了化蓝皮书 LUE BOOK OF CHINA'S CULTURE

# 中国文化产业发展报告

 $(2012\sim2013)$ 

ANNUAL REPORT ON DEVELOPMENT OF CHINA'S

**CULTURAL INDUSTRIES (2012-2013)** 

主 编/张晓明 王家新 章建刚





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# 《中国文化产业发展报告(2012~2013)》 撰稿人名单

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《中国文化产业发展报告(2012~2013)》是第十一本中国文化产业发展报告,由中国社会科学院文化研究中心编写。

本书采用了第一本文化蓝皮书(2002年出版)的跨年度分析模式,力图展示一个新的开端。从2013年开始,每年文化产业蓝皮书将定期于10月以后出版,力求更贴近我国文化产业相关新数据发布的时点,更加准确地评估当年形势,预测来年的发展。

由总课题组撰写的"总报告"展示了本书的核心观点。本书认为,2011年以来,我国文化产业发展呈现出的显著特点有:主要门类增长迅速,规模扩大;数字内容产业发展迅猛,数字出版继续保持强劲增长态势;国有文化企业和国有控股文化类公司表现良好;文化产品进出口增加,视觉艺术品出口增速最快;文化体制改革全面提速,限期完成;政府支持力度进一步加大,配套政策纷纷出台。

本书指出,十八大的召开将开启我国文化产业的新发展周期,我国的文化产业已经进入拐点,出现了四个方面的重大变化:一是文化市场已经从总体"短缺"转向"短缺"与"过剩"并存,将迎来大规模洗牌和兼并重组浪潮;二是文化产业已经从"分业发展",走向了融合发展,文化产业内各个行业主管部门主导的发展,将越来越为跨行业的融合发展取代,甚至为文化经济普遍融合发展所取代;三是文化产业将从区域性竞争发展走向统一市场条件下的整体协调可持续发展,地方政府本位的发展模式将为国家层面的、由综合经济管理部门主导的发展模式所取代;四是文化管理体制将从行政性的"行业分层管理"走向面向市场的综合性大部制管理,部门合并已成必然。

本书建议在以下几个方面加强研究:为应对短缺与过剩并存的新形势,研究相应对策;应对建立统一市场和实行融合发展的转型要求,合并原有分业管理的体制,尽快组建综合文化管理机构;面对上一轮发展的"政策红利期"即将结束的局面,以深化改革开启新的"制度红利期",提供新的发展动力。

#### **Abstract**

Blue Book of China's Culture: Annual Report on Development of China's Cultural Industry (2012 – 2013) is the eleventh annual report on the development of China's cultural industries. It is produced by the Research Center of Humanities of CASS.

This book continues the cross-year analysis mode that was adopted in the first Blue Book of China's Culture published in 2002, but it try to show a new look to the readers. From 2013, Blue Book of China's Culture will regularly be published in October. At that time the country would have published a new statistic date of China's cultural industries in the past year, so the book could provide some quick analysis on the situation of China's cultural industries in the past year and give prediction for the development trend in the coming year.

As in the past the General Report prepared by its special group constitutes the leading and core part of this book. It sums up some new features shown in the recent development of China's Cultural Industries following: the main cultural industries developed quickly and their scales were further enlarged; the digital content industry moved up rapidly and the digital publishing industry continued to maintain its strong growth; the state – owned and the state-holding cultural companies ran well in the whole; the export and import of cultural products kept increasing moderately and the highest growth rate among which gained by visual products export; the reform of cultural system was sped up overall and it was requested to be accomplished within the deadline; the government gave more support to the development of China's cultural industries and more related policies were come out.

According to this book, the eighteenth National Congress of the CPC will start the new development stage of cultural industries. The turning point has appeared for the cultural industries in China in at least four aspects: firstly, the situation of cultural market has undergoing the change from pure "shortage" to the coexistence of "shortage" and "superfluous". This will surely lead to the next round large-scale industries merging and reorganization; secondly, along with the change that the

separate development mode of cultural industries is being replaced by an integrate development mode, the separate management mode of the government will also be replaced by a cross-industry management mode; thirdly, in view of the fact that a united market is the most important precondition for the overall coordinated and sustainable development of the cultural industries, the dominate role of local governments will be reduced and that of central government will be strengthened largely; therefore, fourthly, the "Big Department System Reform", whose purpose is to unite those separate government departments as a whole, will be the core for the next stage cultural system reform.

At last, this book says that more work needs to be done either in the filed of policy study or in that of policy making. We need to adopt more countermeasures to deal with the situation of the co-existence of "shortage" and "superfluous" in cultural production. We need to construct a united and comprehensive cultural management system to replace the old separate management system. In short the continuous deepening reform of cultural system is still the most powerful engine for the development of China's cultural industries in next ten years.

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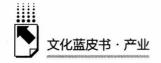
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