

**Caroline Wong**

# **SINGAPOREAN FILM INDUSTRY IN TRANSITION:LOOKING FOR A CREATIVE EDGE**

The nature and role of intangible resources that shape  
an uncertain and changing environment such  
as the film industry

 **LAMBERT**  
Academic Publishing



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## ABSTRACT

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In the last two decades, despite much scholarly research devoted to film production, marketing, consumer behaviour and industry structure, very little attention has been accorded to factors that drive success in experiential products.

Creativity, experience and reputation are central to the study of organisations. This thesis identifies the nature and role of such intangible resources which are likely to contribute most in the uncertain and changing environment that shapes the film industry in Singapore. By determining the types of intangible resources, that enable the film industry to thrive, this research provides a valuable insight into the creative industries in an age when technological developments are integral to all stages of the value chain.

The thesis explores issues relating to competencies, policies and technology. It adopts a knowledge-based perspective, arguing that tacit knowledge often forms the basis of dynamic capabilities. Within the film industry, it is not uncommon that production houses<sup>1</sup> share tacit knowledge and ideas with one another so that they can build on their accumulated memories and experiences.

Singapore was chosen as the subject of the analysis for two reasons. First, a great deal of government attention is currently being directed to the film industry there. Film now represents an emerging industry in Singapore. From 1995 to 1999, an average of less than four local films was produced per year. Singapore aims to build a sustainable industry producing 10 to 15 films per annum in three to five years. This evokes comparisons with the 'golden age of cinema' in the 1950s and 1960s, when the combined average annual output for Malay films was about 18 features.

Second, the Singaporean government, responding to global developments, has recognised that creative industries, including the motion picture, television and digital media production industries are becoming powerful engines of economic growth. In recent years, efforts have been made to exploit the economic benefits of

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<sup>1</sup> In Singapore, production houses are companies that arrange film shoots and hire actors and they are usually managed by a managing director, general manager, producer or a director.

culture. Film is one of the contenders in the new era as Singapore seeks to rebrand its image from a conservative society to a 'new Asian creative hub' (ERC Report, September 2002, p.8).

This study shows how the film industry in Singapore is transforming. Singaporean film remains marginal in the global circuit of film production and distribution. Can it rise to become more recognised while delivering economic returns on creative investment?

Singapore's sociocultural advantages—its capacity to bring together Chinese, Malay, Indian and English language content—suggest opportunities for carving a niche in the film industry drawing on the more considerable success of the Hong Kong and Indian film industries.

Drawing on Curtin (2003)'s argument about the success of Bombay, Cairo and Hong Kong, which have become what he calls media capitals,<sup>2</sup> this study looks to the complex interactions of location, creativity, culture and polity. Curtin's media development model provides some insight into how Singapore might become the 'new Asian creative hub' of the 21<sup>st</sup> century and how it can transform its current technocratic image into a creative one.

During the golden age of cinema in the 1950s and 1960s, entrepreneurs such as Loke Wan Tho, who started Cathay Organisation, and the Rumne Shaw brothers, who started Shaw Organisation, fuelled the Asian film industry. Recently, the Media Development Authority (MDA)<sup>3</sup> was formed by the Singaporean government to assist the local film industry to grow. In that sense, the Singaporean film industry is in a state of transition, looking for a creative edge.

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<sup>2</sup> Media capitals represent centres or locations of media activity where complex forces and flows interact. They are meeting places where local specificity arises out of migration, interaction and exchange. For example, Hong Kong's claim to such status is crucially dependent on historical, cultural and institutional relations with places such as Guangzhou, Singapore and Taipei (Curtin, 2003)

<sup>3</sup> MDA is a statutory board of the Singapore Government that was formed in January 2003 as a result of a merger between the Singapore Broadcasting Authority, the Films and Publications Department and the Singapore Film Commission. Its mission is to develop Singapore into a vibrant global media city to foster a creative economy and connected society (See Appendix 7 for more details about the MDA).

This study argues that government interventionism, particularly through its censorship of the media industries, locates the film industry within an ‘architect model’ of cultural policy—that is, a short arm’s length model. This is further illustrated by its policy of targeted outputs—the number of films produced—rather than processes. Creativity has become serious business in Singapore.

The Singaporean film industry is therefore particularly interesting to observe at this point of development. While Singapore is identifying with an ‘Asian feel’ and is hoping to ride on its emerging film industry, at the same time it is hoping to exploit developments in digital technology. It is also cautiously adopting a ‘facilitator model’ of creative industries development, opting to dispense greater autonomy in the creative field.

The study reported in this thesis explores the opinions, attitudes and experiences of key decision-makers in the Singaporean film industry: feature filmmakers, independent filmmakers, animation filmmakers, government funding bodies and cultural institutions, private cultural institutions, film distributors and suppliers, and film training schools.

By examining the film industry from a knowledge-based perspective and taking into account intangibles, the study contributes to our understanding of management practices. In the process, it builds on previous contributions in this field and contributes to a better understanding of the creative industries.

The research also identifies other underlying factors for success in the film industry in Singapore. This study examines the aspirations and cultural policies of Singapore as well as the business and managerial aspects of filmmaking in the landscape of film success. An examination of the various success factors that enable the film industry to thrive allows us to understand the complexity of this industry at a time when digital technology is leading to a period of great change in the industry.

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## **Abbreviations**

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<b>AFC</b>	<b>Australian Film Commission</b>
<b>AFI</b>	<b>Australian Film Institute</b>
<b>CIWG</b>	<b>Creative Industries Working Group</b>
<b>DCMS</b>	<b>Department for Culture, Media and Sport</b>
<b>CGI</b>	<b>Computer-Generated Imagery</b>
<b>DTI</b>	<b>Department of Trade and Industry</b>
<b>DV</b>	<b>Digital Video</b>
<b>EDB</b>	<b>Economic Development Board</b>
<b>EAO</b>	<b>European Audiovisual Observatory</b>
<b>ERC</b>	<b>Economic Report Committee</b>
<b>FTA</b>	<b>Free Trade Agreement</b>
<b>GDP</b>	<b>Gross Domestic Product</b>
<b>GLCs</b>	<b>Government-Linked Companies</b>
<b>GV</b>	<b>Golden Village</b>
<b>HD</b>	<b>High-Definition</b>
<b>ICT</b>	<b>Information and Communication Technologies</b>
<b>IDA</b>	<b>Infocom Development Authority of Singapore</b>
<b>IP</b>	<b>Intellectual Property</b>
<b>KOFIC</b>	<b>Korean Film Council</b>
<b>MDA</b>	<b>Media Development Authority</b>
<b>MediaCorp</b>	<b>Media Corporation of Singapore</b>
<b>MICA</b>	<b>Ministry of Information, Communications and the Arts</b>
<b>MITA</b>	<b>Ministry of Information and the Arts</b>
<b>MTI</b>	<b>Ministry of Trade and Industry</b>



<b>MOU</b>	<b>Memorandum of Understanding</b>
<b>NAC</b>	<b>National Arts Council</b>
<b>NICL</b>	<b>New International Division of Cultural Labour</b>
<b>MNCs</b>	<b>Multi-National Corporations</b>
<b>NOIE</b>	<b>National Office for the Information Economy</b>
<b>OECD</b>	<b>Organization for Economic Corporation and Development</b>
<b>PAP</b>	<b>People Action Party</b>
<b>RBV</b>	<b>Resource-Based View</b>
<b>ROI</b>	<b>Return on Investment</b>
<b>SIFF</b>	<b>Singapore International Film Festival</b>
<b>SFC</b>	<b>Singapore Film Commission</b>
<b>STB</b>	<b>Singapore Tourist Board</b>
<b>UNDP</b>	<b>United Nations Development Program</b>
<b>WTA</b>	<b>World Teleport Association</b>



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## CHAPTER 1      INTRODUCTION

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### 1.1      Singapore: From Technological Hub to Regional Media Hub

In 1998, the box office takings of a homegrown Singaporean film, *Money No Enough* (1998), broke all local records for Chinese language films and even outdid Hollywood blockbusters such as *Independence Day* (1996) and *Twister* (1996). It became the third highest grossing film of all time after *Titanic* (1997) (S\$6.46 million) and *The Lost World* (2001) (S\$6.23 million) (Udhe & Udhe, 2000, p.127).

*Money No Enough* (1998) will be remembered as the first Singaporean film to become a huge commercial success during the revival decade of the film industry of the 1990s. It was a film that started the renaissance of Singaporean films. It catapulted Singapore's drive towards moviemaking by boosting the confidence of film investors in local production and gave the blueprint for box office success—comedy, usage of dialect (previously forbidden in the media during the years when Singapore was promoting the usage of Mandarin) and TV stars (iFilm: Asian and Pacific website).

Using a local crew of actors drawn from television comedies, the comedy *Money No Enough* (1998), written by Jack Neo, uses a smattering of Singlish (Singapore English) and Hokkien to make a realistic, easily identifiable drama about Singapore's obsession with money, how government policies have a taxing effect on people's income and the lengths to which Singaporeans go to get a good deal. The S\$850,000 film, which played to full houses for four months, raked in S\$5.84 million, making it the most commercially successful local film to date (Udhe & Udhe, 2000, p.126).

Echoing the success of *Money No Enough* (1998), this thesis examines the aspirations of a film industry starting from a low base and entering into a globally competitive world. It is also the story of a small nation, whose success in technology and commerce is well-known, attempting to make a mark in the creative industries. Since the 1990s, Singapore has been gradually transforming from an industrial, high-tech and educational metropolis into a cultural industries metropolis; it is a 'renaissance city' in the making (Chang, 2000; Gollodge, 2002).

Film is one of the creative industry 'contenders' staking a claim as Singapore seeks to re-brand its image from a conservative society to a new Asian creative hub (ERC Report, September 2002). The government envisions Singapore as a place where local, regional and international arts and culture will be displayed and consumed, a cosmopolitan city plugged into an international network, a place where the world's talents and ideas can converge and multiply (STB, 1996). The focus is on expanding local creativity in addition to attracting global creative personnel and retaining entrepreneurs (Goh, 2002).

This research therefore focuses on Singapore's transformation from a technocratic image to a creative one, revealing how Singapore is constantly negotiating its place in a rapidly globalising world.

## **1.2 Singaporean Cinema: Then and Now**

### **Multicultural Cinema in Singapore: 1920s–1940s**

Singapore has a long history of filmmaking dating back to the 1920s. This was a unique historical period, a time when filmmaking was part of a multiethnic and multicultural society that reflected the city's demographic and cultural variety (Udhe & Udhe, 2000). In 1923, the Shaw brothers (Runme Shaw and Run Run Shaw) arrived in Singapore from Shanghai to set up the Hai Seng Company. This later became the Shaw Organisation, one of two exhibition giants in Singapore. Loke Wan Tho, a rich businessman from Malaysia, started the other exhibition giant—the Cathay Organisation—in 1935.

Before World War II, filmmakers were mainly brought in from China to produce a number of Malay language films. After the war, the Shaw brothers employed Indian directors and technicians, who brought to Singaporean filmmaking an unmistakable Indian flavour (Udhe & Udhe, 2000). However, while Chinese businessmen financed most of the films made during this period, the acting talents were primarily Malayan and Indonesian and the films were marketed mainly in Malaya and Indonesia (Millet, 2006).

The first Singapore film, *The Immigrant*, or *Xin Ke*, was a Chinese film produced in 1926 by Liu Peh Jing, who wanted to make films for the Chinese immigrant

population in Singapore (Cheah, 2007). The first Malay feature film, *Laila Majnun*, was produced in Singapore in 1933 by the Motilal Chemical Company of Bombay and directed by BS Rajhans (SFC website). The success of this film convinced the Shaw Organization to enter Malay film production in 1940 to cater to the expanding markets in Malaya and Indonesia. During this period, a total of 22 films were made. There was also a demand for Chinese movies due to the large population of foreign born Chinese in Singapore and their increasing spending power. Most of the Chinese films were supplied from Shanghai and Hong Kong (Millet, 2006).

### **The Golden Age of Cinema: 1950s–1960s**

A ‘golden age of cinema’ occurred in the 1950s and 1960s, especially in Malay films. The Shaw Organization churned out about 10 movies per year while the Cathay Organisation averaged half this number. As such, in the early 1960s, the combined average annual output for Malay films was about 18 feature films<sup>4</sup> (Udhe & Udhe, 2000).

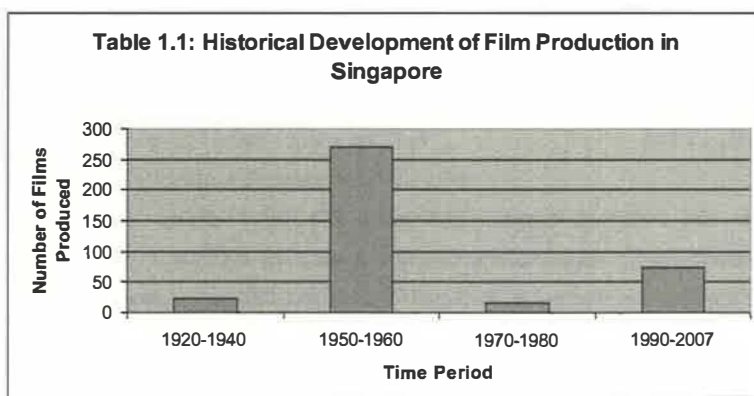
These two companies together made some 300 Malay language movies, which reportedly reached numerous ethnic communities (Udhe & Udhe, 2000). These post-war movies were directed by Indians, Filipinos and Malays but were financed by Chinese magnates (Tan et al., 2003). Along with Cathay and Shaw, Kong Ngee Company Ltd was the other important film studio. In 1955, Kong Ngee produced its first film, *Dragonet*, and went on to produce dozens of Teochew opera films and Hokkien dialect movies (Millet, 2006). The period following Singapore’s independence in 1965 saw a decline in film production. Eventually, Cathay and the Shaw Organisation both shut down in 1967 and 1972 respectively. The Shaw brothers decided to move their film business to Hong Kong, where the film industry was thriving and the film environment was free from government interference (Millet, 2006). Loke Wan Tho died in 1964 and the Cathay Organisation ended its operations in 1972 due to new challenges faced both in Hong Kong and Singapore, including competition from Indonesia. It then focused its attention to the exhibition and distribution businesses, which were thriving in Singapore (Millet, 2006).

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<sup>4</sup> A feature film is a term the film industry uses to refer to a film shot in the movie studio made for initial distribution in theatres. The Academy of Motion Picture Arts and Sciences, the American Film Institute and the British Film Institute all define a feature as a film with a running time of 40 minutes or longer. Source: <http://en.wikipedia.org/wiki/Independent>

### **The Slumber: 1970s–1980s**

During the next 20 years, the Singaporean government focused on developmental economics, emphasising strategies that stimulated export-driven economic growth and technological upgrading into science-based industrial production (Carnoy, 1998). The government did not try to revive the once vibrant filmmaking industry as film had no part to play in nation building. As a result, Singapore was probably the only country in South-East Asia without a filmmaking industry of its own in the 1970s and the 1980s. In the 1970s, Singapore produced less than 10 feature films a year (Cheah, 2002) (See Table 1.1 below). This was a big drop in production from the golden age, when more than 24 films per year were produced.



### **From Survival to Revival: 1990s–2007**

In 1987, the first Singapore International Film Festival (SIFF) was launched with the support of the Singapore Tourist Promotion Board (now Singapore Tourism Board, or STB), the Ministry of Community Development and the Economic Development Board (EDB). Its aim was to enhance film appreciation and stimulate interest in local filmmaking. It began with a modest programme of 53 feature films at the first SIFF. By the 12<sup>th</sup> SIFF in 1999, it featured a total of 305 films including 190 feature films and 115 short/video films.<sup>5</sup> The festival is well known for its focus on Asian cinema as half the films screened are from Asia (Cheah, 2002). The festival proved to be an important factor in spurring the creative drive of local film talent.

<sup>5</sup> Short films generally refer to films of between 20 and 40 minutes long. The festival statistics is compiled by the Singapore International Film Festival in Udhe & Udhe (2000), p.223.

According to Philip Cheah, the current SIFF director, the festival serves to broaden film appreciation in Singapore, build a platform for the Singaporean film industry and expose Singaporeans to the process of film through seminars and workshops (Udhe & Udhe, 2000).

The Singapore International Film Festival has proven to be one of the most important catalysts behind the revival of local production and the appreciation of many aspects of cinema (Udhe & Udhe, 2000). Eric Khoo, a renowned local scriptwriter and producer started off as an independent filmmaker who won the best Singapore short film entitled *August* in 1991 (Cheah, 2002). He later went on to produce feature films such as *Mee Pok Man* (1995), *12 Storeys* (1997) and *Be With Me* (2005).

The impetus continued into the 1990s with the rise of the knowledge economy. The government's efforts to expand the service sector included identifying filmmaking as a service industry and a potential economic growth area. During this period, Singapore saw a gradual re-emergence of local commercial filmmaking activities. This began with *Medium Rare* (directed by America's Stan Barrett and Britain's Arthur Smith) in 1991 which reportedly revealed a lack of local filmmaking talent and related professional expertise (Tan et al., 2003). Four films were released in 1998 without government funding. The success of two local films—namely, the aforementioned *Money No Enough* (1998) by Jack Neo, which grossed S\$5.84 million in four months, and *Forever Fever* (1998) by Glen Goei—spurred the confidence of film investors. This resulted in a record number of domestic productions (eight feature films) in 1999 (Ng, 2002).

*Forever Fever* (1998) achieved international commercial success by having its world rights picked up by Miramax films. The film, which featured the heyday of disco in Singapore, features many hit songs from *Saturday Night Fever* (1977). The story was told in a mix of English and Hokkien. A film touted as Singapore's answer to *Strictly Ballroom* (1992), *Forever Fever* (1998), has been picked up by the Australian company Beyond Films, which had bought the movie's distributing rights

for Australia and New Zealand and took the movie to the Cannes film festival<sup>6</sup> market (Urban, 1998). There it caught the attention of United States (US) distributing company Miramax Films. Not only did Miramax buy *Forever Fever's* (1998) distribution rights for Britain, the US and Canada, it also signed up director Goei for a three-picture deal over a five-year period (The Hollywood Reporter, June 9, 1998).

The combined successes of *Money No Enough* (1998) and *Forever Fever* (1998) generated much local media hype as they were two of the most commercially successful films made. In that same year, the Singapore Film Commission (SFC) was inaugurated with a mission to fund and support Singapore films (see Appendix 7 for more information about the SFC).

Since 2000, there has been a 50 per cent increase in the number of locally made films. The success of Jack Neo's *I Not Stupid Too* in 2006 and Roystan Tan's *881* in 2007 has brought renewed confidence regarding the future of Singaporean films. These two films captured the imagination of local audiences. The box office raked in close to S\$4.18 million and S\$3.4 million respectively (Channelnewsasia.com, September 6, 2007). The movie *881* (2007), which features the boisterous 'getai' (song stage) scene during the annual Hungry Ghost Festival, is arguably one of the most poignant films. It resonates with the local audience and has been selected for screening at the Gala Presentation section of the 12th Pusan International Film Festival in South Korea. Another success in 2007 was the movie *The Home Song Stories* (2007), co-produced jointly by Australia's Big and Little Films and Porchlight Films with Singapore's MediaCorp Raintree Pictures<sup>7</sup>. It received eight awards at the 2007 Australian Film Institute (AFI) awards, five for the 2007 Inside Film Awards and two awards for the Golden Horse Awards (Channelnewsasia.com, December 8, 2007).

Flow-on effects have occurred in the area of film industry financing resulting in a

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<sup>6</sup> The Cannes Film Festival founded in 1939, is one of the world's oldest, most influential and prestigious film festivals. The private festival is held annually (usually in the month of May) at the Palais des Festivals et des Congrès in the resort town of Cannes in the south of France.

<sup>7</sup> MediaCorp Raintree Pictures is the film production arm of MediaCorp Group, the most extensive government-controlled media broadcaster and provider in Singapore.



rapid expansion in the number of multiplexes<sup>8</sup> (Udhe & Udhe, 2000) in the 1990s together with the establishment of Picture House (a cinema that screens art house<sup>9</sup> movies). A mix of art house and commercial movies has contributed to the revival of the domestic film production industry. From this perspective, the government's efforts to expand the services sector have included the identification of cinema as a potential growth area. The government is hoping Singapore can become a regional hub for international film production and distribution. To facilitate this vision, state-of-the-art media production and post production facilities have been developed.

The current filmmaking revival came about through a combination of initiatives from both the public and private sectors, including entrepreneurs and government policy. Public policy in Singapore reflects what has been termed an 'architect model', with a mix of the patronage and facilitation models (Hillmand-Chartrand & McCaughey, 1989). Hillmand-Chartrand & McCaughey (1989) describe these models of relationship between governments and the cultural sphere as ideal types of cultural policy. These models of cultural policy funding will be further illustrated in chapter 3.

The architect model directly funds the arts and entertainment through a Ministry or Department of Culture. It allows government a direct role in shaping the environment and is to some extent interventionist (Hillmand-Chartrand & McCaughey, 1989). Overall, cultural policy in Singapore tends to focus more on outputs and how to turn the sphere of arts and culture into marketable components extending to tourism, business entertainment and the international representation of a particular national culture. Fitting into the state-directed architect model, Singapore's cultural policy is less concerned about the creative process, which is the focus of the patron and facilitator models.

The thesis will argue that there is a need to move to a more dynamic developmental model, one that supports the growth of actual communities (rather than to a

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<sup>8</sup> A multiplex is a large cinema complex with many (e.g. more than five, and often over ten) movie theatres.

<sup>9</sup> An art house film or an independent film is a typically serious, non-commercial, independently made film that is aimed at a niche audience rather than a mass audience. Art film producers usually present their films at specialty theatres (repertory cinemas, or in the US "art house cinemas") and film festivals. Source: [http://encarta.msn.com/dictionary\\_1861685559/art\\_film.html](http://encarta.msn.com/dictionary_1861685559/art_film.html).

relatively abstract, centralised state) and one where the creative industries are viewed as an element of the innovation system of the whole economy (Cunningham & Potts, 2007). The innovation system approach is seen most clearly in the way Singaporean public policy has targeted the biotechnology, biomedical and nanotechnology sectors in Singapore. Models of public policy will be discussed further in Chapter 3.

### 1.3 Formula for Success

What accounts for the success of Singaporean films such as *I Not Stupid* (2002) and *888* (2007)? What are the critical success factors<sup>10</sup> in the industry? Giving the audience what they want? Like many creative industries, the problem for the film industry is that people often do not know what they want until they see it. According to Caves (2000), the sunk cost of film, like many creative industries, is risky as both sellers and buyers have little symmetric information about the satisfaction and utility of the product. Sunk costs are costs that have been incurred and which cannot be recovered to any significant degree. They include upfront costs of making a film and advertising that financiers have no guarantee of recouping. Often, production budgets are based on an assessment of a script and the identity of some key people (producer, scriptwriter, director and actors) without any prior knowledge about the likely market outcomes in the specific project (Hoskins et al., 1997).

This gives rise to a property that Caves (2000) termed ‘nobody knows’, which refers to the fundamental uncertainty that faces the producer of a creative good. Producers know a lot about what has succeeded in the past and they constantly try to extrapolate this knowledge to the project at hand, but at times these efforts achieve minimal predictive value (Goldman, 1984). This basic economic property of ‘nobody knows’ underpins the way creative industries work, which distinguishes the film industry from other economic sectors (see DiMaggio, 1977; De Vany & Walls, 1999).

Moreover, it is often difficult to discern the role played by intangibles and

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<sup>10</sup> The concept of success factors was first developed in 1961 by D. Ronald Daniel of McKinsey & Company. It was further refined and popularised by Jack F. Rockart in the 1980s. They represent some features of the internal or external environment of an organisation that has a major influence on the achievement of the organisation’s aims. Source: Daniel, D. Ronald, ‘Management Information Crisis’, *Harvard Business Review*, Sept.-Oct., 1961

competencies in generating economic returns. While filmmaking is primarily about communicating ideas, images and experiences to consumers, its economic value lies in the subjective interpretation of meaning (Bilton, 2007). A combination of many diverse, specialised skills and competencies is needed to create and apply knowledge (DeCarolis & Deeds, 1999; Miller & Shamsie, 1996) in order for distinctive content to be produced. In many instances, technical and creative expertise is needed to develop the competitive products and to market them successfully (DeFillippi & Arthur, 1998). On the whole, value networks and relationships drive the industry between producers, consumers and intermediaries (Bilton, 2007).

Firms in the industry exploit such knowledge to find organisational forms and develop competencies that enable them to defray the extreme uncertainty of demand in the market. In the case of the Singaporean film industry, there has been much written about the historical development of films and cinema (See Uhde & Uhde, 2000; Millet, 2006) and the economic and cultural impact of creative industries in Singapore (Toh et al., 2002; ERC Report, September 2002). The research literature and a preliminary study of the Singapore film industry by this author suggest that there has been little research at the firm or industry level to gauge firm performance and industry characteristics.

The Singaporean film industry, like the games industry, is an emerging, immature sector that did not really receive much attention from policymakers in Singapore until the 1990s. There is consequently a lack of consistent longitudinal data about firm performance and industry characteristics. Policymakers and practitioners are only just starting to confront the issues and opportunities surrounding this industry. It is a well-known fact that media industries are very much governed by regulation in Singapore and that the government can act as an influential enabler by establishing institutions and policies that foster the growth of media industries (Curtin, 2007).

Singapore wants to maximise its competitive advantage using the film industry. In particular, it will use its strategic position in the heart of Asia, its multiracial composition as well as its extensive range of media service capabilities. These services including renowned media schools, such as the Asian campus of the New York University Tisch School of the Arts and the Sheridian College from Canada,

were established in Singapore in the last two years. These objectives were clearly articulated by the Singaporean Minister for Information, Communications and the Arts, Dr Lee Boon Yang, in November 2004:

Mr George Lucas, who recently established Lucasfilm Animation Singapore, explained that his studio in Singapore would enable his company to create a new style of animation by blending eastern and western styles or fusion! Asia's diversity of cultures and wealth of heritage is clearly an invaluable asset. The challenge is to deploy this cultural capital and launch a new distinctive "Asian feel" in our lifestyle, products and services. By deploying cultural capital and riding on rapid technological development in the context of huge investment flow and explosive consumer growth throughout Asia, we will be able to create tremendous value and new employment opportunities for Asian people.

Singapore's sociocultural advantages—its capacity to bring together Chinese, Malaysian, Indian and English language content—suggests opportunities for Singapore to carve a niche in the film industry while drawing on the more considerable success of the Hong Kong and Indian film industries. Although Singapore identifies with an Asian aesthetic and hopes to ride on its emerging film industry while exploiting developments in digital technology, the question remains whether this aspiration is too parochial, optimistic or narrow to turn around its fledging film industry.

As mentioned earlier, government interventionism locates the film industry within an architect mode' of cultural policy, particularly through its censorship of the media industries, which is a short arm's length model. This interventionist approach is further illustrated by its policy of targeted outputs—the number of films produced—rather than processes. By what processes or structures can government encourage the development of competencies such as creativity, reputation and experience, which are needed to communicate ideas, images and experiences to the consumers in the filmmaking industry?

Singapore seems to be suffering from localism, although in recent years it has been cautiously adopting a 'facilitator model', opting to dispense greater autonomy within the creative field. One issue addressed in this thesis is whether the forging of international co-productions, with the Singaporean government playing an active role in bringing foreign partnerships to local production houses, will be a way

forward for the Singapore film industry.

Drawing on Curtin (2003)'s argument about the success of Bombay and Hong Kong, cities that have become 'media capitals', this research looks at the dynamism and complexity of the film industry in Singapore. It focuses on the interactions of location, creativity, culture and polity within the historical, cultural and institutional relations of the nation state. Curtin's media development model provides some insight into how Singapore might become the new Asian creative hub of the 21<sup>st</sup> century and how it can transform its current technocratic image into a creative one. This model will be further explored in Chapter 2, where Hong Kong's experience as a media capital will be highlighted. Likewise, research suggests that Singapore can learn from regional neighbours like South Korea and India.

The revival of the Singaporean film industry will require creative champions, however. During the golden age of cinema in the 1950s and 1960s, entrepreneurs such as Loke Wan Tho, who started Cathay Organisation, and the Shaw brothers, who started Shaw Organisation, fuelled the Asian film industry. In 1998, the Media Development Authority (MDA) was formed by the Singaporean government to develop Singapore into a vibrant global media city. Film is one of the industries that have been targeted for growth. In that sense, the Singaporean film industry is in a state of transition, looking for a creative edge.

In summary, the Singaporean film industry and its resurgence are particularly interesting to observe at this point of development. Singapore is identifying with an 'Asian feel' and hoping to develop its emerging film industry while exploiting developments in digital technology. At the same time, it is cautiously adopting a 'facilitator model' of creative industries development by encouraging greater autonomy from firms working in the field.

#### **1.4 Doing More with Less**

Singapore is looking for success in uncertain waters. After looking back to a golden age in the film industry, it is now aspiring to recapture a position in a highly competitive but lucrative market. How does a small, non-performing film industry reclaim a leading position?

To understand how Singapore successfully develops (or fails to develop) its competitive advantage in the film industry, this study examines the ways in which Singapore's cultural policies embrace the turn towards creativity in a knowledge-based economy. New ideas and technologies are becoming the drivers of economic growth. In this confluence of knowledge and human capital, creative industries increasingly play an important role in the innovation of the economy (Potts, 2007).

Given that the general aim of the study is to examine the role of the creative industries in Singapore's new innovation model, firms in the film industry were chosen as the unit of analysis. Firms in the industry are popularly termed 'production houses' or 'production companies' by practitioners in the field. Topics of analysis were identified as practical issues that affect the success of the firms, such as intangibles and creative inputs at each stage of the value chain as well as the way new technologies (such as digital technology) are being handled and coordinated to bring about change.

### **1.5 Research Questions**

With these overall objectives, the research focuses on three key questions:

1. What are the aspirations of Singapore and its cultural policies in the landscape of film success?
2. How significant are intangible factors in Singapore's aspiration for success in the film industry?
  - a. What are the indicators for success in Singapore's film industry?
  - b. How can the Singaporean film industry improve on its performance?
3. What is the role of digital technology in shaping the film industry in Singapore?
  - a. What are the implications of digital films for Singapore in its transition to a creative economy?

### **1.6 Research Scope and Focus**

The research aims to identify the factors underlying the success of the film industry in Singapore. Examining the types of resources, especially the intangible ones that enable the film industry to thrive, develops our understanding of the complexity of this industry at a time when digital technology is leading to a period of great change in it. The study adopts a knowledge-based perspective and argues that tacit

knowledge often forms the basis of dynamic capabilities. Within the film industry, it is not uncommon that tacit knowledge and ideas are shared among production houses such that they can build on their accumulated memories and experiences (Bilton, 2007). This study also examines the business and managerial aspects of filmmaking that contribute to its success in Singapore.

Film has the characteristics of both a service and an experiential product<sup>11</sup>. Its value is primarily dependent upon the perceptions of the end users (viewer, audience, reader and consumer) as much as on the creation of original content (Bilton & Leary, 2002). The complexity of the film industry is illustrated by the unpredictable and asymmetric relationship between production and distribution. The volatility and complexity of the industry merits serious study of the creative economy.

This research will draw on the works of Bilton (2007), Bilton and Leary (2002), Caves (2000), Curtin (2003, 2007), DeFillippi and Arthur (1998), De Vany (2004), Miller and Shamsie (1996), Pratt and Gornostaeva (2005), Scott (2004), Storper and Christopherson (1987) and Kong (2000, 2005).

Policymakers in Singapore tend to focus on the size (e.g., the number of films produced) and growth (e.g., box office returns) rather than the processes that drive innovation and creativity in the film industry. According to Bilton (2007), the value of creative industries is measured not in terms of economic wealth and development but by value networks and relationships among products, consumers and intermediaries. Curtin (2003) concurs that social and cultural forces influence the emergence of global media capitals such as Hong Kong and Chicago. These are centres of activity where negotiation, contention and even competition exist. Curtin looks at media capitals as places where there is a concentration of resources, reputation and talent (Curtin, 2003).

An insight into the film industry will facilitate our understanding of the creative industries as an emergent, innovative part of the services sector of the economy and not just another business (Cunningham & Potts, 2007). It is about a process of

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<sup>11</sup> According to Eliashberg & Shugan (1997), films are intangible objects consumed for pleasure rather than for the maximization of an economic profit. That is, movie consuming may be induced not by financial profits or utility, but by experiential profits or utility.

organising creativity and managing creatively (Bilton, 2007). This is where institutional factors such as policies and legislation can impact on the business of creativity in the film industry. The models of funding suggested by Hillmand-Chartrand and McCaughey (1989) and the specific film industry strategy of assisting co-productions through government policy will be examined. Curtin's concept of media capital (2007) will also provide a grounded analysis of the dynamism and complexity of the film industry.

### **1.7 Research Methodology**

Given the aim of the thesis, which is to understand the processes underpinning a successful film industry in Singapore, a qualitative research methodology (Yin, 2003) was adopted. This approach involved an exploration of the opinions, attitudes and experiences of a range of key decision-makers, industry support bodies and practitioners in the industry. It drew on a broad range of Singapore's key industry figures, including feature filmmakers, independent filmmakers, animators, government funding bodies and cultural institutions, private cultural institutions, film distributors and suppliers as well as film training schools. The Singaporean government has a significant role to play in providing funding and other support. Targeting a broad, diverse group, including government representatives, rather than film producers alone meant that the data collection would yield worthwhile and more general perspectives about industry performance.

While the subject matter did not require the use of a methodology that leads to generalisable and quantifiable outcomes, three main tools were used to produce meaningful research outcomes from qualitative research, namely:

1. In-depth interviews with major film production houses as well government representatives
2. An online questionnaire (ANU Apollo) with a mix of closed and open-ended questions
3. Secondary data collection of published commentary and analysis linked to the production houses and film industry in Singapore. Sources include archival material, such as newspapers (online), press releases from government agencies and ministries, trade magazines, book publications, web sites of production houses and relevant agencies and institutions in Singapore.



The case study method provides a rich description of an actual situation. This in-depth description enables the researcher to improve our understanding of complex phenomena (see Kaplan, 1996). The film industry is subject to high risk and extreme uncertainty (De Vany, 2004). It competes in a challenging and complex environment shaped by technological and knowledge development (Hitt et al., 1998). The case study method enables an investigation of the range and breadth of firm behaviour in an industry and provides an exploratory and descriptive understanding of the context and setting (Marshall & Rossman, 1995) necessary to generate propositions.

In addition, case study research involves an exploration of subject areas where existing knowledge is limited (Cavaye, 1996). For example, many poorly understood organisational, environmental, social, cultural and policy issues affect the film industry. Research questions associated with these issues are best examined using a methodology that considers the context within which the case—in this instance, the film industry—is situated.

### **1.8 Contribution of this Research**

This study makes an important contribution to applied and theoretical research as it seeks to demonstrate how the film landscape in Singapore is shaped by multidimensional factors that will affect the way production houses are evaluated and improved over time. So far, few studies have examined the dynamism and complexity of the film business in Singapore, especially in the area of intangible competencies (reputation, experience and creativity), digital technology and the interaction of institutions, agencies, markets and the public.

Theoretically, this study demonstrates the usefulness of viewing the film landscape from a media capital development model lens. This approach considers the complex pattern of flows relating to not only resources, reputation and talent but also historical, cultural and institutional relationships and linkages to other places. The relational concept of media capital that exists locally, regionally and globally provides an insight into how the Singaporean film industry, which is currently on the periphery of the Asian film scene, can aspire to be at the centre of the creative flow. From the firm perspective, a knowledge-based view of competencies is a useful paradigm for analysing firm performance. This research focuses on the role and nature of three knowledge-based competencies, such as reputation, experience and

creativity. Its findings will enrich the study of intangible competencies, which are a source of firm wealth and competitive advantage. It will also provide a descriptive understanding of the context and setting of firm behaviour in the Singaporean industry. This will allow the generation of propositions that can be investigated in film industries elsewhere which are undergoing similar changes forged by high definition digital technologies.

This study will also produce a series of practical recommendations that may be useful for policymakers and industry practitioners in managing the film and animation industry in Singapore. For example, it finds that the architect model of cultural policy, where government interventionism is prevalent—particularly through media industry censorship and a policy of quantified film output targets—does not work particularly well for the creative industries. There is a need for greater autonomy in the creative field, where industry practitioners are given time and space to develop their ideas, knowledge and creativity. For policymakers, this argument may require a complete change of focus, where economic competitiveness is served by a liberal cultural policy rather than the conventional policy of building infrastructure, subsidising business research and development and supporting local spin-offs. The creative economy of Singapore has to be examined through a broad multidisciplinary perspective rather than a reductionist, engineering-based or systems approach.

## **1.9 Chapter Outline**

Chapter 2 provides a review of the relevant literature. It links the development in film production to the growth of the cultural and creative industries. It explores some basic economic properties and characteristics that underpin the organisation of the creative industries in order to highlight the relevance of intangible competencies in a complex and uncertain industry such as the film industry. Three conceptual perspectives—the resource-based view, the dynamic capabilities perspective and the knowledge-based view of the firm—are considered in light of the unique properties and characteristics that underpin the organisation of the film industry.

Chapter 2 also highlights the global perspective of the film industry. The rise of the Asian film industry is explained using the examples of India, South Korea and Hong Kong. The position of the Singaporean film industry is considered in light of this

development. The literature on technological developments that have become integral to the film industry, especially in the areas of production and distribution, is also discussed. This indicates that, at the micro level, a knowledge-based view of competencies can serve as a useful paradigm for analysing firm performance in the film industry by focusing on the role and nature of these competencies. At the meso level, the literature review demonstrates the usefulness of viewing the film industry from a multidimensional perspective which takes into consideration the complex pattern of flows relating to not only the environment (e.g., digital technology) but also historical, cultural and institutional factors that shape the industry.

Chapter 3 provides a backdrop for understanding the economic model adopted by Singapore that has played a major role in the development of the city state since its independence in 1965. It also focuses on the latest stage of Singapore's economic development in the 21<sup>st</sup> century, a time when Singapore has been redefining its image and identity and creative industries have received the endorsement of the government. In summary, the history of the Singaporean film industry is considered from its development prior to Singaporean independence through to the current era.

Chapter 4 outlines the research paradigm and justification for the qualitative methodology used in the study. It discusses the interview protocol and overall research methodology, including sampling design and analysis procedures. Ethical considerations and possible study limitations are also highlighted in this chapter.

Chapter 5 lays the groundwork for the analysis of the research questions by providing responses from the semi-structured interviews and the survey questionnaires in light of the practical issues discussed in Chapter 1. The responses indicate the views of the practitioners in the field in relation to what counts for competitive advantage in the industry—the intangible competencies that take time and effort to grow and require an environment in which to flourish.

The findings also indicate that technology is only an enabler for all such kinds of competencies to take effect in the firm. However, firms still need to take into consideration the changing environment (such as technological advancement and changing consumer needs) that will impact on the business aspects of the industry. This is the balance that production houses have to tread in order to stay competitive

in the industry.

Chapter 6 provides a synthesis of the findings by drawing attention to the need for a more robust understanding of the types of competencies that produce distinctive creative content underpinning the film industry. There is recognition that tacit knowledge in the form of ideas forms the basis of dynamic competencies for the production houses as this enables them to build on their accumulated memories and experiences. This chapter also analyses the impact of digital technology on the success of the film industry. The findings lead to several propositions that are indicative of the competitive edge of the film and animation industry. The discussion also unveils the significance of the business aspects of the industry and highlights the practical aspects of management practices and insights that will make for a successful film industry.

Chapter 7 concludes the dissertation by providing a brief summary of the findings as they relate to the three research questions listed in this chapter. It also highlights the limitations and contributions of research into the film industry in Singapore. The thesis concludes by noting a number of emerging opportunities for future research.

## **1.10 Conclusion**

This study opens a window of discovery into what the practitioners in the Singaporean film and animation industry have to say about what counts for competitive edge in their industry. It focuses on intangible competencies in the industry and the wider cultural and aesthetic development of Singapore, which includes a complex system of institutions, agencies, markets and consumers.

The next chapter describes the nature and characteristics of intangible competencies that are likely to contribute most in an uncertain, changing and unpredictable environment such as the Singaporean film industry. It draws upon three different theoretical approaches—namely, the resource-based view, the dynamic capabilities perspective and the knowledge-based view—to illuminate the types of intangible competencies that enable production houses in the film industry to stay competitive in the contemporary economy.

The research explores issues relating to competencies, policies and technology. It adopts a knowledge-based perspective, arguing that tacit knowledge often forms the basis of dynamic capabilities. This study shows how the film industry in Singapore is transforming. Singaporean film remains marginal in the global circuit of film production and distribution. Can it rise to become more recognised while delivering economic returns on creative investment? By examining the film industry from a knowledge-based perspective and taking into account intangibles, the study contributes to our understanding of management practices. In the process, it builds on previous contributions in this field and contributes to a better understanding of the creative industries. The research also identifies other underlying factors for success in the film industry in Singapore. This study examines the aspirations and cultural policies of Singapore as well as the business and managerial aspects of filmmaking in the landscape of film success.



**Caroline Wong**

My current research focus is on managing intangible resources and competencies (such as creativity, reputation and experience) that have increasingly become the sources of competitive advantage in the new economy. My areas of research include sectors in the creative/cultural industries with particular interest in the film industry.



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