

Abstract

This study analyzes the development of the Nongsa Digital Park Special Economic Zone (KEK) as a representation of the dynamics of state-market relations in the industrialization of the digital economy in Indonesia. The power struggle of interests occurs in two phases: policy formulation and implementation. In the formulation phase, the state plays a dominant role through regulations, development visions, and the protection of national strategic interests, including data sovereignty. In the implementation phase, market actors gain greater bargaining power. These dynamics are analyzed through five indicators: *new developmentalism*: government intervention, the role of investment, the influence of the country's political economy, industrial policy, and the distribution of roles in infrastructure development. The industrialization of the Nongsa Special Economic Zone is capital-intensive, digital, and globally integrated, but limited in job creation and local business integration.

Keywords: Special Economic Zone, Nongsa Digital Park, State and Market, New Developmentalism, Digital Industrialization, Political Economy of Development

Abstrak

Penelitian ini menganalisis pengembangan Kawasan Ekonomi Khusus (KEK) Nongsa Digital Park sebagai representasi dinamika hubungan negara dan pasar dalam industrialisasi ekonomi digital di Indonesia. Tarik-menarik kepentingan berlangsung dalam dua fase, yaitu perumusan dan implementasi kebijakan. Pada fase perumusan, negara berperan dominan melalui regulasi, visi pembangunan, dan perlindungan kepentingan strategis nasional, termasuk kedaulatan data. Pada fase implementasi, aktor pasar memperoleh ruang tawar yang lebih besar. Dinamika ini dianalisis melalui lima indikator *new developmentalism*: intervensi pemerintah, peran investasi, pengaruh ekonomi politik negara, kebijakan industri, dan distribusi peran dalam pembangunan infrastruktur. Industrialisasi KEK Nongsa bersifat padat modal, digital, terintegrasi global, namun terbatas dalam penciptaan kerja dan integrasi usaha lokal.

Kata Kunci: Kawasan Ekonomi Khusus, Nongsa Digital Park, Negara dan Pasar, New Developmentalism, Industrialisasi Digital, Ekonomi Politik Pembangunan