

China report: Sichuan TV Festival and International 'Gold Panda' Awards, November 2011

First anniversary of CCTV-9 Documentary Channel launch

Report by Chris Oliver

The **2011 (and 11th) Sichuan TV Festival, International 'Gold Panda' Awards and Television Market** in Chengdu is now a major event on the Chinese television calendar. Jointly hosted by the State Administration of Radio, Film and Television (SARFT) and Sichuan Provincial People's Government it has become a comprehensive international event for both cultural and television business communication. The Sichuan Province – the home of the adorable panda – has gone through major reconstruction since the 2008 Wenchuan earthquake and the theme for this year's festival was Peace, Friendship, Exchange and Cooperation. It was an ideal opportunity for the Chinese television industry to consolidate relationships and communicate with the rest of the world, particularly as it approached the first anniversary of the CCTV-9 Documentary Channel launch on 1 January 2012.

The Organising Committee and Chairs comprised He Daxin (Director General of Sichuan Radio, Film & Television Bureau), Chen Hua (President of the Sichuan Radio & Television Network) and Luo Ming (Editor in Chief and Vice President of CCTV).

Numerous events were held during the November festival in Chengdu. They included the Television Market over three days, Television Industry Forums, judging of the International 'Gold Panda' Awards, including documentary, animation and student awards. This was capped off by a final awards ceremony and broadcast of the awards. A total of 3,918 entries were submitted from 71 countries. The number of entries and countries set a new record. While Chinese entries dominated the numbers in all categories, it was disappointing to note the small number of entries from Australia.

International 'Gold Panda' Awards

The International 'Gold Panda' Awards for documentary was a highlight of the festival with over 900 documentary entries in the three categories – Anthropology, Society and Nature & Environment. There were approximately 400 entries in the Society category, 300 in Anthropology and over 200 in Nature & Environment. Undoubtedly Chinese entries have strengthened in quality each year, with a large focus on Anthropology and equally represented in the other two categories with foreign entries. The awards

within each category included the Grand Jury Prize and Best Long Documentary, plus a number of craft awards such as Best Photography. Being shortlisted or winning a category at the International 'Gold Panda' Awards enables a program to be viewed by a large number of Chinese television executives, producers and international judges – and can only help a producer's entry into the Chinese market.

Australian documentaries were shortlisted in five categories: *Kangaroo Mob*, 360 Degree Films (Category – Special Jury Award), *The Worm Hunters*, Gulliver Media (Category – Most Innovative), *Penguin Island*, 360 Degree Films (Category – Best Director, Nature & Environment), *Underground Art*, World Is My Home Film Production (Category – Short Films, Society), *On a Wing and a Prayer*, Sea Dog TV International Pty Ltd (Category – Nature & Environment). Director/producer Sally Ingleton (360 Degree Films) won a Gold Panda Award for Best Direction for *Penguin Island*.

Events, guests and judges

Typical of past years a number of international organisations such as the NFB Canada and Brazil had half-day country events planned where they introduced their organisations and countries to the Chinese industry including a number of documentary screenings. Georges Leclere and Banff World Media Festival have actively assisted the festival to inform producers about the event. International guests and judges included Rosa Crescente (CEO of Capia Productions and Director of MIDIATIVA [Brazilian Media Centre for Children & Adolescents] formerly from TV Cultura and Discovery Kids Latin America), Steve Burns (ex National Geographic Executive), Yukihiro Amagi (former Vice President of NHK Enterprises), Georges Leciere (President of LGMA Inc and closely linked to Banff World Media Festival), Marie-Dominique Bonmariage (Assistant Director of the French Program at the National Film Board of Canada), Chris Oliver (Screen Australia) and many others.

Chinese judges included some of China's highly regarded documentary television executives and members of the Chinese Television Artists Association (CTAA), including Liu Xiaoli (President of the Documentary Committee of CTAA), Liu Jinghai (ex Shanghai TV Executive and Professor of Shanghai University), Wu Baowen (President of Sichuan Radio & Television Academy), Liu Wen (Managing Director CCTV Documentary Channel), Zhou Yan (Deputy Managing Director of the CCTV Documentary Channel), and Sun Jianying, a well-known documentary producer who has many roles in the documentary industry in China including Director of the International 'Gold Panda' Awards since 2001.

Following on from the broadcast of both the Student and Industry awards, the Television Market in Hall 2 of the Convention Centre opened with great fanfare, pomp and ceremony. Most of the market stands were held by Chinese broadcasters (including CCTV and Beijing Television Station), sales companies, provincial governments and some educational institutions. However, this year it was much larger than in previous years.

A key event was the one-day Documentary Forum hosted by the CCTV Documentary Channel. Chinese and international guests participated, debating a number of issues also relevant to the Australian television industry, such as terms of trade, the quantity of domestic versus international

content, what appeals to Chinese audiences and marketing your program to the international marketplace.

CCTV-9 Documentary Channel

Documentary production in China is at the forefront of the television agenda with the introduction of the new CCTV-9 Documentary Channel and the recent 'blue'¹ position paper *China Documentary Film Development & Research Report* by Zhongguo Jilupian and Fazhan Yanjiu Baogao with research from 2009 and 2010, released during the Sichuan market at 45RMB a copy. This is an extensive and important document of some 250 pages which, along with material published by the CCTV Documentary Channel, lays the groundwork for future documentary production in China and the ways that the broadcast and domestic industry will engage internationally (see attached *Mandarin Executive Summary of China Documentary Film Development & Research Report* and Appendix B: *Brief Introduction to the CCTV Documentary Channel*).

The CCTV Documentary Channel is undoubtedly opening up its broadcast platform to the industry, both domestically and internationally. Its Managing Director is highly regarded director/producer Liu Wen, who now has over 70 staff in the Channel. He's supported by an excellent management team including Deputy Managing Directors Mr Shi Yan and Ms Zhou Yan, Mr Tian Yuan (Head of International Acquisitions & Cooperation) and Ms Han Wen (Producer/Planning Section). Based on discussions with the channel and published papers available at the market, the intention is to establish industry-wide standards, including processes on subject selection, form, technique and pricing for the channel; and to gradually shape a unified, open and orderly documentary market, with a view to laying a solid foundation for documentary production.

The type of deals that the CCTV Documentary Channel has completed in the marketplace give the impression that they are tending to work with larger companies in the international marketplace. Companies that have a reasonable level of output in terms of hours and have the capital to trigger project development quickly. Acquisitions of standout completed one-offs or documentary series with content that fits the channel schedule (eg nature) are definitely being made.

CCTV-9 Documentary Channel programming

CCTV-9 programs currently being broadcast are organised in four main categories namely Nature, History and Biography, Archives and Contemporary Topics with eight main time slots, and 24/7 transmission. The broadcast schedule for the CCTV-9 Documentary Channel has been published in both English and Mandarin. Programs are commissioned and acquired from the domestic market or acquired and co-financed with the international marketplace.

The current schedule looks like this:

18:00 Top Selection, duration 1 hr: The best Chinese documentaries.
19:00 Kaleidoscope, duration 1 hr: Documentaries from around the world.
20:00 Humanities and Geography, duration 30 mins: Nature, geography. Science and educational programs.

¹ 'Blue' means number one report.

20:30 Portrait of Current Real Life, duration 30 mins: Real-life stories in contemporary China.

21:00 Outlook, duration 1 hr: Documentaries (nature) from around the world.

22:00 Special Edition, duration 1 hr: Award-winning domestic documentaries.

23:00 Road to Discovery, duration 30 mins: Archaeology and discovery topics.

23:30 History Legend, duration 30 mins: Historical accounts.

CCTV Documentary Channel has two editions, a Chinese Edition (domestic edition) and an English Edition (international edition), which are broadcast separately and reach maximum coverage.

The domestic edition is bundled with CCTV-3, CCTV-5, CCTV-6, CCTV-S. CCTV-News and CCTV-Children cover the whole country and are broadcast to Asia and the Pacific via satellite reaching 900 million people.

The international edition will cover overseas viewers with satellite global coverage together with CCTV-International (Chinese), CCTV-News and other international channels in The Great Wall Package. It is carried on three satellites with multi-lingual programming and can be received on six platforms in Europe, Asia and America.

CCTV-9 deals and International Consultants

On the production front Liu Wen and his team at the CCTV-9 Documentary Channel have been busy over the last year. At the Television Market launch of their programs they announced co-production and acquisition deals with substantial players – National Geographic, BBC Worldwide and ITV. Disappointingly there were few Australians present. Experienced producer Larry Zetlin (Gulliver Media) and well-known Australian executive Augustus Dulgaro, who is charge of the ITV Asian division, were walking the floor.

Additionally, the Documentary Channel announced a number of Honorary International Consultants to the channel to assist them in bridging the gap between themselves and other international documentary production industries – they included Steve Burns (USA), Rosa Crescente (Brazil), Yukihiro Amagi (NHK Japan), Georges Leclerc (Banff World Media Festival, Canada) and Chris Oliver (Screen Australia).

Documentary content focusing on Australia

While 2010/11 was the Year of Australian Culture in China promoting cultural exchange between the two countries and there are ever increasing and substantial numbers of Chinese spending their holidays in Australia, according to Chris Oliver's sources many Chinese know little about Australia. The CCTV Documentary Channel has indicated that they are keen to develop and co-produce programs as we celebrate our 40th anniversary of diplomatic relationships with China. They have produced programs focusing on other countries that provide a broad perspective and are similarly keen to do an extensive series on Australia. A program such as this would probably focus on Australia's natural environment, unique local culture, Indigenous culture, modern civilisation and aim to give a Chinese audience a view of Australia's past and present.

Outlook for Chinese TV market and relationship between China and Australia

The International 'Gold Panda' Awards is one of most influential and authoritative international awards ceremonies in China and Asia and has attracted wide attention. The number of entrant countries and quality entries has set a new record and is a testament to their regard. Undoubtedly the Chinese documentary arena is entering a new stage of healthy development – a new era of engagement with larger broadcaster and capital investments.

What is evident is that Chinese producers and broadcasters are signing arrangements with key factual players, such as National Geographic, the BBC and ITV. Hopefully the invitation extended to the management of CCTV Documentary Channel and the Beijing Television Station, will result in them attending the Australian International Documentary Conference (AIDC) from 27 February to 1 March 2012 in Adelaide. This will provide an opportunity for Australian producers to exchange ideas with potential partners.

In addition to the above, visits and events have taken or will take place between China and Australia. These include the visit of Mr Mao Yu (Deputy Director, Film Bureau SARFT) to Australia in December to meet with Government officials and Bob Connolly and Sophie Raymond's attendance at the Beijing Film Academy (with *Mrs Carey's Concert*). There will be a Chinese Television Association delegation visit to Australia in February, as well as Chinese producers, directors and actors attending the 2012 Golden Koala Chinese Film Festival in Sydney and Melbourne during the second week of February 2012. Mario Andreacchio is President of the International Jury at the festival. The Shanghai International Film Festival (SIFF), Beijing International Film Festival (BIFF) and Beijing Film Academy (iDOCS event) are other current or upcoming annual events that will undoubtedly consolidate the relationship between China and Australia.

Chris Oliver
January 2012

APPENDIX A:

2011 (11th) Sichuan TV Festival International 'Gold Panda' Awards for Documentary Judging Committee

Chairmen:

He Daxin

Vice Chairman and Secretary General of Organisation Committee of Sichuan TV Festival
Director-General of Sichuan Radio, Film and Television Bureau

Chen Hua

Vice Chairman and Deputy Secretary General of Organisation Committee of Sichuan TV Festival
President of Sichuan Radio and Television

Luo Ming

Editor-in-Chief, Vice President of China Central Television

Vice Chairmen:

Jiang Dongsheng

Member of Sichuan TV Festival Organisation Committee
Vice Director-General of Sichuan Radio, Film and Television Bureau

Zhong Xuzhao

Director of Sichuan TV Festival Office
Vice President of Sichuan Radio and Television

Zhang Ning

Director of Programming Office of China Central Television

Committee Members:

Cheng Chaoyang

Deputy Director of Sichuan TV Festival Office
Vice President and Deputy Chief Editor of Sichuan Radio and Television

Ji Xiaoquan

Deputy Director of Sichuan TV Festival Office
Assistant President of Sichuan Radio and Television

Cao Gang

Deputy Director of Sichuan TV Festival Office
Assistant President of Sichuan Radio and Television

Feng Mei

Director of Publicity Management Department of Sichuan Radio, Film, and Television Bureau

Sun Jianying

Director of SCTVF International 'Gold Panda' Awards Office

Liu Wen

Managing Director of CCTV Documentary Channel

Zhou Yan

Deputy Managing Director of CCTV Documentary Channel

Shi Yan

Deputy Managing Director of CCTV Documentary Channel

TRAVEL REPORT

APPENDIX B:



Brief Introduction to the CCTV Documentary Channel

CCTV Documentary Channel launched on 1 January 2011. It's the first national documentary channel with nationwide coverage in China. CCTV Documentary Channel displays the unique value of documentaries in authentically showcasing the history and the reality. With vivid visual language and international broadcast voice, it intends to overcome cultural barriers and win the universal psychological identification and emotional resonance of the audience.

CCTV Documentary Channel mainly covers four categories: **nature, history and humanities, society and historical files**. The channel timetable alters with 30 min and 60 min programs with eight main themes. The channel broadcasts 24 hours a day with 4 hours of new programs every day, including 1 hour of overseas imported documentary. The total length of premiere programs amounts to **1,600 hours** a year, and the overall duration of overseas imported documentaries is around **400 hours** yearly.

CCTV Documentary Channel covers the whole of China and some parts of Asia Pacific via satellite to reach **900 million** people.

Means of cooperation

- 1) Program Purchasing: CCTV Documentary Channel purchases 400 hours of overseas imported documentaries yearly.
- 2) Program Exchange: two sides exchange a number of programs, and broadcast respectively on each other's platform within a certain period of time.
- 3) Co-production: co-determine the topics and details of programs, assign production teams to control program quality, and negotiate on copyright related issues.
- 4) Commission: for topics of common interest, participate in investment based on actual conditions, and negotiate on copyright related issues according to the proportion of investment.
- 5) Training and Exchange Programs: arrange training programs with internationally renowned media, and also invite documentary filmmakers, producers and media experts with industry experience to China for seminars and other exchange activities.

More means of cooperation are more than welcome.

Cooperation intentions

We have already reached preliminary cooperation intentions with various overseas institutions and production companies, such as BBC, ITV, KBS, NHK, National Geographic Channel and RAI.

✧ Projects include:

- a) Documentary *Tiankeng – China's Hidden Landscape* (co-production by CCTV and ITV)
- b) Documentary *Himalayan Gold Rush* (co-production by CCTV and Kwanza)
- c) Documentary series on China and Korea's 20th anniversary of normalisation of diplomatic ties (co-production by CCTV and KBS)
- d) Documentary series *Matteo Ricci* (international version by CCTV and RAI)
- e) Campus Road Shows to Peking University and Communication University of China (CCTV and BBC)
- f) Program Exchange with NHK.

Major ongoing projects:

Tea, A World-changing Leaf

52 mins x 6 episodes

As one of the three main non-alcoholic beverages in the world, tea holds both international and cultural values of human civilisations. This documentary series explores how Chinese tea had spread all over the world, and it explains the interactive communication of Chinese culture and world culture. It reveals the history and enlightens the future. The series is an original and pioneering work in both academia and the media world. The series tells a story from the aspects of history, culture, economics and international politics. The international view and cross-discipline method of research has made it a magnificent story of tea.

Tea is an age-old topic, which is favoured by many documentaries. The main focus of the tea series is about change. From the history of tea, we have chosen six important moments including the origin of tea, the east spreading of tea, the encounter of tea with Russia, Britain and the US. Tea has changed the east in the agricultural civilisation era, and has changed the world later on. Along with the process of globalisation, tea returned to its origin: the art of lifestyle, a beverage of human souls and the nature.

The Gardens (TBA)

52 mins x 8 episodes

The legends of sacred gardens exist in both eastern and western cultures, with examples of the sacred lady's Jade Pool, Garden of Eden, Pure Land, Muslim Jannat and The Hanging Gardens of Babylon. Have those gardens ever existed? Or are they only the description of idealised gardens in people's minds? Why do sacred gardens exist in different cultures? This

documentary series also emphasises the roles of gardens in people's daily lives, and it is about the aesthetic aspects of gardens.

The series makes use of the most advanced techniques, such as Holographic image restoration, 3D animation restoration and miniature landscape restoration, to rediscover the long-lost gardens. The film also showcases Chinese traditional aesthetic standards.

Unknown Lands of China (first season)

52 mins x 6 episodes

There are two layers of hidden meaning with the word 'unknown'. One is about remote areas that are untouched by modern civilisations. In these areas, we could really hear the voices of our ancestors. One hundred years ago, the population of China was 300 million. The population is now over 1.3 billion. China, though, still has some remote lands, which are mentioned as Paradise by the travellers. Those places hold the secrets that outsiders never know. The other meaning is about nature's wonders. There are seas, peaks, caves, deserts, glaciers, wetlands and underground forests. There are people living there that follow the laws of nature. With the help of advanced technology, people get to know more about these magical places.

This series takes us to the most remote and discrete regions in China. The long shooting period is to ensure the audience that they could get a close-up view of those secret places. This gives the audience the impression of a true, beautiful and fascinating China. The first season is about Puruogangri Glacier, Yellow River's estuary, Taklamakan Desert, the bottom of Thousand Island Lake, Three Parallel Rivers and Great Sinkhole.

Tasty China (TBA)

52 mins x 7 episodes

Chinese cuisine is getting more familiar and favoured by people all over the world. Food is simply the best way to get to know China. Through Chinese food, the audience will have a tasty insight of this oriental country. Through the exquisite cinematography and the relaxed pace of the film, the audience will get an overview of the history of Chinese food, Chinese cooking experiences, different eating customs, unique aesthetics perspectives toward food and the wisdom of oriental lifestyle.

These episodes feature the crucial elements of Chinese daily cooking in which the ritual, ethics and many other aspects in Chinese culture are explored. This series provides a context within which Chinese food, Chinese culture and history are examined.

Maritime Silk Route

From the east coast of Asia to the east coast of Africa there lies an ancient sea route, which has been called the Maritime Silk Route. This route linked the four great civilisations in ancient times. Now, with the camera, we have an opportunity to travel along this ancient route and to rediscover the countries and places. From the Pacific Ocean to the Mediterranean and the Middle East to Africa, the film explores the important port cities and countries. The film is focused on specific people, unique places of interest and local customs. The main purpose of the film is to show the audience the culture and economic communication between China and the countries along the Route.

Introduction of production teams

CCTV's best documentary production teams make up the core of CCTV Documentary Channel. In recent years, they have successfully launched: *Forbidden City, Rediscovering the Yangtze River, Rise of the Great Nations, Forest China, The Ten Years of Hong Kong, The Ten Years of Macau, Dunhuang, The Power of Corporations* and *Summer Palace*.

In pursuit of high quality, high standard and high level, Documentary Channel will mobilise documentary teams across the country and vigorously foster new generations of professional talent; it will establish long-term and diversified communication and cooperation with global institutions on TV documentary production and broadcast, and yield world class and professional documentaries with professional teams.



国家广电总局社科重点课题
中国纪录片发展现状与对策研究成果

中国纪录片 发展研究报告

中国纪录片蓝皮书

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纪录片是一种具有跨文化、跨时空的传播属性的媒介形态，担负着纪录社会、国家形象传播、国际文化交流和历史文化解释权等重要使命，关系到国家文化战略。新时期以来，纪录片成为中国电视的标志性成就，从《话说长江》、《望长城》到中央电视台《东方时空 生活空间》，引导了中国电视的人文精神和美学潮流。不过，2000年以来，随着电视栏目化改造和以收视率为核心的评估体系确立，卫星电视频道变成了电视剧和娱乐节目的竞技场，纪录片被迫进入栏目化生存，甚至一度连生存都成为悬疑问题。就在中国纪录片进入发展低谷的同时，国际纪录片发展迎来了黄金十年，电影大片迭出，以《华氏911》、《无法回避的绝望真相》、《海豚湾》为代表的美国社会纪录片和以《迁徙的鸟》、《帝企鹅日记》、《海洋》为代表的法国自然纪录片在全球引起剧烈反响；电视纪录片也进入高速发展时期，美国探索频道在185个国家落地，全年收入37.7亿美元，收视人次达到15亿，英国BBC、日本NHK和法德联合的Arte都在持续推出精品，如《蓝色星球》、《生命力》、《海洋》等。

2010年，中国纪录片开始了转折性变化，其标志便是广电总局印发的《关于加快纪录片产业发展的若干意见》。作为政府机构，国家广电总局显然认识到纪录片的独特价值以及当下处境，中国纪录片市场疲软，电视化生存维艰，海外纪录片的巨大引进量和不断重播已经严重压抑了中国国产纪录片的生存空间。因此，文件要求，广电部门将对引进海外纪录片实行总量控制，各级电视播出机构每天播出国产纪录片与引进纪录片比例不得低于7比3。同时，国产纪录片将安排在黄金时间播出。按照广电总局金德龙司长的说法，中国将再开设三到五家卫星和地面纪录片频道，拉动中国纪录片市场。

应该说，《关于加快纪录片产业发展的若干意见》为中国纪录片发

展提供了政策保障。不过，纪录片发展不仅关系到政策，也关系到运营机制、制作模式、传播模式、行业管理等诸多问题。中国纪录片正在面临一次深刻的转型。

1. 中国纪录片发展格局

按照纪录片的**功能、制作模式和美学特征**等元素，中国纪录片可以分为**宣教型、消费型和审美型**三种类型：

宣教型：审片人纪录片，机构出资，按照机构要求制作，完成宣传意图。

审美型：制作人纪录片，个人自助或机构资助，按照自己的愿望完成艺术表达。

消费型：制片人纪录片，商业投资或机构投资，按照市场的需求完成大众文化工业产品。

表 1 中国纪录片类型图

	功能	资金来源	目的	把关人	成功标志
宣教型	宣传/推介功能	机构出资	宣传需要	审片人	审片人/出资人满意
审美型	审美功能	机构资助、自助	艺术创作	制作人	专家、业内人士满意，获奖
消费型	市场需求	商业/机构投资	受众消费	制片人	收视率/用户/销售业绩

这三种不同类型的纪录片在制作理念、制作模式、传播模式与传播效果上各不相同，宣教型纪录片主要为了满足意识形态功能，审美型纪录片主要为了满足文化或美学功能，而消费型纪录片则是为了满足大众文化市场。

从本质上说，纪录片具有跨文化、跨时空的传播属性，而实现这一属性需要满足四个基本要素：普世的价值观，高品质，模式化生产方式，具有品牌价值。而消费型纪录片最符合纪录片的这一属性。

为了迎合最广范围的受众，消费型纪录片在价值观上与主流社会保持一致，而模式化生产方式保证了品牌价值——不会因制作人员的变化而发生风格变迁。因为市场化生存，艺术/技术品质与制作流程的控制变得格外严厉，对于受众心理与文化思潮的变化也格外敏感，并且敢于采用一切可能调动受众心理的表现手法——它决不冒犯主流受众的心理

防线，但也决不守旧、固执，谨小慎微。为了保持品质——艺术品质与技术品质，必须投入与品质匹配的资金以满足制作要求。因此，纪录片的回收不是靠一次性播出，而是需要在一个足够大的空间和足够长的时间里多层次实现。

消费型纪录片并不仅仅是工业产品，也承载主流价值观与文化品质，保留对重大历史人物、事件的解释权，但以市场的方式发挥功能，因为市场决定影响力。消费型纪录片将主流价值、文化品质与商业价值整合为相互支持的意义传播系统。

中国纪录片的市场格局同样分为三个不同类型。

1.1 意识形态市场

意识形态市场最大的投资主体是政府机构，不受消费型纪录片工业化生产模式资金和周期的限制。为了达到国家意识形态教化的目的，斥巨资打造应时的宣教型纪录片。其目的是社会效益和意识形态宣传，而不以经济效益最大化为目标。纪录片作为国家形象宣传和文化软实力构建的重要手段，历来在世界各国极受重视。在中国，意识形态市场占据了纪录片制作和播出的相当大份额，它以是否实现了国家意识形态传播为衡量标准。宣教片集制作和播出于一体，自产自销。近年来，不少宣教片在获得良好社会效益的同时，也能够通过广告、音像发行等渠道回收资金，取得可观的经济效益。

1.2 大众消费市场

大众消费市场的主体是大型国有纪录片制作基地和民营纪录片公司。它们将回收的资金投入再生产，并通过社会渠道融资，整合优质资源，采取工业化标准化的生产模式，制作具有普世价值观、能够迎合最广范围受众的消费型纪录片，满足大众对文化的消费需求。这部分市场以收视率、票房、版权销售、广告等获得的资金回报为衡量标准。

1.3 小众审美市场

在小众审美市场中，创作者处于中心地位，自己出资或者寻求机构赞助，没有栏目化对风格的要求，不需要考虑生产周期限制，可以十年磨一剑，目的是满足创作者艺术创造的意图，以是否实现了创作者独立

的艺术表达愿望为目标。这部分市场在目前的中国纪录片市场中十分狭窄，它们的传播大多依靠参加国际电影节获奖赢得口碑，极少数能够获得非营利性组织资助，或者由制作发行公司加以改编进入消费型市场，市场消费份额极为低下。

以上三种主要的市场类型都具有单一明确的市场功能定位，但同时也可以兼顾另外两种市场功能的实现。例如，意识形态市场虽然不以经济效益为目的，但是也出现了一批具有较高审美价值、能够拉动相当大的市场消费的宣教型作品，如文献纪录片《邓小平》也取得巨大市场效益；小众审美市场中也时常出现一些黑马，既能得到电影节大奖的厚爱，也能获得市场发行的青睐，例如 2009 年的香港小成本电影《音乐人生》；大众消费市场中也不乏一批具有较高审美价值，传递健康的主流价值观，间接实现意识形态传播的高品质纪录片。

2. 世界纪录片发展格局

近年来，国际纪录片发展迅速。政府在纪录片发展中扮演了重要角色，尤其是英国、法国、德国、日本等国家。上至政策鼓励，下至资金辅助，纪录片不论从制作到播出都在获得越来越多的关注，成为国家文化战略的组成部分。

英国和日本采用公共广播体系，公共服务意念是其共同的特征，收视费是其收入的主要来源，对公共服务原则的信奉以及对文化遗产的促进一直以来都凌驾在广播“自由市场”的需要之上。英国纪录片目前的播放平台主要是三家大广播公司：英国广播公司（BBC）、独立电视（ITV1）和四频道（Channel 4），BBC 是公共广播体系的代表，近年来制作的《蓝色星球》、《生命》等大片影响巨大。日本 NHK 也是公共广播体系，致力于公共服务，制作了《人类文化遗产》、《生命力量》等大片，在世界范围具有良好的口碑。

法国纪录片得力于国家政策的支持，其创作数量和资金投入都处于领先地位。法国平均每年生产 2000 小时的纪录片，其中社会问题占 55%，环境与自然题材占 22%，历史与科学占 17%，而文化与音乐占 6%。这些影片 100% 由独立机构制作，没有内部制作。在法国有 500 家独立制作公司，其中 50 家为大公司。2009 年法国纪录片总投资 3.451 亿欧元，资金投入上除了金额庞大，其筹资渠道也相当丰富。法国国家

电影中心（CNC）负责影视法令规章之草拟与辅助包括纪录片在内的影视制作、发行与放映。其辅助方式有自动性辅助及选择性辅助两种。自动性辅助是借由上一部电影的收入，刺激下一部电影的制作，以刺激量的生产，选择性辅助是针对具有独立制片精神及艺术原创性的影片给予支持，以确保质的水平。2009 年 CNC 投入纪录片制作 6680 万欧元。此外，电视机构也会为纪录片提供资金。

表 2 2009 年法国国家电影中心（CNC）支持各种类型影片情况

类型	制作量 (小时)	总预算 (百万欧)	广播公司投入 (百万欧)	CNC 投入 (百万欧)
故事片	752	664.9	493.4	71.7
纪录片	2225	345.1	163.1	66.8
动画片	351	211.1	58.8	35.3
Live shows	486	75.7	25.0	19.8
文化节目	435	34.5	23.9	4.7
总计	4249	1331.3	764.1	198.3

除了电视播出平台外，每年总有一些法国纪录电影进入商业院线发行，而一些专门放映纪录片的私人电影院也为法国纪录片提供了广阔的放映空间。2009 年，法国影院首轮播放的纪录片数量 71 部，达到了 10 年来最高，此前平均每年 50 部。在所有类型的首播影片中，纪录片占到了 12.1%。30 部纪录电影被批准获得制作资金，其中 27 部为法国本土制作，平均每部 113 万欧元。近年来，《迁徙的鸟》、《是与有》、《帝企鹅日记》、《海洋》等纪录电影都取得了电影票房的成功，也为法国电影赢得了口碑。

在加拿大，一些纪录片项目还未开始前，就拿到 20% 上下的退税，有的甚至超过 45%。早年由英国纪录片大师格里尔逊帮助建立的国家电影委员会（NFB），作为加拿大的公众电影制片人和发行商，多年来一直支持纪录片创作，为世界提供看待加拿大的独特视角。而德国的纪录片产量约占总电影产量的五分之一，都是源于政府的各种支持。德国纪录片协会（AG DOK）代理着近千部纪录片，为创作者提供咨询、交易的平台，2010 年德国纪录片投资多达 5 亿欧元。在澳大利亚，政府除了直接的资金辅助外，还有减税政策。澳大利亚电影委员会是主要的

辅导机构，其服务范围包括低成本制作、新手导演、纪录片、短片、卡通片、实验片。澳大利亚金融公司是联邦政府很重要的代办处，专门提供资金给影视制作，每年度预算约为一千万到两千万美元，辅导对象多以跨国合作计划为主。新加坡政府对纪录片也制定了专门的辅导政策。新加坡经济发展局（Economic Development Board）在税收、金融和政府基金上对影视制作进行扶植。独立的节目制作公司积极与美国探索频道等国际著名媒体合作，接受政府的全额投资。时长大约为1小时的影片政府投资额度为2万坡币（10万元人民币左右）。几乎所有国际顶级卫星频道都在新加坡建立了分支机构，成为这些国际机构的亚洲区域总部，也推动了新加坡纪录片的良性发展。2010年韩国影院上映纪录片共29部，其中韩国本土的纪录片多达22部。

美国既有PBS这样的公共广播公司，也有探索公司、国家地理频道和历史频道这样的商业频道，但商业频道占据了市场主流。2010年，美国探索公司比2009年增长9%，收入高达37.7亿美元。美国纪录电影市场也比较活跃，近年来，《华氏911》、《超码的我》、《海豚湾》、《蠢蛋搞怪秀》等都获得巨大票房成功，也在世界范围发生了剧烈影响。

3. 中国纪录片发展面临的主要问题

《2009年中国纪录片发展研究报告》指出“中国纪录片发展所面临的不是局部问题，而是系统问题：从运营体制、制作模式到传播模式的全链条。”并提出：第一，传播平台无力支撑纪录片的生存空间与品牌传播。第二，产业链不完整，运营机制缺乏动力体系。第三，市场主流产品类型不完善，缺乏品牌产品。

2010年，随着《关于加快纪录片产业发展的若干意见》发布，中国纪录片发展环境明显改善，中央电视台纪录频道的开播解决了面向国际国内的高端传播平台，打开了市场空间，并被赋予了纪录片市场引擎的重要使命，拉动中国纪录片国际化、产业化。不过这一目标何时实现还需要时间的检验。

从目前情况看，中国纪录片发展的主要问题在于：

第一、市场主流品牌产品尚未成型，品牌类型较为单薄。

中国纪录片数量众多，但是缺乏真正意义上的市场产品，更谈不上

主流产品类型，全球品牌尚未形成，本土品牌比较单一，文化传播力与产业拉动力急需提升。

中国纪录片市场产品有三种基本类型：电视栏目纪录片、作为特别节目播出的电视纪录片和电影纪录片。根据《2010 年中国纪录片发展研究报告》的不完全统计，2010 年中国纪录片通过电视传播或院线放映的节目总时长约 9500 小时，其中电视栏目是中国纪录片规模最大的传播平台。2010 年中国纪录片电视栏目首播总时长约 13219 小时，去除不同电视台重复播出的栏目，总时长约为 9343 小时；作为特别节目播出的电视系列纪录片 28 部，约 137 小时；进入院线放映的纪录电影 13 部，约 20 小时。以上电视纪录片数据是指纪录片专业频道和卫视频道纪录片栏目播出的纪录片，其余纪录片节目不在统计之列。

根据纪录片的来源，中国纪录片市场产品可分为三种类型：中国自制纪录片、购买国外素材译制包装纪录片（外购包装）、国外供片商直接供片三类。其中中国自制纪录片占约总数的 71%，外购包装的纪录片约占总数的 22.6%，国外供片商直接供应的纪录片约占总数的 6.4%。需要说明的是，从传播学角度看，中国自制纪录片虽然数量占绝对优势，但大多是地面频道的一次性传播。外购包装的纪录片与国外供片商直接供应的纪录片虽然只占 30% 的份额，符合文件中规定的比例，但引进纪录片传播层次多、范围广、频率高，影响力远远超越数量的比例。

从目前纪录片生产基地看，除中央电视台、上海电视台、中央新影集团外，大多规模偏小，资金、技术、人才都比较弱势，市场空间狭小，多数处于维持状态，无力进行品牌化生产。中央电视台、上海电视台、中央新影集团等实力雄厚的制作基地在国内处于优势地位，具备了品牌创造的基础，并已经获得了一定的成果，但可以进入国际市场的品牌产品微乎其微，并且缺乏品牌所应该具有的稳定性；面向国内市场的品牌产品多数还属于本土制作，而且类型比较单调，无法满足日益丰富的频道和栏目播出需求。

总体来看，主流产品类型尚未形成，产品类型与层次不够丰富，品牌建构仍在进行之中。

第二、市场动力微弱，资本运作不畅，产业链不完整。

产业链不完整，运营机制缺乏动力体系仍是中国纪录片产业必须面对的主要问题。

近年来,中国纪录片被迫转入栏目化生存,作品数量、规模和影响力都急剧萎缩,资金运转不畅。从产业角度看,任何产品只有通过最终消费才能实现价值,产业链形成的动因在于通过资本运作实现产业价值和增值,创造产业价值最大化,体现“ $1+1>2$ ”的价值增值效应。但是,目前纪录片运营主体模糊,制播一体,公司化尚未落到实处,市场交易几乎处于单边状态,回收仅仅是播出所交换的广告。除了赞助之外,社会资本几乎无法介入,当下的运营模式没有为资本预留赢利空间。因此,纪录片产业化需要市场运营机制这台发动机。

最后、纪录片行业标准混乱,低端制作与无效传播的恶性循环仍在继续。

作为一个行业,纪录片缺乏基本的标准——从技术、艺术、投资、交易到评估,无论获奖或者收视率都缺乏足够的说服力。因为市场机制的薄弱,价格与价值的偏离依然严重,由此形成低端制作与无效传播的恶性循环仍在继续。如何打破恶性循环,进入良性运转体系,从而建立切实可行的行业标准,这是中国纪录片发展必须面对的问题。

4. 文件与中国纪录片发展对策

国家广电总局《关于加快纪录片产业发展的若干意见》为中国纪录片发展提供了纲领性文件,具体到战略规划和发展对策,编者认为应该在以下几个层面推进:

第一,制定中长期纪录片发展规划,建立公平的市场格局。

应该按照文件的要求,从文化发展战略高度制订纪录片发展中长期战略规划,对于目前和今后设立的纪录频道进行定位,实行海外传播和国内传播的分类管理,建构公平的竞争机制,拉动纪录片市场。

第二,落实纪录片产业保护政策,建立市场运营体制。

尽快出台政策引导民间资本进入纪录片产业,并按照文化创意产业给予纪录片企业一定政策和税收的优惠。实行制播分离,建立以资本为动力的运营机制,推动纪录片市场的良性运转。

目前中国纪录片传播平台依然是条块分割,中央电视台纪录频道既覆盖全国,又面向世界,但3.5亿元人民币的资本远远无法支持这一平台的节目制作与播出;地方专业频道受地域限制,与纪录片跨时空、跨文化的传播属性与正相矛盾。因此,只有以资本为动力的运营机制才能

突破平台局限，在制播分离的体制下进行公平市场交易，打破低端制作与无效传播的恶性循环，带动市场的良性运转。

第三，建构主流类型，培育市场品牌。

建构主流类型、培育市场品牌是中国纪录片市场化的重要一环。只有真正的市场品牌才能逐步撬动纪录片市场意识和观众的收视欲望，重新塑造纪录片形象与品质，建立纪录片与观众的良性互动关系。

从品牌类型来看，既有面对全球市场的纪录大片，也应有面对地域市场的本土制作。不过，中国纪录片的国际品牌究竟是什么模式，还需一定时间的研发和摸索。既要借鉴英美纪录片的国际经验和元素，又不可能亦步亦趋地模仿，而是中华价值观、中国美学与国际叙事、视听元素的融合。

因此，纪录片品牌培育应该包含两重内涵：面对全球市场，打造纪录大片；面对地域市场，突出本土制作。

《关于加快纪录片产业发展的若干意见》是中国纪录片复兴的政策保障，走出了跨越性一步。同时也应看到，限制海外纪录片仅仅是权宜之计，真正目标是发展国产纪录片，建立国内纪录片市场，参与国际纪录片市场竞争，培育出具有世界影响力的中国纪录片品牌。而要达到这一目标，不仅需要政策支持，也需要传媒机构、民间资本共同参与，因为真正的成功来自市场。

《中国纪录片发展研究报告》是一次传播学、文化美学与产业经济学的交叉研究，研究范围以全国播出的纪录片栏目、纪录片专业频道和纪录电影、纪录片特别节目为主，在国际背景下探讨中国纪录片发展之路。从2009年开始，“中国纪录片发展报告”研究项目启动。研究起点设在2000年，从2009年开始进行调研，发布年度发展报告。

此次研究的方法主要采用传播学视角，对中国纪录片从理念、制作模式、传播模式与传播效果进行全程观察，并对重要纪录片播出平台和生产基地、重要作品和人物进行调研，以期获得第一手资料。通过文本分析、数据分析和传播流程考察，对中国纪录片发展做出判断，并参照国际经验提出建议。我们殷切地希望本报告为转型中的纪录片提供一种精确的现状描述与国际经验参考。