

程曼丽 主编

Journalism and Communication Review

北大新闻与传播评论

第三辑 Volume III



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PEKING UNIVERSITY PRESS

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卷 首 语

《北大新闻与传播评论》出版至今已三年有余。她植根于北京大学人文精神的沃土,吸收不同学科的知识养分,以开放的心态、国际化的视野关注并“评论”新闻传播领域中的前沿问题。

近年北京论坛^①及其新闻传播分论坛的成功举办,更为《北大新闻与传播评论》提供了丰富的思想、知识和智慧宝藏,使她可以围绕某一论题,集国内外著名学者研究成果之精华,汇成一道道学术盛宴,奉献给读者。

本期刊登的大部分论文,就由2006年北京论坛之新闻传播分论坛提供。此次论坛的主题是“全球传播、媒介与创新产业——对后工业文明的思考”。来自美国、英国、加拿大、澳大利亚、新加坡等国家以及中国大陆和港、台地区的数十位学者会聚在美丽的燕园,就此问题展开了交流与探讨。

本期居首位的话题是“媒体与创意产业”。创意产业在此特指文化产业,而媒体是文化产业的重要组成部分。如同文化产业以“创意”为核心,媒体产业同样需要经过创新增加产品的附加值,以获得更大的市场占有率。对中国媒体的发展来说,这是一个全新的课题。澳大利亚创意产业与创新重点研究中心主任、昆士兰科技大学媒介与传播学教授斯图亚特·坎宁安(Stuart Cunningham)教授就如何提升创意在产业中的地位与作用问题发表了自己的见解。迈克尔·基恩(Michael Keane)教授则从东亚经济发展的历史出发,提出了在传统与现代的融合过程中创意型经济的新模式。

^① 北京论坛创办于2004年,是由北京大学、北京市教委和韩国高等教育财团联合主办的国际性学术论坛,每年举办一次。

在其他栏目中,学者们同样展示了其学术成果的魅力。美国夏威夷大学的丹·兰迪斯(Dan Landis)教授提出一个在全球传播中容易被忽略的问题——全球化对外来移民人口的负面影响,并认为可以运用跨文化培训的方法,减轻这种负面影响;来自中国台湾地区的姚惠忠、郭家齐先生对影响公关公司与客户关系的决定性因素进行了分析、探讨;日本龙谷大学的卓南生教授则对宁波最早的中文报刊《中外新报》的原件及其日本版进行考察分析,其中许多资料为首次发现和披露。

只是择要列数海外、国外学者的研究成果,就足以使人感受到学术思想的烛照,而中国大陆学者的研究成果与之交相辉映,更使本期内容五色纷呈,凸现出“国际化”和“前沿”的特色。

学术交流是学科生存、发展的必要条件,新闻传播学亦是如此。本刊将继续借北京论坛及新闻传播分论坛之势,搭建国际化的学术交流平台,吸纳国内外优秀的研究成果,为促进学科繁荣尽一份心力。

程曼丽

于北大燕园

目 录

卷首语	程曼丽 (1)
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媒体与创意产业

The Creative Economy: from Culture, through Creative Industries, to Innovation	Stuart Cunningham (3)
A New Model of Creative Innovation in Emerging Economies: Rethinking Stages of Development	Michael Keane (18)
休闲消费与媒介功能的调适	童 兵 (36)
略论媒介产业中的文化创意	程曼丽 (46)
影响中国广告业产业模式的要素分析	陈 刚 崔彤彦 (53)

数字化时代的全球传播

Globalization, Migration into Urban Centers, and Cross-cultural Training	Dan Landis (69)
国内视频网站发展现状分析及监管对策研究 徐 泓 方 洁 赵翰露 黄缘缘 庄 明 王晓申 谢 贤 (87)	
中国和平发展中应有的对外传播战略	孙 华 (105)

公共关系理论与实践

- When "Abiding by the Law Costs More": Chinese Top Managers'
View on Crisis Management Liu Xi Chang Zhuo (121)
- 中国公关公司人员与客户关系品质之研究
..... 姚惠忠 郭家齐 (135)
- 论我国在多边外交活动中的国际公共关系策略 陈开和 (155)

媒介文化研究

- 文化的融合与版权贸易的转机 肖东发 周 悦 (173)
- “进步时代”与作为启蒙的大众传播:失去的传统
..... 云国强 吴 靖 (185)

新媒介与公民社会

- 公共空间私有化与私人空间个人化:手机在城市空间关系
重构中的角色 李 理 杨伯淑 (207)
- 互联网与公民社会研究中的若干理论与方法问题 杨国斌 (223)
- 网络媒介事件与中国公民性的建构 师曾志 杨伯淑 (235)

新闻史研究

- 《中外新报》(1854—1861)原件及其日本版之考究
..... [新]卓南生 (259)
- 论 1949 年以来我国新闻报道叙述风格的演变 王辰瑶 (292)
- 《良友》图像视阈中的时装流行体系与现代性消费意识演变
..... 吴果中 (310)

媒体与 创意产业

- ▶ The Creative Economy: from Culture, through Creative Industries, to Innovation
- ▶ A New Model of Creative Innovation in Emerging Economies: Rethinking Stages of Development
- ▶ 休闲消费与媒介功能的调适
——兼议后工业社会创意产业的发展动力
- ▶ 略论媒介产业中的文化创意
- ▶ 影响中国广告业产业模式的要素分析
——试析媒介购买公司对中国广告业的影响

The Creative Economy : from Culture, through Creative Industries, to Innovation

Stuart Cunningham

Abstract: This paper presents a new approach to understanding what constitutes a “creative” economy. The creative economy is a difficult category to grasp. But it is bigger and broader than we think, and is much more than culture and the arts. This is because it joins a broader range of industry sectors together than those which have traditionally been classified as cultural, giving birth to the notion of the so-called creative industries. But it goes further than a sectoral focus to embrace how creative roles or occupations are being found more and more throughout the economy. Tracking this is necessary but insufficient, however, if we are to capture what is actually going on to cause longer-term changes in our economy—for that we need a better understanding of innovation and policies suited to promoting innovation across the economy, not just in sectors that depend on laboratory science.

Key Words: creative economy; cultural economy; innovation

The notion of the “creative industries” has gained purchase in contemporary policy and industry debate in both OECD countries and several others, across the east and west. It is seeking to reshape relations between

old and new media and the cultural sector and place media, communications and culture as a driver, rather than a backseat passenger, in the knowledge economy. It is beginning to connect the sector to the innovation agenda and thus move it into the sphere of research-based, high value-added, knowledge-intensive industry policy (see Cunningham 2005, Cunningham et al 2005).

Second, it brings together in a provisional convergence a range of sectors which have not typically been linked with each other and thus it has expanded greatly the domain of what is typically counted, throwing settled categories (arts, media, culture, cultural industries) into more dynamic process. To give an admittedly extreme example, John Howkins (2001: 85) defines the creative economy as simply “financial transactions in creative products”, whose economic value is secured through copyright, design, trademark and patents, and therefore includes the science, engineering and technology (SET) sectors along with the arts, media, new media, design and architecture.

Third, the sectors within creative industries—the established arts (visual and performing arts, dance, theatre, etc.); the established media (broadcasting, film, TV, radio, music); the large design and architecture sectors, and new media (software, games, e-commerce and mobile content)—move from the resolutely non-commercial to the high-tech and commercial. This continuum also moves from the culturally and often locationally specific to the globalized and generically creative, throwing open the door to the question of how creative inputs drive wider industry sectors, and how sectors with very different business models, revenue sources, demand drivers and scale and purpose, can co-exist productively in more than a policy maker's dream.

There is certainly important work to be done on capturing with greater comprehensiveness the exact dimension of the creative industries “themselves”. But we need also to move to understanding creative outputs (culture) to creative inputs into the wider economy because much of the real

growth dynamism and what differentiates the creative industries from the creative economy, is the move from sector-specific arguments to creative skill sets as occupational inputs into the broader economy, and creative outputs as intermediate inputs into other sectors. Thus it is to track the “creativity as enabler” idea, comparing it to the ICT-as-enabler debates of the past decades.

The majority of creative industries mapping studies have naturally been focused on the sector-specific activities and therefore gathered data about the specialist firms operating within each part of the industry. But measuring the “creative” impact on the economy needs to encompass both creative industries activity and the impact of creative occupations. There is substantial and frequent movement between these modes of activity with individuals moving from sole practice as say film producers to working for government film agencies and for sole practitioner designers who sign a three-year contract to work for a bank or advertising agency.

The direct economic impact of creative industries has been significantly under-estimated. For example, our analysis has shown that, because so many designers are embedded in other industries and because design is defined and counted in such an unhelpful way, the design sector is under-counted by some 36%.

The sector has a 34% higher mean income than for the Queensland economy as a whole, which at least suggests a different profile for creatives than the more widespread understanding of a low-wage, subsidised sector. In the Queensland study, we find that exports and gross value added are higher than average sectorally, that creative industries tend to be more knowledge-intensive in that they spend more on knowledge-based workers as a percentage of their total wages spent than other sectors.

These are suggestive rather than definitive findings, but they provide pointers in the direction of the movement from a sector-specific to an economy-wide focus. Just as the ICT sector benefited from the input-value it was shown to afford the economy as a whole, so the data suggests that a similar

value can be seen with creative inputs.

Cultural Economics

The established economic approaches to culture and the arts may have been thrown a curve ball by the notions of creative industries and economy. However, creative industries theory, analysis and policy have a way to go before they establish a robust economic framework that realistically and compellingly captures the value of the creative sector and thereby might provide fresh rationale for public support for the sector. It must first dialogue with cultural economics, that established sub-branch of neo-classical economics, and with the economic thinking that underlies the concept of the “cultural industries”.

Cultural economics analyses largely settled industry sectors and focuses on microeconomic analysis of choice in established markets. It concentrates on the exceptionalism of these markets or quasi-markets which is held to be due to the unusual nature of choice and decision making by both suppliers and purchasers in these markets. It has focused on idiosyncracies which mark this exceptionalism—for example, Baumol’s theorem that the “productivity” of a string quartet is fixed and cannot change, over decades and even centuries. It will always require the same number of performers and the same time to perform. (If we look at this from the consumption not the production side, we can see that the vastly increased range of digital mastering and distribution options have rendered Baumol obsolete.) The traditional approach to the arts and culture uses a static microeconomic argument for allocative efficiency in the face of these “exceptional” economic activities which exhibit systemic market failure.

Cultural economics has typically focused on the arts end of the creative industries continuum, often because these arguments and assumptions work best at that end. In *Economics and Culture*, David Throsby, one of the foremost exponents of cultural economics, builds in a working assumption

that “the creative arts as traditionally defined” are the core sectors in a cultural industry model because they are the “locus of origin of creative ideas” (2001: 112). He argues (2006: 39) that a flourishing arts sector is “one of the most enduring foundations” on which to build the cultural industries.

This model, often seen and adopted in various forms, conflates static and dynamic models of economic analysis in that it assumes that because some sectors have more creatives as a proportion of the whole workforce in that sector they must be the “locus of origin of creative ideas”. Also built into the model is a dubious assumption that the more that sectors produce both cultural and non-cultural goods and services (the large industrialised creative industries), the less “core” they are. Given the capacity for “creative ideas” to diffuse further when they are embedded into other outputs, and given the recurring data that shows that creatives are found embedded in wider industry sectors than in specialist sectors, I would have thought the opposite was a more interesting hypothesis. The sources of novelty and change, which is to say of innovation, propelled by creatives will be found across the creative industries and increasingly across the wider economy. The “enduring foundation” lies more in the creative qualifications and occupations—that is, the creative human capital—than in particular output/industry sectors. This suggests a human capital model, not a sectoral exceptionalism model, for the importance of a creative class.

Emerging Dynamics of Creative Culture

Looking ahead, what are some of the key emergent cultural practices in the 21st century? Consumption drives postindustrial economies more and more, and much of it is “prosumption”, engaged in by “producers”, and what is being “prosumed” is user-generated content. There is huge growth in peer-to-peer activity and a more “participatory” culture.

We all know some of the developments in this space; there is more user-generated content on the Internet than professionally-produced and cor-

porate content. User-led innovations, such as SMS, have changed the business model for mobile devices, one of the most dynamic growth sectors of the economy, leading to successful MMS (picture cameras) uptake and heavy R&D and investment in mobile content which has led to expanding opportunities for creatives.

Of course, with the scholar's penchant for novelty and the Next Big Thing, you can get carried away with user-led innovation. When Rupert Murdoch starts talking about digital "natives" and "immigrants" and acknowledges that News Corp has underestimated the impact of Internet-based news sourcing and the social logic or "collective intelligence" (not to say the impact on the bottom line) of peer-to-peer communication in his 2005 address to the American Society of Newspaper Editors, then, as Eric Beecher (2005:67) recently surmised, "something seismic is going on. Seismic, but unpredictable." Reputedly, Murdoch was scared into this position by data such as that presented by the Carnegie Foundation that showed how "new forms of newsgathering and distribution, grassroots or citizen journalism and blogging sites are changing the very nature of who produces news" and that the 18-34 demographic is following and creating this inexorable momentum.

Why exactly are the dimensions of this new take on culture? First, it disrupts the linear value chain of professional modes of production. Second, the innovations are as much, and intrinsically, about distributional breakthroughs as they are about new production modes. The culture that is emerging is as much about creativity invested in the distribution and aggregation possibilities and potential afforded by new communication platforms (that is, about the "social logic" and "collective intelligence" of p2p) as about text and content. I'm almost tempted to say the medium is the message.

One way to take in this emergent paradigm shift is to consider the tenets of Richard Caves' (2000: 2ff) admirable summary of the "Basic Eco-

conomic Properties of Creative Activities” that constitute the mainstream arts and media today:

“Nobody knows”—demand is uncertain. There is more radical uncertainty about the likely demand for creative product, due to the fact that creative products are “experience goods”, where buyers lack information prior to consumption, and where the satisfaction derived is largely subjective and intangible.

“Art for arts sake”—creative workers care about their product. Creative producers derive substantial non-economic forms of satisfaction from their work. This makes them vulnerable to exploitation and to supply almost always outstripping demand, thus fundamentally distorting market equilibrium.

“Motley crew”—some products require diverse skills. Creative production is mostly collective in nature, thus the need to develop and maintain creative teams that have diverse skills, and who often also possess diverse interests and expectations about the final product.

“Infinite variety”—differentiated products. There is a huge variety of creative products available, both within particular formats (for example, videos at a rental store), and between formats. Each creative output is to a greater or lesser extent a prototype of itself, and thus as much or more effort has to go into marketing as production if it stands a chance for success.

“A list/B list”—vertically differentiated skills. All creative sectors display great difference between the bright stars and the long tail and this plays out in remuneration and recognition, and the ways in which producers or other content aggregators rank and assess creative personnel.

“Time flies”—time is of the essence. Most industrial forms of creative production need to coordinate diverse creative activities within short time frames.

“Ars longa”—durable products and durable rents. Many cultural products have great durability, the capacity of their producers to continue to extract economic rents (for example, copyright payments) long after the