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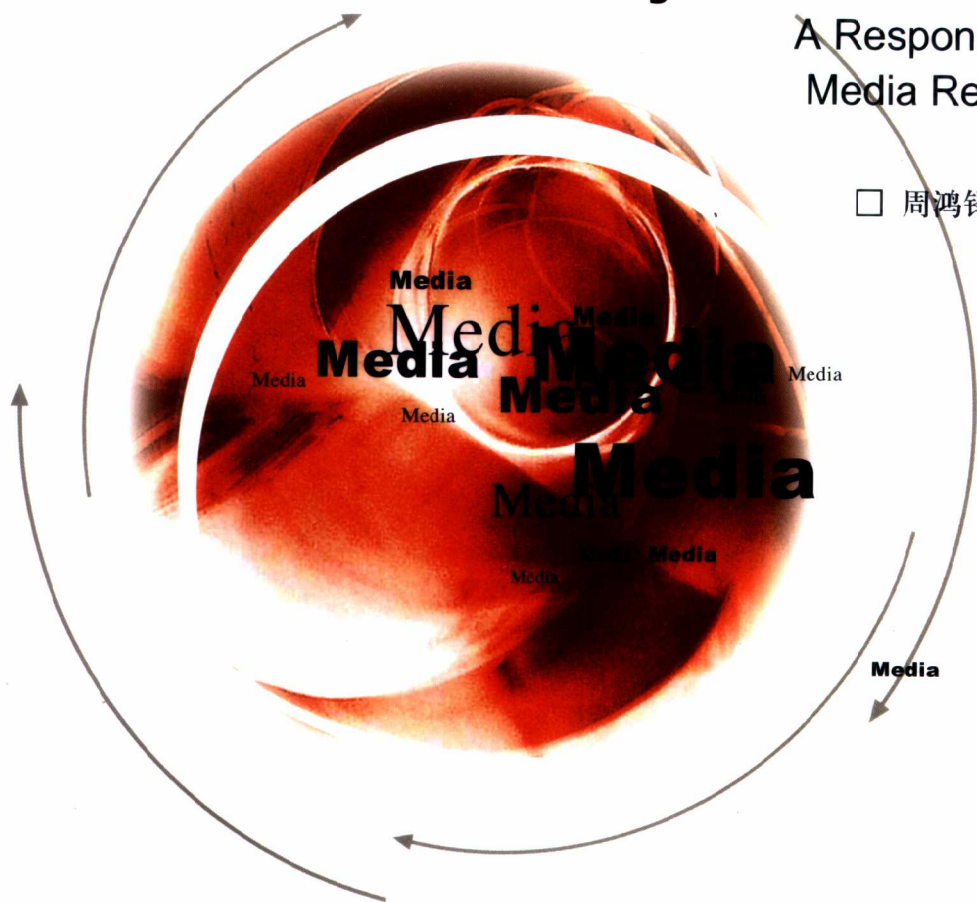
洞析媒介

—— 回应传媒变革

Analysis of Media :

A Response to
Media Reform

□ 周鸿铎 著

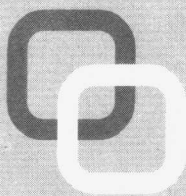


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序 言



本序言明确指出了本书的特点：具有前瞻性、可操作性，是当前研究我国媒介改革及其发展走势的理想读物，同时为媒介经营决策提供了充分的理论和实践依据。

本序言就当前人们关注的广电集团如何发展的问题、如何发挥媒介在建设和谐社会中的作用问题、如何发展数字化电视问题等，从理论的角度提出了一些很有价值的观点。

本书是我 2004 ~ 2005 年在全国各地演讲稿的一部分。为了提高演讲效果，在演讲时曾采用了幻灯片的形式；在内容分析上采用了理论与实践相结合的方式，只讲述重点问题和核心问题，突出我国媒介产业发展过程中亟待解决的问题，既便于对媒介产业发展规律的理解和把握，又便于操作。

本书在出版时又根据演讲稿的提纲重新撰写而成，既保持了演讲稿的重点。又增加了许多新内容。同时便于为那些工作忙、读书时间少的媒介人阅读，从序言起，每章前面都增加了内容提要部分，便于读者抓住关键性问题和重点理论观点。本书所讲述的理论具有前瞻性，为深化媒介体制改革进行了较深入的理论性和预测性分析；具有可行性，本书用定量分析和定性分析相结合的手段，对媒介产业发展过程中的许多环节以及某一具体环节或环节链上已出现的或潜在的问题都提出一些相应的解决办法、策略；具有知识性，便于统一人们的认知，有利于减少媒介经营与管理中出现偏差的概率……

借本书出版的机会，简要分析一下当前媒介产业改革过程中的三个引人发醒的问题。这三个问题是：中国广播电视集团的“改革”是否意味着广播电视产业就不组建集团了？如何发挥媒介在建设和谐社会中的作用？



如何发展我国的数字电视产业？

（一）如何促进中国广播电视集团的大发展

中国广播电视集团是我国广播电视产业系统“最大的”，也是“最小的”一个事业性媒介集团。所谓“最大”，一是因为它是以“中国”冠名的；二是因为它由中央三大台（中央人民广播电台、中国国际广播电台、中央电视台）和中国电影集团、中国广播电视传输网、中国广播电视互联网等单位构成，2001年12月6日成立时，曾对外宣布：该集团拥有职工两万多人，拥有固定资产214亿元人民币和年收入110亿元人民币……所谓“最小”，是指真正的集团职工只有84人，从该集团成立之日起到2005年的4年间从未开展过任何业务活动，内部机构尚未健全。这也是后来决定其解体的一个重要原因。现在，中国广播电视集团已经解体，但是，集团的“招牌”还可以暂时保留一个阶段，这可谓真正的名存实亡的典型案例。中国广播电视集团解体后，许多人问我：广播电视集团是否要解散？现在已组建的广播电视集团怎么办？如果组建广播电视集团的方向是对的，那么应该如何组建等等。怎样看待中国广播电视集团的解体呢？

广播电视是信息产业群中的一种分支产业，组建产业性广播电视集团是历史的必然，是广播电视产业发展的必然，是市场经济成熟化的一种表现。广播电视媒介这种发展走势迫使人们必须承认它，认识它，按照它的发展规律办事。否则，将会受到规律的惩罚。1999年，国家广电总局在人们没有认识广播电视产业发展规律的前提下，人为地以“事业性”的传统做法批准成立了江苏无锡广电事业集团，从此拉开了我国成立广播电视“事业性”集团的“序幕”。无锡广电集团的成立，说明我国广播电视人已承认了我国广播电视媒介必须走集团化的道路，但是并没有认识到广播电视集团的本质是产业性集团，也没有弄清楚组建集团的目的是整合广播电视资源，人为地以“事业性”机关的模式去组建广播电视集团，以行政手段去指导已组建的广播电视集团的全部工作。实践是检验真理的唯一标准。集团只能是产业性集团，根本不存在“事业性”集团。为了纠正这一失误，2005年1月，国家广电总局明确指出：从今年起不再组建“事业性”广播电视集团，已经组建的可改成总台，如果开展经营性活动，必须实行可经营性资产剥离。在这种背景条件下，我国广电系统出现了两种现象，即中国最大的广播电视集团——中国广播电视集团停止了集团活动，并对集团职工进行了重新分配；北京广播电视集团将电台、电视台又划归

北京市广播电视局管理。这种现象的出现在全国广播电视系统内部引起了强烈反响,许多人认为:中国不组建广播电视集团了,不开展产业经营了,不再进行改革了等等。怎样看待和处理这些问题?这是摆在中国广电人面前的一个十分现实的问题,它直接关系到中国广播电视的发展方向,因此必须有一个正确的认识和采取正确的对策。

理论和实践都证明:“事业性”广播电视集团绝对不能再组建,它不仅阻碍了广播电视产业的发展,而且是一种逆历史发展规律的行为,是不懂广播电视产业和市场经济的表现。但是,产业性广播电视集团是必须组建的,它既是广播电视产业发展规律的要求,也是市场经济对广播电视产业的要求。不过,广播电视产业集团的组建,不能采用行政手段,只能通过市场来实现,否则,还会出现名义上的产业性集团,实际上的“事业性”集团。如果真的出现了这种状况,就是在我国广播电视产业的“伤口”上又放了一把盐,就是对人民的犯罪。

根据我国的实际,要促进我国广播电视产业集团的发展,当前应从以下几个方面做出努力。

其一,进一步提高对包括广播电视媒介在内的媒介二重性的认识。关于媒介二重性理论,从提出到现在已有20多年的历史了,理论和实践都证明这是一种科学的理论。现在,在媒介二重性理论的问题上,人们已基本形成共识,特别是决策者已把这种理论作为制定政策的一种依据。但是,这不等于是人们对媒介二重性理论的认知度都达到了一定的高度,差异性还是存在的。对媒介二重性理论认知的差异性广播电视产业发展过程中出现问题的主要理论原因。

其二,科学地理解和实施国家关于媒介产业发展的基本政策。党的十六大以后,关于发展我国文化产业的许多政策都讲述得十分明确。比如对于文化产业重要组成部分的媒介产业,国家明确规定:对于印刷媒介要实行产事分开、产政分开的政策;对于广播电视产业要实行制播分离政策;对于网络产业要实施完全产业化、市场化的政策。同时还规定,支持和鼓励民营媒介产业的发展。政策的威力来自科学的实施。因此,对于党和国家关于媒介产业发展的各项政策要认真学习,真正学懂、学通,只有这样,才能保证用好、用活,进而发挥正确政策的威力。目前在广播电视系统内部有一种思想倾向,即抱怨国家没有具体的广播电视产业发展的政策。这是没有认真学习党和国家政策的一种表现,或者说没有深入学习的表现。我国是一个大国,各地差异性很大,国家只能在宏观上进行政策指导,各地应根据自己的实际制定出具体的实施办法。这样,既可以避免



一刀切现象的出现,又可以充分发挥地方的积极性,使广播电视产业突出地区特色。

其三,做好现有广播电视集团的改造。现有广播电视集团的核心错误是定性问题,其他问题都是由定性问题引申出来的。只要抓住定性问题对广播电视集团进行改造,逐步将“事业性”集团改造成产业性集团,并按照产业集团的要求对现有的广播电视集团进行全面的重组,现有广电集团存在的问题是可以逐渐解决的。实施改造是一种积极的政策,是上策;简单地或变相地取消不是上策,将会引起许多不必要的麻烦。对现有广播电视集团改造的基本原则就是产业化、市场化,纠正用行政手段“包打天下”的做法。

其四,支持和发展民营广播电视产业。广播电视既然是一种信息产业,而且它的发展又同市场紧密相连,因此,打破“垄断”,充分发挥民营广播电视产业在我国广播电视产业发展中的作用,是市场经济对广播电视产业的一种要求,也是广播电视产业发展所必需的。为保证民营广播电视产业的发展,就必须制定相应的政策,发挥市场机制对民营广播电视产业的调节作用。

其五,实现广播电视网、电信网、Internet网的融合。三网合一信息时代网络经济发展的必然,但是,目前在我国,一方面是网络技术的发展迫切要求三网合一,另一方面是行政区划严重地阻碍其融合,于是出现了三网发展相互受阻的现象。这样既增加了网络经济发展的成本,又影响了三网各自功能的实现。怎样解决这个问题呢?从国家宏观政策来分析,就是要深化体制改革,具体到媒介产业的角度分析,就是运用大媒介观来组建有中国特色的媒介产业集团,这既是实现“三网合一”的组织保证,也是完善我国媒介产业体系的必然要求。

其六,建立新型的广播电视产业制度,这是组建广播电视产业集团的组织保证。根据我国的实际,“转制”是实现广播电视产业化、集团化的关键。所以,要组建符合广播电视产业化要求的广电集团,当前应该以改革国有广播电视产业制度为重点,积极培育民营广播电视产业体系,面向市场进行机制创新,完善法人治理结构,建立以股份制为核心的现代企业制度。

总之,在我国组建媒介产业集团过程中,由于历史的原因和认识上的原因,曾出现了一些问题。但是,这并不可怕,只要认识了,改过来就是了。现在最可怕的是否定中国广播电视的产业化和集团化道路,因为,这种“否定”同样是一种与广播电视产业发展规律相悖的行为,是有碍广播

电视产业发展的,是不利于提高广电竞争力的。所以,为了促进我国广播电视产业的发展,必须坚持广播电视产业化、集团化的方向,这是不能动摇的。

(二) 如何发挥媒介在建设和谐社会中的作用

和谐即事物的各要素(元素)配合适当、协调。对和谐社会来说,是指构成以一定物质生产活动为基础的而又互相联系人类生活共同体——社会各要素的最佳配合。这种最佳配合的和谐社会虽然具有必然性,但是它需要人们按照人类社会的发展规律去创建、营造,否则,它是不会自然形成的。从总体上讲,创建和营造和谐社会需要全人类的共同努力,但是,在国家存在的条件下,首要的是国家内部各民族、各地区、各部门以及社会活动各环节之间的和谐。实现这种和谐需要社会各部门的共同努力,在这些部门中媒介起着十分重要的作用。那么,如何发展媒介在建设和谐社会中的作用呢?根据我国的实际和媒介现有的地位及作用,第一,深化媒介体制改革,使媒介体制同我国经济体制相适应,同我国的市场经济发展的要求相适应;第二,扩大媒介的舆论监督功能,保证媒介活动的健康发展;第三,拓宽媒介传播信息的范围,特别是要拓宽对民生信息传播的范围,通过对民生信息的传播拉近百姓与政府的距离,反映政府服务于百姓的具体活动,体现胡锦涛同志提出的“群众利益无小事”的根本要求。在拓宽媒介传播信息范围的过程中,要注意处理好民生信息传播与时政新闻传播的关系,注意民生信息传播的质量和内容的把关;第四,要重视媒介产业功能的发挥,正确处理媒介产业活动的经济效益和社会效益的关系;第五,树立科学的发展观,根据市场经济的要求和媒介产业发展规律,有效地发挥媒介在建设和谐社会中的作用。

(三) 如何发展我国的数字电视产业

数字化是电视产业发展的方向,但是我国数字化电视发展速度较慢。原因是什么?有人认为是技术问题,于是不计成本地推广机顶盒。其实,这并不是阻碍我国数字化电视的主要症结。数字技术的使用可以提高电视的清晰度,受众可以选择更多的频道,但是,由于我国电视管理体制方面的原因,电视节目同质化现象相当严重,在这样的背景条件下,假设实现了电视数字化,可以增设更多的电视频道,但是内容并没有改变,这样,受众就没有必要购买机顶盒,也没有必要交纳收视费。根据这种



状况，当前发展我国的数字电视产业的核心问题是发展电视内容产业，这既是推进我国电视数字化的关键，也是提高电视产业市场竞争力的关键，否则，所谓发展数字化电视产业将是困难的。发展电视内容产业，也是组建广播电视产业集团的要求。

周鸿铎

2006年元月于北京

Forewords



The forewords makes it clear that this book is full of foresight. Meanwhile, it guides the operation. So it is an ideal book which study Chinese media reform and the trend of development. Furthermore, it supports decision making with abundant information of theory and practice.

The book puts forward some valuable point of view on how to develop China Broadcasting Group, how to play media's role in establishing a concordant society and how to develop China digital TV industry.

This book excerpts from my speech manuscript between 2004 to 2005 in various places. In order to improve the effect, I used slides in speeches. During analyzing, I combined theories with practice, and paid more attention to either important or core problems. In addition, this book gives prominence to problems that urgent to solve, which easy for us to understand, handle and operate regular patterns of media industry.

I added more new contents to the speech outlines before publishing this book. So it keeps the points of speeches as well as being convenient for those who are too busy to have spare time to read books. Furthermore, I added abstracts to every chapters so that readers could grasp the key points easily. In addition, this book has follow advantages; it is of



foresight, offers theoretical and predictive analyses to media system reform; it's of feasibility and combines quantitative analysis with qualitative analysis to propose lots of tactics to latent dangers in media industry; it's intellective, and easy to unity people's cognition and reduce deviation in media management, etc.

I would like to analyze three core questions in this book. They are: if China Broadcasting Group's reform means broadcasting industry doesn't need to organize groups? How to play media's role in establishing a concordant society? How to develop China digital TV industry?

(1) How to develop China Broadcasting Group?

In China, we could say China Broadcasting Group is either the biggest, or smallest media group. Why is it called biggest? Because its "family name" is China, and it includes follow corporations: Central People's Broadcasting Station, China Radio International, China Central Television, China Film Group, China Network of Broadcasting, China Internet of Broadcasting, etc. So when founded on 6th December 2001, it announced that this group had more than 200,000 staff members, 21,400,000,000 yuan fixed asserts and 11,000,000,000 yuan income every year. Why is it called smallest? Because in fact this coalition only has 84 full-time staff members. In addition, it had never developed any business between 2001 to 2005, and it has not consummate organization, which is the key reason why China Broadcasting Group was dismissed. Now, China Broadcasting Group has been dismissed. However, its name could retain for a while. So it's just nominal. After its dismissal, lots of people asked me: has the Group gone into a dead end? What about other media groups? if establishing groups is a right way, so how to deal with it? and what attitude should we take toward China Broadcasting Group's dismissal?

In China, it's necessary for us to organize broadcasting groups with the background of market economy. So we have to admit, recognize and follow media's regular patterns, or we'll be punished by it. In 1999, The



State Administration of Radio, Film and Television organized Wuxi broadcasting Group taking the form of institution unit without recognizing regular patterns of media industry. The found of Wuxi broadcasting Group proved that people with media jobs had realized that we should take the way of groups. However, we didn't realized the essence of group is enterprise, not institution unit. If we govern groups with administrative methods, maybe we'll meet the dead corner. In fact, groups must be enterprise, not institution unit. So in order to correct former mistakes, in January 2005, The State Administration of Radio, Film and Television pointed out that there won't be broadcasting groups of institution unit from this year on. If groups want to run the capital, they must peel the capital off first. So there are two strange things emerged: China Broadcasting Group stopped working, and rearranged its staff; Beijing Broadcasting Group peeled off its radio station and TV station to Beijing Administration of radio & Television, which surprised China media system. Several people doubted: if China won't organize broadcasting groups and carry out reforms? How to deal with these problems? We should treat these important problems cautiously.

Lessons from the failure of China media industry's predecessor proved that establishing broadcasting groups of institution unit wasn't a right way. So we must take the form of enterprise. In addition, we'd better to get rid of administrative way, and use the market to achieve media reform. In a word, we need groups of enterprise, or we'll meet a dead corner.

If we want to push the development of China broadcasting industry, we'd better take follow measures:

First, to know dual attributes of media better. Dual attributes of media was put forward more than 20 years ago, and had been proved a scientific theory. Furthermore, some policy-makers make decisions according to the theory. However, different people have different knowledge about dual attributes, which is the theoretical reason why we have problems in broadcasting industry's reform.



Second, to grasp China media's policies firmly. In China, especially after the 16th Central Committee of Communist Party, we have clear policy on media industry; we must take produce apart from politics in printing media industry; we must take produce apart from broadcasting in radio & TV industry; we must put network industry into market totally; further more, we must to support privately run of enterprises. If we carry out policies in a scientific way, we'll benefit a lot from it. So it's very necessary for us to grasp these policies firmly. Now, lots of persons complained that there was no concrete policy on media industry, which was totally wrong. China is a huge country, different places have different cultures and situations. So the government makes macroscopic policies, and different places make various concrete policies according to their features.

Third, to carry out the reform of broadcasting groups. Now, the key mistake is that we mix up institution unit and enterprise. There is one question that we must gain clear idea, that is if we want to organize groups, we must take the form of enterprise and take the way of market. To get rid of the form of institution unit and administrative way is the wise method.

Forth, to support privately run of enterprises. Broadcasting industry belongs to information industry, and has close relationship with market. So to break monopolism and support privately run of enterprise is our direction of development. Therefore, we should make policies related to developing these enterprises and make good use of market's function.

Fifth, to mix broadcasting network, telecommunication network and Internet together. We could say that it's inevitable for three networks to mix in information time. However, due to different administrative areas, the development of three networks cannot match each other. So the costs have been raised, meanwhile networks' function couldn't be brought into play very well. How to deal with this problem? The most effective method is to reform.

Sixth, to set up new system of broadcasting industry, which is the



key step in the reform. To reform systems of nationalized broadcasting industry, and support systems of nongovernmental broadcast & TV industry. To make clear the system of legal person, and establish modern system of enterprise based on joint-stock.

In above, we meet lots of problems in the process of reform due to kinds of reasons. However, difficulties themselves are not horrible. The most horrible behavior is to defy broadcasting is an industry, and the form of group. The misunderstanding is bad for our reform. So we must to stick to the direction of industry and group.

(2) How to play media's role in establishing a concordant society?

Concordance means every element coordinate each other very well. As a concordant society, people's material life, moral life and other elements would catch very well. We should establish a concordant society according to certain regular, or our hope will come to nothing. In addition, every nation, every area and every department in China have to coordinate. Media plays a very important role in these elements, so how to make good use of its function? I have three suggestions: 1, to push the reform of media industry, let media's system meets the need of market. 2, to expand media's function of public opinion. 3, to enlarge the field of reporting, especially the field of people's livelihood, which is beneficial for the relationship between government and common people. Mean-time, we should pay more attention to the content and quality of reporting 4, to deal with the relationship between economic profit and social effect. 5 according to the need of market and regular of media's industry, we should set up a scientific idea about media's development, and make good use of media's function.

(3) How to develop China digital TV industry?

TV industry's trend is to digitize television. However, digital television doesn't develop very well in China. For someone's part, the most impor-



tant reason is the technologic problems, which in fact isn't the key reason. With digital technology, we could receive clearer TV signals and more TV channels. But in China, due to the system of TV management, we receive TV programs of similar style. So even though we would digitize television and have more channels, there will be little changes, because we still have no change in TV programs. So there is no necessary for audience to buy set top box nor watching price. In short, the key point to push the development of China digital TV industry is to develop TV programs, or there will be a long way to go for China digital TV industry.

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