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中国

# 创意产业

Chinese Creative Industries Report

## 发展报告 (2018)

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

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## 前 言

2017 年是我国实施“十三五”规划的重要一年,是供给侧结构性改革的深化之年。党的十九大胜利召开,确立了习近平新时代中国特色社会主义思想的历史地位,吹响了决胜全面建成小康社会、夺取新时代中国特色社会主义伟大胜利的号角,制定了适应时代要求、顺应人民意愿的行动纲领和大政方针。大会提出:“中国特色社会主义进入新时代,社会主要矛盾转化为人民日益增长的美好生活需要和不平衡、不充分的发展之间的矛盾。”这一重大判断具有划时代意义,对于党和国家的各项事业发展具有重大而深远的意义。

具体到文化领域,习近平总书记在十九大报告中指出,没有高度的文化自信,没有文化的繁荣兴盛,就没有中华民族伟大复兴。要坚持中国特色社会主义文化发展道路,激发全民族文化创新创造活力,建设社会主义文化强国。中国特色社会主义文化,源自于中华民族五千年文明史所孕育的中华优秀传统文化,熔铸于党领导人民在革命、建设、改革中创造的革命文化和社会主义先进文化,植根于中国特色社会主义伟大实践。发展中国特色社会主义文化,就是要坚持百花齐放、百家争鸣,坚持创造性转化、创新性发展,不断铸就中华文化新辉煌。

传统文化的创造性转化与创意开发,可以生成创新性产品和服务,支撑创意产业发展。文化创意产业能够提供丰富的精神食粮,满足人民过上美好生活的新期待。它以市场手段繁荣文艺创作,推动文化体制改革,不断创新文化产品和服务的生产经营机制,孕育新型文化业态,提升国家文化软实力。传统文化的弘扬,创意产业的发展,从一个侧面表现为我国在 2017 年已有 12 座城市入选联合国教科文组织“创意城市网络”,创意城市数量在全球名列前茅。北京、上海、深圳、苏州、杭州、武汉、长沙、成都、青岛、澳门、景德镇、顺德等城市,包揽了设计之都、美食之都、手工艺与民间艺术之都、电影之都、媒体艺术之都、文学之都、音乐之都等 7 个领域中的 5 个方面,成为对外展示中国文化魅力和文创产业成就的桥头堡,显示了中华文化的自信和魅力日益赢得世界范围的认可和推崇。

基于上述情况,《中国创意产业发展报告 2018》以传统文化与创意城市为主题,重点关注各地在传统文化的产业化开发与创意城市建设方面的最新成就。报告在优先吸纳上述创意城市稿件的基础上,兼顾了西双版纳、西宁和贵阳等潜在创意城市的创意产业发展情况,尤其突出其传统文化的产业化开发。各地报告尽力反映并分析了当地创意产业在 2017 年的发展概况,个别城市限于统计资料及入选蓝皮书的频次,以定性分析历史发展情况为主。但大都涉及了传统文化在当地创意产业发展中的具体开发模式,包括年度热点事件、案例介绍及深度分析。部分城市还介绍了当地在创意城市建设方面的经验。读者可以从中看到多数城市的开发经验总结及未来趋势研判。

《中国创意产业发展报告 2018》沿用了一贯的“总—分—总”结构,突出了点面相结合、描述与分析相结合的传统特色。开篇总报告重在从全局高度反映中国创意产业在 2017 年的发展态势和年度特色,及时关注并深入分析了网络直播、短视频等新兴创意业态;重点关注了《中华人民共和国电影产业促进法》和文旅融合等影响创意产业发展的重大事件和趋势。报告的主体则涵盖了北京、杭州、青岛、武汉、深圳、成都、西安等十六个城市的创意产业最新发展情况。报告最后以评析的方式做出了传统文化开发为创意产业发展和创意城市建设注入新动力的年度判断。

《中国创意产业发展报告 2018》是连续跟踪中国创意产业发展的第 13 本蓝皮书。十三年间白云苍狗,国内外的创意产业发展形势深刻变化,编者也一路艰辛,一路坚持,秉承学术自由之理念,遵循创意研究之宗旨,追寻求索,踏实前行。同时也衷心感谢国内外读者和各地合作者的长期支持。无论将来中国创意产业去向何方,不管编写团队遇到何种困难,希望我们共同坚守这块阵地、一起拓展创意产业研究领域。作为本书城市分册的《创意城市蓝皮书》系列(社会科学文献出版社出版)也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,共同推进创意产业在中国的繁荣发展。

## Foreword

As an important year of China's implementing its 13<sup>th</sup> five – year plan, the year of 2017 has witnessed a further reform of supply – side. The 19th Congress of the Communist Party of China (CPC) has successfully established the historical status of the Xi Jinping's Thought on Socialism with Chinese Characteristics for a New era, while blowing the bugle of finishing the process of a moderately prosperous society in all respects and striving for the great victory of the socialism with Chinese characteristics in the new era by developing the frameworks and guidelines conforming to the requirements of the times and wish of Chinese people. As it noted, the principal contradiction facing Chinese society in the new era is that between unbalanced and inadequate development and the people's ever – growing needs for a better life. This is a significant and epoch – making judgement for the various undertakings of the part and country.

Speaking of the cultural territory, Xi Jinping, the General Secretary of CPC, noted that without full confidence in our culture, without a rich and prosperous culture, the Chinese nation will not be able to rejuvenate itself. We must develop a socialist culture with Chinese characteristics, inspire the cultural creativity of our whole nation, and develop a great socialist culture in China. The socialist culture with Chinese characteristics is derived from China's fine traditional culture, which was born of the Chinese civilization and nurtured over more than 5,000 years; it has grown out of the revolutionary and advanced socialist culture that developed over the course of the Chinese people's revolution, construction, and reform under the Party's leadership; and it is rooted in the great practice of socialism with Chinese characteristics. To develop socialist culture, we should follow the principle of letting a hundred flowers bloom and a hundred schools of thought contend, and

encourage creative transformation and development, so as to add new luster to Chinese culture.

The traditional culture's creative transformation and idea development will generate innovative products and services, supporting the creative industry's growth. Cultural and Creative Industry can provide rich "soul food" that meets the people's demand for a better life. It flourishes literary and artistic creation in a market-oriented way, promotes the reform of cultural system, keeps innovating the ways of producing the cultural products and services, breeds new format of cultural industry and enhances China's soft power of culture. We can see the traditional culture's promotion and creative industry's development by a fact that China has 12 cities chosen into the UNESCO's "Creative Cities Network" in 2017, ranking high by the number. These cities are Beijing, Shanghai, Shenzhen, Suzhou, Hangzhou, Wuhan, Changsha, Chengdu, Qingdao, Macau, Jingdezhen and Shunde. Best known for City of Design, Gastronomy, Crafts & Folk Art, Media Arts, Film, except City of Literature and Music, they are bridgeheads for showcasing of the Chinese culture and achievements of creative industry, proving that the appeal and confidence of Chinese culture are increasingly gaining world-wide recognition and respect.

Based on the above-mentioned facts, *The Chinese Creative Industries Report 2018* focuses on the latest achievement on industrializing the traditional culture and building the creative cities. This report first used the coverage of these 12 cities and gave consideration to the stories of creative industry development from other potential cities, such as Sipsong Panna, Xining and Guiyang, especially focusing on industrialization of traditional culture. Reports from these cities tried to describe and analyze the development of local creative industry in 2017, and a few of them mainly on qualitative analysis of their historical development due to their limited statistics and times of be selected in to the blue paper. But most reports have provided the development mode of traditional culture in the local creative industry, involving hot news of the year, case description and in-depth analysis. Some cities have



also introduced their experience of building creative city. We will read reviews on development and future trend from these cities.

*The Chinese Creative Industries Report 2018* used a typical “deduction and summary” structure, emphasizing on a combination of individual cases and general scenario and that of description and analysis. Its opening part focuses on the trend and characteristics of Chinese creative industry in 2017 from a strategic view point, following and analyzing some emerging business like webcasting and short video, especially discussing some big events and trends that have played a role in creative industry development such as The Film Industry Stimulation Law of P. R. C and the integration of culture and tourism. The main part of report covers the latest development of creative industry in 16 cities, including Beijing, Hangzhou, Qingdao, Wuhan, Shenzhen, Chengdu and Xi'an. By analysis, its last part makes a judgement that the development of traditional culture has offered a push for creative industries and creative cities.

*Chinese Creative Industries Report 2018* is the 13rd blue book of tracking Chinese creative industry. Sea changes happened frequently during these 13 years. Sticking to the idea of academic freedom and our goal on the study, we endured many hardships but forged ahead. We want to genuinely thank our readers and cooperators for their long-term support. However the industry will go and whatever difficulty will stay ahead of our team, we hope we will keep our study in this field and work with them. We also hope the relevant department of the government, universities, research institutions and experts will join us to help write *the Blue Book of Creative Cities*, which will be published as a part book about city of this report, so that we can work along for boosting this industries.

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2017年,中国创意产业整体质量和效益进一步提高,传统文化开发取得新突破,更多创意城市融入全球网络,推动中华优秀传统文化走向世界;基于互联网的新型娱乐影视产业异军突起,政策引导和监管促进市场走向规范;文化与传统产业融合培育经济增长新动能,文化与科技融合形成高新技术主导的创意产业新业态。

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2017年,天津市引导和扩大文化消费,文化创意产业整体实力显著增强,产业体系更加健全,政策环境不断优化。《天津市智能文化创意产业专项行动计划》全面总结了天津市文化创意产业的发展,提出了从2018年至2025年天津市智能文化创意产业发展的十大重点任务。家具、素食等文化领域的产业化发展凸显了天津地方特色。

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发展呈现出提速、升级、融合的良好态势。2017 年获得“电影之都”称号后,青岛不仅勾勒出打造中国影视新高地的新蓝图,还担负起中国电影走上世界舞台中心的国家使命。

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文化是城市的根基和灵魂,成都作为国家首批文化消费试点城市,文化产业飞速发展,居民文化消费需求日益旺盛。作为具有千年历史的文化古都,其传统文化蕴含着整座城市的神韵,挖掘传统文化之精髓进行再创新,激发传统文化的活力,对于城市的文化传承和文化产业发展起着至关重要的作用。

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文化及相关产业营业收入再创新高。未来,贵阳市将整合资源,创建新型文化产业形式,继续致力于大文化助推大扶贫行动,推动贵阳优秀传统文化的创造性转化和创新性发展。

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近年来,西双版纳坚持社会主义先进文化方向,深入开展社会主义核心价值观体系建设,全面推进文化体制改革,文化产业快速发展,文化建设迈上了新台阶。同时,着力探索“文化+旅游+商业”模式的发展路子,将区位优势和富集的自然资源、丰富的民族文化资源转换为产业价值,推进产业集约化、规模化和专业化发展。

## 第十六章 西安:传统文化开发独具特色,创意城市魅力强力显现 ... (315)

创意城市的文化特色和产业定位的实践探索,给西安历史文化遗产保护提供诸多新的启示。处理好城市改造开发和历史文化遗产保护利用的关系,处理好传统文化可持续发展与创意城市建设的关系,在保护中传承、在发展中保护,把文化产业打造成新时期、新时代大西安繁荣发展的支柱性产业,塑造更具活力、更有魅力的城市生态。

## 第十七章 西宁:发展文化创意产业,提升城市幸福指数 ..... (333)

西宁市入选 2017 年中国十大最具幸福感城市,并且排名第二,同年也被评选为全国文明城市。西宁市作为青藏高原最大的城市、兰西城市群建设的重点城市,丝绸之路经济带向西开放的重要节点,多民族多元文化优势明显。挖掘传统文化资源,充分发挥文化产业在构建城市符号、传播城市品牌、塑造城市形象中的作用,成为西宁城市发展的方向。

## 第十八章 评析:传统文化开发为创意产业发展和创意城市建设注入

新动力 ..... (345)

2017 年,中国进入“十三五”规划第二年,中国主要城市创意产业继续保持良好的发展势头,作为创意产业发展的重要基础和源泉,传统文化资源开发起到的作用持续增强,为创意产业发展注入了新动力。创意城市建设成为推动创

意产业发展的重要抓手,12个“创意城市网络”成员取得长足进展,成为对外展示中国文化魅力和文创产业成就的桥头堡。

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# Contents

## **Chapter I General Report: Chinese creative industries forged ahead with cultural confidence in the year of 2017 ..... (1)**

Chinese creative industries saw a further growth in terms of quality and benefits in 2017. The facts that new breakthrough was made in development of traditional culture and more creative cites were integrated into the global network have helped the Chinese culture go global; the new Internet – based entertainment industry grew rapidly and its market became more standardized by policy guide and supervision; the convergence of culture and traditional industries has provided a new momentum for economic growth; the convergence of culture and technology has created a new form of creative industries dominated by high tech.

## **Chapter II Beijing: Promoting the traditional culture through innovative development of cultural creative industries. .... (25)**

Based on its rich resource of traditional culture, Beijing supported its building of the national culture center and scientific and technological innovation center by fully utilizing the city's unique economic, cultural and social value, boosting the deep integration and development of the excellent traditional culture and cultural creative industries, thus further strengthening the pillar status of this industry.

## **Chapter III Tianjin: The Traditional Culture Association bears the burden of building the city's culture ..... (55)**

In 2017, Tianjin managed to expand its cultural consumption, while strengthening remarkably its cultural creative industries, making its industrial system stronger and keep optimizing its policy environment. Comprehensive

sively summing up the development of Tianjin’s cultural creative industries, *The Special Action of Smart Cultural creative industries of Tianjin City* put forward 10 key tasks of Tianjin’s cultural creative industries during 2018 – 2025, highlighting Tianjin’s local characteristics by industrializing some cultural fields, like furniture and vegetarian diet.

**Chapter IV    Shijiazhuang: Promoting the excellent traditional culture by improving industrial converge of creative city. .... (75)**

The city firmly focused on the goal of building modern provincial capital with great economic power; kept improving quality and benefits of economic development; made great effort on bettering its ability of public cultural service; striving to build its cultural brands, such as ancient Zhongshan State, ancient city of Zhengding and stringed instruments, thus shaping a unique historical and cultural logo. It is on the way to develop a new pattern of cultural and creative industries by converging culture, creativity, technology, finance and any other relevant factor.

**Chapter V    Harbin: Stressing on the cultural inheritance and promoting building of the creative city. .... (97)**

Since being recognized as “Music City” in 2010 by the United Nations, Harbin fully took advantage of the role that cultural creative industries played in its economy and society, focusing on the traditional cultural inheritance and distinctive presentation of the city’s culture, solidifying its development orientation of winter resort, music and fashion to enhance it’s cultural power, attractiveness and competitiveness.

**Chapter VI    Changzhou: Cultural IP sparks the ambition of building a creative city. .... (117)**

Depending on its cultural IP’s power on content, transformation and market, Changzhou was trying to build a integrated and multidimensional creative city IP and promoting its popularity and reputation in 2017 by improving its top design, deepening its transformation to build a creative



city, seeking innovative development of its traditional culture and enriching the cultural connotation and social influence of a creative city. The city was extensively using the experience from member of China's "Creative Cities Network", which helped develop itself as a creative city.

**Chapter VII Yangzhou: A synergy of old civilization and modern culture**  
..... (135)

This is a city with rich legacy of culture, blocking printing, lacquerware, paper – cut, Guqin, gardening, knives, embroidery, cutting tools and embroidery...all of these cultural creative products are the city's attractive brands. For Yangzhou, the cultural industry is not only its local touch of economic growth, but also a potential for enhancing its comprehensive power. With its cultural industry giving its old civilization a new glory, Yangzhou is building a famous historical city where the ancient and modern culture are shining each other.

**Chapter VIII Hangzhou: Taking inheritance and innovation as two “engines” for speeding up building of a international cultural creative center** ..... (151)

Focusing on the strategy of “development along the river” with innovation, clustering, opening and convergence as a consistent thread, Hangzhou made an effort to cultivate a new form of industry and growth point by further improving the industry and market of modern culture and dramatically enhancing the size, guiding force, platform clustering capability, driving force, innovation ability and overseas influence of its cultural creative industries in order to provide supports to accelerate building of a international creative center and a unique world – famous city.

**Chapter IX Qingdao: The cultural creative industries helped switch to a new growth momentum; A “City of Film ” is rising** ..... (171)

Focusing on the reform of supply – side and growth momentum switch, taking its competitive industry and the convergence of “culture + X” as two