

報告摘要

Executive Summary

序言

Introduction

文化乃軟實力之源，其重要性在全球所有先進的經濟體系中已是不爭的共識。香港現時正處於制定新文化政策的關鍵時刻——適逢香港特別行政區成立25周年，特區政府將迎來換屆選舉和架構重組的重大調整機遇，業界期待已久的文化體育及旅遊局（文體旅局）亦有望於期內成立。更重要的是，中央將香港納入「十四五」規劃的發展大局。因此，我們決定在這重要時刻，發表這份報告，提出未來文化政策的要義。

2021年3月，國家《「十四五」規劃綱要》確立了香港在國家發展大局中的八項定位，當中首次提出支持香港建設「區域知識產權貿易中心」及發展「中外文化藝術交流中心」（國家發展和改革委員會，2021）。這兩個定位對文化及創意產業（文創產業）¹的發展意義非凡。事實上，文創產業佔本地2019年生產總值的4.7%（1,293億港元）和總就業人數的6.2%（237,150名從業員）。數據顯示，「軟件、電腦遊戲及互動媒體」

The stars have aligned for new policymaking in Hong Kong. This year marks the 25th anniversary of the establishment of the Hong Kong Special Administrative Region (HKSAR). It witnesses the election of a new Chief Executive and the transition to a new Administration, the possibility of a new bureau of culture, sports and tourism, and last but not least, an ambitious vision for Hong Kong set out in the latest National 14th Five-Year Plan. This timing is critical for policymaking and hence our report strikes at this hour.

In March 2021, the 14th Five-Year Plan set out eight positionings for Hong Kong in relation to the overall development of the country. Of those, it promulgated for the first time the support for Hong Kong to enhance its status as a **regional intellectual property (IP) trading centre**, and to develop into a **hub for arts and cultural exchanges** between China and the rest of the world (National Development and Reform Commission, 2021). These two positionings present direct implications to the cultural and creative industries (CCI),¹ a sector that contributes to 4.7% (HKD 129.3 billion) of the city's GDP and 6.2% (237,150 persons engaged) of total employment in 2019. Furthermore, statistics show the main driving force of the CCI in

¹ 香港的文化及創意產業包含11個類別：i) 藝術品、古董及工藝品；ii) 文化教育及圖書館、檔案保存和博物館服務；iii) 表演藝術；iv) 電影及錄像和音樂；v) 電視及電台；vi) 出版；vii) 軟件、電腦遊戲及互動媒體；viii) 設計；ix) 建築；x) 廣告；以及xi) 娛樂服務。
Hong Kong's CCI comprises 11 domains including: i) art, antiques and crafts; ii) cultural education and library, archive and museum services; iii) performing arts; iv) film, video and music; v) television and radio; vi) publishing; vii) software, computer games and interactive media; viii) design; ix) architecture; x) advertising; and xi) amusement services.

更是近年來文創產業發展的主要驅動力，對2019年文創產業的總增加價值和就業人數的增幅貢獻最大，分別為44%和27%（政府統計處，2021）。

值得注意的是，自2020年香港特別行政區政府（政府）將藝術科技劃為一個新的政策領域後，藝術科技便成為文創產業的發展重點之一，並以「提升香港在國際藝壇的地位，促進文化交流，鞏固香港國際文化大都會的地位」為目標，推動藝術與科技融合（民政事務局，2022）。可見，文創產業的數碼轉型正如火如荼地進行。

同年，香港亦首次成為僅次於紐約的全球第二大藝術品交易中心（ArtTactic，2020），其中藝術品電子商務（線上銷售）所佔份額更首次超過藝術品的一般零售（McAndrew，2021）。

recent years, to be the “software, computer games and interactive media” sector, contributing the largest portion to both CCI’s total value-added and total employment in 2019, at 44% and 27% respectively (Census and Statistics Department, 2021).

Notably, this is the sector that drives developments in the field of Arts Technology (Arts Tech)—a new area of policy rolled out by the Government of the Hong Kong Special Administrative Region (the Government) in 2020, and has since become a key direction for the CCI, aimed at promoting impactful convergences between the arts and technology sectors to “enhance Hong Kong’s standing in the international arts arena, facilitate cultural exchange and strengthen [its] role as an international cultural metropolis” (Home Affairs Bureau, 2022). Clearly, the digital transformation of the cultural and creative sectors is in full swing.

It is also worth mentioning, that same year was also the first time Hong Kong became the second largest art trading centre in the world—after New York (ArtTactic, 2020), and the first time the share of eCommerce (online sales) in the Hong Kong art market exceeded that of general retail (McAndrew, 2021).

數字文化策略

Digital Culture Strategies

數字化為文化交流與貿易帶來許多新機遇，驅使世界各地政府對其文化政策作出相應調整。去年，內地相繼出台了多份藍圖，以規劃及推動文創產業「數字化」和「產業化」的進程。其中不乏具體任務和績效指標，包括培育100個以上的線上演播節目、沉浸式體驗項目和數字藝術體驗場景，以及建設十個國家對外文化貿易基地等，希望實現中國於2035年成為文化強國的目標。

再舉例，英國自從於2018年發布《數碼文化藍圖》後，已建立了國家級機構，專門培育具備**沉浸式敘事能力**的創意人才，為數碼轉型鋪路。

新冠疫情下，此發展趨勢更加明顯。2021年，南韓政府撥款1,139億韓元（約7.96億港元）用以發展**文化科技**，旨在打造「文化內容」出產強國（韓國文化體育觀光部，2021）。台灣也於近年成立專門機構，透過推進文創產業數碼轉型，向世界推廣台灣文化品牌，並且大力投資以**區塊鏈為主導的網上平台**，**促進文化內容授權與交易**（台灣文化部，2020）。

The emerging possibilities of digitalisation in cultural exchange and trading have led to the recalibration of policies by many administrations around the world. In the past year, the Mainland has published multiple blueprints that emphasised “digitalisation” and bolstering “industry-building” within the CCI, setting out clear performance indicators and concrete steps, such as the short-term goals of incubating more than 100 online productions, immersive projects and digital art installations, as well as setting up at least ten national bases for foreign cultural trading to make China a cultural superpower by 2035.

The UK, for instance, since the release of its initial *Culture is Digital* blueprint in 2018, has paved the way for the establishment of a national institution aimed specifically at building capacity in **immersive storytelling** for the UK’s creative workforce.

Amidst the pandemic, this trend has become more apparent. In 2021, South Korea allocated KRW 113.9 billion (approx. HKD 796 million) to develop **cultural technology** across the board, with the aim to become a major cultural content powerhouse in the world (MCST, 2021). Similarly, Taiwan has recently established a dedicated agency to promote its cultural brand to the world through championing digital transformations, and is now investing heavily on **blockchain-led platforms that facilitate cultural contents licensing and trading** (MOC, 2020).

本報告在響應國家政策號召的同時，更考量到本地社會和業界的實際情況。我們針對四個主要政策範疇，提出八項建議，為來屆政府提供參考，作為數字文化策略的執行綱領：

This report acknowledges the time-sensitivity of the opportunities at hand, takes into consideration the national call-to-action, and stays grounded in local developments. We offer eight recommendations under four main policy arenas, for the next Administration to consider as key action items for a Digital Culture Strategy:

1.

新局的機遇 Opportunities in the New Bureau

從管治架構而言，文創產業事務分散於兩個決策局——民政事務局（民政局）和商務及經濟發展局（商經局）。這導致政策方針與資助計劃均缺乏協調，政出多門，不利於產業的長遠發展。

有關「文化」部分，我們研究了新文體旅局的架構組成策略，探討決策局改革和職能部門再規劃。另外，我們敦促政府制訂由業界主導、科技驅動的藍圖，為文創產業領航。

Under current government structures, matters pertaining to the CCI are split across two existing policy bureaux—the Home Affairs Bureau (HAB) and the Commerce and Economic Development Bureau (CEDB). This has led to siloed directives and funding practices in the past, which is detrimental to long-term cultural development.

Focusing only on the policy portfolio in respect of “Culture”, we explore opportunities in the restructuring and strategy of the Government’s newly announced Culture, Sports and Tourism Bureau. We hope to revamp existing bureaux and departments, and urge for the formulation of a comprehensive and industry-driven blueprint that embraces technology, to guide Hong Kong’s CCI development going forward.

新局架構

我們建議新局架構包含四個元素：i)文化與藝術；ii)創意產業；iii)版權；以及iv)媒體。

首先，**我們建議**將目前負責推動(i)文化與藝術及(ii)創意產業的部門，包括民政局的文化部和西九文化區部，以及商經局的創意香港辦公室，整合及編入新局。

至於(iii)版權及(iv)媒體的部分，**我們建議**政府將商經局轄下的知識產權署、香港電台和經濟貿易辦事處的部分功能納入新局。

此外，香港是時候創立一個專門負責未來文化創意政策的機構，進一步鞏固新局在促進文化內容創造上的職能。政府可成立一個全新的機構或將現有的部門重新定位並合併，例如香港電台、創意香港辦公室，以及藝術科技專責小組等部門。

New Bureau's structure

We recommend the new bureau's structural makeup to comprise four components—(i) arts and culture; (ii) creative industries; (iii) copyright; and (iv) media.

To begin, **we recommend** the key departments that drive developments in (i) arts and culture, and (ii) creative industries currently, such as HAB's Culture, West Kowloon Cultural District (WKCD) Branches, and CEDB's CreateHK Office respectively, to be moved to the new bureau.

As for (iii) copyright and (iv) media components, **we recommend** the Government to consider including certain elements from CEDB's Intellectual Property Department (IPD), Radio Television Hong Kong (RTHK), and Economic and Trade Offices (ETOs) in the new bureau.

To fortify the new bureau's cultural portfolio, it is high time for Hong Kong to establish its own dedicated agency to champion cultural and creative contents of all kinds. The Government can consider setting up a new agency, or amalgamating existing departments or agencies, such as RTHK, CreateHK, and the Arts Tech Task Force.

新局策略

新政策局所制訂的發展藍圖，既應響應國家號召，亦要緊貼並幫助本地業界發展。我們建議藍圖覆蓋建議 1.1 所提到的四個重要範疇，提供策略性規劃及撥款。

此外，數項應優先納入發展藍圖的執行要項包括：鼓勵**內容創作和開發**（第二章）；強化**文化數據和知識產權（文化IP）貿易的數碼建設**（第三章）；及培育**新一代文創產業人才**和促進交流（第四章）。

這些執行要項總結了全球不同經濟體之文化政策的要領，並結合對國家政策和香港自身實力的分析和思考。

New Bureau's strategy

The new bureau should be responsible for devising a blueprint that takes into consideration the national call-to-action while keeping abreast of local developments and sensitivities. **We recommend** the blueprint first delineate funding priorities and strategic game plans for the four components mentioned in Recommendation 1.1.

More concretely, first action items in the Government's next cultural blueprint should include new policies to: invigorate **content creation and development** (Chapter 2); strengthen **digital infrastructures for cultural data and IP trading** (Chapter 3); cultivate **next-generation CCI talents** and talent exchanges (Chapter 4).

These action items take into consideration important cultural policy features from around the world, alongside our own capacities and alignments with the national policy direction.

2.

內容創作與開發

Opportunities in Content Creation & Content Development

建議

RECOMMENDATION 2.1

內容創作

此處的「內容」既指傳統文化藝術，亦指當代創意表現形式。行業發展趨勢表明，傳統的內容，包括不同非物質文化遺產，都能夠通過新的形式再展活力。

香港既推出首個藝術科技政策，當局應訂立清晰的目標和明確的指標，制訂更有影響力的藝術科技策略。**我們建議**政府將「支持內容創作」訂為政策目標，並就如何善用藝術科技提供指引。這包括為目前支持藝術科技發展的資助計劃，建立更清晰的定位，並且利用科技，從傳統文化形式和呈現方法中創造新的藝術內容。香港豐富且獨特的傳統文化資產，蘊含無限的潛能。

Content creation

“Content” here refers to both traditional art forms and modern creative expressions. Recent industry movements within professional arts circles show that traditional contents, including different forms of intangible cultural heritage (ICH), can be reinvigorated as a form of new content creation.

With Hong Kong’s first policies on Arts Tech, there is need for the Government to devise an Arts Tech strategy that is more impact-driven, by defining clearer policy goals and outcomes. Specifically, **we recommend** the Government to set **the creation of new artistic content** as a policy goal, and offer directions on how to create content through Arts Tech with purpose and impact. This includes setting strategic roles and targets for the funding schemes that currently support Arts Tech proposals and leveraging technology to create new artistic content from traditional cultural forms and expressions. There is a wealth of unique traditions and cultural assets in Hong Kong for our Arts Tech policies to uncover.

內容開發

創意作品和知識產權的內容開發是指將一個原創作品（如一本書）改編成不同形式，例如電影、遊戲、戲劇或動畫的過程。這種開發過程帶動創意產業之間的互動，及巨大經濟收益和文化影響力。這亦解釋了為什麼我們必須在政策中建立相應機制，鼓勵和促進原創內容知識產權開發。

現時與文創產業相關的資助當中，並沒有專門支持創意內容和其知識產權開發的計劃。資助計劃大多都是針對單一行業、單一項目或特定行業的一次性撥款，計劃之間通常沒有關聯，故此亦未能提供後續發展的縱深。此機制無法產生協同效應，亦無助於行業健全發展。

我們建議政府在新局下設立一個新的資助機制，打破文創產業資助計劃之間的隔閡，避免部門各自為政，從而促進和**支持創意內容和其知識產權的開發**，包攬各種形式的內容開發，並從現有資助項目中整合經驗、廣泛汲取行業反饋。

Content development

Imagine an original work (e.g., a book) being adapted into various formats such as film, video game, theatrical production, or animation—this describes the content development process of creative works and intellectual properties (IP). It suggests dimensions of intermediality and interactivity between creative industries which could bring about immense economic gain and cultural influence, and is why we must build mechanisms into policy to encourage and facilitate the IP development process of original contents.

Currently, there is no CCI-related funding policy with specific mandate to support the IP development of creative contents. Our funding schemes champion one-off, sector-specific projects, and are kept quite separate from other funding schemes. This undermines creative IP developments and shows that fundings are not working together, nor contributing to one wholesome industry.

We recommend the Government break down current barriers between all CCI-related funding schemes and devise a new funding mechanism under the new bureau, which transcends current silos promotes and supports the **IP development process of creative contents**, and embraces the development of content across sectors, amalgamating lessons learnt and industry feedback from existing funding practices.

文化數據建設

大數據和知識產權是當下全球熱話，世界各地的文化政策中均有涉獵：許多政府都有計劃構建文化數據生態系統，用作數據收集和分析，從而輔助公共和私營機構作出科學決策。香港長期以來缺乏一個完善的數據系統，零碎的數據就只能停留於表面，而未能將數據化為洞悉，將洞悉化為文創產業戰略。

無論是擴展「資料一線通」的範圍與功能，抑或是開發一個新的基礎建設系統，**我們建議**政府建立一個貼近時代步伐的文化數據系統，整合與文創產業相關的數據並加以分析，為公共和私營機構決策提供精闢見解。該文化數據建設應開放予粵港澳市場使用，以建立一個覆蓋面更廣的文化數據庫。

我們建議該建設應具備以下八個特點：i) 利用人工智能、區塊鏈等新興科技；ii) 促進傳統和新興文化內容的公私營數據共享；iii) 為數據收集、處理、分發和存取訂立範圍；iv) 協助針對文創產業的政策制定和行內決策；v) 公開資訊予公眾使用；vi) 與文化IP交易平台結合（詳見建議3.2）；vii) 建立認證機制；以及viii) 符合監管機制。

Cultural data infrastructure

Big data and IP are hot topics in the global discourse, featuring prominently in cultural policies around the world: Governments are making plans to build cultural data repositories for data collection and analyses, to help public and private sectors make better informed decisions. In Hong Kong, we have long suffered from the lack of a comprehensive data system. The current one is scattered and disintegrated, which has been a longstanding hindrance to CCI development.

Whether this is through expanding the scope and functionalities of Data.Gov.HK, or developing a new separate infrastructure, **we recommend** the Government build a cultural data infrastructure that is fit for the era, thus making available a comprehensive collection of CCI-related data to better inform decision-makers in public policymaking and private industries. This can also be opened to the Guangdong-Hong Kong-Macao markets for a bigger and fuller cultural data bank.

We recommend the cultural data infrastructure bear these eight features: i) utilise new technologies such as artificial intelligence and blockchain; ii) facilitate private-public data sharing across traditional and new cultural content; iii) define scope for data collection, processing, distribution and access; iv) assist decision making in public and private sectors; v) make publicly available; vi) integrate with the cultural IP trading infrastructure (see Recommendation 3.2); vii) establish an authentication mechanism; and viii) comply with regulatory measures.

文化 IP 交易平台

「文化 IP」一詞泛指多元的非物質文化及文創產品，受版權和其他類別的知識產權法例保護，例如出版、電影、遊戲、視頻、音樂、漫畫、角色設計等。一個具有競爭力的創意經濟體系，建基於知識產權及其對文化和經濟發展帶來的貢獻。隨着文創產業與數字化日漸融合，這促使我們思考，知識產權制度如何能夠容納更多創新技術、鼓勵更多交易。

目前香港未有如南韓和台灣般，充分發揮文化 IP 的經濟潛力。知識產權，包括版權、商標、專利和外觀設計等都是創意的貿易載體。要知道，版權構成了文創產業中大部分經濟活動，全球版權產業對國內生產總值的貢獻平均為 5.54% (WIPO, 2021)。² 若開發得當，香港的版權制度是有龐大的發展空間，專門推動文創產業發展，特別是在文化 IP 交易方面，促進線上貿易。

Cultural IP Trading Infrastructure

The term “cultural IP” is used to broadly cover wide-ranging intangible cultural and creative goods that could be protected under copyright and other forms of IP law, such as publications, films, videos, music, comics, character designs, etc. A competitive creative economy is underpinned by IP and its contribution to economic and cultural development. This is becoming more apparent as the CCI becomes increasingly interwoven with the digital sphere, which propels us to think about how the IP regime can accommodate more innovative technologies, as well as encourage more lucrative trading across and beyond the CCI.

In Hong Kong, we have not been able to fully leverage the economic potentials of cultural IP the same way economies such as South Korea and Taiwan have. IP rights including copyright, trademark, patent, and design are all vehicles of trade for creativity. It must be noted that copyright constitutes the basis for most economic activities in the CCI and that the average contribution of copyright industries to GDP is 5.54% worldwide (WIPO, 2021).² IP rights including copyright, trademark, patent, and design are all vehicles of trade for creativity. If harnessed properly, Hong Kong’s copyright regime has a lot of room for development as a standalone portfolio for the CCI, especially in the realm of cultural IP trading—and an online one at that.

² 根據世界知識產權組織 (2021)，南韓的版權產業對國內生產總值的貢獻為 9.89%，中國內地則為 7.35%。雖然沒有香港的相關數據，但若與我們最相近的數據相比，文創產業對本地生產總值的貢獻只有 4.7%，仍低於全球平均數字。
According to WIPO (2021), South Korea’s copyright-based industries account for 9.89% of GDP, while mainland China’s account for 7.35%. Although no figures are available for Hong Kong, but our most comparable figure—cultural and creative industries’ contribution to GDP, which is 4.7% of GDP—is still lower than the global average.

建議
RECOMMENDATION 3.2

我們建議政府建立一個致力於推廣文化IP交易的數碼平台，並藉此促進香港文化「走出去」和發揮經濟作用。政府可以完善現有的亞洲知識產權交易平台，或建立一個全新、專為文化IP交易而設的平台。

該建設應具備數據庫和交易功能，與文化數據建設結合（詳見建議3.1），並且供本地、區域及國際市場使用。這將有助進一步實現國家「十四五」規劃中，將香港打造成為中外文化藝術交流中心和區域知識產權貿易中心的兩個願景。

We recommend the Government build a digital platform dedicated to the facilitation and promotion of cultural IP trading and exchange, and recognise the economic potentials of copyright as part of culture “going out” for Hong Kong. The Government can consider building on the existing Asia IP Exchange platform, or establish a new digital infrastructure dedicated to cultural IP trading entirely.

We propose the infrastructure bear database and trading functions, synchronised with the cultural data infrastructure (see Recommendation 3.1), and is made accessible to local, regional, and international markets. These will further contribute towards our greater ambitions of being a cultural exchange and IP trading hub as per the National 14th Five-Year Plan.

建議
RECOMMENDATION 4.1

跨境文創合作和培訓機構

人才培育是助香港落實「十四五」新文化願景和定位的關鍵。**我們建議**政府探索與粵港澳大灣區（大灣區）研究機構和產業合作的可能性，建立提升文創產業發展的跨境機構，實踐新一代創意人才的培訓。這些機構應具備文創產業相關技術的研發能力、能夠提供產業培訓的機會、並跨越粵港澳三地，以便加強大灣區的文化交流，拓寬人才培養的渠道。

我們建議未來的跨境培訓機構必須建基於三大支柱：業界、政府和高等院校，並涵蓋以下要素：i) 提供包括實時遊戲引擎、實時3D和其他沉浸式技術等面向未來的培訓；ii) 以業界為主導，並提供實習機會；以及 iii) 注重人才發展，對人才建設有長遠規劃。在政策的支持和推動下，香港定能把握住大灣區的機遇。

Cross-border collaborations and CCI institutions on talents-grooming

Nurturing talents is a key strategy to realising Hong Kong's new cultural visions and positioning under the 14th Five-Year Plan. **We recommend** the Government explore establishing cross-border institutions with research institutes and industry partners in the Guangdong-Hong Kong-Macao Greater Bay Area (GBA) that are centred around CCI development and aimed at grooming the next-generation creative workforce. These institutions shall have research and development (R&D) capacity to develop CCI-related technologies, offer training opportunities with industry partners, and cross Guangdong-Hong Kong-Macao borders to enhance cultural exchanges within the GBA to broaden talent training avenues.

We recommend the proposed institution find support and anchorage from industry, government, and higher education institutions (HEIs), and demonstrate they: i) can offer future-proof programmes including proficiency with Real-Time Game Engines and other immersive and real-time 3D technologies; ii) are industry-led and fuelled by practical work placements; and iii) are talents-driven in that they contribute to a long-term talent pipeline that aims to upscale and cultivate the next generation creative workforce. Powered by policy support, Hong Kong is well-positioned to capitalise these opportunities in the GBA.

未來文化及創意產業人力規劃

極為關鍵的是，政府需制訂並實施文創產業的未來人才策略，才能確保該行業的創造力和競爭力。正如《2021年施政報告》中指出，藝術科技人才在未來將起到至關重要的作用。

然而，籌建於2020年的藝術科技專責小組原定應有教育局的參與，並負責制訂包括人力規劃在內的策略和措施，惟至今仍未公布任何具體措施。

我們建議政府透過新局、藝術科技專責小組或其他方式，制訂長遠人才培育策略，以激勵行業的發展。此人才發展規劃尤須注重數字化和沉浸式趨勢下所需的技能。

Strategic manpower planning for future CCI talents

It is of utmost importance that a government-initiated strategy on future CCI talents is devised, and implemented, to ensure a competitive future for the industry. As per *Policy Address 2021*, Arts Tech talents will play an important role in the future of the CCI.

The Arts Tech Task Force effective as of 2020 rightly involved the Education Bureau and was supposed to be accountable for devising an Arts Tech strategy that includes a manpower plan, but no concrete plans have been announced up till today.

We recommend the Government, via the new bureau, the Arts Tech Task Force or otherwise, formulate a long-term manpower roadmap to galvanise the sector and expedite training. This farsighted Human Resources Strategy for CCI development shall draw specific attention to skillsets required under an increasingly digital and immersive landscape.

總結

Conclusion

上述建議涵蓋新局架構及策略、內容創作及開發、數碼建設和人才培育等四大政策領域，構成香港未來文化政策所需的**八個優先執行要項**。這些建議不僅緊貼時代發展、對香港的未來攸關重要，更是對實現「十四五」規劃中的願景具重要意義。

The recommendations set out above, spanning the new bureau, content creation and development, digital infrastructures, and talents make up **the first eight action items** needed in a Digital Culture Strategy for Hong Kong. They are not only relevant to the times, important to Hong Kong's future, but also strategic to the attainment of an important national goal for Hong Kong.