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Chinese Creative Industries Report

发展报告 (2012)

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

(2012)

主 编 张京成

副主编 沈晓平 刘光宇



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前言

2012年春天到来之时,我们完成了记录中国创意产业发展轨迹的第七本年度报告——《中国创意产业发展报告2012》。

过去的2011年是中国创意产业继往开来的一年,党的十七届六中全会审议通过了《中共中央关于深化文化体制改革推动社会主义文化大发展大繁荣若干重大问题的决定》,提出要全面实施文化强国战略,到2020年,使文化产业成为国民经济支柱性产业,整体实力和国际竞争力显著增强。文化、创意被列为国家战略,既是我国党和政府顺应国际文化软实力激烈竞争的主动选择,也是我国创意产业自身发展到了一定阶段、产业竞争力不断增强、产业发展潜力逐步显现的必然结果。

在十七届六中全会带动下,各级政府积极贯彻落实中央决定,根据地方创意产业发展阶段、特征以及宏观环境,制订了各自的发展规划、行动计划、支持政策等。已有部分城市先行一步,将发展文化、创意作为城市战略,例如北京市进一步提出建设“社会主义先进文化之都”,哈尔滨提出“文化名城”建设目标,天津要建设“中国北方文化创意产业中心”等。从中可见,文化、创意正在成为我国各个主要城市的战略目标,成为城市竞争力的一个重要抓手。

为反映2011年全国主要城市创意产业的发展历程,并以此了解全国情况,《中国创意产业发展报告2012》内容框架延续前几年模式:通过若干城市创意产业的发展反映全国状况和趋势,并特别关注了长江三角洲城市群创意产业的崛起。全书选取15个城市,围绕“科技与文化融合发展”的主题,详细阐述这些城市创意产业发展现状,总结经验,分析面临的问题,探索解决方案。这15个城市既有北京、上海等创意产业先导城市,又有哈尔滨、深圳、杭州、西安等区域性创意产业中心城市,并将上海、常州、苏州、扬州、杭州、绍兴等长江三角洲城市群的主要城市作为特别关注对象,分析创意产业在推动区域联动发展方面所发挥的作用。

《中国创意产业发展报告2012》基本框架仍为三大部分:第一部分为第1章总报告“中国创意产业规范前行有序发展”,全面系统地分析了2011年中国创

意产业发展的宏观环境、发展成就、热点事件等相关问题。第二部分系统梳理北京、天津、呼和浩特、哈尔滨、上海、常州、苏州、扬州、杭州、绍兴、临沂、洛阳、深圳、昆明、西安 15 个城市创意产业的发展情况,并给予比较评析,包括第 2 章~第 17 章。第三部分即第 18 章对过去一年国内外创意产业研究的一些新观点、新思考予以发布;2011 年,作为创意双翼的文化与科技融合发展成为创意产业研究的新热点,从融合科技的文化创意产业定义,探讨文化与科技之间的关系,对文化产业、创意产业和创意经济概念的重新审视,到云文化、微创新与社会网络市场对未来创意的影响,文化资源的市场创意开发模式等,无不透露着业内学者对创意产业前沿命题的深入思考,也为我们在创意社会中前行带来启迪。

《中国创意产业发展报告》已经走过了七个年头,其中涉及了 60 多个城市创意产业的研究,部分城市已经积累了相当丰富的实践经验以及大量的数据与文字资料,对其展开更加深化、细化和个性化的研究和发布已经十分必要。因此,我们决定在《中国创意产业发展报告》的基础上,联合各相关城市的管理人员、研究人员,共同编辑出版《创意城市蓝皮书》,作为中国创意产业研究中心“创意书系”的重要组成部分,2011 年已经出版了《北京文化创意产业发展报告》和《青岛文化创意产业发展报告》。欢迎更多的城市加入到《创意城市蓝皮书》系列出版计划,相信更多的城市都会成为“创意城市”。

Foreword

As the spring drawing upon in 2012, we have finished the seventh blue book as a record of the development of the Chinese creative industries, *Chinese Creative Industries Report (2012)*.

2011 has marked a special year for the development of the Chinese creative industries, with the Sixth Plenary Session of the 17th CPC Central Committee voting through *Decisions of the Central Committee of the Communist Party of China on Deepening the Reform of Cultural System and Promoting the Cultural Development and Prosperity*. The Decisions have put forward a national strategy for cultural development, aiming at successfully transforming cultural industries into the pillar industry of China by 2020 and greatly enhancing the strength and international competitiveness of China. The choice of listing culture and creativity into our national strategy is a must in the era of the international competition of soft power and a natural path that the ever-growing and stronger creative industries of China have been taking us to.

Under the backdrop of the Sixth Plenary Session of the 17th CPC Central Committee, governments of various levels have enacted their respective development plans and policies in concordance with the local characteristics. And some cities have even taken a further step by writing cultural development into the city development strategy, with Beijing for “Socialist Advanced Cultural Center”, Harbin for “A Famous Cultural City” and Tianjin for “Cultural and Creative Industries Center of North China” etc. Creativity has taken a leading role in the transformation of major cities.

Chinese Creative Industries Report (2012) has followed the model of the previous ones, to present a macro picture of the development of creative industries in the major cities of China, by giving a detailed illustration of the 15 chosen cities of China, with special attention attached to the cities in the Yangtze River Delta. Sticking to the theme of “the integral development of science, technology and culture”, the *Report* has done a comprehensive job in going into the details of the current state, experience and lessons, problems to be tackled and the solution of these cities, which range from first-tier cities like Beijing and Shanghai to second-tier cities as Harbin, Shenzhen, Hangzhou, Xi'an and etc. Cities in the Yangtze River Delta as Shanghai, Changzhou, Suzhou, Yangzhou, Hangzhou and Shaoxing are the key subject of the *Report* in demonstrating the functions of creative industries in promoting regional linked development.

The *Report* consists of three parts. The first part is a general report, The Chinese Creative Industries Become More and More Normative and Ordered, has done an overall analysis on the macro environment, achievements and central issues of the Chinese creative industries in 2011. The second part of the *Report* comprises 16 chapters from Chapter 2 to Chapter 17 and has provided a comprehensive analysis and comparison study of the 15 cities, including Beijing, Hohhot, Tianjin, Harbin, Shanghai, Changzhou, Suzhou, Yangzhou, Hangzhou, Shaoxing, Linyi, Luoyang, Shenzhen, Kunming and Xi'an. Chapter 18 is the third part of the *Report*, which is a review of the new ideas and new perspectives that emerged in the field of creative industries studies in 2011. The integral development of science, technology and culture has become the new horizon of creative industries development, which means to redefine creative industries, cultural industries and creative economy from the perspective of technological development, to seek the fundamental correlations between the two, and to find out the influences of cloud culture, micro

innovation and social network markets on creativity and the market development of creativity and cultural resources.

Chinese Creative Industries Report has taken shape for seven years and has provided research results for over 60 cities, thus has offered abundant research resources in terms of data and literature, which has made a more detailed and characterized research possible and feasible. Therefore, our team is considering taking another attempt, based on *Chinese Creative Industries Report*, to compile another series of reports, *Blue Book of Creative Cities*, as a key component of “creative series” of China Creative Industries Research Center. In 2011, *Beijing Report on Cultural and Creative Industries* and *Qingdao Report on Cultural and Creative Industries* both came off the press and we are anticipating more cities to join in the publishing plan for *Blue Book of Creative Cities* and firmly believe that more cities will become “creative cities”.

For more information, please visit our website <http://www.creativeindustry.org.cn>

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2011年,中国创意产业的发展实现了风格转换,在延续了往年规模增长的基础上,凸显出规范和有序的年度特征。十七届六中全会的召开从战略层面规范了创意产业的发展方向;文化与科技融合的导向则规范了创意产业发展的动力机制;知识产权保护和投融资体系等关键问题得到有序化解;频发的行业热点事件激发了整个产业的规范化进程。

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2011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,产业业态持续创新,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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创意产业作为现代服务业的重要组成部分,是天津应对全球金融危机、全面提升城市综合竞争力的一大亮点。天津市依托“双核双城”的独特城市布局,在政策层面推出科技“小巨人”计划对优秀创意企业进行扶持,同时通过对重点创意产业平台的科技提升,推动了天津文创产业向更高层次发展。同时,原创动漫等新兴业态已经在科技的助推下取得了一定成就,成为天津文创产业的排头兵。

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进入新世纪以来,呼和浩特市在经济社会快速发展的同时,积极发展文化

事业和文化产业,在创新文化体制机制、构筑历史文化名城形象方面做了一些颇有成效的工作,形成了若干具核心竞争能力的文化创意产业园区,打造了一批独具地域和民族特色的文化品牌。同时加强完善公共文化服务体系,不断满足市民的精神文化生活,也扎实推进了首府文化大发展大繁荣。

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近几年,哈尔滨市文化产业保持持续快速发展,新闻出版、广播电视、演艺娱乐等传统文化产业实力不断增强,数字内容和动漫及新媒体等新兴文化业态发展迅速,园区基地的集聚效应逐渐显现。文化产业政策支持力度不断加大,“十二五”时期文化产业发展规划明确了今后五年的目标和重点任务,即把文化产业打造成为哈尔滨国民经济支柱性产业,以此推动文化名城建设。

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2011年,在世博经济的拉动下,上海文化创意产业迅速发展,尤其是工业设计、建筑设计、网络信息业、咨询服务业、广告及会展业,均实现了两位数的增长。今后,上海文化创意产业将深度挖掘海派文化的历史底蕴,在市场和政府的双重推动下,成为“十二五”期间城市“创新驱动、转型发展”总目标的新引擎。

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常州以城市转型升级为契机,以“历史文化名城”建设为抓手,围绕行业、园区、企业三大重点发展文化创意产业,初步形成以动漫网游、创意设计、主题旅游为主要内容的新兴产业。文化创意产业已列为常州重点发展的支柱产业,力争到“十二五”期末,基本形成以创意和内容生产为核心、龙头企业为带动、产业基地为集聚,结构合理、整体协调和持续发展的格局,成为具有国际影响力的文化创意产业基地。

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苏州作为拥有2500多年历史的文化名城,人文资源积淀深厚,近年来,苏州高新技术产业快速发展,文化与科技融合发展的现实条件优良,发展文化创意产业的优势明显。苏州在促进传统文化资源与创意产业结合方面取

得了显著的成效,文化创意产业呈现出蓬勃发展之势,对提升区域竞争力,促进产业结构优化,加强自主创新,实现“苏州制造”向“苏州创造”转型具有深远意义。

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扬州文化产业定位于国家低碳文化产业特色区、江苏省文化产业示范基地,依托2500年的古运河和古城,以建设“创新扬州、精致扬州、幸福扬州”为目标,着力打造“创意城市”,基本形成广陵、维扬和邗江三区联动、科文联姻、园区集聚发展的格局。被注入创意元素的传统玩具、美术工艺等名闻遐迩,浓缩现代科技元素的邗江“智谷”正走向创意文化高地,运河文化创意产业带已成为扬州特色名片。

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2011年,杭州市紧紧围绕打造全国文化创意中心的奋斗目标,深入实施“软实力提升”战略,注重文化与科技等的融合,不断加快文化创意产业集聚发展,培养了一批特色鲜明、竞争力强的品牌园区和龙头企业,使杭州文化创意产业呈现出新的发展态势和兴旺景象。

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绍兴是全国首批命名的24个历史文化名城之一,为开创历史文化名城的新局面,绍兴提出建设历史文化与现代文明融为一体的“产业特色城市、文化休闲城市、生态宜居城市”的目标。绍兴发展文化创意产业突出文化与旅游、工业和科技的融合,不断提升文化软实力,促进文化资源优势向产业优势转化,朝着建设底蕴深厚而又充满活力、可持续发展的文化强市目标前进。

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临沂是历史悠久的古城,文化形态丰富多样;是全国著名的革命老区,红色文化带动产业做大做强;是滨水生态宜居之城,优美环境为文化创意铺垫蓝图。作为山东省唯一的一个“两型社会建设改革试点城市”,临沂抢抓转方式、调结构机遇,大力弘扬沂蒙精神,加快发展文化产业,取得了辉煌成就。

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河洛文化是中华民族的主体文化和根文化,洛阳市立足于传承弘扬河洛文化,围绕建设国际文化旅游名城目标,将历史文化资源优势变为特色产业发展优势,突出项目建设,壮大主导产业,做大产业园区,做强企业集团,打造特色品牌,开拓更大市场,全市文化产业呈现较好发展势头,未来将成为全市经济支柱性产业。

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多年来,深圳文化创意产业发展坚持内容导向与市场需求相结合、坚持科技创新与体制改革相结合、坚持社会效益和经济效益相结合、坚持政府引导和企业主导相结合、坚持立足国内开发与“走出去”相结合的发展思路。2011年新战略的颁布将进一步推动深圳提升文化产品内涵和质量,推进文化与科技融合,推助深圳迈向文化创意产业先锋城市。

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加快发展文化创意产业,实施“文化昆明”发展战略,是提升昆明形象的客观需要,是加快昆明经济发展、促进产业结构优化升级、完善和提升城市功能的重要途径;是提高城市文化竞争力、巩固昆明特色文化产业区建设成果的内在要求。2011年,昆明通过一件件文化大事和文化活动,使其走上了着力打造中国面向西南开放的区域性国际城市、全面推进泛亚文化名城建设的文化创意发展战略之路。

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西安市提出建设“文化强市”的战略目标,把彰显历史文化积淀和优越的自然山水景观结合起来,把独特丰厚的文化资源与优势突出的科技力量结合起来,大力发展西安特色、西安风格、西安气魄的城市文化,让城市更有文化。2011年,西安文化创意产业进入新的发展阶段,文化创意产业全面提升,总量规模进一步扩大,成为推动西安经济发展的重要动力。

第十七章 评析:科技创新驱动城市创意产业大发展 (393)

2011年,我国主要城市的创意产业发展态势良好,产业增长迅猛,创意产业

正在成为越来越多城市的支柱产业。近年来,科技创新逐渐成为各城市创意产业发展的重要驱动要素,科技与文化融合成为创意产业发展的重要方式之一。同时,各大城市仍持续加大对创意产业的政策支持力度,政策的实施对进一步规范 and 扶持创意产业发展起到了重要作用。

第十八章 新视点:科技创新与文化创意新论 (411)

2011年,作为创意双翼的文化与科技融合发展成为创意产业研究的新热点。从融合科技的文化创意产业定义,探讨文化与科技之间的关系,对文化产业、创意产业和创意经济概念的重新审视,到云文化、微创新与社会网络市场对未来创意的影响,文化资源的市场创意开发模式,文化产业的腾飞和思想市场的开拓,无不透露着业内学者对创意产业前沿命题的思考,也为我们在创意社会中前行带来启迪。

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In 2011, Chinese creative industries became more normative and ordered on the base of continuously growing in scale of other years. The Sixth Plenary Session of the 17th CPC Central Committee regulated the developing direction of creative industries on the strategic level; the combination of culture and technology regulated the engine system of creative industries; some critical problems relevant to the intellectual property's protection and the investment and financing have been solved; frequently happened hotspot accidents accumulated the regulating process of the whole industry.

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In 2011, Beijing's creative industries kept on the leading position in the whole country as its priority industries' and leading enterprises' competitive power and international influence continued to be improved. Scientific & technological innovation accelerated the process to the high end of Beijing's creative industries which get new developing power continuously and the industrial status kept innovating and the value added of culture was greatly promoted as well. In the meantime, the more and more powerful cultural consumption stimulates the prosperity of Beijing's creative industries and the quicker international process takes more challenges to it as well.

Chapter III Tianjin: Science & Technology Promoted Cultural & Creative Industries' "Road of Tianjin"	(55)
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As the important part of modern service industry, creative industries become a

bright point of Tianjin to deal with the global financial crisis and promote the city's comprehensive competition. Based on the unique city layout of "double cores and double cities", Tianjin issued "the little giant" plan to support excellent creative enterprises and pushed Tianjin's cultural & creative industries into a higher level by promoting focal cultural & creative industries platforms. In the meantime, the newly emerged animation industry has made some achievements by the help of science & technology and become the exclusive bloc of Tianjin.

Chapter IV Hohhot: the Start Stage of Cultural & Creative Industries (79)

Since the beginning of the new century, Hohhot positively developed cultural cause and industry and made some achievements in innovating cultural systems and constructing a history cultural city. It has built some cultural & creative parks with core competitive power and created a batch of cultural brands with regional and ethical features. In the meantime, it improved the public cultural service system to meet the cultural needs of residents and promoted the city's cultural development and prosperity.

Chapter V Harbin: the Cultural Industry Promoted the Construction of "A Famous Cultural City" (95)

In recent years, the cultural industry of Harbin kept growing fast as traditional cultural industries like journalism and press, broadcast and TV, performing and entertainment grew stronger and stronger, new emerged cultural industrial status like digital contents, animation and new media developed quickly. The policy support to cultural industries was enhanced continuously and the cultural industries developing plan in the "12th Five-Year Plan" definitely pointed out the aim and key tasks in the future five years, which is to turn the cultural industry into a pillar one in Harbin's national economy and then to promote the construction of a famous cultural city.

Chapter VI Shanghai: the Creativity Displays Shanghai Culture's Charming and Promotes the Economic Transition (119)

In 2011, pulling by the World Expo economy, Shanghai's cultural & creative industries developed quickly, esp. industrial design, architectural design, internet information, consultation service, advertisement, conferences and exhibitions were all grew in double-digit. From now on, Shanghai's cultural & creative industries will dig deeply the historic details of Shanghai culture and become a new engine during the "12th Five-Year Plan" by the double pushing of market and government to realize the general goal of "driving by innovation and developing by transition".

Chapter VII Changzhou: to Forge a Creative Industrial Base Which is First-Class in Region and Leading In the Whole Country (141)

Taking the chance of the city's transition and upgrading, the construction of "a historic famous city" as the assistance, Changzhou has tentatively formed a new industry consisting of animation and net games, creative design and thematic tourism focused on trades, parks and enterprises. The cultural & creative industries have been listed as the pillar industry of Changzhou, and will form a rational structure, a harmonious situation and a sustainable layout, and then to become a cultural & creative industrial base with international influence.

Chapter VIII Suzhou: Culture & Creativity make a Modern Suzhou Bifacial Embroidery (167)

As a historic famous city with 2 500 years history and rich humanity resources, Suzhou's high and new technology industry developed quickly, the real condition of developing culture and technology is excellent and the advance of developing cultural & creative industries is quite clear. Suzhou has made achievements on promoting the combination of traditional cultural resources and creative industries, which is quite important to realize the transition from "made in Suzhou" to "created in Suzhou".