The Internationalization Strategy of the Chinese Animation Industry

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ABSTRACT

This study explores the internationalization strategy of Chinese animation companies. It provides in-depth case studies of two Chinese firms, each internationalizing through collaboration, albeit following different paths. One company began with technology competence, going to foreign countries by joining computer-generated production, and then expanding its business along the value chain. The other company first established comprehensive design, production, and distribution capabilities, and then considered international collaboration. The study also illustrates potential internationalization strategies for late comer animation companies. Based on the two cases, this study finds that both companies tend to adopt gradual internationalization strategies, building up competence through learning and collaboration. Trust, collective learning, and competence upgrading are found to be key success factors for international management. Other issues are addressed to compare the different reasons and paths of internationalization between leading western and Chinese firms.

Keywords: International strategy, Animation industry, Cross-cultural management, Emerging market

1 The Walt Disney Company (c. 1923) is a world leading entertainment and media enterprise focusing on media networks, parks and resorts, studio entertainment, consumer products and interactive media.
2 Pixar Animation Studios is a computer animation studio based in California, well-known for its technology innovation as seen in their movies such as Finding Nemo and Toy Story. It was acquired by Disney in 2006.
3 DreamWorks Studios is an American animation production company. It makes animated films, TV programs, music, and games. Its most successful animated movies include Shrek, Madagascar, and Kung Fu Panda.
4 Studio Ghibli is a Japanese animation film studio best known for its anime feature films. Four of its works have
1. INTRODUCTION AND INDUSTRY REVIEW

Internationalization and cross-border collaboration is a trend in the animation industry as firms grow, gain specific capabilities, and develop products aimed at different markets. Internationalization refers to activities related to cross-country trading, import/export, and collaboration. As leading animation companies, Disney, Warner Bros, and DreamWorks have long been engaged in overseas business through exports of VCDs, movies, and consumer products. International outsourcing of animation production is also observed in Disney, DreamWorks, and Studio Ghibli, as a way to reduce production costs. International joint development of animated movies is now an effective way to gain new knowledge and enter new markets. To grow their business and develop closer customer relationships, Disney and Sanrio have established overseas theme parks. This enables their cartoon characters to continuously generate profits. Table 1 is a summary of the main Foreign Direct Investment (FDI) activities of animation companies in different business sectors. Key success factors such as quality management and cross-culture issues are highlighted (Table 1).

Table 1. Internationalization practice of animation companies

<table>
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<th>Internationalization activities</th>
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<td>Production outsourcing and collaboration</td>
<td>Outsourcing production, or collaboratively producing movies internationally</td>
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Source: Author’s interpretation

China, the world’s largest emerging market, hosted a prosperous animation industry in the 1940s, when its first animated movie, Princess Iron Fan⁸, was released. The Shanghai Animation Film Studio⁹ produced many influential animation movies in the 1970s and 1980s with oriental art styles and traditional Chinese stories. However, since the open door policy began in 1980, western and Japanese animated films have entered the Chinese market with a diversity of content and lower prices. Thus, many state-owned Chinese companies faced financial problems, and became contract studios for foreign firms. The original R&D (Research and Development) capability in China was extremely limited for the following 20 years, with no competitive advantages with foreign products. Entering 2000, the Chinese government realized the importance of creative industry, and thus issued a series of policies to encourage original R&D in the animation industry. For example, during 05:00 p.m. to 09:00 p.m., the golden hours, only domestic animations are permitted on TV broadcasting. Further, companies with original R&D can enjoy tax exemption and grant support from the government. As a result, numerous animation industry clusters have emerged throughout the country. In addition, Small and Medium Enterprises (SMEs) collaborate, aiming

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⁵ Sanrio is an animation company from Japan which designs, licenses and produces cartoon products, including stationery, gifts and accessories. Its best-known cartoon character is Hello Kitty, a little cat girl.
⁶ DreamWorks Studios is an American animation production company. It makes animated films, TV programs, music, and games. Its most successful animated movies include Shrek, Madagascar, and Kung Fu Panda.
⁷ Warner Bros. Animation (c. 1930) is a leading animation producer which delivers animation products through multiple platforms (i.e. TV, digital, and home entertainment), including the award-winning TV series Tom and Jerry.
to grow and upgrade along the supply chain. In 2004, the total production of China’s animation was 5000 minutes. In 2011, capacity reached 270,000 minutes. While focusing on competence development, the Chinese government also encourages the internationalization of animation products. With government financial support, the total outward FDI of China’s animation products reached RMB 3.19 billion (US$0.5 billion) in 2009, and RMB 5.1 billion (US$0.8 billion) in 2010. With policy supporting outward FDI, the total export of Chinese animation products reached RMB 10.2 billion (US$1.5 billion), with an annual growth rate of 22.89%. In addition to exporting their own products, some companies collaborate with leading western firms including Disney and DreamWorks on movie production and character business development (China Animation Industry News, 2015).

Though China has witnessed rapid growth in the creative industry, problems remain. According to a recent analysis (Qi, Cao, Ji, & Sun, 2015), coordination between central and local government policies is lacking. Firms which have resources can benefit more from the policies, whereas small start-ups may have fewer opportunities to obtain financial support. There is a lack of quality control and performance evaluation. As the government plays leading role in this industry, it is hard to establish a free market-oriented atmosphere. Many domestic products are of low quality in story-telling and technology, yet are broadcast on TV due to lack of competition. The protection of domestic products has restrained foreign firms from entering China through direct export. Meanwhile, shortages of qualified human resources and primitive intellectual property protection remain as challenges in the current Chinese animation industry. The connection among financial institutions, IT companies, and service providers is limited. As latecomers, the internationalization practices of Chinese companies are poor. Most firms do not have the capability to integrate the whole value chain. Internationalization requires much money and experience, and is extremely hard for small companies. Therefore an appropriate strategy is important. Though there is increasing trend in outward FDI, according to China Animation Industry News (2015), the market share of Chinese animation products overseas is small. Most Chinese animated films are less competitive in advanced technology than US and Japanese products. Low cost, instead of quality, is their competitive advantage. There is an urgent need to conduct deep market research and improve product quality.

2. INTERNATIONALIZATION STRATEGIES

Current literature on internationalization can be reviewed from the perspectives of international strategy and cross-cultural management. Companies are suggested to conduct external environment assessment, and internal competitive analysis, before planning for international strategy (Deresky, 2014). Theories involving institutional analysis of global, regional, and country factors (Ghemawat, 2001) include Porter’s (1987) five forces industry-based model, which highlights rivalry among firms, entry barriers, power of suppliers, power of buyers, and substitutes, and the resource based view of the firm (Chen, 2003). Typical choices for entry modes of internationalization include exporting, licensing, franchising, contract manufacturing, turnkey operations, joint venture, and Wholly Foreign-Owned Enterprise. As the degree of internationalization increases from low (e.g. exporting) to high (e.g. Wholly Foreign-Owned Enterprise), the risk also increases (Deresky, 2014). Figure 1 shows a general process of internationalization that starts with licensing, then exporting via agency, exporting through own sales channel, local packaging or outsourcing, and FDI.

As internationalization involves communication and collaboration of firms from different country...
backgrounds, managing cultural differences is another important area to research and practice. There a number of theories on cultural dimensions, including the Hofstede’s (1997, 2001) five dimensions of power distance, uncertainty avoidance, masculinity, individualism, and time orientation, Trompenaars’ (1993) cultural dilemmas, and the recently conducted Global Leadership and Organizational Behavior Effectiveness (GLOBE) research project’s findings (Javidan & House, 2001). By linking these culture dimensions with business practices, researchers explore new product development, entry mode selection, control systems, and human resource management. In order to manage cross-cultural communication effectively, companies should develop cultural sensitivity, encode messages carefully, select the medium for interaction, understand and decode feedback, and conduct open conversations as follow-up actions (Deresky, 2014).

3. RESEARCH QUESTIONS AND METHODS

This paper explores the internationalization strategies of firms in the Chinese animation industry. In particular, the objectives of this study are: (1) to identify key business areas of internationalization of China’s animation companies; (2) to identify the paths of internationalization of China’s animation companies with detailed activities; and (3) to identify critical issues for internationalization in the Chinese animation industry. As the Chinese animation industry is still in its early stages, few companies have become international thus far. The relatively limited information and small sample is not sufficient for survey and theory testing. Meanwhile, as many Chinese companies are seeking ways of going international, yet unclear on potential approaches to seeking international opportunities, a deep investigation into the reasons, stages, and details of activities and procedures of internationalization would be of great value.

Considering these factors, the research adopts qualitative rather than quantitative methods. Two firms were selected as in-depth case studies through document review, observation, and face-to-face interviews. Case One is Crystal C.G., a fast-growing technology focused company initially, currently implementing an internationalization strategy as way to expand its business. Case Two, GAC, is a large company which already owns full design, production, and distribution capability. These two firms demonstrate differing approaches to internationalization. In Case One, the firm is becoming internationally known for its product quality, whereas in Case Two the firm entered the Japanese market through collaboration. These success stories may provide a reference for other companies exploring internationalization opportunities. Key issues related to internationalization are discussed based on the case studies.

4. CASE ONE: CRYSTAL C.G.

4.1 Company Background

Crystal C.G.\(^{11}\) is an animation studio established in 1995 Beijing. Through collaboration with companies from different sectors, it gained production experience and technological competence. From 2006, it produced 3D animations for Beijing Olympic. In 2008, it joined the project of a 100 se-

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\(^{11}\) This case study is based on online documents and an original interview with the art director of Crystal C.G.
rial animation TV program Fuwa Olympic Travel and further developed its animation production techniques. Meanwhile, by collaborating with foreign partners, Crystal C.G. began to establish offices abroad. In 2009, it joined the project of London Olympics, marking an important step of internationalization.

4.2 Preparing for Internationalization

Before beginning internationalization, Crystal C.G. developed its technology competence, and continuously learned animation production skills through a series of domestic collaborative projects. According to the art director during an original interview in order to be an innovative company with technology capability, a free organizational culture is critical, and staff should be encouraged to contribute ideas and knowledge. For example, a flexible work environment has allowed employees to work at home. To motivate team productivity, new employees are not allocated for specific jobs, but brought to different teams in which they can develop flexible skills and communication capability, which in turn helps them to find a suitable position later on. Based on this, cross-functional collaboration, knowledge sharing and multiple skill development became efficient, which can further strengthen Crystal C.G.’s technology capability and creativity.

The computer effects at Beijing 2008 Olympic opening ceremony was a great success for Crystal C.G. The quality and artistic design of the 240-meter media effects attracted foreign clients. From then on, Crystal C.G. began to collaborate internationally in the area of event presentation and exhibition effects, and developed core competence in 3D technology. According to CEO, “To further develop business, we should have our own styles” (Ding & Ye, 2009), meaning continuous focusing on 3D technology development with high quality. To achieve this, the company collaborates with universities in software development, launching training courses, and recruiting talent people with advanced skills.

4.3 Paths of Going International

The changing of customers’ requirement also helps Crystal C.G. to re-direct its business from time to time. According to the CEO, “Technology alone cannot lead to a successful international strategy” (Ding & Ye, 2009). Therefore it can be seen that after building up technology competence, the company should further upgrade other strategic management, including marketing, brand management, human resource management and customer relationship management, to meet international standards.

To achieve cross-culture management skills and be responsive to foreign customers, Crystal C.G. decided to join international projects. Their collaboration efforts include the application of multimedia technology and digital films to help manufacturing enterprises present products, and project companies to present properties. With the growth of projects, Crystal C.G. began to establish subsidiaries in Hong Kong, Dubai and Tokyo, which allowed it to become familiar with local requirements. As the CEO of the company says “Western clients always emphasize quality, and there is a strict review process, company audition, and specific requirements” (Fabe Sanbo, 2006). Accordingly, it learned from providing digital image services for the Shanghai expo 2010, and architectural presentation of buildings in Dubai, Qatar, and Moscow. It learned how to adjust designs to local requirements, developed project management skills and cross-culture communication skills, and improved the quality of its design. Apart from pure subcontracting work, Crystal C.G. entered a greater range of phases within the projects, including the value-added activities such as concept design. To protect its own rights and to know more about local culture, the company consulted with regulators and agencies on cross-culture communication.
and risk management. In the long run, it is hoping to move towards original design and to incorporate Chinese cultural elements.

Because of its experience in the Beijing Olympics project and good reputation through international collaboration, Crystal C.G. was chosen as a partner in the London Olympics project, a milestone event for the company. The main task for Crystal C.G. was to provide computer-generated effects for the stadiums along with digital presentations in the opening and closing ceremony. It also joined animation production for sports related short programs, one of which was a TV series in collaboration with a UK TV house. In order to prepare for this project, the company set up offices in London, and hired 50 employees from China and the UK.

According to the CEO of Crystal C.G., there is strong concern for the firm’s future internationalization process, as it wants to build up a strong brand.

4.4 Competence Development and Business Continuation

Crystal C.G. has grown rapidly from collaborations with partners from various industries. It is searching for a more suitable market, original design and brand. The company began with architectural design technology, and later moved into media. According to the CEO of Crystal C.G., the C.G. industry is quite competitive, and therefore it must produce original products. An important issue is brand development (Fabe Sanbo, 2006). Through working with large projects, Crystal C.G. has developed a good reputation for its creative design, advanced technology, and quality. Further, it has formed a school as another way of promoting the firm’s reputation. Courses include computer-generated software, design, and animation drawing, through which qualified students can work in Crystal C.G. Through training, sharing, and continuous learning, it aims to move up the value chain from technology advancement towards original design and brand recognition. The internationalization strategy of Crystal C.G. is summarized in Figure 2.

5. CASE TWO: GLORIOUS ANIMATION CO.

5.1 Company Background

Glorious Animation Co. (GAC) is a Beijing-based Chinese company, established in 1989. It is partly owned by China’s Central TV Corporation, and has extensive capabilities in design, development, production, and distribution of animation TV series. As GAC has a rich network

![Figure 2. Internationalization strategy of Crystal C.G.](source: Author’s original work)

13 This case study is based on an original interview with the president of Glorious Animation 北京輝煌動畫公司
of major media players, and complete design and production capability, it attracted the Japanese animation company Future Planet. Their jointly produced TV animation *The Three Kingdoms* in 2009 is a model of internationalization, with collaboration in the high-value added activity of conceptualization and product design, different from traditional approach of exporting and production outsourcing.

5.2 Preparation for Going International

Since 2000s, with the new Chinese government policy to protect the domestic animation industry, foreign animation products were forbidden from appearing on TV during the gold hours. This has made it difficult for foreign companies who previously exported products to China directly. One solution is to collaborate with Chinese companies. Thus, the collaboration between GAC and Future Planet provided opportunities for both parties. As the president of GAC said, “People recognize our strong distribution channel in China, and our familiarity with traditional Chinese culture”. Therefore, the two companies decided to produce the Chinese story of the *Three Kingdoms*.

5.3 Paths of Internationalization

Like many international collaborations, the process was never smooth. At the beginning of negotiations, both companies held different opinions. Future Planet was confident in its experience, and therefore wanted to control the majority of the cooperation, letting GAC only do the production. GAC was angered by this stance, feeling that its partner was arrogant. According to the president of GAC:

*The reason for the conflict was that we did not really know each other. They feared that our way of production may not fit their standard, whereas we thought they could not handle the story as well as we did. So why not give us both a chance to express our ideas?*

To solve this problem, they decided to each make a sample animation product separately, and invite external experts to evaluate the quality. “It was like a competition, but more importantly, it was a way to understand and respect each other”, according to the president of GAC. When both samples were finished, it was found that GAC had advanced drawing technology, while Future Planet showed professional skills in story-board making. The two firms found that they were surprisingly satisfied with each other, and decided to co-operate.

Based on mutual understanding, they were confident in considering common goals. During the project, Future Planet took more responsibility in story-board making. It listened to GAC’s opinions as patiently as possible. According to the contract, GAC was in charge of character design, background design, play writing, and music. However for most of the production, companies learned from each other. The relationship was described as pleasant, according to the president of GAC, “Almost directly after the sample making, we became friends. We know how excellent our partner is. We trusted each other so much that we did not have to do reviews for the daily cost.”

When production was finished, they focused on their respective markets to publish more efficiently. Future Planet was in charge of the Japanese and western (United States, UK, France, Italy, Russia) market, while GAC delivered books and DVDs to the Chinese market, broadcasting it through the Central TV house.

5.4 Competence Development and Business Continuation

GAC learned a great deal from this project, including the Japanese way of quality management, contract deepening, and developing communication skills by respecting different values. After the project, they discussed a further plan of character business development, hoping to make a long-

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14 *The Three Kingdoms 三國演義*
lasting brand together. Lacking experience, this was a weak area for GAC. Future Planet brought in another Japanese company, Tomy Toy, a character business company specializing in the design and manufacture of toys, game software and apparel. Brainstorming was jointly conducted, and a further plan was developed to classify products for specific markets. In the plan, products were classified into hard toys and soft entertainment services, targeting both adults and children. Hard toys included traditional sectors such as clothing and stationery, whereas soft products such as internet games were more technology and entertainment oriented. According to GAC, this was a great opportunity to learn character business design skills, and expand towards high-value added activities, as characters can become an influential brand. Overall, the internal strategies and key activities of GAC, starting with cross-culture collaboration, and then co-developing competences, are summarized in Figure 3.

6. DISCUSSIONS

The data The two cases show the internationalization strategy and paths of Chinese animation companies. Both companies developed high-quality design and production skills. By collaborating with different media firms, they moved into top positions in the domestic market. They both grew quickly into large companies with many departments. Their internationalization both began with joint project collaboration, because of their good production quality. Government policy was an important issue in supporting their internationalization. Cross-cultural communication, different standards of quality, design, project management, and contract development were the common challenges they faced. In addition, both are still learning how to develop character business, licensing, and brand promotion.

However, there are also several differences between the two companies. Crystal C.G. began internationalization at an early stage by providing specific technology and skills. They first went abroad, and then built up comprehensive capability along the value chain through learning and collaboration with both domestic and foreign companies. GAC, by contrast, had a longer history of making animation TV series to suit the Chinese market. It first acquired full capability from design, development, production, to distribution, and then went international in
the area of design and development. In terms of international entry mode, Crystal C.G. went more directly by establishing offices, and hiring local staff. GAC was more conservative and remained physically in China while searching for foreign partners and sales agencies. GAC has not considered establishing offices abroad, although they have already sent staff to work in Tokyo side-by-side with their partner companies.

The matrix (Figure 4) shows the paths of internationalization and moving upwards along the value chain, as a further implementation of the internationalization process in Figure 1. Normally exporting is a quick and safe way of going international, followed by licensing and outsourcing. Joint ventures and Wholly Foreign-Owned Enterprises are ways of deeper entry to a new market. However, sometimes companies select the more straightforward way of establishing offices or subsidiaries first (such as in the case of Crystal C.G.). To create more value-added capability to further existing technology stills, firms must focus on original design, character business development, and eventually service industries such as theme parks. Typical approaches for achieving capability upgrading include learning from experts, collaborating with leading companies, and Merger and Acquisition activities. Crystal C.G. internationalized first, then absorbed capabilities through domestic and international collaboration. GAC developed a range of capabilities first, followed by international collaboration, and continuous capability improvement. Thus, companies need not focus on only one direction, but internationalization and capability upgrading occur simultaneously in a continuously repeating cycle, during which companies identify problems and look for solutions.

Based on their stories, this study identified more general issues related to the internationalization of the animation industry. Several of these are discussed below.

![Figure 4. Paths of internationalization of the two cases](Source: Author’s original work)
6.1 Why do Animation Companies Want to Go International?

Companies staying at different positions along the value chain may internationalize for different purposes. For those with full design capabilities, brands, and characters which have already proved to be successful in domestic markets, the main driver is the market. Being market leaders, large western companies should continuously explore new opportunities, such as entering emerging markets by making products or movies of local stories, collaborating with different industry sectors, such as in the case of Disney (Regani & Dutta, 2003); gaining advanced technology through collaboration (the case of Crystal C.G.); rationalizing brands while managing international licensing more efficiently, such as the case of Sanrio (Roll, 2007) and accepting greater social responsibility (most large firms nowadays).

For firms which enter the market later, but have full production capability, going abroad, especially to countries where the animation industry is already mature, is a quick way to learn design, technology, marketing, and branding. However, there is an associated risk. Competing with a mature animation industry supply chain may be too costly for many latecomers. There is also the question of how much a firm can actually learn from this kind of internationalization. Once these companies have established worldwide reputation, the next stage will be expanding their market through exporting movies, licensing characters, and running theme parks in mature and emerging markets.

For latecomers with a specific advantage such as technical skills, but lacking in a range of capabilities, internationalization is primarily for learning. Learning includes foreign technology, design skills, and management approaches. They need to upgrade towards more value-added positions as soon as possible. It is not easy for these companies to go international directly. More likely they will began by joining collaborative projects, then gradually evolving towards larger projects. They also put effort into cross-culture communication and managerial skill development.

In addition to market access, brands, and learning, international outsourcing is an effective way to reduce costs. Many large companies subcontracting elements of production to China and India, retaining value added activities such as design and key technology development in-house.

6.2 What Kind of Products/Activities should Go International?

The stage of conceptualization and design can go international through co-development. This is generally because the product requires greater understanding of local culture. IP issues are important, and must be ensured by clearly defined contracts.

In production, generally the labor intensive parts such as the mid-production of 2D and 3D animation can be outsourced to countries where costs are low. Sound and special effects may also travel this route. When doing international outsourcing, quality control is essential, not only because partners may not deliver products as promised, but also because in different cultural contexts there may be misunderstandings of the product specifications and artistic requirements. Therefore frequent communication should be made before such problems occur.

The consumer product or character business is another important area of internationalization. Importing and exporting animation related products are conducted through international agencies or subsidiaries established by the company itself. It is important to understand the local market, and sell the most appropriate products. Sometimes there are products with specific orientations in a particular market. International licensing of brands or character is another prac-
tice of large companies. Once again it is crucial to choose the right partner, engaging in standardization, ensuring quality, and protecting IP at the same time.

Finally, although only a few companies go as far as the theme park business, it can be a profitable sector. When companies grow big, have a stable of characters and influential brands, and mature management skills, this can occur. There are several things to be concerned with in the internationalization of theme parks, including location selection, image promotion, entry mode election, and management local staff from different cultural backgrounds. Special attention should be paid to all the important issues of the service industry, as it enters a broader range of business including entertainment, hotel, travel, and restaurant.

6.3 What are the General Rules and Stages of Internationalization?

Normally firms begin with brand design and original movie production. The early stage of internationalization is associated with import and export of movies and consumer products through a sales agency. As characters become influential, companies then establish direct sales subsidiary. Meanwhile, international licensing and outsourcing of production become popular activities. Co-design sometimes takes place after a period of outsourcing collaboration. Only few companies are able to establish overseas theme parks. The process of internationalization can occur with the upgrading of positions in the value chain. Currently most internationalization activities are licensing and production outsourcing. Big companies retain technology and design in-house as competitive advantages. Small firms begin with international outsourcing in the hope of upgrading capabilities.

As latecomers, Chinese firms should also start by building up capability, which can be achieved through learning and collaboration. Most large Chinese animation companies were previously state-owned enterprises (e.g. GAC). They can gradually learn international standards, and cross-culture relationship management skills. As for SMEs and privately owned companies without sufficient resources (e.g. Crystal C.G.), a radical approach to collaboration and establishing foreign subsidiaries are also solutions for business expansion and resource acquiring.

7. CONCLUSION

This paper has discussed possible approaches of internationalization for the Chinese animation industry by studying the paths taken by two representative firms. As latecomers, many Chinese studios are acting as subcontractors for large firms by providing production at low cost. However without R&D and specific expertise, this is not sustainable. The success of Crystal C.G. is built on its competitive advantage in high-quality computer-generated production, whereas GAC retains its advantage in making products based on Chinese culture, which they are more familiar with than foreign partners. In this way, both are able to move towards more value added activities in the collaboration. Nevertheless, they remain at the early stage of internationalization, and thus need to continuously learn from foreign partners in design, character development, quality management, project management, and marketing.

In general, internationalization for Chinese firms requires time and capital investment. They have to make every effort to have original products and IP first, or to seek collaboration opportunities with large companies. Even for leading western firms, international management is not easy, as the animation industry is intertwined with the values and culture of a society and it is hard to set a universal standard for the success of an animated film. Therefore, to internationalize animation related products, understanding of local cultures and markets is important. Products or movies popular in one country do not necessarily
sell well in another country. Similar situations can be observed in more service oriented sectors, where even Disney failed to competently manage its theme park in Paris in the early years due to different cultures in consumer behavior (Grayson, Sheikholeslami, Amano, Flack, & Kleinclaus, 1994). Based on findings and discussion of this paper, further studies can be proposed to explore: (1) how to build technology competence during international collaboration; (2) how to develop trusting relationships during international collaboration; and (3) how to expand towards more value added sectors (such as theme parks) during the process of internationalization.

ACKNOWLEDGMENTS

I would like to express my sincere thanks to all the company managers whom I met during my fieldwork visits for this research, in particular the art director of Crystal C.G. and the president of GAC who were involved the interview.

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