

创意引领中国新经济

创意产业

发展报告

(2009)

张京成/主编



中国创意产业发展报告

Chinese Creative Industries Report

(2009)

主编 张京成

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前言

自2006年“创意产业”字眼首次出现在官方文件——《国家“十一五”时期文化发展规划纲要》以来,各地争装“创意引擎”引领中国新经济,并相继出台了一系列扶植创意产业发展的相关政策,创意产业在国家和地方政府的大力支持下进行得如火如荼,取得了实质性和阶段性的进展。

四年以来,作为专注中国创意产业发展的一个研究团队,我们时刻关心着中国创意产业发展的进程,收集并整理分析相关政策规划和产业发展信息,在致力于研究创意产业发展战略的同时,我们及时跟踪创意产业发展的理论前沿,参与中国创意产业发展的实践,判断中国创意产业发展的方向与趋势,已连续三年出版了《中国创意产业发展报告》。

如今《中国创意产业发展报告2009》又如期付梓。对我们来说,如实记录创意产业每一年的发展轨迹不仅是一种责任,更是形成了一种习惯。

过去的一年,各地创意产业呈现出差别化定位、特色化发展的趋势,具有地方特色的“创意城市”正在不断涌现。基于这个基本判断和全球金融危机仍在蔓延和扩散的宏观经济环境,《报告2009》的基本框架大致分为三部分,第一部分为第一章“总报告:国际金融危机下的中国创意产业”;第二部分为第二章至第十七章,是本书的核心,其中第二章至第十六章是北京、上海、香港等十五个城市的分报告,第十七章为各城市政策特点的评析;第三部分即第十八章“新视点:创意产业发展探索与思考”,这一部分我们收录了一些最新的研究成果。

在总报告中,我们首先结合国际金融危机这个宏观经济环境对2008年我国创意产业整体状况进行了基本判断和定位:在世界金融危机的大背景下,我国创意产业良好的发展环境没有改变,并呈现出政策导向逐渐明确、人才建设更加系统、产业交流持续繁荣、重点行业逆势增长等特点;在此基础上,系统分析了我国创意产业目前阶段仍然存在的主要问题;最后是我们对我国创意产业发展趋势的一个预测。我们相信,展望2009年,中国创意产业将是一个面临更多机遇、对资本有更强吸引力、向其他产业不断渗透、发展特色更趋鲜明的一年。

第二部分为“创意城市”图谱和政策分析。这一部分沿袭“08 报告”的体例，纵贯全国十五个“创意城市”创意产业发展现状，突出“政策推动创意产业发展”的主题。我们不惜重墨大篇幅介绍这些“创意城市”的创意产业发展概况，例如“政策细化，投融资推进，奥运拉动”的北京，“用创意产业绘绣新姑苏繁华图”的苏州，“西南地区文化创意集散辐射中心”的昆明，等等，以期各地能相互学习，共同发展，从而促进整个创意产业走向新的发展历程。政策支持是各地发展创意产业的有力保障，在逐个介绍这些城市创意产业发展概况的基础上，我们对2008 年中国创意产业政策特点与政策需求进行了系统全面的评析，希望能够为国家和地方政府在制定创意产业政策时提供一定的参考。

在本书最后一部分的新视点中，发表了一些最新的研究成果。我们从全新的视角对创意产业相关概念进行了分析，提出了“创意产业的本质是提供差异化的精神体验”的论断；在“创意产业对经济增长的作用”的专题研究中，我们从经典的经济增长理论出发，沿着“索洛余值”的思路，提出创意是促进经济增长的全新生要素；在“发展创意产业需要扩大国内市场”的专题研究中，我们提出了金融危机背景下扩大创意产业国内市场的突破方向；我们还以深圳成为“设计之都”为例，剖析了“全球创意城市网络与创意产业发展的‘台—塔’模式”；此外在“创意农业”的专题研究中，作者探讨了“中国创意农业产业化发展战略及模式”，论述了“创意农业是新农村建设的有效途径”。

此外，我们对各地的创意产业政策、创意产业交流活动和各地产业规模数据进行了汇总，并且在附录中以表格的形式清晰地罗列了出来，供读者参考。

最后，相信这本《中国创意产业发展报告 2009》一定能够让你开卷有益。我们衷心希望这本书对地方政府政策的制定能够提供一定的参考，也欢迎相关研究人员和我们切磋交流，共同推动中国创意产业不断向前发展。同时，我们深信，在这场金融危机中，创意产业一定会逆势而上，在传统行业普遍低迷的情况下实现“弯道超车”，引领中国经济向着积极、健康、稳定的方向发展。

张京成

Preface

Since the first appearance of the term “creative industries” in the official document-*Cultural Development Outline during National 11th Five - Year Plan* in 2006, there have been a serial local government policies intended to promote creative industries and to pilot the Chinese new economy driven by “creativity engine”. Creative industries have progressed with great success thanks to the support from state and local governments.

During the last four years, China Creative Industries Research Center (CIRC), as a research team focusing on the creative industries development in China, have been devoting ourselves in sourcing and studying frontline theories of creative industries worldwide, collecting and analysing relevant information on industry planning and development in addition to observing the policy movement in China with outcome of three yearly publication of *Chinese Creative Industries Report*.

It has come to our realization that, with this *Chinese Creative Industries Report 2009* yet again in print, to faithfully record the development of creative industries is not only a duty but also a convention to us.

The overall development of creative industries bears the characteristics of heteronomy and diversity with continuous emerging of “creative city” with local flavour. There are three parts of this report based on this point of view and the macro environment of global financial crisis—the first part is Chapter I—General Report: Chinese creative industries under the global financial crisis; the second part is Chapter II to Chapter XVII, as the core of this book, with report on 15 of each individual

major cities such as Beijing, Shanghai and Hong Kong from Chapter II to XVI and the policy analysis of each city in Chapter XVII, the third part is Chapter XVIII - New Viewpoints: Thinking and discovery of creative industries theories, where we record some latest research achievements.

In General Report, we look at the impact of global financial crisis on overall development in 2008 with the conclusion that the creative industries in China have maintained favourable trends in spite of the worldwide economic downturn with a clearer policy direction, systematic talent stock, proper cross-industry involvement and steady growth in key sectors. Based on this, we analyse the major issues within the creative industries sector and predict the development trend in 2009. We believe that in 2009, creative industries will face more challenges as well as attract more venture capital with further infiltration to other sectors of the economy, and characteristics of it will be more extensively developed.

The second part is “creative city” trajectory and analysis. With “policy pushed creative industries” as the theme, this part of report lists the status quo of creative industries in 15 major cities in China taking on board the format of 2008 report. The purpose of such sizable list of all key cities’ current development, such as Beijing with theme of “detailed policy, progressive venture capital driven by Olympics”, Suzhou “to embroidery Gusu’s prosperity by creative industries” and Kunming as “South-eastern cultural creative industries agglomeration”, is to provoke the cities to learn from each other and progress accordingly to a new stage. Governments’ policy assistance is the safeguard of creative industries, therefore, we are hoping, by comprehensive and systematic analysis based on the examination of creative industries current situation for each individual city, that we provide some reference for the state or regional governments to formulate the relevant policies in creative industries.

At the last part of the book, we publish some latest research findings. In the discussion of “grasp the nature of creative industries, step out the misconception in practice”, we compare and explore the conception and connotation of cultural industries, experience industries, creative industries and cultural & creative industries from a brand new angle; in the theme of “The role of creative industries on economic

growth—the new interpretation to Solow Residual in creative economy”, starting from classic theories of economic growth along the stream of Solow Residual, we propose that creative industries are a new ingredient of production; in the debate of “expand domestic market, develop creative industries”, we indicate the points of breakthrough related to domestic market with the worldwide financial crisis as background; we sample Shenzhen, “City of Design” and evaluate the “platform-tower” model of “Global creative cities network and creative industries development”. In addition, in the study of “creative agriculture: the effective way of constructing new countryside” and “The strategy and development model of industrialization of creative agriculture”, we carry through a comprehensive and systematic examination of creative agriculture through its concept, basic characteristic, significance, development model and general strategy.

Moreover, we have listed creative industries policies from all areas, and 2008 statistics generated from creative industries events and industrial data in the Appendix.

Last but not the least, we hope this *Chinese Creative Industries Report 2009* to be helpful to our readers. We also sincerely hope we offer insights for the state or regional governments in policy-making. Any comment and feedback from related parties are welcome in order to continue the progress of creative industries. In the mean time, we deeply believe that, in the duration of this financial crisis with traditional industries’ downturn, creative industries will fight against the current barriers and lead the whole economy evolve in a positive, healthy and steady fashion.

China Creative Industries Research Center (CIRC), established in July 2005, is subject to Beijing Academy of Science and Technology. By cooperating with experts and scholars of universities and research institutions, CIRC is dedicated to the research in creative industries both in theory and practice of China.

The Creative Publishing Series, as research achievements of CIRC, are composed of 3 parts as the Academic Series, the Case-study Series and the Translation Series, and chief-edited by Professor Zhang Jingcheng who is a Research Fellow of Beijing Academy of Science and Technology and Director of CIRC. The Academic Se-

ries is devoted to publish the annual *Chinese Creative Industries Report* (abbreviated as *Report* and known as *Development of Creative Industries in China 2006/2007/2008*) and take some research subjects from various government departments; the Case-study Series, centred with *Top Creativity—Classical Cases Collection of Chinese Creative Industries*, probes into typical cases in the creative industries according to different categories; the Translation Series mainly introduce foreign classical works of creative industries to Chinese readers.

Hereby, we are pleased to announce that the title of *Development of Creative Industries in China* (Annual Blue Book) is formally transformed into *Chinese Creative Industries Report* by advises and proposals from experts and readers in this field. Up to now, this series have been published for 4 years and the brief introductions of each one are as the following:

Chinese Creative Industries Report 2006 (known as *Development of Creative Industries in China 2006*) makes an approach to the connotation and extension of Chinese creative industries by combining with the national development conditions. moreover, *Report 2006* also describes the practical meaning of developing creative industries in China and makes analysis of some issues and key factors influencing in the process.

Chinese Creative Industries Report 2007 (known as *Development of Creative Industries in China 2007*), on the basis of the national economic census data formally issued in 2006 for the first time, makes an inventory for the scale of creative industry of the nation and regions following the development situation of creative industries in the whole country.

Chinese Creative Industries Report 2008 (known as *Development of Creative Industries in China 2008*), with more mature style and more complete materials, focuses on regions where creative industries has developed Significantly. And a number of renowned scholars and government officers were involved in the compiling with their first hand materials and insightful comments. By systematically viewing creative industries on a scale of the whole country, *Report 2008* has a macroscopic nature and is in a more mature style.

Chinese Creative Industries Report 2009 can be seen in the above.

Up to now, the English version of General Report of *Report 2007*, *Report 2008* and *Report 2009* have been completed, any one interested in them can contact with us for a free copy, either in paper or electronic. Our address is as the following:

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北京文化创意产业充分利用新机遇,继续开拓新的发展空间;细化落实创意产业政策;投融资实践获得新的突破,形成了多层次、全方位的文化创意产业发展格局。奥运会的成功举办,为北京树立了崭新的城市形象,今天的北京沿袭奥运精神,将“科技北京、绿色北京、人文北京”目标融入城市建设,为北京文化创意产业的发展提供良好的空间依托。

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天津加大了可以快速拉动现代服务业的创意产业发展力度。这座曾经拥有“北方最大的工商经济中心城市”头衔,拥有被世人广泛关注的“滨海新区”发展机遇的直辖市,无论从创意产业集聚区、创意产业业态、创意产业社会推动机构等方面的发展,还是政府各相关部门的关注度,都明显在步入发展的快车道……

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持续发展能力强。文化创意产业已成为石家庄新的经济增长点,一个新的支柱型产业已初见端倪。

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哈尔滨既是我国东北部的政治、经济、文化和教育的中心城市,也是承载着多元文化的国际化都市。近年来哈尔滨的创意产业尤其是软件产业、文化艺术产业和会展业增长迅猛,创意产业的发展既依托于哈尔滨市的原有资源和各项政策支持,同时又为这座历史悠久的冰雪名城带来了新的机遇和挑战。

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上海正在以 2010 年世博会的召开为契机,更好更快发展创意产业。2007 年创意产业被上海明确定位为“优先发展”的四大现代服务业之一。上海不仅在国内率先提出并实践着“创意旅游”和“创意农业”的新兴理念,还让创意产业和谐之花遍地开放。

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2008 年,面对世界金融风暴的冲击,南京市的文化创意产业奋力前行,软件等高新技术产业增长迅速,动漫产业稳步推进,演艺产业在改革中开拓市场,影视业实现多元化发展,园区建设和发展势头强劲,产业综合实力不断提升,产业招商再创佳绩,领军园区、高成长企业 and 新锐人物正在形成,全市文化创意产业继续保持着良好的发展态势。

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堪称“文化遗产之都”的苏州市,不仅拥有众多物质和非物质文化遗产项目及其传承人,而且已把传统的苏绣、书画、古典园林建筑发展成现代产业,远销几十个国家和地区。异军突起的电子信息、动漫游戏、影视音像、休闲娱乐等新兴产业,正在以集聚成长的方式重塑姑苏名城繁华之景。

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政策的大力推动下,制造业实现了产品差异化,综合竞争力增强,创意产业近三年以年均 20% 的增幅快速发展,正在成为宁波市产业升级的强大推动力。

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作为民族文化资源富集,面向东南亚、南亚的国际旅游城市,文化旅游、演出演艺、传统民族工艺、茶花产业、休闲娱乐、会展文博、特色饮食、艺术创意成为昆明创意产业发展的主体。创意已渗透到城市发展、文化服务和大众的日常生活之中,营造了这个城市独特的文化创意氛围,也形成了和东部城市不一样的创意产业发展路径与模式。

第十三章 西安:发展文化创意产业,创造新的发展极 (275)

千年古都西安发展文化创意产业优势突出。在政府主导、民间与市场双轮推动下,促进了产业的选择、聚集和布局,形成曲江国家级文化产业示范区等五大板块,通过影视演出、数字传媒出版、网络游戏动漫、会展广告等诸领域的突出带动,西安将成为国内最重要的文化创意产业基地和创意阶层活跃之都,在中国未来的发展中创造新的发展极。

第十四章 台北:呈现新旧多元的创意城市 (299)

作为台湾省文化中心的台北市,2008年创意产业总体上进步很快,除了出版业继续低迷外,多数行业表现相当优异:设计、艺术产业一枝独秀屡获大奖,台制电影“海角七号”创下票房新纪录、两岸创意产业交流也日趋频繁。作为台北市创意产业主管机关的台北市文化局研拟出六项施政要领,推动创意产业新发展。

第十五章 香港:塑造“创意之都”品牌新形象 (325)

在创意产业这一概念还未提出之前,香港特别行政区已经在数码、电影、设计、广告、出版等文化创意产业领域有了不俗的表现。通过研究香港创意产业发展与珠江三角洲的互动关系,反思香港创意产业发展所面临的“边缘化”问题。创意产业的发展将使香港走出经济困境、实现经济转型,也是香港重塑品牌形象,成为亚洲地区“创意之都”的关键。

第十六章 澳门:特色资源助推创意产业起步 (343)

特有的发展历史与地理条件,在给澳门特别行政区的产业发展带来局限的同时,也给澳门的文化创意产业发展提供了特有的资源。如何结合区域资源优势,通过有效的政策引导,在加强澳门历史文化资源保护、促进文化繁荣的同时,推动相关产业的发展,是澳门特区政府制定创意产业相关政策的主要着力点。

第十七章 评析:政策推动创意产业发展 (365)

2008年,各地对创意产业发展都给予了较有力的政策支持,此前尚没有相关政策的城市出台了一些指导性规划和意见,而政策体系相对完善的城市也做了更加细化的安排。相关政策措施推动了各地创意产业的快速发展。但是,现有政策还远不能满足创意产业发展的需要,因此继续研究制定有效的政策措施仍是摆在各级政府面前的紧迫任务。

第十八章 新视点:创意产业发展探索与思考 (379)

创意产业蓬勃发展,理论研究不断创新。从差异化体验入手,再次明确创意产业的本质特征;从经典的经济增长理论出发,提出创意是促进经济增长的

全新生产要素;从金融危机的背景,阐明如何通过扩大国内市场发展文化创意产业;以深圳成为“设计之都”为例,描述全球创意城市网络与创意产业发展的“台一塔”模式;最后聚焦“创意农业”,寻求新农村建设的有效途径,探索中国创意农业产业化战略及发展模式。

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Under the global financial crisis, China's development environment for creative industries hasn't changed whereas features of gradually explicit policy guidance, systematic talent development, continuously frequent industry exchanges, and a rapid growth of certain key sectors have been emerging. Looking into the coming 2009, Chinese creative industries will be facing a year with more opportunities, more capital investment, more convergence with other industries and more distinct characteristics.

Chapter II Beijing: Pulled by the 2008 Olympic Games, policies getting refined, investment and financing system achieving new breakthroughs	(25)
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Beijing proceeded with creating a broader scope of development for creative industries by fully utilizing new opportunities, refining and implementing relative policies, as well as achieving new breakthroughs regarding investment and financing system. An all-dimensional and multi-level development pattern of creative industries has been formed in Beijing. Moreover, the success of the 2008 Olympic Games established a new image for Beijing. Beijing will follow the Olympic spirits, add the objective of "Green Beijing, Hi-tech Beijing, and Cultural Beijing" into its urban construction, and provide a favourable development space for its cultural & creative industries.