

打敗日本電子大廠後之隱憂： 臺灣 FPD 產業的 戰略性耦合與技術依賴

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本研究從「戰略性耦合 (strategic coupling)」的角度試圖探討臺灣 FPD (Flat Panel Displays, 平面顯示器) 產業在這幾年無法提升附加價值的情況之下, 科技人才流失到國外, 不容易推動產業轉型的主要原因。在本研究, 筆者針對臺日廠商進行深度訪談, 從 GVC (Global Value Chain) 策略及資本主義調整模式等分析角度, 探討臺日科技產業戰略性耦合的差異。研究結果發現, 臺灣廠商透過戰略性耦合, 快速地打敗夏普等日本品牌電子大廠下游部門的競爭力。但缺乏長期性人才培訓機制以及人才流動等因素, 對於臺灣廠商內部的技術學習累積帶來負面的影響, 導致無法主導核心技術的開發, 不容易擺脫依賴於日本技術的困境。

關鍵字：技術依賴、戰略性耦合、調解模式、FPD 產業、臺日比較

Hidden Worries of Taiwanese FPD Industry after the Defeat of Sharp: Strategic Coupling and Technological Dependence

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ABSTRACT

This study attempts to analyze the main reason for failure of industrial upgrading and technological dependence on Japanese counterparts in Taiwan's FPD (Flat panel display) industry from the perspective of strategic coupling. Result of my research shows that Taiwanese FPD manufacturers, through their competitiveness in the GVC (global value chain) strategy and regulation mode of capitalism, strengthened the effect of strategic coupling: cost performance marketing strategies, cross-national social networks, high mobility of engineers, and adjusting and tuning of technologies were introduced from Japanese counterparts and defeated Japanese consumer electronics giants. However, on the other hand, Taiwanese strategic coupling also brought negative influence over the technology accumulation and innovation due to the lack of both long-term human resources development and inter-firm and cross-national talent mobility. These problems resulted in the Taiwanese firms' inability to develop core technologies, and they still depend on the key technologies of Japanese counterparts.

Key Words: technology dependence, strategic coupling, regulation mode, FPD industry, comparative study of Taiwan and Japan