A study on current business performance of Chinese animation industry

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Abstract

As IT infrastructure keeps growing, the digital entertainment, cultural and creative industries including animation and games are becoming global industries that promote communication and exchanges between different cultures, playing an important role in the world economy. In recent years, the creative industries have gown increasingly more important, which have attracted interest from management research. The emergence of Chinese animation practice with government supporting programs and the ever-increasing complexity of internet game have called for better understanding of this indsutry from a specific country perspective. The objectives of this report is to:

- Review the current business performance of Chinese animation industry
- Indentify priority areas as emergying issues
- Suggest areas for future research

Following interviews with a number of marketing practitioners, and review from published documents, this paper introduce key products, market, development trend, drivering forces, and structure of Chinese animation industry. Baced on industrial observation, five overaching prority areas which include clusters, outsourcing, licensing, networking, internationlisation are highlighted. These factors were found predominent in the current stage of Chinese animation industry. In each topic, one case was provided for a better understanding from business practice perspective. In the near future, clusters will remain as a management model and infrastructure support for Chinese animation companies, especially SMEs. More and more outsourcing compaines are looking for ways to upgrade to OEMs which own brand and can develop character business. International collaboration also starts in some large companies in China. For further research and study, some potential areas are also proposed.

Key words: creative industry, Chinese creative industry

1. Executive summary

In recent years, the creative industries have gown increasingly more important, which have attracted interest from management research. The emergence of Chinese animation practice with government supporting programs and the ever-increasing complexity of internet game have called for better understanding of this indsutry from a specific country perspective. The objectives of this report is to:

- Review the current business performance of Chinese animation industry
- Indentify priority areas as emergying issues
- Suggest areas for future research

Following interviews with a number of marketing practitioners, and review from published documents, the report introduce key market, drivers, and structure of Chinese animation industry. Cases are studied to demonstrate business models and strategies from five overaching prority areas:

- Clusters
- Outsourcing
- Licensing
- Networking
- Internationalisation

2. Introduction

2.1 Creative industries and animation

As IT infrastructure keeps growing, the digital entertainment, cultural and creative industries including animation and games are becoming global industries that promote communication and exchanges between different cultures, playing an important role in the world economy (2008-2009 annual report). The phrase creative industries are often defined as those that focus on creating and exploiting intellectual property products; such as music, books, film, and games, or providing business-to-business creative services such as advertising, public relations and direct marketing. (Source: en.wikipeadia.org/wiki/creative_industries). As one of the representatives of creative industry, the animation industry experiences rapid development. In Europe and the U.S., the animation industry becomes one of the pillar industries, worth more than 10 billion USD annually (2008-2009 annual report). Typical products include TV animation, movies and related character products. Game is also animation related industry and share common feature with animation industry, with the products ranging from PC games, console to internet and mobile games.

The growth of animation industry can generally be divided into five phases. Phase One (1910-1930) is the early exploration stage of the technology. Phase Two (1930-1950) is the early development stage for animation movies with the introduction of the first animation movie ‘Snow White’ by the Disney company. The individual frames of a traditionally animated film are photographs of drawings. Phase Three (1950-1970) is the first booming period for animation industry, leading by the Disney company who expanded operations, moving into live-action features, television, and theme parks. Full animation technology was adopted widely, meaning the process of producing high-quality traditionally animated films by regularly using detailed drawings and plausible movement. The European animation industry remained silent after the 2^{nd} world war, whereas in Asia, both Japan and China began the early development of TV series and movies. Phase Four (1970-1990) is the declining stage of Disney animation, and the recovering of European and Japanese animation. Phase Five (1990-) is the second booming stage of animation industry with increasing more cooperation between big companies and the development of new technology. 2D and 3D computer related skills are used in animation movies. Pixar released the first 3D animation 'Toy story'. European and Japanese animation industry kept growing with more globalised co-operation. In China and India, specialised animation studios developed as outsourcing studios collaborating with western and Japanese big companies. To summarise, Figure 1 is a roadmap which indicates the key players, technology and products of each period.

The process of making animation movies (Figure 2) begins with conceptualisation. The production is undertaken by a prime contractor supported by numerous subcontractors in every phases of production. The production process of animation film can be divided into three parts: pre-production, mid-production and post-production. The pre-production stage contains the creation of screenplay, storyboard, visual development, character design, background design, color design, sound design, story reels and workbook. Normally this part is conducted in-house or by joint project. The mid-production stage starts with modeling and rigging, followed by layout, animation, shading and lighting, rending and film recording. Part of it is currently outsourced to animation studios. The post-production stage includes picture process (color correction and final print) and sound process (sound effect and musical score, final sound mixed). This is normally conducted in-house or jointly. For game industry, the production stages include conceptualisation, pre-production, production and release/operation.

Though mostly similar, the Japanese animation industry is driven by the comic industry, where best-selling comic books will be further made to animation TV movies. Toy companies join the animation concepulisation stage and share the investment risk. The comic and animation industry in Japan has long history and complete supply chain. In USA and many European countries, sample movies are made for shows and exhibition, which is an efficient way to attract investment. Charecter business including cosummer goods and theme park consititute the diversity of anmiation industry in USA. In China, comic industry is not profitable, and most animation produce are made for TV shows only. Charecter business developers do not tend to involve in early stage of investment. The process and features of producing anmiation products are drawn in Figure 3.

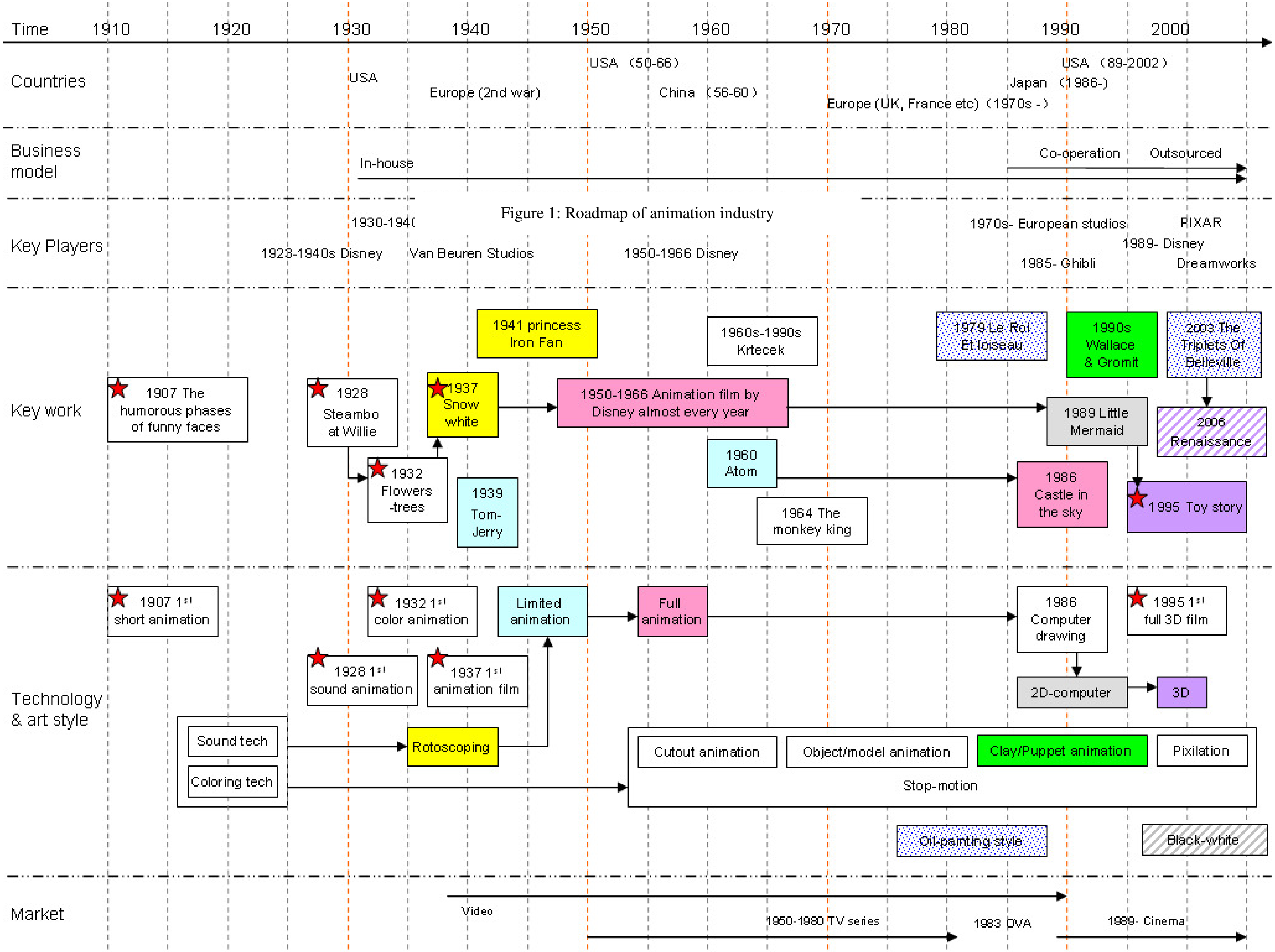

Figure 1: Roadmap of animation industry

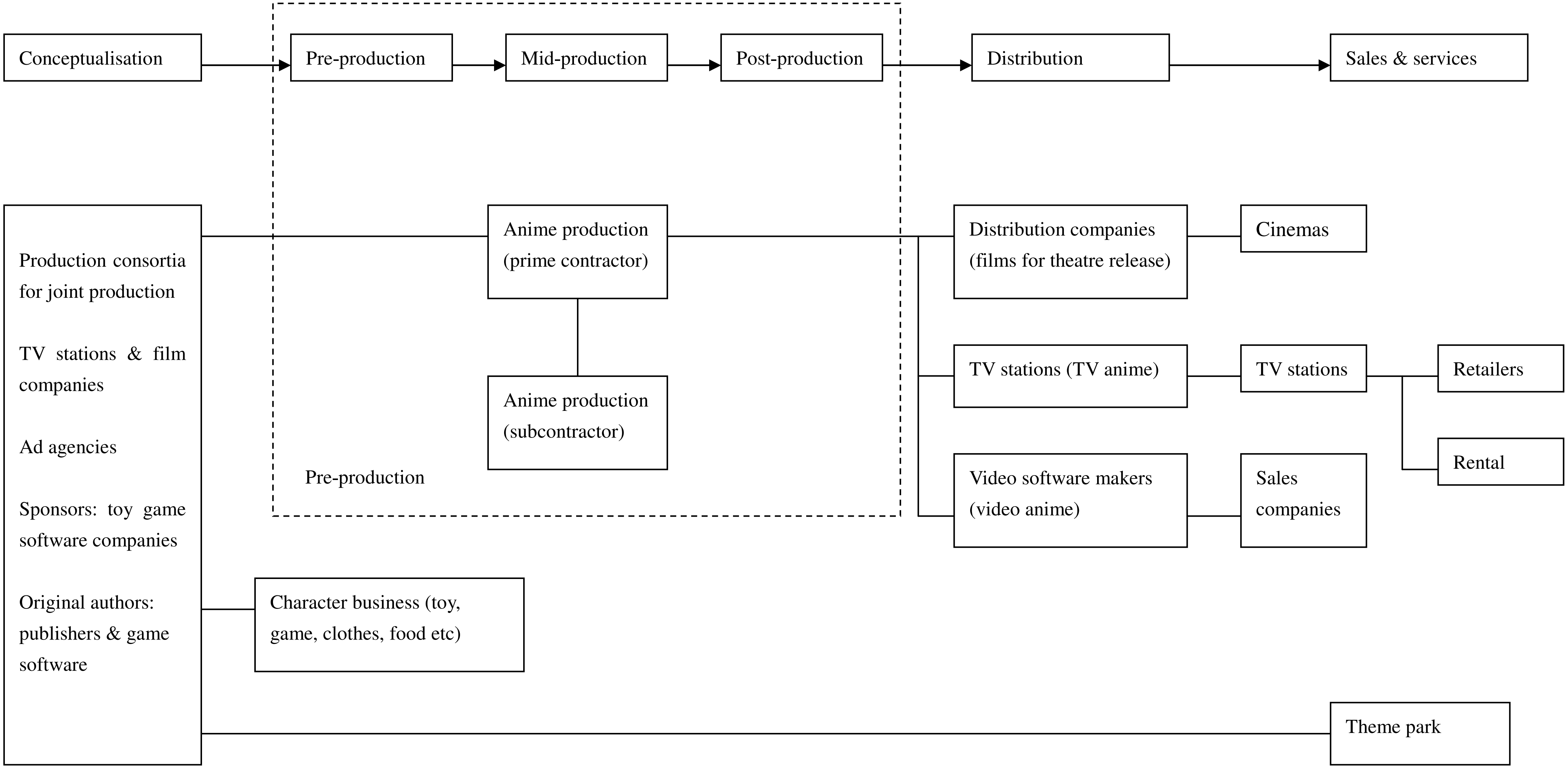

Figure 2: The structure and production process of animation industry

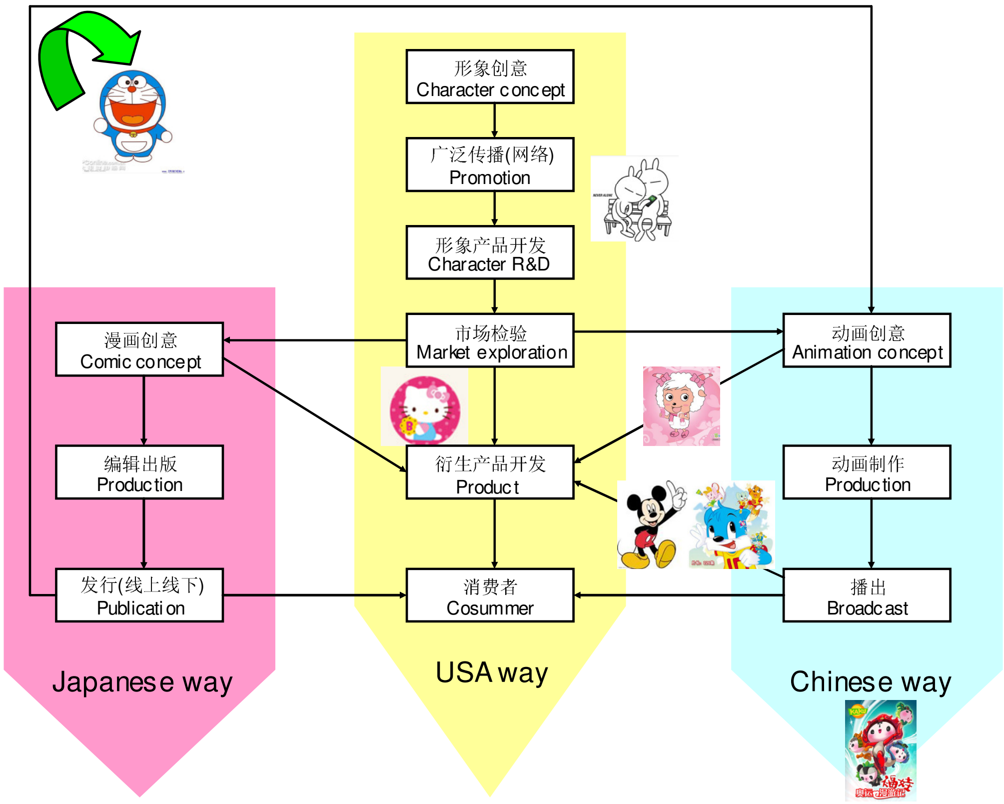

Figure 3: Process of animation industry from country perspective

2.2 Animation industry in China

The Chinese animation industry can be traced back to 1941 when its first movie ‘princess iron fan’ was released. In the 1970s there was a blooming period of Chinese anmiation industry by adopting traditional art styles. However with the Chinese economic reform and open door policy, the previous anmiation companies mostly SOEs face problems of self-financing. In the meanwhile increasingly more overseas foreign animations, especially the Japanese, enter Chinese market with competitively low price and diversity of contents. The domastic animation industry in China declined greatly. Many are trapped by financial problems since there is no long funds from the government to produce animation movies, and turn into a outourced factory producing animations for overseas companies. The capability of creating original animation products become limited in China .

From 2002, the Chinese government realised the importance of preserving national culture through animation industry. A series studies suggest China's tremendous market and its weak creativity, with over 80 percent of profits generated from animation industry trapped into pockets of Japanese and Americans (2008 report). The government decided to promote domastic animation industry. In 2005, Chinese government issued series of policies to support the animation industry. Private enterprises and foreign-funded companies swarmed into the area of animation production and animation industry clusters/bases throughout the country came into being. The total cartoon production for 2004 was only 29,000 minutes, while the market demand was 268,000 minutes, which left a gap of 230,000 minutes. In 2006 Shenzhen Culture Blue Book revealed China's revenue from animation industry hit RMB 11.7 billion, and the cartoon resource becomes more with rapid growth of annual production (Figure 4). In 2007 the industry revenue was more than 200 billion, with the total production was

101,900 minutes. In 2008, another important rule was issued that during the golden hours (5pm to 8pm), overseas animations are forbiden to broadcast on TVs. This policy aimed to encourage the production of domastic products. Additional policy including awards from regional government and clusters, tax and service related issues attracted many SME studios and large companies to expand their business range. By the end of 2008, there were 6463 animation related companies and orgnasations national wide with 4 animation TV stations (Beijing Kaku, Shanghai Xuandong, Hunan Jiying, Guangdong Jiajia) (Figure 5), 34 TV stations for children and 447 universties providing relvent courses. Clusters grow as a base for SMEs to grow and resource for large companies. There are 71 clusters/bases, 44 of which are authorised directly by central government offices (Appedix I), mainly locaded in Beijing, Pearl River Delta, Yangtz River Delta and Hunan province.

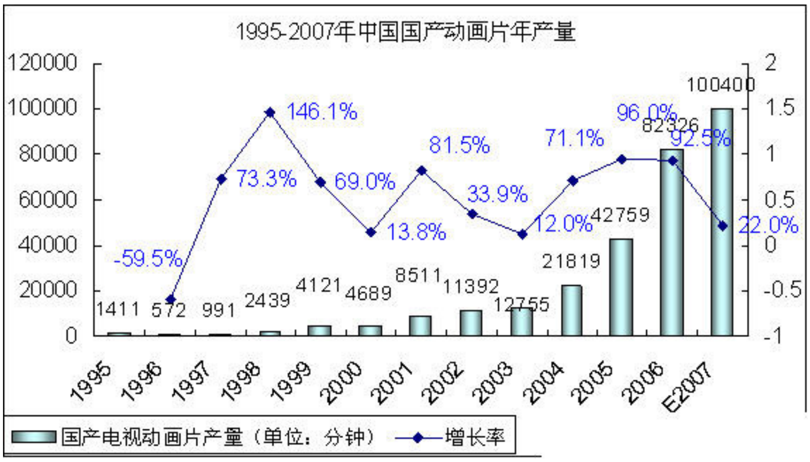

Figure 4: Annual productions of Chinese animation industry

Adapted from 2008 Chinese animiation industry report

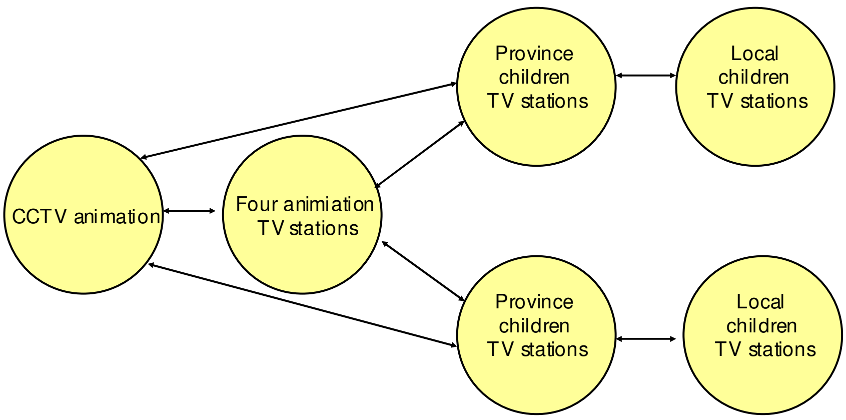

Figure 5: Chinese animation TV stations

Besides governent policy, animation products have large market space in China. In the past five years there was increasingly market demand in China for anmiation products including movies, TVs, mobile games and internet games. In 2005, the annual sales of children audio & video publication reached RMB 10 billion. The demand and market scale are increasing (Figure 6). The market for game espectily online game and mobile game is huge. This is because of the broadband development in China, with tens of millions of new participants joining the internet world every year (Pew Internet Report, 2007). From 2004 to 2006, the internet population in China grew at double digit rates, rising from 18% in 2004 to 23% in 2006. As of 2007, China had a total of 137 million internet users, with more than 70% them under the age of 30 (So, 2008). The country also established itself as the world's largest mobile market with about 565 million users in 2007. In 2006 the scale of online animation was 10 million RMB, and it is expected to be 100 million RMB in 2010. Online game had more than 33 million users in 2006, and increased by 61.5% year after. The industry now launches more than 200 game titles to the market annually. Due to internet piracy, major global game companies such as Sony, Nintendo and Microsoft have kept away from the Chinese market (The Economist, 2008). The absence of console game players has led to the rise of online games in China. Ubisoft, Electronic Arts, and Vivendi are the three foreign companies that have entered China by either engaging in mergers and acquisitions or joint ventures with local game companies. In 2007, 65% of China's online game market belonged to Chinese local software producers. The current industry structure shows that there are two tiers of local game companies (Chung and Yuan,2009): first tier and second tier. Large-scale Chinese companies such as The9, Shanda and NetEase are the first tier companies, occupying seventy percent of total martket share (Figure 8) (Koo and Waide, 2006). Second tier corporations includes very specialised companies who serve as distributors or portal operators, or produce local MMORPGs (Massive Multiplayer Online Role Playing Game) and casual games. Mobile animation and game is another profitable area in the industry with more than 10.800 billion RMB in 2007 (Figure 9).

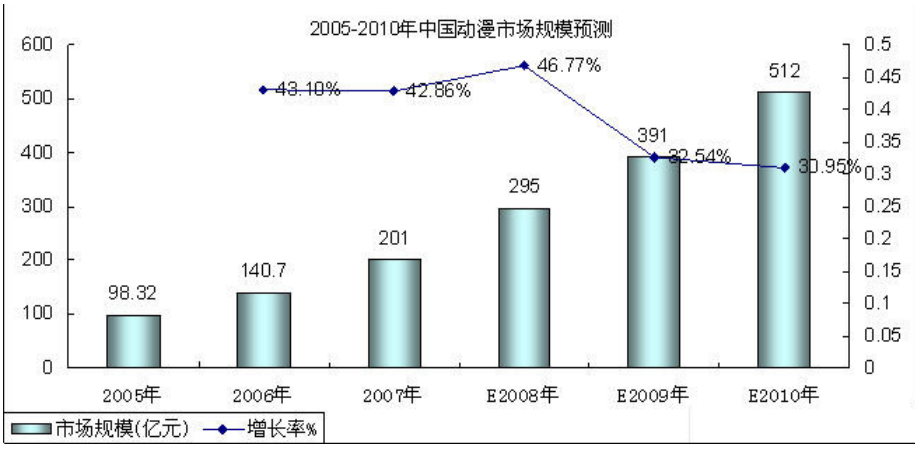

Figure 6: Market demand for Chinese animation industry

Adapted from 2008 Chinese animiation industry report

Figure 7: Market demand for online animation in China

Adapted from 2008 Chinese animiation industry report

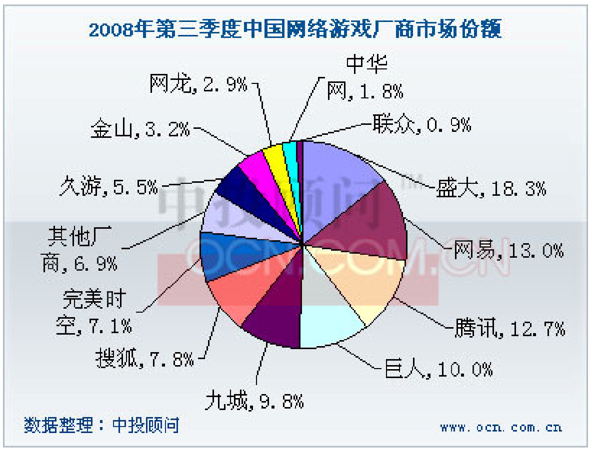

Figure 8: Market share of major Chinese local online game companies

Adapted from 2008 Chinese animiation industry report

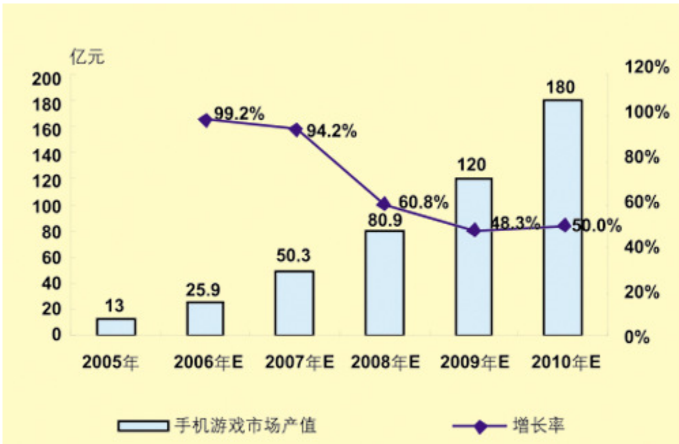

Figure 9: Market demand of mobile game in China

Adapted from 2008 Chinese animiation industry report

The structure of Chinese animation industry can be preseanted as Figure 10. The focal company is the developer who design concept and product animation movies or games. The production part can be outsourced to specilised studios who do graph design, anmiation, sound design and testing. Many of these companies collaborat and co-evolute in industry park and clusters, which are supported by government policy. The operator level is the downstream of focal developer companies, which contains TV houses, cinemas, DVD/book publishers, internet and mobile platforms (including game operators), and character manfacturers. In China, the most active players are focal company, outsourcing studios, industry parks, TV houses and operators.

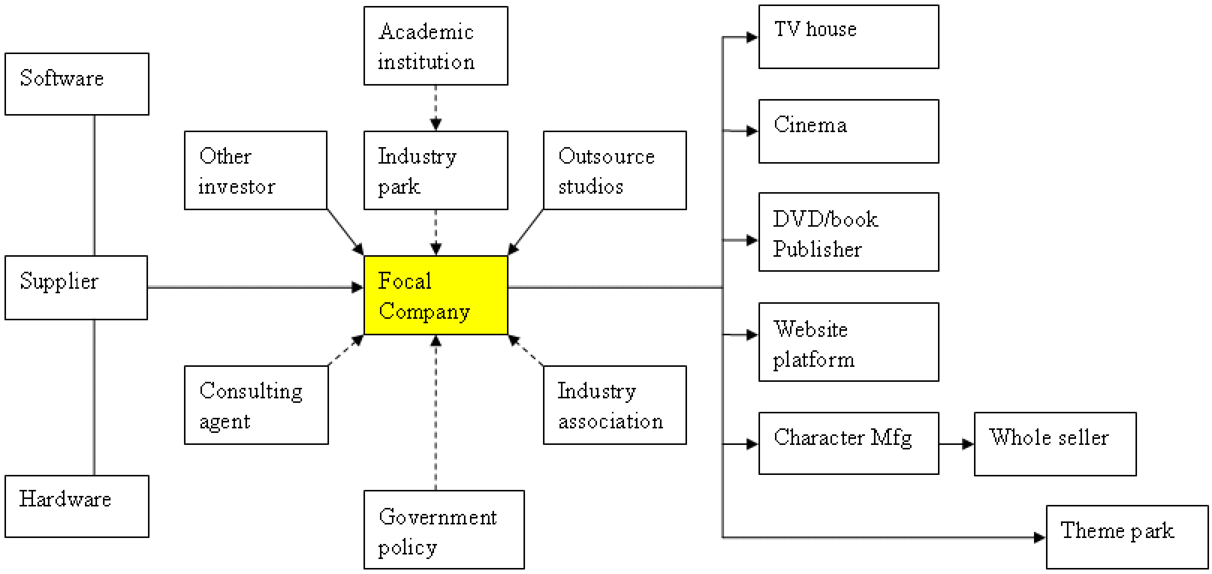

Figure 10: Structure of Chinese animation industry

3. Method

The themes detailed below were generated from an analysis of interview data with executives/directors and document reviews from 38 companies (see Appedix II). The selection has covered four active areas of animiation industry in China – Pearl River Delta, Yangzi River Delta, Beijing, and Hunan province. Companies include animation studios, game developers, game operators, TV houses, clusters, hardware supplier, universities and industry associations. Interview questions cover company business model, growth strategy, and issues in inter-firm collaboration. Five pressing themes emerged for further discussion.

- Clusters
- Outsourcing
- Licensing
- Networking
- Internationalisation

4. Emergent themes

4.1 Clusters

A industry cluster is a geographic concentration of interconnected businesses, suppliers, and associated institutions in a particular field. The animation industry cluster is a unique feature in China. Although not directly funded by government, they are originally enouraged by the central and regional government to let anmiation companies gather together, share resources and co-evolute. Six types of clusters can be seen in Table 1. Case One is a typical cluster for SMEs.

Table 1: Type of anmiation industry clusters

Type of cluster	Feature	Location and exmaple
Comprehensive	A diverse enviornment animation related companies including movie maker, game developer, services and training schools	Shanghai
SMEs training	A platform for SMEs to share informaiton, collaborate and co-evolution	Shenzhen, Changzhou
Public service	A service platform which providing technology and industry solutions	Wuxi
Leading firms	Cluster led by large firms who develop orignial anmiation concept	Hunan
Software/tech	Cluster aiming to develop animation related software and techology	Suzhou
Education	Train and educate people to be animation expertise	Beijing, Changchun, Hangzhou

Adapted from 2008 Chinese animiation industry report

<u>Case One: a national cartoon & animation industry base</u>

Located in Shenzhen City, this industry base is one of the state-level animation bases certificated by the State Administration of Radio, Film and Television. It is a cultural industry base with focus on cartoon, animation and internet games. Supported by the strong resources from Shenzhen Media Group, the base has offered all-around services for all registered 60 companies with infrastructure and administration system. With the integration of different companies (including IT, diginal content, orniginality, agency, media, communication service platforms) and establishment of centres (infrastrature, communication, training, production, venture, IT capital, policy, PTP), the core business of the base is (see Figure 11):

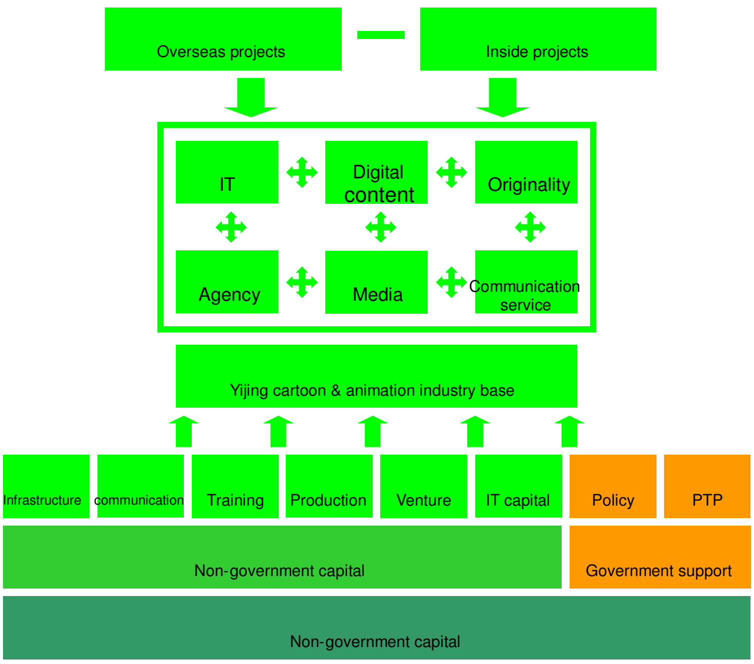

Figure 11: Business model of a Shenzhen-based animation industry base

- By introducing advanced facilities from countries and regions with developed animation industry, introducing human resources training agencies and introducing Chinese animation companies with original

product, it aims to make those Chinese companies produce more excellent original animation and cartoon products;
- By building up a collaborative network for Chinese TV channels specialized for children, it aims to realise large-scale sales in Chinese market for original animation and cartoon products manufactured in its base;
- By introducing overseas sales agencies, it aims to explore greater overseas markets.

The registered companies benefit from special polices on technologies, capital, finance, and tax. For example, the reduced or free rental, interest-free loan, and offering of Shenzhen permanent residence. Up to now, 51 leading companies in the animation and cartoon industry have entered the base, which include 44 Chinese companies and 7 overseas companies. Among them, there are planning companies for original animation, cartoon and games, manufacture companies for original animation and cartoons, R & D companies for applied technologies, programme agency, overseas financing companies, publication and distribution companies, and distribution agencies, which form an integrated industry chain. All the companies in have their original products. In 2006， the animation production capability of the base is about 14,000 minutes. There are 26 original movie and TV animations in producing in 2007. It also has established the cartoon, animation & games Industry training centre, and has close cooperation relationship with universities.

4.2 Outsourcing

Outsourcing is a typicl business model in anmiation industy due to the globalisation of industry and price competition. From 1980s, Chinese animation began to produce for overseas developers. In the past 20 years 90% of Chinese animation are outsourcing studios. Though orignianl design capability grows, in 2006 there are still 70% firms in China which do purely overseas project or jointed production (2008 animation report). In game game production, art and sound are the most common areas for outsourcing, following by animation, and testing. Case Two shows a good practice of such firms.

Case Two: an Chinese outsourcing studio

Established in 1999, this company is a Nanjing-based outsourcing company delivering high quality 3D art and animation to the global interactive industry. It is specialised in 3D art and animation production. With 240 full-time employees and is growing rapidly, they are able to produce:

- Concepts
- In-game 3D models for character, objects and environments etc.
- Textre creation
- Animation
- Cinematic movie and special effects
- Flash Game Development
- iPhone Game Development

The company has very clear goal which is to product art and animiation for game developers. Because the competition for outsourced studio is fierce, it develop several practice to attract clients especially top game developers globally.

- Develop product of high quality by investing high-end software and providing training to upgrade employ knowlege and skills
- Establise IP protection structures containing both hardware (isolation of project teams) and software (IP protecting database, control of emails). This is one of the base for trust from western partners
- Enhance company competitve advantage from developing 3D anmiation to CG and concept design. Based on existing collaborated project, it can further expand the project range with high value added activities.
- Attending global conference to form network

So far it has long-term relationship with 10 world top game developers including Sony, E.A. The quality management, IP protection system, and technique expertise are its core competence to securie the relationship and establish good reputation.

4.3 Licensing

Licensing is a high value-added practice in animaiton industry supply chain. Licensing business begins in the western world like Disney, and followed by Japan and South Korea, among which animation related profit constittute 44% (Figure 12). Children stationary products, foods, beverage, cloths are the most popular lisencing sectors. It is only recently that most Chinese anmiation companies realise that more than 2/3 profit of animation comes from licensing. However how to manage the brand and how to license effectively are the challenges companies face right now.

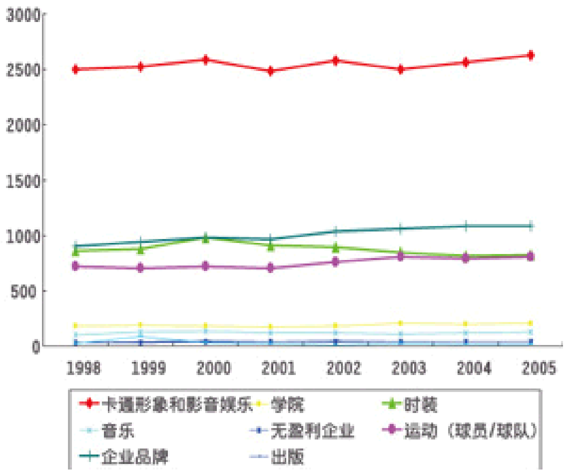

Figure 12: Liensing business sector

<u>Case Three: a character busniess and licensing company</u>

Since estabished in 1999, this company aimed to develop anmiation and expand its brand across diverse sectors. It is among the earliest Chinese companies that realised the potiental value of licensing and enter the market early. While producing its original animation TVs series and broadcast it on TVs, it made every effort to expand the brand. From 2002 it began to collaborate with manufacturers, and gradually developed more than 600 product types including drinks, stantionery and toys. However the company was too eager to expand the business to cover the big amount of money of making anmiation TV series. By collaborating with as many manufacturers as possible, there was lack of the design style, price standardisation and quality management. In this way, problems happened such as price competition, quality failure and distrust between the company and retailers. The company spent lots of time and money on toy marketing, control and managing retailers, establishing subsidary as sales agency, and therefore there is few effort focusing on its key competitive advantage – design and making of anmiation TV programs. The decline of the quality and creativity of its anmiation eventually break the image of its toy products.

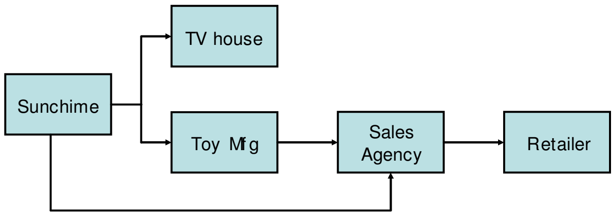

Figure 13: Licensing and chracter business model

The case of this company (Figure 13) suggested a potential business model of licensing in animation industry, and nurture the whole supply chain. The negative part of its experience also gives further lessons as how to systematically manage brands, aiming at different market, how to control the quality and IP issues, how to allocate the resouces, and how to collaborate with partners effectively.

4.4 Networking

The development of TV houses, especially anmiation focused channels needs networking with a variety of anmiation related companies. For example, Shanghai Toonmax TV holds an animation festival annually to promote the creative idea from public. Case four company also has a system of network collaboration.

<u>Case Four: a TV house company</u>

This company is one of the four anmiation specilised TV stations in China. Based in Beijing, it was established in 2007 with the broadcasting range covering Beijing, PRD, YRD of 3.9 billion people. Its focused audience are children between 4-14 years old. Kaku itself has 30 people who mainly do R&D and marketing. The products are either proposed by itself and outsourced to production studios, or bought directly outside. In this way it forms a network of collaborated companines from the resource of BTV and through contacting companies directly. Some small studio are also partners with the company.

Figure 14: model of a TV house company

The competitive advantage of the company is not on a certain animation product, but for the recoganition of its whole supply chain. It has expand the business of brand protection, character busienss, toy sales, and theme park by building up different partners, investing into the areas of production, toy development and children oriented programs (Figure 14).

The 11'x 100 Cartoon Serial Fuwa's Olympic Travel is a good example to show how efficiently the company works as a collaborated network. The project was originally proposed by the Olymic committee, and they selected this company to lead the project. When it received the project, it was 2.5 years ahead of Beijing Olymipic. In order to release the products as soon as possible, it operate in the following way:

- In conceptutilisation and pre-production stage, get experts (play writing, character design) outside involves. These expertises are personal friends with Kaku director.
- Make samples as soon as possible, and ask two different types of studio to do it – one traditional hand-paint, one 2D computer drawing.
- Use the 2D computer drawing sample as benchmark to find 5 outsourcing companies. 4 of them have network and previous collaborative experience. 1 comes to the company directly, and show full passion of doing the project with qualified drawing skill.
- Use 3D layout for stadium to save time and be accurate. This result in the collaboration with Crystal CG who are authorised by the Olympic committee to design the stadium e-model, and has the pictures in hand.
- The mid-production begins along with pre-production, which means companies already start production without the whole play written. By doing so, time is saved. Also directors get feedback and experience, which can be used for the rest of production.
- Co-operation between producers/directors and company producers/directors
- Awarding system to encourage companies do quickly and of high quality.
- The production plan and timeline is totally controlled. Computer-based technology save lots of time for mid-production.
- Invite firm stars as sound cast during post-production. Because they know the importance of Olympic and want to show public image, everything is done efficiently.

Table 2 shows a comparison of traditional in-house production model with the company model by collaboration. By running network closely and collobarative under a clear common goal, the project is done successfully within 1.5 years.

Table 2: Comparison of in-house model and Kaku model

	Conceptulisation	Pre-production	Mid-production	Post-production	Publish etc.
In-house model	6 months	N/A	3-4 years	1 month	N/A
Collaborated model	3 months	- 3 months - 2 samples	- 1 year - 6 2D companies - 1 3D companies	1 month	Mid-production

4.5 Internationalisation

For most of Chinese animation companies, how to upgrade from outsourcing studios to OEM, and to enter overseas market is a big challenge. Very few have began the internationalisation practice. For example, by getting experiences from international outsourcing, Fantasia learnt the European animation art style and enriched its design capablility, which eventually let them create anmiation movies tailored for French market. Joint project with Japanese firms also proved to be successful in the case of CCTV anmiation. Another example can be seen from the growth of Case Five company.

Case Five: a way to be internationlised

Since its establishment in 1995, this company has been helping its clients to with applying 3D visualization technology to creative solutions. From establishment, it focus on using advanced 3D softwards and developing network with clients from differenct industrial sectors. It has now entered into a new era and expanded into such sectors as digital entertainment, culture and education with over 2000 employees. The early stage of the company was to involve in computing effect projects of TV documentary such as 300 episodes 'Olympic ABC' (with China Central TV); 'Imperial Palace', 'New Silk Road', and 'Rise of Nations' .

The 3D computing graph technique together with a great passion of participating helped it win the Beijing Olympics project. The eight years of cooperation with the Olympics was a major contributor to the company's rapid and great growth. In 2008 the digital show in Beijing Olympics openning ceremony made the company known to the world. Its creative design with high quality attracted many overseas clients. Bearing in mind a strong belief of constantly pursuing excellence, it continued to strive for its leading position in the CG industry, by improving both the technology and service, and following higher standards. In China, it set up subsidaries in Shanghai, Hong Kong, and Nanjing, collaborating with local clients from local government, real estate developers and big conference organiser.

The collaborating with overseas companies including the application of multimedia technology and digital films to help manufacturing enterprises present products, and project companies to present properties With the growth of project, it began to establish subsidaries in Dubai, Tokyo and recently in London. Because of the experience in Beijing Olymic project, the company demonstrated high quality and talent in 3D design, which let them join the London Olymic project. Now the office in London has 50 employees from both China and UK. Besides project level 3D effect, it is now joining with a UK animation TV producing, and expand business to more sectors of creative media industry.

5. Conclusion

This report presented a governal picture of animation industry in China by providing its key products, development trend, driving forces, and business models. From document and practice review, five emergying issues were discussed, which include clusters, outsourcing, licensing, networking, internationlisation. These factors were found predominent in the current stage of Chinese animation industry. In each topic, one case was provided for a better understanding from business practice perspective. In the near future, clusters will remain as a management model and infrastructure support for Chinese animation companies, especially SMEs. More and more outsourcing compaines are looking for ways to upgrade to OEMs which own brand and can develop character business. International collaboration also starts in some large companies in China.

For further research and study, some potential areas are proposed:

- How is Chinese animation industry practice different from western and Japanese way?
- How to reposition and upgrade from outsourcing studio to OEM?
- How to reposition and upgrade from character manufacturer to OEM?
- How to license and develope brand successfully?
- How to develop trust between collabrated partners in internatioal animation products?

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Appendix I: Animation clusters in China

23 个广电总局授牌基地

	基地位置	授牌时间	类型	主管单位	承办单位
北京	中国电影集团	2004-12-6	企业型		
	中央电视台中国国际电视总公司	2004-12-6	企业型		
	中国传媒大学	2004-12-6	教育基地		
	北京电影学院	2004-12-6	教育基地		
上海	炫动卡通卫视传媒娱乐有限公司	2004-12-6	企业型		
	上海美术电影制片厂	2004-12-6	企业型		
湖南	湖南金鹰卡通有限公司	2004-12-6	企业型		
	三辰卡通集团	2004-12-6	企业型		
江苏	常州国家高新技术产业开发区软件园	2004-12-6	园区型	常州市政府	常州市广电局（政府）
	苏州工业园区国际科技园	2005-6-1	园区型		
	无锡太湖数码动画影视创业园	2005-6-1	园区型	无锡广电集团、无锡新区、滨湖两区政府	无锡市广电局（政府）
	南京软件园	2007-9-2	园区型		
浙江	杭州高新技术开发区动画产业园	2004-12-6	园区型	高新区（滨江）党委、管委会、政府	
	中国美术学院	2004-12-6	教育基地		
	浙江大学	2007-8-15	教育基地		
	浙江传媒学院	2007-8-15	教育基地		
广东	南方动画节目联合制作中心	2004-12-6	企业型		前为广东爱威文化发展有限公司，现为广州市达力影视文化传播有限公司
	深圳市罗湖区（深圳怡景国家动漫产业基地）	2005-5-19	企业型	深圳广播电影电视集团	
湖北	江通动画股份有限公司	2005-6-1	企业型		
辽宁	大连高新园区动画产业园	2005-6-1	园区型		
吉林	长影集团有限责任公司	2005-6-1	企业型		
	吉林艺术学院	2005-12-6	教育基地		
重庆	重庆南岸区茶园新区	2007-8-15	园区型		

10 个新闻出版总署授牌基地

<table>
<tr><td></td><td colspan="2">基地位置</td><td>授牌时间</td><td>类型</td><td>主管单位</td><td>承办单位</td></tr>
<tr><td>四川</td><td colspan="2">成都高新区数字娱乐软件园</td><td>2005-4-26</td><td>园区型</td><td>成都高新区政府</td><td>园区管委会（协会）</td></tr>
<tr><td rowspan="4">广东</td><td colspan="2">广州天河软件园</td><td>2005-8-18`</td><td>园区型</td><td rowspan="4">市国家网络游戏动漫产业发展基地建设领导小组</td><td rowspan="4">市新闻出版和广播电视局（政府）</td></tr>
<tr><td colspan="2">黄埔园区（广州国际玩具礼品城）</td><td>2005-10-28</td><td>企业型</td></tr>
<tr><td colspan="2">番禺天安科技节能园</td><td>2007-2-12</td><td>园区型</td></tr>
<tr><td colspan="2">越秀园区</td><td>2007-7-15</td><td>园区型</td></tr>
<tr><td>上海</td><td colspan="2">上海张江高科技园区</td><td>2005-11-9</td><td>园区型</td><td>上海市政府</td><td>文新集团和上海张江（集团）</td></tr>
<tr><td rowspan="3">北京</td><td rowspan="3">中关村科技园</td><td>石景山园</td><td>2006-5-31</td><td>园区型</td><td>石景山区政府</td><td>北京领步科技（公司）</td></tr>
<tr><td>海淀园</td><td>2006-5-31</td><td>园区型</td><td>海淀区政府</td><td>园区管委会（协会）</td></tr>
<tr><td>雍和园</td><td>2006-5-31</td><td>园区型</td><td>东城区政府</td><td>园区管委会（协会）</td></tr>
<tr><td>河北</td><td colspan="2">石家庄市动漫产业发展基地</td><td>2007-6-13</td><td>城市型</td><td>石家庄市政府</td><td>动漫产业领导小组（政府）</td></tr>
<tr><td>辽宁</td><td colspan="2">沈阳浑南新区（国家动漫产业发展基地）</td><td>2007-6-29</td><td>园区型</td><td>沈阳市政府</td><td>浑南动漫产业办（协会）</td></tr>
<tr><td rowspan="2">山东</td><td colspan="2">青岛市国家动漫创意产业基地园区和人才培养与研发基地</td><td>2007-9-15</td><td>园区型+教育基地</td><td>青岛市委宣传部</td><td>青岛慧谷软件园、青岛科技街、青岛创业园、青岛科技大学传播学院、青岛农业大学传媒学院、新未来文化产业人才培训学校、市北区劳动就业培训中心和青岛本色高级设计培训中心</td></tr>
<tr><td colspan="2">烟台芝罘区（国家动漫产业发展基地）</td><td>2007-12-12</td><td>园区型</td><td>烟台市政府</td><td></td></tr>
<tr><td rowspan="2">安徽</td><td colspan="2">合肥市高新技术开发区（国家动漫产业发展基地）</td><td>2007-11-30</td><td>园区型</td><td>合肥市政府</td><td></td></tr>
<tr><td colspan="2">芜湖软件园（国家动漫产业发展基地）</td><td>2007-12-1</td><td>园区型</td><td>芜湖市政府</td><td></td></tr>
</table>

5 个文化部授牌基地

	基地位置	授牌时间	类型	主管单位	承办单位
上海	华东师范大学	2004-7-27	企业型		上海宽视网络电视有限公司、华东师范大学
辽宁	大连高新园区	2006-8-7	园区型	高新园区科技发展中心和大连软件园股份有限公司	大连动漫游产业基地开发有限公司
湖南	长沙市高新区麓谷园区	2006-12-22	园区型	长沙市政府	
四川	成都高新区天府软件园	2006-12-29	园区型	四川省文化厅	基地办公室（公司）
江苏	无锡新区	2007-2	园区型	无锡新区政府	基地办公室（协会）

6 个科技部授牌基地

	基地名称（位置）	授牌时间	类型	方向
北京	北京大兴新媒体产业基地	2005-12-31	园区型	
	国家数字媒体技术产业化基地（石景山区）	2005-5	园区型	建立无纸动漫公共技术服务平台
山东	青岛市南软件产业基地（青岛慧谷软件园）	2004-12-31	园区型	
成都	国家数字媒体技术产业化（四川成都）基地	2005-6	园区型	搭建“网络游戏引擎研制”、“网络游戏测评”等平台
上海	国家数字媒体技术产业化（上海长宁）基地	2005-5	园区型	建立动漫和影视基地主题园
长沙	国家数字媒体技术产业化（湖南长沙）基地	2005-5	园区型	以卡通动画为主要特色

Appendix II: Participated companies for this study

Participated companies for study

Location	Company name	Type of Business	Interviewee
Hong Kong	Hong Kong City University	Accademia	Research/teaching fellow
Hong Kong	Activision Blizzard	Game developer/publisher	Senior director
Hong Kong	Imagi	Animation	Document review
Hong Kong	Opus	Game developer	Marketing director
Shenzhen	Toonring	Animation	General manager/producer
Shenzhen	Shenzhen Yijing Animation	Cluster	Director
Shenzhen	Original Force	Animation	Document review
Shenzhen	Animate China	Animation	Licensing manager
Shanghai	Shanghai Academy of Social Sciences	Accademia	Research fellow
Shanghai	Toonmax TV	TV house	Marketing department supervisor
Shanghai	Shanghai Zhangjiang Animation	Cluster	Marketing director, Vice president
Shanghai	Shanghai Animation Film Studio	Animation	Document review
Shanghai	Fantasia	Animation	Document review
Shanghai	Youth	Animation	Art director
Shanghai	Great Dreams	Animation	Sales manager
Shanghai	Shanda	Game developer/operator	Marketing director
Shanghai	Mystone	Game developer	Document review
Shanghai	Zhixian	Animation	General manager
Nanjing	Nanjing Ditigal	Cluster	Director
Nanjing	Crystal CG	Animation	Vice general manager
Nanjing	Winning Music	Music studio	Art director
Nanjing	Orignial Force	Animation	COO
Hangzhou	China Mobile	Mobile platform	Product manager
Hangzhou	Kangde Software	Animation	General manager
Changsha	Sunchime	Animation	Document review
Wuhan	Jiang Toon	Animation	Document review
Beijing	CCIF	Association	CEO
Beijing	CCTV	TV house	Marketing director, product manager
Beijing	Kaku BTV	TV house	Vice president
Beijing	Crystal CG	Animation	Total director
Beijing	Glorious	Animation	General manager
Beijing	Sanshan Digitao	Animation	Art director, COO
Beijing	Qimingxing	Animation	General manager
Beijing	Sohu	Internet platform	Product manager
Beijing	Wanmei	Game developer/operator	Project manager
Beijing	The 9th City	Game operator	Marketing director
Beijing	Mgame	Game developer	Product manager
Beijing	Hanwang	Hardware supplier	Product manager