

B

创意城市蓝皮书®

创意书系

BLUE BOOK OF CREATIVE CITIES

张京成 / 总编

武汉文化创意产业发展报告 (2014)

WUHAN REPORT ON CULTURAL
AND CREATIVE INDUSTRIES (2014)

主 编 / 黄永林



社会科学文献出版社
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

2014
版



· 中国创意产业研究中心 ·

创意城市蓝皮书

BLUE BOOK OF
CREATIVE CITIES



总 编 / 张京成

武汉文化创意产业发展报告 (2014)

WUHAN REPORT ON CULTURAL AND CREATIVE INDUSTRIES
(2014)

主 编 / 黄永林



社会科学文献出版社
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

图书在版编目(CIP)数据

武汉文化创意产业发展报告. 2014/黄永林主编. —北京: 社会科学文献出版社, 2014. 12

(创意城市蓝皮书)

ISBN 978 - 7 - 5097 - 6692 - 7

I. ①武… II. ①黄… III. ①文化产业 - 产业发展 - 研究报告 - 武汉市 - 2014 IV. ①G127. 631

中国版本图书馆 CIP 数据核字 (2014) 第 247805 号

创意城市蓝皮书

武汉文化创意产业发展报告 (2014)

主 编 / 黄永林

出 版 人 / 谢寿光

项目统筹 / 恽 薇 王莉莉

责任编辑 / 王莉莉

出 版 / 社会科学文献出版社·经济与管理出版中心 (010) 59367226

地址: 北京市北三环中路甲 29 号院华龙大厦 邮编: 100029

网址: www.ssap.com.cn

发 行 / 市场营销中心 (010) 59367081 59367090

读者服务中心 (010) 59367028

印 装 / 北京季蜂印刷有限公司

规 格 / 开 本: 787mm × 1092mm 1/16

印 张: 23.25 字 数: 376 千字

版 次 / 2014 年 12 月第 1 版 2014 年 12 月第 1 次印刷

书 号 / ISBN 978 - 7 - 5097 - 6692 - 7

定 价 / 89.00 元

皮书序列号 / B - 2013 - 320

本书如有破损、缺页、装订错误, 请与本社读者服务中心联系更换

 版权所有 翻印必究

《创意城市蓝皮书》总序

张京成

城市是生产力发展到一定阶段的产物，并随着生产力的发展而不断升级。时至今日，伴随着工业文明的推进和文化的提升，以及服务业的大力发展，经济增长方式的转变和产业结构的调整正在推动一部分城市向着一个前所未有的高度迈进，这就是创意城市。

创意城市已经为众多有识之士所关注、所认同、所思考。在全球性竞争日趋激烈、资源环境束缚日渐紧迫的形势下，城市对可持续发展的追求，必然要大力发展附加值高、渗透性强、成效显著的创意经济。创意经济的发展实质上就是要大力发展创意产业，而城市是创意产业发展的根据地和目的地，创意产业也正是从城市发端、在城市中集聚发展的。创意产业的发展又激发了城市活力，集聚了创意人才，提升了城市的文化品位和整体形象。

纵观伦敦、纽约、东京、巴黎、米兰等众所周知的创意城市，其共同特征大都离不开创意经济：首先，这些城市都在历史上积累了一定的经济、文化和科技基础，足以支持创意经济的兴起和长久发展。其次，这些城市都已形成了发达的创意产业，而且能以创意产业支持和推进更为广泛的经济领域创新。最后，这些城市都具备了和谐包容的创意生态，既能涵养相当数量和水平的创意产业消费者，又能集聚和培养众多不同背景和个性的创意产业生产者，使创意经济行为得以顺利开展。

对照上述特征不难发现，我国的一些城市已经或者正在迈向创意城市，从北京、上海到青岛、西安、无锡等二线城市，再到义乌、丽江等中小城市，我们自2006年起每年编撰的《中国创意产业发展报告》一直忠实地记录着它们的创意轨迹。今天，随着创意产业蔚然成风，其中的部分城市已经积累了相当丰富的实践经验以及大量可供研究的数据与文字资料，对其进行专门研究的时机已经成熟。

因此，我们决定在《中国创意产业发展报告》的基础上，逐步对中国各主要创意城市的发展状况展开更加深化、细化和个性化的研究和发布，由此即产生了《创意城市蓝皮书》，这也是中国创意产业研究中心“创意书系”的重要组成部分。希望这部蓝皮书能够成为中国每一座创意城市的忠实记录者、宣传推介者和研究探索者。

是为序。

Preface to the *Blue Book of Creative Cities*

Zhang Jingcheng

City came into being while social productivity has developed into a certain stage and upgrades with the progress of the productivity. Along with the marching of industrial civilization, cultural development, the growth of the service industry, the transformation of economic growth and the adjustment of industrial structure, cities worldwide have by now entered an unprecedented stage as of the era of creative cities.

Creative cities have caught the attention from various fields these years. While the global competition for limited resources gets heated, sustainable development has become the only solution for cities, which brings creative economy of high added value and high efficiency into this historic stage. Creative industries is the parallel phrase to creative economy, which regards cities as the bases and the core of the development, and cities are also the place where creative industries started and clustered. On the other hand, creative industries helped to keep the city vigorous, attract more talents and strengthen the public image of the city.

From the experiences of world cities such as London, New York, Tokyo, Paris, and Milan, creative economy has been their common characteristic. First, histories of these cities have provided them with certain amount of economic, cultural and technological resources, which is the engine to start and maintain creative economy; second, all these cities have had sound creative industries which can function as a driving force for the innovation and economic growth of the city; finally, these cities have fostered harmonious and tolerant creative ecology through time, which conserves consumers of creative industries, while attracting more creative industries practitioners.

It can be seen that some Chinese cities have been showing their tendency on the way to become creative cities, such as large cities of Beijing and Shanghai, medium - size cities of Qingdao, Xi'an, Wuxi and even small cities of Yiwu and Lijiang, whose development paths have been closely followed up in our *Chinese Creative Industries Report* started in 2006. By now, some cities have had rich experiences, comprehensive data and materials worthy to be studied, thus the time to carry out a special research has arrived.

Therefore, based on *Chinese Creative Industries Report*, we decided to conduct a deeper, more detailed and more characteristic research on some active creative cities of China, leading to the birth of *Blue Book of Creative Cities*, which is also an important part of Creative Series published by China Creative Industries Research Center. We hope this blue book can function as a faithful recorder, promoter and explorer for every creative city in China.

《武汉文化创意产业发展报告 (2014)》

编 委 会

顾 问 唐良智 刘玉珠 王家新 王永章 刘玉堂

编委会主任 马 敏 李述永

编委会副主任 黄永林 潘堂林 吴 清 金伟成 彭 浩
吴志振 陈邈馨 张 侠 潘建桥 夏亚民

编委会委员 (按姓氏拼音排序)

纪东东 李 林 刘 秒 孙传明 谈国新
万 磊 王五洲 吴天勇 夏 天 徐金龙
乐敏霞 詹一虹 张 敏 张文元 章建育
朱向梅

主 编 黄永林

副 主 编 吴天勇 詹一虹 谈国新

参 编 成 员 (按姓氏拼音排序)

毕 曼 曹 浩 陈燕铭 程 啸 傅建新
傅 明 龚 勤 谷润芳 韩愈霞 侯西龙
胡 增 黄爱华 蒋海军 李兰青 李妮妮
刘庆国 龙 婷 马丽莎 马培红 马 迅
齐 君 秦 璇 盛从峰 史 瑾 宋 奕

孙 明	陶 辉	陶劲松	童 丹	万冬冬
汪海粟	王莎莎	王月月	文立杰	吴 焜
吴叶爽	夏 璐	肖静可	宣 炜	于洪铃
余 晟	张帮晋	张立龙	张 璐	张 蕊
张武桥	赵 琳	周卯初	周雨城	庄 黎

主编简介

黄永林 男，汉族，湖北仙桃人，1958年8月出生。教授，博士生导师，华中师范大学副校长、国家文化产业研究中心主任，中国新文学学会会长，中国民俗学会副会长，中国民俗教育专业委员会主任，武汉市文化和科技融合工作专家委员会主任委员，湖北经济团体联合会执行主席。出版著作有《从资源到产业的文化创意——中国文化产业现状述评》、《文化产业纵横谈》、《农村文化建设》、《中国民间文化与新时期小说创作》、《民间文化与荆楚民间文学》、《大众视野与民间立场》、《民间文学导论》和《比较与阐释：中西通俗小说叙事》等20多部，发表论文近200篇；主持国家级、省部级重大重点项目10余项、一般项目20多项。其中，“中华民族文化保护、创意与数字化”项目获第四届文化部创新奖，《民间文学导论》（合著）获国家教委优秀教材一等奖，《中国民间文化与新时期小说创作》和《比较与阐释：中西通俗小说叙事》分别于2009年和2012年获教育部高等学校科学研究优秀成果（人文社会科学）学术著作二等奖，《民间文化与荆楚民间文学》获中国民间文艺学术著作（2004~2006）二等奖和湖北省社会科学优秀成果学术著作二等奖，《郑振铎与民间文艺》获中国民间文艺学奖“山花奖”。

摘 要

创意是文化创意产业的核心，是推动文化创意产业发展的内生力。设计是创意的实现途径，设计产业与文化创意产业密不可分。2009年武汉市“两会”上首次提出要“打造工程设计之都”，2011年市长唐良智在达沃斯论坛上提出要将设计理念融入城市社会经济文化发展的方方面面，成为武汉的新战略，创新创意成为武汉再次起飞的新引擎。本报告以“设计创意与武汉文化创意产业发展”为主题，概括了2013年度武汉文化创意产业及文化事业发展的基本情况，阐述了设计创意与武汉文化创意产业发展的内在机制，分析了武汉特色文化创意产业的发展现状，以工程设计、工业设计、数字创意等领域为切入点，重点介绍了武昌、青山、洪山、东西湖等城区和东湖新技术开发区设计创意产业的发展情况，并选取中南建筑设计院股份有限公司、中铁大桥勘测设计院有限公司、东风汽车公司等武汉工程设计和工业设计领域的优秀企业进行深入研究。同时，报告也指出了现阶段武汉文化创意产业发展所面临的问题和挑战，对未来武汉文化创意产业的发展进行了展望。全书共分为五个部分：第一部分为总报告，第二部分为区域报告，第三部分为理论探讨，第四部分为案例分析，第五部分为附录。

Abstract

As a core in cultural and creative industries, creativity internally drives the development of cultural and creative industries, and with design as a realization approach to creativity, design industry has greatly been bonded with cultural and creative industries. The concept “building a metropolis of engineering design” has been put forward during two sessions in Wuhan in 2009, which mayor Tang Liangzhi has proposed to blend into each aspect of urban social, economic and cultural development in Davos in 2011, a new strategy for Wuhan, and in which way, making innovation and creativity a new engine of Wuhan for another taking off. On the theme of “creative design and development of Wuhan cultural and creative industries”, this report has made a summary of development situation for Wuhan cultural and creative industries and cultural undertaking 2013, elaborated internal mechanism between creative design and Wuhan cultural and creative industries development, made a conclusion of achievements in Wuhan characteristic cultural and creative industries, plus paid a special attention to the development of design industry in Wuchang District, Qingshan District, Hongshan District, Dong xihu District and East Lake Hi-Tech Development Zone, and selected Central-South Architectural Design Institute Co., Ltd., China Railway Major Bridge Reconnaissance & Design Institute Co., Ltd., Dongfeng Motor Corporation, and other excellent enterprises in engineering and industrial design for an in-depth study. At the same time, this report has also set forth the difficulties and challenges Wuhan cultural and creative industries are facing at the present stage, and made a prospect of them in the future with further advance in cultural and creative industries. This book is made up of five parts, with the first part as General Report, the second as Regional Reports, the third as Theoretical Discussions, the forth as Case Studies and the fifth as Appendixes.

前言

作为一个新兴的产业门类，文化创意产业短短几十年的发展历程已经将它所蕴含的经济潜力和提升国家形象的作用完全彰显。从 20 世纪 90 年代英国政府成立“创意产业特别工作小组”，第一次将文化创意产业发展放在国家战略位置开始，美国、日本、韩国、新加坡等国家纷纷出台了支持文化创意产业发展的政策，努力将其发展为国民经济的支柱产业，发展文化创意产业成为世界范围内的洪流。随着《文化产业振兴规划》的颁布，中国也将文化产业的发展提升到国家战略高度，北京、上海、深圳、南京、武汉、成都等主要城市纷纷将文化创意产业当成支柱产业来培育。

文化创意产业自发展之初便具有高智力性和高附加值的经济特征，特别是文化与科技的快速融合，文化产业与信息技术、数字传媒技术的联系更加密切，文化创意产业的重心越来越由“文化资源”向“设计创意”转移，以创意和设计为核心的智力资本逐渐成为创意产业发展的关键，“设计创意”已然成为文化创意产业发展的主题。为加快发展文化创意产业，武汉市颁布实施的《武汉市文化产业振兴计划（2012～2016 年）》中要求“加快发展创意设计、网络文化、动漫游戏等极具活力和潜力的新兴文化产业，改造提升传媒出版、演艺娱乐、文化旅游、艺术品业、会展等传统文化产业”，文化创意产业发展进入了一个崭新阶段。

2013 年是武汉文化创意产业快速发展的一年。围绕“工程设计”和“工业设计”的设计创意产业发展尤为突出。以湖北中铁大桥勘测设计院有限公司为代表的桥梁设计企业完成了长江上 70% 的桥梁，以及全国 80% 的大型、特大型桥梁的设计建设，“武汉设计”的工程项目遍布全国各地及世界十余个国家与地区；作为国内汽车行业三大集团之一的东风汽车公司凭借自主创新、设计创意提升了品牌核心竞争力，获评 2013 年度中国十大最具影响力企业，



成为汽车行业的翘楚；中南建筑设计院股份有限公司始终以“创新创意、至诚至精”为宗旨，先后在全国各地及世界 18 个国家、地区完成了 7000 余项工程设计，其中有 400 余项工程获国家级、部级、省级优秀设计奖和科技进步奖。洪山区、青山区、武昌区等也积极制定了创意设计产业的发展纲要，锐意打造创意设计中小企业集群，区内以企业为主体、市场为导向、产学研相结合的工业设计创新体系不断完善。

武汉市委、市政府高度重视武汉文化创意产业的发展，发展文化创意产业已被列为武汉建设国家中心城市的重要内容，“打造工程设计之都”的目标被列入《武汉市国民经济和社会发展的第十二个五年规划纲要》中，也是武汉市现代服务业升级十大示范项目、文化与科技融合的十项示范工程、城市五年攻坚计划的重要组成部分。2013 年，武汉市工程设计产业生产总值增加到 815 亿元，武汉工程设计产业发展规划中“一城两园七片区”总体布局逐渐形成，设计之都的核心区、创新企业的聚集地、设计文化的展示区、设计产业的商务区等产业园区的建设都取得了新的突破，沌口武汉设计产业园、四唯路城市景观设计片区、湖北美术学院昙华林艺术创意园区建设工程稳步推进。

《武汉文化创意产业发展报告（2014）》围绕“设计创意与武汉文化创意产业发展”的主题，概述了 2013 年武汉文化创意产业发展的整体情况，并结合各设计创意的主要行业和武汉主要行政区发展文化创意产业的状况，分析探讨了设计创意与文化产业发展的关系。全书共分为五个部分：第一部分为总报告，结合发展数据整体分析了武汉文化创意产业发展的概况，总结归纳了 2013 年武汉文化创意产业的发展特点，针对现阶段武汉发展文化创意产业的问题和挑战提出了可选择的突破路径，并对下一阶段武汉文化创意产业的发展进行了展望。第二部分为区域报告，选取了武汉市武昌区、洪山区、东湖高新区、东西湖区以及青山区五个功能区，从微观角度探析文化创意产业在武汉各区的发展状况，并提出了对策建议。第三部分为理论探讨，结合武汉市服装设计、动漫设计、公共文化服务体系以及文化体制改革等的具体实际，就文化创意产业发展与设计创意的关系进行了理论探讨。第四部分为案例分析，以中南建筑设计院股份有限公司、中铁大桥勘测设计院有限公司、东风汽车公司等设计创意发展较为突出的优势企业为典型案例，通过深入分析它们取得突出成就

的原因，力图为其他文化创意企业的发展提供借鉴。第五部分为附录即大事记，以时间为线索，厘清了 2013 年武汉文化创意产业发展的整体脉络，系统地记录了武汉文化创意产业的发展脚印。

本报告收集、整理和分析了来自各传媒渠道的武汉文化创意产业发展的大量数据及文献和案例，参阅了武汉市有关职能部门和相关企业等提供的重要数据资料。由于编者水平有限，书中难免存在疏漏之处，敬请读者批评指正。

Introduction

Cultural and creative industries are sunrise industries. In the past decades of development, they have fully demonstrated their economic potential and the role played in enhancing national image. In the 1990s, British government established “creative industry task force” and initiated to highlight cultural and creative industries to a national strategic position, and then various nations, such as the USA, Japan, Korea and Singapore, formulated policies to support the development of cultural and creative industries and push them into pillar industries of national economy. It becomes a worldwide trend to develop cultural and creative industries. With the enforcement of *Cultural Industry Revitalization Project*, China elevated the development of cultural industries to a national strategic height as well. Major cities, such as Beijing, Shanghai, Shenzhen, Nanjing, Wuhan and Chengdu, followed the trend and turn to develop the cultural and creative industries as pillar industries.

From the beginning, the cultural and creative industries are characterized by the high knowledge basis and high added value, a case in point is the rapid integration of culture and information technology. Cultural industries are now more closely connected with IT and digital communication technology, the focus of cultural and creative industries are now continuing to be shifted from “cultural resources” to “creative design”. Intellectual capital centered on creation and design is gradually becoming a key point in the development of creative industries and “creative design” has already become important topic in the development of cultural and creative industries. In order to expedite the development of cultural and creative industries, Wuhan municipal government formulated and enact *Cultural Industries Revitalization Project of Wuhan (2012 ~ 2016)*, which requires to “expedite the development of creative design, internet culture, cartoon game and other energetic emerging cultural industries with development potential and reform and promote the development of traditional cultural industries such as printing, entertainment, cultural tourism, artwork industry, exhibition, etc.”, the cultural and creative industries stepping into

a brand new era of development.

The past few years witnessed the rapid growth of the cultural and creative industries in Wuhan, specially the creative design industries focusing on “industry design” and “engineering design”. Bridge design companies, represented by China Railway Major Bridge Reconnaissance & Design Institute Co., Ltd. (Hubei branch), have completed the design and construction of 70% of the bridges on Yangtze River and 80% of the major and super bridges across China, expanding engineering projects titled “Designed in Wuhan” all over China and even to over ten countries and regions of the world. Dongfeng Automobile Co., Ltd. was listed as one of *China's Top 10 Influential Enterprises 2013* on the basis of its core brand competitiveness strengthened by independent innovation and creative design, becoming a leading force in automobile industry. Central-South Architectural Design Institute Co. Ltd., adhering to the tenet of “Creation, Innovation, Integrity and Profession”, has undertaken over 7, 000 engineering designs all over China and 18 countries in the world, of which 400 are granted with national, ministerial and provincial design excellence and science & technology progress award. Hongshan District, Qingshan District, Wuchang District and other areas are striving to formulate development outlines for creative design industries, aiming to realize cluster development for small and medium-sized design enterprises. Within the districts, the industrial design creation system is improved with enterprises as the main body, guided by the market and with the integration of industry, university and research.

Wuhan Municipal Party Committee and Municipal Government highlight the development of cultural and creative industries in the city; the development of cultural and creative industries have been listed as major content in building Wuhan into a national key city and the target of “building an engineering design city” is brought into the *Outline of 12th Five Year Plan for Wuhan Economic and Social Development*, and is listed as major component in top 10 demonstration projects in the upgrading of modern service industry in Wuhan, top 10 demonstration projects with the integration of science & technology and culture and the crucial five plans of the city. In 2013, the total output value in Wuhan's design industry climbed to RMB 81.5 billion Yuan. The overall layout of “One City, Two Parks and Seven Districts” in the development plan of the engineering design industry in Wuhan was formed. Constructions in the core zone of the engineering city, the gathering place



of innovative enterprises, demonstration area of design culture and commercial area of design industry obtained new breakthroughs. Wuhan design industrial park in Zhuankou, urban landscape design area in Siwei Street and Tanhua artistic innovation park of Hubei Institute of Fine Arts are under steady construction.

Wuhan Report On Cultural And Creative Industries (2014), centering on the “creative design and the development of cultural and creative industries in Wuhan”, outlined the overall development conditions of Wuhan’s cultural and creative industries in 2013 and analyzes the relationship between creative design and the development of cultural and creative industries with reference to the main creative design industries as well as the development conditions of the cultural and creative industries in major administrative districts of Wuhan. The book is composed of five sections: Section I is the General Report, analyzing the overall development conditions of the cultural and creative industries in Wuhan with reference to the development data, putting forward suggestions aiming at the dilemma and challenges confronted by the cultural and creative industries at present in Wuhan and looking into the development prospect of the cultural and creative industries in Wuhan in the next stage. Section II is Regional Reports, in which five major functional zones, Wuchang District, Hongshan District, East Lake Hi-Tech Development Zone, Dong Xihu District and Qingshan District, are selected to explore the development conditions of cultural and creative industries in different districts of Wuhan, with corresponding solutions and suggestions raised. Section III is the Theoretical Discussions, exploring the development law of creative design industries by the theoretical researches concerning the relationship between the development of cultural and creative industries and creative design, with reference to the realities in Wuhan’s reforms in the field of clothes, cartoon design, public service system of culture, cultural system, etc. Section IV is Case Studies, where enterprises with outstanding development in creative design, such as Central-South Architectural Design Institute Co., Ltd., China Railway Major Bridge Reconnaissance & Design Institute Co., Ltd., Dongfeng Automobile Co., Ltd. are taken as examples to analyze what leads to their achievements so as to serve as a reference for the development of other cultural creative enterprises. Section V is Appendixes, which happened in 2013 concerning the integrated development of the cultural and creative industries in Wuhan and it records the footprints of the development of creative design in Wuhan.

Since the initial preparing stage of this report, we have been collecting, systemizing and analyzing various cases, data and documents concerning the development of cultural and creative industries in Wuhan. Wuhan relevant departments and enterprises have provided crucial data. As a result of the time limitation and the restriction of the editor's ability, there might be careless omissions in the contents; therefore, your criticism and correction are appreciated.