

摘要

3D 電腦動畫電影產業在過去十年間的蓬勃發展有目共睹。在台灣，政府所提出的「兩兆雙星」產業政策中，也以「數位內容」產業為「雙星」計畫之一，而「電腦動畫」則列為優先發展的重點項目之一。

本論文以作者多年的國際媒體產業經驗與觀察為主軸，輔以豐富的產業研究資料及分析，探討台灣在發展 3D 電腦動畫電影產業時的各項競爭條件。論文架構採用學者波特在國家競爭優勢中所提出的價值鏈及鑽石模型理論，逐一分析台灣在面臨國際競爭時，各項條件的優勢與不足。

要了解好萊塢如何成功地揉合「創意」與「科技」，不斷創造出一部部席捲全球的 3D 電腦動畫電影，必須先認識好萊塢電影產業的運作基礎。好萊塢有著相當複雜的產業發展背景，時至今日，這些時空背景仍深深地影響著產業的各個層面。本論文先深入剖析好萊塢電影產業的各項價值活動、產業及人力結構、以及電影投資、融資與風險控管等機制。其後，則進一步分析 3D 電腦動畫產業的版圖現況及發展趨勢，並以三家領導廠商 Pixar、DreamWorks Animation、Blue Sky 進行個案分析，透過對這三家廠商發展歷程與運作模式的檢視，台灣可以從中學習成功的經驗，並避免重蹈覆轍。

論文最後，則基於以上之論述，提出兩項論點，說明此刻是台灣以 3D 電腦動畫電影切入國際數位內容產業的良機。第一項論點是現階段仍屬全球 3D 電腦動畫產業發展初期，新進入者較易跨入此一新興市場；第二項論點則是台灣世界級的資訊產業提供了優勢的競爭基礎，使台灣具有更高的策略位置。因此，台灣可以高科技產業帶動數位內容產業的發展，延續「科技矽島」的成功經驗，再創「Silicon Hollywood：矽谷+好萊塢」的國家新競爭優勢。

ABSTRACT

The 3D feature computer animation industry has grown tremendously in the past 10 years. In Taiwan, the government has identified the “digital content” industry as one of the two rising stars in the “Two Trillions, Twin Stars” national industry development plan, with “computer animation” as its top development priority.

Based on the author’s years of observation and experience in international media and business, with abundant industrial research and statistical data, this thesis discusses Taiwan’s competitive advantages in the development of a globally competitive 3D feature computer animation industry. This thesis also refers to Michael Porter’s “Competitive Advantages of Nations”, which uses the Diamond Model to identify a nation’s weaknesses and strengths in the global economy.

To realize how Hollywood can successfully combine creativity and technology to create box-office 3D computer animated movies, it is wise to consider how Hollywood fundamentally works. Hollywood is a complicated machine fed by its rich background and history that currently affects every facet of its behavior. This thesis breaks down that behavior into sections that detail topics such as value chain activities, modern industrial and labor structure setup, film financing and risk management. Three leading computer animation studios are Pixar, DreamWorks Animation, and Blue Sky. After understanding how the Hollywood film industry works, the next logical topic to examine is how these studios relate globally with the international 3D feature animation industry’s landscape and development trend. Using these studios as case studies, examining their timeline of development and work methodologies, important lessons can be learned and previous pitfalls avoided as Taiwan takes its first steps towards establishing its own successful 3D computer animation industry.

Upon its analysis, this thesis identifies two strong reasons that justify why *now* is the time for Taiwan to establish its 3D computer animation industry as a means to compete in the global digital content market. The first reason is because the current global landscape of the 3D feature animation industry is just past its infancy and in an early stage of development, making it easier for new entries into the market. The second reason is because Taiwan has the advantage of having a strong resource in its world-leading IT industry that provides strong leverage above the competition. Taiwan is already world famous for being a technologically strong “Silicon Island”. By creating a bridge between technology and creativity, Taiwan can emulate its previous success model and thus create a new international identity as the “Silicon Hollywood”.

