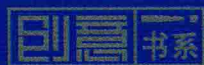




# 创意城市蓝皮书

BLUE BOOK OF CREATIVE CITIES



中国创意产业研究中心

张京成 / 总编

## 北京文化创意产业 发展报告 (2016)

主编 / 郭万超 张京成

副主编 / 沈晓平 陈秋淮 王国华

BEIJING REPORT ON

CULTURAL AND CREATIVE INDUSTRIES (2016)



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# 《创意城市蓝皮书》 总序

张京成

城市是生产力发展到一定阶段的产物，并随着生产力的发展而不断升级。时至今日，伴随着工业文明的推进和文化的提升，以及服务业的大力发展，经济增长方式的转变和产业结构的调整正在推动一部分城市向着一个前所未有的高度迈进，这就是创意城市。

创意城市已经为众多有识之士所关注、所认同、所思考。在全球性竞争日趋激烈、资源环境束缚日渐紧迫的形势下，城市对可持续发展的追求，必然要大力发展附加值高、环境友好、成效显著的创意经济。创意经济的发展实质上就是要大力发展创意产业，而城市是创意产业发展的根据地和目的地，创意产业也正是从城市发端、在城市中集聚发展的。创意产业的发展又激发了城市活力，集聚了创意人才，提升了城市的文化品位和整体形象。

综观伦敦、纽约、东京、巴黎、米兰等众所周知的创意城市，其共同特征大都离不开创意经济。首先，这些城市都在历史上积累了一定的经济、文化和科技基础，足以支持创意经济的兴起和长久发展；其次，这些城市都已形成了发达的创意产业，而且能以创意产业支持和推进更为广泛的经济领域创新；最后，这些城市都具备了和谐包容的创意生态，既能涵养相当数量和水平的创意产业消费者，又能集聚和培养众多不同背景和个性的创意产业生产者，使创意经济行为得以顺利开展。

对照上述特征不难发现，我国的一些城市已经或者正在迈向创意城市，从北京、上海等一线城市，到青岛、西安等二线城市，再到义乌、丽江等中小城市，我们自2006年起每年编撰的《中国创意产业发展报告》一直忠实记录着它们的创意轨迹。今天，随着创意产业的蔚然成风，其中的部分城市已经积累了相当丰富的实践经验以及大量可供分析的数据与文字资料，对其进行专门研究的时机已经成熟。

因此，我们决定在《中国创意产业发展报告》的基础上，逐步对中国各主要创意城市的发展状况展开更加深化、细化和个性化的研究与发布，由此即产生了“创意城市蓝皮书”，这也是中国创意产业研究中心“创意书系”的重要组成部分。希望这部蓝皮书能够成为中国每一座创意城市的忠实记录者、宣传推介者和研究探索者。

是为序。

# Preface to the *Blue Book of Creative Cities*

Zhang Jingcheng

City came into being while social productivity has developed into a certain stage and upgrades with the progress of the productivity. Along with the marching of industrial civilization, cultural development, the growth of the service industry, the transformation of economic growth and the adjustment of industrial structure, cities worldwide have by now entered an unprecedented stage as of the era of creative cities.

Creative cities have caught the attention from various fields these years. While the global competition for limited resources gets heated, sustainable development has become the only solution for cities, which brings creative economy of high added value and high efficiency into this historic stage. Creative industries is the parallel phrase to creative economy, which regards cities as the bases and the core of the development, and cities is also the place where creative industries started and clustered. On the other hand, creative industries helped to keep the city vigorous, attract more talents and strengthen the public image of the city.

From the experiences of world cities such as London, New York, Tokyo, Paris, and Milan, creative economy has been their common characteristic. First, histories of these cities have provided them with certain amount of economic, cultural and technological resources, which is the engine to start and maintain creative economy; second, all these cities have had sound creative industries which can function as a driving force for the innovation and economic growth of the city; finally, these cities have fostered harmonious and tolerant creative ecology through time, which conserves consumers of creative industries, while attracting more creative industries practitioners.

It can be seen that some Chinese cities have been showing their tendency on the way to become creative cities, such as large cities of Beijing and Shanghai, medium-size cities of Qingdao, Xi'an and even small cities of Yiwu and Lijiang, whose development paths have been closely followed up in our *Chinese Creative Industries Report* started in 2006. By now, some cities have had rich experiences, comprehensive data and materials worthy to be studied, thus the time to carry out a special research has arrived.

Therefore, based on *Chinese Creative Industries Report*, we decided to conduct a deeper, more detailed and more characteristic research on some active creative cities of China, leading to the birth of *Blue Book of Creative Cities*, which is also an important part of *Creative Series* published by China Creative Industries Research Center. We hope this blue book can function as a faithful recorder, promoter and explorer for every creative city of China.

# 北京文化创意产业发展报告 (2016)

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## 摘 要

本报告以北京文化创意产业的整体运行、区域动态、要素市场、行业发展等为基本内容,分析了2015年及“十二五”期间北京文化创意产业的整体发展态势,梳理了国家文化产业创新实验区和北京11个区的发展情况,分析了北京文化创意产业人才、资本等要素市场的基本情况,研究了园区功能升级、京津冀文化协同政策,并对文化创意产业的部分行业进行了深入研究。全书共分为四篇:第一篇为综合分析篇,第二篇为区域动态篇,第三篇为专题研究篇,第四篇为行业发展篇。

“综合分析篇”包括3篇文章。其中,第一篇文章在对2015年北京文化创意产业整体运行情况进行系统分析的基础上,总结产业的突出表现,探讨新时期北京文化创意产业面临的形势与挑战,并提出应对新形势的对策建议。第二篇文章全面回顾了“十二五”时期北京文化创意产业的表现,从资源转换效率、供需结构、传统产业生存环境等方面剖析了这一时期产业发展的突出问题,并展望了“十三五”时期产业发展前景。第三篇文章基于北京市2012年投入产出表,运用投入产出模型,通过计算文化创意产业的直接和完全消耗系数、直接和完全分配系数、影响力和感应度系数、生产诱发系数等指标,定量测度文化创意产业与地区经济的关联程度和波及效应,揭示产业的投入结构和产出去向。

“区域动态篇”包括12篇文章。本篇首先对国家文化产业创新实验区两年来的建设情况予以系统梳理,分析总结了实验区的发展措施和主要经验,并提出下一步发展思路。选取东城区、西城区、朝阳区、丰台区、石景山区、海淀区、门头沟区、房山区、通州区、大兴区、怀柔区11个区,对其文化创意产业予以详细分析,梳理2015年各个区的文化创意产业发展基





本态势，分析各自发展路径，总结各区产业发展规律。

“专题研究篇”包括5篇文章。本篇以西城区为例，研究文化创意产业园区功能化升级问题；研究分析北京文化创意产业的人才、资本市场等的表现情况，对创意产业人才培养体系的基本现状、问题与需求、对策与建议等进行了详细的分析研究；从产业与资本市场的融合情况、资本市场表现情况和发展前景等方面对文化创意产业资本市场进行了详细的分析；对北京动画产业的新浪微博及其社会网络进行了专题研究；深入分析了京津冀文化产业协同发展的现实挑战和根本问题，并提出协同发展的政策建议。

“行业发展篇”包括4篇文章。以北京市广播、电视、电影业，软件、网络及计算机服务业，艺术品交易业，动漫产业等为重点研究对象，在分析行业现状、发展特点的基础上深入剖析行业发展存在的问题，对行业未来发展提出了具体对策建议。

# Abstract

Based on Beijing cultural & creative industries overall operation, regional overview, factor market, industries development and so on, this report systematically analyzes the overall development trend of Beijing cultural & creative industries in 2015 and during the period of the 12th Five-year Plan, systematically reviews the development of national culture innovation experiment zones and 11 districts and counties, analyzes the basic situation of factor market as talents and capital of Beijing cultural & creative industries and researches policies of function upgrade of parks and areas, cultural synergy of Beijing, Tianjin and Hebei province as well as part industries of cultural & creative industries. This report includes 4 parts as Part I: comprehensive analysis, Part II: Regional trends, Part III: monographic studies and Part IV: industries development.

Comprehensive analysis includes Chapter I-Chapter III. Based on systematically analyzing the overall operation of Beijing cultural & creative industries, Chapter I sums up the outstanding performance of industries, explores new situations and challenges of Beijing cultural & creative industries in new era and puts forward countermeasures and suggestions. Chapter II reviews the development of Beijing cultural & creative industries during the period of the 12th Five-year Plan, analyzes some main problems at that time and the development prospects in the 13th Five-year Plan. Chapter III quantitatively measured the relationship and spread effects between cultural & creative industries and regional economy based on the input-output table of Beijing in 2012 by applying input-output model to calculate cultural & creative industries direct and complete consumption coefficients, direct and complete partition coefficients, influence and induction coefficients, production induced coefficient and so on.

Regional trends includes Chapter IV-Chapter XV. This part firstly reviews the construction of national experimentation areas in two years, analyzes their



development measures and experience and provides suggestions on its future development. By choosing 11 districts as Dongcheng, Xicheng, Chaoyang, Fengtai, Shijingshan, Haidian, Mentougou, Fangshan, Tongzhou, Daxing and Huairou, this part systematically reviews the development of those districts cultural & creative industries and sums up their development rules by analyzing their basic situations.

Monographic studies includes Chapter XVI-Chapter XX. This part takes Xicheng district as an example and researches the upgrading problem of cultural & creative parks; it also analyzes the talents, capital market of Beijing cultural & creative industries and makes the detailed analysis and study on current conditions, problems, demands, countermeasures and suggestions on creative industries talents cultivation. It also makes an analysis on the capital market of cultural & creative industries from the integration of industries and capital market, the performance and prospect of capital market; in this part, it makes some monographic studies on the social network of sina weibo of Beijing animation industry. In the same time, it deeply analyzes the current challenges and problems in the cultural synergy of Beijing, Tianjin and Hebei and provides policy suggestions.

Industries development includes Chapter XXI-Chapter XXVI. Taking radio, television and film industry, software, Internet and computer services industry, art trade industry, animation industry as key research objects, it provides detailed countermeasures and suggestions for their future based on analyzing their current situation, development features and problems.

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Comprehensive Analysis

## B.1

### 2015年北京文化创意产业 总体运行分析报告

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2015年是“十二五”规划的收官之年，北京文化创意产业发展持续向好，支柱地位更加稳固，发展质量有效提升，在拉动首都经济增长、推动经济转型升级、加快全国文化中心建设中发挥了更大的作用。“十三五”期间，北京将大力推进经济转型升级，努力形成高端引领、创新驱动、绿色低碳的产业体系，在这个过程中，文化创意产业将发挥不可替代的重要作用。适应经济新常态，立足首都城市功能定位，进一步发展文化创意产业将成为推进非首都功能疏解、构建“高精尖”经济结构和建设社会主义先进文化之都的根本要求。

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