is beyond our expertise and capability. By showcasing these cases, we are not promoting the practice of intellectual property violation; rather, we seek only to show that the film industry has the ability to stimulate other creative industry sectors, directly or indirectly.

METHODOLOGY

This paper is written based on qualitative research conducted between July 2019 and February 2020. Principal data was gathered through the observation of three major textile and garment trading centres in Jakarta as well as interviews with traders and buyers in these centres. Other data were collected through a review of the literature and media, mainly from online news portals. Interviews were also conducted with members of the film industry to obtain their perspectives, with particular focus on producers, art directors, costume designers, and costume stylists. We also conducted research on popular online shopping platforms such as Lazada, Tokopedia, and Bukalapak.

Tanah Abang Market was selected as the locus of observations and interviews based on the understanding that it is one of the largest clothing and textile markets in Asia. In 2018, it had an average 178,000 visitor every day, or more than 64.9 million visitors annually. These visitors come not only from Indonesia, but also from Malaysia, Singapore, Brunei, and further afield—such as from the Middle East and Nigeria. The number of visitors swells in the months before the Eid al-Fitr holiday. One news article estimated that, in 2018, traders in Tanah Abang Market had an estimated turnover of IDR 200 billion (more than USD 14.5 million) per day (Gerintya, 2018). Meanwhile, the other two locations, ITC Mangga Dua and Pasar Senen, were chosen because of their popularity among fashion resellers and retailers in Greater Jakarta (including those from the peri-urban areas of Bogor, Depok, Tangerang and Bekasi).

DISCUSSION

Literature Review and Theoretical Issues

Film has played an important role in the development of the fashion industry, both as a media of promotion and representation (See Lunden, 2015, 2018). Based on our review of the literature, no studies have specifically focused on the relationship between the film and fashion businesses in Indonesia. Previous studies of Indonesian films have situated fashion as one element of a more complex "screen culture" within broader discussion of identity politics, religious cultural expression, and social class (Heryanto, 2015; Rakhmani, 2014); pop culture and modernity (Hanan and Koesasi, 2011); and gender aspirations (Hariyani, 2018; Surahman, 2015). It could be that such studies are absent because any attempt to find a direct correlation between these two businesses could produce simplistic explanations. Quoting Ariel Heryanto, the relationship between Indonesian screen culture and industrial capitalism is dynamic and dialectical, and thus cannot be reduced to matters of commodification and consumerism (Heryanto, 2015: 39). Many factors influence the success of a film, and thus the trends and sales of products influenced by it.

In the broader context, fashion has come to the attention of film scholars. Most agree that fashion is an important element of film, one that shapes the images of the characters, stories, messages, and ideologies that are conveyed to audiences (Lankjaer, 2012). Furthermore, film is seen as an effective medium that can influence viewers' trends, lifestyles and consumption patterns. Quoting Andy Warhol, Lankjaer writes: "It's the movies that have really been running things in America They show you what to do, how to do it, when to do it, how to feel about it, and how to look how you feel about it" (p. 91). Film is considered to have the ability to shape audiences' self-image, including their specific style and fashion. However, this ability is not unique to film; it also works with other audio-visual mass

media, such as television. Quoting Vindyarini (2008), television has a role in mass communication, being used to spread popular culture and creating "need" in audiences. Interestingly, while not explicitly identified as such in the Master Plan for the Development of the National Creative Economy (RINDEKRAF), film is understood as a "locomotive industry", one that is expected to pull the "carriages" of fifteen other creative industries (including the fashion industries) (Isna, 2019). This shows that the Indonesian government recognises the strategic position of film, as well as the economic potential of the cultural industry in general.

Due to the lack of previous studies on the link between film and fashion, this study's understanding of film vis-à-vis the fashion industry refers to a study of the consumption of popular culture products (specifically video games) in Indonesia by Rakhmani and Darmawan (2015). According to their research, video game consumption patterns in Indonesia are strongly influenced by consumers' social class: middle class consumers have access to official game consoles and software products, while lower-class consumers utilise the 'grey market' and informal production and distribution networks (Rakhmani and Darmawan, 2015: 250). They argue that this presents a paradox:

On one hand, distribution through unauthorised channels has pushed foreign investors away from tapping into the country's thriving market. But on the other, it is these illegal channels that have helped the cultural adoption of game content (Rakhmani and Darmawan, 2015: 256).

In other words, despite the violation of intellectual property rights, the grey market has helped increase the popularity of popular culture products. We may assume that this also applies in the context of the sale of fashion items and film merchandise.

Meanwhile, it is also important to note the important role of informal businesses in Indonesia, including their significant contribution to the national economy. This includes the small-scale garment industry, a major producer of fashion products (ADB, 2011; Rothenberg et al., 2016). Therefore, it is very important to recognise the formal and informal roles of micro-, small-, and medium-enterprises (MSMEs) in the fashion sector, as part of the creative economy. Several studies of MSMEs in Indonesia have shown that they lack an understanding and awareness of related issues. As such, they are prone not only to violating intellectual rights, but also falling victim to the predatory practices of other business actors (Maftuchah, Arief, and Sofyan, 2018)

Referring to previous studies of fashion, dress, and clothing (King and Clement, 2012; Kawamura, 2005; Meinhold, 2013), we identified two conceptual issues. The first is the definition of fashion itself. We find ambiguous boundaries between fashion in its practical meaning as clothing/clothes/dress/apparel (body covering), fashion in its broad meaning as ephemeral trends, styles, and appearances, and fashion in its philosophical and anthropological understanding "of an object that can either be used to cover the body or not." We found in this research that the fashion trends influenced by popular films are not only limited to particular clothing models/designs, but also other objects including various forms of 'wearable and non-wearable fashion' such as T-shirts, sunglasses, or consumables. Therefore, this article will also provide an overview of how films popularise and increase the sale of non-wearable merchandise (e.g. household appliances, placemats, and coffee cups).

The second theoretical problem is the difficulty of seeing the direct connection that could explain how the styles, designs, and models that appear in film influence the design and model of objects sold on the market. Here, the philosophical question posed by Meinhold (2013) is relevant: "What makes fashion into fashion?" He argues that it is difficult to delineate the specific characteristics and motivations responsible for changing styles in fashion and fashion advertising, since these implications are hidden, involved, and interwoven in the external appearance of fashion (pp. 14–15). This philosophical–anthropological question resonates with our finding that many clothing and accessory sellers and consumers had no knowledge that the items they sell or wear were actually replicas of film costumes or accessories. In one random interview with a consumer, he admitted that he had never seen the film *Black Panther*, and therefore did not know that the of *Black Panther*-style baju koko he was wearing was inspired by the film's costumes.²

These two fundamental issues must be considered, as they show the difficulty of defining fashion and explaining how it is influenced by the film industry. However, this does not mean that no such definition

² Interview with buyers of *Black Panther*-style baju koko, Bogor, August 2019.

or relationship exists. In this paper, we identify some fashion-related products and how the fashion industry correlates with the film industry.

The Relationship between the Film/Media Industry and the Fashion Industry in Indonesia

Films (and other audio-visual media in general) have long been used by fashion businesses to promote their products to the public. This practice has been prevalent since at least the early 1990s, when private television stations first emerged in the country. Our search of archived news programmes found that news anchors' endorsement of clothing manufacturers/distributors (including their logos/brands) have been commonplace. Such marketing strategies have been used by local and international fashion brands and distributors, including Fizz Productions, Brilliant Collections, Ballin Accessories, Kwong Tung Tailor, and Marks & Spencer. This practice has only grown as new media and celebrity groups, including film actors/actresses, have emerged.³



Picture 1. Screen capture of the popular news programme *Seputar Indonesia* (dated 30 April 2001), aired by Indonesia's first private television station (RCTI); the women's clothing brand FIZZ (worn by the female anchor) is identified in the chyron. <https://www.youtube.com/watch?v=5onrKd5u0oE>

This shows that direct cooperation between the media and fashion industries has occurred for quite some time, and remains prevalent. In one interview, the Indonesian film producer Dewi Umayu explained that collaboration between the film and fashion industries has mostly taken the form of 'barter promotion'. Designers, fashion companies, or fashion retailers provide products to be used by film characters in film productions; in return, their logo, name, or trademark is included in the film's credits. Although cooperation between these parties is bound by contract, we have difficulty identifying the real value of such barter because it is almost impossible to access such documents.

However, collaboration between the film and fashion industries has not been limited to such promotional bartering. Our research shows that the link between the film and fashion industries fall into two categories: direct/formal and indirect/informal.

Tabel 1. Matrix of actors and inter-actor relations, extracted and summarised from various data collected during research.

Factors	Direct/Formal Relations	Indirect/Informal Relations
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³ Research on celebrities' endorsement practices in fashion promotion has been done by Monica (2018) and Caesaria (2019).

Actors Involved	• Production houses, film producers • Fashion designers, fashion houses • Character designers, creative professionals • Clothing retailers • E-commerce platforms/distributors	• Clothing/merchandise wholesalers • Clothing/merchandise retailers who buy products from wholesalers and sell them in smaller shops (online or offline) • Online clothing/merchandise retailers • Household-/small-scale garment producers
Form of Relations	• Fashion designers/creative professionals hired or commissioned by film production houses to design specific wardrobes. • Promotional bartering, in the form of brand/designer name placement in film credits. • Fashion houses/designers/clothing retailers provide costumes for film characters • Product endorsement • Online marketplaces designed and managed by film producers as part of the marketing of cultural values and lifestyles narrated in the film. <i>Note: These collaborations are legally binding through contracts. However, it is difficult to determine the real value of contracts.</i>	• No direct relations between film businesses/producers or distributors • Clothing produced and distributed according to market trends. Some retailers are not aware that their products are inspired by film costumes or merchandise.
Potential actors mentioned by informants but not clearly involved in practices	Cinemas. Cinemas could be a good outlet for the sale of film merchandise, but it is too difficult to realise business collaboration due to the lack of film merchandising specialists in most production houses.	• Clothing importers • Clothing manufacturers abroad

In a direct and formal relationship, collaboration involves people in both the film and fashion industries, including production houses, fashion designers, character designers, clothing retail companies, e-commerce distributors, and fashion houses. All work together to complete film production.

Collaboration between the fashion and film industries is most evident in the role of fashion stylists, who create artistic harmony and cohesion by selecting appropriate and contextual clothing styles and colours for film characters (Landis, 2012). In an ideal film production organisation, a costume designer, fashion stylist, or "wardrobe person" has a role equal to that of the art director and acts under the coordination of the production designer. However, in practice, film productions in Indonesia rarely employ production designers, and thus a film's fashion stylist and art director directly coordinates with the film director or assistant director.⁴ According to interviews, the art department of a film production usually consists of four to ten people, each of whom earns IDR 5 to 10 million per film production. According to one producer, on average IDR 40,000,000 to IDR 100,000,000 is budgeted to pay members of this department; as such, given that film production budgets in Indonesia average between IDR 2,000,000,000 and IDR 10,000,000,000, wardrobe workers' salaries represent between 0.004% and 0.05%

⁴ See Imanda, 2022, in this volume.

of total production costs. Another finding from Imanda (2021, this volume) shows that the art and wardrobe department receives between 6.5% and 9% of the total film budget.

The second type of relation between the film and fashion industries is characterised as indirect. In such cases, actors in the fashion industry generally take advantage of opportunities available to them, recognising interest in the clothing or merchandise worn by film characters and producing/marketing replicas of said items. The most obvious example can be seen in the clothing inspired by Hollywood films such as *Black Panther*; the aforementioned *Black Panther*-style baju koko, we may be certain, were not designed by the film's fashion designer or producer.

Successful fashion products inspired by films have included not only *Black Panther*-style baju koko, but also veils inspired by *Ayat-Ayat Cinta* (Verses of Love, 2008) and denim jackets inspired by *Dilan 1990* (2018). Similarly, there is a long history of popular cartoon characters adorning children's clothing, sold without an official license.

We may learn two things from the relations between the film and fashion industries in the Indonesian cinema context: (1.) In formal and direct relations, fewer business actors are involved, as it includes only those directly involved in these sub-sectors' intersections. In such relations, less money is circulated than in informal and indirect relations. (2.) In indirect and informal relations, more stakeholders from the fashion sub-sector are involved, as such relations also include those who are not directly connected to the film business, namely those involved in the production and distribution of fashion products (garment makers, wholesale sellers, and online/offline retailers). If we take the *Black Panther*-style baju koko as an example, it appears that the amount of money circulated is greater than in formal and direct relations.

Film' Influence on Fashion Trends and Clothing Sales

At one point, Indonesian men's clothing became dominated by the *Black Panther*-style baju koko, a type of Muslim garment inspired by the costume of T'Challa, the King of Wakanda, in *Black Panther* (2018). As part of the "*Black Panther* fever" that followed the film's success in Indonesia, there emerged *Black Panther*-style baju koko in fashion centres in Jakarta (such as Thamrin City and Tanah Abang Market) and in online retail outlets. Two months before the Eid al-Fitr holiday, the media predicted that such shirts would become the best-selling clothing items of the Ramadhan shopping season (Anggraini, 2018). This prediction proved correct, as some of the traders we met said that they managed to sell large amounts of this product before the Eid al-Fitr holiday. One shop owner in Blok A, Tanah Abang Market, claimed to have sold 10,000 pieces within fifteen days.¹⁵ With each unit selling between IDR 70,000 and IDR 260,000, gross sales of IDR 700,000,000 to IDR 2,600,000,000 may be estimated. As we do not know how many sellers had such products, we cannot ascertain the exact number of products sold; nevertheless, this example can illustrate the volume of sales.



(a)



(b)

Picture 2 (a). T'Challa the King of Wakanda, in *Black Panther* (2018); this costume was used as reference by clothing producers. Source:

¹⁵ Interview with shop owner in Pasar Tanah Abang, August 2019.

<https://www.hollywoodreporter.com/heat-vision/black-panther-how-tchalla-avoids-toxic-masculinity-1085741> (b). A *Black Panther*-style baju koko sold on an e-commerce platform. Source: <https://www.tokopedia.com/maudycantik/promo-baju-koko-black-panther-hitam>

How did sales of *Black Panther*-style baju koko reach such large numbers? Here, an understanding of clothing design and naming is important. These clothes are similar in design to the tui-khim worn by Indonesia's ethnic Chinese community. This is confirmed by the style's popular name; *koko* means 'elder brother' in the Hokkien language that is widely spoken amongst the archipelago's Chinese community. The tui-khim is characterised by a closed collar and row of buttons, arranged vertically, and designed to be worn outside the pants. Under the name *baju koko*, such shirts have become culturally associated with Muslim male clothing in Indonesia. It has historically been common for the country's Muslim men to wear such clothes during Islamic holidays or during worship (*sholat*), but in the past fifteen years it has become used for daily activities and even incorporated into school uniforms (Nisa, 2008; Cahyanti, Budiarti, and Rochani, 2017). Rakhmani (2014) argues that such clothing has often been used in popular media, such as religious soap operas, to identify religious figures or those with an understanding of Islam: *baju koko*, thus, is identified with the quality of individuals' religious understanding. Although some historians have debated the Islamic image of this clothing (Isnaeni, n.d.), it does not seem to have impacted its popularity and market demand.

In the case examined here, although sales of baju koko were driven primarily by the popularity of the film *Black Panther*, the film cannot be said to be the sole factor. As we elaborate above, demand for *baju koko* existed long before the film was produced. Several male fashion designers mentioned that male Muslim clothing has developed slowly in Indonesia. Over the years, the *koko* style—with small variations and added ornaments—has dominated the clothing market (Walipop, 2013). The *Black Panther*-style baju koko is just another variant, one in a long chain of such clothing.

Another "success story"—i.e., a film that created new trends in clothing production and sale—is that of *Dilan 1990* (Falcon Films, 2018) and the denim jackets and varsity jackets worn by the film's two main characters: Dilan (the male protagonist) and Milea (the female protagonist). Though no reports have been found regarding these jackets, it may be noted that these models sold widely immediately after the film's release in early 2018. According to our observations, such jackets' popularity never reached the same level as that of *Black Panther*-style baju koko; nevertheless, such models continue to circulate on internet marketplaces even in early 2021. Such models peaked in popularity when President Joko Widodo appeared in public wearing one during official visits throughout Indonesia. Several media reports mentioned, in detail, the brand and price of the jacket worn by the president, and exemplified the head of state's support for domestic fashion products (Ngantung, 2019).⁶

Dilan 1990 was the highest-grossing Indonesian film of 2018. According to data from filmindonesia.org, this film sold more than 6.1 million tickets, making it the second most-viewed Indonesian film since 1973.⁷ A high school romance-drama set in 1990, this film follows a rebellious teenager, who is also the leader of a motorcycle gang. His rebellious nature is highlighted by his denim jacket, which in the contemporary context was a potent fashion statement.

⁶ The popularity of *Dilan* and his denim jacket was exploited in politics when one of Makassar's mayoral candidates officially adopted "*Dilan*" as a campaign brand and used a similar style of dress in campaign publications. This was designed to attract votes among young people. Although the candidate was supported by three major political parties, he lost the election. See SvH & Bmw (2020).

⁷ The film's ticket sales were exceeded only by *Warkop DKI Reborn: Jangkrik Boss! Part 1* (2016), which was viewed by more than 6.8 million people.



Picture 3. The character Dilan, wearing a denim jacket ornamented with a brown corduroy collar and flipped American flag. Source: <https://montasefilm.com/fenomena-dilan-1990-film-roman-remaja-terlaris/>

According to one fashion stylist, fashion trends inspired by films often emerge unintentionally (but are expected). Quartini Sari, the fashion designer for the *Dilan 1990*, initially had no idea that the jacket worn by the character would become popular. According to interviews published in several media, the jacket was designed not to create a new trend, but to highlight the main character; in other words, the addition of a brown corduroy collar and inverted flag was to increase his prominence (Tashandra, 2018).⁸ Nonetheless, these ornaments were precisely what drove the popularity of the model. A similar experience was voiced by Retno R. Damayanti, who designed the kerudung (veil) worn by Anisa, a character in the record-breaking film *Ayat-Ayat Cinta* (2008).⁹ She never imagined that this design would trend, even though it became extremely popular among young Muslim women (see Kholil, 2009). Interestingly, we have found that not all high-grossing films create fashion trends. Even when these blockbusters have attempted to promote merchandising, they have been unable to drive certain trends or increase product sales as in the examples discussed above.

Desire to Create Fashion Trends: Not Always Successful

In some cases, production houses intend to create new fashion trends. In these cases, fashion stylists are intentionally asked to design or select clothing styles that could potentially become popular on the market. Cases vary, from certain batik motifs worn by the main characters of the film *Habibie dan Ainun* (2012) to the hijab motifs worn by the characters of the film *Surga yang Tak Dirindukan* and its sequel (2015, 2017). In the case of the film *Surga yang Tak Dirindukan*, the production house worked together with the famous designer Mel Ahyar to design a model that was expected to become the next hijab trend. However, such deliberate efforts do not always lead to success. Our search for further information on products from these films convinced us that they did not becoming popular on the market.

Reflecting on the cases above, it is evident that production houses' difficulty predicting market response and products' limited distribution networks still limit their ability to drive clothing trends and

⁸ Interview with Quartini Sari, designer of the 'Dilan Denim Jacket', published in Kompas on 15 April 2018 (see Tashandra, 2018).

⁹ Interview with Retno Damayanti, December 2019.

merchandising. Both are important, and film producers (or other people from production companies) cannot do them by themselves. One film producer explained that managing the distribution and sale of merchandise requires significant capital and resources, and it was not possible to entrust these products to cinema networks, where most film distribution activities are centred. Merchandising requires specific programmes and resources, which exist separately from the film industry.

The Role of the Grey Market and Intellectual Property Right Issues

In March 2020, a team from the Ministry of Law and Human Rights of the Republic of Indonesia raided stores at Tanah Abang market selling *baju koko* shirt with brand: "*Gamis Wakanda*", based on a complaint from the trademark rights holder, stating that they had violated copyright infringement law (Saputra, 2020).

The importance of the grey area in Indonesia's fashion industry is dilemmatic for film producers, especially as related to the issue of intellectual property rights (IPR). This was expressed by Dewi Umayana, a film producer. On the one hand, she acknowledged IPR problems occur, with certain designs being used by other companies without consent. On the other hand, she also mentioned that it could be taken as a positive sign, one that indicates a film's popularity. This is beneficial for film producers, as "popularity helps us understand market preferences and determine the production design and marketing strategies for subsequent films productions."¹⁰ As in the video game industry, the grey market poses a paradox.

The Government of Indonesia has provided regulatory attention to the creative economy industry sector, issuing Government Regulation No. 142 of 2018 regarding the Master Plan for the Development of the National Creative Economy (RINDEKRAF). Article 1, Paragraph 1, of this regulation explains that the creative economy is an embodiment of the added value of original ideas and intellectual properties. Emerging from human intellectual creativity, it is based on science and technology, skills, and cultural heritage. Through this regulation, the government encourages creative industries to respect originality and creativity. However, in practice, as discussed above, Indonesian popular culture continues to depend on the distribution of grey-market products.

Returning to the case of the *Black Panther*-style *baju koko*, IPR issues are far from black-and-white. We can see that, in many cases, the name "*black panther*" was simply appended to a type of clothing already popular on the market. A search of online marketplaces for such clothing returns a range of men's shirts with long, black, sleeves and white ornaments on the collar, chest and cuffs. Many more variants are also available, especially in physical markets; these include shirts with different motifs, different colours, and even with short sleeves.

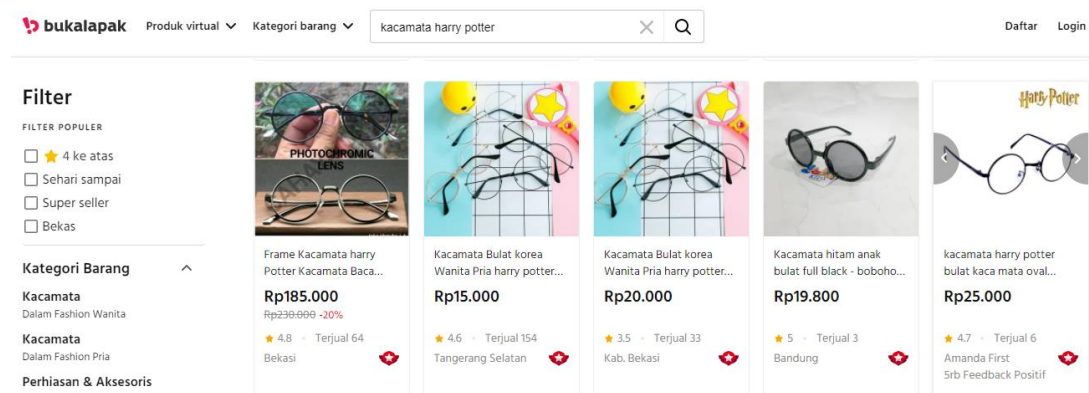
As such, even though some designers for Muslim fashion companies tried to ensure the model and ornaments closely resembled the film's costumes (BBC, 2018), this model has no fixed definition, and is thus open to a range of interpretations. Even amongst sellers, there was thus confusion. During field research, we met a shopkeeper who did not recognise the term, even though the model was available at his counter. In addition, journalists also used a range of terms to refer to this model; this includes, for example, *koko Wakanda* (*Wakanda*-style *baju koko*), which conflates the model with its (fictional) origin (Aurelia, 2018).

Upon closer inspection, it became evident that many of the *Black Panther*-style *baju koko* available on the market differed from *T'Challa's* costume in the film. The shirt in the film is inspired by Nigerian royal robes, combined with elements of military uniforms that were once popular in several African countries (Aurelia, 2018). Meanwhile, as mentioned above, the *Black Panther*-style *baju koko* sold in Indonesia are based on the Chinese tui-kim clothing, with embroidery as an additional element. Regarding this embroidery, clothing merchants in Tanah Abang identified the *Black Panther*-style *baju*

¹⁰ Interview with Dewi Umayana, November 2019.

koko as a continuation of Pakistani *kurta*, a previously popular model that returned to prominence in 2019 (Putri, 2019; Jannah, 2020).

This case shows how Indonesia's mass market fashion industry is an opportunist business, one that piggybacks on the popularity of fashion trends introduced by films. However, the *Black Panther*-style *baju koko* is neither an entirely local creation nor a wholesale adoption of global trends. Though it cannot be separated from the influence of the film *Black Panther*, it is best described as part of a process that Roland Robertson terms "glocalization", a blending of global and local content usually realised through mass consumer products (Robertson, 2012). Through this process, the motifs made popular through *Black Panther* were applied to previously defined templates and sold as a new form of *baju koko*. Complicating this matter, there are indications that some *Black Panther*-style *baju koko* products are manufactured abroad; although our research shows that most such products are produced locally in Java, some shop owners in Tanah Abang Market also claim to import their products from China.¹¹ It is interesting to see the difference between the offline and online markets. We have found that online clothing or accessories merchants are more explicit in juxtaposing film titles or characters with the items they sell; this can be seen, for example, in the "*Harry Potter* glasses", "*Tony Stark* glasses", and "*Filosofi Kopi* Cups" sold through such marketplaces. This can be understood as a means of attracting online buyers, as the sale of goods through online marketplaces relies heavily on keyword searches.



Picture 4. Screenshot of search results for "Harry Potter glasses" (in Indonesian, *kacamata Harry Potter*) on an online marketplace. Captured January 2021.

Integrated Business: Lessons from *Filosofi Kopi*¹²

Lessons can be learned from the unique success of the Indonesian film *Filosofi Kopi* (2015) and its sequel, *Filosofi Kopi 2: Ben & Jody* (2017).¹³ The production company did not end its business after producing and marketing the films, but also developed a series of coffee shops in cities throughout Indonesia. The producers, directors, and actors integrated the 'celebration of Indonesian coffee drinking culture' into the products they marketed, using values of togetherness, intimacy, and collaboration in

¹¹ Interviews with Muslim clothing merchants in Tanah Abang Market, August 2019.

¹² Although this part focuses on the case of *Filosofi Kopi*, integrated creative business models have also been used by other companies. Take, for example, the Indonesian comic Bumilangit (<https://bumilangit.com/en/landing/>). The company launched its "cinematic universe" in 2019 with the film *Gundala*, which attracted over 1.6 million viewers. It has carefully established business networks with other sub-sectors of the Indonesian creative industry to facilitate the production and distribution of merchandise.

¹³ Observation of *Filosofi Kopi* and its self-developed online business platform. See <https://filosofikopi.id/>.

their marketing. These values are manifested in various practices that distinguish *Filosofi Kopi* from other coffee shops, such as its policy of providing wi-fi, its cooperation with artists in designing merchandise products, and its implementation of a sustainable business model that accommodates coffee farmers (Gityandraputra, 2019). As of February 2020, five years after the film's release, coffee shops under this brand were operating in three major cities in Java.

To support marketing efforts, *Filosofi Kopi* also has its own online distribution platform (www.filosofikopi.id) which it uses to sell merchandise such as clothing (t-shirts, hoodies, jackets, sweaters) and accessories (hats, bags, pins, cups, etc.). It appears that *Filosofi Kopi* is the first and only serious effort to integrate merchandise and fashion into film business practices in Indonesia. In this case, it seems that the company has made a structured effort to involve small and medium businesses in its network; the process does not revolve entirely around business actors who are directly involved in film production.

CONCLUSION AND RECOMMENDATION

Film's multiplier effect on the fashion industry in Indonesia occurs mainly through informal channels: film inspires specific fashion designs. While there is a significant potential market for cultural products, they are reached through sporadic plans and result in immeasurable outcomes. Small entrepreneurs must be given an understanding of intellectual property, enabling them to avoid both lawsuits from the owners of intellectual property rights as well as falling into victim of infringing practices. Stakeholders, such as (at that time) the former Indonesian Creative Economic Agency (BEKRAF), the Directorate of Film, Music, and New Media at the Ministry of Education and Culture, and the Indonesian Film Board (BPI), must work hand-in-hand with film businesses and film professional associations to hold educational programmes and workshops regarding intellectual property rights.

Collaboration between film and fashion industries should be strengthened by recognising actors' specific roles in developing Indonesia's creative economy. From the cases presented in this paper, we understand that creative industry sectors support each other. Film serves as a promotional tool, as well as potential inspiration for fashion products. The fashion industry, on the other hand, provides creative force, production resources, and distribution channels to the general public. Again, events where people from both industries can discuss potential collaboration are necessary.

Film industries must recognise that merchandising is a serious business, one that requires special effort and resources. Presently, the Indonesian film industry lacks the capacity to overcome the challenge of dedicating itself seriously to merchandising and other derivative sectors in the 'fashion' industry. Only a few companies have tried to implement an integrated business model that aims not only to increase their own profit, but also to enable other creative sub-sectors (especially SMSEs) to benefit from Indonesia's growing creative industry.

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