



大智慧学术文丛
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谢蓬勃 著



中国报业 市场运行机制研究

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序

任 辛

多年来,“报业市场运行机制”一直是报业人士十分关注的一个问题。中国报业在经过20世纪90年代以来的加速市场化进程之后,当前已进入到了一个相对“停滞期”。报业不仅面临着来自新媒体尤其是网络媒体的挑战,而且报纸产业自身也存在着运行体制障碍、市场结构失衡、盈利模式单一等诸多“危机”。在这样的情况下,深入探讨报业市场运行机制的问题,既有很强的理论意义,又有很强的实践意义。

本书以中国报业市场运行机制为研究主线,从产业经济学的角度,运用市场经济理论、产业组织理论和规制经济学理论,从报纸的二重性特征入手,探讨了中国报业引入市场运行机制的内在动因;从供求机制、价格机制、竞争机制等方面探讨并提出了构建中国报业运行机制体系的框架;同时,在分析国外报业市场运行状况的基础上,阐述了中国报业的产业政策,对市场经济条件下政府如何规范报业的运行,提供了具有理论指导性的建议。

阅读本书,我感到有三个亮点。第一,本书在对报业属性进行分析时,进一步拓展了报业具有多方面的二重性特征,揭示出报业区别于其他产业的特殊性,而正是由于这些特殊性,才导致了报业运行与其他产业的不同。比如,

报业二重性中的公共品属性，决定了报业的运行需要政府介入；而其私人品属性决定了报业的运行需要市场介入。但政府介入会出现无效率，市场介入也会失灵，任何单一的运行都会出现不足，关键在于怎样“介入”。政府的介入，包括政府供给和政府政策，现在更多的是产业政策；而市场的介入，更多的是引入市场运行机制，以提高资源配置的有效性。第二，运用市场机制理论分析报业运行机制，在以往的相关研究中显得不足，本书在这方面有了明显加强，应当看作是对以往研究成果“缺陷”的一种“弥补”，具有重要的理论价值。第三，对于如何构建报业市场运行机制的框架，本书不是孤立的、分散的而是系统的、有机的从供求机制、价格机制、竞争机制等方面加以分析，展开论述。相信读过本书的报业和新闻界人士，都会从中得到不少启发和新的思路。

本书的选题，涉及经济学和新闻学等学科领域，这种交叉问题的研究，一方面拓展了产业经济学的研究领域，另一方面也拓宽了报业产业的研究视野，可见其难度之大。谢蓬勃同志在报业工作了11年，了解报业的具体运作，有着较为丰富的实践经验和从业经历；在攻读产业经济学博士期间，又得到了名师的指导和严格的学术训练。因此，把理论与实践紧密结合起来，以经济学的眼光审视报业的运行，其研究成果无疑有着扎实的基础，研究价值是值得肯定的，也是研究报业发展的又一佳作。就他本人而言，是勤奋努力、刻苦钻研的结果，我向他表示祝贺。

是为序。

（作者为江西日报社副社长、副总编辑、高级编辑）

前 言

在传统的计划经济条件下，中国报社的定性是非常单一和明确的，即为党和政府部门的附属机构，是行政性事业单位，直接隶属于党政机关建制系列。报社的产品——报纸是完全的政治宣传品，绝大多数报纸都是各级党政机关的机关报，根本没有形成一个经济学意义上的产业。虽然政治属性在当时的报纸中占有绝对的统治地位，然而报业自身却潜存着一些不可忽视的经济因素：报纸仍然有一定意义上的发行市场，除了订购也存在一些小规模的零售市场；报纸也是具有价格的；购买纸张，印刷、发行等市场过程当中的一些环节，仍然要实行一定程度的经济核算。也就是说在计划经济条件下的报纸虽然被视为纯粹政治宣传品，被视为没有商品性质的新闻纸，但是其中是含有商品因素的。只不过这个因素是不被人们认可，是潜在的。

自改革开放以来，尤其是实行经济体制改革以来，中国报业发生了显著的变化。首先报纸的数量出现大幅度增长，报纸的种类大大增多，由此报纸市场急剧扩大。其次，报纸市场的扩大、报纸生产资料供应的市场化，为报纸供应量的大幅度增长提供了条件。而伴随中国的经济、政治、文化、社会的改革发展，社会结构调整，社会流动加速，社会分层出现，人们对报纸的需求迅速增长。这一切为报

纸的发展提供了基础和条件，自然而然地促进了报纸走向市场化：第一，报纸一多，发行竞争激烈，为抢占市场，报纸发行选择市场化之路，从而打破了长期以来报纸邮政发行一统天下的局面，自办发行逐步上升。第二，报纸发行的市场化和激烈的竞争，促使报纸的性质迅速从单纯的政治宣传品向商品转变，商品经营的各种特征都在报业发展中爆发出来，直接促进了各报社经营管理方式的企业化。报纸的商品化和报社的企业化经营意味着：报社逐步从政府附属机构转变为商品生产者，逐步走向独立经营的市场主体地位。第三，为适应报业发展的新形势，党和政府对报纸的管理方式也开始发生变化，由原来的管理者和经营者转变为要求报纸和报社减弱以至于摆脱对党政机关的行政性依附，减少直至取消对报纸生产和发行过程的行政性干预。而且要求绝大多数报纸和报社都要在经济上实行自负盈亏、自我发展。这一系列深刻的变化过程，促使中国报业的市场主体开始成长起来，中国报业走向市场已为必然之势。改革开放 20 多年以来，中国报业的发展出现明显的市场化、商品化、企业化，从而推动了中国报业的产业化。

在中国报业实行了产业化之后，越来越多的报业在经营领域广泛采用商业化手段，使得行政性手段逐步减少；越来越多的报社具有了盈利能力和自我发展能力，成为独立经营的经济实体；市场机制在报业资源配置中的作用越来越大。这一系列的变化加上中国市场经济体制的逐步完善，特别是经济全球化的加速，在传统计划经济体制下的报业运行模式，已经不能适应报业产业发展的要求，因此，改革报业传统运行机制，建立适应市场经济的报业运行机

制已经势在必行。这主要体现在两个方面：一方面，从理论上讲是由报纸的二重性所决定的。报纸的公共品属性决定报业运行需要政府制度安排；报纸的私人品属性决定报业运行需要市场来供给。另一方面，从实践上看表现在三个方面：一是中国市场经济发展的需要；二是报业自身发展的要求；三是应对全球化竞争的需要。

由于报纸具有二重性，同一般商品是完全意义上的单一经济属性不同，报纸具有自己的特殊性和复杂性，由此导致它的运行与其他的行业有所不同。报纸的分类也有很多标准，按照不同的标准有不同的类别，如按照办报主体的级别分类，分为全国性报纸、省级报纸、地市级报纸和县级报纸；按照报纸的性质分类，分为机关报、行业报、企业报等。1991年有关部门为了便于对报业的管理，根据报纸的主办单位和刊登的主要内容，把当时国内的报纸分为9类：机关报、社会团体团体报、行业和专业报、生活服务类报、企业报、综合类报、晚报、文摘报、军队报。本文为了论述的需要，把报纸分为两大类别：机关报和非机关报，这样区分的目的是为了在本文的分析中方便和需要。由于报业带有意识形态的属性，加上其竞争的有限性，因此报业的运行机制与完全竞争市场的运行机制显然有所差异。但是这并不意味着在确定报业运行机制时，就可以完全放弃市场运行机制的优势，事实上，随着报业市场化程度地不断提高，报业市场主体地位的不断完善，报业性质的转变，报业产业化的渐进，市场供求机制、竞争机制和价格机制在报业领域发挥越来越重要的作用。本书从报业所具有的公共品和私人品的属性出发，阐述了报业的运行既需要政府介入，也需要引进市场。这是从报业二重性

的角度来阐述报业引入市场运行机制的必要性。这是本书讨论的第一个内容。

今天的中国报业已在快速发展,成为国民经济发展的—大亮点,而且传媒产业已经成为中国经济的支柱产业,报业的经济属性得到极大张扬。然而由于许多原因,报业的发展仍然与整个国民经济的发展要求还相差甚远,体制机制的改革仍然没有与市场经济发展同步,也落后于国有企业的改制步伐。报业产业经常处于计划经济与市场经济不断博弈之中,报业作为特殊产业在运用市场运行机制上还往往显得经验不足。与国际报业巨头相比,差距仍然非常之大。因此,报业的发展潜力没有完全开发出来。那么在市场经济条件下,如何构建适合报业发展的运行机制?本书从供求机制、价格机制和竞争机制三个方面来构建报业的运行机制。这是本书讨论的第二个内容。

报业的发展不仅需要市场,同样需要政府的产业政策,这里从市场运行失灵的角度,说明报业的运行需要政府产业政策的必要性。因此根据报业的特殊属性,制定相应的产业政策不仅是产业经济学理论的需要,也是报业实践发展的需要。这是本书讨论的第三个内容。

围绕三大块内容的架构,本书的主要研究工作如下:

—、阐述了本书要研究的问题、背景、意义、现状、方法、思路和不足。特别是研究现状在借鉴前人研究的基础上,作了系统的、总结性的分析。在此基础上找出报业研究中存在的不足,从而为本书研究提供了基础并由此寻找到新的出发点和新的研究视角——从供求、价格、竞争来系统分析报业的市场运行机制。

二、阐述报纸的定义、产品属性、市场结构、基本情

况，解析报业的二重性特征，这是报业的特殊之处，也是区别于其他产业的不同之处。这是分析报业的前提，也是分析报业的关键，因而成为本书分析报业的一根红线并且贯穿全书的始终。

三、从理论分析和实践需要两个方面，来阐述报业引进市场运行机制的必要性。理论上主要是从报业的二重性视角出发来分析的，推出中国报业为什么要引进市场运行机制。并且从实践的三个方面也作了证实。

四、分析了西方报业运行机制，以美国两家报纸为案例，分析西方（主要是美国）的报业运行机制的经验和启示，为中国报业运行提供一些借鉴和启发。

五、系统构建报业市场运行的三大机制。

报业引入市场运行机制的第一个重要方面就是建立与报业市场相适应的供求机制。从报业供求现状出发，分析供求特点、存在问题，寻求建立合适的供求关系。

报业引入市场运行机制的第二个重要方面就是建立报纸价格形成机制。从报纸产品价格的二重性着手，分析报纸产品和报纸广告定价方式、特点和运行效应，由此构建合理的报纸价格形成机制。

报业引入市场运行机制的第三个重要方面就是如何建立适合报纸产业特征的竞争机制。本文阐述了中国报业市场竞争形态，分析了报业市场竞争存在的不足和中国报业市场应采取的竞争形式。由于报业的特殊性，不可能像其他产业展开全面竞争，而应是差异化竞争、有限竞争、适度竞争。

六、市场机制虽是报业运行的重要机制，然而市场并不是万能的，也不是自动运转的，其显著的不足就是市场

失灵，所以用政府制度安排来补充和纠正是非常必要的。因此，报业的发展不仅需要市场运行机制，也需要政府的产业政策。而且研究产业经济学，探讨政府产业政策当然是其中非常重要的一个组成部分，研究报业产业也同样如此。本文从报业产业政策制定的理论基础、实践需要、报业产业政策存在的问题到促进报业发展的产业政策几个方面作了详细阐述。

七、报业市场的产业组织分析：用产业组织理论分析报业产业组织，论述报业的市场结构、行为和绩效。

八、总结全篇，归纳出全书的创新点和研究的不足。

Abstract

A Research on the Market Operating Mechanism of Newspaper Industry in China Under the traditional planned economy, newspaper offices in China are the party and government department's affiliated organization, and are the administrative institution subordinated directly in the party and government organizations organic series. Newspaper offices' product——newspapers are absolutely the propaganda materials. Most of them are official newspapers of all levels of party and government departments, so there isn't a newspaper industry from the economic view. Even with the overwhelmingly political attribute, newspaper industry has some potential economic factors which cannot be ignored. Firstly, newspapers still have release market in certain extent, and have some small retail market except subscription. Secondly, newspapers have price. Finally, purchasing paper, printing, releasing and some other processes in the newspaper market, still have to implement certain degree of economic accounting. In other words, although newspapers are regarded as the pure political propaganda materials and newsprinting paper which does not have the commodity nature under planned economy, they are actually include the commodity factor.

Since the implementation of reform and open policy, especially the implementation of the economic system reform, the Chinese newspaper has had the remarkable change. Firstly, there has been a great increase in the newspaper quantity and the type, which has made the newspaper market dramatically expand. Secondly, the expansion of the newspaper market and the marketable supply of newspaper producer goods have contributed to the large growth of newspaper supply. Meanwhile, with development of our country's reform in economy, politics, culture and society, the social

structure adjustment, the social mobility acceleration and the social lamination appearance, the demand of newspaper rapidly grow. All these have provided the foundation and the condition for the newspaper development, which promoted the newspaper to move towards the marketability naturally. At first, the release competition is intense with more and more newspapers. In order to occupy the market, the newspaper release becomes marketization and self-release rises gradually, which has broken the condition that the newspaper release has been monopolized by postal service since long ago. Furthermore, the newspaper release marketability and the intense competition urge the nature of newspaper transform rapidly from the pure political propaganda material to the commodity. Each kind of characteristic of commodity management all erupts in the newspaper industry, which directly promotes each newspaper offices' management and operation way commercialized. The newspapers' commercialization and newspaper offices' enterpriselizational management mean that the newspaper offices transform gradually from the government affiliated organization into the commodity producer. Finally, the party and the government all start to change the management way to newspapers in order to adapt the new situation in newspaper industry development. Newspapers and the newspaper offices are requested to weaken or get rid of the party and government organizations' administrative attachment. They are also requested to reduce or even cancel the administrative intervention in the newspaper production and release process. Moreover, most of the newspapers and the newspaper offices are needed to assume responsibility for own profits and losses and self-development. A series of deep transformations urge the market main body of the Chinese newspaper industry start to grow. Since the implementation of reform and open policy for more than 20 years, Chinese newspaper industry development has appeared obvious tendency of marketization, commercialization, and enterpriselization, thus impelled Chinese

newspaper industry industrialized.

With today's social reforming, more and more newspaper offices widely use the commercialization method in their management and reduce the administrative method gradually. More and more newspaper offices have the profit ability and self - development ability, and they become the independent economic entity. The market mechanism takes more and more important part in newspaper industry's resources allocation function. Along with our country's market economy system gradually perfection, especially the economical globalization acceleration, newspaper industry movement pattern under the tradition planned economy system could not adapt the newspaper industry's development request. Therefore, it is imperative to reform the traditional newspaper industry's operational mechanism and establish newspaper industry operational mechanism which adapts the market economy. This mainly manifests in three aspects. First, it is the request of developing our country's market economy. Second, it is the inevitable request of the newspaper industry's own development. Third, it is the need to adapt the globalization competition.

Because the newspaper industry has the dual attributes, namely the ideology attribute and the commodity attribute (industrial attribute) . Being different with the general commodity's attribute, newspaper has an ideology characteristic. The newspapers' classification is also very complex. According to different standards, there are different categories. For example, according to rank classification of the main body who publishes a newspaper, it can be divided into the nationwide newspaper, the provincial level newspaper, the prefecture level newspaper and the county level newspaper; according to the nature classification, it can be divided into the official newspaper, the profession newspaper, and the enterprise newspaper and so on. In 1991, departments concerned who wanted to manage the newspaper industry conveniently, divided the domestic newspaper at

that time into 9 kinds according to the newspapers' sponsor unit and the publication primary coverage. Those are the official newspaper, the society grassroots organization newspaper, the profession and the specialized newspaper, the life service class newspaper, the enterprise report, the synthesis class newspaper, the evening newspaper, the digest newspaper and the army newspaper. In order to elaborate clearly and provide the convenience in the later analysis, we divide the newspaper into two big categories: the official newspaper and the non - official newspaper. Because the newspaper industry has the ideology attribute and the monopolization attribute, operational mechanisms between the newspaper industry and the perfect competitive market have an obvious difference. But this does not mean the government may give up the advantages of market mechanisms completely when they determine the newspaper industry's movement policy. In fact, because of the continuously enhancement of the newspaper industry's commercialization degree, the unceasing consummation of the newspaper industry's market main body status, the newspaper industry's transforming nature, and the newspaper industry's industrial production progress, the market supply and demand mechanism, the competitive system and the price mechanism play more and more vital role in this industry, thus, the introduction of the market mechanisms become inevitable. This is one of the article research.

Today Chinese newspaper industry has been developing fast, and becomes a big luminescent spot in the national economy development. The media industry becomes the pillar industry and the newspaper industry's economical attribute becomes enormously obvious. However as a result of many reasons, the newspaper industry's development speed still fall behind the entire national economy's development speed, and the mechanism reform still fall behind the state - owned enterprise's remanufacture step, not synchronized with market economy development. The newspaper industry is

always in the game between the planned economy and the market economy. As a special industry, it is insufficiently experienced in utilizing the market mechanisms. Compared with the international newspaper industry giant, the disparity is extremely big. Simultaneously the newspaper industry's development potential has not completely explored, so it is timely and essential to carry out the culture organizational reform at present, demonstrating the government's determination and the newspaper industry's development direction. All these can explain the extreme necessity of researching the newspaper industry, especially when our country's development is at the social reforming stage, the theory support and the instruction are urgently needed to further the newspaper industry research. Having worked in the news front for ten years, I have the advantage of being in a favored position in the research, and I know it is also my responsibility. Moreover, after three years study in industrial economics in Jiangxi Finance and Economics University, I also have the natural and rare condition to research the newspaper industry with the industrial economic theory. Therefore, I chose the market mechanisms theory and the industrial organization theory to discuss the newspaper industry's operational mechanism, thus has formed this paper. At market economic, how establish newspaper industry three market mechanisms. This is the second question of the article research.

The development of newspaper industry needs not only the market, but also the government's industrial policy. Thus, according to speciality of newspaper industry, establishing relevant industrial policy is not only the theory of industry economics needs, but also the practice of newspaper industry demands.

The main research work is as follows:

In this paper, I firstly introduce the questions needed to study, the background, the significance, the present situation, methods and the inno-

vation spot. Specially, I summarize the present situation of the newspaper industry study, which is not only an induction and synthesis to the predecessor's study, but also an analysis of the insufficiency in this research. All of these provide the foundation and a new starting point and research angle of view for this article.

Then, I explain the definition, the production process as well as the development course of newspaper; analyze the nature of the newspaper industry and the characteristic of newspaper industry differentiated with other industries; emphasize the newspaper industry's particularity, the duality which is the premise and the key to analyze the newspaper industry, and thus becomes a line throughout the analysis newspaper industry.

I also analyze the western newspapers industry to provide the frame of reference for our country's newspaper industry. Regarding two American newspapers as the case, I use the comparison method and the case to summarize the operational mechanism experience and the enlightenment of western newspaper industry (mainly in US) .

Establish newspaper industry three market machenisms: The first important aspect of introducing the market mechanism into the newspaper industry is how to establish a competitive system which may fit the newspaper industry characteristic. At first, I make a comprehensive and thorough analysis in the market mechanism principle and the necessity of the introduction of the market mechanism to our country's newspaper industry, thus provide a theory support for the analysis of newspaper industry operational mechanism. In this article, I elaborated the competition pattern evolution process in Chinese newspaper industry's market and the basic content of the newspaper industry's market competition. I also analyze competition shape and form of the newspaper industry market. Because of the particularity of Chinese newspaper industry, it is impossible to launch the comprehensive competition like other industries, but only can be the limited