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Reframing Film in Brunei Darussalam: From Cultural Expression to Emerging Economic Activity

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Reframing Film in Brunei Darussalam: From Cultural Expression to Emerging Economic Activity

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Abstract

Brunei Darussalam's ongoing efforts towards economic diversification under *Wawasan Brunei 2035* have increasingly drawn attention to the role of the creative industries as alternative sources of growth. Within this context, film has emerged as a visible yet underexplored area of activity, often perceived primarily as cultural expression rather than as a form of economic production. This paper reconsiders Brunei's film sector through the lens of small nation cinema and the creative economy, moving beyond conventional definitions of industry based on scale and profitability. Drawing on qualitative insights from interviews with local filmmakers and institutional stakeholders, alongside supporting survey data, the analysis focuses on three key dimensions: production activity, labour and skill development, and market circulation. The findings show that Brunei's film sector already demonstrates emerging forms of structured production, contributes to human capital development and engages in evolving modes of content circulation. However, these developments remain constrained by fragmented institutional support, limited market coordination, and uneven audience engagement. Rather than indicating an absence of industry, these conditions reflect a misalignment between institutional efforts, industry practices, and audience expectations. In this sense, Brunei's film sector can be understood as an emerging system in formation, where cultural production and economic functions are already present, but not yet fully integrated into a sustainable industry aligned with the country's broader diversification goals.

Keywords: Brunei Darussalam; Film Industry; Creative Economy; Small Nation Cinema; Economic Diversification; Cultural Industries; Wawasan Brunei 2035.

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Introduction

Brunei Darussalam is a small, independent country governed under an Islamic Monarchy with a developing economy that has historically been heavily dependent on its oil and gas production since the 1920s. While the sector continued to play a significant role, recent data indicates a gradual shift towards diversification, with the non-oil and gas sector now accounting for over half of GDP (Centre for Strategic and Policy Studies, 2025). This shift highlights the increasing importance of developing alternative, knowledge-based sectors as part of the country's long-term economic strategy of *Wawasan Brunei 2035*. [1]

Within this broader agenda, the creative economy has emerged as an area of growing policy interest. Encompassing sectors such as arts, design, media, and entertainment, the creative industries are widely recognised as contributors of innovation, employment, and new forms of economic activity. Globally, these industries have demonstrated strong growth potential, offering smaller economies opportunities to diversify into high-value, knowledge-based sectors (UNCTAD, 2010). In Brunei, this has translated into increasing policy attention and initiatives aimed at supporting the development of creative sectors, including film and media. Institutions such as Radio Television Brunei (RTB) and the Authority for Infocommunications Technology Industry of Brunei Darussalam (AITI) play important roles in supporting media and content production, talent development, and digital distribution. AITI has further supported the development of the local creative industry through its *Pitch & Produce* programme, an initiative designed to stimulate growth within Brunei's broadcasting and multimedia sector. The programme invites registered local production companies to submit

[1] Wawasan Brunei 2035 (Brunei Vision 2035) is a national development plan launched in 2007 by Sultan Hassanal Bolkiah. Its primary goal is to transform Brunei into a nation widely recognized for its educated and highly skilled people, a high quality of life, and a diversified, dynamic, sustainable economy.

proposals for original television and digital content, which are evaluated by industry experts. Successful applicants receive seed funding to develop and produce their projects, providing local creators with practical opportunities to gain production experience and commercial exposure. The programme also seeks to increase the availability of high-quality Bruneian content on OTT platforms, generate employment for freelancers, encourage partnerships with local businesses, and strengthen the sustainability of the domestic creative ecosystem. At the same time, high levels of digital connectivity and social media usage have made it easier for individuals to create and share content, contributing to a more active creative landscape.

In 2025, during the 21st Legislative (LegCo) Council meeting, Minister at the Prime Minister's Office and Minister of Defence II Yang Berhormat Pehin Datu Lailaraja Major General (Rtd) Dato Paduka Seri Haji Awang Halbi bin Haji Mohd Yussof reaffirmed the government's commitment to strengthening the creative industry in Brunei, highlighting the importance of collaborative initiatives involving multiple stakeholders, particularly Radio Television Brunei (RTB), in advancing the sector. These efforts reflect a growing recognition of the creative economy as part of the country's broader development strategy.

> *"The government continues to extend its efforts in empowering the creative industry, with a particular focus on expanding its reach to citizens and stakeholders. RTB, in particular, has been instrumental in uncovering new talents in the arts, creative, and broadcasting sectors, as we transition from traditional platforms like radio and television to digital mediums such as social media and music streaming services."*

Despite this increasing policy attention and digital expansion, the creative sector in Brunei remains at an early stage of development. Existing studies suggest that participation in creative activities in Brunei has grown, particularly among younger practitioners engaged in digital content creation and self-branding practices (Mohamad, 2020). At the same time, the sector's overall economic contribution remains relatively limited, shaped by structural challenges such as limited industry coordination, small domestic market and fragmented institutional support (Lopes & Aliudin, 2019). This highlights a gap between policy ambition and the consolidation of creative industries within the national economy.

Within this broader landscape, film has emerged as a visible and evolving area of activity. Local productions, training initiatives, and digital distribution platforms have contributed to increasing participation among filmmakers and audiences. Film-related activities also generate forms of economic engagement, including employment opportunities,

skill development, and entrepreneurial practices across production processes. Despite this, filmmaking in Brunei continues to be widely perceived as informal, sporadic or hobby-based, rather than as part of a structured economic sector. This tension reflects a broader issue in small nation contexts, where conventional definitions of a film industry, typically associated with large-scale production, established infrastructure, and commercial viability may not adequately capture emerging or developing sectors. As a result, film activity in Brunei risks being understood primarily as cultural expression, rather than as a form of economic participation.

This paper addresses this gap by examining Brunei's film sector through an economic lens. Rather than asking whether Brunei possesses a conventional film industry, it focuses on how film activity functions within the local context. Drawing on a functional analytical framework, the study evaluates three key dimensions: production activity, labour and skill development, and market circulation. Through this approach, it assesses the extent to which the sector already performs the economic functions associated with an industry.

Accordingly, the paper argues that Brunei's film sector should be understood as an emerging economic system that, while structurally incomplete, already demonstrated tangible contributions to employment, skill development, and creative entrepreneurship. However, its development is constrained by a misalignment between institutional support, industry practices, and audience engagement, which limits its recognition and consolidation as a sustainable industry. Addressing this misalignment is essential for positioning the film sector as a meaningful contributor to Brunei's broader economic diversification goals under *Wawasan Brunei 2035*.

Conceptual and Contextual Framework

Understanding Brunei's film sector requires situating it within overlapping strands of literature, including research on small nation cinema, the creative economy, and the structural constraints faced by small media markets. While limited in scope, existing scholarship provides useful frameworks for examining how film activity in smaller states can be understood beyond cultural practice, particularly in relation to its economic potential.

Film industries in small nations are often characterised by limited domestic markets, constrained resources, and fragmented production structures. Rather than evaluating such

industries based on scale or profitability, scholars argue that small nation cinema should be understood through its ability to sustain production practices, cultural expression, and institutional support (Hjort & Petrie, 2007; Hjort, 2010). These industries frequently operate within conditions of structural dependency, relying on state support, international collaboration, and alternative distribution channels to maintain visibility (Elsaesser, 2005). As a result, industry formation is often incremental and uneven, shaped by both constraints and adaptive practices.

Within this context, film's role in the creative economy becomes particularly significant. The creative economy framework views cultural production including film, media, arts, and digital content as a contributor to employment, innovation, and economic diversification. Research in Southeast Asia highlights how these sectors can generate both direct and indirect economic value, particularly when supported by appropriate policies and institutional frameworks (Fatmawati, 2025). Direct contributions include employment opportunities and revenue generation, while indirect benefits include skills development, entrepreneurship, and cultural branding. Film, in particular, operates within a broader ecosystem that extends beyond production to include distribution, circulation, and related industries, demonstrating how its economic value is not limited to mere box office performance. One such example is film-induced tourism, where films influence audience perceptions of locations and contribute to tourism demand. Studies demonstrate how film can generate long-term economic impact, as seen in locations like Matamata, New Zealand, following *The Hobbit* trilogy. These examples show how film can create value beyond immediate financial returns when integrated into broader economic strategies (Li et al., 2017).

Despite the recognised potential of creative industries, small media markets continue to face structural constraints that limit their development. These include limited financial resources, small domestic audiences, and restricted access to distribution channels. These constraints make it difficult for film sectors in smaller countries to sustain consistent production or compete within global distribution systems. Zemaityte (2025) emphasises that such challenges are both economic and structural, often resulting in project-based production and struggles to develop long-term stability. Similarly, the absence of established infrastructure and professional networks can hinder the development of sustainable industry systems as smaller industries often rely heavily on government funding, co-productions, or short-term projects rather than stable commercial systems (Hjort & Petrie, 2007).

These dynamics are particularly relevant in the case of Brunei. National policy frameworks such as *Wawasan Brunei 2035* have increasingly recognised the importance of creative industries in supporting economic diversification. Government initiatives and institutional support, including those led by RTB and AITI, reflect growing engagement with the sector. At the same time, existing scholarship highlights that Brunei's film sector operates at the intersection of cultural expression and emerging economic activity. Liu (2021) describes it as a form of cultural enterprise, while Chin & Liu (2018) points to its broader economic potential despite its limited scale. However, support remains fragmented across multiple institutions, raising questions about the sector's ability to develop into a more coordinated and sustainable industry (Lopes & Aliudin, 2019).

While these studies provide valuable insights, limited attention has been given to how film in Brunei functions specifically as an economic activity. Much of the existing research focuses on cultural representation or policy frameworks, rather than examining the processes through which film activity is produced, sustained, and circulated. This study addresses this gap by adopting a functional analytical framework focusing on production activity, labour and skill development, and market circulation. In doing so, it offers a more contextually grounded understanding of Brunei's film sector as an emerging system of economic activity shaped by both structural constraints and evolving industry dynamics.

Research Approach

This paper adopts a qualitative approach to examine the economic dimensions of Brunei's film sector. Data was collected through semi-structured interviews with individuals who are directly involved in Brunei's film and creative industry, including local filmmakers, industry practitioners, and representatives from relevant institutions. These interviews provided insights into production practices, labour dynamics, and challenges within the sector.

To complement this, a survey was conducted to capture broader public perceptions of local film consumption and industry viability. Participants were selected using purposive sampling to ensure relevance to the research focus. Interviewees included individuals actively involved in film production, directing and related creative work, allowing for a grounded understanding of industry practices from within. The survey targeted a wider audience to explore viewing habits, perceptions of local film quality, and attitudes towards filmmaking as a profession.

Data was analysed thematically, focusing on three key dimensions derived from the study's analytical framework: production activity, labour and skill development, and market circulation. Rather than assessing the sector against conventional industry benchmarks, this approach focuses on understanding how film operates as an economic activity within the specific context of Brunei.

Film as Economic Potential, Not Just Cultural Output

COVID-19 as a Catalyst for Industry Development

Although Brunei's film sector had already begun to develop prior to 2020, the COVID-19 pandemic marked an important turning point in the development of Brunei's screen sector. While the pandemic disrupted film industries globally, the unique circumstances in Brunei created opportunities for local screen production. With strict border controls and restrictions on international travel, Brunei experienced what Fischer and Liu (2021) describe as a temporary "closed system of interaction", in which local businesses increasingly relied on domestic production companies and creative practitioners rather than overseas providers.

Fischer and Liu (2021) identify several significant changes during this period, including increased demand for locally produced screen content, greater participation by freelancers and practitioners outside the traditional screen industry, and the emergence of new production opportunities across government agencies and private businesses. Their study argues that the pandemic disrupted the existing production landscape by encouraging greater interaction between local production houses, policymakers, and businesses, thereby strengthening Brunei's domestic screen ecosystem.

Rather than creating Brunei's film industry, the pandemic accelerated developments that were already beginning to emerge. Increased production activity, expanding professional networks, and growing reliance on local creative expertise demonstrated the adaptability of Bruneian filmmakers under changing economic contributions. These developments also highlighted that the sector was capable of responding to market demand despite structural limitations.

The pandemic therefore represents an important contextual moment for understanding the subsequent development of Brunei's film sector. The expansion of institutional initiatives, entrepreneurial production companies, and training opportunities discussed in the following

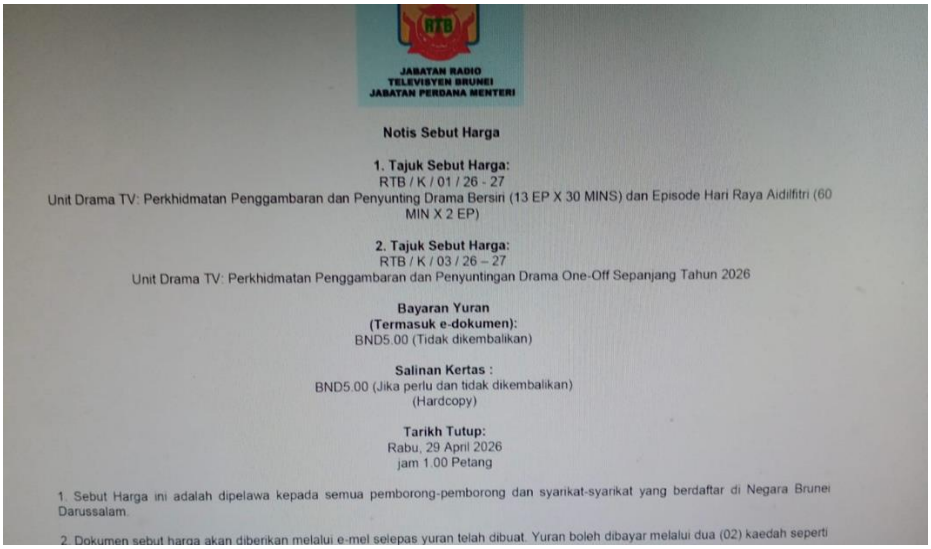
sections can be understood not as isolated developments, but as part of a broader period of accelerated industry formation that reinforced film's role within Brunei's emerging creative economy.

Production Activity

As discussed in the literature, small nation cinema should not be evaluated solely through scale or profitability, but through the presence of sustained production practices and institutional support (Hjort & Petrie, 2007; Hjort, 2010). The findings demonstrate that film production in Brunei has evolved beyond informal projects towards a more structured and increasingly recurrent form of activity.

One of the most noticeable developments is the role of institutional initiatives. Programmes led by RTB and AITI, particularly the Pitch & Produce programme, have created more structured pathways for filmmakers. The production of 49 locally commissioned titles under this initiative in collaboration with companies such as Bruhaha Comedy, Filterworks Productions, and Regal Blue Production, indicates that filmmaking in Brunei is no longer confined to isolated creative efforts but is supported by institutional frameworks.

In addition to formal programmes, there are also ongoing efforts by government institutions to support industry development through training and content opportunities. RTB, for instance, actively engages production houses by advertising opportunities for content creation, including drama productions to be featured on local platforms such as RTBGo. As shown in *Figure 1*, these calls outline specific production requirements and invite registered companies to contribute to local content development. Such efforts demonstrate a continued institutional commitment to supporting production activity and expanding opportunities within the sector.



JABATAN RADIO
TELEVISYEN BRUNEI
JABATAN PERDANA MENTERI

Notis Sebut Harga

1. Tajuk Sebut Harga:
RTB / K / 01 / 26 - 27
Unit Drama TV: Perkhidmatan Penggambaran dan Penyunting Drama Bersiri (13 EP X 30 MINS) dan Episode Hari Raya Aidilfitri (60 MIN X 2 EP)

2. Tajuk Sebut Harga:
RTB / K / 03 / 26 – 27
Unit Drama TV: Perkhidmatan Penggambaran dan Penyuntingan Drama One-Off Sepanjang Tahun 2026

Bayaran Yuran
(Termasuk e-dokumen):
BND5.00 (Tidak dikembalikan)

Salinan Kertas :
BND5.00 (Jika perlu dan tidak dikembalikan)
(Hardcopy)

Tarikh Tutup:
Rabu, 29 April 2026
jam 1.00 Petang

1. Sebut Harga ini adalah dipelawa kepada semua pemborong-pemborong dan syarikat-syarikat yang berdaftar di Negara Brunei Darussalam.

2. Dokumen sebut harga akan diberikan melalui e-mel selepas yuran telah dibuat. Yuran boleh dibayar melalui dua (02) kaedah seperti

Figure 1. RTB Call for Production Services.

At the same time, production activity is increasingly driven by filmmaker-led enterprises. Companies such as New Wave Films, Filterworks Productions, and Marhain Entertainment reflect a shift towards more entrepreneurial production models, where practitioners operate as both creative workers and business actors. This aligns with what is often seen in smaller nation cinema trends where production is sustained through networks of independent companies rather than large studios.

Educational institutions further reinforce this development. The introduction of film-related courses at Universiti Brunei Darussalam, such as *AX-4301 Short Film Making*, Diploma in Digital Arts & Media at Politeknik Brunei alongside programmes at International Graduate Studies College (IGS College) and earlier initiatives such as local film school, Mahakarya Institute of the Arts Asia, reflects the gradual formalisation of training pathways. Platforms such as the PRISM UBD Film Festival *(Fig. 2)* also provide students with exposure to practical production experience and collaborative work environments, supporting the development of skills necessary for industry participation. As highlighted by Liu and Fischer (2023), such higher education film festivals function as "industry nodes" that facilitate connections between students, practitioners, and media institutions, while also creating opportunities for networking, skill development, and potential employment pathways. In contexts where formal industry structures remain limited, these initiatives play an important role in bridging education and professional practice. Although these developments are still developing, they represent important foundations for a future professional pipeline, highlighting that production activity in Brunei is both creative and incremental.



Figure 2. PRISM UBD Short Film Festival.

In parallel, there has been a growing effort among local filmmakers to release their work through formal exhibition channels. Practitioners such as Adam Groves with his film *PARA.DOC (Fig. 3)* alongside Dr. Rui Lopes and Syafi Halim's award-winning documentary film *Wujud (Fig. 4)*, represent a growing cohort seeking to position Bruneian films within cinema circuits, often supported by venues such as One Cineplex. This reflects an increasing intention to move beyond informal or online-only distribution towards a more structured mode of exhibition.



Figure 3. 'PARA.DOC' (2025), a film by Adam Groves.

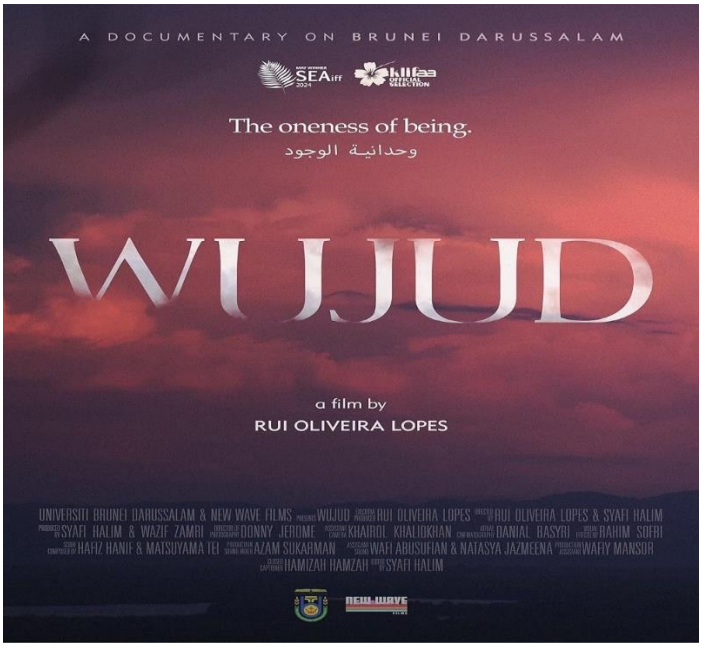


Figure 4. New Wave Films 'Wujud' (2025) by Dr. Rui Lopes and Syafi Halim.

Despite these developments, production activity remains structurally fragmented. Interview data highlights the absence of a centralised coordinating body, with support dispersed across multiple institutions rather than guided by a dedicated entity such as a national film commission. In countries such as South Korea, film commissions operate across different regions, including the Jeju Film Commission and Busan Film Commission. These regional bodies play a key role in supporting local productions, facilitating funding and logistics, and attracting both domestic and international projects.

In contrast, Brunei's current production ecosystem remains fragmented, with support diffused across multiple agencies and lacking a unified industrial strategy. According to Syafi Halim, co-founder of New Wave Films (from a personal interview, 22 January 2026), the absence of a dedicated film commission and coordinated institutional support continues to limit the sector's ability to develop into a more stable and sustainable industry.

Labour & Skill Development

One of the most significant findings of this study is that the film sector in Brunei contributes meaningfully to human capital development, a key economic function highlighted in creative economy research (Howkins, 2001; Pratt, 2004). Film projects generate a range of employment

opportunities across roles such as producing, directing, editing, cinematography, sound design, and production management. Although many of these roles are project-based or freelance, they nonetheless contribute to cumulative skill development and experiential learning, laying the foundation for a diversified creative workforce.

Interviewees consistently emphasised the importance of skill development in shaping industry capacity. Abdul Zainidi, a Bruneian director of *the Vanishing Children series (Fig. 5)* and *Teluki (2013)*, highlighted the need for more structured training opportunities, including access to international workshops and overseas programmes (from a personal interview, 18 January 2026). This reflects broader challenges commonly observed in small markets, where access to global knowledge networks is often limited by financial and institutional constraints (Hjort & Petrie, 2007).

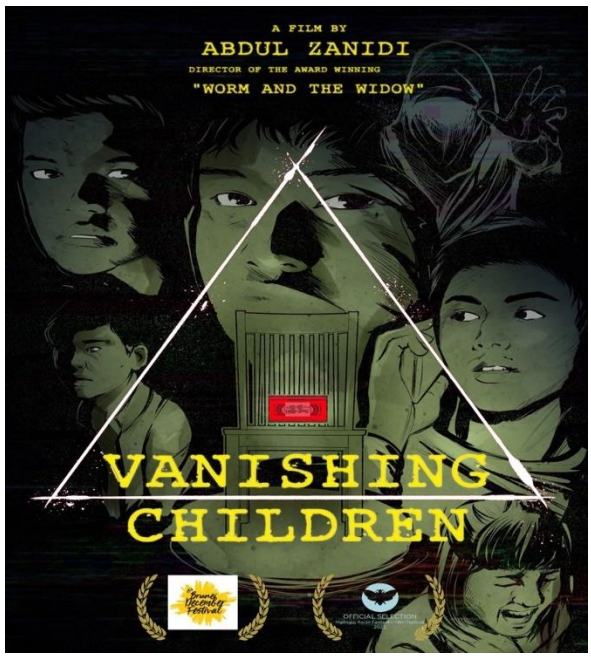


Figure 5. Vanishing Children series by filmmaker Abdul Zainidi.

At the same time, there is evidence of increasing international exposure among local practitioners. Several Bruneian filmmakers, including Nurain Abdullah, Imelda Groves and Abdul Zainidi, have been awarded government-supported opportunities to attend the Busan Asian Film School. Such initiatives provide access to global industry practices, networks, and standards that are not readily available within the local context.

Abdul Zainidi's experience further illustrates this development. During his time at the Busan Asian Film School, he shared that he won a film pitching competition against

international participants, adapting his presentation by incorporating sign language to communicate his concept for his award-winning film *Teluki*, recognising that his audience may not be familiar with Brunei's cultural context. This demonstrates not only technical and creative skill, but also the ability to translate local narratives into forms that are accessible to global audiences.

These examples suggest that while local industry structures may be limited, individual practitioners are actively developing competencies that align with international standards. However, while skill development is clearly taking place, it is not yet supported by a cohesive system that can systematically transition individuals into professional roles. As a result, the labour system within the film industry is characterised by a high degree of informality and precarity. Employment remains largely freelance and project-based, requiring individuals to actively construct their own career pathways. Respondents frequently noted that entry into the industry depends heavily on personal initiative, networks, and the ability to seek out opportunities independently. This reinforces the perception of filmmaking as a passion-driven activity or an "expensive hobby," reflecting both financial uncertainty and the absence of stable income streams.

At the same time, the findings reveal an emerging pattern of entrepreneurial transition, where individuals move from conventional employment into creative practice, often establishing their own production platforms due to limited opportunities within existing structures. This is exemplified by a Bruneian filmmaker, Moza, who transitioned from a corporate career into full-time filmmaking and founded Cinekota. His experience reflects how individuals respond to structural limitations by creating alternative pathways, while also engaging with broader digital markers such as content production for branding and marketing.

Nevertheless, these transitions remain uneven and are often dependent on individual resilience rather than systemic support. The outward mobility of practitioners further highlights these limitations. For instance, Liyana Mansor, a Bruneian film editor, relocated to the United Kingdom to pursue film editing professionally and has since worked on internationally recognised productions, including the Emmy-nominated series *Star Wars: Andor* (2022). Her trajectory reflects both the high level of talent emerging from Brunei and the limitations of the local industry in providing comparable opportunities.

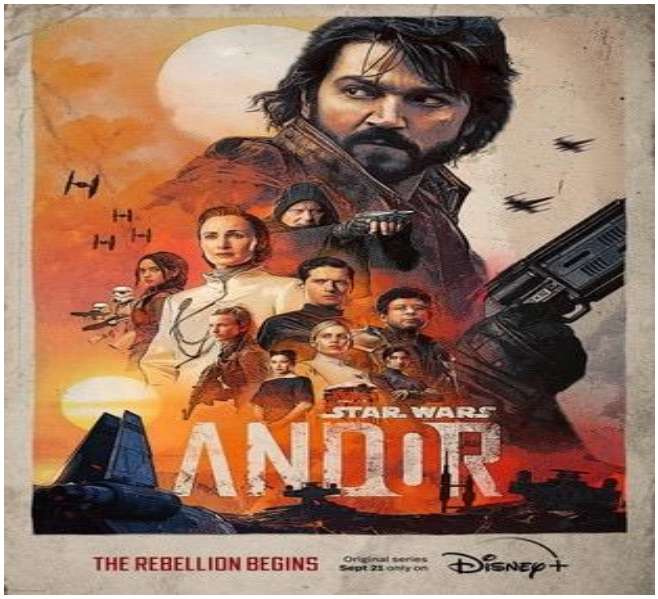


Figure 6. Star Wars: Andor (2022).

These dynamics must also be understood within the broader context of Brunei's labour market. As noted by Awang Haji Noor Jusmin bin Haji Abdul Samad, previously the Deputy Permanent Secretary of Ministry of Culture, Youth and Sports, more than 5,000 graduates enter the workforce annually, many of whom continue to face limited employment opportunities. While there are increasing calls to explore alternative career pathways, a strong preference for government and corporate employment remains, reflecting perceptions of stability and security. Such preferences are not solely individual choices but are shaped by institutional conditions in which structured career pathways are more clearly defined outside the creative sector.

Taken together, these findings suggest that while the film sector contributes to skill development and creative participation, it remains constrained in its ability to retain talent and support long-term professionalisation without stronger institutional and structural support.

Market Circulation & Public Perception

In addition to production activity and labour dynamics, the circulation of film content plays a crucial role in determining whether the sector can function as an economic activity. As highlighted in small nation cinema literature, limited domestic markets often require alternative forms of distribution and value creation beyond traditional box office models (Elsaesser, 2005).

In the context of Brunei, film circulation is supported by a combination of digital platforms and limited theatrical exhibition. Platforms such as RTBGo, OOPS TV, previously Progresif Media, YouTube, and social media have enabled filmmakers to reach wider audiences, despite the constraints of a small domestic market. At the same time, cinemas such as One Cineplex provide opportunities for local films to be screened publicly, contributing to their visibility and legitimacy. While these channels expand exposure, they do not necessarily translate into consistent revenue or long-term sustainability.

A recurring issue raised by interviewees is the lack of experience in film marketing and distribution. Many filmmakers expressed uncertainty in promoting their work, identifying target audiences, and navigating pathways such as film festivals or international circulation. As a result, even well-produced films may struggle to move beyond limited or informal networks. In contrast, filmmakers such as Abdul Zainidi demonstrate that wider circulation is possible, particularly through engagement with international platforms such as film festivals. His experience highlights how global exposure can enhance visibility and recognition for Bruneian filmmakers. However, access to such opportunities is often dependent on institutional connections and support, rather than being widely accessible. This creates an uneven landscape, where some filmmakers are able to extend their reach internationally while others remain confined to local circulation.

These challenges are further compounded by the absence of a centralised institutional framework. While organisations such as RTB and AITI provide support, their roles are not exclusively focused on film. As a result, filmmakers often lack clear guidance on distribution strategies, funding pathways, and market positioning. This reinforces calls from industry practitioners, including Syafi Halim and Nurain Abdullah, for a dedicated film commission that can provide structured support and direction.

Notably, these concerns are not new. In 2018, over 40 Bruneian filmmakers gathered to collectively discuss and develop a proposal for a Brunei Film Commission titled *Cadangan Suruhanjaya Filem Brunei.* The 2018 proposal for a Brunei Film Commission as shown in Figure 7 had already outlined a range of structural challenges affecting the industry. These included limitations in distribution pathways, lack of coordinated marketing strategies, restricted access to international platforms, and the absence of clear guidelines for production and circulation. The proposal also put forward recommendations to address these gaps, including the establishment of a centralised body to coordinate funding, facilitate international

partnerships, support promotion and distribution, and provide clearer direction for industry development. In doing so, it recognised that market circulation is not only dependent on production output, but also on institutional structures that enable films to reach wider audiences.



CADANGAN SURUHANJAYA FILEM BRUNEI

1. **MUKADIMAH**
   - 1.1. Merujuk perjumpaan Pemangku Pengarah Kebudayaan dan Kesenian, Awang Haji Mohamad Abdoh bin Haji Awang Damit bersama penggiat-penggiat filem dari Persatuan Filem dan Teater Evolusi (FITREE), Regalblue Production, Origin Films, PESTAB Entertainment, Bego Hazirul Studio Production dan Universiti Brunei Darussalam pada hari Sabtu 31 Mac 2018, Persatuan FITREE telah dilantik sebagai penyelaras sementara untuk mengumpulkan maklumat dan cadangan dari penggiat-penggiat filem tempatan tentang situasi sekarang dan permasalahan yang dihadapi dalam penerbitan filem di Negara Brunei Darussalam.
   - 1.2. Maklumat dan cadangan tersebut akan dihadapkan kepada Kementerian Kebudayaan, Belia dan Sukan (KKBS) bagi penubuhan sebuah jawatankuasa khas yang menangani hal ehwal perfileman di Negara Brunei Darussalam.
   - 1.3. Sehubungan dengan itu beberapa siri perjumpaan antara penggiat-penggiat filem tempatan telah dilakukan bagi membincangkan hal berkenaan dengan mengambil skop sejarah perfileman di Negara Brunei Darussalam, kes studi dari beberapa perbadanan kemajuan filem di luar negara (Cambodia Film Commission, Film Development Council of the Philippines, Perbadanan Kemajuan Filem Nasional Malaysia – FINAS, New Zealand Film Commission dan Korean Film Council) dan cadangan hala tuju bagi entiti organisasi penyelarasan filem Brunei yang akan ditubuhkan nanti.

2. **RASIONAL**
   - 2.1. Susulan daripada Forum Industri Kreatif Brunei pada tahun 2011 dan 2012 yang diungkayahkan oleh KKBS, penerbitan filem Brunei mula bergerak semula.
   - 2.2. Selepas filem cereka pertama Brunei, *Gema Dari Menara*, yang dikeluarkan pada tahun 1968, pada tahun 2013 iaitu setelah 45 tahun kemudian baharu terbit filem cereka kedua Brunei iaitu *Ada Apa Dengan Rina?* Sehingga 2018 sebanyak 11 filem cereka telah ditayangkan di pawagam komersil Brunei.
   - 2.3. Di peringkat antarabangsa, filem Brunei telah diundang dan ditayangkan dalam beberapa Festival Filem sama ada melalui penyeliaan KKBS mahupun rangkaian hubungan peribadi antara penggiat filem di luar negara dengan penggiat filem tempatan.
   - 2.4. Dalam situasi terkini, beberapa institusi pengajian tinggi telah mengadakan kursus yang berkenaan dengan filem. Jumlah penuntut yang memohon untuk mengikuti kursus Audio Visual Technology di IBTE juga semakin meningkat saban tahun. Sementara iklim pembelajaran yang menggunakan medium filem juga semakin berkembang dan diminati.
   - 2.5. Jangkaan dan harapan terhadap filem Brunei daripada komuniti filem antarabangsa juga semakin meningkat.

3. **OBJEKTIF**
   - 3.1. Menjaga kemasylahatan, kebajikan dan kepentingan penggiat filem tempatan;
   - 3.2. Menjaga kualiti filem dari segi konten dan fizikal supaya tetap mengikuti piawaian pembuatan filem serta tidak bertentangan dengan dasar dan aspirasi kerajaan; dan

1

Figure 7. The 2018 Brunei Film Commission proposal.

The continued relevance of these issues suggests that many of the structural limitations identified by industry practitioners remain largely unresolved. Despite ongoing institutional efforts, the absence of a dedicated coordinating framework continues to constrain the sector's ability to develop more effective and sustainable market pathways.

Beyond structural constraints, public perception plays a critical role in shaping market dynamics. Survey findings indicate that while some respondents recognise the potential of film to contribute to the economy, a significant proportion still perceive filmmaking as a hobby rather than a viable profession. This perception is closely linked to concerns about financial stability, career sustainability, and limited visibility of the sector. Such perceptions have direct implications for market development, influencing not only audience engagement, but also investment interest and broader societal support. In this sense, the development of a film market

is not only dependent on infrastructure and distribution channels, but also on cultural recognition and public legitimacy.

Earlier local productions such as *Ada Apa Dengan Rina (2013)* and *Yasmine (2014)* demonstrate that strong audience engagement is possible. As noted by Nurain Abdullah, co-founder of Regal Blue Production (from a personal interview, 16 February 2026), these films achieved full-house screenings, driven largely by the novelty of seeing stories grounded in Bruneian language, culture, and identity. However, this level of engagement has not been consistently sustained in more recent productions.



Figure 8. Regal Blue Production 'Ada Apa Dengan Rina' (2013).



Figure 9. Local Bruneian film, 'Yasmine' (2014).

Interview and survey findings suggest that this shift reflects a combination of structural, industrial, and audience-related factors. From an industry perspective, respondents highlighted concerns about content quality, particularly in storytelling, scriptwriting, and originality. From an audience perspective, changing consumption habits including increased reliance on global streaming platforms and short-form digital content have reshaped viewing preferences.

At the same time, audience feedback also highlights clear strengths within the local industry. Respondents pointed to the ability of Bruneian filmmakers to produce culturally authentic and thought-provoking content, particularly in addressing socially sensitive or "taboo" topics. This is reflected in productions such as *Demi Gadis* by New Wave Films *(Fig. 10)*, which explores difficult themes surrounding youth, family dynamics, and social vulnerability. As discussed by the filmmaker Natasya Jazmeena, the film was intentionally developed to address issues that are not openly discussed within Bruneian society, positioning it as a form of socially conscious storytelling rather than conventional entertainment.



Figure 10. New Wave Films 'Demi Gadis' (2024), a film by Natasya Jazmeena.

Such examples demonstrate that local filmmakers are not only engaging with culturally relevant narratives, but are also pushing creative boundaries in ways that challenge audience expectations. The use of authentically Bruneian perspectives, combined with the willingness to address sensitive issues, highlights a distinctive strength within the sector. This suggests that cultural relevance and social engagement remain important assets for local filmmaking, even as the industry continues to navigate structural and market-related challenges.

Taken together, these findings highlight a broader mismatch between production and audience engagement within the sector. While there is clear creative potential, sustaining audience interest requires improvements in quality, training, and market positioning. At the same time, financial sustainability remains a persistent challenge, with most filmmakers relying on government funding and limited private investment. This reflects a broader pattern in small media markets, where public funding supports production but does not necessarily translate into long-term commercial viability (Hjort & Petrie, 2007).

Nevertheless, indirect economic value continues to emerge. Film production generates activity across related sectors, including editing services, technical support, event production, and digital marketing. These spillover effects contribute to a wider micro-creative economy, supporting the argument that economic value in creative industries often extends beyond direct financial returns (Pratt, 2004).

Overall, while visibility and exposure have improved, the transition towards a fully functioning market remains incomplete. Limitations in distribution knowledge, institutional coordination, financial sustainability, and public perception continue to constrain the sector's broader economic potential.

Reframing Film in Brunei: An Emerging but Misaligned Industry

When considered together, the findings across production activity, labour and skill development, and market circulation suggests that Brunei's film sector cannot be understood through a single dimension. Rather, it reflects an emerging but uneven ecosystem, where key components of an industry are present, yet not fully aligned.

From an institutional perspective, there is clear evidence of support. Government agencies such as RTB and AITI have introduced funding schemes, workshops, and content platforms, alongside opportunities for international exposure. These initiatives demonstrate that film is recognised, to some extent, within broader creative economy strategies. However, this support remains fragmented, with responsibilities distributed across multiple institutions rather than coordinated through a dedicated framework. As a result, while opportunities exist, they are not always systemically structured or easily accessible to all practitioners.

From an industry perspective, filmmakers themselves play a central role in sustaining the sector. The findings show a growing number of practitioners actively producing content, establishing production companies, and seeking alternative pathways such as entrepreneurship. At the same time, many face challenges related to financial instability, lack of guidance, and limited access to structured career pathways. As highlighted by Nurain, filmmaking requires not only passion but also professional training and standards, suggesting that increasing output alone is insufficient without corresponding improvements in quality and skill development.

From the audience perspective, engagement with local films remains inconsistent. While earlier productions such as *Ada Apa Dengan Rina (2013)* and *Yasmine (2014)* demonstrated strong audience interest, this level of engagement has not been consistently sustained. Survey findings indicate that public perception continues to shape market outcomes, with many viewing filmmaking as a hobby rather than a viable profession. At the same time, changing consumption habits, particularly the rise of global streaming platforms and short-form content, have influenced viewing preferences and reduced reliance on local cinema.

Taken together, these findings suggest that the challenges facing Brunei's film sector are not due to a lack of effort from any single group. Instead, they reflect a broader misalignment between institutional support, industry development, and audience expectations. Government initiatives exist but lack coordination, filmmakers are active but operate within uncertain structures, and audiences are present but not consistently engaged.

Collectively, these findings also invite a reconsideration of earlier perspectives on Brunei's screen sector. Lopes and Aliudin (2019) previously described screen production in Brunei as largely "non-existent", while recognising the economic contribution of broadcasting sectors such as radio and television. While this assessment reflected the state of the industry at the time, the findings of the paper indicate that Brunei's film sector has since evolved. Rather than indicating an absence of activity, Brunei's film sector now demonstrates identifiable forms of production, labour and skill development, and market circulation that collectively perform important economic functions, albeit within an emerging and still fragmented industry.

This misalignment is further reinforced by the gap between industry initiative and institutional response. The 2018 proposal for a Brunei Film Commission demonstrated that filmmakers have already identified key challenges and proposed solutions, particularly in relation to coordination, distribution, and market development. The continued relevance of these issues suggests that progress has been limited, highlighting the need for more cohesive and targeted intervention.

In this sense, the question is not whether Brunei has a film industry, but rather how that industry should be understood. Rather than viewing it as either absent or fully developed, the findings suggest that Brunei's film sector exists within an early stage of industrial formation, where cultural production and economic activity are already interconnected, but not yet stabilised.

Conclusion

Brunei's film sector, while small, demonstrates a level of activity that extends beyond its common perception as purely cultural or informal. This paper has shown that the sector already performs key functions associated with an industry, including production activity, skill development, and contributions to a growing creative economy. Rather than an absence of activity, the findings indicate that the sector should be understood as an emerging industry that is still undergoing consolidation

At the same time, the analysis highlights that these emerging functions are not yet supported by a cohesive system capable of sustaining long-term growth. The development of the sector is constrained not by a lack of participation or initiative, but by a broader misalignment between institutional support, industry practices, and audience engagement. Government initiatives, including funding schemes, training programmes, and content platforms, demonstrate increasing recognition of the sector within the creative economy. However, these efforts remain fragmented and dispersed across multiple institutions, limiting their overall effectiveness. Without a centralised framework to coordinate these efforts, filmmakers are often required to navigate complex and unclear pathways in order to access opportunities.

From an industry perspective, filmmakers continue to sustain the sector through independent and entrepreneurial practices, despite facing ongoing challenges related to financial instability, limited career pathways, and access to professional training. At the same time, audience engagement remains uneven, shaped by perceptions of filmmaking as a hobby rather than a viable profession, as well as shifting consumption patterns influenced by global streaming platforms. These dynamics reinforce the structural disconnect between production, labour, and market elements, preventing the sector from functioning as a fully integrated system.

The persistence of these challenges is further reflected in earlier industry-led initiatives, such as the *Cadangan Suruhanjaya Filem Brunei* proposed in 2018. The proposal identified key structural gaps, including the need for coordinated institutional support, improved distribution mechanisms, and clearer industry frameworks. The continued relevance of these issues suggests that, while awareness of the sector's challenges exists, progress in addressing them has been uneven. This highlights the importance of moving beyond recognition towards more cohesive and sustained forms of development.

Recognising the film sector in this way is particularly important within the context of Brunei's broader economic diversification goals under *Wawasan Brunei 2035*. Rather than viewing film solely as cultural output, it should be understood as part of the creative economy, where its value extends beyond direct financial returns to include employment generation, skill development, and creative entrepreneurship. In this sense, the sector should not be viewed as absent, but as an emerging system that requires alignment in order to realise its full potential.

At the same time, realising this potential requires more than increasing production output. Strengthening coordination across institutions, improving access to structured training and professional pathways, and enhancing market development and distribution capabilities remain central to the sector's long-term sustainability. The continued relevance of earlier policy discussions, including the need for structured oversight and industry mapping, suggests that progress remains uneven and that further strategic alignment is required.

Ultimately, the significance of Brunei's film sector lies not only in its current scale, but its potential to contribute to the country's evolving economic landscape. Understanding and supporting this transition is therefore essential in positioning film as a meaningful component of Brunei's broader strategy for economic diversification and creative economy development.

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