

A Guide to Arts and Culture Opportunities in China

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1. Introduction

Opportunities for international collaboration in China are wide-ranging. The British Council in China has commissioned this practical guide to arts, culture and creative activities to help UK stakeholders access these opportunities. This report is to support cultural and creative organisations, artists, practitioners, and SMEs to better understand the trends and developments across China's cultural and creative sectors.

All too often, relationships are focused on the largest markets and the so called first tier cities including, Shanghai, Beijing, Shenzhen and Guangzhou. This guide highlights the “off the beaten path” developments and opportunities in China. These include new and emerging fields of arts and culture as well as cities and regions which have their own unique cultural identity and offer. The report is broad in scope, covering national and regional policies, and cultural projects and activities from the breadth of China's provinces and sectors. It should act as a starting point to encourage artists, SMEs and institutions in the UK to further explore relevant opportunities for collaboration in China.

The British Council commissioned a similar guide in 2008. In the past ten years, the cultural sector in China has changed drastically with huge investment in infrastructure and massive audience growth. The number of large UK institutions working in China has also increased to include the Tate, British Museum and the V&A. The new guide provides an up-to-date view of the Chinese cultural landscape with the aim of strengthening the existing cultural relationship between China and the UK. Particular focus is given to opportunities for SMEs, individual artists and smaller institutions who would like to work in China.

The guide lays out the opportunities for the UK in sectors that are relevant across all of China, including: performing arts, film, the visual arts, cultural heritage and cultural tourism. It also covers regional developments and opportunities across four of China's key territories:

- **North Central** focusing on the following primary cities: Beijing and Xi'an, and the following secondary cities: Dunhuang, Tianjin, Harbin
- **East** focusing on the following primary cities: Shanghai, Suzhou, Hangzhou, Nanjing and the following secondary cities: Wuzhen, Wuxi, Ningbo
- **Greater Bay Area** includes the Hong Kong Special Administrative Region, Macao Special Administrative Region, and nine cities in China's Guangdong province including; Guangzhou, Shenzhen, Zhuhai, Dongguan, Huizhou, Zhongshan, Foshan, Zhaoqing and Jiangmen
- **South West** focusing on the following primary cities: Chengdu, Chongqing and the following secondary cities; Kunming, Guiyang

For this work we consulted many producers, policy makers and experts in China's arts and culture scene. These consultations provide an up-to-date and on-the-ground account of what's happening and the opportunities for collaboration. Where there is supporting data available we have referenced throughout. Readers are encouraged to follow the links and to use that source material to further explore any specific areas of interest.



Image First Film Festival

2. Summary of Findings



Photo by Craig Whitehead

Arts and culture are central to the Chinese government's economic and social development plan for the country. Since 2010, the country's cultural offer has been restructured and has benefitted from intensified nationwide investment. Up to 2018, China had the world's largest video games industry, the second largest art market and the second largest film industry, with more cinema screens than any other country. Despite the size and the scale of development of the cultural industries, there remains capacity to grow and a shortage of talent, skills, content and services.

2.1 Performing Arts

- International producers and artists need to localise and adapt productions and shows with Chinese partners to align with the local context and audience tastes. The trend for adapting existing work signifies a move away from the simple importation of existing shows towards the production of original works with foreign partners.
- There is a shortage of talent and expertise in a number of areas specific to the contemporary performing arts and China needs to develop its home-grown talent in this area. Consequently, there is an opportunity for international educational and training institutions to help develop training programmes with institutional partners in China.
- China's performing arts festival scene in major cities is well developed, with established international connections and partnerships. There are many new festivals emerging in lesser known cities and regions which offer better opportunities for international collaboration.
- There is growing demand for immersive theatre, immersive technologies and alternative performing arts formats, with a number of UK and international producers already having success in this area.
- Outdoor music events and festivals contribute to more than 60% of the total ticket sales in music performances across China and there was an increase of over 65% in the revenue generated from musicals in 2017. While the music sector is heavily regulated, local partners provide an opportunity for foreign music brands, operators and related professionals to expand into China.
- UK performing arts companies serious about working in China need to allow for the considerable difference in scheduling

practices and plan accordingly. This includes allocating resources to adapt content for the local market and time for touring approval procedures. Local partners are critical to this process, as foreign producers and companies cannot apply for performance and touring approval without their support.

2.2 Film

- China is the second largest film market in the world and predicted to become the largest. The UK-China co-production film treaty promised to support UK film makers to access finance and audiences in China, yet only one co-production has completed since the signing. However, there is an emerging independent, art-house and event-cinema scene across China that offers alternative routes in for foreign producers.
- Film festivals in China include international programmes and screening opportunities that are exempt from the quota for international films in China. The relatively open film festival scene affords ways to work in China beyond the commercial market.
- There are a relatively small number of independent and boutique cinemas in China but that number is growing. An alternative to the mainstream blockbuster cinema chains, these cinemas offer opportunities for screenings for independent film.
- As demand for alternative film experiences increase, on-demand screenings services for art-films and documentaries are becoming more popular.

2.3 Visual Arts, Cultural Heritage and Cultural Tourism

- In 2017 China became the second largest art market in the world and during the past decade the number of museums in China more than tripled. China has 55 UNESCO World Heritage Sites and is the largest domestic and outbound travel market in the world.
- China's recent boom in the arts, museum and heritage sectors has not been matched by an increased supply of talent. Due to the rapid growth of the sectors, educational offerings have fallen behind and there are not enough qualified educators

or training programmes. This provides an opportunity for UK institutions to support training and professional development across the country.

- China is using technology to preserve and scale access to its heritage and to encourage tourists to look beyond the most popular destinations. The digitisation of China's culture and heritage represents a key opportunity for international collaboration.
- Chinese museums, galleries and shopping malls are capitalising on an appetite for multimedia and visual technology to draw tourists and large audiences to immersive exhibitions. This is an area of high potential for international digital artists and immersive producers.
- For smaller and less established institutions and artists, arts residencies and cultural exchange programmes offer an alternative route to working in China. The country has a growing art residency scene with funding available for international artists.
- There are several world-renowned cultural heritage projects and sites in the north of China. These projects already work with some of the leading international institutions to preserve the sites and make them available for domestic and international tourists, and as an online resource. The continued development of this heritage will bring further opportunities for international partnerships.
- There is great emphasis on the preservation and cultivation of South West China's cultural heritage and crafts. Ongoing projects and events in the region offer opportunities for international participation.

2.4 Regional Developments and Policies

- There are over 20 provinces in China and a number of large-scale municipalities and semi-autonomous regions. Different provinces, municipalities and regions have unique cultures, economic development plans and cultural policies that vary greatly. Understanding the local context is important for understanding where there are opportunities in China. This guide summarises many of the policies and cultural development plans for cities and regions that present incentives and opportunities for collaboration with international artists and organisations.

3. China's Arts and Cultural Industries



Photo by Yiran Ding

Arts and culture are central to the Chinese government's economic and social development plan for the country to help move it from a manufacturing-based economy to a modern knowledge-based economy.¹ The government understands culture as a force to drive economic growth.² Recommendations from the 13th Five-Year Plan for Economic and Social Development (2015) include the "basic establishment of a public cultural service system". China's ambition is to make the arts, culture and creative industries a pillar of its economy.

Since 2010, the country's cultural offer has undergone restructuring alongside intensified nationwide investment. In 2016, the added value of the Chinese culture and related industries³ reached over 3,078 Bn. CNY⁴. In 2017, the value added of those industries reached over 3,472 Bn. CNY, accounting for 4.2% of GDP.⁵

In 2018 China was home to the largest video games industry in the world.⁶ The film industry⁷ and art market⁸ were second largest globally, with more cinema screens than anywhere else in the world.

In 2014, a third of China's 2,000+ theatre venues had been built since 2000. The 2008 Beijing Summer Olympics drove the development of cultural infrastructure with the 2022 Beijing Winter Olympics also expected to reenergise development. Most cities in China have a theatre, and in bigger cities most major districts have one.

¹
2018 China Moderization Report: Study of Moderization of Industrial Structure, <http://www.modernization.ac.cn/document.action?docid=57081>

²
http://zwgk.mct.gov.cn/auto255/201908/t20190823_845869.html

³
Culture and related industries in China, refer to the collection of sectors that offer cultural and culture-related products to the public. There are three sub-industries, cultural manufacturing, cultural wholesaling and retailing, and cultural service industry. These include the creation, production, communication and exhibition of cultural contents, but also the production of auxiliary equipment and mediums such as musical instruments and other communicative and entertaining devices. For the purposes of this report and from this point on, when we refer to China's cultural industry we loosely mean the collection of industries equivalent to the UK's cultural industries.

⁴
http://www.stats.gov.cn/tjsj/zxfb/201709/t20170926_1537729.html

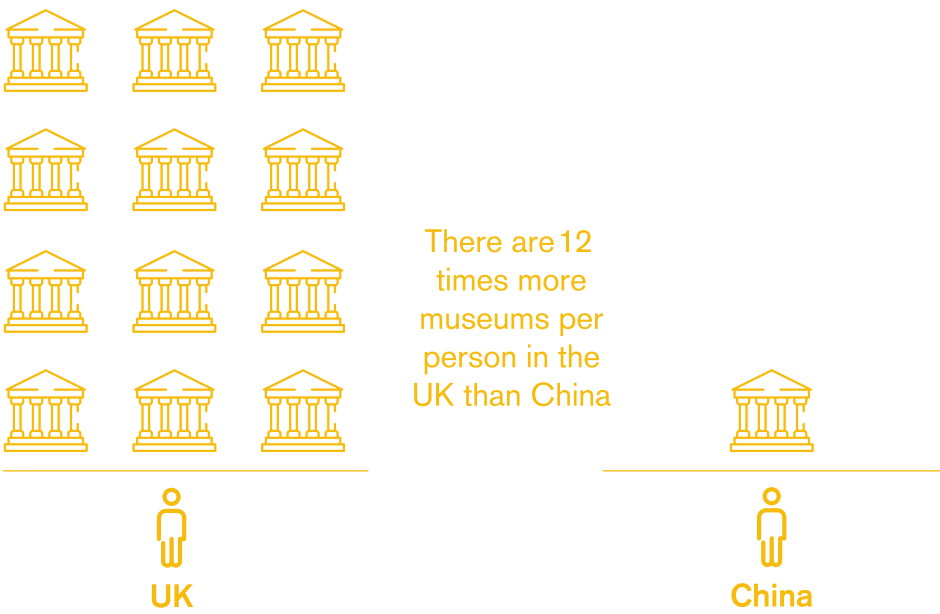
⁵
http://www.stats.gov.cn/tjsj/zxfb/201810/t20181010_1626867.html

⁶
<https://newzoo.com/insights/articles/global-games-market-reaches-137-9-billion-in-2018-mobile-games-take-half/>

⁷
<https://www.marketing-interactive.com/chinas-total-number-of-cinema-screens-now-exceeds-the-us/>

⁸
<https://www.artprice.com/artprice-reports/global-art-market-in-h1-2019-by-artprice-com>

Despite the size and the scale of development of the cultural industries there is still capacity to grow. In the UK there are over 50,000 people per theatre⁹, whereas in China there are over 580,000 people per theatre¹⁰. There are approximately 25,000 people per museum¹¹ in the UK and approximately 300,000 people per museum¹² in China.



While there has been significant investment in cultural infrastructure, there remains a shortage of talent, skills, content and services required for a world class arts and culture industry. To help develop the cultural industries, China is increasingly looking to internationalise and collaborate overseas through funding provided for touring exhibitions; research, educational and training programmes; arts residencies and investment incentives for creative businesses to establish a base in China. There are also opportunities for the provision of consulting and professional services.

⁹ <http://www.theatrust.org.uk/discover-theatres/theatre-faqs/167-how-many-theatres-are-there-in-the-uk>
¹⁰ <https://chinanow.britishcouncil.cn/wp-content/uploads/2017/03/Report-of-Performing-Arts-Professional-Development-Skills.pdf>
¹¹ <https://www.museumsassociation.org/about/frequently-asked-questions>
¹² <http://en.people.cn/n3/2018/1229/c90000-9533275.html>

4. Performing Arts



Photo by Devaiah Mallangada Kalaiah

China has a long tradition of performing arts in the form of classical dance, music and Chinese opera. Recent nationwide structural reforms across the performing arts sector are aimed at moving the sector away from a dependence on the 'iron rice bowl' of government subsidies and developing a more commercially-orientated sector. These reforms, alongside massive investment in new theatres by government and property developers, have created opportunities for collaboration with international partners.

According to the China Association of Performing Arts, in 2018 the total box office revenue across China was over 18 Bn. CNY, an increase of 3% over the previous year with more than 100,000 performances in professional theatres: a 9% increase of the number of performances from the previous year.¹³

This section highlights major trends, opportunities and challenges for the UK in China's performing arts scene and in some key regions and cities.

4.1 Adaptations, original works and translations with Chinese partners

In recent times a lot of theatre produced in China has drawn on collaboration with foreign partners, with the performing arts sector looking internationally for inspiration. The Chinese government recognises the value of encouraging foreign theatre companies, practitioners and experts to come to China, to promote innovation and help the development of the domestic sector.

"Chinese audiences have been paying greater attention to international performances and actively look for what's happening overseas." Chenlin Zhao. Market Director, Shanghai Media Group (SMG)

However, as China's performing arts sector matures and audience tastes become more developed, international producers and artists need to do more to attract Chinese audiences and make their work more accessible.

"If they want to attract Chinese audiences and to be better recognised in China, British organisations are suggested to ...increase the accessibility of their products in ways that are more friendly to the Chinese audience"

One of the stand-out theatrical shows in China in recent years, has been Shanghai Media Group's adaptation of the UK's Punchdrunk's Sleep No More¹⁴. Part of the success of the show and the collaboration is SMG's understanding of the importance of localising the show to make it more accessible for Chinese audiences.

"We spent considerable time discussing how we could make Sleep No More live in this city and have a logical interaction with the local culture. What has been produced is an experience that involves Shanghai elements in settings, storyline and characters and the audience really appreciate it."

This localisation suggests that for foreign productions to be attractive to local partners they need to be open to adapting their work for Chinese audiences.

"Another consideration is to include content elements that help build a world existing at a comfortable distance for the Chinese audience. For example, too far is using English place names or too close is, for example, relocating the story setting to Chinese contexts which yields unsatisfactory reactions. A common solution is to set the story in an unspecified theatrical world." Lucas Wang, Artistic Director, Inside-Out theatre

This trend of adapting existing work represents a move away from the simple importation of existing shows towards the production of original works with foreign partners. For this to be a success, foreign partners need a solid understanding of the local context for any new work, i.e. audience tastes, local history and culture, and the nuances of the local language.

"Besides importing stage performances, SMG looks to encourage more original works through collaboration. It could be the adaptation of Chinese traditional stories.... and more translated works that involve Chinese performers. SMG has been discussing with other foreign producers ... about developing original works for Chinese market. SMG hopes these co-productions would help to cultivate the talent in theatres in China." Chenlin Zhao, Market Director, Shanghai Media Group (SMG)

4.2 Demand for professional development services and training in the performing arts

"With experience in offering consultancy and training to theatres in Beijing and Shanghai, the UK is in an advantageous position to make inroads into this market with an emphasis on theatre alliances such as China Poly Group." Lynn Fu, independent performing arts programmer, curator and consultant

In the past decade, there has been an explosion in the number of theatres opening across China. However, most available theatre education programmes focus on areas where there have traditionally been employment opportunities, for example Chinese opera and drama. This has led to a shortage of talent and expertise in a number of areas specific to the contemporary performing arts. As demand for theatre and live entertainment increases, China needs to develop its home-grown talent.

Consequently, there is an opportunity for international educational and training institutions to help develop training programmes with institutional partners in China.

"Today, managers of Chinese theatres are either government officials, artists from troupes, or other related individuals, who have no such integrated skills."¹⁵

There is a shortage of theatre technicians, particularly outside of the leading cities, as national operators and producers typically recruit and employ the best talent. More programmes are required to provide technical skills training.

In recognition of the problem, a number of UK institutions have developed partnerships to provide training and skills development opportunities, for example:

- the National Centre for the Performing Arts in China have established a partnership with the UK's Royal Opera House to offer training programmes to theatre professionals.¹⁶ Topics covered include production, stage management, theatre operation and management.

- As a part of their outreach education programmes, Shakespeare's Globe theatre worked with teachers in Zhengzhou to explore creative approaches to teaching Shakespeare in non-English speaking states schools.¹⁷
- The UK's Arts and Humanities Research Centre (AHRC) collaborates with the Shanghai Theatre Academy (STA). STA is one of China's most renowned higher education institutions for the performing arts in China. The AHRC provides funding and placement opportunities for UK academics and researchers to work at STA.¹⁸

As expectations and demand grow for more technically advanced immersive and digitally enabled experiences, there will be a need to develop more advanced technical theatre skills, including motion capture, live VR experiences, and interactive design. (See, 4.4)

4.3 Performing arts festivals in second and third tier cities as an opportunity to collaborate

China's performing arts festival scene in and around the major cities is already well developed (see 4.7), with established international connections and partnerships.

The success of these festivals alongside efforts to use cultural activities to attract tourists (see 6.1) are leading to many new festivals to emerge in lesser known cities and regions across China.

“Look beyond Beijing, Shanghai and Guangzhou, as many new festivals are emerging in second, third and fourth tier cities, which are in urgent need of content and professional training in management and technique.” Lynn Fu, independent performing arts programmer, curator and consultant

With places like Shanghai and Beijing already working with international performing arts producers, and with stiff competition in those cities, it is recommended that international producers seek out partners in cities and regions that are “off the beaten

track”. However, the opportunities in second and third tier cities also reflect a lack of experience with international collaborations. Consequently, international producers need to manage expectations, understand the local context and be prepared for a potential lack of local experience with international practices.

The eastern region in particular hosts many established, high profile and emerging lesser known performing arts festivals. Festivals are a useful entry point to China and a means to find Chinese partners for international artists and producers. Examples include:

- **Wuzhen Theatre Festival:** an annual theatre event in the ancient water town of Wuzhen. The festival regularly collaborates with and programmes international artists and productions.¹⁹
- **Yue Opera Town:** the first “cultural town” in China featuring the performing arts, is home to four core theatres, small studios, an artists' villages, a Chinese opera museum and a Yue Opera art school. In 2019, it held the first Yue Opera Town Theatre Festival and, with support from the International Theatre Town Alliance, an international network of theatre towns, a flagship event “Belt and Road National Culture and Art Exhibition” welcomed performers from Belt and Road countries.²⁰
- **Xintiandi Arts Festival:** Xintiandi is a recently regenerated area of downtown Shanghai. The arts festival is operated by a property developer and the programme includes a contemporary blend of local and international performances and artists.²¹

4.4 Immersive theatre and technologies, and alternative formats

Immersive experiences are a new form of content and demand an innovative approach to telling stories through a combination of new and existing technologies. These processes and skills draw on expertise from across the arts and associated technology sectors. This area spans the performing arts, theme-parks, exhibitions, video games, film and more.

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<https://www.xintiandi.com/en/arts-culture/#1547075602054-29861ec1-f6f3>
22
<https://www.digi-capital.com/news/2017/01/after-mixed-year-mobile-ar-to-drive-108-billion-vr-market-by-2021/>
23
<https://www.weforum.org/whitepapers/creative-disruption-the-impact-of-emerging-technologies-on-the-creative-economy>
24
<https://www.digi-capital.com/news/2018/10/7-billion-computer-vision-ar-investment-china-surges-america-dries-up-in-ltm/>
25
http://www.gov.cn/xinwen/2016-09/22/content_5110939.htm
26
<https://www.pwc.co.uk/issues/innovation-and-technology/mapping-the-growth-of-virtual-reality-in-the-uk.html>
27
<https://www.digi-capital.com/news/2019/01/for-ar-vr-2-0-to-live-ar-vr-1-0-must-die/>

“As Shanghai is looking to build itself as the capital of performing arts in Asia, the market demand for innovative and high-quality works is strong, especially towards non-traditional formats of performance.” Dr. Marina Guo, Head of Arts Management programme, School of Creative Studies, Shanghai Theatre Academy

Internationally the immersive industry is still in its infancy but it is expected to reach £100 Bn. GBP worldwide by 2020²² with immersive live entertainment expected to be worth \$9 Bn. USD by 2025.²³

China is now the world’s leading investor in immersive technologies²⁴ and in 2018 the Chinese government issued specific policies for the development of immersive tech and live entertainment. In a document titled *“Opinions on Promoting Transformation and Upgrading of Cultural and Entertainment Industry”* it promotes the integration of advanced technologies, such as VR and AR, into the cultural and entertainment industry.²⁵

The UK is the largest market for AR and VR in Europe, with the majority of UK companies focused on producing content.²⁶ Unlike the UK, China is a net-importer of content and content-based IP. China do not have the experience or current industrial capacity to create and produce international standard content. While the majority of UK producers working in this area are SMEs, there are opportunities to scale this work in China and access the largest single market for immersive content and live immersive experiences in the future.²⁷

UK stakeholders have already had some success in this area. For example, theatre company Curious Directive toured their VR enabled live theatre show Frogman in China in 2018 and 2019.²⁸

There are also festivals emerging dedicated to immersive technology and theatre: every year the Beijing Inside-Out theatre convenes an Arts and Technology festival.²⁹

4.5 Outdoor music festivals, classical music and musicals are all areas to explore

Outdoor music events and festivals make up more than 60% of the total ticket sales in music performances across China. There was an increase of over 65% in the revenue generated from musicals in 2017, which was more than 2 Bn. CNY in total.³⁰ It is worth noting that ticket prices for domestic festivals are much lower in China than in the UK, ranging from 200 CNY to 600 CNY. Well-known domestic Chinese festival brands include: Midi Festival, founded by Midi Music School; Strawberry Music Festival, founded by Chinese music label Modern Sky; and Storm Electronic Music Festival.

As this sector grows there is an opportunity for foreign festival brands, operators and related professionals to expand into China. However strict rules on outdoor public events mean that foreign producers will need to work with local partners and promoters. Examples of successful international collaborations in this area include:

- Summer Sonic Shanghai (2013) was a spin-off of the long-running Summer Sonic festivals in Japan and
- Umbria Jazz Festival Week (2016) was a spin-off of the festival in Italy, co-organised by the Chengdu government and Chengdu Art Theatre

The national concert and musical performance market in China is dominated by Beijing, Shanghai and Guangdong, which altogether generated 370 M CNY in box office revenues in 2016.³¹ Each year many international orchestras tour China and host workshops with local musicians. Examples of recent tours by UK orchestras include:

- Philharmonia Orchestra and its principal conductor and Esa-Pekka Salonen had their first joint appearance in China in 2018, with four concerts in Nanjing, Shanghai, Wuxi and Beijing. As part of the tour the Philharmonia also provided training programmes and instrumental workshops.³²
- In 2018 the BBC Concert Orchestra toured China with conductor Barry Wordsworth, performing a programme of English

28
<https://www.curiousdirective.com/frogman2017>
29
<http://tech-art.zhongjianjuchang.com/>
30
<http://www.re-chord.net/1450031>
31
<http://info.audio.hc360.com/2017/04/051529507353.shtml>

and Chinese repertoire in Shenyang, Qingdao, Changsha, Hefei, Shanghai and Nanjing.³³

- In 2018 the BBC National Orchestra toured China with a principal guest conductor Zhang Xian³⁴

Foreign musicals attract the largest audiences and can successfully fill the largest venues in Beijing and Shanghai. Despite the growing quality of locally produced musicals, imported performances are still the most popular, particularly when they are localised and translated into Chinese. Box office revenue is typically dominated by a small number of blockbuster shows. For example, in 2015 *The Phantom of the Opera* was responsible for half of the total musical box office takings in Beijing.³⁵

2018 saw a massive increase in the number and the scale of musicals in China, with Shanghai leading the way. The city hosted over 350 performances with a box office revenue of more than 50 M CNY in the first eight months, an increase of 166% over the previous whole year.³⁶

4.6 Challenge: Touring, differences in scheduling and procedures

“The gap between working patterns in both countries is an issue. Theatrical projects are usually-scheduled to tour one-two years ahead in the UK, while many Chinese theatres plan their programmes six months ahead or even sooner”

Lynn Fu, independent performing arts programmer, curator and consultant

UK performing arts companies serious about working in China need to allow for the considerable difference in scheduling practices and plan accordingly.

“...possible revisions of content with regard to censorship takes time and an open attitude. Even without modification, it could take about a month to gain administrative approval.”

This includes preparing for having to adopt content for the local market and making an allowance for touring approval procedures, as the ministry of culture must officially approve all tours, with approval time taking 20–40 days.

Local partners are critical to this process as foreign producers and companies cannot apply for performance and touring approval themselves without support.³⁷

4.7 Regional Focus: Performing Arts in Beijing, Shanghai and the East

Beijing is a leading city for the performing arts in China. In Beijing in 2018 there were over 24,000 performances with over 11 M attendees, and box office revenue of 1.8 Bn. CNY.

Opera and music generate over 80% of all box office revenue in Beijing. The audience for musicals is growing rapidly, with a leap of over 25% in the number of audiences attending in 2018 compared to the previous year. However, plays, circus and acrobatics and children’s drama attracted the most audiences, with a total of over 5M attendees, accounting for 46.2% of the total audience.³⁸

In 2016 in Shanghai alone there were almost 6 M attendees to over 50 theatres across the city. The theatres with the greatest attendance include the Shanghai Dramatic Arts Centre, Shanghai Grand Theatre and Shanghai Culture Square.³⁹

The live music sector in 2016 attracted the largest audiences, with almost a million attending concerts in Shanghai. In terms of box office revenue, the live music market accounts for 45% of total performing arts income in the city.⁴⁰

Children’s theatre is one of the fastest growing performing arts sectors in Shanghai. In 2016, 15% of all performances in Shanghai theatres were for children.⁴¹ The first season of 2017 saw an increase of over 27% in the box office revenue of children’s theatres, which reached 12 M CNY and received 145,000 attendees.⁴²

The eastern region also hosts many established, high profile and emerging lesser known performing arts festivals (see 4.3).

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https://www.philharmonia.co.uk/concerts/2368/shanghai_salone_n_and_zimmerman
33
<https://www.bbc.co.uk/events/ewd4mb>
34
<http://www.chinadaily.com.cn/a/201812/06/WS5c089148a310eff30328f6df.html>
35
<http://news.ifeng.com/50667097/news.shtml>
36
<http://www.ccm.gov.cn/zgwhscw/ycsc/201812/c6e5fbb7e9b54a898bc96cf3febdc04.shtml>

WS5c089148a310eff30328f6df.html

37
http://ccilc.pt/wp-content/uploads/2017/07/eu_sme_centre_report_-_culture_and_creative_industries_in_china_jul_2014.pdf
38
http://www.bjstats.gov.cn/tjsj/yjdsj/whcy/2018/201902/t20190201_416257.html
39
<http://www.leadingir.com/trend/view/338.html>
40
<http://www.leadingir.com/trend/view/338.html>
41
http://www.ce.cn/culture/gd/201704/03/t20170403_21692273.shtml
42
<http://www.idaolue.com/UploadFile/File/zgxjscjb.pdf>

5. Film

With more than 45 Bn. CNY in box office revenue in 2017, China is the second largest film market in the world⁴³ and predicted to soon become the largest.⁴⁴ China has more cinema screens than any other country⁴⁵ and is a leader in alternative film formats i.e. IMAX, 4D etc.

In 2018, China introduced 118 films from 18 countries, accounting for almost 40% of the total box office of 60.9 Bn. CNY.⁴⁶ 2018 also saw the best box office performance by a domestic film. However, in the first half of 2019, there were already near 70 foreign films shown in China, contributing to over 50% of the national box office.⁴⁷

While foreign films generally have a higher value at the box office in China than domestic productions, challenges for foreign films in China remain. These include understanding differences in taste between Western and Chinese audiences, censorship and political sensitivity, and policies to protect the domestic market which limit the availability and distribution of foreign films in China.⁴⁸

The UK-China co-production film treaty promised to support UK film makers to access finance and audiences in China.⁴⁹ However, only one co-production has completed since the signing⁵⁰ while US-style superhero blockbusters are the type of foreign films dominating Chinese box office.⁵¹

However, there is an emerging independent, art-house and event-cinema scene across China, offering audiences an alternative film experience counter to the blockbuster films dominating cinemas. This section explores those trends and related opportunities.

5.1 Film festivals are more open than the commercial film market

Co-productions were seen as an entry point for UK film makers, however, since it's signing only one China-UK co-production has been completed. However, China has a relatively open film festival scene that provides ways to work in China beyond the commercial market.

Film festivals in China include international programmes and screening opportunities that are exempt from the quota for international films in China. Festivals also typically invite international

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<https://variety.com/2017/film/asia/china-box-office-expands-by-2-billion-in-2017-1202650515/>

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<https://www.scmp.com/culture/film-tv/article/2140381/china-will-soon-be-worlds-top-film-market-having-overtaken-us-canada>

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<https://www.thetimes.co.uk/article/china-overtakes-us-for-having-the-most-cinema-screens-w9z7cvnn3>

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<http://www.sh.chinanews.com.cn/yule/2019-06-20/58622.shtml>

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https://www.thepaper.cn/newsDetail_forward_3866587

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<https://americanfilmmarket.com/working-in-film-in-china/>

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<https://www.bfi.org.uk/news-opinion/news-bfi/announcements/uk-china-sign-film-co-production-treaty>

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<https://www.ukchinafilm.com/the-special-couple/>

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<https://www.screendaily.com/news/chinas-box-office-increases-by-9-to-89bn-in-2018/5135508.article>

experts and speakers and host masterclasses alongside screenings. China's leading film festivals include:

- **Shanghai International Film Festival (SIFF)**, established in 1993. The festival is China's most prominent and international celebration of film. In 2018 the festival's awards attracted 3,447 film entries from over 100 countries. It is a genuinely international festival hosting screenings and premieres of films from around the world⁵²
- **The Beijing International Film Festival (BJIFF)**, sponsored by the national and Beijing governments, was established in 2011. BJIFF spans 15 days and includes screenings and forums on arthouse film, digital cinema and internet film.⁵³ The 2018 Tiantan Awards, the highest awards at the festival, included 659 films from 71 countries and regions.

Beyond these high-profile festivals there is also an alternative film festival scene. While those festivals do operate outside of the restrictions that the commercial film market is subjected to, they are constantly monitored.^{54,55} Some of the festivals include:

- **Just Film Festival** is the first festival in China dedicated to fantasy and sci-fi cinema.⁵⁶ The selection of films is international and founders hope to promote communication and collaboration between Chinese and European sci-fi producers.
- **First Film Festival**, hosted in the city of Xining on the Tibetan plateau aims to "present films whose stories and themes would not appear at other festivals in China". It is an event that is firmly focused on the arthouse and independent end of the Chinese film scene which intends to support the development of new and emerging film directors.⁵⁷
- **The Pingyao International Film Festival (PYIFF)** is a film festival held in Pingyao, Shanxi, China founded by the Chinese director Jia Zhangke. PYIFF calls itself a "boutique festival" celebrating the "achievements of international cinema and promotes the works of young Chinese directors." The festival also hosts masterclass and screenings with Q&A by some of the world's biggest names in film including Ang Lee.⁵⁸

- **Beijing Youth Film Festival** is an annual event focusing on the cultivation of young filmmakers with a dedicated fund supporting new productions. The festival has been promoting international exchange to enrich the Beijing market since 2014.⁵⁹
- **iDoc Festival** in Beijing is the first officially recognised independent documentary film festival in China. First held in 2009, from 2016 it has been a biennial event connecting Chinese audiences with some of the world's best documentaries and offering a platform for international collaboration. It has received funding support from international organisations including the British Embassy, Danish Film Institute and Goethe Institut.⁶⁰
- **Guangzhou Documentary International Film Festival** is the only state-level documentary festival in China. Working with more than 30 international film festivals, every year it gathers thousands of participants from across the world to discuss the latest international trends. The 'China Story' pitching session hopes to cultivate international documentary projects relating to China.⁶¹
- **New Media International Short Film Festival** in Shenzhen is the only nationally-recognised international short film festival in China. Founded in 2010, it promotes international collaboration and the integrated development of film, television, and the "new media industry". The festival includes a trade fair and educational programmes.⁶²

5.2 Growing number of art house and boutique cinemas

There are more cinema screens in China than anywhere else in the world, and these cinemas are typically commercial cinema chains operated by large state-owned enterprises and property developers. There are however a small but growing number of independent and boutique cinemas in China. These cinemas offer an alternative to the mainstream blockbuster cinema chains and opportunities for screenings for independent film.

As part of the National Arthouse Film Alliance there is a coalition of theatres that have committed to screening at least 10 arthouse films every week during "prime time". The network includes 100 cinemas across 50 cities throughout the country.⁶³

Beijing has the healthiest art house cinema scene and the city welcomed a new alliance of twenty cinemas specializing in the exhibition of arthouse movies, more than any other city in the country. These twenty Beijing-based cinemas, collectively known as Capital Star Alliance, can be found across the city in Dongcheng, Chaoyang, Haidian, Fengtai, and Tongzhou.⁶⁴

In Shanghai, the city's oldest movie theatre, the Grand Cinema also shows a collection of fringe films not normally found in the city's major cinemas⁶⁵ and there are a small number of private cinemas⁶⁶ which offer an alternative selection of films to those shown in mainstream cinemas.

5.3 Screenings on-demand for art-films and documentaries

As demand for alternative film experiences increases, services that respond to that demand are emerging.

“People used to think it’s unbelievable to go to the cinema for documentaries, but it’s common practice now.” Fuqiu Xiao. Media Manager, Elemeet⁶⁷

Launched in 2016 Elemeet is a screenings on-demand platform. Offering users an opportunity to request, vote for and attend screenings of films at participating cinemas. A typical film screening would go through the following steps:

- 1. Elemeet acquires the screening license
- 2. an Elemeet user initiates a local screening event and gathers enough participants through the platform
- 3. Elemeet coordinates with a cinema to secure a time and venue
- 4. The film is screened, often followed with a talk or panel discussion.

Operating essentially as a social media platform, Elemeet is able to operate with a lower budget than the traditional marketing strategy for blockbuster films. And while most films on its platform are not mainstream, Elemeet does not restrict itself to any niche market.

Since its launch more than 100 films have been screened with over 2,600 cooperating cinemas, with more than 3,000 screenings in more than 300 cities nationwide and an average attendance rate well over 80%.

The platform is now a credible film distributor and for an upcoming film Elemeet will hold a “100 city premiere” in a single day.

“We’ve been diligently engaging with the non-mainstream film market in China for the past three years... particularly art films and documentaries.”

“We make film going much like a social event with online and offline interaction between critics, directors, producers, and users.”

5.4 Event-cinema is coming

While screenings on-demand offer online users an opportunity to use social media to coordinate film screenings, event-cinema offer another type of social experience around film.

Secret Cinema is a UK company launched in 2007 which offers full immersive theatrical cinema experiences, merging cinema, theatre and art. This year Secret Cinema partnered with SMG to bring its Casino Royale experience to Shanghai.⁶⁸

The success of this event is likely to encourage other and alternative event-cinema experiences, just as Sleep No More’s success kick-started a demand for immersive theatre experiences across China.



5.5 Regional Focus: Film Policy focus in Beijing and Shanghai

While other cities and provinces consume more film, Beijing is the film and TV production powerhouse of China.⁶⁹ To further bolster its status, in 2019 the Beijing government launched a film development plan, *“Implementation opinions on promoting the prosperous development of Beijing film and television industry”*.⁷⁰ The plan proposes to further develop the industry through integration with other industries; *to promote the development of virtual and augmented reality; to improve the “environment for IP”; to “make efforts to protect online and offline film and television copyrights”, to build an “internationally influential film industry park”, and to “encourage film and television enterprises to ...expand into the international market”*

Alongside the commercial film and TV industry, the independent and art-house film scene is also growing in Beijing (see 5.2).

The Shanghai government has committed to the city becoming a *“Global Film and Television Production Centre”* and a *“Global Animation and Gaming Production Base”*. In addition to a broader creative industries strategy, the Shanghai government has a number of specific supporting policies for the development of the film and TV industry in the city. This includes a 200M CNY funding commitment.⁷¹

In line with these policies, there are a number of ‘film clusters’ in development across the city. One such cluster includes the *“Pudong International Film and Television Industry Park”*. The park is part of a 25km² area in Pudong that includes Disneyland in China.⁷² The objective for the cluster is to become an ecosystem for the development of film and television in China as well as an international destination for film and TV production. Another similar film production and entertainment destination in Shanghai is in the Songjiang district.⁷³

In 2016 film box office revenues in Shanghai topped 3 Bn. CNY and helped the city become the number one consumer of film in the country.⁷⁴ Revenue from Shanghai-related film productions has increased dramatically in the past three years, rising from 1 Bn. CNY in 2015 to 3.6Bn. CNY in 2017.⁷⁵

Shanghai and Beijing host China’s most international film festivals (see 5.1).

Shanghai and Beijing has a growing number of private, art-house and boutique cinemas that screen films not typically found in mainstream cinema chains (see 5.2).

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<http://wgj.sh.gov.cn/node2/n2029/n2031/n2062/u1ai155301.html>
72
<https://blooloo.com/link/high-tech-film-studio-pudong-cultural-zone-shanghai/>
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<http://www.chinadaily.com.cn/a/201712/22/WS5a3cc0c4a31008cf16da2f1f.html>
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<https://www.jfdaily.com/news/detail?id=57020>

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https://www.sohu.com/a/220980195_699621

6. Visual Arts, Cultural Heritage and Cultural Tourism

In 2017 China became the second largest art market in the world.⁷⁶ During the past decade, the number of museums in China more than tripled, going from 1,722 museums in 2007 to 5,354 in 2018, with more than 1.1 Bn. visitors.⁷⁷ By the end of 2018, there were more than 1,600 private galleries and private museums in China, more than a five-fold increase from 2009.⁷⁸

In 2006, the first list of intangible heritage included 518 items at national level. Today that number is 1,219. China had its first UNESCO World Heritage site in 1987 and currently has 55 sites.⁷⁹

China is the largest domestic and outbound travel market in the world. In 2017, Chinese tourists made 2.8 Bn. trips within the country compared to 136.5 million outbound trips, with spending on domestic tourism over \$650 Bn. USD compared to \$220 Bn. USD on international tourism.⁸⁰ The most popular destinations for domestic tourism in China are Xi'an and Beijing, with places that include Chinese historical and cultural offers the most popular.⁸¹

This explosion in the number of museums and galleries, private and public, and listed heritage and World Heritage sites follows aggressive supporting policy in China. The purpose is to grow its contemporary arts offer and to harness its already significant cultural heritage offer for the purposes of supporting economic and social development, enabling cultural exchange with partner countries and to drive national and domestic tourism.

This section explores the opportunities for international collaboration in China's visual arts, cultural heritage and cultural tourism sectors.

Photo by Aaron Greenwood

⁷⁶ <https://www.scmp.com/culture/arts-entertainment/article/2137054/china-rises-no-2-art-market-billionaires-more-double-2017>

⁷⁷ http://www.xinhuanet.com/culture/2019-05/21/c_1124523067.htm

⁷⁸ <http://www.tanchinese.com/museum/45730/>

⁷⁹ <http://whc.unesco.org/en/statesparties/CN>

⁸⁰ <https://www.globaldata.com/domestic-tourist-expenditure-china-hit-679bn-2017-thanks-burgeoning-middle-class-says-globaldata/>

⁸¹ https://www.researchgate.net/publication/211102445_Domestic_tourism_in_China_Observations_on_its_growth_and_structure

6.1 The Ministry of Culture and Tourism

In 2018 the Ministry of Culture and China National Tourism Administration merged to create the Ministry of Culture and Tourism.

“The move is aimed at coordinating the development of cultural and tourism industries, enhancing the country’s soft power and cultural influence, and promoting cultural exchanges internationally.” Xinhua news.⁸²

The new ministry highlights the importance of tourism to the Chinese economy, the role of culture in the development of the domestic tourism industry and the role of culture in enhancing the country’s international cultural influence.⁸³

“As cultural tourism has been enthusiastically discussed all around China since the merge of the Ministry of Culture and China National Tourism Administration in 2018, cultural destinations are blooming and many took the form of cultural park or town.” Lynn Fu, independent performing arts programmer, curator and consultant

This recent shift puts further emphasis on the importance of developing the country’s cultural infrastructure, modernising its heritage infrastructure and supporting services, and developing its cultural exchange links internationally.

Domestic cultural tourism is not only linked to heritage related destinations and sites, with contemporary arts, culture and entertainment plus popular exhibitions, mixed-reality and immersive installations seen as a way to attract visitors. These areas offer significant opportunities for international collaboration.

6.2 Supporting training and professional development opportunities for UK institutions

China’s recent boom in the arts, museum and heritage sectors has not been matched by an increased supply of talent. Due to the rapid growth of the sectors, educational offerings have fallen behind and there are not enough qualified educators or training programmes.

‘There is a strong demand in Shenzhen for short-term professional training courses to equip graduates with practical expertise and ensure a smooth transition from universities to the industry.’ Ting Xu, Secretary-General, Shenzhen City of Design Promotion Association

In provincial and city-level museums, exhibitions often focus on the preservation and presentation of a specific collection, with less emphasis on curation and interpretation. This is partly because training in China tends not to focus on these skills. The shortage of staff and supporting educational programmes present an opportunity for international education and museum institutions to support development in this area.

For example, in 2015 the V&A in the UK developed a new training format for the Chinese museum sector and delivered two pilot three-day masterclasses for museum professionals. The second of these was titled ‘Telling Stories’, targeted at curators and exhibition producers. It included sessions on display design techniques, visitor experience design, interpretation and exhibition planning.

The same situation applies to the heritage sector, where in the 1980s and 90s, some local governments in China authorised travel agencies to operate officially protected sites. While this situation has improved, many sites across China still lack the necessary craftsmen, heritage conservation specialists, scholars and engineers.⁸⁴ This area also provides immediate opportunities for international collaboration through skills exchange, training and consultancy.

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http://www.xinhuanet.com/english/2018-03/13/c_137035525.htm
83
<https://china-outbound.com/editorial-ministry-of-tourism/>

84
https://www.getty.edu/conservation/our_projects/field_projects/china/tsinghua_conf.pdf

6.3 Case Study: The British Library, connecting through culture and learning

As part of an ambitious cultural exchange programme the British Library developed exhibitions, online learning resources and a knowledge exchange programme with Chinese partners. For the project the British Library brought three exhibitions to China over three years, working with the National Library of China, Shanghai Library and the Muxin Art Gallery.

To complement the offline exhibitions, the library launched a digital learning resource in Chinese on the Discovering Literature platform. The resource features digitised images of collection items as well as in-depth interpretative articles and multimedia content.

The British Library also set up official Chinese social media accounts on WeChat and Weibo to engage with Chinese audiences online. Articles published on both social media platforms increased visitors to the Chinese Discovering Literature website.

Throughout the project, the British Library organised a series of knowledge exchange programmes with partner libraries in both China and the UK to develop skills and share best practice. Since 2016, members of staff from 10 different departments of the British Library visited the National Library of China, Muxin Art Museum, Shanghai Library, Guangzhou Library and Hong Kong Central Library.

“The project raised the profile of British Library in China and that led to more collaborative opportunities such as touring exhibitions and IP commercialisation. In response, the library is developing a long-term, holistic strategy to ensure stronger synergy and mutually supportive growth across commercial, cultural and learning activities, including digital engagements in China to reach a broader range of partners and audiences.” Kai-Chuan Chapman, Lead, Cultural and Commercial Partnerships, China at The British Library

6.4 Digitisation of China's Heritage

In the context of rapid economic development, urbanisation and the growth in tourism, China is using technology to preserve and scale access to its heritage and to encourage tourism beyond the most popular destinations.

An example of this is the Traditional Chinese Village Digital Museum project, an online catalogue of over 6800 traditional Chinese villages. The project was launched in 2017 by the Ministry of Housing and Urban-Rural Development as part of an effort to preserve traditional villages. The project is managed by the China Academy of Urban Planning and Design (CAUPD).

The digital museum collects and catalogues the *“materials of daily life..., the history of a village's development, agricultural products and other artefacts that showcase the assets of a village”*.

The project uses VR/AR, 3D modelling and virtual tours to preserve and facilitate access to a village's artefacts.

According to the CAUPD, **“it is difficult to recruit enough professionals from multiple fields, such as sociology, economics, history, photography, animation and heritage preservation, to work on the project. A team specialising in the cultural history of a specific area and, at the same time, with a technical sense of digital representation is very rare.”**

The digitisation of China's culture and heritage is a promising area for international collaboration, with CAUPD specifically looking to collaborate with relevant technology experts, urban and heritage preservation specialists and relevant academics and educators.

6.5 Immersive exhibitions and installations in museums and commercial spaces

Chinese museums, galleries and shopping malls are using multimedia exhibitions and an appetite for visual technology to attract tourists and visitors. Audiences include many who would not usually visit a museum or pay for the experience. Young Chinese people and members of the new middle class are drawn by experiential exhibitions, considered more entertaining than the idea of ‘fine art.’

This is an area of high potential for international digital artists and producers of digitally enabled immersive installations and experiences. Examples of successful high-profile museum collaborations in this area include:

- Rain Room, produced by Random International, with the installation purchased by the Shanghai Yuz Museum in 2015 and subsequently taken on a tour of Asia
- In 2016 and 2017 Olafur Eliasson and James Turrell had major exhibitions hosted by the Long Museum, with tickets selling for over £20 GBP.
- teamLab, the Japanese immersive digital art collective, have exhibited all over China and have become a household name. Their work in China includes a permanent experience called Borderless in Shanghai⁸⁵ and exhibitions in Shenzhen and Beijing

“To adapt to the shift to online shopping, many Chinese shopping malls repositioned themselves by offering a wider range of entertainment” Lucas Wang, Artistic Director, Inside-Out theatre

China has the largest number of shopping centres in the world: over 4,000.⁸⁶ However, the traditional business models for those centres i.e. retail combined with cinemas and F&B, is becoming less attractive to consumers. To increase footfall, a proportion of the footprint of shopping centres is now dedicated to arts and culture. Digital and immersive art experiences are a potential driver for further growth in such shopping centres.

“There isn’t just one route to stage an exhibition, either in China or anywhere in the world. The partnerships Barbican has built with media agencies and commercial developers... can be just as valid and just as impactful as working with museums and galleries.” Neil McConnon, Head of Barbican International Enterprises, Barbican Centre

An example of a successful collaboration with property developers and shopping malls is the Digital Revolution exhibition by the Barbican. The exhibition toured a number of galleries and museums in Beijing and Guangzhou in 2018. For the tour, the Barbican was also invited by Hongkong Land, a property investment, management and development group, to join the launch of the high-end shopping mall.

6.6 Funding for arts residencies and exchanges

Many of the international exhibitions in China include big, prominent institutions and artists i.e. British Library, Barbican, V&A etc. Those larger institutions and artists have ‘brand-capital’ and resources that support and enable their work in China. For many smaller and less established institutions and artists, arts residencies and funded cultural exchange programmes offer an alternative route to working in China.

“At the moment, the Factory is not actively looking for international cooperation and presence but has allocated some resources to international exchange. A residency programme was launched in 2018, inviting seven artists and designers from the US, Japan, Europe and Hong Kong to discuss the materials, skills and theories.....The Factory hopes to identify further opportunities through international exchange.” Yuefeng Wang, CEO, Chengdu Lacquer Factory

There is a growing art residency scene in China with funding available for international artists. Beijing has the strongest arts residency programme in China, and in 2015 there were 16 programmes available for Chinese and international artists⁸⁷.

There are a number of platforms that track and collate arts residency opportunities and arts and culture exchanges programmes, including:

- The non-for-profit group China-Residencies provides an index of arts residencies programmes in China and related job opportunities.⁸⁸
- The platform Culture 360 managed by the Asia-Europe foundation, track and share arts and residency funding opportunities and cultural exchange programmes⁸⁹
- For the past ten years, the British Council has run the Connections through Culture funding programme to develop cultural collaborations between Chinese and UK artists and arts organisations.⁹⁰

⁸⁵
<https://borderless.teamlab.art/shanghai/>
⁸⁶
<https://retail.emarketer.com/article/china-glut-of-shopping-malls/59318504ebd4000b2ceae033>

⁸⁷
http://www.randian-online.com/np_feature/on-artist-residencies-in-china/#



6.7 Regional Focus: Contemporary Arts in the Beijing and Shanghai

There are more galleries and museums in Beijing than any other city in China.⁹¹ Many of these institutions work with international contemporary artists through commissioning programmes, exhibitions and shows. For examples:

- **UCCA Center for Contemporary Art** was one of China's first private museums for contemporary art, founded in 2007 at the heart of the 798 art district in Beijing. In 2018 UCCA presented "Sarah Morris: Odysseus Factor." This marks the first exhibition of the artist's entire filmic output anywhere in the world, set within a large installation comprised of paintings, drawings and a monumental wall painting specially devised for the centre's Great Hall.⁹²
- **M WOODS** is an independent, not-for-profit art museum founded in 2014 by collectors Lin Han and Wanwan Lei. The museum has presented the first institutional solo exhibitions in Beijing by artists such as David Hockney, Richard Tuttle, Nicolas Party and Paul McCarthy.⁹³
- **The CAFA Art Museum** is described as a "modern art museum that conducts academic research, presents exhibitions, restores artworks and provides art education." Originally called the Central Academy of Fine Arts Gallery, the gallery was the first private art museum after the establishment of the People's Republic of China.⁹⁴

Beyond exhibitions there is a growing art residency programme in the region with funding available for international artists. Beijing has the strongest arts residency programme in China⁹⁵ (see 6.6).

In 2018, the Shanghai government issued "Implementation measures on promoting the development of Shanghai's art industry". The measures support and incentivise cooperation with international artists and contemporary visual arts institutions, including:

- "Introduce world-renowned art institutions to open galleries in Shanghai and support local galleries.. to expand their brands overseas."

- "Support internationally famous art auction institutions to settle in Shanghai."
- "Expand the influence of art fairs. The world's top art fairs will be introduced to Shanghai, and internationally renowned institutions and artists will be encouraged to bring high-quality overseas art works to Shanghai."
- "Attract outstanding talents from home and abroad. We will work hard to attract a number of major artists and entrepreneurs with global influence... implement programmes to support young art talents, encourage galleries, art institutions and art fairs to provide young art talent with platforms for their creation and marketing services, and organise participation in important art fairs at home and abroad... implement the artist residency programme.. and invite well-known artists from home and abroad to create ...and support the construction of artist."

Over 20% of museums in China are private and Shanghai is home to some of China's largest and best-known private museums, particularly contemporary art museums. Private museums are often better resourced and equipped than public museums, boasting substantial collections by their owners. They are able to host international shows more often, and their flexibility means that they can bring in international and blockbuster high-profile exhibitions. Examples include:

- **Yuz Museum**, located along the Shanghai West Bund district, is a non-profit organisation under the umbrella of the Yuz Foundation and founded by Budi Tek, a Chinese-Indonesian entrepreneur and collector. The museum regularly hosts large scale exhibitions by contemporary artists from around the world.⁹⁶
- **The Long Museums** of Shanghai were founded by Mr. Liu Yiqian and his wife, Ms. Wang Wei. They hold the largest private collection in China. Past large-scale exhibitions with contemporary artists include Anthony Gormley, Louise Bourgeois, Olafur Eliasson.⁹⁷

6.8 Cultural Heritage and Tourism in the North

As per the provincial development plans for the Shaanxi and Gansu provinces (see 7.2), there are several world-renowned cultural heritage projects and sites in the north. Work is already underway with some of the leading international institutions to preserve and make available these sites for domestic and international tourists, and as an online resource. Development of these sites will open further opportunities for international collaboration.

Dunhuang: Located at the edge of the Gobi Desert and most famous for its Mogou caves, Dunhuang's cultural industry fuels the regions tourism industry. Examples of significant cultural heritage projects include:

- **The Silk Road Heritage City:** located in South West Dunhuang, this 1,000 acre project began construction in 2017 under the guiding principles of “One heart, One Core, Two Zones”. One Heart refers to a tourist information centre. One core refers to Dunhuang cultural industries zone, including a virtual park, animation themed park, self-drive vehicle base camp and an aerospace model education camp.⁹⁹
- **The International Dunhuang Project:** The Silk Road Online (IDP)¹⁰⁰: IDP is an international collaboration to create a visual, online catalogue of all manuscripts, paintings, textiles and artefacts from Dunhuang and archaeological sites of the Eastern Silk Road, and to encourage their use through educational and research programmes. Major IDP partners providing data include: The Library of the Hungarian Academy of Sciences, Budapest; The British Museum, London; The Victoria & Albert Museum, London; The Museum for Asian Art, Berlin and Guimet Museum, Paris.
- **Digital Dunhuang**¹⁰¹: Digital Dunhuang, led by Dunhuang Academy China, is an ongoing project to integrate the photos, videos, 3D data and other literature around the Dunhuang Grottoes and related cultural relics into a digital repository in both Chinese and English. The main website went online in 2016 and recorded nearly 3.5 million page views in 2017.

Xi'an is one of China's most famous heritage cities, mainly for its Terracotta warriors. 13 dynasties in China's history made Xi'an their capital, and it prides itself as the starting point of the silk road. The government designates Shanxi as the “*Designated Chinese Civilization Cultural History Base*”. Apart from being a bastion for archaeological research and discoveries in China, since 2010 there have been 17 additional national archaeological discoveries made in Shanxi. The area is also home to four national cultural heritage and protection research centres and the Technological Department of International Cultural Artefacts Cooperation base. This rich heritage invites opportunities for collaboration in Xi'an, including:

- **The Terracotta Army** is a collection of terracotta sculptures depicting the armies of Qin Shi Huang, the first Emperor of China. It is one of the most famous and visited attractions in China. In 2018 the Liverpool National Museum hosted an exhibition showcasing objects from the collection.¹⁰²

Beijing is China's cultural capital and in the Beijing City Cultural Development Plan published in 2016, the municipal government identified three key large-scale cultural heritage projects, including: The Great Wall Cultural Zone, The Great Canal Cultural Heritage Zone and the West Mountains Cultural Zone.¹⁰³

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<http://www.thelongmuseum.org/en/>
98
<http://powerstationofart.com>
99
<http://www.cinic.org.cn/whys/zx/493542.html>
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<http://idp.bl.uk/pages/about.a4d>

101
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<https://www.liverpoolmuseums.org.uk/wml/exhibitions/terracotta-warriors/>
103
http://www.ce.cn/culture/gd/201606/15/t20160615_12884420.shtml

6.9 Case-study: Wall2Wall Project

The Wall2Wall project is an international collaboration and knowledge exchange project between the Hadrian’s Wall in the UK and the Great Wall in China. The project was a result of a British delegation that visited China in 2016 under the UK-China People to People (P2P) dialogue. The project is a collaboration between Historic England and the China Academy of Cultural Heritage (CACH).

The aim of the project is to bring heritage experts from the UK and China together to deepen understanding, exchange knowledge and expertise and to boost tourism to both sites.

While Historic England and CATH lead the project, both opened their networks to bring in more partners across both countries. For example, the UK side includes Newcastle University and the National Trust. Consequently, the project enables the wider heritage sector to work collaboratively with their Chinese counterparts.

The ongoing project is a forum for knowledge exchange around techniques used for landscape analysis and opportunities for exhibitions that involve the wider public and local communities.

The open-ended nature of the project highlights the importance of establishing good relationships ahead of specific outputs.

“Build the relationship before you really go in and build mutual under-standing before you consider practical out-puts. International collaboration takes time to grow and personal relationships help. Be prepared to invest time and interest in your potential partners.” Charles Smith, Head of Region (North East and Yorkshire)

“Successful international collaboration comes from projects developed in the spirit of mutual benefit; ones which put sharing experience, knowledge and understanding at their core regardless of the subject matter.” Alexandra Warr, Head of International Affairs. Historic England

6.10 Cultural Heritage and Crafts in the South West

There is great emphasis on the preservation and cultivation of the South Western region’s cultural heritage and crafts. This is reflected in the Sichuan government’s 2018 *“Traditional Technology Revitalization Implementation Plan”*.¹⁰⁴ The intention is to revitalise traditional craft in the region; develop a network of traditional craft incubators or clusters; cultivate excellent “traditional craft artisans”; improve the income of practitioners; increase “urban and rural employment significantly” and to form a traditional craft industry with “Sichuan characteristics.” These policies and programmes in the region provide opportunities for international collaboration. Example events include:

- Chengdu hosts an International Festival of Intangible Cultural Heritage. UNESCO is a co-host of the festival, which happens every two years. For the past ten years, the festival has attracted practitioners from around the world. The aim of the festival is to explore best practice in safeguarding intangible cultural heritage through seminars, exhibitions, performances, presentations and a trade fair.¹⁰⁵
- In 2019, Chongqing will simultaneously host the International Intangible Cultural Heritage Town and Intangible Cultural Heritage International Design Week at the city’s Xiuhu Park. The events will launch permanent activities for international public cultural exchange in the Xiuhu Park to promote the city’s local and international cultural heritage status.¹⁰⁶

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http://www.ce.cn/culture/gd/201807/30/t20180730_29888449.shtml
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http://www.ihchina.cn/news_details/18414.html
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<https://www.ichongqing.info/arts-culture/intangible-cultural-heritage-town-a-place-to-encounter-the-history-of-chongqing/>

7. Regional Developments and Policies

There are over 20 provinces in China, a number of large-scale municipalities such as Shanghai and Beijing and semi-autonomous regions i.e. Hong Kong, Macau. Different provinces, municipalities and regions have their own unique cultures, economic development plans and cultural policies. The arts, cultural and creative industries vary vastly across the country.

Consequently, it is difficult to generalise the opportunities for international collaboration in a way that accurately captures broad variations across the country. In an attempt to provide a more accurate and focused view of activity, this guide provides an overview of policies and developments in four key regions, North Central, East, Greater Bay Area and South West.



This section will bring readers' attention to key areas of policy and activity in these regions and encourage readers to further explore opportunities in ways that are relevant to their work.

7.1 North Central



For the purposes of this guide we will focus on the following cities in the North Central region: Beijing and Xi'an, and also the following secondary cities: Dunhuang, Tianjin, Harbin.

7.2 North Central regional cultural development plans

Beijing

In 2017 the Beijing government issued the city's 13th five-year development plan for the culture and creative industries (CCIs). The overarching objective for the plan is to "create Beijing as a dynamic culture and creative city with influence on culture innovation, operation, exchange and experience" and to see the CCIs reach 15% of the city's GDP by 2020.¹⁰⁷

The development plan focuses on the following arts and culture sectors:

- **Arts and antiques:** "Promote the creation and production of traditional fine arts with Beijing characteristics"

- **Performance arts:** "Focus on supporting the creation of plays that can represent the regional cultural characteristics of Beijing"
- **TV and radio:** "make radio, film and television programmes more high-end"
- **Publishing:** "develop new forms of business such as green printing, printing on demand, and digital publishing"
- **Design:** "Encourage industry promotion organizations, cultural and creative industrial parks, industry associations and other units to build public service platforms for creative design... and expand the influence of Beijing as a design capital."

Shaanxi Province

Shaanxi province has an integrated development plan for the regions culture and tourism sectors for the period 2016-2020.¹⁰⁸ The plan focuses on building "a famous international and first-class domestic tourism destination". This includes: adding 150 Bn. CNY to the cultural economy; to receive over 600 M domestic and international tourists; to generate over 600 Bn. CNY in revenues from tourism and to employ over 200,000 in the tourism sector.

To achieve these aims the plan encourages "cultural and creative enterprises ...to create animation, game products, digital virtual tourist attractions and landscapes for tourism content, and to improve the technological content of tourism products, projects and routes."

Gansu Province

Gansu province's 13th five-year cultural industry development planning was issued in 2016 to support the development of the region's industries.¹⁰⁹ The objective for the plan is to see the "cultural industry become a pillar industry of the province's economy, making Gansu a unique cultural industry base and a new highland of modern cultural innovation in the west of China."

The plan focuses on the following sectors:

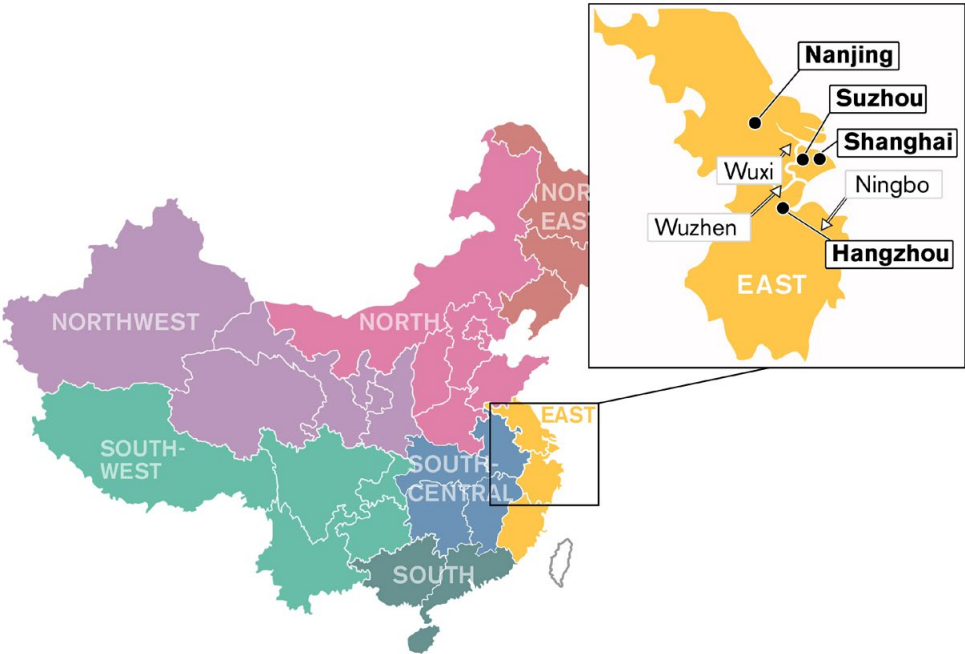
- **Television and radio:** "focus on supporting and launching a number of western genre films and a TV series based on the history and reality of Gansu province."

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http://www.ce.cn/culture/gd/201702/17/t20170217_20300551.shtml

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<http://www.xincheng.gov.cn/zcwj/news/show-78207.html>
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http://www.gansu.gov.cn/art/2016/9/1/art_4786_284968.html

- **Publishing:** “focus on Belt and Road and launch books with Gansu features; support the development of digital publishing.”
- **Arts and antiques:** “encourage skilled craftsmen, inheritors and entertainers of folk arts and crafts to follow the market-oriented path.”
- **Performing arts:** “support the development of art troupes and accelerate the construction of performing venues”
- **Heritage:** “increase the depth of connection between creative design and tourism and use the collection of resources to develop creative cultural souvenirs, cultural tourism souvenirs, and well-known cultural relics and imitation handicrafts.”

7.3 East



For the purposes of this guide we focus on the following primary cities in the Eastern region: Shanghai, Suzhou, Hangzhou, Nanjing and the following secondary cities: Wuzhen, Wuxi, Ningbo

7.4 East, regional cultural development plans

There is an overarching economic development plan that spans the eastern region called the “Development Plan for Yangtze River Delta City Group”. The plan was issued by the National Development and Reform Commission (NDRC) and covers 2015 to 2020.¹¹⁰ The plan aims to strengthen innovation in key areas of industry including the culture and creative industries by “accelerating the establishment of a modern public cultural service system.” The plan highlights the following sectors as key to the development of the regions cultural industries; performing arts, film and television, art education and training, design and publishing.

Shanghai

The cultural and creative industries is a pillar industry in Shanghai. In 2016, the added value of the cultural and creative industry reached 331 Bn. CNY, accounting for about 12% of the local GDP.¹¹¹

Shanghai’s 13th Five-Year Plan for culture reform and development (2016-2020) sets out the local government’s plan to position Shanghai as “China’s cultural centre and an international cultural metropolis”.¹¹² This includes developing Shanghai into the following: “Global film and TV Creation Centre”; “The Capital of Asian Performing Arts”; “Global Comics, Animation and Gaming Creation Centre”, “Leading role in China’s Internet Culture”; and “A Creative Design Centre with International Influence”.¹¹³

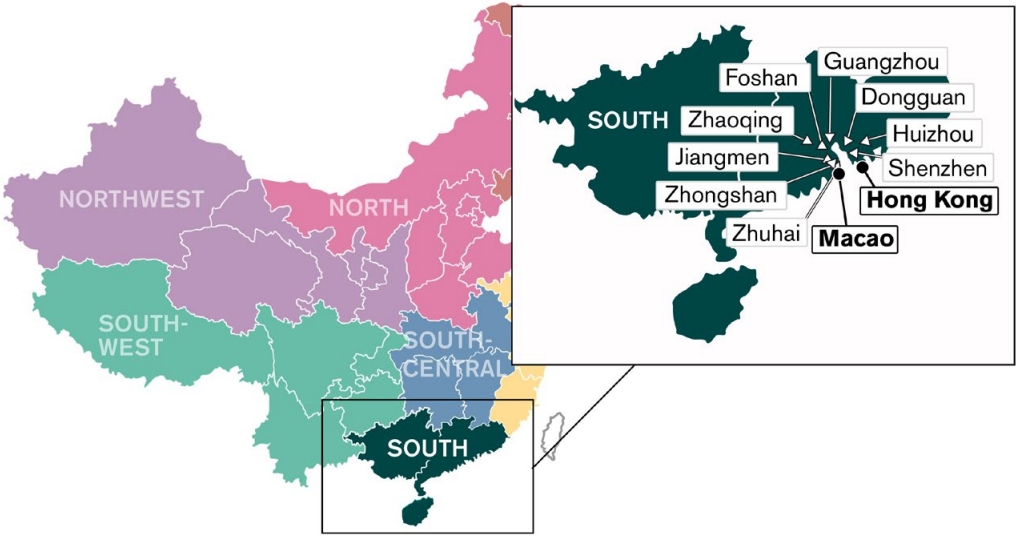
To achieve this, the government has developed policies to accelerate the development of the cultural and creative industries, focusing on the following sub-sectors: film and television; performing arts; animation and gaming; ‘Cyberculture’; creative design; publishing; ‘Art Trading’; and ‘Cultural Equipment’. As recently as August 2018, the government announced that an industry development and investment fund will be established to support those sectors.¹¹⁴

The target for these policies is to have the CCI account for 15% of the city’s GDP by 2022 and 18% in 2030.¹¹⁵

In accordance with the *One Belt, One Road* (OBOR) initiative, the Shanghai government is responsible for promoting Shanghai as China’s ‘international cultural trade base’, to strengthen cultural trade with countries along the OBOR.¹¹⁶

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<https://www.ndrc.gov.cn/>
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7.5 Greater Bay Area



The Greater Bay Area includes the Hong Kong Special Administrative Region, Macao Special Administrative Region, and nine cities in China’s Guangdong province including; Guangzhou, Shenzhen, Zhuhai, Dongguan, Huizhou, Zhongshan, Foshan, Zhaoqing and Jiangmen.

7.6 Development plan for the Greater Bay Area

The Greater Bay Area (GBA) is a defined economic region covering China’s south east and includes some of the wealthiest cities in the region. In 2019, the Central Committee of the Communist Party of China and the State Council formally issued an “Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area”, detailing an integrated economic and infrastructure plan for the area.¹¹⁷

The plan introduces the government’s intention “to improve the systems of public cultural services as well as the cultural and creative industries in the Greater Bay Area, nurture cultural talents, produce fine cultural works, encourage the vibrant development of the cultural market, and enrich the cultural lives of residents.”¹¹⁸

The plan details objectives for the development of culture in each of the key cities in the region, including:

- **“Hong Kong:** to serve as a platform for cultural exchange between East and West, and promote the fine traditions of Chinese culture”
- **“Macao:** development of cultural industries and cultural tourism, and a cultural exchange centre between China and Lusophone countries”
- **“Guangzhou:** the centre of Lingnan culture and a gateway for external cultural exchange”
- **“Zhongshan:** unearthing and promoting cultural resources related to Sun Yat-sen.”
- **“Jiangmen:** an important cultural exchange and cooperation platform for overseas Chinese”

The plan also highlights the key creative and cultural sectors to be developed, including:

- **Exhibitions and Performances of Lingnan Culture:** “Jointly launch cross-boundary programmes to protect key cultural heritage sites, co-organise different types of cultural heritage exhibitions and performance [and] make good use of the rich cultural relics ...of the Greater Bay Area.”
- **Performance Arts:** “promote exchanges among arts organisations and... schools for performing arts as well as cultural institutions and museums in the Greater Bay Area.”
- **Music industry:** “strengthen the development of a national base for the music industry, and promote the development of the music industry.”

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http://english.gov.cn/policies/latest_releases/2019/02/18/content_281476527605892.htm
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Reference: Chapter 8, “Developing a Quality Living Circle for Living, Working and Travelling”, Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area

- **Culture projects:** “support major new cultural projects such as the Hong Kong Palace Museum and the Xiqu Centre in the West Kowloon Cultural District and enhance the cultural charm of Hong Kong as a city where ‘East meets West’”.
- **TV and Film:** “support Hong Kong in attracting creative talents and consolidating its position as a creative capital by leveraging its world-renowned events such as the Hong Kong International Film and TV Market.”
- **Media, TV, publishing and film:** “promote the development of the media, publishing, radio, film and television industries in the Greater Bay Area.”
- **Design:** “support Shenzhen in bringing in international high-end creative and design resources, and vigorously developing its modern cultural industries.”
- **Digital Entertainment:** “promote regional cooperation in digital and creative industries such as animation, comics and games, internet culture, ...and promote the application of digital creativity in areas such as convention and exhibition, e-commerce, medical and healthcare, education services, tourism and leisure.”

While the development plan for the region and its cities is comprehensive and detailed, many of the cities within the GBA are already rich in culture and have an existing unique cultural ecosystem.

7.7 Culture and Creative Industries in GBA Cities

Hong Kong

Hong Kong has a mature culture and creative industry. From an economic perspective, the biggest cultural sectors in Hong Kong are publishing (\$12 Bn. HKD), antique and crafts (\$8 Bn. HKD), and the film, video and music (\$3.7 Bn. HKD).¹¹⁹

Besides GBA development, Hong Kong is already investing in the development of cultural infrastructure to enhance the city’s cultural offer. These developments represent an opportunity for international arts to come and collaborate with local partners. Hong

Kong is often seen as a gateway to mainland China due to its British heritage. Some major developments and projects include:

- West Kowloon Cultural District (WKCD) project is an important strategic investment of Hong Kong to meet the city’s long-term arts and culture infrastructural and development needs.¹²⁰
- “Entertainment Expo Hong Kong”, which takes place in March and April every year. It comprises 10 major events, including “Hong Kong International Film and TV Market”, “Hong Kong International Film Festival”, “Hong Kong Film Awards”, “Hong Kong Asian-Pop Music Festival”¹²¹
- The “Hong Kong Arts Festival”, organised by the Hong Kong Arts Festival Society, takes place around February and March every year. It is recognised as one of the most important international festivals in Asia.¹²²
- Art Basel in Hong Kong, held every year in March, sees galleries from around the world exhibit to audiences and buyers in the region.¹²³
- There are over 1,000 performing arts groups in Hong Kong, staging as many as 8,000 shows every year and attracting an annual audience of over 3 million.¹²⁴

Shenzhen

Shenzhen’s cultural and creative industries are linked to the city’s success as a technology hub for the region. Economically the CCIs account for 10% of GDP and the largest sectors are; creative design (23 Bn. CNY and includes product design, interior design, fashion design), animation and games (companies include Tencent, Global Digital Creations, iDreamSky, HuaQiang) and oil painting (4 Bn. CNY).¹²⁵

The Shenzhen government recognise the cultural and creative sectors as key to “build (an) international cultured city with high technology and industrial innovation.”¹²⁶

Shenzhen hosts some of the country’s leading design, creative and technology events. These events provide an opportunity to collaborate with international artists and creatives in areas of

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priority for the city. Shenzhen’s Design Week (SZDW), sponsored by the Shenzhen Municipal Government, takes place every year in late April. SZDW is one of China’s most prominent design events¹²⁷

Guangzhou

The culture and creative industries are already a key pillar of Guangzhou’s economy, accounting for almost 14% of the city’s GDP. The leading industries include: design, film and animation; video games and VR/AR. Like Shenzhen, Guangzhou has a rich ecosystem of technology firms that work in and with the culture and creative sectors.¹²⁸

The city’s emphasis on the integration of the arts and technology is highlighted by its support for the immersive technology and AR/VR sectors. The Guangzhou government has established an investor “guidance” fund, essentially a government backed investment fund, to encourage private investment in AR/VR businesses in the region and to incentivise international immersive businesses and researchers to establish a base in the city (see 4.4, 6.4 and 6.5).¹²⁹

7.8 South West



For the purposes of this guide we focus on the following primary cities in the South West region including: Chengdu, Chongqing and also the following secondary cities: Kunming, Guiyang.

7.9 Development plans for the south west

China launched its “China Western Development” strategy in 2000 to boost the economic development of 12 western provinces and cities including: Chongqing, Sichuan, Guizhou, Yunnan, Tibet, Shaanxi, Gansu, Ningxia, Xinjiang, Inner Mongolia, Guangxi and Qinghai. These places consist of a population of more than 400 million people.¹³⁰ This development plan covers the Chengyu City Cluster, one of the biggest city clusters in southwest China, including the cities of: Chongqing, Chengdu, Leshan, Luzhou, Mianyang, Nanchong, Yibin, Meishan, Ziyang, Deyang, Suining, Neijiang, Zigong, Yongchuan, Dazhou, Guang’an.

Chengdu

Chengdu is often referred to as China’s coolest city¹³¹ and arts and culture are central to the local government’s plan to develop the city. In 2019 the Chengdu government issued “The Decision of Advocating Chinese Civilization and Tianfu Culture to Build a World Famous Culture City”, where it listed the brand of “Three Cities and Three Capitals”¹³² which are “World Famous Cultural and Creative City, World Famous Tourism City, World Famous Competition City, International Capital of Food, International Capital of Music, and International Capital of Exhibition”¹³³. To realise this ambition the government proposed the following plans:

“build a creative industrial park of 8.8 million square meters”

- “add more than RMB 180 billion from the creative industry” and “bolster the industry’s contribution to GDP to approximately 12%”
- “create over 30,000 seats for indoor musical performances with an output of 57 billion RMB by 2020.”
- “hold over 1,000 exhibitions and conferences...with revenue of more than 15 billion RMB”

Alongside the plan to build a “world famous culture city”, the city also has a three-year plan to build a “world famous tourism city”. The city aims to receive over 3 Bn. tourists including over 4 M overseas tourists with revenues of 58 Bn. CNY from tourism.

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<http://sc.people.com.cn/n2/2019/0215/c379471-32640002.html>

This is in line with the national governments move to use culture to drive tourism (see 6.1).

Chongqing

Chongqing is China's largest city. The local governments 13th five-year plan for the cultural industry, aims to add 100 Bn. CNY to the city's economy with a focus on three "traditional sectors" and three "emerging" sectors.

Plans for the traditional sectors include:

- **Publishing:** "promote the digitalization of the publishing industry and "complete the commercialisation of publishing".
- **Television and Radio:** "promote online television and radio programmes and promote filming and photography"
- **Art and performing art:** "support the development of art and art education and promote art think tanks"

Plans for the emerging sectors include:

- **Creative design and advertising:** "promote the advertising industry, create an industrial park and hold advertising exhibitions and support the development of animation industry"
- **"Manufacturing of culture related products":** "support printing and production of stationary, instruments, and performance related facilities"
- **"Internet based culture service":** "support the development of information and internet services and online media."



Photo by Brady Bellini

8. Additional considerations

There are many areas of opportunity in China for collaboration between international arts and culture practitioners. This guide highlights the key areas and regions of opportunity. However, there are also additional considerations that stakeholders need to understand before working in China that are applicable across all areas of activity. This section introduces some of these additional considerations.

8.1 Understanding cultural differences and differences in business practices and policies

This guide has highlighted some of the many opportunities for artistic and cultural collaboration with China. Often international artists and businesses can come to China hoping for a “quick-win” and to simply “export” existing work and practices. Successful collaborations emerge from a deep level of understanding between collaborators.

Many of those consulted for this guide stressed the importance of understanding the different cultural and businesses practices.

“A real collaboration requires concession from both sides to reach a compromise, not asking one side to adapt to another’s habits... In late 2019, Inside-Out Theatre will present a newly interpreted Frankenstein with British artistic director Daniel Goldman, which would be the fourth time for the theatre to work with a foreign artist.... Goldman was invited because of his long-term working experience in Latin America, which indicated his openness for different cultures and the ability to maintain successful cooperation across different cultures.” Lucas Wang, Artistic Director, Inside-Out theatre

While language barriers are becoming less of an issue, different cultural and working practices remain.

“As we see more young people speaking fluent English, many with experience studying abroad, become middle-level managers, the language gap is no more a pressing barrier as it was a few decades ago though it could still be an issue in areas with fewer talents of international education background and experience.” Lynn Fu, independent performing arts programmer, curator and consultant



Photo by Fay Lee

“The UK and China are much different in terms of culture, custom, policy, market and law. When coming to China, the UK organisations, while upholding their values, sometimes would need to be more flexible and adapt to the local regulations and circumstances, which might be different from city to city.” Nick Rongjun Yu, Vice President of SMG Performing Arts Group, Manager of Shanghai

“Consider if the topics of your work/speech are politically sensitive before commencing any work. Consult local partners if you cannot be sure. The emphasis on political correctness has been more significant in recent years. It’d especially worth attention when working with public institutions, including universities and museums.” Xu Jia, Curator, Hangzhou Triennial of Fiber Art

A first step to working in China is familiarising and embracing the different cultural and working practices in the country and in any specific region. This includes understanding the policies and existing industry context in the relevant artistic practice and sector.

8.2 Find suitable partners

While China offers many opportunities for international collaboration, there are still a number of barriers to working in the country. Policies and practices can appear opaque from the outside. Relationships with and an understanding of the government’s role across all areas of industry in China is difficult for international collaborators to manage directly.

“Come to China, conduct field studies of the market. There are more and more organisations in China looking for international collaboration while it could be difficult to tell their reliability and professionalism. Collaboration with state-owned companies could guarantee higher credibility, but it often comes with limited experience in international cooperation, more regulations and less flexibility.” Nick Rongjun Yu, Vice President of SMG Performing Arts Group; Manager of Shanghai

The success of any proposed collaboration will rely on productive, trusting and sustainable partnerships. Successfully working in China is contingent on maintaining relationships and good ‘guanxi.’¹³⁴

“An experienced and professional Chinese partner is key to success. To identify suitable partners, it’d be helpful to have professionals curating bespoke research tours for British organisations.” Lynn Fu, independent performing arts programmer, curator and consultant

Finding a suitable partner in China and establishing a long-term mutually beneficial relationship is essential. This guide highlights the opportunities to finding suitable partners through festivals, residencies and exchange programmes (see 4.3, 5.1 and 6.6). Carrying out due diligence on any potential partner is important but language differences and a lack of transparent business information makes sourcing relevant information pertaining to individuals, companies and institutions more complicated. It is important to move cautiously, and where possible work with supporting services like the British Council to verify potential partners.

“The endorsement from government and official institutions could play a significant role in facilitating international collaboration in China, as the Chinese generally value official titles/ranks.” Yuefeng Wang, CEO, Chengdu Lacquer Factory

Just as it is difficult for an international partner to find a suitable partner in China, it is equally difficult for a Chinese partner to find and validate an international partner. Again, working with supporting services like the British Council and obtaining relevant endorsements are important to providing both sides with the confidence they need to proceed with a partnership.

8.3 Shopping malls and property developers are important cultural stakeholders

One of the key characteristics of economic development in China over the past few decades has been the speed and scale of urbanisation. By the end of 2017 almost 60% of the total population lived in urban areas, an increase from 18% in 1978.¹³⁵

Private and state-owned property developers have prospered during that period. These developers are also responsible for the surge in cultural infrastructure development in China. For example, to obtain permission to develop in certain cities and regions, developers must commit to increasing the availability of culture for a local community. This typically results in the development of a new theatre or museum alongside any new residential and commercial development.

Property developers also develop, own and maintain many of the entertainment provisions in any city or region. For example, as of 2016 the Wanda Group were the largest film exhibitor in China owning over 2,700 screens and 310 cinemas.¹³⁶

The traditional business models for shopping malls i.e. retail combined with cinemas and F&B, is becoming less attractive to consumers. To increase footfall, a proportion of the footprint of shopping centres are dedicated to arts and culture (see 6.5). Indeed, property developers also programme and operate art festivals to increase the vibrancy to an area and to generate income.

“There are some professional theatrical venues within shopping malls that would welcome open-minded British artists.” Lucas Wang, Artistic Director, Inside-Out theatre

Consequently, property developers have a unique status in China’s arts ecosystem and are useful partners for international artists and producers looking to work in China.

8.4 Supporting services and skills, not just content

This guide has underlined the massive growth in demand for arts and cultural products in China, and the associated boom in the development of cultural infrastructure across the country, both of which open doors for collaboration with international artists and practitioners.

“about 99% of theatres in China are just venues, infrastructure without personnel that need to find specialised partners for each project.” Lucas Wang, Artistic Director, Inside-Out theatre

However, it is important to note the breadth of the opportunities for collaboration across the entire arts and culture ecosystem, which go beyond content and infrastructure. For example, professional development training (see 4.2 and 6.2), and specialised technical services (see 6.4) are also in demand.

“The UK, with a profound reputation in literature and theatre production, has tremendous opportunities in scripts (e.g. Chinese translation), theatrical techniques and management collaboration.” Lucas Wang, Artistic Director, Inside-Out theatre

The UK has a mature industry of specialist agencies and service providers across all areas of arts and culture. As this guide highlights, China provides an abundance of opportunities for these agencies and providers.

8.5 “Going-out”, supporting Chinese partners to reach international audiences

Internationalising and exporting Chinese arts and culture is part of the government’s “*Going Out*” strategy, which became part of national policy in 2011.

Successful internationalisation of Chinese culture is important for the development of the domestic industry. International collaborations and co-productions are important to help Chinese artists and producers develop and to support the development of the domestic sector more broadly.

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https://res.mdpi.com/sustainability/sustainability-10-02953/article_deploy/sustainability-10-02953.pdf?filename=&attachment=1
¹³⁶
<https://www.hollywoodreporter.com/behind-screen/wanda-opens-first-dolby-cinema-905453>

The internationalisation and “going-out” of Chinese culture also enables the government to preserve and project its strategic and ideological interests.

“In some cases, SMG works with an independent British production studio rather than the whole team behind a theatrical performance. For example, 59 Productions helped to bring *The Last Warrior Elephant* to life in 2019. Adapted from Shen Shixi’s famous story of the same name, the work demonstrated the desire to show Chinese stories to international audiences.” Chenlin Zhao, Market Director, Shanghai Media Group (SMG)

In order to be successful and sustainable, it is recommended that collaborations with Chinese partners should also explore opportunities to support Chinese culture to “go-out” and be made accessible internationally.



9. Acknowledgements

9.1 British Council

The British Council is the UK's international organisation for cultural relations and educational opportunities. We create friendly knowledge and understanding between the people of the UK and other countries. We do this by making a positive contribution to the UK and the countries we work with – changing lives by creating opportunities, building connections and engendering trust.

We work with over 100 countries across the world in the fields of arts and culture, English language, education and civil society. Last year we reached over 80 million people directly and 791 million people overall including online, broadcasts and publications. Founded in 1934, we are a UK charity governed by Royal Charter and a UK public body.

We operate as the Cultural and Education Section of the British Embassy in Beijing and Cultural and Education Section of the British Consulate-General in Shanghai, Guangzhou and Chongqing. Our Exams work operates as Wholly Foreign Owned Enterprises.

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9.2 Authors

BOP Consulting is an international research and strategy firm specialising in culture and the creative industries. We combine top-class research and analytical skills with an in-depth knowledge of the creative economy. We work with national and city governments, support agencies and cultural and creative businesses – we know how to use public and private resources to create supportive environments for the sector. Many of our projects result in published work, which is of the highest editorial quality and effectively targeted at policy-making and/or business audiences.

Our China operation was established in 2013 and focuses on supporting international businesses and governments to grow their cultural and creative activities in China. We understand both the political context and practical realities of doing business in China.

Through our work in China, we provide the following support and services:

- Inward Trade Promotion Strategies for Culture and Creative Industries in China: we advise government agencies on how to best drive growth in exports and trade with China.
- Market intelligence: we provide on-the-ground, contextual and expert intelligence on the culture and creative industries in China, specifically in the following sectors and sub-sectors: visual arts and heritage, live entertainment, film and video, IP and licensing.
- Practical Market Entry Advice for Cultural and Creative Businesses: we work with commercial clients to localise their products for China, find the right partners and navigate local policies, regulations and customs.

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Additional research by Summer Fu, Xinyue Jiang and Lei Bing

www.bop.co.uk/china

9.3 Consultees

For this work we consulted and interviewed the following organisations and experts in China's arts and cultural industries. We would like to thank them for time and contribution.

- [Alexandra Warr](#), Head of International Affairs, Historic England
- [Charles Smith](#), Head of Region (North East and Yorkshire), Historic England
- [Chenlin Zhao](#), Market Director, Shanghai Media Group
- [Jingwen Fan](#), Assistant Director of Film Competition & Programming Department, Shanghai International Film Festival
- [Kai-Chuan Chapman](#), Lead, Cultural and Commercial Partnerships, China, The British Library
- [Lynn Fu](#), independent performing arts programmer, curator and consultant
- [Lucas Wang](#), Artistic Director, Inside-Out Theatre
- [Marina Guo](#), Head of Arts Management programme, School of Creative Studies, Shanghai Theatre Academy
- [Neil McConnon](#), Head of Barbican International Enterprises, Barbican Centre
- [Nick Rongjun Yu](#), Vice President of SMG Performing Arts Group, Manager of Shanghai
- [Official from China Academy of Urban Planning and Design](#)
- [Official from Commerce and Economic Development Bureau](#), Government of Hong Kong
- [Ting Xu](#), Secretary-General, Shenzhen City of Design Promotion Association
- [Xiaoxue Tian](#), Digital Content Manager, British Library
- [Xu Jia](#), Curator, Hangzhou Triennial of Fiber Art
- [Yuefeng Wang](#), CEO, Chengdu Lacquer Factory

