

创意书系
中国创意产业研究中心

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中国

创意产业

Chinese Creative Industries Report

发展报告 (2013)

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

Chinese Creative Industries Report

(2013)

主 编 张京成

副主编 刘利永 蒋金洁



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北 京

图书在版编目 (CIP) 数据

中国创意产业发展报告. 2013/张京成主编.

北京: 中国经济出版社, 2013. 3

ISBN 978-7-5136-2468-8

I. ①中… II. ①张… III. ①文化产业—研究报告—中国—2013 IV. ①G124

中国版本图书馆 CIP 数据核字 (2013) 第 074024 号

责任编辑 严 莉

责任审读 霍宏涛

责任印制 常 毅

封面设计 任燕飞设计室

出版发行 中国经济出版社

印 刷 者 北京市昌平区新兴胶印厂

经 销 者 各地新华书店

开 本 710mm×1000mm 1/16

印 张 34. 5

字 数 529 千字

版 次 2013 年 3 月第 1 版

印 次 2013 年 3 月第 1 次

书 号 ISBN 978-7-5136-2468-8/G · 2011

定 价 78.00 元

中国经济出版社 网址 www.economyph.com 社址 北京市西城区百万庄北街 3 号 邮编 100037

本版图书如存在印装质量问题, 请与本社发行中心联系调换(联系电话: 010-68319116)

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服务热线: 010-68344225 88386794

前言

《中国创意产业发展报告 2013》又如期与读者见面了,自 2006 年以来,这已是连续第八本记录中国创意产业发展轨迹的蓝皮书。

2012 年,对于中国创意产业来说,是具有里程碑意义的一年。中国共产党第十八次全国代表大会召开,胡锦涛总书记在十八大报告中提出,确保到 2020 年实现全面建成小康社会宏伟目标;其中,文化产业要成为国民经济支柱性产业,要发展新型文化业态,提高文化产业规模化、集约化、专业化水平。作为软实力的象征,文化创意产业被进一步提升到国民经济支柱产业的地位,承载着国家经济发展方式转变、产业结构升级和华夏文明传承与创新的重大历史使命。

2012 年,又是中国创意产业发展取得重大突破的一年。5 月 18 日,科技部、中宣部、文化部、广电总局、新闻出版总署五部门联合发布了国家级文化和科技融合示范基地名单,北京中关村国家级文化和科技融合示范基地、上海张江国家级文化和科技融合示范基地、深圳国家级文化和科技融合示范基地等 16 家成为首批入围者。文化和科技融合示范基地,代表我国创意产业发展的最高水平,对我国创意产业发展有着重要的引领和示范作用。16 个基地的认定和建设,发出了五部门联合推动创意产业发展的强烈信号,标志着部门之间创意产业管理协同机制的建立,同时也意味着我国在推动创意产业发展方面迈出了合力推动的重要一步。这一举措对于更好地引导和推动各地文化和科技融合,增强文化领域科技实力和自主创新能力,促进我国文化创意产业持续健康快速发展都具有重要意义。

鉴于首批 16 个国家级文化和科技融合示范基地对于创意产业发展的重要意义,《中国创意产业发展报告 2013》选择了以“基地建设”作为年度主题,瞄准 16 个文化创意产业领军城市的国家级文化和科技融合示范基地,以总报告为引领,以城市为载体,以基地为核心,以城市对比分析为补充,形成了内容全面、重点突出、点面结合的本年度发展报告。希望能够通过对 16 个基地及其所在城市创意产业发展的系统解析,使读者对我国创意产业的发展前沿有深入的认识

和全面的把握。

从体例上来看,《中国创意产业发展报告 2013》仍基本延续了往年的框架结构:第一部分为第一章,即总报告“文化与科技融合引领中国创意产业发展”,对2012年全年中国创意产业发展的环境、现状、进展、热点、趋势等进行了全面总结;第二部分是第二章至第十七章,系统总结了16个国家级文化和科技融合示范基地及其所在城市的创意产业发展情况;第三部分是第十八章,主要对所选16个城市与基地的发展进行了比较与评析,使读者能够从横向对比上对16个基地城市有宏观上的认识。最后,我们整理了2006年以来历年《中国创意产业发展报告》的内容简介,作为附录,供读者参考。

《中国创意产业发展报告》连续八年跟踪观察中国创意产业的发展,不懈的坚持源于社会的需求和读者的信任,我们会一如既往地这份事业进行下去。同时,作为本书城市分册的《创意城市蓝皮书》系列出版计划已经全面启动,欢迎各城市的相关政府部门、高校、科研机构和专家学者加入,我们将乐意提供力所能及的帮助。

Foreword

Chinese Creative Industries Report (2013) was published as scheduled. It was the 8th blue book recording Chinese creative industries development since 2006. To Chinese creative industries, 2012 was a milestone year. On the 18th National Congress of the Communist Party of China, General Secretary Hu Jintao put forward that China will strive to complete the Building of a Moderately Prosperous Society in All Aspects by 2020. And the cultural sector should become a pillar of the economy and develop new forms of cultural operations, and make cultural operations larger in size and more specialized. As the symbol of the cultural soft power, the cultural & creative industries will take a great historic mission of promoting national economic development mode transformation, the industrial structure upgrade and Chinese civilization's inheritance and innovation. In 2012, Chinese creative industries made a major breakthrough. On May 18, 2012, Ministry of Science and Technology, the Central Propaganda Department, Ministry of Culture, the State Administration of Radio, Press and Publication jointly released the first batch of national culture and science & technology integration demonstration bases including 16 bases as Beijing Zhongguancun National Culture and Science and Technology Integration Demonstration Base, Shanghai Zhangjiang National Culture and Science and Technology Integration Demonstration Base, Shenzhen National Culture and Science and Technology Integration Demonstration Base, and so on. Culture and Science and Technology Integration Demonstration Bases are on behalf of the highest level of Chinese creative industries and play an important role of guidance and demonstration. The recognition and building of 16 bases means that the start of creative industries collaborative management mechanism among different departments and an important step on developing creative industries.

Therefore, directed by the General Report, *Chinese Creative Industries Report (2013)* takes “building of bases” as its annual subject, cities as its carrier, bases as its core and cities comparative analysis as its supplement and forms this annual report with contents of all respects and prominent points. We hope our readers will have deep understanding and comprehensive grasping to Chinese creative industries by systemic analysis of 16 bases and cities they belong to.

On the style, *Chinese Creative Industries Report (2013)* continued the previous frame: the 1st part is Chapter I, which is the General Report “the Integration of Culture and Science & Technology leads the Development of Chinese Creative Industries”. In this part, it makes a general summary to Chinese creative industries develop environment, status, progress, hot points, trends, etc. in 2012; the 2nd part is from Chapter II to Chapter XVII, it systemically summarizes the development of 16 national culture and science and technology integration demonstration bases and those cities they belong to; the 3rd part is Chapter XVIII, it makes comparison and analysis on 16 cities and bases. Finally, we combed the brief Introduction of *Chinese Creative Industries Report* since 2006 and made it as an appendix to be reference to our readers.

Chinese Creative Industries Report has been released in eight successive years. Tracking and recording Chinese creative industries development have become our responsibility and mission and we will continue this undertaking as always. In the meanwhile, the publishing project of *Creative Cities Blue Books* has been started, welcome to be our partners and we can do what we can do for you!

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前 言

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作为国民经济支柱产业,2012年我国文化创意产业保持持续高增长,成为引领经济发展的新引擎。文化与科技融合成为创意产业发展的主旋律,示范基地的建设,新业态的迅猛增长,引领创意产业高端化发展;同时创意产业加速向传统产业渗透,逐步提升传统产业附加值;创意产业国际竞争力不断提升,文化产品出口快速增长,文化走出去取得新突破。

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2012年,北京文化创意产业继续领跑全国,重点行业和龙头企业的竞争力和国际影响力持续提高。科技创新促进了北京创意产业高端化进程,创意产业不断获取新的发展能量,文化的附加价值获得极大提升。与此同时,日益强大的文化消费能力刺激着北京创意产业的发展繁荣,日渐提速的国际化步伐则对北京创意产业竞争力提出了更高的要求。

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随着“十二五”的全面展开和天津北方经济中心地位的确立,文化创意产业在天津的经济结构战略转型过程中扮演了越来越重要的角色。将文化创意产业提升为天津经济支柱产业的战略为天津文化创意产业大发展提供了巨大空间。通过将文化创意产业纳入科技发展规划扶持范畴和利用金融创新支持产业发展等手段,天津的文化创意产业与科技融合速度明显加快。

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中央、浙江省委关于文化改革与发展的重要决策部署,积极顺应文化科技加速融合的趋势,在推动文化创意产业发展和打造全国文创中心过程中,取得了新成效,为全市经济转型升级作出了应有贡献。

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To Chinese creative industries, 2012 was a milestone year. On the 18th National Congress of the Communist Party of China, the cultural & creative industries become a pillar of the economy and will take a great historic mission of promoting national economic development mode transformation; The recognition and building of 16 bases means that the start of creative industries collaborative management mechanism among different departments and an important step on developing creative industries. The cultural foreign market entry strategy has been continuing and Chinese cultural influence has been obviously improved. With multiple positive elements, the creative industries would be a dazzling pearl in the national economy.

Chapter II Beijing: to Forge a High – end Cultural & Creative Industrial Base and Establish a Benchmarking for the Integration of Culture and Science & Technology (39)

In 2012, the creative industries of Beijing were still in the head of the whole country and the international influence and competitiveness of key trades and leading enterprises kept on improving. The scientific & technological innovation promoted the process to the high – end of Beijing's creative industries by obtaining new energy and improving added values. In the mean time, the increasingly powerful cultural consumption stimulated the development of Beijing's creative industries as the increasingly internationalization step put forward higher requirements.

Chapter III Tianjin: Insisting on the Mode of “Culture + Creativity + Science & Technology” and

Forging a High – end Cultural & Creative

Industrial Gathering Place (73)

As the full play of “the 12th Five – year Plan” and the establishment of north economic center, Tianjin’s cultural & creative industries plays a more and more important role in the economic development mode transformation. The strategy of promoting cultural & creative industries as the economic pillar industry brought a huge developing space for Tianjin. And the integration of culture and science & technology was greatly accelerated by putting cultural & creative industries into the category of science and technology development support planning and financial support planning.

Chapter IV Shenyang: Driving by Culture and Science & Technology and Leading the Industrial

Transformation and Upgrade (105)

In recent years, Shenyang has taken the creative industries as a new pillar industry and economic growth point to build by implementing strategies as constructing “a strong cultural city”, “a science and education encouraging city” and “a self innovative city”. Shenyang put its efforts on the five industrial clusters and 20 creative industrial parks. With the improving cultural and scientific & technological environment, Shenyang has become the pilot city of national comprehensive reform of cultural system and the national innovative pilot city.

Chapter V Harbin: to Improve Cultural Industries’ Competitiveness by the Integration of

Culture and Science & Technology (131)

In 2012, depending on constructing a famous cultural city, Harbin strengthened the creative development of cultural resources and promoted the creative industries to form a reasonable regional layout by the integration of culture and science & technology. The key cultural construction projects played a more important role, the accu-

mulative effect of clusters was obvious and the emerging cultural forms developed quickly. On the support platform of the national level culture and science & technology integration demonstration base, Harbin is actively promoting the cultural industries with leapfrog development and improving the competitiveness of culture.

Chapter VI Shanghai: the Stage of International Creative

Industries Large Projects (153)

As the forefront of China's reform and opening up, Shanghai owns itself's culture style. In recent years, directed by the strategy of "driving by innovation, developing by transformation", the creative industries have gotten great development and attracted some international creative industries large projects. In 2012, the smoothing operation of Shanghai Disneyland Park and the successful start of Oriental Dream Works became milestones in the history of Chinese creative industries.

Chapter VII Changzhou: the Integration of Culture and

Science & Technology Supported the

Development of Creative Industries (179)

On the subject of scientific development and accelerating the transformation of economic development mode, Changzhou's cultural industries encourage the combination of science & technology and cultural contents under the guidance of innovation. Changzhou paid more attention to the integrating requirements of enterprises development and the whole trades' development and promoted cultural industries connotation to a leapfrog development.

Chapter VIII Hangzhou: Culture Lights up Science &

Technology, Science & Technology Supports

Culture (209)

In 2012, Hangzhou made a deep implementation on constructing the innovative strategy and improving the capability of independent innovation. In that year, Hangzhou made new achievements on developing cultural & creative industries and constructing a national cultural & creative center by actively conforming to the trend of

the integration of culture and science & technology.

Chapter IX Hefei: the Cultural Industries Became the Most Powerful Driving Force for the Construction of “A Famous Lake City and the Highland of Innovation” (237)

Based on profound cultural accumulation and a good economic base, Hefei tried its best to develop characteristic city cultures like creative planning, exhibition expo, cultural tourism, leisure culture and so on. Hefei also made efforts on emerging cultural industries like animation games, digital films & TVs and internet cultural services and promoted Hefei's cultural industrial in a whole by accelerated the integration of culture and science & technology.

Chapter X Qingdao: to Improve the Industrial Innovative Capability by Promoting the Integration of Culture and Science & Technology (259)

As the gathering city of famous brands and marine resources of culture and science & technology, one of the first demonstration cities of national modern service industries and the pilot cities, Qingdao made full use of advantages of culture and science & technology to promote the integration of culture and economy, society, science & technology, ocean and tourism to upgrade the cultural & creative industries. The construction of “national – level culture and science & technology integration base” became a good opportunity for Qingdao to accelerate the development of cultural & creative industries.

Chapter XI Wuhan: Creativity Leading the City's Brand Building, Innovation Promoting Cultural & Creative Industries Development (289)

Taking the construction of “Five Cultural Cities” and a strong cultural city as the overall goals, the promotion of cultural and scientific & technological innovation as the subject, the upgrade of traditional cultural industries and fostering of emerging

cultural industries as the breakthrough, Wuhan has established a “one zone with multiple parks” system centered Donghu National Independent Innovation Demonstration Zone and carried on 10 demonstration projects like national culture and science & technology protection, “engineering design capital” and so on.

**Chapter XII Changsha: “Cultural Xiang Army” Leading the
Prosperity of Cultural & Creative Industries (317)**

As the engine of cultural reform, the integration of culture and science & technology provided powerful support for the improving of cultural soft power, city’s competitiveness and international influence of Changsha. Under the appeal of the 18th National Congress of the Communist Party of China, Changsha created the unique “Hunan Cultural Phenomenon” including the “Cultural Xiang Army” and led the prosperity of cultural & creative industries.

**Chapter XIII Shenzhen: the Integration of Culture and
Science & Technology Boosting the Prosperity
of Cultural & Creative Industries (353)**

In 2012, Shenzhen formally declared that it would step into “a strong cultural city” from “a cultural city” by continuing to support cultural & creative industries, improving policies and investment environments. The integration of culture and science & technology has made remarkable achievements and promoted the core competitiveness of cultural & creative industries.

**Chapter XIV Chongqing: Accelerating the Integration of Culture
and Science & Technology and Building a Creative
Industrial Center of the Upper Yangtze River (385)**

In 2012, by combining with the industrial structure’s characteristics, Chongqing transferred its layout to highlights and characteristics building from the basic idea of making a solid foundation and all-round development of creative industries. By highlighting the dominant position of industrial design and strengthening the integration of culture and science & technology, Chongqing has made remarkable achievements