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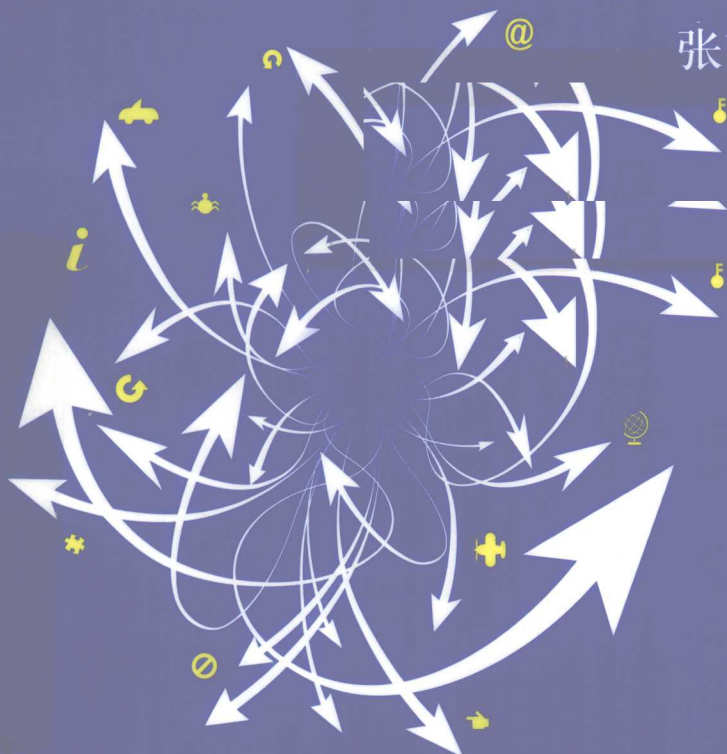
中国

创意产业

Chinese Creative Industries Report

发展报告 (2010)

张京成/主编



中国经济出版社
CHINA ECONOMIC PUBLISHING HOUSE

中国创意产业发展报告

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前言

经过编委会全体人员的紧张编撰,第五本中国创意产业蓝皮书《中国创意产业发展报告(2010)》又如期付梓了。五年来,我们如实记录中国创意产业每一年的发展轨迹,按时出版了创意产业年度发展报告。

过去的一年,党中央、国务院愈加高度关注文化创意产业的发展,力图在金融危机背景下将创意产业的振兴作为这一特殊时期转变经济增长方式的一种有效手段。2009年7月22日,国务院常务会议通过了《文化产业振兴规划》,创意产业被提升到与十大振兴产业同样的高度。《规划》从国家战略的层面提出重点推进包括文化创意、影视制作、出版发行、印刷复制、广告、演艺娱乐、文化会展、数字内容和动漫等文化产业形态,该规划的通过使得创意产业首次进入到了国家宏观视野,同时标志着创意产业作为产业形态已经上升到国家战略高度。

中共中央总书记胡锦涛2010年初在上海考察时指出:创意产业蕴藏着巨大发展潜力。要进一步做好园区规划,不断完善服务体系,努力营造创新氛围,真正把创意产业培育成经济发展的新亮点。

《中国创意产业发展报告(2010)》延续了前两年的内容框架:通过若干城市创意产业的发展反映全国的情况,2010报告还特别关注了一些二线城市创意产业后来居上的发展态势。全书从逻辑上可分为3个部分,共计18章。第一部分是第1章——总报告,该部分旨在使读者对我国创意产业的发展整体情况有一个全面的认识。第二部分是第2章至第17章,其中第2章至第16章较为系统地梳理了我国创意产业发展比较有特色的一些城市的产业最新进展。北京是全国的文化中心,上海是全国的经济中心,发展创意产业具有其他城市不可比拟的优势,一些中小城市凭着准确的定位也探索出了一条发展创意产业的路子,因此在2010年的发展报告中一些中小城市进入了我们的视野。第17章是对上述城市创意产业发展进展的分析和总结。第三部分是第18章——新视点,对创意产业发展的新观点、新理论给以发布。

在第一部分总报告中,读者可以全面了解2009年我国创意产业发展整体

概况,我们客观描述了我国创意产业的基本判断和定位,深入分析了我国创意产业发展存在的主要问题,并对2010年我国创意产业的发展趋势进行了科学展望。

第二部分是全书的重点,我们关注的主题是创意产业的投融资实践,因此大多城市都花了一定篇幅来分析该城市投融资现状与问题,通过该部分,读者可以了解我国这些典型城市发展创意产业的主要做法,尤其是这些城市在创意产业投融资方面的具体实践,同时希望一些经验的总结可以为其他城市提供一定的借鉴。这里要说明的是,所选城市的顺序是按照中华人民共和国行政区划代码标准排列的,不考虑城市 and 规模大小。这些城市主要包括“激发文化创新活力,促进经济持续增长”的北京、“凤凰涅槃的生态创意之城”的唐山、“新型工业基地转型特色文化名城”的太原、“打造现代滨海蓝色文化新城市”的青岛、“把创意产业作为国际性展台”的丽江以及“挖掘老工业基地潜力,推进创意产业发展”的重庆等。

第三部分即第18章是创意产业研究的一些新视点。特别是厉无畏先生分析了“2010年世博会促进上海创意产业发展的路径”,说明科技、文化和人才是创意产业发展的三大基石;金元浦教授引入“数字港、物联网、云计算”的概念,论述了文化创意产业集聚区与国际贸易的高端融合。希望一家之言能够达到“一石千浪”的效果。

同样,为了增强报告的实用性,我们在附录中收录了部分城市政府设立的文化创意产业扶持基金、领导机构、成立的行业协会一览表以及反映创意产业发展规模的数据表,供广大读者参考指正。

最后,希望这本《中国创意产业发展报告(2010)》能给读者以中国创意产业发展的新启示。同时,我们相信,展望2010年,中国创意产业将是面临更多机遇、发展态势更好的一年,让我们共同期待。

Foreword

After hard work of all members of the editorial committee, the 5th blue book for Chinese creative industries: *Chinese Creative Industries Report (2010)* is finally published. To us, it has been a duty to accurately record the development of Chinese creative industries annually and publish the report timely.

In the last year, CPC central committee and the State Council of China paid much more attention to the development of creative industries and tried to turn the revitalization of creative industries into an effective approach of transforming the way of economic development. On July 22, 2009, the State Council executive meeting released the *Revitalization Plan of Cultural Industry (Plan)* and creative industries were taken as important as the other Ten Industries Plans. On the national strategic level, the Plan was focused on promoting development of cultural creativity, film & TV programs production, publication and distribution, print and copy, advertisement, performance and entertainment, cultural exhibition, digital content and animation, and so on. The issue of the Plan raises the creative industries onto the national strategic level for the first time in China.

When he was investigating in Shanghai early in 2010, CPC Central Committee General Secretary Hu Jintao said, the creative industries are hidden with great potential. We should make better plans for creative parks, improve the service system, make efforts to create innovative environment and then foster creative industries into new highlights of the economy.

Chinese Creative Industries Report (2010) continued with the framework of the previous two years: the overall status of creative industries in China is reflected by many cities development, especially some medium cities for this year. The whole

book includes 3 parts logically and 18 chapters all together. The 1st part is the General Report, aiming at an overview to the development of Chinese creative industries. The 2nd part is from Chapter II- Chapter XVII, of which the Chapter II- Chapter XVI systematically introduced the latest development of creative industries in some distinctive cities, such as, Beijing is the cultural center of the whole country; Shanghai is the economic center of China and has incomparable advantages for developing creative industries. Some small or medium cities have also developed new ways for creative industries by accurate positioning and been listed into this Report this year. Chapter XVII analyzed and summarized the development of creative industries in above cities. The 3rd part introduced some new ideas and theories in creative industries.

In the 1st part General Report, readers can make an overall understanding to the development of Chinese creative industries in 2009. In this part, the Report described the basic position and judgment of Chinese creative industries and deeply analyzed some major existing problems in this field; also it made a scientific analysis for the developing prospect for Chinese creative industries.

The 2nd part is the main body of the Report. In this year, we focused on investment and financing practices in creative industries as many cities described their investment and financing status and problems. Thus readers can learn about typical investment and financing practices in those cities, and we hope those experiences be reference for other cities. The sorting order of chosen cities is sorted according to administrative division code of National Bureau of Statistics (national standard). Cities mainly included: Beijing as “to keep economy sustainable growth by stimulating cultural innovation”, Tangshan as “an ecologically creative Phoenix city”, Taiyuan as “a new cultural city transformed from an industrial base”, Qingdao as “to forge a modern blue coastal cultural city”, Lijiang as “an international showcase of creative industries” and Chongqing “to promote creative industries by exploring potentials of old industrial bases”, etc. .

The 3rd part, the Chapter XVIII collected some new ideas of creative industries research, especially Mr. Li Wuwei analyzed “approaches of Expo 2010 promoting

creative industries of Shanghai”, which explained that science & technology, culture and talents were three bases of developing creative industries. Professor Jin Yuanpu introduced concepts as “digital harbor, the internet of things, cloud computing” etc. and described the high-end integration of cultural & creative clusters and international trade.

In order to enhance the practical use of this Report, the Appendix collected cultural & creative industries support fund, leading organizations, industries associations and data sheets reflecting creative industries development in part of cities for reference to readers.

At last, we hope *Chinese Creative Industries Report (2010)* take some new inspirations for our readers. At the same time, we believe that Chinese creative industries are facing with more opportunities in 2010.

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中国创意产业在经济异常困难的情况下逆势而上,科技对创意产业的支撑作用加强,融资难问题也得到部分缓解,国家和地方对创意产业的关注度持续升温;随着我国经济的回升向好,创意产业发展的经济基础和社会环境进一步好转。而《文化产业振兴规划》的出台,是中国创意产业发展的重大利好,创意产业从此迈向国家战略。

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在全球性金融危机的背景下,北京市文化创意产业逆势而上,提前实现“十一五”规划目标,尤其是动漫网游、演出市场、电影票房、古玩与艺术品交易成绩斐然。北京的文化创意产业将在市场推动和政府引导的双重作用下,进一步形成特色鲜明的发展模式,继续保持稳步、健康的增长势头。

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天津市政府面对全球金融危机的冲击,明确提出要加快文化创意产业发展,目前已形成了产业门类比较齐全、拥有近 20 个不同类型产业形态的园区。创意产品精彩纷呈,投融资服务体系逐步完善,滨海新区更是加大了“先行先试”的力度,给创意产业发展带来了思路。

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唐山,这座“凤凰城”,未来以打造“创意唐山”为目标。在发展战略上,把文化建设放到经济社会发展的整体布局中重点推进,实施文化立市战略;在发展思路上,坚持走特色化、差异化、品牌化之路,全力建设文化创意产业集群,培育文化产业品牌,打造文化产业链条。

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太原,晋商之都。2009年岁末,太原市出台《振兴文化创意产业的若干意见》,涉及政府对文化创意产业的整体规划、业态培养、政策扶持、资金帮助、资源整合等内容。这标志着,太原市文化创意产业将从2010年起,迎来一道靓丽的曙光。

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2009年,上海被国务院正式定位为“国际金融中心”和“航运中心”,两个中心的建设和2010年世博会的召开都为上海创意产业注入难得的发展契机。上海正在国内率先示范创意社群的先进理念,还成功申请了联合国教科文组织的“设计之都”,从创意企业到创意社群再到创意之都的实践,这正是中国创意产业发展的渐进阶段。

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2009年,杭州市深入实施“软实力提升”和“服务业优先”战略,着力探索破解文化创意产业融资瓶颈问题,加快打造全国文化创意产业中心步伐。陆续出台财政政策和融资政策,有效缓解了文化创意产业融资难题,优化了产业发展环境。

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青岛为创意产业发展制定本地特色扶持政策,着力打造服务品牌和新媒体平台。面向未来,积极开发青岛本地特色文化,把创意产业作为青岛整体社会提升的“智库”,用创意产业作为拉动青岛整体经济向现代服务业转型的重要引擎。

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郑州是我国八大古都之一,不仅具有悠久的历史 and 丰厚的文化遗存,而且具有中部区域性中心城市优越的科技和教育资源。近年来通过深入实施“文化强市”战略,文化创意产业取得了快速发展,产业及其要素集聚效应日益显现。

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“文化+科技,创意+创新”,是深圳文化创意产业发展的基本经验。政府积极完善投融资政策及服务平台,营造了较为良好的市场环境。“设计之都”品牌建设,已形成政府主导、行业行动、社会参与和全民响应的发展模式。

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2009年,桂林通过举办活动、注入资金、出台举措,使其创意产业进入公众视野。拥有战略区位、山水历史文化、旅游名城威望、国家高新区发展实力、政府政策支持等诸多有利条件,桂林的创意产业正以赶超姿态大步前进。

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四年的进程,创意产业在重庆实现了又好又快发展,在西部具有较好基础,一大批高等院校源源不断地输送各类人才,25家创意产业基地的形成在行业内起到了较好的带头作用和示范效应。重庆市创意产业“十二五”规划的出台,将使政策更加明确,产业布局更为合理,创意产业将迎来更大的跨越。

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西安一直被文化资源大市和文化产业小市的矛盾所困惑。2009年的一系列举措、项目和新发展,正在改变这一窘况。2009年是西安文化创意产业发展进入快车道和获得突破性发展的一年,西安作为国内重要的文化创意产业中心正在崛起。

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金融危机下,我国经济总体回升向好,创意产业在金融危机中逆势上扬。面对金融危机,我国创意产业所处的环境也发生了巨大的变化,其中城市化进程和创意产业的联动、创意企业投融资的问题成为令人关注的重点。

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创意产业已成为经济社会中一支不可忽视的力量,创意产业理论也在与时俱进:现代信息技术在技术层面上引导着创意产业的发展,并间接影响创意产业的人文内涵;创意产业链的衍生模式决定了创意经济的表现形式;我国文化创意产业的发展有赖于发展模式的创新。

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In 2009, Chinese creative industries developed under the financial crisis, the support of science & technology to creative industries has been enhanced, the difficulty of financing has been eased partly and the attention to creative industries from both national and regional level has been much increased. With the recovery of Chinese economy, the economic base and social environment for creative industries have been improved. While the issue of *the Revitalization Plan of Cultural Industry* is significantly positive to creative industries, Chinese creative industries is stepping onto the national strategic level.

Chapter II Beijing: to keep economy growing sustainably by stimulating cultural innovation	(27)
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In 2009, under the background of global financing crisis, the cultural & creative industries in Beijing went against the harsh environment and realized the 11th Five Year Plan's target. The areas of animation and network games, performance market, film ticket office, antique and art works trade performed impressively. Promoting by market and government's guidance, Beijing's cultural & creative industries will keep growing steadily and healthily.

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Facing with the crash of the global financing crisis, Tianjin municipal government clearly proposed to facilitate the development of modern service and cultural & creative industries. Up to now, Tianjin has formed creative parks with 20 various in-

dustrial forms and a scaled creative industries system.

Chapter IV Tangshan: an ecologically creative Phoenix city (69)

Tangshan, the Phoenix city, aimed at forging “creative Tangshan”. In the development strategy, it put the cultural construction into the overall layout of economic and social development to promote; in the development plan, it insists an approach of differentiation and brand strategy and constructs creative clusters in efforts.

Chapter V Taiyuan: a new cultural city transformed from an industrial base (91)

Taiyuan is a city of Jishang (merchants of Shanxi province). On the end of 2009, Taiyuan issued Proposals on Revitalizing Cultural & Creative Industries including government’s overall plan, industrial fostering, policy support, fund support and resources integration to cultural & creative industries. Cultural & creative industries of Taiyuan will develop into a new stage since then.

Chapter VI Shanghai: turning into a creative capital with Expo 2010 as an opportunity (113)

In 2009, Shanghai was positioned as “an international financial center” and “an international shipping center” by the State Council. The construction of “two centers” and Expo 2010 take great opportunities for Shanghai’s creative industries. Besides, Shanghai is firstly demonstrating the advanced concepts of “creative communities” and has successfully applied “Design Capital” of UNESCO. From creative enterprises to creative communities and to creative capital, Shanghai is practising the progressive phases of Chinese creative industries.

Chapter VII Nanjing: the reform of cultural system promotes the steady development of cultural & creative industries (139)

In 2009, Nanjing integrated and promoted cultural & creative industries in a new round. Centered in “ensuring economic growth and promoting transformation”, the reform of cultural system has obtained initial achievements and formed new high-

lights and characteristics.

Chapter VIII Hangzhou: facilitating to forge a national creative industries center (161)

In 2009, Hangzhou implemented strategies of “promoting soft power” and “services industry priority” to probe to solve bottle neck problems of investing and financing for creative industries. Hangzhou successively issued financing policies, which effectively improved the industrial environment.

Chapter IX Wuhu: a rising star in Pan-Yangtze River Delta in developing creative industries (177)

Wuhu's cultural & creative industries actively takes part the development of Pan-Yangtze River Delta and initially integrated with that of Yangtze River Delta. And then it will integrate with the national strategy layout from coast to the interior land. Based on cities group of Yangtze River Delta, the cultural & creative industries is becoming another mainstay industry of Wuhu.

Chapter X Qingdao: to forge a modern blue coastal cultural city (193)

Qingdao provides distinctive support policies for local creative industries and makes efforts to forge service brands and new media platforms. Qingdao actively develops local culture and takes creative industries as a "think tank" of promoting its development. It also takes creative industries as an important engine to facilitate its economy transform to modern services.

Chapter XI Zhengzhou: cultural & creative industries is rising in central China (215)

Zhengzhou, one of 8 ancient capital of China, not only has a long history and rich cultural remains, but also has large resources of scientific & technological and education as a central city of China. In recent years, as it implemented a strategy of building a strong cultural city, the cultural & creative industries developed quickly.

Chapter XII Shenzhen: to increase the city's charming by "culture + science & technology" (233)

"Culture + science & technology" and "creativity + innovation" are basic experiences of Shenzhen's developing cultural & creative industries. The government actively improves investing and financing policies and service platforms to create a better market environment. Up to now, it has formed a developing model of government guiding, industries acting, social participating and public responding.

Chapter XIII Guilin: to building a new creative city by using local resource advantages (255)

In 2009, Guilin organized activities, launched investments and issued initiatives to make its creative industries known by public. With strategic location, landscape historical culture, reputation for a famous tourist city, power of national high-tech zone and government policy's support, the creative industries of Guilin will develop in surprising speed.

Chapter XIV Chongqing: to promote creative industries by exploring potentials of old industrial bases (277)

After 4 years efforts, creative industries developed healthily and quickly in Chongqing. Chongqing has better bases to develop creative industries in western China, as a large number of universities continuously supply various talents and 25 creative parks performed well within the industry. The issue of the 12th Five Year Plan for creative industries of Chongqing makes policies more distinctive and the industrial layout more reasonable, the creative industries will step onto a new stage.

Chapter XV Lijiang: an international showcase of creative industries (293)

By integrating cultural heritages and minorities culture to promote experience cultural tourism, Lijiang realized the connection of creativity and cultural tourism,

folk crafts and performance. Under the coordination of government, enterprises and individuals, Lijiang is building a cultural & creative brand and an international creative platform with the logo of “Lijiang”.

Chapter XVI Xi'an: creative industries are rising on central of western China (315)

Xi'an has been confused by a contradiction of rich cultural resources and poor cultural industries. In 2009, it made a series initiatives, projects and new developments to change the situation. Therefore, the creative industries of Xi'an have made breakthroughs and are rising on central of western China.

Chapter XVII Comments and analysis: to solve difficulties of investment and financing and expand creative industries space (337)

Under the global financial crisis, Chinese economy is recovering in a whole; the creative industries rise against the financial crisis. Facing with the global financial crisis, the environment of Chinese creative industries has been changed greatly. Topics such as linkage between the urbanization and creative industries, and investment and financing for creative enterprises have been the most concerning ones.

Chapter XVIII New viewpoints: probes and thinking to the development of creative industries (359)

Creative industries have been a power in the economical society which cannot be ignored and theories of creative industries are also advancing with the time: modern information technology directs the development of creative industries in the technological level and influencing the meaning of humanities of creative industries; the derivative mode of creative industrial chain leads to the manifestation of creative economy; the development of Chinese cultural & creative industries depends on the innovation of developing mode.

Appendix (395)