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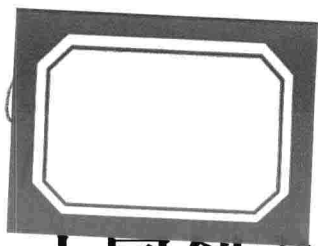
Chinese Creative Industries Report

发展报告 (2014)

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

2013年是全面贯彻落实党的十八大精神的开局之年,是实施“十二五”规划承前启后的关键一年,是为全面建成小康社会奠定坚实基础的重要一年。全年的经济运行态势基本平稳,投资与消费成为拉动我国经济发展的主要动力。具体到轻资产的创意产业领域,文化消费的拉动作用则较投资更为突出。中国作为位居世界第二的新兴经济体,其未来经济增长在客观上要求从投资驱动转向消费拉动。同时,政府也一直不懈追求将消费作为拉动经济增长最主要的长期稳定杠杆。因此,在消费刚性和“调结构、促内需”的政策推动下,消费将保持稳中有升的态势。2013年中央经济工作会议将“扩大消费需求”作为“扩大内需”的重要内容予以强调,表明“扩大内需,刺激消费”仍是2014年的主导方向。有此原则指导,文化消费自然将为创意产业的发展提供持续动力。基于上述,《中国创意产业发展报告2014》将文化消费作为年度主题,重点组织了文化消费拉动创意产业发展效果较为典型的17座城市参加撰稿,兼顾了覆盖主要区域与凸显重点城市的原则。

《中国创意产业发展报告2014》共设19章,分为三个部分。其中,居首章的总报告由中国创意产业研究中心立足全国层面,从文化消费角度切入,对2013年我国创意产业领域发生的重要事件进行了全面梳理与分析,内容选取的依据为各主要媒体的曝光度与关注度。第2章至第18章由17个城市的创意产业领域相关党政主管部门、行业协会、研究机构及高等院校组织骨干人员撰写,集纳了政府主管心得、市场咨询经验、行业发展研究、学术领域思考等多重角度。国务院发展研究中心、南京政治学院、兰州商学院、大连市创意产业协会等单位专家的全新加入,进一步丰富了《中国创意产业发展报告》作者队伍的构成。

本年度报告重点选取了文化消费旺盛、较早发展创意产业的北京、上海、天津等传统直辖市;经济发展水平一直较为发达的南京、杭州、扬州、常州等华东地区城市;深圳和江门等改革开放的先头阵地;在西部大开发中承担重任的成都、西安、兰州等区域中心城市;强劲带动东北老工业基地振兴的哈尔滨和大连以及作为中部崛起战略重镇的武汉、长沙;青岛作为华东地区的重要消费城市

和创意产业桥头堡再次入选本年度报告。最后一章由中关村创意经济研究院对 17 个城市报告进行综合归纳,一方面提炼出各地创意产业的年度共性规律,另一方面对各地精彩纷呈的特点做出系统梳理,与首章总报告遥相呼应,在文化消费的主题下共同呈现 2013 年中国创意产业的发展概貌。在附录部分,我们整理了 2006 年以来中央及地方层面的创意产业主要相关研究项目,力求从专业科研的角度展现创意产业在中国的发展脉络,并为专业读者提供相关项目申报及研究的信息参考,也为相关政府部门与基金立项查重提供依据。

弹指一挥,八载飞逝。《中国创意产业发展报告》已连续出版至第九本,较为完整地记录了创意产业在我国主要地区的发展历程。回首过往,许多机构也曾就相关领域出版过类似书籍、申请过相关课题,但或偶一为之,抑或不了了之,能够长期坚持下来的已经屈指可数。在此起彼伏的喧嚣中,《中国创意产业发展报告 2014》能够如期付梓,也属不易。正是读者的信任和各地合作者的支持一路伴随我们成长。值得欣慰的是,《中国创意产业发展报告》的城市分册——《创意城市蓝皮书》系列(社会科学文献出版社,第九本即将出版)也已经花团锦簇。在此,衷心欢迎更多城市的相关政府部门、高校、科研机构 and 专家学者成为我们的合作伙伴,共同推进创意产业在中国的可持续发展。

Foreword

The year of 2013 marks the beginning of an age to implement the principles of the 18th CPC National Congress and also the key period of the “12th Five-year Plan”, which will make it an important period to usher China into an age of becoming an all-round well-off society. The general economic situation was quite stable in 2013, with investment and consumption becoming the major impetus of Chinese economy. In terms of creative industries, cultural consumption has been playing a more important role compared with investment. As the second largest emerging economy of the world, China’s economic prospect shall be more consumption oriented rather than investment, which is what the Chinese government aiming at. Thus, consumption shall be steadily growing in China. The Central Economic Working Conference 2013 reiterated the importance of “expanding the demands of consumption” as the major part of “expanding domestic demands”, which makes it still the guideline of the economic development in 2014. Under this backdrop, cultural consumption will no doubt keep acting as the core driving force of the development of creative industries. “Cultural consumption” is the key word of Chinese Creative Industries Report 2014, which contains experiences of the top 17 cities in terms of creative industries development, covering the major parts and also the key cities of China.

Chinese Creative Industries Report 2014 has 19 chapters in three parts. The first chapter is a general introduction to the national situation of creative industries development in China, from the perspective cultural consumption. It summarizes the key events in creative industries of China in 2013, based on the exposure from the major media. Chapters 2 to 18 are compiled by experts and scholars from respective government offices, industrial associations, research institutes and universities of the 17 cities. The joint efforts from Development Research Center of the State Council, Nanjing Political College,

Lanzhou University of Finance and Economics, Dalian Creative Industries Association and R&R Investment Management Co., Ltd. have also enriched the book and the structure of the compilers.

This report pays special attention to the key cities of China. Firstly, they are Beijing, Shanghai and Tianjin, the municipalities directly under the central government, where cultural industries started earlier and cultural consumption has been vigorous. Then it is the cities in east China, Nanjing, Hangzhou, Yangzhou and Changzhou, where the economic development has been fairly fast, and Shenzhen and Jiangmen, the cities that were first opened up. Then it is Chengdu, Xi'an and Lanzhou, which have been playing a key role in the Development of the West Regions, Harbin and Dalian, which represent the old industrial bases, and Wuhan and Changsha, the key cities in central China. Qingdao, as an important consumption city in this report for a second time. The last chapter is compiled by Zhongguancun Creative Economic Research Institute, which does a comprehensive summary for the 17 cities. This chapter draws a conclusion of the common principles among these cities in terms of creative industries development in 2013 and also summarizes the individual characteristics of these cities, which makes this chapter a perfect ending for the book, as like the first chapter it offers a comprehensive view of creative industries development in China from the perspective of cultural consumption. In the appendix of this report, a list of the major research projects from various levels of the government is offered, which provides readers with a clear clue of the development stages of creative industries in China, and it also functions as a great reference for the research-oriented readers and government offices when launching new projects.

Chinese Creative Industries Report has been issuing its ninth volume, which has kept a complete record for the development of creative industries in China. Looking back on the past eight years, it is undeniable that various organizations or institutes also did similar works, but few lasted to now. Chinese Creative Industries Report has paid great endeavors to make it what it is like today, with the great support and trust from the readers and partners. Now, the city book of *Chinese Creative Industries Report*, *Blue Book of Cre-*

ative Cities, is also going to issue its ninth volume by Social Sciences Academic Press. It is a great honor to hereby invite government offices from more cities, universities, research institutes, experts and scholars to work with us as partners to shed joint efforts to strengthen the continuous development of creative industries in China.

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前 言

第一章 总报告:文化消费拉动中国创意产业持续发展 (1)

党中央、国务院在 2013 年对文化建设和文化产业做出了一系列重大战略部署,宏观经济平稳运行,为创意产业的发展营造了良好环境。在文化消费的拉动下,我国创意产业持续向好发展,在电影、电视、新闻出版、动漫游戏、互联网服务、文化演出、艺术品交易、旅游休闲以及广告会展等诸多领域频现亮点,呈现许多新现象、出现不少新情况。

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文化创意产业已经成为北京市主体经济格局的重要支撑。为落实十八届三中全会“建设现代文化市场体系”的战略部署,北京不断完善文化创意产业布局;借助文化创意产业功能区建设进一步强化产业支柱地位,创新文化创意产品体系,提高政策扶持水平与体制机制配套能力,全面提升北京市的文化市场规模与文化消费质量。

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2013 年,天津文化创意产业发展有了较大的进展。主要特点为:民营文化创意企业异军突起,产品跻身国内外市场;海峡两岸文创产业合作达到新的高度;文化和科技融合发展成效显著;“双核城市”文创产业发展格局初步形成。但是,天津人均文化消费增长却均低于全国水平,这从一个侧面反映出天津居民文化消费倾向的不足。

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范,产业规模加速扩大;二是产业实力稳步提升;三是产业趋势走向特色、前沿、创新;四是大连文创产业亮点不断。大连文化消费市场也渐入佳境,但文化创意产业和文化消费的“顶层设计”应重点加强,切实做好战略布局、政策扶持、平台搭建和先扶后奖等工作。

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2013年,哈尔滨市全面贯彻落实十八大精神,按照加强“文化名城”建设的战略部署和建设国际化现代城市的总体要求,积极构建促进哈尔滨市文化产业快速发展的优良环境,文化产业总量规模逐渐增大,使之逐步成为国民经济新的增长点。哈尔滨市注重文化消费中的城市特色表达,积极推动文化产业快速发展。

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因位于我国改革开放的前沿,再加上原有海派文化中“海纳百川”的特点,决定了上海文化具有国际化时尚的色彩和引领全国时尚消费的特征。上海是我国的时尚中心,在2013年上海文化创意产业发展报告中,时尚创意第一次以独立的产业门类出现。上海的时尚创意业将引领中国其他城市的发展。

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常州深厚的历史文化底蕴、良好的科教文化优势、和谐的经济社会环境,为文化创意产业优先发展提供了优质土壤。文化创意产业逐渐在促进文化消费、打造文化精品等方面彰显主导优势,渗透于经济发展、科技创新、城市建设和社会进步的全过程,正成为常州经济发展和城市转型升级的重要引擎。

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扬州实施以文兴城战略,大力发展文化产业。全市文化产业增加值占全市地区生产总值的比重进一步提高。扬州文化产业亮点纷呈,其中雕版印刷、工艺美术声名远播,文博城建设成为标志。城镇居民文化消费快速增长,促进了文化产业的快速发展。

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以满足市民日益增长的精神文化需求为目标,青岛市在2013年重点实施文化产业、公共文化服务和文艺精品创作、文化人才培养和引进“三大跨越工程”,文化产业的整体实力和竞争力明显提升,为青岛率先科学发展、实现蓝色跨越,建设现代化国际宜居城市做出了新的贡献。

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2013年,武汉市进一步释放文化消费潜力,促进文化与科技深度融合,以坚实的步伐推动文化产业向着“超倍增”发展的目标迈进。武汉以建设国家级文化和科技融合示范基地为契机,进一步完善了顶层设计、细化了政策措施、落实了一批重大项目、优化发展环境,成立了武汉文化科技研究院,继续打造“文化五市”。

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长沙市以创作、创造、创新为根本手段,以文化内容、创意成果和知识产权为核心价值,以高新技术为重要支撑,以文化消费与文化贸易为拉动,大力发展文化创意产业,在广播影视、出版发行、演艺娱乐、动漫游戏、文化旅游等领域形成全国性优势,“区域性文化创意产业中心”逐步形成,并不断向高端化、数字化、网络化和信息化发展。

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深圳作为改革开放的前沿城市,在文化创意产业蓬勃发展的同时,文化出口的势头日益强劲。2013年12月,深圳创意信息港正式被文化部命名为国家对外文化贸易基地,该基地是深圳继文博会、文交所、中国文化产业投资基金后的第四个国家级文化产业平台,将为深圳文化贸易的升级再添新引擎。

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江门市历史源远流长,素有“中国第一侨乡”之称。文化消费特色鲜明,文化创意人才队伍庞大、艺术创作成果丰富,具备文化产业健康发展的良好基础。截至2013年,江门市已经初步形成了出版发行、印刷复制、文化会展、文化旅游、广播影视、工业设计、动漫、古典家具等为主的文化创意产业体系。

第十六章 成都:繁荣蓉城文化消费市场,驱动文化创意产业发展 … (365)

2013年,成都文化创意产业进入向城市经济支柱性产业目标迈进的关键之年。围绕建设中西部最具影响力、全国一流和国际知名的“文化之都”,成都以改革创新为动力,加快促进文化创意产业转型升级。在新一轮发展周期中,成都将不断优化文化消费驱动文化创意产业发展的模式,进一步提升文化创意产业竞争力。

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西安市高度重视发挥文化创意产业作用,在2013年积极扩大文化消费规模,健全现代文化市场体系,进一步解放和发展文化生产力;出台了《保持消费市场平稳可持续发展的若干意见》和促进旅游业发展的具体措施;临潼国家旅游度假区等重大旅游项目的顺利进展,有效化解了西安消费市场增长趋缓的影响。

第十八章 兰州:大力发展文化创意产业,打造西北文化消费中心 … (417)

根据华夏文明传承创新区“1313”工程的相关布局,2013年兰州市文化创意产业以文化产业园区基地建设为依托,重点发展了文娱演艺、出版发行、广播影视、文化旅游、创意设计、数字多媒体等行业。其中,数字多媒体产业成为文化消费的新亮点,旅游消费逐步成为文化消费增长的支撑点,节庆活动逐步成为促进文化创意产业发展的特色点。

第十九章 评析:文化消费成为我国创意产业发展强力引擎…………… (439)

2013年,我国文化消费的增长,逐步成为拉动文化创意产业发展的主要动力。各地文化创意产业状况普遍发展良好,新兴文化业态表现抢眼,助推文化创意产业发展再上新台阶。各个城市的文化消费迎来新一轮的增长,尤其是新业态文化需求十分强劲,有力地促进了我国文化创意产业的全面发展。

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Foreword

Chapter I General Report: Cultural Consumption Promoting the Continuous Development of the Chinese Creative Industries (1)

In the year of 2013, the Party Central Committee and the State Council worked out a whole range of key strategic plans for cultural construction and the development of cultural industries. The economic situation was fairly stable, which has provided a better environment for the development of macro economy of China. With cultural consumption as the driving force, the creative industries of China has been developing at a nice level, with great achievements in the fields of film making, TV program production, publishing, animation, internet service, performance, art trade, tourism, advertising and exhibition etc.

Chapter II Beijing: Optimizing the Overall Arrangement of Cultural and Creative Industries to Promote the Cultural Consumption Level of Beijing (31)

Cultural and creative industries have been one of the pillars of the economy of Beijing. To fully implement the strategic plan of "Building a Modern Cultural Market" of the 3rd Plenary Session of the 18th Central Committee, Beijing has been trying all out to optimize its overall arrangement of its cultural and creative industries and to enhance the pillar position of cultural and creative industries by constructing functional zones of cultural and creative industries, so as to innovate cultural and creative industries, strengthen policy support, enlarge the cultural market of Beijing and promote the cultural consumption level of Beijing.

Chapter III Tianjin: Enhancing Cultural Consumption Power by the Pattern of “Dual-core City” (53)

In the year of 2013, the cultural and creative industries of Tianjin experienced great development. The key characteristics are: private-owned cultural enterprises have been rising fast and some have already explored overseas market; cooperation with Taiwan province has greatly grown; culture has been greatly merged into science and technologies; the pattern of “Dual-core City” has been born. However, the cultural consumption growth per capita is lower than the national level, which shows that cultural consumption in Tianjin has a long way to go.

Chapter IV Dalian: Aiming to Transform Itself into a Smart City Through Innovation (73)

The development of cultural and creative industries in Dalian has shown four typical characteristics: the development has been growing more standard and the scale has been growing fast; the strength of the industries has been growing steadily; the trend of the industries has been more characterized and innovative; more achievements have been emerging. The cultural consumption market has been developing into a stable stage, but the “top-level design” of the industries and cultural consumption should be strengthened, to perfect the strategic design, policy support, platform building and “awarding after support” system.

Chapter V Harbin: Promoting the Development of Cultrual Industries by Leading the Cultural Consumption of the Ice City (99)

To fully implement the guidelines of the 18th Congress of the CPC and to build Harbin into a cultural city of world reputation, the city has been vigorously constructing an environment that is good for the development of cultural industries in Harbin and the volume of cultural industries, which has become a new growth zone of the economy. Harbin has been paying much attention to

the characteristics of cultural consumption to accelerate the growth of cultural industries.

Chapter VI Shanghai: Strengthening the Leading Position of Cultural and Creative Industries by Leading the Fashion Trend in China ...
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Due to the fact that Shanghai is among the earliest that was opened up to the outside world and its time-honored “melting pot culture”, Shanghai has been among the international cities of fashion and has also been leading the fashion of China. As the fashion center of China, the industry of fashion and design of Shanghai for the very first time made its debut in the report of Shanghai cultural and creative industries in 2013.

Chapter VII Nanjing: Cultural Consumption Promoting the Development of the Noted Creative Industries Parks Towards a Deeper Level
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Nanjing paid special attention to optimize cultural consumption and environment, and the construction of scientific clusters, which promoted the integration of culture, technology, tourism and people’s daily life. Nanjing has also attached great importance to talents and experts. In 2013, the cultural consumption of Nanjing has been steadily growing and ranked No.1 among the cultural and technological integration zones.

Chapter VIII Changzhou: Building A Modern Demonstration Zone by the Development of Cultural and Creative Industries (167)

Changzhou enjoys great history, culture, education and economic environment, which offers great soil for the development of cultural and creative industries. Cultural and creative industries has been showing its great significance in promoting cultural consumption and building cultural products. Cultural and creative industries has also been playing a key role in economic development, scientific innovation, city construction and social development and