

Abstract of Doctoral Thesis

An Experimental Study on the Effects and Impact of Chinese Industry Promotion Policy in the New Cultural Industries : Focusing on Animation and Digital Game Industries

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In recent decades, the Chinese central government has successfully promoted better living by economic growth. In addition for building better spiritual lives, the Chinese central government had established development strategies for cultural industries at “the 16th National Congress of the Communist Party of China” in 2002. After that, central government and local governments have increasingly attention to the cultural industries and have operations in development policies of cultural industries. Especially, animation and digital game industries are rapidly growing. Thanks to commercialization and government support to the animation industries, the number of original animation program made by Chinese companies have been significantly increased. Also digital game industries has been rapidly growing even though government support was not available. Those two industries developed rapidly, however the way of development between them have many different features. For example, animation industries got many preferential political treatment directly from the local government such as subsidies and industry base, but the game industries have to grow up in a perfect competition market. The number of enterprises in digital game industry are larger than anime industry.

The aims of this study is to investigate the effects and impact of Chinese industry promotion policy in the new cultural industries, focusing on animation and digital game industries in China; to clarify problems in current policies; and to suggest an academic approach to solving the problem. For the purpose, this study tried to examine the contents of two industrial policies, and to clarify development circumstance of two industries. In detail, this study carried out an enterprise questionnaire survey, which enterprises are involved in two industries - animation and game, but get different political supports. Comparing the different types of political supports and those sizes, this study analyzed the answer of survey.

In chapter 2, previous researches have been reviewed based on the cluster theory. Considering the content changes of “the 5 Years Plan” which is an important guideline of Chinese economic development and the characteristics of development policies of animation and game industries which addressed by central government and local governments, this study clarified that animation and game industries have an important implication in Chinese economic growth. In promoting the development of cultural industry cluster that includes the animation and digital game industries in China, government involvement is considered to be essential (Hypothesis 1). In addition, not only direct subsidy to the company, but also communication environment improvement is essential in order to improve the productivity and innovation (Hypothesis 2). Two hypotheses were evaluated with the data collected from the questionnaire survey and a semi-structured interview.

Chapter 3 demonstrated that industrial policies have different purposes in two areas - Hangzhou Animation Industry Base and Beijing Zhongguancun Science Park. The former is for supporting enterprises, the latter is for revitalizing a whole industry. Subsequently, introductory analyses on the present situation of animation industry supported by government and digital game industry developed under market system have been conducted.

Chapter 4 analyzed the data of Chinese cultural industry questionnaire survey from Chinese animation companies and game companies by categorizing the characteristics of policies with principal component analysis and by conducting quantitative verification with multiple regression analysis and t-test. The results demonstrated that the industry development and promotion policy gave an overall influence on the development of both industries.

In chapter 5, the data obtained from the fieldwork in 23 companies located in 7 areas in China have been compared. The results show that the companies want to some supporting policies which can facilitate the communication between different companies, especially the development of small and medium-sized enterprises. In this chapter, Hypotheses 2 is reviewed that the supporting policies are effective in realizing communication and innovation.

This study has proved a major point that Chinese cultural industry development policies - Government involvement such as not only economic assistance but also communication environment improvement which is effective in productivity and innovation - are necessary in developing a cultural industry cluster including Chinese animation and digital game industries. However, current commercialization of animation industry is still not enough and its yieldability is lower comparing with game industry. Based on the results, this study suggested three improvement strategies that current policies should be improved toward to strengthening of human resource development policies, reinforcing industry collaboration, and enhancement supporting small and medium-sized enterprises which are vulnerable to competition.