Grounded in Heritage:

An Exploration of Traditional Cultural Clusters in China

– The Case of the Jingdezhen Porcelain Cluster

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A thesis submitted for the degree of

Master of Commerce

at the University of Otago, Dunedin

New Zealand

January 2011
ABSTRACT

“Grounded in Heritage” is a Master’s project derived from part of the researcher’s Post-Graduate Diploma research based on the Jingdezhen porcelain cluster, which challenges Michael Porter’s “Competitive Advantage of Nations” model as well as investigating whether Western cluster theories are applicable to Chinese traditional cultural clusters, and how Chinese traditional cultural clusters will contribute to cluster research as a whole. Jingdezhen porcelain is an icon of Chinese traditional culture clusters, with a recorded history of over 2,200 years. “Chang Nan” – the ancient name of the city – was pronounced by foreign buyers as “china”, indicating the importance of the products of this cluster in creating the world’s image of China. In comparison, the earliest cluster example presented in Porter’s book *Competitive Advantage of Nations* (Porter, 1990) has a history of only about 400 years. When considering the duration of its history and the uniqueness of Chinese culture, deeper research into the Jingdezhen porcelain cluster is expected to contribute to the current body of knowledge regarding clusters.

In order to reveal the characteristics of the entire porcelain cluster, including aspects such as the business environment, business network, business operations, coordination techniques, and production procedures, Grounded Theory is employed. Grounded Theory is considered to be the most rigorous suitable analysis method, freeing researchers from theoretical restrictions while aiming for a more holistic view of the research target. Research methods complementary to Grounded Theory were utilised for data collection: interviews, observation, field notes, and historiography. Due to the complexity of this project and the multiple research methods employed, the data is classified into divisions. The main data library for Grounded Theory is compiled from three streams of first hand data: interviews conducted in Beijing; interviews conducted in Jingdezhen; and field notes from both places. The data collected through historiography is subsumed into “extant literature” (see Figure 9). The three sets of data in the data library are inter-dependent and are coded separately; therefore, the examination of theoretical saturation is not only confirmed by its own stream, but also examined by data from historiography.

Thirteen key categories arise from coding of the data. From these categories, nine distinctive figures are generated based on eight categories with the five remaining categories leading to five conceptual findings, all presented in Chapter Five. Due to the novel approach taken to Grounded Theory, this project also presents a contribution in the application of Grounded Theory in industry and cluster research, as well as combining a variety of research methods together with Grounded Theory. The findings extend but do not conflict with classic cluster literature, and include outcomes specific to the cluster examined. Limitations and potential future research are discussed at the end of this report.
PREFACE

The production of this thesis relied on the efforts of my supervisor, André Everett, who provided supervision over the five years following completion of my undergraduate studies until now, in the areas of knowledge management, methodology, thesis crafting, information technology, and life guidance, with support from his library. I also thank Yujin Baskett for being my editor, who accepted the challenge when I had a difficult time finding one.

I am also thankful for the support of my mum Sun Jianhui, father Zhuang Guoyi, and brother Stanley.

Thank God!
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CHAPTER ONE: INTRODUCTION

This chapter is divided into four sections and will focus on the purpose of researching clusters in traditional Chinese industries, and how this research was carried out. The first section explores the urge for traditional culture in China with a brief social chronology of what has happened over the past 100 years, what had been transformed in the past 30 years with the “Reform and Opening Up” policy and what is expected for the future. Chinese culture is relevant not only for mainland China, but influences a broader region covering East and South-East Asian countries. Section 1 also covers current cluster studies and identifies research gaps involving traditional cultural clusters. Section 1.2 discusses the core terminology of cluster research, introducing definitions of the term “cluster” and “traditional cultural cluster” as used in this thesis. Section 1.3 covers methodological considerations, with a more thorough discussion of these considerations being explored in Chapter Three. The last section of this chapter, 1.4, is about the choice of venue(s) and why the porcelain cluster in Jingdezhen was the best choice for this research project. The relevant characteristics of Jingdezhen are also presented in Chapter Three. At the end of this chapter, the structure of this thesis will be outlined.

1.1 How Recent History Led to Calls for Traditional Culture Restoration in China

On 19 December 2008, marking the 30th anniversary of China’s “Reform and Opening Up” policy, a national meeting was held in the Great Hall of the People in Beijing. It attracted crowds of journalists from the United Kingdom, France, Japan, North Korea, the United States, and many other countries to commemorate this special moment in China’s history (China News, 2008). The world is talking about China more than ever; not just because its population of 1.33 billion people (CIA, 2009) makes up more than a fifth of the world’s total (CIA, 2009), but also due to the continuous rapid economic growth experienced since implementing the reform policy. The most notable indicator of this is the average of nearly 10 percent growth in gross domestic product (GDP) per annum (Gabriel, 2006) for almost 18 years (Index Mundi, 2009, Chinability, 2009). China is renowned as ‘the world’s factory’ (Zhang, 2006) and is now the top exporter in the world (Bradsher and Judy, 2010).

Some scholars have praised its reform process and consider China as the powerhouse or ‘new engine of the world economy’ (Garnaut and Song, 2003). However, just as each coin has two sides, there have been negative impacts of China’s progress of modernisation and industrialisation. Many scholars have started questioning the sustainability of China’s economic model in relation to its society, focusing on issues such as the environment (Garnaut and Song, 2004, Tubilewicz, 2006).

The damage caused by over-industrialisation has affected both the natural environment and cultural heritage. For example, China’s capital Beijing used to have a huge number of
architectural complexes called *si he yuan* (quadrangle) and *hutong* (ancient alley way). They are the only existing imperial civil architecture in China (Luo, 2001). However, 1500 *hutong* disappeared from 1980 to 2000, leaving only a few hundred (Yang, 2005). Although China has committed to the Convention Concerning the Protection of the World Cultural and Natural Heritage, initiated by the United Nations’ Educational, Scientific and Cultural Organisation (UNESCO) in Paris 1972 (UNESCO, 2009b, Wikipedia, 2009c), it still could not balance the business profits from tourism with a commitment to continuous protection and renovation of sites on the world heritage list. An increasing number of historic towns and heritage sites are now endangered, such as the Mogao Caves and Mount Taishan (People's Net, 2006).

Such disregard of cultural heritage among the Chinese has been nurtured in the transformation of people’s minds during the past 60 years of industrialisation; their perceptions, priorities and attitudes towards China’s traditions. An external cause could be the abrupt shift from a feudal system to democracy, and then to communism. An internal cause could be the severe conflicts between traditional Chinese philosophies (e.g. Confucianism and Taoism) and communist education and practices. During the first 30 years under communism, China copied the industrialisation model of the then Soviet-Russia and over-stressed the development of heavy industries, disregarding the need for complementary industries and agriculture (Renwu Magazine, 2006). The needs of the general public for consumable products were not satisfied. During that period, there were many major strategic mistakes, including the “Big Push”, “Great Leap Forward”, and “Great Proletarian Cultural Revolution” (Wikipedia, 2009b). These political errors, especially during the Cultural Revolution, encouraged cheating, enmity, jealousy, selfishness, treachery, lying, rebellion, distrust, and disobedience to parents. The bourgeoisie and educated people (including artists) experienced cruel persecution, with over 3 million dying in the violence of the Cultural Revolution (Chang and Halliday, 2005). Many antiques were destroyed, and many historic sites representing traditional Chinese culture were damaged (Wikipedia, 2009a).

Following implementation of the “Reform and Opening Up” policy in 1978, the world was given the chance to enter China and China gained access to the world, creating significant new opportunities for businesses and green fields for entrepreneurs. During this time, the common interest of the majority of Chinese was how to make money; only a small proportion of people understood and appreciated the value of historic cultural heritage and tradition. Following 30 years of the “Reform and Opening Up” policy, people’s standard of life has improved significantly. The composition of industries being developed has adjusted, with light industry drawing more attention. The country has started to balance the production of capital goods and consumption goods (HUST, 2009). International trade has boomed. After the general populous reached a decent standard of living, they started to enjoy more recreation time and activities and to seek spiritual satisfaction. According to Maslow’s Hierarchy of Needs (Simons et al., 1987), this is logical. Traditional culture returned to people’s lives.
However, the discontinuity and disregard of traditional culture as well as the majority of outstanding artists being persecuted to death during the Cultural Revolution has resulted in the loss without record of much of the traditional cultural arts. Due to its low visibility, the intangible traditional cultural heritage is still shrinking with a stronger momentum than the tangible heritage. In other words, since the 1940s, traditional arts have been dying while the mechanical industries have boomed (Shu, 2008).

In 2003, UNESCO adopted the Convention for the Safeguarding of the Intangible Cultural Heritage (UNESCO, 2009a). This convention entered into force on April 20th, 2006, and stated that: “Many elements of the ICH (Intangible Cultural Heritage) are endangered, due to effects of globalization, uniformization policies, and lack of means, appreciation and understanding which – taken together – may lead to the erosion of functions and values of such elements and to lack of interest among the younger generations.”

Over the past ten years, China has become more sensitive to protecting its national heritage. Since 1997, it is aligned with UNESCO in the proclamation of Masterpieces of the Oral and Intangible Heritage of Humanity (UNESCO, 2009a). In 2006, the Chinese National Academy of Arts established the Centre of Intangible Cultural Heritage Protection in China (CICHPC) (Chinese National Academy of Arts, 2009). The Centre comprises of nine divisions in total: Folk Literature and Language, Music, Dance, Drama, Quyi (Chinese Opera or Chinese folk art forms including ballad singing, storytelling, comic dialogues, clapper talks, cross talks, etc. (CNTA, 2009)), Fine Arts, Handicrafts, Traditional Medicine and Folk Art (IHCHINA, 2009).

The Experts Committee consists of 68 experts and artists from a variety of fields. Because of the high degree of national and international support it received, the term “Intangible Cultural Heritage in China” soon became a brand denoting quality intangible cultural heritage. This fame has translated into commercial profit, mainly from increased recreational activities and tourism.

Aside from gaining direct profit from traditional cultural arts and activities, there is a huge unexplored pool of indirect spiritual value arising from traditional cultural practices. Traditional culture is not only about the survival activities of ancestors, but also knowledge, value, and meaning – the fruits of wisdom derived from their daily practice (Kong, 1997). Landmann (Landmann, 1974) states that individuals must take up their relevant cultural heritage and climb over it to achieve personal development. To achieve full development, the only way is to live in a convergent society that takes tradition into account.

In early 2009, Sohu (a major Chinese internet portal) initiated the “2009 New Perspective Summit Forum” around the theme of “Back to the Innocent Age” (Sohu, 2009b). It attracted many active economists, entrepreneurs, sociologists, politicians and media talents to discuss the future of China’s reforms and opening-up. Wu, a former ambassador, took the example of Sanlu milk powder and questioned the whole system of credibility in China. He suggested
that in order to build up the credibility system, China needed to return to its traditional culture, as it was culture that underlies the credibility system (Sohu, 2009c). Xu (Sohu, 2009a) pointed out that the ‘four modernisations’ accomplished over the past 30 years are actually modernisations based on desire, consumption, material, and affluence. Xu claimed that the Chinese people are spiritually lost, with a strong nihilistic influence, and argued that innovation without tradition is not innovation.

The creativity of contemporary Chinese has become a major concern of the intellectuals (Tillman, 2005). They are worried about culturally innovative industries not obtaining enough insight from their traditions. Among all cultural heritages, intangible cultural heritage is the most “magical”, with the possibility to generate enormous benefits (CQNEWS, 2007). Regarding the key question of “How to industrialize traditional culture and create industrial value”, Hu Xiaowu, a researcher from the China Academy of Social Sciences Department of Literature Research, commented that the wellspring of innovative industries in China is its traditional culture. The richness of ethnic features and cultural ingredients is embedded in China’s civil history of more than 5000 years. In order to create a Chinese style of innovative products and cultural brands, the only way is to explore these cultural deposits properly and recreate Chinese cultural ingredients (China Investment Consulting Net, 2008). From the finance sector, Li Yong, the general manager of the Investment Department of the Industrial and Commercial Bank of China, said that there are two regrets in the past thirty years of reform policy; both regarding the innovative capability of Chinese financial enterprises (Li, 2008). Innovativeness and creativity has become more and more crucial in the world’s economy. They are at the centre of national development strategies (Wen, 2009, Porter, 1990). For China, traditional culture is the key to upgrading its innovative capability.

The importance of studying Chinese traditional culture is not just limited to benefits for mainland China’s economic and social development. Chinese culture has a great influence in Japan, Korea, Taiwan, Hong Kong, Macau, and countries with a big proportion of Chinese migrants such as Singapore, Malaysia, Indonesia and the Philippines. In fact, the aforementioned countries have kept more traditional practices than mainland China as they lack communism’s impact. Japan in particular is advanced in many areas of Chinese cultural studies. Japan is an ideal model in many aspects for China’s traditional culture reformation in the era of modern civilisation. China needs leaders like Yanagi Soetsu, the founder of Japanese Mingeikan (Folk Crafts) Museum, who stood up to lead Japanese cultural reform by creating the Mingei (Folk Art) Movement in 1926 (Wikipedia, 2009e, Mingeikan Museum, 2009). His representative masterpiece, The Unknown Craftsman (A Japanese Insight into Beauty), expresses the Japanese way of viewing and appreciating arts. He clearly explained the necessity of traditional arts and crafts to the whole society (Shu, 2008). China must stand on such shoulders to gain a better understanding of its own past.

From a more practical perspective, the development pattern of contemporary China under communist governance has been quite different from that of the countries mentioned above.
In order to gain a better understanding of itself, China needs to explore its existence with a decent understanding of the past; discovering what has been lost in the industrialisation process, recreating it, and planting the seeds of the past in its development strategies for the future (Zhuang, 2008).

1.2 Terminology

A cluster is “a geographically proximate group of interconnected companies and associated institutions in a particular field, linked by commonalities and complementarities (external economies)” (Porter, 2008). This is by far the most popular definition of “cluster” in the management field.

What does the word “cluster” mean literally? An overview of different editions of dictionaries and different fields in cluster research e.g. medicine, computer sciences, music, astrophysics, chemistry, can provide a more comprehensive understanding of the concept by examining it from different angles (Wikipedia, 2008).

Table 1: Definitions of Cluster

<table>
<thead>
<tr>
<th>Source / Date</th>
<th>Definition</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambridge Dictionaries Online (2008)</td>
<td>Cluster is a group of similar things that are close together, sometimes surrounding something.</td>
<td>Group, similarity, proximity, and relative position to a hub</td>
</tr>
<tr>
<td>Cluster Builder (2008)</td>
<td>A computer cluster is a group of loosely coupled computers that work together closely so that in many respects they can be viewed as though they are a single computer. Clusters are commonly, but not always, connected through local area networks. Clusters are usually deployed to improve speed and/or reliability over that provided by a single computer, while typically being much more cost-effective than single computers of comparable speed or reliability.</td>
<td>Group, coupled, proximity, unity, connection, local network, acceleration, improve consistency, and cost-effectiveness</td>
</tr>
<tr>
<td>Foldoc Free On-line Dictionary of Computing (2008)</td>
<td>Cluster is 1. Multiple servers providing the same service. The term may imply resilience to failure and/or some kind of load balancing between the servers. Compare RAIS. 2. An elementary unit of allocation of a disk made</td>
<td>Size, similarity in specialisation, improve resilience, and group</td>
</tr>
<tr>
<td>Source</td>
<td>Definition</td>
<td>Characteristics</td>
</tr>
<tr>
<td>---------------------------------------------</td>
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</tr>
<tr>
<td>Harvard Business School Website (2008)</td>
<td>Clusters are geographic concentrations of interconnected companies, specialized suppliers, service providers, and associated institutions in a particular field that are present in a nation or region. Clusters arise because they increase the productivity with which companies can compete.</td>
<td>Proximity, connection, specialisation, location, productivity,</td>
</tr>
<tr>
<td>Longman (2003)</td>
<td>Cluster is 1 a group of things of the same kind that are very close together. 2 a group of people all in the same place.</td>
<td>group, similarity, proximity, and location</td>
</tr>
<tr>
<td>Medical Dictionary, Merriam Webster Online Dictionary (2008)</td>
<td>larger than expected number of cases of disease (as leukaemia) occurring in a particular locality, group of people, or period of time</td>
<td>Size, location, group, and time frame</td>
</tr>
<tr>
<td>Merriam Webster Online Dictionary (2008)</td>
<td>Cluster is a number of similar things that occur together: as a: two or more consecutive consonants or vowels in a segment of speech b: a group of buildings and especially houses built close together on a sizable tract in order to preserve open spaces larger than the individual yard for common recreation c: an aggregation of stars or galaxies that appear close together in the sky and are gravitationally associated d: a larger than expected number of cases of disease (as leukaemia) occurring in a particular locality, group of people, or period of time.</td>
<td>a: size, similarity, location, b: group, proximity, to preserve a larger common space, c: aggregation, proximity, inter-gravitation, d: size, location, group, and time frame</td>
</tr>
<tr>
<td>Wikipedia (2008)</td>
<td>In science: cluster is a small group of atoms or molecules</td>
<td>Size and similarity</td>
</tr>
<tr>
<td>Wikipedia (2008)</td>
<td>In astrophysics: groups of stars which are gravitationally bound</td>
<td>Inter-gravitation</td>
</tr>
<tr>
<td>Wikipedia (2008)</td>
<td>In genetics and biotechnology, a cluster may refer to a group of closely gathered genes within a chromosome.</td>
<td>Group, proximity, similarity, and location</td>
</tr>
<tr>
<td>Wiktionary (2008)</td>
<td>In music: cluster means a chord of three or more notes</td>
<td>Size, harmony</td>
</tr>
</tbody>
</table>
According to all the definitions concerning clusters, there are shared characteristics among different forms of clusters. These include a degree of interaction and integration, with units within a cluster sharing a degree of similarity and closeness. Historical clusters have a long, recorded history that can be traced. Cultural clusters can represent or reveal the spirit of the society in a form of social being. The reason why historical cultural clusters are investigated in this thesis was addressed in the previous section. The author’s personal involvement with this project is described next.

1.3 Personal Methodology Statement and the Nature of This Project

This section identifies the personal statement of the researcher regarding preference of methodology. It includes a discussion of ontology and epistemology, quantitative and qualitative research, Grounded Theory and the use of literature in Grounded Theory.

1.3.1 Ontology and Epistemology

Before outlining the research method selection, it is worthwhile to declare the ontology of the researcher which will be the guiding principle for later research design, data collection, analysis and discussion. Ontology influences the perception of the researcher, and dictates the research style and direction.

Discussions on ontology in different academic fields use different terminologies. Even within one branch of a study, e.g. Commerce or Management, ontological orientations differ. Some scholars classify ontology as positivism: interpretive and critical. Each has its own unique perspective on the reason for research, perception of social reality, nature of human beings, understanding about common sense, researching style, importance of values, etc. However, methodology is an emerging discipline, and the understanding of ontology and epistemology in particular are subject areas being continually updated and renewed. This concerns not only about understanding research, but also understanding researchers and how they carry out their research.

Ontology and epistemology originate in sociology and philosophy, with great thinkers such as Immanuel Kant, Carl Marx, Max Weber, and Émile Durkheim contributing a lot to these ideologies. Based on research characteristics and values regarding life and science, methodology became an independent and interdependent subject.

Although different schools have different classifications of ontology, generally there are two classes: Nominalism (Interpretivism) and Realism (Positivism). Nominalists (Interpretivists) believe the world does not have a real structure, that structure varies according to individual interpretation and understanding, that there is no absolute truth, but that truth is relevant to each individual’s situation and explanation (contextually dependent truth). Claiming the opposite, Realists (Positivists) believe that there are facts and truth, and that such facts and
truth exist no matter whether people believe in them or not. Consequently, the social world is as hard and concrete as the natural world (Burrell and Morgan, 1979).

Nominalist researchers focus on individual experiences and feelings. They focus on what people experience and are not interested in independent reality, but in the reality that people perceive or experience. Based on this research and the researcher’s understanding of the world, facts exist beyond human experience. If such facts are relatively true, then it will be very hard to research historical events or phenomena. However, it does not necessarily mean that human experience is not important; any social sciences (even hard sciences) involving human experiments, ideas, and analysis require validity checks and cannot achieve 100% objectivity.

Social science is about people and the interaction between people or interaction between people and the natural world. Therefore, human experiences remain important and are also the source of understanding human behaviour and mentalities. The facts and truth like the bonds of a human body are hard and provide the structure, while the fresh experiences of individuals are flexible but also real. Therefore, the researcher belongs to realism, but critical realism. From critical realism’s point of view, reality is ‘real’ but only imperfectly and probabilistically apprehensible (Creswell, 2009).

Epistemology is another important concept and concerns “how do you know you know”, whereas ontology is about “what is real”. Normally ontology dimensions will determine epistemology. For example, Nominalism usually corresponds with Anti-positivism, and Realism with Positivism. The way for Positivists to seek what happens in the social world is to explain and predict by search regularities and causal relationships between constituent elements. Positivists focus on finding truth and normally use hypothesis testing, where a proposition can be verified or failed. Anti-positivists or Interpretivists go against the unity of the world and understand the world through individuals’ understandings and points of view (Creswell 2003). Anti-positivism is a later paradigm, and one supported by mostly social scientists. The epistemology of critical realism is to find probable truth. According to nature it has its complexity, which means the truth is very rich and it is impossible to unfold all the guiding principles and facts in the cluster.

According to the discussion above, both the ontology and the epistemology of the researcher are critical realism. Under this guiding mentality, the researcher has the elasticity to accept hard evidence from the field of work, as well as individuals’ opinions towards the phenomenon of enduring clusters.
1.3.2 Qualitative vs. Quantitative

Qualitative research is a process of understanding based on distinct methodological traditions of inquiry that explore a social or human problem. The researcher builds a complex holistic picture, analyses words, reports detailed views of informants, and conducts the study in a natural setting (Creswell, 2009, p.15). Quantitative research is confirmatory and deductive in nature. The objective is to test or verify theory by collecting data, testing it and then reflecting on the confirmation or disconfirmation of the theory by the results. The theory becomes the framework for the entire study; an organising model for the research questions or hypotheses and for the data collection procedure (Creswell, 2009). Quantitative research methodology is more suited for hard science and answering straight forward questions such as “What”, “Who” and “When”, and these closed-ended questions are insufficiently deep for research in social sciences. Quantitative methodology is suitable for testing or verifying theories or explanations. It identifies variables to study through statistical procedures and emphasises validity and reliability. Qualitative research methodology is also more suited for in-depth social research and questions such as “How and “Why”. Therefore, open-ended research questions are more suitable to apply qualitative research methods to emerging rich data like texts or images etc. It allows researcher to collect ideas of participants, and bring personal value into the study and making interpretations of the data.

Following on from this, qualitative research is normally favoured by Interpretivists, with quantitative research favoured by Positivists. However, as two research paradigms, depending on the research topic and research questions, the researcher might break the boundary and use a mix research methodology or both methodologies. Jingdezhen porcelain research is a green field and has no hypotheses to test; therefore, it aligns itself within qualitative research or a combination of both.

According to the nature of the research topic, Jingdezhen as a cluster study is a green field exploration, therefore, there are not hypotheses to test or verify but rather an open field to explore and understand. Quantitative research therefore is not the best method, as it will not help in gaining a better understanding of this social phenomenon. However, qualitative as a research methodology is more suitable regarding the nature of Jingdezhen porcelain cluster research. Under qualitative research, there are many methods such as historiography, ethnography, Grounded Theory, action research, focus group, narrative research and so on. In order to explore a Chinese traditional cluster such as Jingdezhen historiography, ethnography and Grounded Theory are all suitable.

Historiography is an empirical research paradigm using an interpretive or qualitative approach which focuses on a chronology over a substantial period of time, in order to obtain a fuller and richer understanding of a situation or set of circumstances (O'Brien et al., 2004). Historiography originates from history, and is also well developed in the Sociology field. Ethnography was also developed by sociologists and is rooted in cultural anthropology.
(Goulding, 2005). It is focused on an up-close, personal experience, participation, and observation by researchers trained in the art of ethnography. Close field observation is the dominant research method. It works effectively in community research topics, e.g. minor ethnical groups for intangible heritage, where the data could be repeated and cultural issues can last from ancient times until now. Grounded Theory is a powerful research method for collecting and analysing research data. Invented by Glaser & Strauss (1967) (Allan, 2003), Grounded Theory is a qualitative research method that is most close to quantitative paradigms. It has a good reputation of rigorous, reliability and also has a well designed validity check. However, Grounded Theory is usually combined with other research methods, e.g. observations, interviews, focus groups etc.

Referring to the researcher’s preferred ontology and epistemology, Grounded Theory follows the quantitative research spirit and also aligns itself with critical realism. Although Grounded Theory has a history of less than 50 years, it has two basic classes: the Glaser and the Strauss. Although Glaser and Strauss had worked together and published several book and articles, their approach in Grounded Theory have attracted a number of researchers and followers. It is vital to discuss the two classes and make a choice from them. In next section, Grounded Theory will be discussed in the following topics: firstly, what is Grounded Theory; secondly, what is the difference between different branches in Grounded Theory research; lastly, what is the best approach for Jingdezhen porcelain cluster.

1.3.3 Grounded Theory as a Methodology

Grounded Theory is a general methodology of analysis linked with data collection that uses a systematically applied set of methods to generate an inductive theory about a substantive area (Glaser, 1992, p.16, Douglas, 2003). Grounded Theory is an effective approach to producing righteous research that is simultaneously relevant to business and management theory development and to professional practice (Fernandez, 2004). It is a powerful research method for collecting and analysing research data, and is a qualitative method that follows quantitative traditions. It was invented by Glaser and Strauss in 1967 (Allan, 2003) associated with sociology, nursing and health science (Goulding, 2005).

This research method is most suitable for the “inductive” process of qualitative research. In contrast to hypothesis testing built on underlying theory (which uses a hypothetic deductive approach), Grounded Theory starts with observations, which are made not to test existing theories, but to discover and generate theories that are as close as possible to reality (Rodon and Pastor, 2007). This process involves using multiple stages of data collection and the refinement and interrelationship of categories of information. Two primary characteristics of this design are the constant comparison of data with emerging categories, and theoretical sampling of different groups to maximise the similarities and differences of information. As Jingdezhen porcelain cluster exploration is an inductive research, Grounded Theory is best suited for this research topic.
Grounded Theory has become a very popular methodology in humanity studies due to its rigorous character. There are two kinds of recent approaches: Glaser’s approach and Strauss’s approach. Strauss and Glaser are considered to be founders of Grounded Theory; publishing many books and journal articles under the Grounded Theory topic and becoming the authority in this area. Their works including *The Discovery of Grounded Theory: Strategies for Qualitative Research* (Glaser and Strauss, 1967); *Advances in the Methodology of Grounded Theory: Theoretical Sensitivity* (Glaser, 1978); *Grounded Theory Analysis: Main Elements* (Strauss, 1987), *Basics of Qualitative Research: Grounded Theory Procedures and Techniques* (Strauss and Corbin, 1990); *Emergence vs Forcing: Basics of Grounded Theory Analysis* (Glaser, 1992). Although Glaser and Strauss are colleagues who have published together and hold the same views towards key elements like theoretical sampling and constant comparison, their emphasis and approaches in Grounded Theory have become more and more different. Strauss insisted on refining the coding technique by incorporating more analytical techniques and giving the researcher room in being more active. Glaser, however, argued that it was more important to take a passive stance free from preconceptions, trusting that theory will emerge (Rodon and Pastor, 2007). Regardless, the two approaches are not conflicting as researchers can be more creative in role playing while believing the emergence of theory will still take place. It is unnecessary to choose between either one; but rather combine their strengths in research design as explained later in Chapter Three.

1.3.4 The Use of Literature in Grounded Theory

In Grounded Theory, the function of literature is not to guide and to direct the study, nor is it to decide the research questions and hypotheses; rather, it becomes an aid once patterns or categories have been identified. The intention is not to exhaustively review literature prior to the research in many studies, but it is examined, integrated, and presented at the end of the study and becomes a basis for comparing and contrasting findings of the qualitative study. In opposite, the emerging theory from Grounded Theory should direct the researcher to appropriate extant theories and literature that are relevant to the emerging, grounded data. However, a common misconception from Glaser and Strauss’s earlier work is to enter the research field regardless of any theory or associated literature relating to the phenomenon, and expect the theory to emerge purely from data (Goulding, 2005).

Researchers actually enter the field with a handful of theoretical concepts and research experiences; especially new researchers who have little research experience and limited knowledge in academic theories and concepts. Regarding the training and experience of the researcher of this project, it is necessary to include background literature prior to conducting data collection and analysis. However, the background literature is only part of preparation for Grounded Theory. From *The Discovery of Grounded Theory*, Glaser and Strauss (Glaser and Strauss, 1967) stated that the core categories can emerge from the sociologist’s mind from his previous readings, life experiences, research and scholarship, and no one can remove
all the theories he or she knows before conducting the research, but literature reviews play a
different role throughout the research process. Thus, the key is balancing prior knowledge
while keeping a fresh and open mind for new theory to generate. Therefore, the best timing
for reviewing literature is before data sampling and after theory has emerged. Glaser commented there is a need not to review any of the literature in the substantive area under study, but it is important to read from the outset of the research, but in unrelated fields (Glaser, 1992, p.32). Later in Chapter Two, there will be a literature review on the broad background of this research in term of philosophy, sociology and economics. These are the environments where clusters exist, and through the lenses of great philosophers, sociologist and economists, traditional clusters can be better understood.

1.4 Research Venue: Why Jingdezhen?

Section 1.1 discussed the rise of traditional cultural research in China. The Jingdezhen porcelain cluster belongs to the traditional cultural art industry and it is the only city in China that survived for hundreds of years by porcelain only. Even now, porcelain remains the most important industry and delight of Jingdezhen. Revenue from porcelain exporting takes the dominant position in contribution to the region’s GDP. It has always provided employment to the towns and cities around it. The economic condition of the city relies heavily on the performance of their porcelain industries. On the UNESCO Culture Sector of intangible heritage, there is a list of Chinese representative intangible heritage (UNESCO, 2009a). Compared to the arts on this list, porcelain in Jingdezhen is relatively big and closely linked with local economy. The procedure of work traditionally involved 72 steps – which is complicated in technique and has very strict divisions of labour. Moreover, Jingdezhen’s porcelain industry had enormous influence during the Ming and Qing dynasties. Antiques of Jingdezhen porcelain were produced for the Royal family during that period of time, and are considered highly valuable on the market. When counting all the famous crafts with China’s cities, no other surviving craft is as big as Jingdezhen porcelain and easily identified in the business activities of its city. Jingdezhen is not distinct in the area of traditional art; it is also the best place of conducting cluster research. Traditional clusters over 2000 years are limited around the world. The influence that Jingdezhen porcelain had hundred years ago is significant; that is why “China” is called “china”. The world got to know China through its porcelain masterpieces. “China” is the sound of “Chang-Nan”, the former name of Jingdezhen. As a centre of porcelain manufacture, Jingdezhen is not only old, but remains very active even today. Because Jingdezhen is intricately linked with its porcelain industry, it is relatively easy to track its path with formal government records and official figures. Jingdezhen is not only old, but also mature in terms of being a complete or whole cluster , in terms of geographical location, city construction, facilities, and structure of relationships between industries and heritage in techniques. Therefore, Jingdezhen porcelain is the most suitable industry to conduct research.

Stoerring (2003) stated that the emergence of a cluster is a very long process, requiring a lot of patience, which may be a problem for policy makers whose performance is evaluated
every four years during elections. Therefore, creating a new cluster may require a ‘clusterpreneur’; a person with a vision who acts as an engine for the process. However, the development of the porcelain cluster in Jingdezhen did not rely on either the government or a clusterpreneur. Throughout its long history, no single government or person directed its development pattern, although they obviously pushed it in certain directions.

1.5 Chapter Summary – Organisation of the Thesis

This chapter introduces the nature of the study, by answering how recent history led to calls for traditional culture restoration in China, and the importance of traditional culture in the development of Chinese industrialisation and Chinese Economy. The definitions of the cluster concept from a variety of academic fields were discussed under the terminology chapter. A brief discussion of the researcher’s methodology from ontology, epistemology to research methodology that guides the theoretical construction of this research project is included. Finally the research venue, Jingdezhen, was justified.

This thesis has five chapters, including an introduction and conclusion. Chapter One discusses the purpose of cluster research in traditional Chinese industries, and how this research will be carried out. Chapter Two will present the background literature of Chinese traditional culture, which provides the background understanding of philosophies influencing Chinese culture and tradition within China and from overseas. Moreover, a brief history of Jingdezhen will be illustrated as well. Chapter Three presents a very important part of this research, by designing the entire procedure of the research process. The preferred research approach is discussed again in Chapter Three. Every research method employed is justified and discussed how to combine them into Grounded Theory. The most important part of research design is to plan the whole process of conducting Grounded Theory according to the nature of Jingdezhen porcelain industry. Chapter Four is the fieldwork and coding. There is a trial of coding in the first Beijing interview. After reviewing the results of the trial, the coding method is re-arranged with detailed coding and memos included in the Appendices. Chapter five discusses the emergence of theory with discussion on the relevant field of research; mainly cluster research. Conclusions are drawn in Chapter Six discussing the contributions, limitations and future research potential of this project.
CHAPTER TWO: BACKGROUND LITERATURE REVIEW

The reasons for including background literature were discussed in 1.3.4: The Use of Literature in Grounded Theory. Glaser argued there is a need to not review any of the literature in the substantive area under study but it is important to read from the outset of the research, but in unrelated field (Glaser, 1992, p.32). This review of background literature is to discuss and frame the background of Chinese traditional cultural clusters which does not have direct relevance to the main research project, and is not conflicting with the principles of Glaser and Strauss in terms of using substantive literature. Background literature is not extant literature, which is literature from relevant academic fields; in this case, cluster research.

Professor Joseph R. Levenson commented that the dividing tension among Chinese contemporary intellectuals was due to the conflict between Western values and China’s national history (Levenson, 1958). The culture reconstruction in China should be based on appropriate understanding of Western and Chinese cultures. During the past thirty years under the Reform policy, Chinese scholars became more rigorous to face the reality of Western influence in Chinese society, which remains heavily based on its traditional culture. Comparative Studies in West-Sino comparisons has becoming more and more popular (Mou, 2003, Yu and Shen, 2004, Yu and He, 2005). Because of the complexity and enormous variety between all the philosophical streams, it is impossible to conduct a comprehensive comparative analysis of Sino-Western philosophies here. Hence, in the background literature section, there will be several pairs of comparative analysis in four main themes: Traditional Chinese Thoughts, Western Philosophy in China, Western Classic Economics, and The History of Jingdezhen. In 2.1, there are two main traditional Chinese thoughts included: Taoism and Confucianism. After a brief historical introduction, the comparison between these two great Chinese thoughts will be in the area of key philosophies, modern development, influences in traditional culture, and impact on business. Later, three very important sociologists are introduced; Karl Marx, Émile Durkheim, and Max Weber. Their contribution to sociology and economics is notable. Karl Marx provides the social construction of China, while the other two explain social phenomena and raise theories from different angles. Between the three of them, a social reality closer to completeness can be illustrated. In Section 2.3, two giants in economics are discussed: Adam Smith and Alfred Marshall. They provide guidance in understanding economic and business activities. Finally, the last section provides a brief history of Jingdezhen.

2.1 Traditional Chinese Thought

There are three pillars of traditional Chinese thought: Taoism (Daoism), Confucianism, and Buddhism (Chan, 2007). Taoism and Confucianism are simultaneously contradictory and complementary. The origins of Taoism and Confucianism both lie in 6th century BC, during the Zhou dynasty. They were established by the two most influential philosophers in Chinese history, Lao Zi (also known as Lao Tzu and Master Lao) and Kong Zi (also known as
Confucius and Master Kong). The third traditional Chinese thought, Buddhism, originated from India. The understanding and development of Buddhism in India and subsequently in China are both different and alike. There is a big stream of religious research focused in Buddhism in China. However, some scholars consider only Taoism and Confucianism to be rooted in China. Therefore, there should be two pillars, rather than three pillars, of traditional Chinese thought. Weber considered Confucianism and Taoism as the foundations of Chinese culture (Bennion, 1992). Taoism may be considered as both a philosophy and a religion. In order to avoid possible confusion, it should be noted that Taoism is called Daojia or Daojiao in Chinese. Daojia literally means the school of Dao or philosophical Taoism. Daojiao means the religion of Dao or religious Taoism (Kirkland, 2004). Confucianism equals Rujia in Chinese. Rujia means the school of Ru (another name for Confucius). In general understanding, Taoism is classified as a religion more than a stream of philosophy, and Taoism as a religion has actually had greater influence on society. It is developed based on Daojia, but has a more complete religious system. However, although Buddhism had a significant impact on the development of Chinese tradition and philosophies, its role is peripheral to this research and therefore it will not be described further.

2.1.1 The Cornerstones of Confucianism and Taoism

Lao Zi lived during the Spring and Autumn Period and the Warring States Period, in 6th Century B.C. As a contemporary of Confucius, there is considerable debate about the details of his life (Bai and Chen, 2002). His given name was Erh, and his official name Tan, according to Sima Qian’s “Records of the Grand Historian” (Shiji) (Kaltenmark, 1969). During his time, the Hundred Schools of Thought blossomed, and the great philosophers were honoured as zi (or tsu), meaning “master”. Lao Zi started thinking about deep philosophical questions from a very young age. Between the age of 10 and 13, he asked his private teacher two questions: “If God has the ability to change and create, why not create people that obey (all the time)?”; and “If the king could not govern (the country), why should God not govern it instead?” (Guoxue, 2009). When he became 13, his teacher said to Lao Zi’s father that he had nothing more to teach Lao Zi as he was too smart. Lao Zi then moved to the capital city Zhoudu, and studied as much as he could. The areas he covered included Taixue (Imperial Study), Astrology, Geography, Ethics, Shijing (the Book of Odes or Poetry), Shujing (the Classic of History), Liji (the Classic of Rites), Yijing (I Ching or the Classic of Changes), Yuejing (the Classic of Music), and much more. After a few years of hard work, he became the court archivist of the Zhou Dynasty, serving the kings. When he saw the Zhou Dynasty shrink, he left his position, ready for seclusion. Just before his seclusion, he wrote Dao De Jing (also known as Tao-te-ching or Lao Zi). Dao De Jing has 5000 characters, with 81 verses. It has two parts: Dao (Tao) with 37 verses and De (Te) with 44 verses. The first part, Dao, literally means “way or truth”. Dao is the ontological foundation of Taoism. De means virtue, referring to how people should behave in society.

Confucius (Kong Zi or K’ung Chi’iu) was the founder of Confucianism. He was born in 551 B.C. and died in 479 B.C., living during the same era as Lao Zi. Confucius was the offspring
of aristocrats of the Shang Dynasty. After the Shang were ruined, about 500 years before his
birth, his ancestor was appointed to the hereditary position of head priest at the altar for
Shang rites (Guoxue, 2009). Although Confucius descended from a noble family, he
experienced a very tough life. His mother was his father’s third wife; they got married when
his father turned sixty-six, and he died when Confucius was only three years old. He and his
mother moved out with his ill elder brother, who was born by the second wife, in order to
avoid persecution from the first wife (who bore nine daughters but no sons). Confucius’s
mother, who was strongly committed to providing him the best education possible, died when
he was a young adult. Although Confucius has a very poor and tough life, he did not give up
studying. When he was 15 years old, he committed to the pursuit of learning. A famous quote
from The Analects of Confucius, Shuer (Chapter Seven), was: “When I walk along with two
others, they may serve me as my teachers. I will select their good qualities and follow them,
their bad qualities and avoid them.” (Legge, 2004). From the age of 30, Confucius started to
receive students, and informally established the first private school in China, while all other
schools belonged to the emperor. He was considered an educator, ethicist, and ideologist.
During his lifetime, he had three thousand students in total; seventy-two students among them
were considered his disciples. Confucius re-edited six ancient classics, which became the
Liushu (Six Books), as his teaching materials. These six books became compulsory materials
for formal education in China. They are the Shujing, Shijing, Yijing, Chunqiu (Spring and
Autumn Annals), Liji, and Yuejing (Kohn, 2004). Confucius held a great desire to serve as a
politician; however, his political career was replete with difficulty and rejection. His uneven
political career with negative experiences did not prevent Confucianism from becoming the
dominant philosophy of imperial governance for the next two thousand years, until the 1900s.
The canon of Confucianism, unlike Taoism, was not written by Confucius, but his disciples.
The Analects of Confucius (Lunyu) were written in the early Warring States Period, and
consists of 20 chapters and 486 verses. The verses in The Analects are in general very
concise, covering a variety of topics based on the interaction between Confucius and his
students. After his death, The Analects were listed as the first book among the Four Books
(sishu); they constitute a canon that every intellectual had to learn by heart.

Lao Zi and Confucius lived during the same historical period, although Lao Zi was born a bit
earlier than Confucius. According to historical records, they encountered each other many
times. The most reliable source, Sima Qian’s “Records of the Grand Historian”, relates two
particular meetings. After one, Confucius described Lao Zi: “I know a bird can fly; I know a
fish can swim; I know animals can run. Creatures that run can be caught in nets; those that
swim can be caught in wicker traps; those that fly can be hit by arrows. But the dragon is
beyond my knowledge; it ascends into heaven on the clouds and the wind. Today I have seen
Lao Tzu and he is like the dragon!” (Kaltenmark, 1969, p.8). Other than that, Zhuang Zi (The
Writings of Chuang Tzu), Liji (Classic of Rites), Kongzijiayu (Family Dialogue of Confucius),
Hanshiwaizhuan (companion stories to Shijing [The Odes of Poetry] by Han), and
lushichunqiu (Encyclopaedia by Lv) have more records (Bai and Chen, 2002). The first
meeting between Lao Zi and Confucius took place when the latter was aged 17. They talked
about the contexts of rites according to *Liji* (Classic of Rites). When Confucius was middle aged, the focus of their conversations was the philosophy of life. They may have discussed *Shijing*, *Shuijing*, and *Yijing*, according to Zhubang Zi. The last recorded meeting, cited in Zeng Ziwen (Questions of Zeng Zi), occurred when Confucius was fifty-seven years old. The meetings between Lao Zi and Confucius are very important for scholars in the field of Chinese traditional thought, especially their later conversations over the philosophy of life. Lao Zi and Confucius had many things in common: They were both heirs of ancient Chinese tradition; they agreed that during their time, there was not *Dao*; and they had a strong historical mission accumulated from the crises of age and culture. However, they held different attitudes and opinions towards the crises. Feng Youlan pointed out that the roots of Taoism and Confucianism are like the two ends of a bar (Bai and Chen, 2002): They are far apart, even opposed to each other, but still on the same bar.

### 2.1.2 The Main Thoughts of Confucius and Lao Zi

Kirkland stated: “To begin explaining Taoism as it truly was, in terms of the social and historical facts of Chinese history and culture, we need to learn to see that the holistic vision of Sung T’ai-tsung goes back through the historical realities and ultimately back to the Tao-te-ching. Such is the enduring heritage of Taoism” (Kirkland, 2004, p.217). The developments of Taoism and Confucianism have undergone many phases. There are tens of thousands of written commentaries, and even more books generated by the inspiration of *Daodejing* and The Analects. Numerous distinct followers of Taoism and Confucianism have carried the thoughts to new levels. In this section, the main thoughts of both philosophies will be presented, along with a discussion of their similarities and differences.

As the ontological foundation of Taoism, *Dao* appears seventy-two times in *Daodejing*. In *Daodejing*, the first chapter begins with: “The Tao that can be expressed is not the eternal Tao: The name that can be defined is not the unchanging name. Non-existence is called the antecedent of heaven and earth: Existence is the mother of all things” (Shi, 1988, p.23). *Dao* here means more than way or truth, but the origin of all living creatures that could not be named and known by ordinary human senses. Non-existence (or *wu*) does not mean that *Dao* is unreal; rather, that it does not exist in within the perceptual capacity of human senses. In Chapter 40 of *Daodejing*, it says: “All things in the Universe come from existence, and existence from non-existence” (Shi, 1988, p.41). Therefore, according to Taoism, non-existence actually exists. The meanings of *Dao* are multiple: it is not just the origin of the Universe and the laws that govern the physical world, but also the highest standard of virtue in our daily lives and the source of deepest knowledge and wisdom. Moreover, it represents the highest level of personal cultivation, the ideal status of social and political life (Bai and Chen, 2002). The way to reach *Dao* is through *Wuwei* (nonaction) and *Ziran* (naturalness). *Ziran*, a third fundamental concept in Taoism, is simultaneously an attitude, a set of values, a condition, and an effect, systemically linking humanity with nature. *Ziran* complements *Wuwei*, as *Wuwei* does not exclude any human activities, but spontaneously reacts according to naturalness and excludes behaviours that go against *Ziran*. Chapter 3 of *Daodejing* states:
“He governs by nonaction; consequently there is nothing un-governed” (Shi, 1988, p.25). The principles in Taoism are useful not only in personal cultivation, but also in politics, where kings or statesmen follow Ziran and commit to Dao.

There are five fundamental principles in Confucian ethics: Ren, Li, Yi, Zhi, and Xin. Ren is the core of Confucian thought. It is also the most important intellectual contribution of Confucius. Ren means “benevolence, man to manness, perfect virtue, human heartedness, and humanity” (Liu, 1998, p.17). Ren is the intrinsic character of being human, and its extrinsic appearance is love (Wang and Yang, 2006, Liu, 1998). The love in Ren requires profound wisdom and sound judgment. The Analects state: “Confucius said: ‘Only the man of jen knows how to love and how to hate people’” (Liu, 1998, p.18) – it is associated with principles; e.g. one should hate immoral or evil actions so that the doers may be forced to repent and become better men. The kind of love that Confucius prompted is not selfish love, but love towards humankind. Li means etiquette or propriety. Li and Ren are like the two sides of a coin. If Ren is the intrinsic principle of personal cultivation, Li is the proper way or channel of accomplishing Ren. Meng Zi said Li is the door. Without the behaviour-restricting framework of Li, there is no way of Cheng Ren (accomplishing Ren). The model sage according to Confucius’ ideology exhibits the combined characteristics of intrinsic Ren and extrinsic Li. Li contains several types of moral and ethical responsibilities and duties. It forms consistent behavioural models within relationships as a concrete behavioural criterion (Tang and Cao, 2000). The ultimate purpose of Li is to accomplish harmony in society.

Complementing the two core concepts of Ren and Li are three related principles. Yi is another word for ethics in Chinese. It contains the meaning of justice, fairness, and righteousness. Yi is the standard for distinguishing between good and evil; thus, it is the judge of human behaviour. Yi is the standard that helps oneself to first practice goodness and suppress evil inclinations, and then to love others and accept social responsibilities. Yi could be a life goal of accomplishing justice in society. From Confucian’s point of view, Yi arises from the inherent moral concepts held by individuals, rather than from rules or ethics imposed from outside. Zhi means intelligence. It contains knowledge and rationality. However, in Confucianism it means moral or ethical knowledge and rationality. If Yi is the standard of distinguishing between good and evil, then Zhi is the ability to make such judgments. The function of Zhi is also to discover more about one’s moral reality and make improvements to achieve personal cultivation. Xin is the fundamental moral criterion of Confucianism. It means honesty, authenticity, and trueness to some concepts, principles, and words. It is based on agreement of the realities in the universe that people should act according to their beliefs and be honest with one another. Xin is the key for handling relationships in family, in business, and in society. Ren, Yi, Li, Zhi, and Xin are the five fundamental criteria of feudal society, and are collectively called Wuchang. In addition to Wuchang, there is Wu lun, which governs relationships in a feudal society. Wu lun contains five relationships: ruler and subject, father and son, husband and wife, elder brother and younger brother, and friend and friend.
Wulun developed from Sangang, which contains only the first three pairs of relationships (Tang and Cao, 2000).

Confucianism and Taoism share the belief that if individuals pursue personal cultivation and morality, the society will be transformed (Kirkland, 2004). However, there are also significant differences. When comparing the two, Taoism heavily stresses personal development but is less concerned with the function of individuals in society. Taoist ethics are more abstract and dynamic; Confucianism is more specific and has a clearer structure. Taoism, as a religion, has broader influences in China than a stream of philosophy would. In Chinese tradition, there are two forms of authority: earthly and spiritual. In feudal society for over two thousand years, Taoists assisted in managing the heavenly mandate for the emperor, while Confucians helped in creating and maintaining social order.

2.1.3 How These Two Philosophies Influence Traditional Arts and Culture

From the basic concepts of Confucianism and Taoism, Confucianism did not explore beyond human society, and merely mentions heaven and God. Taoism, on the other hand, has a major concentration on Dao, where Dao represents the source and origin of the world. Confucianism focuses on the physical and mental reality of human experiences, while Taoism focuses on spiritual reality. Because of the invisibility of the spiritual world, Taoism provides greater room for exploration and imagination. The ensuing curiosity and desire to understand the spiritual world are often carried out and satisfied in artistic forms. Art in nature is mainly for spiritual pleasure, but it is carried out in different forms that relate to people’s daily lives. Concepts arising from Confucianism and Taoism should influence traditional arts from different angles. The following section explores how these two philosophies have impacted Chinese traditional arts.

The wisdom and culture derived from Taoism are the nutrition for traditional artists. They personally experienced cultivation through Taoism, and were influenced by legends created throughout the development of Taoism. From these inspirations, they created enormous masterpieces, filled with novelty and fresh dynamics. Firstly, Taoism had a significant impact on traditional literature. During the development of the Taoist religion, tens of thousands of legendary characters were created; they have their positions in heaven, distinguishing characteristics, and unique life stories. They became the raw material for artists to develop fictional stories. The most famous ones written based on Taoist legends include: Xiyouji (Journey to the West), Fengshenyanyi (The Investiture of the Gods or the Creation of the Gods), and Liaozaizhiyi (Strange Stories from a Chinese Studio). Other traditional literature, such as Hongloumeng (Dream of the Red Chamber) and Jinpingmei (The Plum in the Golden Vase), were also written under influence of the Taoism philosophy. Second, Taoism had great influence in poetry and the fine arts. One stream of poems about heaven is called Xianyoushi (Poems of Heavenly Journey); a key representative is Li Bai, one of the greatest poets in China’s history. Fine artists like Gu Kaizhi, Wu Daozi, and Wu Zongyuan were good at painting motifs from Taoism. Painting styles like “Shanshui” and many others were
frequently inspired by Taoist imagery and motifs. The symbolism technique in Chinese landscape painting has strong linkages with the symbolism of Taoism (Wikipedia, 2009d). Taoism also influenced traditional music, sculpture, mural painting, calligraphy, gardening, architecture, dance, drama, porcelain painting etc. (Zhan, 2005, China's Best Arts & Crafts, 1981). It does not just provide the content and framework for the arts; it impacts nearly every aspect of artistic production. Most importantly, Taoism provides the ontological foundation for artists, affording them a great canvas on which to exercise their imagination. The aesthetics under Taoism are embedded in the national aesthetics of the Chinese people, shared by every Chinese person in general (Xu, 1994a).

By comparison, the influence of Confucianism impacted society in very different ways. Confucianism itself did not provide enough room for imagination and inspiration for artists. It was the dominant philosophy for governance and social ethical construction. Confucianism itself is part of Chinese culture, which evolved continuously in order to fit the historical and social conditions. There are three major growth epochs of Confucianism. From Confucius (Spring and Autumn Period) to the end of the Later Han Dynasty, is the first period (approximately 520 BC to 220 AD). From the Song Dynasty through the Qing Dynasty (approximately 960 to 1919) is the second period, during which Neo-Confucianism arose and developed. The third period, commencing in 1919 and continuing today, introduced New Confucianism, based on critical reflection on the mature theoretical framework of Neo-Confucianism developed in the Song Dynasty (Yao, 2000).

In the Hundred Schools of Thought period, during Confucius’ lifetime, the emperor sought the most suitable philosophy among the hundred schools, and Confucianism stood out as it satisfied both the centralisation of imperial authority and the kinship nature of normal society. Confucianism became the only official philosophy and was elevated to a very high status, above all the other schools. Later, during the Han Dynasty, a Confucian named Dong Zhongshu developed Confucianism along three dimensions: hermeneutics, religion, and politics (Xu, 1994b), writing many expository books and prompting masterpieces to ensure the dominant position of Confucianism in the Han Dynasty. During the Sui and Tang Dynasties, many poets including Han Yu, Fan Zhongyan, Ouyang Xiu, and Liu Zhongyuan were involved in the reformation of Confucianism. At that time, there was a trend of unifying Confucianism, Buddhism, and Taoism, while Confucianism was not as popular as before. A stream of reformers and intellectual politicians started the Classics Movement, producing a huge amount of literature, paintings, and poetry aligned with Confucian philosophy. In the Song Dynasty, Neo-Confucianism emerged through three distinct contributors, Cheng Hao, Cheng Yi, and Zhu Xi. Cheng Hao and Cheng Yi established Luoxue (The Study of Luo or Luo Neo-Confucianism), while Zhu Xi developed Minxue (The Study of Min or Min Neo Confucianism) based on Luoxue. Minxue is the highest accomplishment in the development of Luoxue in many aspects; first, Zhu Xi made and rearranged the Neo-Confucianist canon; second, he established the Dao tradition in Neo-Confucianism; and third, he constructed the
system of Neo-Confucianism. Following the end of the last imperial dynasty, in 1919, Confucianism commenced another renaissance, with further developments continuing today.

2.1.4 How These Two Philosophies Influence Business Practices

During the 6th century B.C., Lao Zi and Confucius had already discussed business phenomena, as recorded in their canons (Yu and Cheng, 2007). Their opinions towards the business world were considered insightful and full of wisdom. Although Confucius and Lao Zi themselves may not have personally opposed business, their followers depressed the status of businessmen at the earliest stages of the development of both Confucianism and Taoism. As the leading traditional philosophies, Confucianism and Taoism influenced and governed the daily practices of Chinese society. They also inevitably influenced people in the business world. Nowadays, business ethics and sustainability are frequently discussed. Topics such as “What could Chinese traditional culture provide to the world?” have been raised with the purpose of seeking solutions to global problems, such as the effects of over-industrialisation and practices of classic economic theories (Xu, 1994a). For example, Hill recently explored the religious roots of East Asian management styles and considered both Confucianism and Taoism as strong influences (Hill, 2007).

The core of Taoism is about Dao, which is about nature and the universe. Therefore, the first relationship to deal with in Taoism is the relationship between individuals and nature (and the cosmos). It suggests human beings should act according to the laws of nature, supporting the concept of sustainability (Li, 2007). Hodgkinson believes that the problems of the world, physically and socially, are due to humanity’s restlessness (Hodgkinson, 2008, p.66). People are wearing themselves out. Thus, he initiated the “Do Less campaign” to promote his idea. The philosophy behind it is based on Taoism, especially the concept of Wu Wei (meaning non-action or without action). He pointed out that “Do Less” will benefit both the planet and people’s souls, fulfilling a dual sustainability function.

Apart from sustainability, Taoism also impacts on managerial behaviours, such as consensus decision-making, moderation, conflict avoidance, and acceptance of change (Hill, 2007), according to the stream of literature concerning the relationship between Taoism and business. Later Taoist developments emphasise inner-worldly asceticism (Yu and Yin, 2004). Paralleling Protestant ethics, Taoism promotes the virtues of diligence and frugality, which help businessmen accumulate wealth. It also goes against unethical practices in business. Taoism discourages rivalry, placing both nature and social harmony above personal gain (Yu and Shen, 2004). According to teachings from Daodejing, people should accept their social responsibilities and take care of the poor and the weak as best they can (Zhang, 2008). The Dao in Taoism is equivalent to the invisible hand of Adam Smith. The system described in Taoism is an open system, just like a free economy, and Taoism could therefore provide a lot of inspiration for a free economy (Xiong, 2004). As discussed when concerning the influences of Taoism in traditional culture, Taoism has also had the ability of enhancing the
innovative capacity of businessmen. In contrast to Confucianism, Taoism promotes the spirit of uniqueness and freedom (Bai and Chen, 2002).

The framework of social ethics is quite mature in Confucianism. As a governmental tool, Confucian ethics have been critically reviewed and refined on many occasions to suit the interests of the emperor and society. Although Taoism also mentions ethics, it is Confucian ethics that dominated interpersonal relationships in ancient China. The ethical economic ideology of Confucianism was embedded in feudal economic theories and practices (Tang and Cao, 2000). However, the study of Confucianism in the business arena did not become popular until the late 1970s and early 1980s, when the economies of Japan, Singapore, Korea, Taiwan, and Hong Kong boomed (Yu and Yin, 2004, Wang and Yang, 2006). Yu published several papers in the area of Confucian ethics and the spirit of businessmen as a historian (Yu and Shen, 2004, Yu and Cheng, 2007). By analysing records of businessmen’s behaviours in the Ming and Qing Dynasties, he recognised many Confucian virtues in business practices. As in Taoism, diligence and frugality are part of Confucian business ethics. Authenticity and honesty also feature on the list of Confucian ethics. Later, Jiadao (meaning the way of doing business) emerged. It is equivalent to the process of rationalisation by Max Weber (Yu and Shen, 2004). Reputation and virtue became the two most important values under the influence of Jiadao. The status of businessmen rose significantly, and business won respect from the general public. Under the influence of Jiadao, not only should business owners establish their reputation through their virtuous practices, but so should their employees. This business ethic also influenced the employment regulations at that time. Moreover, the guiding principle of doing business in China developed: large turnover with small margins. This remains the governing marketing strategy used by most Chinese businesses nowadays. In a Confucian-dominated society, relationship development is the key to business success (Tang and Cao, 2000, Hill, 2007). The stream of business research in relationship development, or guanxi, derives from Confucianism (Duo, 2005, Siu, 2003). The ethics inherent in relationships such as Wulun control the pattern and business phenomena of family businesses in East Asian countries such as Indonesia, the Philippines, Singapore, Malaysia, and China. Differing from Taoism, Confucianism encourages both cooperation and competition. It also advocated division of labour (Wang and Yang, 2006), far earlier than did Adam Smith and Alfred Marshall.

2.1.5 Section Summary

Many concepts from Confucianism and Taoism, aside from those mentioned above, are beneficial to both society and business. There is substantial potential for empirical explorations examining philosophical impacts on Chinese business. Such research will not only help explain historical economic phenomena and business behaviours, but will also provide guidance concerning future social and economic developments in China, where corruption remains a big problem.
This section introduces the originators of Confucianism and Taoism, and compares the impact of these two philosophies in the area of traditional culture and business. After a broad discussion, it arrives at the understanding that it is not possible to have a genuine understanding about China without sensing the traditional thoughts behind it, especially Taoism and Confucianism. These two philosophies (along with the influence of Buddhism) provide the answers for “what is existing”, “how do you know you know”, “what is right and what is wrong” – the fundamental ontological, epistemological, and ethical questions. They have been passed on from generation to generation for over two thousand years, and became an indivisible characteristic of being Chinese. They could be slightly adjusted, modified gradually, but trying to go against them radically creates crisis. If nature is something we should not go against, as Taoism emphasises, radical revolution in ideology is also not sustainable. In the section below, streams of Western philosophies that impact the contemporary development of philosophy in China will be discussed.

2.2 Western Sociologists and their Influences in China

This section will address three questions: What are the Western philosophies that impact the contemporary development of China; how do they impact China; and what are the consequences? This set of questions follows the belief that all societies share a certain degree of similarity in addition to featuring their own unique characteristics. Eastern philosophies and Western philosophies are not competing against each other, but complementing each other. In the modern development of China, Western philosophies have played very important roles in China. Communism, based on Karl Marx’s theory, laid the political structure in China. Later, the Chinese extended this base by adding Weber’s sociological theory (Chen, 1987). Several other sociologists were influential during the modern era, with Karl Marx, Émile Durkheim, and Max Weber ranking above all others (Giddens, 1971). These three figures have also strongly influenced sociological paradigms in research methodology (Burrell and Morgan, 1979). Although they discussed economics issues such as capitalism and division of labour, their influences also dominated social-political aspects, thus setting them apart from the classical economists that will be covered in a later chapter. The remainder of this section will focus on the main theories of the three top sociologists, and their application and influence in China.

2.2.1 The Sociologists: Karl Marx, Émile Durkheim, and Max Weber

Marx, Durkheim, and Weber had very distinctive approaches to sociology that are not quite complementary. Marx made distinctive contributions to the sociology of radical change. The two paradigms under radical change are the radical humanist paradigm and radical structuralist paradigm, which reflect the ideologies of the young Marx and the mature Marx, according to the works he produced during those two periods of his life (Burrell and Morgan, 1979). Compared to Marx, Durkheim and Weber shared more ideas, both being more or less influenced by German idealism (where Weber remained, but from which Durkheim tried to depart). Durkheim represented the functionalist paradigm, which is more objective than
German idealism, while Weber represented the interpretive paradigm, which is less objective than the functionalist paradigm. Both Durkheim and Weber belong to the sociology of regulation, opposed to Marx in many ways (Burrell and Morgan, 1979). Contemporary China was influenced heavily by Marxism in nearly all aspects. However, the elites increasingly introduced Durkheim and Weber for the purpose of better understanding Chinese society. A more holistic exploration of sociology beyond Marx is necessary in order to have a more balanced view of the social and economical phenomenon of China.

2.2.1.1 Karl Marx

Marx was born in 1818 and died in 1883. From The Writings of the Young Marx on Philosophy and Society, some characters of young Marx could be portrayed. On page 39, he wrote: “Rather, man’s nature makes it possible for him to reach his fulfilment only by working for the perfection and welfare of his society…” (Giddens, 1971). Philosophically, Marx was first fascinated by Kant and Fichte, and then attracted by Hegel as a university student. He believed Hegel could somehow answer his theoretical questions, e.g. our own perfection. However, he is not a blindly follower nor a loyal fan of Hegel, especially the latter’s influence of Feuerbach’s The Essence of Christianity. It is clearly that Marx was seeking his own thought through the philosophers belonging to German idealism. In his early work, like Economic and Philosophical Manuscripts, and the Manuscripts, he gradually formed and conceptualised his ideas toward the state, democracy, revolutionary, political economy, historical materialism, and early conception of communism. Due to this, he was part of Young Hegelians. The breaking point between young and mature Marx is in the year 1844, though The German Ideology. In this book, Marx stated the tenets of historical materialism. From then, he shifted his focus to theoretical exploration and empirical application of his latter work. They achieved self-clarification through The German Ideology, which is regarded as the dividing piece of work of young and mature Marx.

Class is the fundamental concept in mature Marx’s work. In Marx’s conception, classes are not made of multiple income groups or functional groups; in bourgeois society, they are simplified and universalised. Gradually, two great classes emerged with conflicting relations: the bourgeoisie and the proletariat. In Marx’s work, classes, especially conflicting interests between classes, determine the relations of economical production and social structure; moreover, it shapes the political dynamism. Marx, as a political economist, also considered economics and politics to be closely related. In bourgeois society, the bourgeoisie dominates not only property, but also has significant power in the legal system and politics. The political and legal systems which serve the bourgeoisie class have created disadvantages for the proletarian class. The second important concept of mature Marx is capitalism. Marx defined Capitalism as a system of commodity production (Giddens, 1971). In the three volumes of Capital, Marx’s economic theories are explained fully. First, he states the theory of surplus value by analysing and clarifying relationships between value and surplus value, surplus value and profit, and surplus value and actual price. He concluded that commodities sell at their “prices of production” rather than value. Upon the theory of surplus value, Marx
established the theory of capitalism development. In chapter 5, volume 3 of *Capital*, Marx states that “the aim of capital is not to minister to certain wants, but to produce profit” (Marx, 2008). Thus, capitalism is based upon profit-seeking through competition. Profit is the driver of improvement in nearly all aspects, by providing better and cheaper products and services. Marx also mentioned periodic crises would be encountered in capitalism, which not represented a “break-down” of the system, but conflict between overproduction and profitability. *The Critique of the Gotha Program* and *The Communist Manifesto* are two other influential books. Marx recognised the transcendence of capitalism and made sound considerations and predictions upon the historical development of capitalism about bourgeois society. There are two general misconceptions about Marx: Marx conceives the resolution of capitalism after a significant disaster which the system could be recovered, and the universal application of his historical materialism and political economic theories. Marx did not specifically predict a final crisis that could destroy capitalism, nor did he consider historical materialism could be applied in any country (Yu and Yin, 2004). He made himself apart from Marxism due to these reasons.

### 2.2.1.2 Émile Durkheim

Comparing to Marx and Weber, Durkheim (1858-1917) did not lead a career involving as much politics. All his works are entirely academic in character, which have a more coherent theoretical outlook. Durkheim laid the foundation for Sociology in France by providing the institutional context and the theories and methods in this emerging science, upon which Auguste Comte gave its name and an ambitious prospectus. His influences are not limited to the field of sociology, but also reach anthropology and history. The “structuralism” of French anthropological school owes a great deal to the work of Durkheim and his followers (Thompson, 1982).

Durkheim, the same as Marx, is a Jewish, and was born in Epinal near the German border. During his time, France awakened to advocate sciences and secular republican principles in order to compete with Germany. Young Durkheim was well equipped for the emerging sociology, including circumstances of his life and character of his education. As a student, he had set his life’s goal in studying the relationship of individualism and socialism, which is sociology. After training in systematic empirical research and the comparative methods and holding a mission towards sociology, Durkheim was sent to Germany to report on the social sciences in Germany and making recommendations for French education. To Durkheim, Marxism was a symptom of the troubled state of society (Thompson, 1982). However, in some aspects, people believed they share a degree of similarity especial towards “structuralism” and class conflict (Thompson, 1982). The majority of his early writings were involved with contemporary German social thinkers. “The Division of Labour” is one of the representing writing of Durkheim’s early works, which is highly polemical. As he described the book: “This book is above all an attempt to treat the facts of moral life according to the method of the positive sciences (Giddens, 1971, p.72)”. 

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Durkheim’s sociology is built up with notions developed in *The Division of Labour*; it could be proved by *The Rules of Sociological Method* (1895) and *Suicide* (1897). *The Rules* (Short for “The Rules of Sociological Method”) is a piece of challenging methodological work explaining previous methodological assumptions in “The Division of Labour”. The primary objective of *The Rules* is to define the nature of sociology and its investigation field. Systematic methodological views of Durkheim could be found through this book. *Suicide* is very different to *The Division of Labour* in subject-matter; Durkheim was adopting a new method to explain statistical data through the lens of sociology. He found a relationship between suicide rates and religious denomination, mainly between Catholic and Protestant countries. In order to fully explain the relationship, Durkheim introduced economic, political and religious study along with sociology. Although the theme of *Suicide* is quite different to *The Division of Labour*, arguments towards social morality and social order are actually based on the latter book. An area of contribution through Durkheim’s works is the relationship between religion and moral discipline. Not until 1895 was he aware of the importance of religion as a social phenomenon; this recognition shifted him from the materialistic school towards idealism.

The representative piece of writing is *The Elementary Forms of the Religious Life* (Short as *The Elementary*); it concerns the function of religion in society. *The Elementary* is also a comparative thesis of profound changes in modern societies and the traditional forms of society. In this book, Durkheim clarified the character of the sacred based on Australian totemism; discussed the importance of ceremonies and rituals in traditional societies in holding a strong conscience collective. Durkheim commented that all collective moral or ethical beliefs possess a “sacred” character. He also examined the relationships between rationalism, ethics, and egoism (means the cult of the individual) in *The Elementary*, and further illustrated the relationship between Christianity and modern moral individualism. Durkheim believed that the problems of modern society could be solved through consolidation of ethics through different divisions of labour, which requires different forms of authority derived from that of traditional societies. Unto the point, Durkheim holds a very similar idea to Confucius from China, while Confucius put *Li* as the functional practice to maintain social order.

### 2.2.1.3 Max Weber

Max and Alfred Weber are two German brothers and distinguished sociologists. However, the fame of Max Weber exceeds his brother and become one of the secular trinities of sociologists deified wherever Sociology is taught beside Durkheim and Marx (Parkin, 1982). Max Weber was born in 1864. He grew up in a talking shop for local intellectuals including academics, businessmen, artists and politicians, which provided the foundation for his future career and established in him a great sense of culture, economics, and politics. His first career in academia was as a law lecturer in Berlin. However, his life was not easy and smooth. He once withdrew from academia, and spent substantial time travelling around South Europe and the USA, until resettling down and producing essays on methodology and the Protestant ethic,
dealing with a wide range of disciplines including legal institutions, religious systems, political economy, and authority relations. The complexity and richness of Weber’s research was so surpassing that it is doubtful there will be anyone else who could range beyond Weber. Methodology wise, Max represented the school of interpretivists, contrasting to Durkheim’s sociology, which was imbued with collectivity and an objective approach. Weber took the individual’s subjective meanings as the starting point of social enquiry. Weber is famous for creating the theory of bureaucracy; he talked about authority and wrote *Protestant Ethics and Capitalism*, a book in which he analysed the relationship between Protestantism and capitalism, mainly about Calvinist-type social ethics which emphasised the value of secular activity and the duty of abstinence. He also wrote *General Economic History* towards the end of his life, providing conceptual frameworks and definitions of the history of economics.

The importance of Weber in cluster research is as a sociologist, as he clearly discusses the clustering phenomenon in his publications (Max, 1961, p.49). One clustering phenomenon is the clan (Max, 1961), which means blood kindred and includes totemic clans, military clans, and other blood kinship groups. Every ancient city was composed of clans and not originally of individuals. He also mentioned guilds, which are an organisation of craft workers specialised in accordance with a type of occupation (Max, 1961, p.110). However, guilds are not clusters as the division of labour is on final product or technical specialisation of operations. Industry means production outside household needs wherein individuals receive monetary payments. It appears that at the beginning of capitalism, clusters differed from all three of these business phenomena; nonetheless, all can be found in both traditional and modern clusters. Modern clusters could be a part of industry or related to several industries at a time in an identical location, however, there will not be any blood kinship between the majorities of its members. However, in traditional clusters, guilds and clans are among their most basic units. Frankly speaking, the economic system based on clans was semi-communistic until around the 1920s to 1940s. Therefore, Weber’s research and theories contributed to the area of traditional cluster research, which does not yet belong to the main stream of research in cluster studies.

2.2.2 The Applications and Influences in China

The three sociologists are highly relevant to the development of China and the Chinese economy. Karl Marx provided the social structure and system of Communism which is the foundation of China’s political system. In order to understand the history and society of modern China since 1949, Marx and his theories have to be studied. The influence of Communism is not once-off; the Chinese Communist Party seriously follows Communism and develops and upgrades the theory to be more applicable to China. In most universities in China, there are Marxism Study Centres. Therefore, Marxism does not only lay the structure, but has ongoing influence in modern China’s social-political construction. The Chinese government finds solutions to social problems from the root of Communism. However, Marxism as a radical paradigm is not sustained by itself. The best environment for Communism theory is when there are conflicts between different social classes. When the
society is in harmony and peace, Communism theory has to be modified to a certain degree with local reality. Therefore, the guiding ideologies nowadays in China lies in combining Communism, formal president Mao’s thoughts, Deng Xiaoping’s theory and President Hu Jingtao’s guidance. Communism is a very efficient tool to deliver the Chinese from feudal society to a completely new world. In the early development stage, it is like a road map for the immature government, but several disasters took place in history, which present a fact that the governing laws of human society do vary.

Durkheim and Weber respect stages of the human history. Although they are not as famous as Marx in China, more and more scholars pay attention to their theologies. Because of racial Communism, for about twenty to thirty years the tradition has been ruined and completed opposed. Books were burnt; people were “re-educated” in order to set apart from the old times. The Chinese eventually realised they could not study the future and become better off without knowing the past. Durkheim and Weber present the most basic and generic social principles and theories for human society. Thus, scholars could follow their methodologies to study the past and guidance in analysis. Weber in particular was very interested in Eastern cultures like India and China. He had published books discussing Chinese religions. Both Durkheim and Weber discuss the division of labour as sociologists. Division of labour is the guiding principle of cluster theories. Discussion of division of labour in the social setting is highly relevant to the topic of Chinese traditional clusters.

Clusters are firstly a social phenomenon, then a business phenomenon, because not matter whether a cluster or business, it is all about people. Without the linkage to people and interaction with people, it then is not humanity. The introduction about the three great sociologists and their main theories is not irrelevant, and crucial background studies will inspire in-depth exploration of social phenomenon. When discussing Chinese traditional clusters, the long history of feudal society and the current Communist political system are both very important backgrounds and environments. Marx, Durkheim and Max provide a summative overview of the past in a logic that can be understood today, and also predict the “future” social order and system which applies today.

### 2.3 Western Economists and Their Theories

Clusters as a business phenomenon is part of or under the laws and principles in Economics. In history, there have been some Chinese economists attempting to sort out the laws of Economics. However, their contribution to China and the world has not been as great as the Western economists such as Adam Smith and Alfred Marshall, and later Nobel Prize winners in Economics. Max Weber considered China and India to have missed out on a very important stage in history, which was Capitalisation. The long duration of a feudal system pushed down attempts in free trade. Therefore, contemporary China undertook two forms of development processes: capitalisation and communism. Even though during the feudal system there is not obvious evidence of capitalisation from a political perspective, business activities in the Qing Dynasty was approaching the form of capitalism and is normally
considered as the start of capitalism in China. However, due to the restrictions by the feudal system and closing strategy to the outside world for over a hundred years, the inner fire of capitalism did not burn out. In order to understand the tension of different groups in feudal society, understanding modern economics is as important as the classics in order to gain complete understanding.

2.3.1 Adam Smith and the Wealth of Nations

Adam Smith was born in 1723 and died in 1790 (Adam Smith Institute 2010). He was a Scottish moral philosopher and a political economist who was a key figure during the Scottish Enlightenment. Smith entered the University of Glasgow at the age of fourteen and studied moral philosophy who nurtured him with liberty, reason and free speech (Bussing-Burks 2003). Although he was granted a scholarship to attend the Balliol College at the University of Oxford, he considered education in his hometown was far superior to that of Oxford. However, in the large library of Oxford, Smith taught himself many subjects. Later in 1751, he gained a position as a teacher at Glasgow University and published The Theory of Moral Sentiments in 1759 in Glasgow. After this publication, he starts to shift his focus from moral philosophy to jurisprudence and economics. In 1776, Smith published The Wealth of Nations, which he spent ten year in writing. The book won instant success. Compared to hard sciences, humanity is interactive between different fields, such as philosophy, politics, and economics.

The book had an enormous impact among the rising bourgeois of Europe and the freshly independent United States of America (Smith 1776). Similar as Carl Marx was to China, Smith provided the theoretical cannon for the growing bourgeois to strike back against Feudalist bureaucracy and philosophy. He lays the foundation of capitalism. The full name of The Wealth of Nations is An Inquiry into the Nature of Causes of The Wealth of Nations. The book is made up of five small books. Book I was on the causes of improvement in the productive powers, on labour, and on order according to which its’ produce is naturally distributed among the different ranks of the people. He put the division of labour in front of others, discussing the principle which gives occasion to the division of labour and the limitations by the extant of the market. Beside the division of labour, he also discussed the basic elements of economy such as money, price, wages, stock, and rent. These elements have become a crucial part of microeconomics today. Book II was on the nature, accumulation and employment of stock. Smith discussed division of stock, the expense of maintaining national capital, the accumulation of capital, productive and unproductive labour, stock lent at interest and the different employment of capitals. This section is also included as part of macroeconomics today. Book III was on the different progress of opulence in different nations, which is actually the wealth of nations. He argued on the natural progress of opulence, discouragement of agriculture after the fall of the Roman Empire, the rise and progress of cities and towns after the fall of the Roman Empire, and how the commerce of towns contributed to the improvement of the country. Book III is beyond country borders and talks about groups of countries, cities and towns; it is about the world economy. Book IV is
on systems of political economy. He explored the principle of the commercial system, restraints upon the importation from foreign countries of such goods as can be produced at home, the extraordinary restraints upon the importation of goods of almost all kinds from those countries with which the balance is supposed to be disadvantageous, drawbacks, bounties, treaties of commerce, the motives for establishing new colonies, conclusion of the mercantile system, agricultural systems which represent the produce of land as either the sole or principal source of the revenue and wealth of every country. These topics are not only part of political economics, but also included in international economics now. Finally, Book V was on the revenue of the sovereign or commonwealth. This section foresaw the future to have a common wealth nation or economic zone and provided the guidance for revolutionaries to construct a better nation breakout from feudal society to capitalism. This section covers the expenses of the sovereign or commonwealth, the sources of the public revenue of society, and public debts. *The Wealth of Nations* covered nearly all the main streams in economics, and provided the roadmap of what economics should be about. Understanding *The Wealth of Nations* is the key of understanding modern Western economics, capitalism and the history of independence of the United States of America. Smith’s theory is not only applicable in the West. He discussed the principles in economics which governs business activities around the world. In order to better understand Chinese economy, we need to understand not only Marx, but also giants like Adam Smith, who present the general economic development of the nations, the very fundamental factors in economics and the relationships between land, labour, and capital. Only then can we study traditional cultural clusters better and in greater depth.

### 2.3.2 Alfred Marshall and Principles of Economics

English economist Alfred Marshall was born in 1842 and died in 1924. He is considered to be the founder of “new economics”; establishing a discipline concerning social welfare (Answers, 2010). Marshall was born in London and graduated from Cambridge University. Differing from previous social economists, Marshall held a degree first in mathematics then molecular physics and metaphysics, before shifting to ethics, psychology and finally economics. Similar to Smith, Marshall was interested in moral science, ethics and political economics. However, going back 100 years to Smith’s time, there are not as many disciplines as for Marshall. The discussion of political economy in *The Wealth of Nations* was not an independent subject, but just an issue waited to be classified and settled. When knowledge is clearly defined into subject areas, it becomes harder to cover many subject areas as the knowledge in disciplines grows faster and has their own expertises. From strict hard sciences like mathematics and physics to humanity, and finally in economics, knowledge and wisdom about the nature and the social world are all inter-related. His most famous publication is *Principles of Economics* (1890) – a revolutionary work in economics (Economy Professor 2010). Other works includes: The Economics of Industry (1890), Elements of Economics of Industry (1892), and Industry and Trade (1919). With the blood of a mathematician, Marshall created the new economics as a rigorous discipline with its own content and method by using
econometrics. He said goodbye to political economy and stopped it from entering the twentieth-century. Marshall laboured constantly to develop and polish his economic ideas and deepen his own understanding by grasping both existing economic literature and the economic reality of his time.

In the book of *Principles of Economics*, Marshall emphasised that price and output of goods are determined by both supply and demand. The two curves cross at equilibrium; this is a fundamental theory in microeconomics. Consumer surplus and producer surplus is another key concept of Marshall’s work. The surplus calculation measures the change in country well-being by imposing taxation, which is now named as welfare economics. The condition of Marshall’s theory has three phrases: firstly, when the amount of time for which the stock of a commodity is fixed; second, in short period of time, the supply can be increased by adding labour and other inputs without increasing in capital input; finally, in the long run, capital input increases (The Concise Encyclopedia of Economics, 2010). Marshall, with a sense in psychology and philosophy, perceived economies evolve during times impacted by technology, market institutions, people’s preferences and human behaviours. From Adam Smith, we learnt the “invisible hand of the market” and with Marshall we understand the basic laws in human behaviours in business. Marshall impelled to economics out of a heart of mercy; he considered the study of the causes of poverty was the study of the causes of the degradation of a large part of mankind (Economy Professor, 2010). As without improvement in economic conditions first, the majority of the population will have little progress in habits, aspirations and self-esteem. In order to improve the quality and character of the population, the standard of living has to be improved.

Marshall’s theories are applicable to the topic of this thesis – studying on the Chinese traditional cultural clusters. His *Principle of Economics* give explanation of business behaviour and activities in clusters. He also contributes to the economics of industries whereas industry is one of the most important and mature topic before clusters. Industries are the components of clusters and go beyond clusters. Marshall perceived economics as an evolutionary process; so as clusters. Explorations on traditional clusters believe that clusters evolve and reveal themselves in different forms, relationships and dynamics, just like a biological body.

2.4 The History of Jingdezhen

During the Period of Disunity (221-589), there was a famous potter named Zhao Kai who invented new quality control technologies, which helped improve the total quality of Jingdezhen porcelain (see P1 in Figure 1). He was honoured as ‘The Father of Porcelain’. Before Zhao Kai, porcelain from this area exhibited good design but low quality, and had been rejected by the Royal Court (Xu, 2007). Due to the dramatic improvement in quality, the Royal Court began to place orders from the town for porcelain lions and elephants. However, some historians believe that the Jingdezhen porcelain industry started in the Tang dynasty (618-906), because Jingdezhen gained its fame in porcelain production commencing in that
era (see P2 in Figure 1). Two potters, Tao Yu and Huo Zhongchu, made high-temperature fired pottery, known for its translucence and often referred to as ‘artificial jade’. Therefore, emperors appointed Jingdezhen to make porcelain for imperial use (Sjostrand, 2007).

Figure 1: Timeline of the Jingdezhen Porcelain Cluster Development

(Designed by author 2008, sources from Cotterell (2006); Jiangxi Government Website (2007); Jingdezhen Industrial Park Website (2007); Zhuang (2008))

Prior to the Five Dynasties era, there are only records in books about the porcelain production activities in Jingdezhen. Beginning at that time, archaeological searches have identified at least four kiln centres, each with at least thirty kilns. The water absorptivity and transparency of those antiques had reached contemporary standards. The Song dynasty meant a lot to Jingdezhen (see P3 in Figure 1), not only because it received its new name – Jingdezhen – but also because it became the porcelain centre for all of China. During the civil war in the Song dynasty (late 1100s and early 1200s), the most famous kilns in the North were destroyed, and the political centre shifted to the South. At that time, the Royal Court did not create new kilns for imperial wares. Instead, after receiving production requirements from the court, Jingdezhen summoned all the best potters from the North and South together to design, choose, and fire the best wares possible. It is likely that this communal collaboration between the different potteries and kilns lasted until at least the fifteenth century, when private kilns are known to have assisted official kilns with imperial orders (Sjostrand, 2007). There were more than three hundred kilns in Jingdezhen during the Song dynasty, with the resulting porcelain distributed throughout China and also sent overseas. Thousands of pieces were
exported annually to the Middle East, India, and Southeast Asia. With the increase in reputation, Jingdezhen gained enormous competitive advantage over the other porcelain clusters in China (Joy Furniture Net, 2007). In 2006, Chinese archaeologists discovered three Song kilns in Jingdezhen, providing precious resources for research (Zhang, 2007).

The Yuan dynasty lasted less than a hundred years; however, the porcelain development during this period was magnificent (see P4 in Figure 1). Although large quantities of porcelain were exported from the ninth century, it was the Yuan dynasty that significantly expanded maritime trade. Chinese goods eventually reached the whole world; nonetheless, their full impact would not be seen until the fourteenth century (Sjostrand, 2007). From the Yuan dynasty, emperors started to send their officials to govern the manufacture of royal porcelain. The first porcelain office was set up in the Yuan dynasty, and the first exclusively royal kilns were built. Jingdezhen then gained a monopoly over the best natural resources. The classic styles of blue-and-white and colour glaze, were particularly popular during the Yuan dynasty. A number of technical and decorative achievements also took place in Jingdezhen, including the most significant technological breakthrough in clay material mixture, termed the ‘two ingredients technique’ (Jiangxi Government Website, 2007). The two ingredients technique involves adding liquid China stone proportionally with kaolin. By using different proportions of the two clay bricks, different types of wares were made. For finer wares, more kaolin was required; this allowed sharp details to remain secure during firing. On the other hand, China stone was required for translucency. Before the Yuan dynasty, potters only used kaolin as their basic clay.

Based on achievements during the Yuan dynasty, the Ming dynasty experienced even more rapid development in porcelain production (see P5 in Figure 1). The four features of porcelain production activities at that time were: high production volume, high quality, diversity in designs and styles, and broad distribution channels (Joy Furniture Net, 2007). Jingdezhen was called ‘the city of all day thunder and lightning’. The first ruler of the Ming dynasty, Emperor Hongwu, prohibited international trade, yet the porcelain industry of Jingdezhen continued to flourish. During the Ming dynasty, the Royal Court set up the royal porcelain factory. They gathered all the best potters and resources in Jingdezhen and invested heavily in porcelain production. Some world famous porcelain pieces were produced during this time. The royal factory began with 20 kilns, reaching a maximum of 80. There were also 900 private kilns in addition to the royal ones, with more than 100,000 potters living in Jingdezhen. Porcelain production during the Ming dynasty achieved high specialisation with clear divisions of labour. The production procedure involved up to 72 steps (Jingdezhen Government Website, 2007). The first significant discontinuous production of porcelain took place during the civil war in the late Ming dynasty and Early Qing dynasty (see War I in Figure 1).

Jingdezhen porcelain production in the Qing dynasty included all varieties produced during the Ming dynasty. During the reigns of Kangxi, Yongzheng, and Qianlong (see P6, P7, and P8 in Figure 1), the production process was upgraded three times. Jingdezhen porcelain
become even more famous domestically and internationally. French Jesuit missionary Père François Xavier d'Entrecoulles (1698) made complete records of the porcelain production system in Jingdezhen. His research and documentaries helped porcelain technology development in the Western world. He was later appointed as an officer of the Royal Court during the reign of Kangxi (Wikipedia, 2007). In the early 14th century, blue-and-white porcelain had rapidly become the main product line in Jingdezhen, reaching the height of technical excellence during the reign of the Kangxi Emperor (Wikipedia, 2007). In addition to blue-and-white porcelain, there were many decorative innovations including qinghua (blue-and-white), wucai (famille verte), and susancai (famille noire). During the reigns of Yongzhen and Qianlong, one of the most popular decorative techniques reached perfection – famille rose (Stuart, 1994). Besides famille rose, there were also doucai, falangcai, and other colour-glazed techniques (Xu, 2007). Ying Tang was a porcelain officer living in Jingdezhen for about thirty years during the reign of Qianlong. His kiln is known as the ‘Tang kiln’. The quality of his production is considered to be the highest in history (see Historical Peak in Figure 1). Tang was actually more a researcher than a government officer. Experienced as a potter, he also wrote the most famous porcelain articles during this time.

After the Empire, China underwent a period of instability. In 1855, the royal porcelain factory was closed. Later, the struggle to set up Jingdezhen Porcelain Limited in 1910 ended when civil war destroyed the plan. In 1929, the National Party established the Department of Porcelain in Jingdezhen; this effort also did not last long before the Japanese invaded China. During the Sino-Japanese war (see War 2 in Figure 1), most of the kilns in Jingdezhen were damaged, with only about 30 remaining. In 1949, only about a hundred studios and 1000 workers were identified in the area; the cluster was nearly destroyed. After 1949, the industry was restored a bit (see P10 in Figure 1), but the Chinese Cultural Revolution (1966 to 1976) nearly removed the entire industry from Jingdezhen. During this period, most porcelain experts were persecuted; all porcelain enterprises and education institutes were forced to close; all technicians became farmers in the countryside; clay fields misused for other purposes caused great damage to the natural resources. Through 1976, the production of ‘Class A’ porcelain was reduced to a meagre 20% with a total loss of 13 million Yuan in Jingdezhen (Xu, 2007).

2.5 Chapter Summary

This chapter illustrated the background literature of Chinese traditional cultural clusters as a whole. Firstly, it examined traditional Chinese thoughts. For over a thousand years, the most influential philosophers in history were Confucian and Lao Zi. The current philosophies and guiding business principles are developed based on their teachings. Their influences are not just in theology, but also in the form of arts, culture expression and business practices. The most influential Western theorists in China are Karl Max with Communism, with Émile Durkheim and Max Weber in sociology. The influences of Western economists and their theories were illustrated. Adam Smith with the Wealth of Nations and Alfred Marshall with Principles of Economics are honoured and be considered to be the most popular economic
classics in China. Finally, the history of Jingdezhen was reviewed as part of background literature, which gives the context of this project.

The background knowledge provided by Chapter Two will benefit Chapter Three by framing the substantive area of this project and giving more freedom for this research to link with fields beside business and management, such as sociology and economics. The content of the background literature reassures that Grounded Theory is best suited for this research project, as it is more exploratory-oriented and fits with the nature of research. The background literature expands the horizon of this research by providing the linkage between business and management concepts – clusters with sociology, philosophy and economics. This will certainly assist in developing a more holistic and open sampling and coding system by keeping the ideologies in mind. The research design in Chapter Three is guided and influenced by the background literature review.
CHAPTER THREE: RESEARCH DESIGN

This chapter is developed in the environment created by the background literature review. The function of Chapter Two was to release this research from business boundaries and connect it with a broad context in sociology, philosophy, economics and history. This chapter is about how to design the research procedure to best suit exploration in Chinese traditional cultural clusters. First will be the discussion of the dominant research method – Grounded Theory. How to combine the strength of Glaser and Strauss and develop a suitable research design for the research topic is another focus. Normal structure and application of Grounded Theory will be included. The unique characteristics of Grounded Theory as a qualitative research instrument have to be identified. Secondly, Grounded Theory could not work by itself; it has to work with other research methods like interviews, observations, literature, questionnaires etc. Among a pool of research methods, which are the most suitable and available methods to cope with Grounded Theory in this research is discussed. Thirdly will be the design of research procedure – how to prepare for fieldwork, how to collect data and how to analyse data. Finally, ethical approval will be planned for fieldwork and data collection. It will include the process of applying ethical approval and finalised approval at the end.

3.1 Application of Grounded Theory

Grounded Theory is the fundamental research method of the research. It determines data collection, and data analysis. It also guides how to conduct field work. In order to succeed in generating theory, it is very important to have a workable research procedure design combining Grounded Theory with other sub research methods such as interviews. The application of Grounded Theory will be divided into three parts. First will be a discussion between Glaser’s approach and Strauss’s approach. As the originators of Grounded Theory, questions need to be answered, such as why they went opposite to each other, and is it possible to combine the strength of both and when to make a choice between? Following this, a discussion about the choice of research methods will be presented about how to collect data and what are their strengths and weaknesses. Finally, the procedure design based on Grounded Theory will be presented.

3.1.1 Glaser’s Approach vs. Strauss’s Approach

The debate between Glaser’s approach and Strauss’s approach goes on for over a decade. Methodological differentiation between the two founders arose consequent to the publication of *Basics of Qualitative Research* by Strauss and Corbin. In this later publication, Strauss denied and rejected many of the key points which Glaser treasures. Two letters from the book
Basic Grounded Theory Analysis by Glaser 1992 shows disappointment and disagreement of Glaser towards Basic of Qualitative Research. In the letter of Jan 1991, Glaser asked Strauss to withdraw Basics of Qualitative Research as it engaged in neglecting 90% of its important ideas. Glaser considered the book a whole different method that should not be called “Grounded Theory”. The issue was to him as serious that it would “leave[s] out quantitative researchers and will wreck the work of qualitative researchers too” (Glaser, 1992, p.2). Glaser argued the later book of Strauss cannot produce Grounded Theory, but “a forced, preconceived, full conceptual description”, which is no longer Grounded Theory. In short, Glaser considered that, for many reasons, Strauss’s later book was no longer Grounded Theory as identified in their co-authored book in 1967.

To make it clear, Glaser discussed the differences from the origin of Grounded Theory in contrasting with the Straussian approach. First, the logic of Grounded Theory is to ask two formal questions without preconception: 1. What is the chief concern or problem of the people in the substantive area, and what accounts for most of the variation in processing the problem? 2. What category or what property of what category does this incident indicate?

In order to answer these two questions, the researcher has to constantly keep comparing the incidents, and coding and analysis must be conducted patiently, without forcing the data, waiting for and trusting that emergence will occur. This is opposed to the Straussian approach, which involves not asking these questions and interrupting true emergence by asking many preconceived, substantive questions such as what is really going on, what is really at issue for the respondents, etc. The true nature of the data is then lost. Glaser agreed that Strauss’s approach is easier for students to use without the fear of failure or not finding something.

The following chart (Table 2) provides comments regarding the differences between the Glaserian and Straussian approaches by a selection of some recent researchers.

Table 2: Comparison between Glaser’s and Strauss’s Approaches

<table>
<thead>
<tr>
<th>Researcher</th>
<th>Glaser</th>
<th>Strauss</th>
</tr>
</thead>
</table>
| Douglas (2003) | 1. Argue for the necessity for the researcher to be more creative and less procedure-oriented in methodologically approach  
2. Allows issues to emerge in the course of research process  
3. Researcher decides the identification and specification of research issue  
4. Prefer a more general analytical method in its frame of reference  
5. Methodological approach is | 1. Recommend a more linear approach in methodology  
2. More specific and prefer to identify a phenomenon or issue for study  
3. Researcher predetermine the general subject of enquiry before entering the field  
4. Prefer more structured set of analytical steps  
5. More prescriptive in specifying the steps to be |
<table>
<thead>
<tr>
<th>Methodology</th>
<th>Description</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grounded Theory</td>
<td>Focus on methods and forcing structure on data and free from preconceptions</td>
<td>Continue to refine the coding technique, let researcher become more active</td>
</tr>
<tr>
<td></td>
<td>No substantive literature review, but research from unrelated field (Glaser, 1992, p.32)</td>
<td>Provide a more structural and linear approach</td>
</tr>
<tr>
<td></td>
<td>Remain faithful to the original description of Grounded Theory in 1967 and develop extension of the original</td>
<td>All kinds of literature can be used before a research study begun (Strauss and Corbin, 1990, p.56)</td>
</tr>
<tr>
<td></td>
<td>Using substantive literature would bring assumption about what is in the data</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Use literature after theory emerged</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Refer full conceptual description, and incorporates analytical techniques and denote a set of well-developed categories – systematically interrelated to form a theoretical framework</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Involves using the literature to identify phenomenon and analyze the data predominantly through deduction</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Second body of literature could be woven into the emerging theory stage</td>
<td></td>
</tr>
</tbody>
</table>
Due to the debate above, the targets of the two researchers is very clear. Strauss’s strategy is to make Grounded Theory more workable by compromising the spirit of inductive research, and present a standard format or procedures to conduct Grounded Theory. It is easier to follow the track and succeed in interpreting data purposefully with a plan. On the other hand, Glaser sticks on the origin of Grounded Theory and attempts to protect the inductive nature of Grounded Theory. Due to the differences in methodology considerations, it appears that they are holding very different opinion towards the use of literature pre and after, research procedures, coding, freedom and creativity of researcher and how central concepts are generated (Table 2). The purpose of using Grounded Theory for traditional cultural clusters is for its inductive nature of exploration. It seems very hard to combine the strengths of both approaches, especially considering the theology background of it. However, theories are never perfect in all situations. According the nature of this research, there is room to argue specific steps in conducting Grounded Theory. As the method is originally used in Sociology, it is inappropriate to apply the theory without adjustment. Researchers should gain benefits from applying Grounded Theory in the business field, including management.

3.1.2 The Choice of Data Sources and Data Collection Methods

Grounded Theory guides data collection, but it is not a data collection tool. Methods like interviews, observations, field notes, photography, and archival documentary could bring rich data from the field. Following the spirit of Glaser, he encouraged to use rich data and keep constant comparison between different sources of data. This section will discuss the pros and cons of different data and how they are applied in research. Later on, the methods will be included in the research procedure and discussed as part of the design.

3.1.2.1 Interview – In-Depth Interview

Interviews are a traditional method in the qualitative research paradigm. The goal of the interview is to deeply explore the respondent’s point of view, feelings and perspectives. In this sense, in-depth interviews yield information. There are three types of interviews (Patton 1990): informal, conversational interviews; semi-structured interviews; and standardized, open-interviews. In-depth interviews are an open-ended interview and a discovery-oriented method suitable for describing both program processes and outcomes from the perspective of the target informants. In-depth interviews involve data collection and data recording for deeper meaning and understanding of responses. It occurs with one individual at a time to provide a more involving experience. This method can be used to explore topics in their own right to provide more depth about a subject or individual cases than a quantitative survey. Circumstances for in-depth interview are: complex subject matters, detailed information sought, busy and high-status respondents, and highly sensitive matters. Cluster issues are a complex subject matter and in-depth interviews could deal with this circumstance. Glaser (1998) discouraged the use of tape recording as the researcher is after important concepts and patterns, not details as in other more descriptive methods. Recording is time consuming and inefficient, and Glaser was very conscious of wasting time (Fernandez 2004). However, no
recording is very risky. It is better to have a record and transcript for future recall, especially when the research process takes a long time. The advantages of in-depth interviews are: it could remove the restriction by structured questions and answers about informants’ experiences and behaviour; it could have immediate access to the depths of informants’ experience and it is flexible of investigating the hidden meaning of spontaneous ideas and seemingly devious thoughts in connection with the items discussed. The limitations of in-depth interviews are: limited control over environment. The researcher may have to compete with disruptions and other problems to acquire quality information and the comparability of interview. There is a large gap between the informants; social status and knowledge and might have bias in conduction.

3.1.2.2 Observation

Observation is a method by which first hand data is gathered on programs, processes or behaviours being studied, and provides an opportunity to collect data on a wide range of behaviour to capture a variety of interactions and generally explore a topic – all within a natural setting. Observations can be flexible while searching for in-depth knowledge of the context. It requires an attitude of openness to an experience. Observations are useful during formative or summative phases of evaluation and understanding narrative language of a program or group of people with non verbal communication. It could help in understanding the community context. This research is inductive research, and relies on the belief that; observation could help to understand the cluster setting. Qualitative observation goes well with ethnography, narrative inquiry, phenomenology, and Grounded Theory. In contrast to testing ideas for deductive purpose, observations are developed for inductive purposes. Observers record their own experiences in order to understand the cultural universe from an interpretivist’s perspective and convey them into field notes (or other forms of records) within theoretical context of explaining their data. The advantages of observation are: it could develop a holistic perspective, and learn things that are invisible and beyond oral conversation. It exists in a natural, unstructured, flexible setting. The disadvantages are: time consuming and expensive, it also requires experiences and training in observation. The behaviour observed may be modified, and distort data.

3.1.2.3 Field Notes

A field note is a tool and record that contains the descriptions of what has been observed, usually in written or voice recorded form. It is required for most qualitative methods; they make up part of the data collection process and therefore should be considered in the qualitative design process. The researcher has to develop a system of note keeping; there is no universal way of note taking, but very much a personal style and issue. Field notes are fundamental to observers and are a fundamental part of work. They contain everything that is relevant and worth noting to observers for future recall and helping the observer to understand the context, setting and the nature of the issue. A field note should include the time, the place, the setting and social interactions, and also quotation of who says what. It
also contains the feelings, reactions, and reflections of the researcher in the process of observing. Field notes are not by a mechanical recorder; it should contain the insights, ideas and judgments of the researcher and these insights become part of the data of field work and recorded in the context of the field note. The main advantage of a field note is to get information and data beyond interviews or surveys and open to rich information including the setting, the atmosphere and interaction between social contacts, which is not possible to be included in interviews. It is based on observation, and become the hard evidence of what is being observed and reflected. The problems of field notes are the terminology and language used in the field notes are more subjective and emotional – they then become very hard to interpret. When a researcher gets into habits of recording interpretations and reflections, then he/she would have less descriptive recording. To inductive research like Grounded Theory, field notes might lead the research into preconceptions of what the researcher feel, but no what the data is about. Another problem of keeping field notes is how to standardise scales like “good” and “poor”. This might cause validity problems.

3.1.2.4 Historiography

Historiography is an empirical research paradigm using interpretive or qualitative approach which focuses on a chronology over a substantial period of time, in order to obtain a fuller and richer understanding of a situation or set of circumstances. Using historiography in this research is not to compete with Grounded Theory, but as complement in the understanding of traditional culture and its historical background. The archival resources are qualitative secondary data; it could be part of the data pool to gain better understanding. There could be evidence of a previous event that has special importance to determine how current decisions are made. There is a possibility of a current event being part of a cycle and understanding the nature of the cycle would help the current situation. In the former research, there are hard evidences showing the development of porcelain cluster in Jingdezhen is compiled with many life cycles (See Figure 1). Therefore, understanding the historical setting is vital to the centre of the research problem. The advantages of this research method are: it aids in appreciating and understanding a particular situation by tracking the origin of the circumstances that led up to it. It also provides contextualisation of the issue, thus improving the effectiveness of data analysis. The limitations are: the research method is only relevant in a limited number of situations. There needs to benefits of studying chronology of events. The process of recording history is inevitable bias. The aim of historiography is to add to the body of knowledge on a topic and facilitate the development of new theories – it aligns the spirit of Grounded Theory.

The sub methods of Grounded Theory are as above: Interviews, Observations, Field Notes and historiography. Generally speaking, they are not conflicting with the nature of Grounded Theory and could help enrich the data to reveal the facts in this case. These methods are complementary to each other, providing distinct advantages. The usage of triangulation of methods is taking different perspectives and angels to analyse and evaluate data. Discussion of these methods does not mean that they will all be included in data collection. They are appropriate options for researchers to conduct in the field work. However, in real practices,
they might encounter difficulties and may end up not included as data collection strategies. In order to remain creativity in data collection, other research methods could be employed, such as photography, focus groups, narrative inquiry, case studies etc. If any of these options are applied, a discussion of the research method will be included and also explanation of why the method was used. However, the research itself could be considered as one big case study, but applying Grounded Theory procedures. Observations and field notes will definitely be part of field work, but due to their limitation in interpretation, they might not be included in the core stream of data analysis in order to focus on more reliable sources. However, they will be included as additional information to the interviews as they will be collected during the same time period and will be complementing the data collected from interviews.

3.1.3 Discussion of Elements and Procedures of Grounded Theory

Section 3.1.1 discussed the differences between Glaserian and Straussian, Glaser’s approach is more preferable to this research topic; however, it is worth looking at the difference between the two processes (Table 3). The discussion of the differences between the two choices is presented in Section 3.1.1. The discussion below does not go back to the debate of preference, but carefully makes decisions about how to best use Grounded Theory in this project.

Table 3 Comparison between Straus’s and Glaser’s Procedures

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<tr>
<td>1. The concept-indicator model which directs the coding</td>
<td>1. Theoretical Sensitivity</td>
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<td>2. Data collection</td>
<td>2. Theoretical Pacing</td>
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<tr>
<td>3. Coding</td>
<td>3. Theoretical Sampling</td>
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<td>4. Core categories</td>
<td>4. Theoretical Coding</td>
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<td>5. Theoretical sampling</td>
<td>5. Theoretical Memos</td>
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<td>7. Theoretical saturation</td>
<td>7. Theoretical Sorting</td>
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<td>8. Integration of the theory</td>
<td>8. Theoretical Writing</td>
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<tr>
<td>10. Theoretical sorting</td>
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It is clear that Strauss’s procedures are prescriptive, while Glaser discusses different areas in Grounded Theory but does not necessary follow a process, especially as Strauss puts comparisons as a step but it is not included in Glaser’s procedure, as Glaser considers comparisons are ongoing and constant. It could not be a step but an instrument throughout. By comparing the procedures of the two founders and also the comparison between their theoretical approaches in Section 1.3.3, Glaser’s is chosen to be the approach for this dissertation as he tries to give more freedom and creativity to researchers. The application of
Grounded Theory in this project is a new application where no evidence shows any application of Grounded Theory in business cluster research. However, the logic of Strauss’s approach will also be useful to give guidance on the procedure, which is clearer. For better understanding of Glaser’s theoretical design, there are numbers of Glaserian scholars, e.g. Lehmann (2001) and Fernandez (Fernandez, 2004). They summarized Glaser’s construct, and develop a process model first by Lehmann and later refined by Fernandez. Figure 2 is the origin model developed by Lehmann (2001). From this model, it is clear that theoretical sampling is not one off but a starting point of a cycle of constant comparison until theoretical saturation. Sampling gets the data from the field for open coding, and generates categories from concepts. Theoretical coding the categories will result in either saturation or not yet saturated; if not, then go back from theoretical sampling again; if yes, then substantive theory emerges. Lehmann’s model is very straight forward and clearly presents the position of different elements and their interaction. However, the elements in the model need to be discussed in order to apply later for data collection and analysis.

**Figure 2: Grounded Theory’s Building Process Model**

![Grounded Theory's Building Process Model](image)


Fernandez’s (2004) model is based on the construct of Lehmann’s, and is more detailed (See Figure 3). It starts with entering the field. Rather than exclude coding in substantive areas, he includes the coding part as a substantive area. The most important development of this model is including memos and extant literature which Glaser considered to be very crucial in Grounded Theory generation. It is very important to notice that memos and extant literature are outside the substantive area; they guide and influence the coding and theory generation process and also are influenced and directed by categories and substantive theory. The memos are not completed in data collection, but refined through the whole process and the
extant literature does not emerge only from the “grounded” theory but also coding process and memos.

**Figure 3: Grounded Theory’s Building Process Model Updated by Fernandez**

Source: Fernandez (2004, p.85), developed and expanded from Lehmann’s 2001 Research Model

This research design will then follow Fernandez’s model. Elements from this model will be discussed in the following paragraphs.

### 3.1.3.1 Preparing to Enter the Field

Just like an army preparing for a battle, they must first prepare food, drink, weapons and as well as training physically and mentally. In *Theoretical Sensitivity* chapter 2, Glaser (1978) discussed the theoretical pacing; what researchers have to prepare before getting into Grounded Theory research. Glaser emphasises that researchers should have creativity in order to generate theory; furthermore, reading the literature and attending training seminars are important. Reading in Grounded Theory plays different roles in different stages.

One area is examining the publications on cluster research to identify the theoretical gap to be addressed in this research project. This research topic is a follow up of researcher’s previous dissertation on the confirmation of Porter’s cluster theory in Jingdezhen’s porcelain industry.
(Zhuang, 2008), and the results showed that traditional cultural clusters show different developing patterns comparing to contemporary clusters. The second area of reading is outside the field reading, or background reading, and is included in Chapter Two. This branch of literature is not to guide the theory generation, but help in understanding philosophical, social and economical phenomena in traditional cultural clusters. They provide ideas and inspiration, and enhance the degree of theoretical sensitivity. The third area concerns the site. Because Jingdezhen’s porcelain cluster has a history of 2200 years, it is worthwhile to track its history which more or less determines what happens in the cluster today. Reading about the site beyond history is the production techniques and technologies. These resources become the first part of sampling.

In terms of training seminars, the researcher attended postgraduate workshops (3-4 mornings), department seminars (fortnightly), higher education development centre qualitative research workshop (twice), and online forum of research scholars (monthly). In terms of research components in education, the researcher got credit in the Marketing Research Method course and attended the Management Research Method course. These trainings provided sound background in research and research skills. Some of them are directly related to Grounded Theory, and provided a list of important reference in this field.

### 3.1.3.2 Theoretical Sampling

“Theoretical sampling is the process of data collection for generating theory whereby the analyst jointly collects, codes, and analyzes his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges. This process of data collection is controlled by the emerging theory, whether substantive or formal” (Glaser and Strauss, 1967, p.45). “In the case of grounded theory, sampling begins as a ‘commonsense’ process of talking to those informants who are most likely to provide early information. This information is then analysed through the application of open coding techniques, or line-by-line analysis (looking for words and sentence in the text that have meaning), which should help to identify provisional explanatory concepts and direct the researcher to further ‘theoretically’ identified samples, locations, and forms of data” (Goulding, 2005, p.296). The general procedure of theoretical sampling is firstly eliciting codes from raw material from the beginning of data collection through constant comparison as the data pours in. Then, codes direct further data collection and repeat the cycle to generate various properties and categories until saturation (Glaser, 1978). A more straight forward presence of theoretical sampling is in Figure 2. Theoretical sampling continues until the very end of the research – including the write-up stage in order to maximise observation opportunities (Fernandez, 2004).

It is necessary to discuss the logic of theoretical sampling. There are several pairs of contradictory elements in Grounded Theory taking effect at the same time; for example: inductive to deductive. No doubt, Grounded Theory is an inductive research methodology in which theory emerges after data collection through analysis. It means the research is not
guided by certain hypotheses like in deductive nature research, e.g. in hard sciences. However, a deductive approach is still applicable - not to guide the research, but used to derive from induced codes conceptual guides as to where to go next, and guides subsequent theoretical sampling to generate theory. The deductive principle is below the inductive principle. Memos become a good way to record ideas, judgements and inspirations from data collection and coding, to theory generation. The memos then are deductive through inductive data collection to reveal the nature of the issue and case. Another pair is: conceptual and logical elaboration. Conceptual elaboration in sampling is the systematic deduction from the emerging theory of the theoretical possibilities and probabilities for elaborating the theory as to explanations and interpretations (Glaser, 1978, p.40). On the other hand, deductive elaborating is vital to the theoretical sampling phase. It is included as part of conceptual elaboration. The systematic deduction results in generating hypotheses from previous codes and guides the researcher back to the locations and comparative groups in the field to discover more concepts and interaction from raw data.

Data collection in theoretical samples will cooperate with other research methods in section 3.1.2. These methods will only affect what sorts of data to collect and how to collect them. They will not impact on how to interpret data as Grounded Theory itself has a mature construction of data coding. Once again, collected qualitative data made beyond the scoop of data from the methods from Section 3.1.2, and may not include some data like field notes for coding due to validity and reliability reasons. Choosing Glaser’s approach does not mean that the system Glaser developed and committed is entirely appropriate to the research of Jingdezhen’s traditional cultural cluster. For example, he disagreed to use tape recording for interviews (Fernandez 2004). This section is about the design of research, in real situations; some information might be harder or easier to obtain, so it is better to have a creative and open mind to welcome a variety of data and methods for theory to emerge.

3.1.3.3 Coding

The purpose of using Grounded Theory is to generate a set of categories and properties which fit work and is relevant for integration of a theory. Coding is the initial stage of this goal. In Figure 3, there are three different coding methods: open coding, theoretical coding, and selective coding. Open coding and selective coding belong to substantive coding; theoretical coding is another distinct category. Open coding is diametrically contrasted with a preconceived code, for which the data may be coded, irrespective of degree of relevance, which itself is hard to determine. There are two forms of open codes: substantive codes and theoretical codes. In order to improve the quality of coding, there are several rules to follow. Firstly, it is helpful to keep three questions in mind: “What study is this data for?”; “What category does this incident indicate?”, and “What is actually happening in the data?”. The three questions grant theoretical sensitivity to researchers affecting data analysis, collection, and coding. Secondly, data must be analysed line by line. Allan (2003) promoted another coding method which is called key point coding. Key point coding is much more efficient than micro-coding or word-by-word and line-by-line. The third rule is that the researcher
should do his/her own coding. Forth is always interrupting coding and spending time to keep memos about ideas. In addition, keep coding directly linked with theoretical sampling. Selective coding is to select code for a core variable and to cease open coding. It also indicates the researcher delimits his/her work for open coding and focuses on the analysis of one core variable. Theoretical coding conceptualises how the substantive codes (like open coding and selective coding etc.) may inter-relate as hypotheses to form a theory. Theoretical coding is also implicit that substantive codes can be related without it (Glaser 1978). Theoretical coding provides broad pictures and new perspectives through integrating concepts creatively and flexibly. The creativity and flexibility should remain grounded on data, rather than being abstracted from nowhere. It takes care of a group of coding families to generate a variety of concepts and explanation rather than focusing only one possible concept. Later in data analysis, it will introduce a more detailed coding system based on Glaser (1992, 1978, 1967), Lehmann (2001), and Fernandez (2004).

3.1.3.4 Generating Theory

Grounded Theory is about the process of generating a grounded theory (Glaser and Strauss, 1967). There are two forms of theories generated by Grounded Theory: substantive theory and formal theory. According to the descriptions of both theories, substantive theory is about minor working hypotheses of everyday life; and formal theory as “all-inclusive” grand theory. Jingdezhen’s porcelain cluster belongs to the latter category. In Figure 3, there is only substantive theory, no formal theory, but they are inter-changeable. Constant comparison and comparative analysis is the key of succeeding in theory generation. Constant comparative methods of qualitative analysis are divided into four stages: 1. Comparing incidents applicable to each category; 2. Integrating categories and their properties; 3. Delimiting the theory; and 4. Writing the theory (Glaser and Strauss 1967, p105). In order to generate theory, the previous stages in the Grounded Theory process are all very important. Glaser states that researchers should believe that theories will be generated. This mentality will encourage researchers to take a step further each time until theoretical saturation. The Grounded Theory method is time consuming like a marathon; whether 5km or 25km, there is an end.

3.1.3.5 Theoretical Memo

Theoretical memo is a core stage in generating Grounded Theory. Memos are the theorising write-ups of ideas about codes and their relationships as they strike the analyst while coding (Glaser, 1978, p.83). The four basic goals of keeping memos are to: first, develop ideas and codes; second, keep complete freedom and run openly; third, build a memo fund or store, whether small or large, for future writings and talks; and finally, maintain high sortibility. In order to keep high sortibility, Glaser developed six rules for memo writing in Chapter 5 of Theoretical Sensitivity (1978). The writing of memos starts as soon as open coding until theory formed (see Figure 3). Theoretical memoing is a process of comparison and conceptualisation. It compares indicator to indicator, then indicator to concept, and concept to category like a snow ball. Memos are generated from coding, but also previous memos. Some
other important rules about memo writing are: 1, keep memos and data separate; 2, always leave time for memo writing and repeat memoing throughout; 3, researchers can force to bring on a memo by starting to write on a code; 4, not being afraid of modifying memos; 5, keep a list of emergent codes handy; 6, comparing codes if the memo seems the same; 7, follow digression through conceptual elaboration basis; 8, leave it open; 9, discuss about conceptually generated patterns not about people; 10, deal with racing ideas one at a time; 11, indicate in memos saturation; 12, always be flexible in memoing techniques. These rules will definitely guide how to keep memos.

3.1.3.6 Extant Literature

Extant literature through the whole research process develops the researcher’s theoretical sensitivity and knowledge on grounded concepts. Extant literature includes literature that is a source of data to compare with existing grounded data. In this research, information about the history and the techniques and technology of porcelain crafts belong to this category. Secondly, pre-research background literature outside substantive areas of research is also important to inspire the researcher, enhance theoretical sensitivity and give new ideas about how to code data and conceptualisation. Finally substantive literature will be covered to compare with “grounded” theory and position the research into the relevant research body. More discussions about the use of literature are in Chapter One and Chapter 3.1.

3.2 Validity and Reliability Check

Grounded Theory is considered to be the most rigorous theory amongst qualitative methodologies. The reasons could be: firstly, constant comparison throughout the whole process of research; second, systematic coding and analysis, which make data analysis explicit for readers and have a very high degree of transparency; third, well-structured documentary, especially memo writing. Readers can track how categories are formed from concepts through memos. Data and memos are separated clearly that keep the inductive power of data and deductive creativity in generating hypotheses in memo writing. Glaser balanced the two well, but in terms of validity and reliability checking, Strauss and Corbin take a step further. Their criteria will be employed for evaluation (see Table 4 below).

Table 4: The Research Process Criteria

1. How was the original sample selected? On what grounds (selective sampling)?
2. What major categories emerged?
3. What were some of the events, incidents, action, and so on that indicated some of these major categories?
4. On the basis of what categories did theoretical sampling proceed? That is how did theoretical formulations guide some of the data collection? After the theoretical sample was carried out, how representative did these categories prove to be?
5. What were some of the hypotheses pertaining to relation among categories? On what grounds were they formulated and tested?

6. Were there instances when hypotheses did not hold up against what was actually seen? How were the discrepancies accounted for? How did they affect the hypothesis?

7. How and why was the core category selected? Was the selection sudden or gradual, difficult or easy? On what grounds were the final analytic decisions made? How did extensive “explanatory power” in relation to the phenomena under study and “relevance” as discussed earlier figure in the decisions?

Source: Corbin and Strauss 1990 pp. 16-17

The importance of this list is to provide an inspiration of what aspects of the research might require more careful validity checking. By keeping the list in mind, the researcher is able to avoid systematic mistakes and biases. However, this list is not perfect in any way, but gives researchers guidance of developing lists to best suit their particular research interest. It is worthy to return to this list and answer the questions before theory is generated.

3.3 Ethical Approval

Ethical protocol is a compulsory procedure of the University of Otago (the researcher’s university) for conducting research which involves contact and communication with people. It encourages researchers to treat ethical issues seriously in order to protect human rights while getting information from people. At the same time, the ethical approval application itself is a vivid piece of work that provides solid support and protection for researchers if anything goes wrong later. It is considered an independent piece of research statement and declaration that fits the construct of a research. Finally, it also involves experts in the field and experts in methodology to double check the research design; if it is workable, valid and reliable, and become part of valid evaluation in the initial stage or planning stage of the research.

It takes a very long period of time to get ethical application approved. The complete version of application was handed to researcher’s supervisor on 19 July 2008. Some amendments were added to a newer version on 22 July 2008 and handed over to the department ethics committee, Sara, for departmental approval. Sara sent back the document on 30 July 2008 and required to add several amendments to the application. It took another two days to modify the document to meet the departmental standard and was signed by the head of department on 1 August 2008 (Appendix 8.2.2). After that, the application was sent by the department to the University Human Ethics Committee. On 12 August 2008, the committee gave a reference code to this document and stated that the application was waiting to be reviewed in the next committee meeting. 22 August (Appendix 8.2.3) 2008, the committee sent a conditional approval and recommended some modifications to refine the document. Then, after fixing all the spots required, a full approval was provided on 29 August 2008 (Appendix 8.2.4). Appendix 8.2.1 is the final version of ethical approval with Chinese
translation. It took five to six submissions with refinement to gain ethical approval. Throughout the process, the researcher experienced the pressure and struggle to get it done, which is very similar to the experience of conducting Grounded Theory which has no due date of completion from the beginning.

3.4 Chapter Summary

This chapter explores the research design of applying Grounded Theory in generating theory for Jingdezhen’s porcelain traditional cultural cluster. As the leading methodology, Section 3.1 started with discussions of Grounded Theory application used in this research. Three main areas have been covered. Firstly, an old debate was included: the differences between Glaser’s and Strauss’ approaches. Through a thorough exploration in the original works of both founders of Grounded Theory, and later discussions of the same topic by other researchers, Glaser’s approach seems more suitable for the chosen area of research, which promotes creativity, freedom and inductive nature of data. However, it does not necessarily mean that Glaser’s construct could fully apply to research on Jingdezhen’s porcelain cluster, yet it will involve some recent updates and developments in Grounded Theory, such as Fernandez (2004) in Grounded Theory model, and Allan (2001) in developing key point coding. Later, some other research methods included in the research design – interviews, observations, field notes and historiography are discussed. Through discussions of pros and cons, the data library will be made up of interviews from Beijing and Jingdezhen as well as field notes from the two places. Finally, procedures and elements from Fernandez are clarified (2004). Most of the design is based on Glaser’s Theoretical Sensitivity (1978). After Grounded Theory, the research design also included validity and reliability checks. The criteria used are developed by Strauss and Corbin (1990). At the end of this chapter, the ethical approval application is discussed, the process of getting approval sharing similarities with the process of conducting Grounded Theory, which also takes a long time without a due date and keep refining until approved (Saturation). In the following chapter, the research design and construct will be applied. It concerns field work and how to get data from field, sampling the data and data coding. This chapter is about application and is the most significant part of Grounded Theory.
CHAPTER FOUR: THEORETICAL SAMPLING AND CODING

Alongside to the research design in Chapter Three, Chapter Four combines field work, sampling and coding. Due to the nature of Grounded Theory, the two sections form essential parts of the theoretical cycle working towards saturation and theory generation. Theoretical sampling is the process of data collection for generating theory whereby the analyst jointly collects, codes, and analyses his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges. This process of data collection is controlled by the emerging theory, whether substantive or formal (Glaser and Strauss 1967, ch3). In a word, theoretical sampling involves data collection in all stages; it includes what to sample, where to sample, why to sample, how to sample and when to sample. In the following paragraphs, the initial field work preparation will firstly be discussed. It will answer the five questions before data collection. Coding is the bridge between data and theory; it includes substantive coding and theoretical coding and the discussion between the two was in the previous chapter. In this chapter, different coding strategies alongside the research process will be presented either for further sampling or for forming concepts, categories and finally theory.

4.1 Fieldwork and Sampling

In this section, initial fieldwork preparation will be illustrated. There are two stages in preparation: first is in the initial stage of the master program; second is the middle stage of the master’s program, which generated two sets of data. The fieldwork from Beijing and Jingdezhen are then discussed separately. They form the two main locations for holding interviews. After that that is the first trial of coding, followed by the final structure of the Grounded Theory process.

4.1.1 Initial Fieldwork Preparation

The fieldwork preparation can be divided into two parts. First was at the beginning of the research project from early 2007 to early 2008, and later is before data collection in mid 2008. Because Jingdezhen’s cluster research was part of the researcher’s postgraduate project in 2007 and was presented in an international conference (2008), the planning for the Master’s thesis started in 2007. The initial project using historiography, however the quality of data was not very good as the researcher did not go to Jingdezhen herself and could not collect quality empirical data from the site. However, through secondary data research, the researcher developed a research literature list contains part of the most important research and publications. In 2008, the supervisor of the researcher went to Jingdezhen during an academic trip to retrieve the literature. Finally, he managed to get three highly relevant
publications about Jingdezhen’s porcelain industry, porcelain in China and porcelain making techniques. These are very precious resources as all these books have limited editions and could number only a few thousand prints. However, these resources could not form the main body of data as they did not talk how Jingdezhen’s porcelain cluster interacts and works. Therefore, these resources could be backup material to explain some phenomenon or extend data for theoretical sampling. The research method used is historiography, as the data itself contains phenomena for a period of time; not just at a point in history. Even the craft techniques were illustrated based on time duration.

Secondly, through previous research and literature research, the researcher targeted two figures to get quality data. The first one was Dr. Wang Jici. Wang is the pioneer of cluster research in China. Her publications and contribution to Chinese cluster research is enormous. In order to understand Chinese traditional cultural clusters, it is between understanding and researching current cluster research in China and their findings. A Chinese version of Wang’s profile is included in Appendix 8.3.1.1. The second figure was Dr. Fang Lili. Fang was teaching at the Jingdezhen porcelain art college before becoming a professor at the Chinese National Academy of Arts. This is the most honourable Chinese research entity in Arts. Fang has very rich publications about Jingdezhen where she was born and bred. Her publications were considered to be canon in Jingdezhen’s porcelain industry; not just about techniques but about its changes, developments and also holistic view of the industry (cluster). The Chinese profile of Fang is included in Appendix 8.3.1.2. Normally, researchers will enter the field with informal contacts with scholars from relevant fields and pay informal visits or make some phone calls. However, because the researcher of this project attempted to apply for overseas research funding, the contact with these two scholars endured a formal process. Firstly, a request email was sent to each of the researcher (See Appendix 8.3.2.1 and Appendix 8.3.2.2). Not long after, the researcher of this project won an Invitation for Collaborative Research from Peking University organised by Dr. Wang Jici in April (Appendix 8.3.3.1). Peking University is the best university in Social Sciences in China. Dr. Fang Lili wrote an email for confirmation on collaborative research (Appendix 8.3.3.2). As an anthropologist and head of many tangible and intangible heritage projects, Fang did not email this researcher until she returned from field work. She is an energetic researcher who is tireless in her ongoing anthropology projects and writing books. Her husband is a famous porcelain artist from Jingdezhen and gained fame around the world through exhibitions.

Beside the two figures, Beijing and Jingdezhen were targeted as destinations. Beijing is the centre of academia in China. It has a rich number of relevant scholars in the area of cluster research like Dr. Wang Jici and researchers in the area of Jingdezhen porcelain like Dr. Fang Lili and her husband, who both live in Beijing. Interviews in Beijing with these scholars were used to guide the research direction and theoretical sampling of interviews in Jingdezhen. They also provided the scope of potential attributes of Jingdezhen through their experiences of other contemporary clusters and traditional clusters. Jingdezhen is the actual field of this
project. Most of the raw data about this industrial cluster had to be obtained in this particular geographical location.

Although in the end, the researcher did not get the award and funding, the collaborative research with the two scholars still took effect. The original planning was a two-month fieldwork in Beijing and Jingdezhen. Because these two locations are not close to either Dunedin (in New Zealand where the researcher’s university is based), or Xiamen (in China, hometown of the researcher), it seems impossible to have individual sampling, coding and then collecting new data following the route in Figure 2. Beyond the distance, because there was no scholarship or award to support the two trips (the two cities are far from each other), the strategy used was to gain as much as possible during the trip and using intuition and observation to guide the data collection process.

4.1.2 Fieldwork in Beijing

The first part of fieldwork was conducted in Beijing at Peking University in September, 2008 during the Paralympics game period (See Appendix 8.4.1). Because the swimming pool of Peking University was assigned to be the host of swimming games, the gatekeepers were very alert and examined every single person passing the gate. The researcher was stopped at the gate when going for an appointment with Dr. Wang Jici for the first time. The only way to enter the campus was for someone to show their ID and keep records of entering and leaving with a national ID card. It was very frustrating to go through the same process every time when entering the campus. However, Dr. Wang was very supportive and helpful. After a long fruitful talk with her, she wrote down some names that were potential interviewees in the cluster research field, including a lecturer and co-author of many of her articles. Because the order of the interview depends on their schedule, not on theoretical sensitivity of doing Grounded Theory, the goals of each interview became: firstly their research interests in clusters; secondly their opinions towards Chinese traditional clusters; and finally to bridge the interview with previous interviews to ensure the flow of information and continue similar topics and momentum from previous interviews. The interview transcripts are included in Appendix 8.4.1.3.1 to Appendix 8.4.1.3.5. During the interviews, the researcher attempted to draw their attention into the traditional cultural field. Because most of them are not researching this field, the feedbacks from these questions were very limited, shallow, and low in value, except from Xin Tong, an associate professor from Department of Urban and Regional Planning.

Tong is very interested in Chinese traditional culture and her hobby is antiques. Her talk was very inspiring and the researcher kept field notes after meeting with her (Appendix 8.4.1.3.6). In the following week, the research paid a visit to Panjiayuan, a very famous local antiques market in Beijing. In this market, there are a number of foreigners visiting the spot and buying different things from merchants. Through some informal interviews with the porcelain merchants and dealers in the market, most of them guaranteed their goods are real from ancient dynasties and mostly said they are from Jingdezhen! Some honest dealers said yes,
their products are from Jingdezhen but not from ancient dynasties but newly made. The proportion of porcelains in the market and the fame of Jingdezhen reassured that it is a very important spot to study traditional culture and clusters. Through visiting Panjiayuan, the researcher gained initial understanding of the antiques market, especially the market for reproduction ancient porcelains.

During the last week in Beijing, the researcher visited Dr. Fang Lili as well. Fang was busy and the first and second meeting both took place in very interesting locations. The first was at her husband’s exhibition at a Korean cultural centre. This meeting was informal; just get to know her and say hello. The second time, she invited the researcher to attend her departmental meeting as an outsider, and then invited the researcher to dine with her students and colleagues. Her flexibility and outgoing personality revealed her character as a genuine anthropologist. She is also knowledgeable about works in many humanity fields, is very sensitive to changes, and is constantly reading to discover something new inductively. Her works in Jingdezhen porcelain industry are considered to be the most valuable in the field. Her connection with Jingdezhen and porcelain from a well-trained anthropologist perspective produces insightful and constructive description and analysis from a higher stand. At the restaurant, Dr. Fang introduced three of her students to the researcher. One had already finished her PhD and become a researcher at the centre; the other two were Masters students. All three were currently working towards a big project on Jingdezhen. The superb thing was they also planned to go to Jingdezhen in October for their third visit, and they are very familiar with the city and porcelain industry. Thus, the researcher decided to live with the three researchers while in Jingdezhen. The researcher stayed in Beijing for three weeks and these three weeks granted the researcher valuable resources to access Jingdezhen.

The interviews with researchers in clustering could not be the dominant research as they are closely relevant, but to a broader extent. Similar to the resources from historiography, this part of research will also be discussed if the theory did not saturate itself. The interviews at Beijing were also practices for real fieldwork in Jingdezhen about how to conduct interviews and how to clear noises. The first interview with Dr. Wang Jici had a coding trial. This will be discussed later in the chapter. The interview with Dr. Xin Tong is also included as part of main data, as it has a very high degree of relevance. The research process of this project is firstly sampling is using historiography to get historical and technical data, then interviewing cluster researchers in Beijing, and finally interviewing stakeholders of the porcelain cluster in Jingdezhen which became the main body of research. Coding starts from interviews from Jingdezhen; then it shifts to interviews from Beijing, and continues with field notes from both locations. The data from historiography is big enough to be included as part of the extant literature which will provide good support if the first three sets of data could not be theoretically saturated; then they could get data from historiography and keep on coding to reach saturation. Moreover, keeping historiography in extant literature could also help to understand the theory from a field literature perspective. The purpose of the fieldwork in
Beijing and Jingdezhen is to build up a data library as designed below in Figure 4. According to Figure 4, a new analysing design will be planted into Figure 3 to form a new model.

**Figure 4: Sampling and Coding Order**

4.1.3 **Fieldwork in Jingdezhen**

The difficulty of doing sampling and coding together is time pressure. The logic of collecting all the data at once is to ensure the inductive nature through intuition driven by observation, interviewees and the environment. For example, the first interviewee is the landlord of the researcher. It was not pre-organised but by coincidence, which means that in Jingdezhen a significant number of people have direct or indirect relationships with porcelain such as the landlord. He is a government officer and his wife is a porcelain trader in Shaojiwu (A famous porcelain market in Jingdezhen. See Figure8 – the red star sign). The city planning of Jingdezhen starts around the people’s square and spreads out like a spin. Many famous kilns and porcelain factories are at the centre of the city within walking distance. The researcher and fellows from Beijing were living at Cuiyun Road (See Figure 5 – the blue cross). When the researcher noticed the special identity of the landlord, the first appointment was settled. Due to the result of the first interview, the interviewee suggested several spots that were worthy to explore including Fanjiajing (See Figure 5- the purple triangle), Shaojiwu, Xinmindu, Jinchangli, Porcelain World (Taocidashijie), etc.
Because of the interview with the landlord, Shaojiwu became the first spot to conduct research, followed by Fanjiajing. Fanjiajing is considered to be the centre of reproducing ancient porcelain and it was very close to researcher’s location. Fanjiajing was then chosen to become the dominant spot for research. When researching on Fanjiajing (See Appendix 8.4.2.1.1.), the researcher strongly felt a need to be equipped with knowledge of ancient porcelain production and history. There are two very famous tourist spots called Jingdezhen Porcelain Folk’s Museum, and Jingdezhen Porcelain Historical Exhibition District (See Appendix 8.4.2.1.2). After visits to these museums, the researcher returned to Fanjiajing for the second time and the quality of observations and in-depth interviews improved. Shaojiwu and Fanjiajing are both famous for reproduction of ancient porcelain trading and it is seldom to find contemporary porcelain there. During October each year, the Jingdezhen International Ceramic Fair occurs and several forums by experts are held during this time. In order to understand the latest developments and trends in Jingdezhen, it was necessary to attend the fair. Another reason is that Dr. Fang Lili was speaking at the forum. After the fair, the researcher interviewed some traders selling contemporary porcelain at Porcelain World (Taocidashijie), Guomao, the sculpture factory, etc.

Another branch of porcelain production of Jingdezhen is kitchenware. The production of kitchenware in Jingdezhen originally started from the 1950s and was produced by state-own factories. Nowadays, entrepreneurs either produce it themselves or buy brands from the state-own factories. Most of these entrepreneurs are originally from the factories, including former workers or members of the managerial board. The four branches of porcelain production continue the style from late Qing Dynasty. Among the artists in Jingdezhen, it is very hard to separate contemporary from late Qing style as most contemporary innovations are based on paintings from late Qing. However, from the outlook of porcelain it is still quite easy to tell whether it is late Qing style or new style. The icon of late Qing style porcelain production is
Yishucichang (Arts porcelain factory). Artists from the factory are still working there but not arranged by the state. They are artists yet entrepreneurs, each one is specialised in different styles and earn for themselves. Because the artists are integrated in one location, it is easy for national and international buyers to find and trade with them. This group of artists are well paid and paid the highest among the four categories of porcelain production in Jingdezhen.

The interview transcripts in Jingdezhen are included in Appendix 8.4.3. Not all interviews are transcribed as some voice records were of poor quality and could not be captured easily. Therefore, although 24 interviews were done in Jingdezhen, only 18 of them were transcribed. Figure 6 below illustrates the layers and division of Jingdezhen’s porcelain industry. In order for the reader to visually understand of the four categories, representative crafts pieces are presented in Appendix 8.4.2.2.1 to 8.4.2.2.4. However, this is only a very small part of the industry and could not capture the entire world of Jingdezhen porcelain. These categories will then guide data sorting and coding orders.

**Figure 6: Jingdezhen Porcelain Divisions**

4.1.4 First Trial of Coding

In the very beginning of fieldwork when first interview finished, the researcher followed the instruction to code the data immediately after the data was sampled. The example is Interview One with Dr. Wang Jici (See Appendix 8.4.1.3.1). After meeting with Dr Wang Jici on September 4 2008, she wrote down some potential interviewees in the researcher’s notebook and eventually there were five days between the first and second interviews. Therefore, the researcher had sufficient time to complete the first trial of coding and creating the transcript at the same time. The work process is presented as below in Table 5. Because the researcher was not living on campus, some time was wasted in finding the right direction to visit the campus for the first time. The worse thing was that was during the Paralympics, Peking University reserved one of the halls for holding the games. The gate keepers carefully inspected every person coming in and out and it took about an hour to get into the campus, including the time waiting for Dr. Wang Jici to come and meet up with the researcher. The
The interview was located in the departmental library of Urban and Regional Planning Peking University. Before the interview, the researcher chatted with professor Wang about previous research and the purpose of this research in detail. Dr. Wang Jici then received a copy of consent form for participants and the ethical approval documents (See Appendix 8.2.1) and signed. Under University of Otago policy, participants are respected and are free to answer or decline answering questions. The consent form is an agreement of respecting participants and protecting their rights in the interviews. The whole duration of the interview was 21:47 minutes. After the interview, there was a discussion about Dr. Wang’s research interests and the projects she is involved with, along with her PhD students who have co-papers in national and international journals. She took the researcher around the department and introduced the research interests of her students, in order for the researcher to gain some understanding about potential interviewees. It also give the researcher a choice of who to interview next.

Table 5: Interview One Task Timing Table

<table>
<thead>
<tr>
<th>Interview One Tasks</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field work</td>
<td>7 hours (before and after interview, including time to travel)</td>
</tr>
<tr>
<td>Interview voice record</td>
<td>21:47 minutes</td>
</tr>
<tr>
<td>Interview transcript (Appendix 8.4.1.2.1)</td>
<td>7 hours</td>
</tr>
<tr>
<td>Transcript translated into English (Appendix 8.4.3.1)</td>
<td>3 hours</td>
</tr>
<tr>
<td>Coding I (Appendix 8.4.3.2)</td>
<td>2 hours</td>
</tr>
<tr>
<td>Coding II (Appendix 8.4.3.3)</td>
<td>2 hours</td>
</tr>
<tr>
<td>Theoretical analysis (Appendix 8.4.3.4)</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Total duration</td>
<td>22 hours approx.</td>
</tr>
</tbody>
</table>

It was a pleasant interview with Dr. Wang Jici, as she is a very productive researcher and respected expert in the cluster field. The hard time came in transcribing the interview. It took two and a half days to transcribe the interview; approximately seven hours in total. It was very frustrating as it seemed like the transcription was endless. (This process accelerated with subsequent practice later). In the beginning, the researcher tried to translate the transcript, and it took another three hours to complete this (Appendix 8.4.3.1). It did not sound right to translate all the transcripts, as there are differences between grammar and way of expression between two different languages. It was a big struggle: Glaser did not talk about the language issue! Not even the other journal articles referred to this before this research. Rather, this researcher believed that there should be foreign researchers using other languages applying Grounded Theory and summarising the logic of when and how to translate the data. Instead of applying another structure and system into the current “heavy” structure, the researcher tried to code the data using different coding strategies (Appendix 8.4.3.2 and Appendix 8.4.3.3). The Coding strategies are based on Allan (2002)’s key point coding.
The first coding sheet (Appendix 8.4.3.2) is based on the Chinese transcript and followed sentence by sentence. The coding sheet use ABCD to represent the number of the interview and 1234 to represent the code. The code was firstly derived from data in Chinese and then translated into English. Secondly, Coding I was organised in a chart using only the English codes on the right hand side (Appendix 8.4.3.3). Then, similar codes are grouped and are classified into categories. In Appendix 8.4.3.4, the researcher attempts to carry out theoretical analysis based on the codes and emerging concepts from Coding I and II. However, it was not finished as developing theoretical analysis is kind of strange after coding. The analysis should be included in the coding process. The coding process needed to be refined based on the first trial. The unit of analysis will follow Glaser (Glaser, 1978, p.62), see Figure 7. In Figure 7, “I” represent incidents; incidents are indicators of concept (or category). In other words, incidents are coded from data, and codes form categories. Codes will be constantly compared to discover any similarities and differences, and consistency in meaning will result in construction of categories (Fernandez, 2004).

Figure 7: Concept Indicator Model

![Concept Indicator Model](image)


During the first trial in coding, it showed that the huge amount of time spent in translating all the documents were: firstly, not necessary; and secondly, it is better to code in Chinese than in English and when categories develop, then translate into English to generate theory. As mentioned before, Glaser even suggested to not transcribe interviews, saying that it was a waste of time. It is important to be mindful of the time issue as Grounded Theory itself is already very time consuming. Furthermore, the interview transcripts in Chinese were already over 120,000 words in total, and it is impossible for readers to go over the entire transcript word by word, even if translated into English. The key is to follow a logical way of coding rather than understanding every single word. Due to the complexity of this research, it was necessary to develop a more detailed model based on Fernandez’s in Figure 3, becoming Figure 7. Modifications include firstly the data library (mentioned in 4.1.2), after theoretical
sampling all data is reserved in the data library as three parts: Beijing interviews with cluster researchers, Jingdezhen interviews with stakeholders, and field notes. The reason of building the data library is that the field was far from the researcher’s home university and the period of data collection was limited, therefore, in order to make most of the trip, it is better to gather a grand database and waste no time coding in the field. This is a limitation of the fieldwork. However, the data collection process is not without order, and guided by theoretical sensibility and inductive interviews. Moreover, translation is now placed after category generated and before theoretical saturation. The coding will then follow the route of Figure 8. All of the raw data and analysis will be recorded in a CD Appendix.
4.1.5 The Final Structure of Grounded Theory Process

The construction of the sampling and coding system is the combination of Figures 4, 7 and 8. Figure 4 presents the order of sampling in data library. Figure 7 presents the formation of categories with codes. Figure 8 presents the entire process of Grounded Theory with the data library. In order to have a more comprehensive understanding, it is necessary to develop Figure 8 with more details, combining the concepts of Figure 4, 7, and 8 into a new diagram as Figure 9.

Figure 9 is tailored to this particular project and might not be applicable to other projects. The use of the data library is very creative. In order to use the data library carefully, the data has divided into divisions: Field Notes, Beijing Interviews and Jingdezhen Interviews. The three streams of data are collected in three locations and the nature of the data is very different throughout. Jingdezhen interviews are the dominant data for theoretical coding (as data sampling was already completed intensively in three locations). The Jingdezhen data was also divided into four types of porcelain making. The types of porcelain also indicated the location of data sampling. Reproduction of ancient porcelain will be the focus, as it has the longest history and it is highly relevant to the centre of this research project. The other two are complementing information for better understanding of this traditional culture cluster. The
three sets of data will be coded separately and then the findings mapped by comparing and combining categories from the three divisions. The data will not immediately reach saturation but will be examined and tested by historiography from extant literature. To improve Fernandez’s model, the researcher combined Glaser’s concept indicator model and kept constant comparison in open coding, theoretical coding and selective coding, by comparing indicators and categories.

Figure 9: Modified Model 2 – Grounded Theory Application Design

Keeping memo throughout the entire process of coding and theory generation is important. A memo can be a sentence, a paragraph or a few pages. Glaser stated that the goals of keeping memos were: 1, to raise data to a conceptual level; 2, it develops the properties of each category and defines them operationally; 3, to raise hypotheses about connections between categories and their properties or the properties only; 4, to connect with clusters of other categories to generate theory; and 5, it begins to identify the emerging theory with other relevant potential theories. Memos begin during the joint collection, coding, and analysing of data (Glaser, 1978) and plays a very important role in the formation of theories.
Regarding Chapter 1.3.4 about the use of literature in Grounded Theory, there are three main stages involving literature: before Grounded Theory starts, using background literature in other fields without close relevance; during analysis using literature in relevant fields; and after theory has been generated with field literatures. In Figure 9, extant literature interacts with the three parts in Grounded Theory. Firstly, the use of literature for refining the coding process is not from close and relevant fields, but other fields that might inspire the conceptual analysis in Grounded Theory. Second is with the memos. Memos guide the literature and literature generates memos. However, literature generating memos is at the later phrase of analysis when the theory is being generated. Finally, the literature also contributes in informing and linking substantive theory with other theories in the field.

The actual coding activities are carried out with three interdependent data sets mainly in this order: Jingdezhen interviews, Beijing interviews, and historiography. Due to the uniqueness and differences in approaches, the three sets of data will be analysed separately to form three sets of categories. After the three sets of categories are all saturated, a comparison among the three sets of data will be carried out to gain a more holistic theory.

Although the Beijing interviews are the second set of data coded, the Beijing interviews were conducted before the Jingdezhen interviews. The reason to put it behind the Jingdezhen interviews is due to the nature of the resources in these two places. The Jingdezhen interviews are the target field of exploration. The advantage of doing the Jingdezhen interviews after Beijing interviews is to gain some guidance, but not too much restriction, before entering the field. The purpose of analysing Beijing interviews later is for the same cause. An unexpected 12 month gap occurred between the data collection from the fields, and major data coding; however, this gave the researcher enough time to get away from a perspective strongly influenced by the classics and literature from cluster research, and code the data with a fresh and open mind.

There are 24 interviews conducted in Jingdezhen, five interviews from Beijing, and 11 field notes from both location (one from Beijing and ten sets of notes from Jingdezhen (see Appendix 8.4.3)). The fourth set of data - historiography - has a huge body of literature; thus it will be analysed to reach theoretical saturation as part of the extant literature. However, the theoretical saturation testing will mostly depend on saturation determined by the historiography. The paragraph below is a sample coding of the first interview from Jingdezhen. The logic of coding and memos is presented in Figure 9 above.

**Sample coding**

*Jingdezhen interview 1*

**Indicators**

Shaojiwu (location)

1. 50-60 shops
2. Businesses involved with around 200-300 people
3. 200-300 businesses
4. Businessmen own display stands rather than a shop
5. In one shop, they are not competitors, clear boundaries across different techniques
6. Clear division of labour
7. Craftsmen have their own techniques and relative relation in inheritance

... 
36. Industrial research of Jingdezhen porcelain would be quite helpful, study of its internal network and supporting industries will also be beneficial to the main industry
37. Jingdezhen survives with its porcelain industry and all the other industries are highly dependent on it, such as hospitality, housing, real estate, which drives the local economy
38. Once the core industry prospers, then will the related and supporting industries

Categories

1. Mostly very small SMEs (1.1-1.4)
2. Family business, (1.15)
3. Active cooperation between functional businesses and traders (1.5-1.14,1.20)
4. Unhealthy business environment – cut-throat competition and cheating (1.16-1.19, 1.23,1.25-29)
5. Geographical proximity of production divisions (1.21-22,1.30-31)
6. Local artists with going popularity inside and outside Jingdezhen (1.24)
7. Kitchenware with great potential of profitability and growth (1.32-34)
8. High business confidence (1.35-36)
9. Importance of Jingdezhen porcelain to its entire local economy (1.37-38)

Because the interviews are mostly conducted in Chinese, it is confusing to include the open coding process from Chinese with English indicators. The sample above is how indicators are generated and how categories are generated from them. In order to achieve constant comparison between indicators and categories and among categories, every interview (or a set of data) generates categories in addition to the previous category list. Below is a sample of how new categories are recorded to the previous category list:

Categories

1. Mostly very small family owned SMEs (Developed and joint with Categories 1 and 2)(1.1-1.4, 1.15, 2.1, 2.5, 2.8)
2. Active cooperation between functional businesses and traders (1.5-1.14,1.20, 2.9-10)
3. Clear division of labour (New) (2.11-12 and 2.14-15)

... 
10. Good craftsmen remained in the industry during recession and less impacted (New)(2.17, 2.23)
11. Importance of Jingdezhen porcelain to its entire local economy – Domino effect (1.37-38, 2.24, 2.27)
12. Self-produced and self-selling (New)( 2.6-7)
13. Nepotism (New and joint with categories 2.2-4, 2.20)
14. Wholesalers terminal – Shaojiwu (location) (New) (2.25-26)

After two to three sets of open coding, there will be a new memo generated based on constant comparison and categories and resort categories – combining and rewriting categories to increase its readability and flow of logic. A sample of memo generated after Interview 3 in Jingdezhen is presented below. Please refer to Appendix 8.5 for complete version of sample coding of Jingdezhen interviews, Beijing interviews and field notes with nine sets of data coding, three sets of category lists and three memos.

Coding Memos 1

I. Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)

1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display (Developed, joint with Categories 12 and 20) (1.1-1.4, 1.15, 2.1, 2.5-8, 3.46)
2. Active cooperation between functional businesses and traders (1.5-1.14, 1.20, 2.9-10)
3. Clear division of labour with high level of cooperation between divisions and with traders (Developed, joint with Category 2) (1.5-1.14, 1.20, 2.9-12, 2.14-15)
4. Unhealthy business environment without business norms— cut-throat competition, cheating, plagiarism, copyright issues and corruption (Developed, joint with Category 17) (1.16-1.19, 1.23, 1.25-29, 3.11, 3.13-19, 3.4-6, 3.23, 3.27-28, 3.41)
5. Geographical proximity of production specialisation with nepotism or apprentice (1.21-22, 1.30-31, 2.2-4, 2.20, 2.13, 3.1-2)

After resort:

Categories

1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display (Developed, joint with Categories 12 and 20) (1.1-1.4, 1.15, 2.1, 2.5-8, 3.46)
2. Clear division of labour with high level of cooperation between divisions and with traders (Developed, joint with Category 2) (1.5-1.14, 1.20, 2.9-12, 2.14-15)
3. Unhealthy business environment without business norms— cut-throat competition, cheating, plagiarism, copyright issues and corruption (Developed, joint with Category 17) (1.16-1.19, 1.23, 1.25-29, 3.11, 3.13-19, 3.4-6, 3.23, 3.27-28, 3.41)
4. Geographical proximity of production specialisation with nepotism or apprentice (1.21-22, 1.30-31, 2.2-4, 2.20, 2.13, 3.1-2)
5. Kitchenware with great potential of profitability and growth (1.32-34)
II. Possible relevant field of literature accordingly

1. SMEs
2. Cluster networks
3. Cluster external business environment
4. Geographical proximity with special employment relation – nepotism or apprentice
5. Emerging sectors from traditional industry/cluster

The rest of the memos of Jingdezhen interviews, Beijing interviews and field notes are recorded in Appendices 8.513 to 8.5.21. The coding activities of all data from the data library are finished. Because the size of the Beijing interviews and field notes are relatively smaller comparing to the Jingdezhen interviews, these two sets of data were finished before the Jingdezhen data. It is very hard to examine if the theories achieved saturation with field notes and the Beijing interviews, as they are small and new categories are always generated throughout. However, with the Jingdezhen findings, there are in total 24 interviews with about 32 interviewees (see appendices). Although different interviewees have different approaches, until the end of data coding, there were less and less new categories generated. The nature of the Jingdezhen porcelain research, unlike most Grounded Theory projects and literature, is not in a closed environment or system. It is in an open and dynamic environment, therefore the theoretical saturation would not be limited to generating no new pieces of information generated, but according to the key categories, there are hardly any new categories generated (even this is very hard to achieve in industry and cluster research).

In terms of triangulation and testing theoretical samples, there is a stream of literature from anthropology and sociology about Jingdezhen porcelain production, while business papers about Jingdezhen are rare and not as good quality. The literatures for triangulation includes: firstly, Jingdezhen – Porcelain Capital of China (HUST 2008). This DVD set is produced by Jingdezhen Ceramic Institute, the News Office of Jingdezhen People’s Government, Jingdezhen Radio and TV Station. It is one of the national “Eleven fives” key projects in electronic publication and is authorised material. Secondly is the Tradition and Changes produced by Fang Lili (2000), the most famous anthropologist in Jingdezhen porcelain. Through the examination by HUST (2008), there is no new category generated; however, there is some additional information into current categories: 1. factors for cluster incubation, Changjiang – river for power, raw material – the clay and transportation; 2. 72 steps in porcelain making; 3. Famous artists – offspring of Zhushanbayou – Wang, Xiliang; and 4. Culture – Jingdezhen study formed as a discipline. Tradition and Changes was published in 2000, and although it is a bit out-dated, it is considered a key publication in this field. Some porcelain production locations are not key porcelain production centres, however, it includes an in-depth discussion of Fanjiaping. There was no new category generated and all key findings from the book are updated with findings from this research project. Therefore, the categories are now theoretically saturated.

4.2 Mapping the Key Findings

Before entering Chapter Five for discussing the emergence of theory, it is worthy to try to map the findings as much as possible in a more straightforward way by using diagrams, charts and tables to present the whole picture of Jingdezhen’s porcelain cluster from the key categories. The parts which could not convert into figures or tables will then be compared.
with current research literature.

As the data met theoretical saturation, re-organising the categories of the three data sets to form a sensible theory or theories becomes the first priority. Appendix 8.6 records the resorting of the key findings by combining 64 categories from the Jingdezhen interviews, the Beijing interviews, and field notes guided by Jingdezhen’s key categories and combining this with the other two sets of key categories. Due to the length of new key categories, there are two resorts arranged in order to avoid misclassification as well as to form abstractive theoretical concepts out of the 64 categories. Finally, there are 13 key categories generated from final theoretical resorting presented in Appendix 8.6 as the complete key categories are too big to be included below. It naturally comes up with 13 relevant fields of studies. The discussion in the next chapter will be around these 13 areas; mapping and comparisons between the findings with areas, and literature from the field. The purpose of such discussion is grounded in the theoretical design of Grounded Theory – to make linkage with current research in the field (this issue has been discussed in Chapter One and Chapter Three).

Table 6: Possible Relevant Fields of Literature

1. Important business concepts in Jingdezhen cluster
   a) SMEs
   b) Competitiveness
   c) Entrepreneurship
   d) Financial management
   e) Production management
   f) Industrialisation and upgrading
   g) Innovation
   h) Branding strategies (city image)
2. External business environment
3. Geographical proximity and division of labour
4. Government functions in clustering
5. Cluster internal business network
6. Industry workforce features
7. Buyers marketing network
8. Divisions of markets
9. Directions future development
10. Chinese cluster research and cluster research classics
11. Features of Jingdezhen traditional cluster
12. Traditional culture
13. Cluster incubation and breeding

In total there are nine figures and tables generated from the key Categories 2, 3, 4, 5, 6, 7, 8 and 13. Categories 1, 9, 10, 11, and 12 are more abstract concepts concerning the directions of Jingdezhen’s porcelain industry, features of Chinese cluster research and literature, features of Jingdezhen traditional cultural cluster and traditional culture. These topics could be easily connected with the existing literature without assistance of diagrams and charts. The topics of the nine emerging theories are presented below in Table 7. According to the newly generated substantive theory (with nine figures from key categories), the relevant fields of literature which will be covered in Chapter Five will be presented in Table 8 in order. The
relevant fields of literature with the findings and theories are divided into two main sections: first with the relevant research literature with nine emerging theories (in Table 7); second with the rest of the findings without figures which are explicit facts, ideas and concepts ready for discussion in the field. The topics presented in Table 8 will become the sub-headings in Chapter Five to guide and classify discussions in a logical order.

Table 7: Topics of the Nine Emerging Theories

1. Jingdezhen Porcelain Within Global Economy
2. Transformation of Buyer Behaviours: Roles, Locations, and Sourcing Channels
3. Impact of External Business Environment on the Porcelain Industry
4. Government Intervention vs. Public Expectations
5. Jingdezhen Porcelain Cluster Internal Network – Core and Supporting Industries
6. Porcelain Cluster Population Structure
7. Traditional Divisions in Porcelain Technique Specialisation
8. Contemporary Porcelain Cluster Incubation Timeline
9. Comparison between Local-embedded and Government Planned Markets

Table 8: Relevant Fields of Literature

1. Globalisation Economy and Global Market
2. Buyer Behaviours in Clusters
3. External Business Environment
4. Government Intervention
5. Cluster Internal Network
6. Cluster Population Study
7. Divisions of Market Specialisation
8. Cluster Incubation and Breeding
9. Sustainability and Effectiveness Comparison between Markets
I. Cluster Theories with Competitiveness
II. Chinese Cluster Research and Chinese Traditional Clusters
III. SMEs, Entrepreneurship and Financial and Production and Management
IV. Innovation
V. Brand Management

Source: resort from Table 6
4.3 Chapter Summary

Chapter Four is about theoretical sampling and coding, and is the most important chapter as it describes the efforts and struggles involved in this project. The research design in Chapter Three provides the theoretical map for sampling and coding. According to the nature of qualitative data and its complexity in Jingdezhen’s porcelain industry, Figures 8 and 9 were generated based on Figure 3. There are three sets of data in a new body called “data library”, and historiography data is classified as a stream of extant literature. In a simple Grounded Theory application, a stream of data only needs to reach theoretical saturation in order to be tested, while in this study of Jingdezhen’s porcelain cluster, different research methods built up triangulation and each stream of data is unique in nature and provided information from different angles. Therefore, unlike a typical Grounded Theory application, the saturation examination is held through the historiography. Additional coding and memos can be found in the Appendices. The emergence of theory will be based on the key findings (or emerging categories) and tested by authorised historiography data. Through mapping the key findings, there are nine diagrams and tables illustrating different key areas of Jingdezhen’s porcelain cluster.

The emergence of theory is based on Section 4.3 about mapping the key findings, with nine new figures emerged from a total of 13 key findings. The next chapter contains explanations and an integrative discussion of the emerged theories and conceptual findings with field literature. Its functions are first, to explain the mechanisms of the emerged theories; and second, to discuss and compare the key findings with streams of cluster research in order to spot the contributions and limitations of this research project.
CHAPTER FIVE: THE EMERGENCE OF THEORY AND DISCUSSION

Under the guidance of Chapter Three with thorough exploration and comparison among different Grounded Theory applications, mainly Glaser’s and Strauss’s, Chapter Four presented field work, theoretical sampling, and coding, and produced substantive theory (as expected). The substantive theory contains 13 categories and covers 14 main topics. From these 13 categories, nine figures grounded in data were generated. There were nine topics which corresponded with high relevance to the nine figures, derived mainly from key categories 2-8 and 13 and the supporting data groups. The remaining five conceptual findings from the substantive theory have close linkages with the five fields of study.

The reason for this chapter is to explain the findings, especially the outcome of the nine figures with the findings which show dynamic relationships and divisions. These nine figures are the centre of the key findings and are all about the features of Jingdezhen’s porcelain industry. The discussion of the rules, facts, and mechanisms of these nine figures will be included with current literature in later sections. The five fields of study will include discussion of Jingdezhen’s porcelain cluster. The conceptual findings linked with these five branches of literature and fields will be discussed in Section 5.2.

5.1 Integrative Discussion of the Emerged Figures from Theory with Field Literatures

In order to succinctly present the findings from this project, this section will cover nine topics in a rather condensed manner. Each topic will commence with an overview presented as a figure, followed by an explanatory discussion. The explanatory discussion will be led by the 13 key findings and rooted in field data to present a more holistic picture of Jingdezhen’s porcelain cluster. According to the complexity of the nine key figures, Section 5.1 will only cover the explanatory discussion. The findings will be backed up with brief literature reviews in Section 5.2.
5.1.1 Globalisation of the Economy and the Market

Figure 10: Jingdezhen Porcelain Within Global Economy

This figure presents Jingdezhen’s porcelain cluster within the present globalised economy. From the outside in, there are several layers of relationships in Figure 10. Firstly, the big global market can be divided into a global buyers market and national buyers market. Within the national buyers market, there is the Jingdezhen porcelain market. Secondly, the main groups of buyers internationally and nationally are tourists, porcelain shops, exhibitions, auction houses, antique markets and porcelain collectors. These main groups exist in national markets as well as international markets. Through the development of Jingdezhen’s porcelain industry from 1990s, the market has become more mature. Porcelain businessmen are in every city in China and every country abroad. Therefore, proportions of buyer groups are similar within and out of China. Thirdly, the entire Jingdezhen porcelain market is made up with nine big porcelain markets. They are Porcelaintown, Jingxuchangnan, Fanjiajing, Guomao, Shaojiwu, Lianshebeilu, Xindu, Jinchangli and Laochang. These are the main buyer markets, with very clear divisions of porcelain production and with distinctive functional or technical porcelain types. For example Fanjiajing specialises in reproduction of ancient porcelain and Guomao with appliqué decorative and daily wares. The geographic proximity of a particular porcelain type will increase of the level of competition, which leads to improvement in quality and innovation. Fourthly, different buyer groups aim for different types of markets. The features and characteristics of different porcelain markets make sourcing and purchasing easier for national and international buyers. For example, from Figure 10, porcelain collectors will go to Lianshebeilu as that is the professional market for famous artwork which will increase in value over time. Porcelain shops outside Jingdezhen
might need to cover all divisional markets in order to demonstrate variety for their customers. Fifthly, auction houses and antique markets should actually be excluded from the group list as the Jingdezhen market here is about porcelain production, not about existing antique. Therefore, if the two groups appeared in the list as dominant groups, this is where cheating and bribery occur most frequently and would be harmful to the customers and damaging to Jingdezhen’s porcelain image. It is a very serious issue that should really be taken good care of by policy-maker(s). 

5.1.2 Buyer Behaviours in Clusters

Figure 11: Transformation of Buyer Behaviours: Roles, Locations, and Sourcing Channels

Figure 11 presents the transformation of buyer behaviour in terms of roles, locations and sourcing channels. The researcher was surprised by the interviewees in that most of them received very little education and were poor in literacy. However, they were rich in life experience and maintained very broad and in-depth knowledge about national and international geography and the system of the porcelain industry. From the key categories about the buyer market, there are three sets of loops which differentiate Jingdezhen’s porcelain buyers from buyers in other industries, e.g. construction materials. The first cycle is the role transformation. The logic of transformation by the majority of porcelain stakeholders is: firstly they come from other sectors as villagers, and went to Jingdezhen to stay with relatives and family (Nepotism) for learning crafts techniques. Then when they become skillful, they often go out to start their own businesses by creating their own production, and when they become bigger and make good money, they will aim for more prosperity by selling their porcelain overseas. Finally, they might wind up with a porcelain shop or shops outside.
Jingdezhen. From the interviews, it seems a more common transformation in the buyer market and it also closely links with their status in life with age and life expectation. For example, the age group for exhibition cannot be too young or too old – too young, then you might have enough money to run exhibitions through cooperation; too old, you might desire a more secure and stable life. Therefore, porcelain shops could provide a relatively stable and secure life, with much more profit possible compared to workshop owners. There were people who jump forward and backward among the roles while seeking fortune.

The second loop was on geographical locations. The villagers went to Jingdezhen for porcelain related activities (the local people skip this stage), and when they found better opportunities outside Jingdezhen they will leave, normally to hold national exhibitions around China. They stay in one city for couple of months, up to a year, and then they move onto the next place. When they build up a buyer’s network, they will find holding exhibitions overseas will make good money and they go overseas to South Asia, the USA, and Europe etc. for better profit. The loop of location transformation relates to the margin of profit directly. More experience is required to moving onto the next level of location. The results of continually transferring between locations are: taking the family with kids around – impact is children receiving good education; when they make money, they will build houses back home first – it might be a compensation for unstable working environment and local culture norms; good porcelain dealers manage to buy houses in every city they go; market saturation leads to higher instability and higher mobility; traders cooperate to run a shop or hold a exhibition as the investments are huge.

The final loop is about transformation of sourcing channels. The buyers normally start with existing porcelain markets when they have no internal relationship or very little relationship with the porcelain makers, so they will go to the market for more variety and exploration. Once they get familiar with the market and form business networks with producers in Jingdezhen, they might go to private workshops for two reasons: one is cheaper and stable sourcing; the second is for more unique porcelain ware. Many private workshops get their fame from the outlets, and then disappear from the market in order to protect their unique production and secure the benefits of their customers. When the buyer becomes big enough, they will try to contract with private kilns and buy all production from a particular kiln. By doing this, they could avoid plagiarism and similarity of products in the market. When they grow in size, they will start to source similar types of porcelain from different ceramic production centres to gain broader variety and cheaper but better quality. For example, they might sell a Chaozhou ceramic dining set as Jingdezhen-made to gain more profit. When they become very big and don’t care about the costs, they will start to buy from buyers. Antique markets are for big investors. The loop of sourcing channels transformed along with the ability and capital of individual buyers, which is logical in the market as well. However, it does not necessary mean that who buy from buyers cannot buy from private workshops. When they become bigger in size, they will have more variety of sourcing channels and they can jump around. The features of sourcing channel transformation are: market demand drives,
buyers buy porcelains that meet the demand of their market, they might go in person (nearly every buyer start with going to Jingdezhen by themselves, and when they build their network they make phone call orders.

5.1.3 External Business Environment

Figure 12: Impact of External Business Environment on the Porcelain Industry

The third figure out of the key finding is about impact of the external business environment on the porcelain industry (see Figure 12). Under the external business environment, there are six influential groups which have tight relationship with the industry as external factors. They include: firstly, strong overseas competitors. The porcelain industry in Jingdezhen is relatively small comparing to other porcelain production centres around the world, such as Korea, Japan, Italy, the Netherlands etc. The industrialisation and level of innovation are much more advanced there than Jingdezhen porcelain. However, compared to the impact of national competitors, they have much less impact on Jingdezhen’s porcelain industry due to the demand conditions and taste differences. Strong national competitors includes Chaozhou (and Foshan), Liling and Zibo. These porcelain centres are good at contemporary daily ware and decorative porcelains. Some (such as Foshan) have specialised within architecture ware, such as ceramic tiles. The sizes of these centres are far larger than Jingdezhen; they compete with Jingdezhen in the area of daily wares, decorative porcelain and reproduction. The third group is the local government which is the second most important external factor beside customers. Throughout history, the government played a very important role in the upgrading and development of Jingdezhen porcelain. For example, the prosperity of the porcelain industry in Jingdezhen during the Qing Dynasty was due to an officer named Tang Ying, who was the royal officer in charge of porcelain production during that time. Tang Ying had the
management skills to organise production as well; he was very interested in porcelain production techniques and spent a lot of time studying it. In comparison, the local government failed in many important interventions and the public lost their confidence. Customers as the fourth group represent the market demand of porcelain wares from Jingdezhen. Sophisticated customers are the most direct driver of industry upgrading, the same as how the preference of the royal family will influence porcelain production in terms of style, patterns, transformation and innovation. The fifth group is the opportunity seekers including overseas artists and businessmen. They are the window to Jingdezhen who come and experience the culture and have introduced Jingdezhen ware back to their home country as artists or businessmen. The last group is education and academic support. In Jingdezhen, there is no good university and the ceramic institutes only teach industrial art and porcelain making with no good major taught in porcelain management. The most influential phenomena to the industry recently are: cut-throat competition, plagiarism with copyright issues, corruption, cheating and misrepresenting fake porcelains as antiques, increases in production costs, and the global financial crisis and its effects on capital markets.

Under the impact of the six key groups in the external environment and the pressures of external events and phenomena, the market has several outcomes as the result. First, the market started to reduce costs and keep prices down to compete, dealing with the case of plagiarism and the financial crisis. Secondly, the industry started to upgrade their production by improving the quality of production; thus they could compete with overseas and national competitors and satisfy sophisticated customers. Thirdly, due to the capital economy and increase in production costs, they shrunk in size and hired no one other than family members and relatives. Fourthly, the producers reduced profit by half mainly due to the financial crisis and the demand dropping dramatically. Fifthly, Jingdezhen started to hold an international ceramic fair (expo) every year, with the ceramic fair attracting many opportunity seekers and support from porcelain institutes inside and outside China. Many famous porcelain artists come from around the world to exchange and share knowledge. Sixthly, they developed new ceramic ware beyond reproduction. Famous artists, teachers and students from porcelain institutes became the main force which drives the development of new ceramic or contemporary ceramic ware to satisfy new groups of customers, and to gain competitive advantage they must also avoid cheating and corruption in reproduction. Seventhly, the size of the business population was reduced to 1/3 due to the financial crisis and increase in production costs, and they could barely make a living or a deficit, so many people got out of the business. Finally, they increased innovation activities, in effort to gain competitiveness, avoid plagiarism and survive during the financial crisis.

The impact of government intervention did not seem very active as when the industry experienced an economic downturn, there was no evidence to show any positive government intervention in changing the situation. Although the international ceramic fair is organised by the government, not every sector of porcelain craftsmen can participate and gain benefit out of it other than famous artists.
5.1.4 Government Intervention

Figure 13: Government Intervention vs. Public Expectations

<table>
<thead>
<tr>
<th>Issues</th>
<th>Government actions</th>
<th>Expectations by the public</th>
<th>Met?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relocation of markets</td>
<td>Remove some markets and retain others, fooling the public</td>
<td>• Creditability • Execution • Consistency</td>
<td>No</td>
</tr>
<tr>
<td>City and district planning</td>
<td>Construction design problems found in planned porcelain markets</td>
<td>• Scientific planning • Long-term oriented • Sensible and functional design with integrity</td>
<td>No</td>
</tr>
<tr>
<td>Real estate / rental</td>
<td>Stress on housing, without control over rental price</td>
<td>• Rental price monitoring and paper work regulation • Protect backbone industry</td>
<td>No</td>
</tr>
<tr>
<td>Communication with public</td>
<td>Very little, and only with famous artists</td>
<td>• Take advice from the public as a whole without bias and take actions accordingly</td>
<td>No</td>
</tr>
<tr>
<td>State-owned factories</td>
<td>Dissolution, led by previous Mayor Shu, without taking care of deployed workforce</td>
<td>• Protect the factories • Maintain distinctive features and advantages • Employ scientific management</td>
<td>No</td>
</tr>
<tr>
<td>Copyright</td>
<td>Protect famous artists with good supporting system, without protecting reproductions</td>
<td>• Fairness to every craftsman/artist • Seriousness about faking and bribery – protect city image and the industry</td>
<td>No</td>
</tr>
</tbody>
</table>

In Figure 12, the government seems to not have a positive influence on Jingdezhen’s porcelain industry. Figure 13 above shows a list of key events introduced by the government and comparing government actions according to the events and the reaction and expectation of the public, especially the porcelain practitioners. First, the relocation of markets: since the early 2000s, the government considered the gas kilns in residential areas were very dangerous to residents. Therefore, they announced in local TV channels for a long time saying they would remove many porcelain markets from the town centre, with plans to move them out to the suburbs which were an hour’s drive from the town centre. The porcelain businesses in the traditional markets started to purchase houses and shops in Xindu and Porcelain Town. In the end, the government just moved Shaojiwu and Laochang (still in the process), and could not move Fanjiajing (because the villagers there were tricky). It turns out the government fooled the public with incorrect information. The public expect them to be creditable with execution and consistency. In this issue, the government failed this expectation. The porcelain practitioners then developed a very low confidence with their local government.

Second, when the government planned Xindu and Porcelain Town, it just invited some people (not sure if they were porcelain producers) and designed the towns without thorough planning and consultative modification. Thus, many problems can be found in Xindu and Porcelain Town. In Xindu, the shops are not tall enough for big porcelain making, while in Porcelain Town, there is no place for drying under-glazed wares. The public expected the government to use scientific planning with a long-term orientation, and to create a sensible and functional design with integrity. Due to the poor design, there are very few producers...
running workshops in Xindu and Porcelain Town; it is considered a big waste in terms of space and money.

Third, the government stress on housing resulted in giving land to build luxury apartment in the town centre, close to the traditional porcelain markets. However, they did not plan a good location for their backbone industry; therefore, the rent in the traditional markets increased ten to twenty fold over the past ten years. Addressing this issue, the government held back and did nothing to ease the porcelain producer’s woes. The producers expected the government to monitor rental price with formal paper work for renting and regulations and laws made to avoid exploitation from landlords. The producers also expected the government to think further for its backbone industry in order to upgrade Jingdezhen’s porcelain industry. However, the government did not really recognise the importance of porcelain production as a whole, especially the daily ware and reproduction sectors which employed the majority of porcelain workers.

Fourth, the government had very little communication with the general public. They do communicate with famous artists, and take their advice. However, good advice from the lower level of the public was ignored (which is actually the core of the problem). The general practitioners expected the government to take their advice as a whole without bias and take actions accordingly. However, once again the government failed their expectations.

Fifth, the government, led by Mayor Shu, dissolved the state-owned factories in the early 2000s without any compensation for the displaced workforce. The ten state-owned factories was the icon of Jingdezhen which specialised in different area of porcelain making. The public expected the government to protect the factories as once the factories closed down, they could not function as large production unit, and could not maintain distinctive features and advantages. A better solution beside dissolution is to employ scientific management strategies and revive the factories. However, the government seemed not particularly interested in porcelain at that time.

Finally, copyright problems remain the biggest issue in Jingdezhen. The government was able to protect the famous artists with good supporting and grading system; however, they paid little attention to the reproduction sector. The public expected the government would treat all craftsmen and their divisions fairly. The government as an overseer of the city should take care of this issue seriously and try hard to eliminate faking and bribery in order to protect the city’s image and the industry. In all the six listed issues from Figure 13, the government failed in its role to the industry for all significant issues and events. Failure of government intervention is one of the biggest issues stopping the whole industry from upgrading, as the internal and external market lack government regulation and control. If the government continues to fail the public, the relationship between the two will cause big problems to the city and its industry. The development of faking porcelain is one of these signs.
5.1.5 Cluster Internal Network

Figure 14: Jingdezhen Porcelain Cluster Internal Network – Core and Supporting Industries

Figure 14 is relatively straight-forward. Porcelain as the only backbone industry of Jingdezhen has a group of key supporting industries. Due to the distribution of population, the porcelain-related population occupies over 50% of Jingdezhen’s total population. This is very unique around the world. The supporting industries include: white clays, drawing and carving supplies, chemicals (glazes and colouring), kilns and firing, wrapping and boxes, porcelain transportation, hospitalities and other. The supporting industries depend on porcelain production. When the economy is booming, they benefit from the prosperity of porcelain production; in an economy downturn, they are influenced by reduction in demand. Not only is it the supporting industries, but all sorts of businesses who serve people from the industry are affected. There are some network features of the porcelain industry with their supporting industries. First of all, a free market; in ancient times, all industries in Jingdezhen were controlled by different clans and regional labour unions. However, this phenomenon has been reduced to minimum. The majority of producers are concerned more about quality and price trade-off. There is more competition and less guanxi; quality leads demand. The relationship of porcelain as a core industry with supporting industries is like the domino effect. Once the porcelain reacts to change, all the relevant and supporting industries will be impacted after it. They are inter-dependent with the porcelain industry; therefore, they are inter-dependent on each other.
5.1.6 Cluster Population Study

Figure 15: Porcelain Cluster Population Structure

Figure 15 is about the porcelain cluster population structure. As mentioned in the previous section, about 50% of the total Jingdezhen population is in porcelain-related industries. According to the diagram above (Figure 15), the total population size is represented by the biggest box and the porcelain related industries are in circles. The overall population characteristics are: 50% of the total Jingdezhen population has Fuzhou origin. Fuzhou is a village close to Jingdezhen and Fuzhou people move to Jingdezhen for porcelain production, with a history stretching over hundreds of years. The 50% of Fuzhou origin in Jingdezhen entered every sector of business, including fruit selling, construction, clothing, etc. Within the porcelain industry, the population has a very high level of mobility and instability; they are more like fortune seekers and do not stay in one position for long time as presented in Figure 11, especially as the salaries for craftsmen are very low and the labour contracts are mostly part-time. For period of time, craftsmen might be fighting to survive and seek opportunities wherever to make good money.

There are six major subpopulations in Jingdezhen’s porcelain industry: Villagers, low educated, young adults, unemployed, redeployed, and college graduates. The villagers are the biggest group among them. Villagers seeking development in cities are not limited to Jingdezhen, but all around China. They rent out farmland and work in Jingdezhen to avoid taking over the farmland by the government as a regulation. They might settle down in Jingdezhen, or at the end go back for farming – this depends on market conditions and demand for porcelain production. The second largest group is low educated. They are as big as the villagers, but cause problems in the industry. Most of them have a lack of sensitivity
for public image by playing cards at work and talking very loudly in all occasion. They are the group which damages the porcelain image and Jingdezhen city’s image outside of Jingdezhen, especially in overseas exhibition markets. The villagers have mostly a low level of education, constituting the unemployed and redeployed from state-owned factories (in groups of nearly the same size). College graduates from ceramic institutes in Jingdezhen and around China are the more successful craftsmen and business owners. Only a small part of this population has been redeployed from factories. Many of them become well-known artists. The young adults are mainly junior high school graduates and some even do not finish junior high school. They will have been arranged by parents or relatives to go to Jingdezhen for porcelain making. Normally they go to workshops run by relatives, family or friends. The young adults are from villages or local people.

5.1.7 Divisions of Market Specialisation

Figure 16: Traditional Divisions in Porcelain Technique Specialisations

Figure 16 presents the traditional divisions in porcelain technique specialisations. There are two groups of specialists. One is the state-owned factories (1950s to 2000s) and the other is local specialists (formed over hundreds years ago and transformed over time). The specialisations of the ten state-owned factories are retained by redeployed craftsmen from factories and have become streams of production characteristic of Jingdezhen porcelain arts. The list includes: Jianguo factory with high temperature colour glaze; arts factory (Yishu) with famille rose; Renmin with blue-and-white ware; Hongguang with ling lung. These four types form the most famous characteristic types of Jingdezhen porcelain today. The list also includes: Guangming with blue-and-white ling lung by combining the technique of blue-and-white with ling lung technique, mostly applied to kitchen ware now; Hongqi factory with
under-glazed; Hongxing, Yuzhou and Jingxing factories with daily ware and finally Dongfeng with pots. During the planned economy, there was a lack of management strategies to organise production and manage people. For a very long period of time, no matter how much work you had done and achieved, all workers are treated as no different which decreased their productivity and finally all ten factories were closed down with significant deficits.

The second section is about private producers by location. People from Duchang specialise in over-glazed famille rose and patterns. Boyang specialises in carving and figures. Jingdezhen locals specialise in over-glazed famille rose and blue-and-white ware. Leping is famous for flowers and birds while Fuzhou is good at blue-and-white and Korean style. Most craftsmen could name the features of each regional group as even now they still pass on their techniques to relatives, families and people from the same village, town or city. Therefore, the patterns in divisions of porcelain technique are relatively stable with slight increases or decreases in a particular workforce. The groups in the lists are the five biggest groups in porcelain production. It is not a complete list. Moreover, their specialisations are not limited as presented in the specialisation list, but the key categories of specialisation are highlighted according to the groups.

5.1.8 Cluster Incubation and Breeding

Figure 17: Contemporary Porcelain Cluster Incubation Timeline

<table>
<thead>
<tr>
<th>Starting Time</th>
<th>Movements/Events</th>
<th>Effects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early 1900s</td>
<td>Modernisation</td>
<td>Depress traditions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Out-reach to the world</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Decrease handcrafting</td>
</tr>
<tr>
<td>1949</td>
<td>Industrialisation</td>
<td>Form state-owned factories</td>
</tr>
<tr>
<td></td>
<td>People's Republic of China</td>
<td>Depress handcrafting further</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Planned economy</td>
</tr>
<tr>
<td>Early 1990s</td>
<td>2nd modernisation</td>
<td>Treasure traditions</td>
</tr>
<tr>
<td></td>
<td>Capitalist modernisation</td>
<td>Protect inheritance and heirs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Retain and increase hand crafted production</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Collapse of state-owned factories</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Machine-made devalued</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Market economy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Free competition</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SMEs occupied 98% of total porcelain businesses</td>
</tr>
</tbody>
</table>

Figure 17 presents the timeline of Jingdezhen’s contemporary porcelain cluster. There are three phrases that are important to cluster incubation with key movement in thoughts, politics and economics. From the chart above, in early 1900s, there is the modernisation movement.
During this time, China was just released from Qing dynasty and had the opportunity to learn about the world since it had very little connection with the outside world due to the closed door policy by the Qing Empire. People were interested in everything from overseas and considered them all good and advanced. Therefore, the new government and the intellectuals depressed the value of Chinese traditions and brought new thoughts and technologies from abroad, as well as sending a considerable group of people overseas to get education. They valued machine and machine-made goods, while depressing and decreasing handcrafting. In 1949, there was a big political transformation in China by the formation of the People’s Republic of China. China started its first formal industrialisation since 1949. They established state-owned factories in Jingdezhen, bought production plants from overseas, depressed handcrafting further by remaining a very tiny group of potters to produce reproduction and traditional porcelain to gain foreign currencies. During 1949 and 1980s, China was under a planned economy based on the practices of Russia and guidance from Communism.

Since the early 1990s, there have been the 2nd modernisation and capitalist modernisation. China turned away from a planned economy towards a market economy with free competition. The effect of the 2nd modernisation lasts until now. Since the early 1990s, people have started to realise the importance of national identity and recognised the treasure in traditions. There was a huge group of academics sent by the government to protect inheritance and heirs. The demand from abroad and within China for handcrafts increased dramatically. Jingdezhen retained and increased hand crafted production in self-driven private sectors, since at that time the state-owned factories were suffering from significant deficits with only the Arts factory barely sustained in that time period. Finally in late 1990s, most state-owned factories stopped production and started dissolution. The state-owned factories represented the machine-made porcelain production, as before the factories there were no machine production plants in Jingdezhen. Therefore, along with the collapse of state-owned factories, machine-made ceramic devalued. Today, 98% of total porcelain businesses are SMEs, and the remaining 2% are big businesses who are also private-owned, not state-owned.
5.1.9 Sustainability and Effectiveness Comparison between Markets

Figure 18: Comparison between Local-embedded and Government Planned Markets

Figure 18 is the last figure among the nine, but not the least. It compares local embedded markets and government planned markets in Jingdezhen. There are three markets representing local embedded markets: Fanjiajing, Guomao, and Jinchangli; while another three are planned: Xindu, Jinxiuchangnan, and Porcelain Town. The two groups are evaluated in a list of measurements developed from cluster researchers from Beijing as well as interviewees in Jingdezhen. The measurements measure the favourable factors of successful clusters which have sustainability marked by yes or no. The list includes historical opportunities, geographic proximity, international business activities, local entrepreneurship, less government intervention, globalisation, convenience in transportation and goods location. On the left-hand side, all favourable factors are achieved, and on the right-hand side for the planned markets, the measurements are totally not satisfied except one which is hard to make a decision.

According to Figure 17, during the 1990s private SMEs started to produce handcrafts without government support. Fanjiajing became the first handcrafts market in Jingdezhen naturally as it is close to railways and bus stations. Then as more people came to run hotels and restaurants and potters came to get jobs, businessmen came to reach the buyers. Therefore, it had a historical opportunity to emerge; while the planned markets do not have such historical opportunities as they are too far away from the town centre and are very inconvenient for transportation. The government rearranged tourist buses to stop at Xindu after they planned Xindu market; however, people still like to go to the town centre for more choices and better prices. Regarding the geographic proximity, state-owned factories which later rented out to
private workshops are all close to Fanjiajing, even though Fanjiajing was originally only porcelain workshops. As it is close to the production sites and formed a close geographical business network, it has geographic proximity. In comparison, the planned markets are far from all the supporting industries, workshops and customers. Regarding international business activities, government planned exhibitions and cultural events are held in Jinxiuchangnan and Porcelain Town to attract buyers; however, excluding the big events, very few people go shopping in Jinxiuchangnan. At an opposite, Fanjiajing passively waits for the buyers to come, no matter whether national or international buyers. There are no planned international events or business activities, yet many foreign traders purchase from Fanjiajing, Guomao and Jinchangli. As presented in previous figures, 98% in this industry are SMEs which shows a very high degree of local entrepreneurship. Fanjiajing is where many of them started from. However, most of the businesses in Xindu and Porcelain Town are producers that moved from Fanjiajing, Shaojiwu, Laochang, not new entrepreneurs. It is clear that the level of government intervention in planned markets is high, and local-embedded markets receive a low level of intervention or negative intervention. Globalisation can be observed by the colour of people in the markets: in Jinchangli, there are many foreign buyers and tourists for contemporary porcelain, while there are not many foreign buyers in the planned markets. Convenience in transportation and good locations are covered above.

5.2 Integrative Discussion of the Conceptual Findings with Field Literatures

This section will include a brief literature review of key underlying theories and research from the field(s) that compares the existing bodies of knowledge and the findings from this research project, which will be used to identify the limitations and contributions of each particular key category (or finding).

5.2.1 Cluster Theories with Competitiveness

Clusters have a long history of being part of the economic landscape, with geographic concentrations of trades and companies in particular industries dating back for centuries (Porter, 2000). This literature review will not cover the whole evolutionary process, but some key classics and pioneers in the field. Cluster research can trace back to Adam Smith (Chen, 2007a). Smith raises the issue of division of labour through observation (Smith, 1776). He says ‘The greatest improvements in the productive powers of labour, and the greater part of the skill, dexterity, and judgment with which it is anywhere directed, or applied, seem to have been the effects of the division of labour’. Division of Labour is an essential characteristic of firms in clusters; it is also a very important finding from the field data from Jingdezhen. It indicates the relationship between firms in clusters, as every firm has different functions within clusters. From the late 1800s to early 1900s, there was Alfred Marshall and Alfred Weber. Marshall considered culture, climate and custom should be considered as drivers or factors when studying organisations, and these three drivers are the key features of Jingdezhen’s traditional cultural cluster. Marshall also states that the local atmosphere characterises industrial districts (Marshall cited by Aspers, 1999). Marshall did not expand
‘atmosphere’ into more detail; for example, innovation (Chen, 2007a). He might consider factors work efficiently only with other components. Marshall is one of the earliest to study the emerging and dynamic industrial districts. Alfred Weber had a historical analysis education background. He maintained a commitment to the “philosophy of history” traditions (Fearon, n.d.). His theory of the location of industries is the foundation of Economic Geography. The theory is mainly about the minimising transportation costs and labour requires analysis. His theory about agglomeration was also covered by Marshall (Krugman, 1990). Agglomeration is an economical phenomenon in the early development stage of clusters. In Jingdezhen, agglomeration of contemporary porcelain clusters started from the end of 1980s and early 1990s and it naturally formed the markets and attracted demand from inside and out of China. Agglomeration has been covered by a lot of Chinese cluster researchers such as, Wu (2006), Chen (2005) and An (2006). Beside Weber, Hoover is another key economist who contributes in industrial location theory (1937 cited by Bergman & Feser, 1999). He discussed the differences between urbanisation and localisation economies in location of industries theory. In the case of Jingdezhen porcelain, the key porcelain markets formed the new town centre which differs from ancient town centre. The industry is also local-embedded with a history of over 2200 years.

Under the world economy, forming new theories becomes extremely popular among scholars. However, Krugman went back to neoclassic economics. He (1990) states that ‘many issues that are currently framed as issues of international trade should instead be viewed as issues of regional economics and economic geography’. Based on the theories of Marshall and Weber, Krugman developed a two-region, two-sector general equilibrium model of location involving transportation costs; whereas, transportation costs are often ignored in classic economic models. Under his model, when transportation costs are high and economic scale is weak, manufacturers may choose to produce close to the market; when transportation costs are low and economic scale is strong, manufacturers will have initiatives to concentrate in one region. The model is neat and simple. Convenience of transportation was mentioned several times by interviewees from Jingdezhen; they stressed this factor as a key component for breeding Fanjiajing’s reproduction market which led to success.

Michael Porter is another key contributor to both cluster theories as well as the concept of competitive advantage. He did not begin his career with competitive advantage, but came to this topic reluctantly (1990b). The idea of the competitiveness of nations was sparked from the debate about what is competitiveness (Porter, 1990b). At that time, a standard definition of competitiveness was not available; moreover, there was no accepted theory to explain it. That is why Porter started to explore the competitive advantage of nations and established this theory. The core of the CAN theory is the principles of competitive strategy in individual industries. In 1998, under the influence of neoclassical economics, he added the location of competition, socioeconomics of clusters, and clusters and economic geography. At the same time, Porter also expanded his study targets from only developed countries to developing countries. This may be due to the significant development of third world countries
experienced during the 1990s. By 1998, Porter published the book ‘Clusters and the New Economics of Competition’ (Porter, 1998a). He systematically introduced the New Economics of Competition theory and enhanced the cluster theory from 1990. In Clusters and the New Economics of Competition, Porter explained what a cluster is (Porter, 1998a/b). Shortly afterwards, Porter’s cluster theory became the principle theory for local cluster initiatives in many countries, regions and cities (Chen, 2006 & Porter, 2000). He then combined new and old perspectives in clusters and published ‘Location, Competition, and Economic Development: Local Clusters in a Global Economy’ (2000). He comments that cluster’s advantages lie outside companies and even outside their industries, residing instead in the locations at which their business units are based. Governments should not attempt to create entirely new clusters, but reinforce and build on established and emerging clusters. That applies to Jingdezhen’s porcelain, which is not a new cluster but a cluster with a long history of prosperity. Because clusters has their complexity (Chen, 2005), it is impossible that one researcher could manage every aspects on clusters; it is the same to Porter. Some areas that Porter did not cover or did not expand on include: first, other contemporary researchers’ contribution in the field, such as innovation; second, historical development patterns of traditional clusters; third, other researchers’ contribution from different cultural backgrounds; and fourth, business communication and relationships in different cultural situations. In the findings of Jingdezhen porcelain, the way to gain competitiveness in the market is by improving the quality of production and innovation in production procedures and porcelain making techniques.

5.2.2 Chinese Cluster Research and Chinese Traditional Clusters

Chinese cluster research started from the 1990s. During the last twenty years, they have made some achievements in this field. First of all, the number of academies specialising in cluster research has increased (Gu, 2003). Information exchange and sharing on cluster development between Chinese government and other governments has increased. A number of organisations for cluster research have formed throughout China. Since 2003, some cluster research projects were launched by the Chinese government based on theory application in China. For example, one is about “Geography Economics Theory of New Clusters and Empirical Research in China”. The project coordinator is Wang Jici, a professor from Peking University. She has already published more than 100 academic articles on clusters domestically and overseas. The project includes researchers from Economics, Sociology, Management and International business. Most of the current Chinese cluster research is based on topics from this project. Governments play an extremely important role in promoting cluster research and education (An, 2006). The problems with current Chinese cluster research is: first, most of the Chinese cluster literature reviewed is just theory application, rather than theory confirmation or exploring new areas in cluster research. The applied theories and methodology are quite similar from one to another. Second, a lot of cases used are high-tech or new science industries; traditional Chinese clusters like arts, food and
handcrafts have not gained much attention. Third, the strategies for clustering are quite similar and generic due to narrow sampling areas (Gu, 2007).

The framework of cluster theory by Porter is more about how to organise a successful industrial cluster, rather than finding out how a successful industry complex or regional economy emerges (Motoyama, 2008). Motoyama argues that in order to find a solution, to achieve development lies with historical analysis according to unique indigenous capacity. Only then do we have the ability to distinguish between which part of its development was accidental and what could be applicable to other regions. Roveda and Vecchiato (Roveda and Vecchiato, 2008) stated that the district stakeholders share the path of evolution; therefore, building scenarios could help them align their strategies with action plans. It could also be the same case that clusters in a region share the path of evolution because of its inter-relationship. Clusters of the same type under a similar regional milieu share a similar pattern of development. There are many researchers pursuing in-depth, historical studies and analysing them, but most of the historical analysis of clusters is within the three decades (Feldman and Francis, 2004, Hallencreutz and Lundequist, 2003, Li, 2005).

China has many featured traditional industries along her 5000-year history, such as silk in Suzhou and porcelain in Jingdezhen. Since the Qing dynasty, China tried hard to adopt Western social and economical systems; however, with a strong cultural background, the practices in China have huge difficulties unless they adjust the system to Chinese style. Currently, the majority of Chinese cluster research is based on Porter’s CAN diamond analysis system, for example Wu (2006), Zhu (2006, p.57) and most authors who publish in the Industrial Clusters in China magazine (2005-2007). Moreover, many of the clusters that have been studied are those initiated by the government after 1979. Because all these industries are quite young, agglomeration at the early cluster development stage has become one of the most popular topics. Beside new clusters, organic traditional clusters are also covered. They are those that were born naturally and have a long history of development. However, the research focus is their later development after 1949 (Zhu, 2006, Liu, 2005).

Many organic traditional clusters used to be industry pioneers. They contain enormous treasures in business spirit, culture and practices (Wu, 2006). Local entrepreneurs in these clusters take the business spirit for granted; researchers considered it regional secrets owned by businessmen in particular regions. Sophisticated research on traditional clusters is needed, in order to discover this regional business spirit from history and develop assessments to evaluate business practices in China. That is the purpose of conducting Jingdezhen’s porcelain cluster research and employing Grounded Theory at the same time, as there is not much guidance for traditional culture cluster research. Another reason is to expect to gain a more holistic picture from the raw data.
SMEs, Entrepreneurship, and Financial and Production and Management

SMEs are the key elements in the development of national economies in developed countries (Dordević et al., 2010). The research field of SMEs has been emerging over the course of several decades; today, it refers to small and medium-size enterprises. The research on SMEs was firstly considered to be strategic, and then more recent research distinguished SME business activities from MNEs, whereas in the 1980s to 1990s there was a focus on MNEs; the big multinational firms. How big is an SME? Different countries and different researchers presented many scales without standardisation. The reason behind this might be the feature and structure of each national economy. For example, it is inappropriate to use the same scale for China and New Zealand (NZ) as every medium size city in China has a greater population than the total of NZ. Therefore, differences should be included. In Ireland, the SMEs are businesses that have less than 250 employees, the same in the UK. In Australia, the bar is downgraded to less than 100 employees. Depending on different approaches in SMEs research, researchers got different figures over size. As the discussion of SMEs in terms of size with business performance and effectiveness of strategic application varies, the topic was not yet mature enough to form any standard (Cunningham and Rowley, 2010). In Asian countries, there is a table developed by Cunning and Rowley (2010) presenting the definition of SMEs in different countries and districts in terms of sector category and criteria/official definition.
By reviewing Table 9 above, the sector category and criteria in Asia SMEs research is very different from each other. The outcomes of research in Malaysia might be unsuitable for Japan, because the definitions of SMEs in sectors and criteria are very different. Moreover, the business condition of Japan has a better foundation when compared to Malaysia, and Japan is a developed nation while Malaysia is still at the developing stage. The lessons learned in Malaysia might not be applicable in Japan. SMEs and local entrepreneurship are a combination in research. Local entrepreneurship in different countries has some guiding principles which are the same across countries; however, the governing culture, tradition and customs seasoned local entrepreneurship with its own special characteristics across nations, even cities and towns. Therefore, the characteristics and features of Jingdezhen SMEs and local entrepreneurship should be similar as well as different to the rest in the world.

In Jingdezhen, there are mostly small, family owned workshops or outlets selling their own production, just like every shop will have a production line. They hire stands rather than a whole shop for displaying goods, due to high rental prices and need to stay in the market. There are many husband and wife shops which could be considered as a post-modernism phenomenon; however, it is actually marked by high production costs and insufficient capital to employ people, and tends to stay very low profit. As the majority of producers are
relatively small in size, their productions are in handcrafting and casting. However, there are some big producers who manage to run a production chain in handcrafting while a group of potters specialised in one procedure only also have their own kilns. Most of the outlet owners started from craftsmanship.

The spirit within entrepreneurship includes innovation, challenges and diligence, business management skills (inventory, price management etc.) and business philosophy. The local entrepreneurs are drivers of cluster formation – it aligns with discussion of favourable factors of successful clusters from Section 5.1.9. In SMEs articles (Cunningham and Rowley, 2010), they indicate that difficulty in financial support is one of the key challenges faced by SMEs. This aligns with the situation in Jingdezhen. The study on management systems and HRM practices are also two focuses by recent researchers that could meet the need of SMEs in Jingdezhen ( Đorđević et al., 2010, Cunningham and Rowley, 2010). The research on continuous innovation and performance management of SMEs in clusters that helps to foster cooperation will be a potential area of research to the SMEs in Jingdezhen (Carpinetti, 2007).

5.2.4 Innovation

A nation’s competitiveness depends on its capacity of industrial innovation and upgrading (Porter, 1990, p.73). Porter (1990) states that “much innovation is mundane and incremental, depending more on accumulation of small insights and advances than on a single, major technological breakthrough”. However, breakthroughs are inevitable during the innovation progress. Ketels (2004) states that in modern competition, innovation occurs in non-sequential interactions of different companies, universities and research institutions. The question here is how about within old competition? Innovation is one essence in the “local atmosphere” of clusters. It ties with productivity and value-added production.

Wang (2005) states there are three situations that China is undertaking at the moment: First, improvement of education and life standard. There is a pool of demand for innovative products. Second, innovation is a necessity for upgrading local industries. Third, big cities are losing competitive advantage in the manufacturing sectors; they need to innovate. Innovation has been an important research area in the Western world since the 1990s (Chen, 2007b). There are enormous research contributions in the field. Chen (2006, 2007a/b) discussed international and domestic innovation research in China. His research provides theoretical support to innovation studies in China. Although the research on innovation starts in Western countries, it does not mean that only Westerners have the spirit of innovation. Most distinctive ancient inventions are actually from the East: Greece, India and China.

5.2.5 Brand Management

Successful branding adds value to the product, such as Coca Cola, which has occupied the top position of the world’s top 500 brands ranking for many years. Brands are a by-product of core products or services, and have their own value that the public would like to pay more for
the brand. Luxury brands such as LV, Gucci in the fashion industry – their value is not on raw material, but tastes and status created through their branding strategies by sustaining high levels of awareness and tightly controlled brand diffusion in order to enhance exclusivity (Phau and Prendergast, 2000). Luxury is a main factor in differentiating a brand from the rest in a product category which achieved distinction in quality (Vigneron and Johnson, 2004). The porcelain industry in the traditional culture sector is where luxury brand strategies should be applicable. Similar to limited editions of every dress from the world’s famous luxury brands, handcrafting cannot be repeated. Jingdezhen gained its fame since the Yuan Dynasty. In a contemporary cluster, the industry increases its reputation through porcelain shops and outlets in other cities and other countries. A good national and international city image becomes very important to secure market demand. However, currently the Jingdezhen porcelain city brand has been damaged by cruel price competition in the retail market, cheating, and plagiarism. Therefore, the branding that SMEs and the cluster should focus on is to create more quality brands out of the industry, to gather the best resources together to protect the porcelain image of Jingdezhen, and more importantly, to differentiate good quality porcelain from the rest.

Franz is internationally-recognised porcelain brand in Jingdezhen; it used contemporary management and marketing strategies in their business planning. Moreover, their brand strategy was very successful. Franz has a history of less than ten years but is now operating outlets in 6000 sites in the world (Wu, 2009). The unique difference from Jingdezhen porcelain practitioners and Franz is Franz has its background in manufacturing and trading giftware since 1969 (not in the porcelain industry), where they built up their strength in international marketing skills though trading with overseas buyers. In 1991, they became the world’s No.1 artwork manufacturer. During this time in artworks, beside Porcelain, Franz’s team understood the market in different countries and was very familiar with different porcelain shapes in Western countries. They spent a decent amount of time developing their brand and technology. It took about eight years for Franz to move from concept to mass production in Jingdezhen in 2005. The brand nurturing process requires passion and good management in terms of financial capital, production and technology, human resources and time. It sets a good example for the rest of the porcelain branches in Jingdezhen, with the hope that they could reach what Franz had achieved through consistency in branding.

5.3 Chapter Summary

This chapter covers the explanation of the nine figures of the key findings and relevant streams of literature at the same time. Through constant comparison between the key concepts of classic cluster research literature, from Adam Smith to the most recent Michael Porter, findings from this project are discussed. First of all, all the theories from literature match with the findings from Jingdezhen well; there is no single theory that goes against the
reality observed in Jingdezhen. Furthermore, the emerged theory from Grounded Theory is much broader in size and more in-depth and close-related to the situation in Jingdezhen.

The next chapter will be a reflection of the researcher by recalling the entire process of conducting this project, in order to identify value and contributions, limitations of this research, and the future research potential.
CHAPTER SIX: CONCLUSION

This chapter will mainly discuss the value and contribution of the research achieved by identifying the innovative methodological design and application, as well the key contribution of the emerged theory. Second, limitations in terms of research design, field work, coding and memos as well as mapping will be developed for future development. According to the exploratory nature of Grounded Theory and intention of this research project, a more focused narrow area of research could be derived from this project. The following sections have more details.

6.1 Value and Contribution of the Research

The value and contribution of this research can be divided into two areas: methodology and findings. In terms of methodology, this project has managed to make several contributions. First, there is no cluster research conducted using Grounded Theory. The researcher started researching clusters since 2007, and many research gaps were found, especially in research on traditional culture clusters. Through academic databases, there is no particular research in this area; therefore, the researcher started to plan by combining Grounded Theory with traditional clusters. Since there is no existing traditional cluster research theory or model to follow, the research naturally become explorative in nature. Grounded Theory was considered to be the most rigorous method in qualitative research and became a priority. However, merging Grounded Theory with cluster research is difficult. Glaser’s and Strauss’s research targets, as well as some applications in the information technology field were much more focused in a semi-closed to closed system most of the time, e.g. a hospital. Clusters are an open system and each of them has very specific and complicated networks and construction. All Grounded Theorists agreed that Grounded Theory is a very time and energy consuming. Some of them adapt to electronic coding and some contend that coding by researchers is the better way to get quality key categories. It is difficult to manage even in a closed-system; therefore, merging Grounded Theory with cluster research is a breakthrough.

Second, there are four main data collection methods used together with Grounded Theory. They were: interviewing, observations, field notes, and historiography. Normally, Grounded Theory goes with one data collection method. The researcher combined a group of research methods for the purpose of gaining as rich as possible raw data from all channels that are available. Lehmann (2001) and Fernandez (2004)’s model is then modified to include a data library (see Figure 9), which contains interviews and field notes, and put historiography in the extant literature due to its body. There are two streams of interviews; one stream from Beijing, and another from the field. The first stream of interviews was from cluster researchers in Beijing to get an idea about what had been achieved by Chinese researchers, to check if traditional clusters had been studied and the value of conducting this type of research. From all five interviews, the interviewees gave a very good and supportive feedback, expectations
of what would be the outcome of such research, and provided many possible research potential and directions. Through reconfirmation of the value of this project and the reality of current Chinese cluster research, the researcher went into the field with confidence in the following month in 2008. There are many forms of historiography taken from the field, including audio, photography, PowerPoint slides, government documents, books, journal articles, news articles etc. The data gained from triangulation using the research methods does complement each other for a more comprehensive presentation of this porcelain cluster.

The value of findings is also included in Chapter Five along with discussions of field literature. First, there is no conflict between the findings from classical theories found in Sociology, Economics, and Management fields. The reality in Jingdezhen includes the key contributions of all pillars in cluster research, including Marshall, Krugman and Porter, from raw data and emerged categories along the coding procedure. It indicated that this research was of good quality. The quality was not “made up” by the researcher, but rooted in data. It is actually very hard to meet every single theory in this research field history, unless it is a very successful cluster and with very thorough data collection and analysis. Another key contribution is beyond theory confirmation; there are some key findings and areas worthy of exploration. The nine figures from the substantive theory are very rich and each one could become independent research topics. SMEs and branding, which are the most popular research topics, are the key areas identified by low educated craftsmen and businessmen. Therefore, the research of cluster SMEs and cluster branding should be at the centre of traditional clusters such as Jingdezhen’s porcelain cluster.

6.2 Limitations

As mentioned in Section 6.1, this research project was actually larger than expected. Therefore, there are many things that could be done better next time. In terms of research methods, the number of research methods could be reduced, to focus on one or two in addition to analytical methods such as Grounded Theory. This will make the project more manageable.

In terms of the field work, this project only dealt with part of the raw data, not all of the data. As a guiding rule of Grounded Theory, when data met saturation, then there is no need of further coding. In the researcher’s situation, as the field was very far away from the university, it was impossible to return many times for more information, and there was only one month for data collection (although 32 interviewees participated). Therefore, one regret is not being able to use all the data. Therefore, a case study might also be suitable. However, in terms of the size of data, it needs as long as a PhD degree to finish.

Due to the limitation of a Master’s thesis in length, the nine key figures out of the theory were not explored as much as expected. The figures could be discussed later in journal articles to explore possible further contribution with support from literature.
6.3 Further Research Possibilities

On January 28th 2011, the researcher met with a porcelain trader from Jingdezhen who was the biggest porcelain dealer in Xiamen. His collection of porcelain sales was very rich with the highest porcelain artwork selling for 2 million RMB; moreover, he was an investor of a porcelain workshop in Jingdezhen and goes back nearly every month for business. When the findings of this research project were shared, he pointed out two areas of particular need. Firstly was branding. It is not about branding of the city, but branding strategies applied to each division of porcelain specialisation to form their own brand and market this brand. Secondly, there was a need for knowledge management to sort the porcelain knowledge of Jingdezhen along a historical horizon, considering types of technology and patterns of each period of time. It is a huge project and one not possible to be conducted by any individual. The size of work is enormous, for example, from 1949 to 1990, there were over 6000 patterns produced by the Art factory alone. However, if the knowledge library was built up, it will benefit Jingdezhen as a whole to upgrade their entire porcelain production structure by retaining their traditions and techniques. The patterns in history could be used by all SMEs for over a hundred years without repetitiveness – that is the size.

Since this project is a big project, cooperation with researchers in China will be beneficial, especially cooperation with porcelain industry researchers who understand the industry. Once the model in Jingdezhen succeeds, it will then be able to set an example for other traditional cultural clusters in and out of China. Action research will be the next aim of this researcher by actually practicing the theories in the field, and it could form a research unit in Jingdezhen for cluster upgrading and providing training and counselling services for their practitioners.
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7.1 Appendix I: Research Proposal

Research Proposal for Master of Commerce
Department of Management
University of Otago

Title: Exploration of Cluster Attributes in Traditional Cultural Clusters in China: The Case of the Jingdezhen Porcelain Cluster

By: Yuting (Jane) Zhuang

Porter (1990) wrote that “national prosperity is created, not inherited”. The most effective way to build and maintain the competitive advantages of a nation or region is through innovation and upgrading in clusters. In the past twenty years, most cluster research focused on the development of traditional clusters after the Second World War, or new clusters initiated after the war (Audretsch & Feldman, 1996; Bergman & Feser, 1999; Chen, 2006; Wang & Tong, 2001). Although some traditional clusters have been referred to (Porter, 1990; Liu, 2005), there is a lack of analysis of the key factors of successful traditional clusters regarding their critical differentiator, namely their cultural and historical backgrounds. In the most significant research into business culture in China, Wu (2006) and some other scholars introduced the “Zhejiang Model” based on the success of entrepreneurs in that province; however, this relates almost entirely to industries or clusters initiated after 1949. In a presentation this year, Porter (2008) raised some of his recent findings in clusters and regional prosperity, indicating that there is no significant difference in positions between high-tech clusters and other clusters in terms of their impacts on regional job growth rates, salaries, and patenting. This is thus a suitable time to explore beyond industrial clusters.

This thesis aims to reveal the unique attributes of cultural clusters, through analysis of the classical literature about the Jingdezhen porcelain cluster as well as raw data collected on site at Jingdezhen, including observation field notes and interviews. Because there is nearly no research into the nature of traditional culture clusters from a business perspective, research into the humanities in China can provide little analysis on the micro-economic phenomenon of clusters. Therefore, grounded theory would be the most suitable research methodology. It is a powerful method for collecting and analysing data, introduced by Glaser and Strauss in 1967 (Allan, 2003); it is considered one of the most rigorous research methods within qualitative research design.

The proposed thesis would have three sections. Section I would be a discussion of ontology, epistemology, and methodology in management research, especially the contributors in cluster and regional economics research. It will also include a section
on Chinese researchers in management, economic, and arts that have some relevance to Chinese traditional cultural cluster research. Finally, there will be a chapter of self-assessment of ontology, epistemology, and methodology preferences. Section II will be the methodology design of the research project. It will start with a discussion of why grounded theory is the most suitable methodology to conduct this research. It will then be followed by a detailed design for data collection, analysis, and validation. The last part of Section II will present the findings from the data analysis. Section III will be the literature review of the current research on cultural clusters in the world. After the literature review, traditional cultural research will be positioned within the body of knowledge about clusters. Limitations and future research possibilities will also be discussed in this section.

Because ‘cluster’ is a relatively new concept, there is a scarcity of information from this perspective. This is particularly so in the case of traditional cultural clusters (a very recent development within this field). The porcelain industry in Jingdezhen is perhaps the best example worldwide of such a cluster, with a heritage of over two thousand years. A trip to Jingdezhen is a necessity in order to collect primary research data that is high in quality and relevance. It is also important to have close contact with Chinese experts in cluster research in order to develop a good understanding of current research carried out by Chinese scholars in this field. I have contacted two leading researchers in China. One is Professor Lili Fang, the author of the book ‘Jingdezhen Private Kiln’ (2002), Director of the Anthropology Department at the Chinese National Academy of Arts. The other is Professor Jici Wang, one of the pioneers of Chinese cluster research, and Vice-Director of Economic Geography at Peking University. These two scholars could be the most important contributors to my topic; Dr Fang could provide strong raw material support while Dr Wang could advise on cluster research in China. Although there are many museums around the world displaying antique porcelain from Jingdezhen, the actual source city will still be the best place to explore the nature of the cluster’s operation. It is, after all, the town that gave “China” its name in English, being the origin of “china” and “china clay”. This project would be significantly enhanced through collaborative research with Chinese researchers and a sufficient period of investigation in Jingdezhen itself.

Eight weeks would be a good length of time to conduct collaborative research and data collection using grounded theory. I would intend to travel in September and October in order to have sufficient time to complete the preliminary discussion on philosophy of management research and the design of research method before the trip. I plan to finish the first draft during December, and complete the whole project by the end of February 2009.

References:
Bergman E. & Feser, E. 1999, Industrial and Regional Clusters: Concepts and Comparative Applications, Regional Research Institute, WVU.


Appendix II: Ethical Approval Documents

7.2.1 Approved Ethical Approval Application

APPLICATION TO THE UNIVERSITY OF OTAGO HUMAN ETHICS COMMITTEE FOR ETHICAL APPROVAL OF A RESEARCH OR TEACHING PROPOSAL INVOLVING HUMAN PARTICIPANTS

1. University of Otago staff member responsible for project:
   André M. Everett

2. Department: Management

3. Contact details of staff member responsible:
   Associate Prof. Dr. André Everett
   Department of Management
   Phone: 64-3-479 7371
   Fax: 64-3-479 8173
   Email:aeverett@business.otago.ac.nz

4. Title of project: Exploration of Cluster Attributes in Traditional Cultural Clusters in China: The Case of the Jingdezhen Porcelain Cluster

5. Brief description in lay terms of the purpose of the project:
   This project is intended to obtain data for the researcher’s Masters thesis. This thesis aims to reveal the unique attributes of historical, culture-based clusters of industrial activity, through continuous and consistent collecting, analysising and comparing both classical literature and raw data (including observation, field notes, and interviews) by the instruction of Grounded Theory (Glaser and Strauss, 1967). Jingdezhen is the traditional home of China’s leading porcelain manufacturing. The research will include interviews with leading academic
researchers, librarians / archivists, and government officials at various levels in China.

6. Indicate type of project and names of other investigators and students:

   Staff Research
   Student Research  ✓  Student researcher: Ms. Yuting (Jane) Zhuang
   Multi-Centre trial

7. Is this a repeated class teaching activity?
   Yes  ✓  No  ✓

   If applying to continue a previously approved repeated class teaching activity, please provide Reference Number: - NA -

8. Intended start date of project: 1st September 2008

   Projected end date of project: 30th October 2008

9. Funding of project.

   Is the project to be funded:
   (a) Internally  ✓
   (b) Externally

10. Aim and description of project:

    Because the concept of a ‘cluster’ is relatively new, there is a scarcity of information from this perspective (Porter 1990). This is particularly so in the case of traditional cultural clusters (a very recent development within this field). The porcelain industry in the town of Jingdezhen, China, is perhaps the best example worldwide of such a cluster, with a heritage of over two thousand years (Embassy 2006) and a substantial historical record present in archives and museums. The products of this cluster, exported beginning in the 14th Century, are the origin of the name “China”; the blue-and-white porcelain from Jingdezhen is what the Wedgwood family copied to establish the first porcelain manufacture in England in the late 1700s (Jiangxi 2007; Shan 2006).

    This research project involves a trip to Jingdezhen, Beijing, and potentially other locations in China, in order to collect primary research data that is high in quality and relevance. People, organisations, and archives in Jingdezhen will form the core of this part of the research, particularly through on-site observation and cluster participant interviews. Part of the purpose is to conduct collaborative research with Chinese experts in cluster research, as well as interviewing them in order to develop a good understanding of current research carried out by Chinese scholars in this field. Visits to libraries and
archives (primarily in Beijing) are necessary to examine historical documents. All primary and secondary data collected through the trip will be analysed and compared through the whole research process under the grounded theory methodology.

Grounded theory appears to be the most suitable research methodology. It is a powerful research method for collecting and analysing data, originated by Glaser and Strauss (1967) (also Strauss 1987), and is considered to be one of the most rigorous research methods within qualitative research design. It is most appropriate in fields where existing theory and evidence are poorly developed – characteristic of the situation being researched here. By applying this research method, the researcher expects to generate theory based on the collected data.

The overall conceptual aims of this study are:

a. To discover the unique characteristics of traditional Chinese cultural clusters.
b. To investigate how can these unique characteristics contribute to contemporary Chinese clusters.
c. To determine how the linkage between traditional cluster(s) and contemporary cluster(s) could contribute to clustering efficiency in New Zealand and the rest of the world.

References:


11. Researcher or instructor experience and qualifications in this research area:

The student researcher (Jane Zhuang) has a PGDipCom and a Bachelor degree in International Business (Otago). She has held a special interest in cluster theory since 2005. In 2005, she finished a project report on the nutraceutical (health products) cluster in New Zealand; in 2006, she gained work experience in the tourism cluster in Dunedin (this is the second largest cluster in the city; education – featuring the University – is the largest, and both researchers are direct participants in this cluster). This Masters thesis is based on her exploratory research into the Jingdezhen (Jiangxi, China) porcelain cluster in 2007 as one of her Management class research reports.
This project represents the first time she is engaging in actual field work to support her research.

The supervisor (Assoc. Prof. André Everett) has a PhD in Management and has lectured on international management, strategic management, operations management, and research methods at Otago since 1992. He has also lectured on international strategic management (including clusters) to Chinese postgraduate management students, as part of Otago’s exchange program with our partner university in China, for 8 years. In December 2007, he visited the Jingdezhen porcelain cluster to conduct a preliminary field examination, determining that it is an appropriate target for Jane’s field research. He has visited numerous clusters in both New Zealand and China (as well as other countries), and has maintained an interest in cluster research for over 15 years.

12. Participants

12(a) Population from which participants are drawn:

All intended participants are located in China, in several locations of specific relevance to the cluster being studied. Participants sought are mainly:

1. Scholars and researchers involved in the cluster research field (located at universities, research institutions, archives, and museums in Beijing and Jingdezhen).

2. Scholars and researchers specialising in the field of Jingdezhen porcelain (located throughout China).

3. Local craftsmen, customers, business owners/managers, and similar stakeholders from supporting industries (Jingdezhen).

4. Local government officials in charge of the development of Jingdezhen’s porcelain industry and/or cluster.

The selection of these participant types is based on prescriptions by the originator of the current concept of industrial clusters, Michael Porter (Harvard Business School), which derives from his theory of national competitive advantage, consisting of demand conditions, related and supporting industries, factor conditions, firm strategy/structure/rivalry, and government.

12(b) Specify inclusion and exclusion criteria:

Inclusion – anyone who meets the criteria above (in 12(a)), which is (in general) any person connected to clusters or cluster research in China.

Exclusion – anyone not related to clusters or cluster research in China.
12(c) Number of participants:
The number of participants is unpredictable, according to the nature of grounded theory. Snowball sampling (using contacts to obtain further contacts) will be employed to reach theoretical saturation (Strauss, 1987). However, it is anticipated that only a limited number of visits and interviews could be conducted within the two-month fieldwork time frame; it is estimated that perhaps ten to twenty scholars/researchers, about thirty industry participants, and five to ten government officials will be interviewed or consulted. The precise numbers cannot be known in advance as the research will rely on the personal contact networks of the participants to gain access to additional interviewees.

12(d) Age range of participants:
Based on different types of stakeholders, the participants’ age range is anticipated to be between 20 and 60 years old.

12(e) Method of recruitment:
Some potential participants have been recruited by email (e.g., two professors in Beijing). Additional participants will be contacted through personal and academic network contacts, including additional members of the research teams of the two professors in Beijing. Some will be contacted directly in person at their places of business (e.g., shop owners, government officials, librarians, museum staff) in Jingdezhen.

12(f) Please specify any payment or reward to be offered:
-NA-

13. Methods and Procedures:
The interviews will be conducted in Chinese or English. Interviews will be recorded (based on permission given by the interviewee, via their signature on a consent form that specifically indicates that interviews will be recorded) and subsequently transcribed. The interviews conducted in Chinese will be coded in Chinese, and then categorised in English as the amount of interview records could be beyond the researcher’s ability to translate every word from Chinese to English. The categorical translation will be validated by staff members of the Chinese Department of the University of Otago before external publication.

All responses will be treated with high confidentiality and the information gathered will be used for academic purposes only. The interviewees will be informed of the nature of the research, and no deception of any sort will be practiced. All interviewees will be provided a copy of the general questions list in Chinese or in English (as shown below) in advance. No personal questions will be asked unless the researcher has the permission of the interviewees and respondents themselves. However, relevant demographic questions will be asked. All interviewees have the right to request a copy of the transcript of their interviews for their verification, and any amendments that they advise will be incorporated into the research.

The purpose of this study is to assist the researcher in completing her masters thesis, and the results will therefore be included in the thesis. All interviewees have the right to ask for a copy of the final research output (the thesis). Following the university’s standard policy, the resulting thesis will be made available in the University of Otago Library, Dunedin New Zealand for
research purposes. Further, the results of this study may be published in whole or in part. Given the nature of many of the participants – academic researchers and government officials – it is likely that it will be both necessary and appropriate to name them or to designate their position/title (e.g., to give academics credit for their research, and to indicate the role of various government offices). However, any personal information that the interviewees would not wish disclosed will remain confidential; this will be ensured through the process of returning transcripts of interviews to the interviewees for their confirmation and assent. The data/information collected will be securely stored in such a way that only the researcher and the supervisor will be able to gain access to it. At the end of the project, any personal information will be destroyed immediately except that, as required by the University’s research policy, any raw data on which the results of the project depend will be retained in secure storage for five years, after which it will be destroyed.

**Interview content**

Semi-structured interviews will be carried out based on the following open-ended questions:

**Demographics:** 个人资料
1. What is your name? 请问您的名字是什么？
2. What is your age? 请问您的年龄是多少？
3. What is your education background? 请问您的教育程度到哪里？
4. What is your research interest? 请问您的研究方向是什么？
5. What is your job/position? 请问您现在的工作或职业是什么？

**Clusters in China (in general): 中国集群概况**
6. What do you think about cluster research in China? 请问您对于中国产业集群的研究现状有什么看法？
7. Do present researchers in general focus more on the contemporary development of clusters or really pay attention to their origin? 请问当前的学者是否更注重于集群的现代化发展，或者是更注重集群本身的历史起源？
8. Do you think research into traditional cultural clusters could benefit the application of cluster theory to the development of modern industries and clusters? Why? 您是否觉得关于传统文化产业集群的研究可以帮助推动或优化现代工业或集群的发展？
9. In what aspects could traditional cultural research contribute to contemporary clusters or industries? 可否请您预测一下传统文化集群的研究可能从哪几个方面对现代产业或集群有助益？

**Jingdezhen Porcelain Cluster: 景德镇陶瓷集群**
10. What do you think about the Jingdezhen porcelain cluster? 请问您对于景德镇陶瓷集群有什么看法？
11. From your point of view, what problems or issues affect this cluster? Who should deal with them? 从您的角度来看，什么是影响这个集群的问题或因素？它们涉及到哪些人群？
12. How do you think cluster research can benefit the Jingdezhen porcelain industry? Why? 请问关于产业集群的研究将如何帮助景德镇陶瓷产业？为什么？
13. What are the unique characteristics you perceive in the Jingdezhen porcelain cluster?
as compared to other contemporary clusters, such as high-tech clusters, in China? 请问在您看来景德镇陶瓷产业相对于其他现代产业（譬如高科技产业），有何独特性？

14. Compliance with The Privacy Act 1993 and the Health Information Privacy Code 1994 imposes strict requirements concerning the collection, use and disclosure of personal information. These questions allow the Committee to assess compliance.
14(a) Are you collecting personal information directly from the individual concerned?
YES

If you are collecting the information indirectly, please explain why: -NA-

14(b) If you are collecting personal information directly from the individual concerned, specify the steps taken to make participants aware of the following points:

• the fact that you are collecting the information: In the information sheet, participants are informed that the researcher is collecting the information.

• the purpose for which you are collecting the information and the uses you propose to make of it: In the information sheet, participants are informed that information from the interviews is gathered for the purpose of completing the researcher’s Masters thesis, and only the researcher and her supervisor will have access to their information.

• who will receive the information: In the information sheet, participants are informed that the information from the interviews will be used to complete the researcher’s Masters thesis, and following the university’s standard policy, such dissertations will be made available in the University of Otago Library, Dunedin New Zealand for research purposes. Further, the results of this study may be published in whole or in part, in both Western and Chinese academic research publications (such as journals and conferences).

• the consequences, if any, of not supplying the information: In the information sheet, participants are made aware that there will be no disadvantage to them if they are not willing to supply the information or even participate in the research.

• the individual's rights of access to and correction of personal information: In the information sheet, participants will be informed that they have the right to obtain a copy of the transcript of their interviews for their verification, and any amendments that they advise will be incorporated into the research.

14(c) If you are not making participants aware of any of the points in (b), please explain why: -NA-

14(d) Does the research or teaching project involve any form of deception?
NO

If yes, please explain all debriefing procedures: -NA-
14(e) Please outline your storage and security procedures to guard against unauthorised access, use or disclosure and how long you propose to keep personal information:

The data/information collected will be securely stored in such a way that only the researcher and the supervisor will be able to gain access to it. Specifically, it will be kept in a locked filing cabinet in the researcher’s office at the University. At the end of the project, any personal information will be destroyed immediately except that, as required by the University’s research policy, any raw data on which the results of the project depend will be retained in secure storage by the Management Department for five years, after which it will be destroyed.

14(f) Please explain how you will ensure that the personal information you collect is accurate, up to date, complete, relevant and not misleading:

The method of personally interviewing the participants ensures that whatever personal information received is accurate and up to date. In addition, by using structured interview questions, the researcher will make sure that whatever information collected is complete, relevant, and not misleading.

14(g) Who do you propose will have access to personal information, under what conditions, and subject to what safeguards against unauthorised disclosure?

The personal information can only be accessed by the researcher and her supervisor.

14(h) Do you intend to publish any personal information and in what form do you intend to do this?

The personal information of the interviewees will be withheld and not disclosed in the thesis. Only relevant information from the interviews will be used in the dissertation. Given the nature of many of the participants – academic researchers and government officials – it is likely that it will be both necessary and appropriate to name them or to designate their position/title (e.g., to give academics credit for their research, and to indicate the role of various government offices). However, any personal information that the interviewees would not wish disclosed will remain confidential; this will be ensured through the process of returning transcripts of interviews to the interviewees for their confirmation and assent.

14(i) Do you propose to collect information on ethnicity?

-NA-

15. Potential problems: The researcher does not anticipate any major problems since participants are invited on a voluntary basis to participate in the research (interview).

16. Informed consent

Please attach the information sheet and the consent form to this application. The information sheet and consent form must be separate.

At a minimum the Information Sheet must describe in lay terms:

• the nature and purpose of the research;
• the procedure and how long it will take;
• any risk or discomfort involved;
• who will have access and under what conditions to any personal information;
• the eventual disposal of data collected;
• the name and contact details of the staff member responsible for the project and an invitation to contact that person over any matter associated with the project;
• details of remuneration offered for participation and compensation payable in the event of harm;
• Exclusion criteria for the project if applicable including Health Concerns. *(If exclusion include a clear statement to the effect that: “People who meet one or more of the exclusion criteria set out above may not participate in this project, because in the opinion of the researchers and the University of Otago Human Ethics Committtee, it involves unacceptable risk to them.”)*

and any other relevant matters

The Information Sheet must conclude with the statement: "The University of Otago Human Ethics Committee has reviewed and approved this project."

The Consent Form must make it clear that a participant:

• understands the nature of the proposal;
• has had all questions satisfactorily answered;
• is aware of what will become of the data (including video or audio tapes and data held electronically) at the conclusion of the project;
• knows that he or she is free to withdraw from the project at any time without disadvantage;
• is aware of risks, remuneration and compensation;
• is aware that the data may be published;
• is aware that a third party (i.e. transcriber) may have access to the data;
• is aware that every effort will be made to preserve the anonymity of the participant unless the participant gives an express waiver, which must be in addition to and separate from this consent form.

17. **Fast-Track procedure**  Do you request fast-track consideration?

NO

If yes, please state specific reasons:-

18. **Other committees**

If any other ethics committee has considered or will consider the proposal which is the subject of this application, please give details:  -NA-

19. **Applicant's Signature:** .................................................................
    **Date:** ..............................

20. **Departmental approval:**  *I have read this application and believe it to be scientifically and*
ethically sound. I approve the research design. The Research proposed in this application is compatible with the University of Otago policies and I give my consent for the application to be forwarded to the University of Otago Human Ethics Committee with my recommendation that it be approved.

Signature of *Head of Department: .................................................................

Date: .................................

*(In cases where the Head of Department is also the principal researcher then the appropriate Dean or Pro-Vice-Chancellor must sign)

Please attach copies of the Information Sheet and Consent Form
从景德镇陶瓷集群探索中国传统文化产业集群独特性

给参与者的信息单

非常感谢您表示对本硕士课题的兴趣。请您在决定是否参与本项目前先仔细阅读本信息单。如果您愿意参与，我们表示感谢。若您最后决定不参与，您将不会在任何方面受到不利影响，我们同样感谢你对我们邀请的考虑。

本项目的目的是什么?
本硕士论文的目标即通过分析关于景德镇陶瓷集群的古典著作并收集相关原始数据，通过观察、田野日志和采访的方式去发掘中国文化产业集群的独特性。本研究致力于从商业的角度去探索传统文化集群的面貌，并将其与现代产业进行比较研究。

有哪些参与者?
参与者类型主要为：

1. 在北京和景德镇高校，研究单位，信息单位并博物馆中研究与集群相关课题的学者和研究员。
2. 在中国各地研究与景德镇陶瓷相关的学者和研究员。
3. 在景德镇本地的工匠、顾客、陶瓷经营商及管理层人员，并其他支持本产业的相关人员。
4. 景德镇当地与陶瓷产业发展相关的政府官员。

参与者会被要求做什么?
您是否愿意参与这个半组织形态的访问；本访问将费时半个小时到一个小时（在需要并获得您的允许的情况下可能延长）？在您的允许下，本次访问将用录音的形式进行，录音材料在随后将被主要研究员转换成文字。您有权要求持有一份录音的文字材料，并在在研究分析前进行审视，修改和补充。
（请注意您可能决定不参与本项目，您的决定不会给您带来任何不利影响；您可能在任何时候退出本项目研究，而您的决定不会给您带来任何不利影响。）

研究员将会收集哪些信息并做何用途?
研究员将会收集体现景德镇陶瓷集群作为传统文化集群的重要特征的信息。这些信息在经过分析后将有利于中国及其他国家的传统和现代产业集群。

本项目的结果将做何处理?
本项目的目的是帮助研究员完成其硕士论文，本项目的结果将成为其论文的一部分。根据大学规定，此类论文将被存放在新西兰但丁奥塔古大学图书馆内以便作研究之用。其次，本项目结果有可能全部（作为教科书）或部分被发表（在专业杂志、报刊和会议上）。根据有意愿参与者的实际情况和特殊身份，其中有前沿学者，相关的政府官员和当地政府成员，他们很有可能成为论文的阅读者。当中的学者可能希望他们的研究和建议被计算在内；政府官员可能希望他们对于本集群的发展和管理得到肯定；经商人员可能希望他们的努力被认可等等。从许多情况中根据被参访者的职位和工作单位，标明信息出处是很重要的。但是，若有参与者在任何情况下希望他们的名字，职位或任何具体信息保持机密将会被尊重，这些信息将不会向研究员及其导师以外的任何人透露。
Collecting the materials will be kept secure only in places and ways of the two researchers mentioned above. When this project is over, any personal data will be destroyed under university research policy. Any原始 data will be kept for 5 years and then destroyed.

If you have any questions or need for reports, you can contact either of the researchers mentioned below:

庄育婷 Yuting Zhuang (Principal Investigator)
New Zealand University of Otago, Management Department
University telephone: 64-3-479 5094
University fax: 64-3-479 8173
Email: yzhuang@business.otago.ac.nz

Or Dr. André Everett (Associate Professor, Tutor)
University of Otago, Management Department
Phone: 64-3-479 7371
Fax: 64-3-479 8173
Email: aeverett@business.otago.ac.nz

Thank you for reading this information sheet.

The University of Otago Human Ethics Committee has reviewed and approved this project.
2008年八月

从景德镇陶瓷集群探索中国传统文化产业集群独特性

参与者同意书

我已经读过关于本项目的信息单并了解其中的内容。我知道我可以自由地在任何阶段要求更多信息。

我知道:

1. 我对于此项目的参与完全是义务性的；
2. 我有自由在任何时间从此项目中撤回并无任何不利影响；
3. 我的参与最主要是让研究员半小时到一个小时的时间进行采访，本次采访将用录音的形式并接着转换为文字材料，我有权获得一份转换后的文字材料并可在被研究分析前进行审视、修改和补充；
4. 此录音记录和抄本将被取名编号，并只有研究员及其导师可以取得。在本项目结束，数据将被销毁，但任何产生本项目结果的原始数据（录音记录和抄本）将被安全保存五年，五年后被销毁；
5. 本项目将采用开放式问题的方法，此方法让问题更为简洁，不事前安排问题。问题取决于采访如何进行。如果问题的发展让我觉得迟疑或不舒服，我可能拒绝回答具体问题或从此项目中撤回并无任何不利影响；
6. 本项目结果可能被发表并存放在新西兰但尼丁奥塔古大学图书馆，但每一次尝试引用数据将会被保存为无记名形式。根据有意愿参与者的实际情况和特殊身份，其中有关学者、相关的政府官员和当地产业成员，他们很有可能成为论文的阅读者。当中的学者可能希望他们的研究和建议被计算在内；政府官员可能希望他们对于本集群的发展和管理得到肯定；经营人员可能希望他们的努力被认可等等。从许多情况中根据被采访者的职位和工作单位，标明信息出处是很重要的。但是，若有参与者在任何情况下希望他们的名字、职位或任何具体信息保持机密将会被尊重，这些信息将不会向研究员及其导师以外的任何人透露；并且
7. 数据通过电子邮件的方式传递将会采用适当的预防，但这并不能保证数据的安全。

我愿意参与这个项目。

.............................................................................

(参与者签名)   (时间)

.............................................................................

(参与者姓名)
奥塔古大学人类伦理道德委员会已审核并批准本项目。
7.2.2 Departmental Approval

If yes, please state specific reasons:

18. Other committees

If any other ethics committee has considered or will consider the proposal which is the subject of this application, please give details: -NA-

19. Applicant's Signature: 

Date: 1/3/08

20. Departmental approval: I have read this application and believe it to be scientifically and ethically sound. I approve the research design. The research proposed in this application is compatible with the University of Osgo policies and I give my consent for the application to be forwarded to the University of Osgo Human Ethics Committee with my recommendation that it be approved.

Signature of *Head of Department: 

Date: 1/3/08

Application Form for ethical consideration of research and teaching proposals involving human participants

*(In cases where the Head of Department is also the principal researcher then the appropriate Dean or Pro-Vice-Chancellor must sign)
7.2.3 Ethical Committee Reference Code

Assoc. Prof. A Everett  
Department of Management  
Division of Commerce  
School of Business  

Dear Assoc. Prof. Everett,

I am writing to thank you for sending to me copies of your proposal entitled ‘Exploration of cluster attributes in traditional cultural clusters in China: The case of the Jingdezhen Porcelain cluster’.

The next meeting of the Ethics Committee is scheduled for Thursday, 21 August 2008.

I shall ensure that your application is considered at that meeting and I anticipate that I will be able to let you know the outcome early in the following week.

For your future reference, the Ethics Committee’s reference code for this project is: 08/128.

Yours sincerely,

Mr G K (Gary) Witte  
Manager, Academic Committees  
Tel: 479-8256  
Email: gary.witte@stonebow.otago.ac.nz
## 7.2.4 Conditional Approval of Human Ethics Committee

22 August 2008

Assoc Prof A Everett
Department of Management
Division of Commerce
School of Business

Dear Assoc Prof Everett,

I am writing to let you know that, at its recent meeting, the Ethics Committee considered your proposal entitled "Exploration of cluster attributes in traditional cultural clusters in China: The case of the Jingdezhen Porcelain cluster".

As a result of that consideration, the current status of your proposal is: Approved.

For your future reference, the Ethics Committee’s reference code for this project is: 08/128. The comments and views expressed by the Ethics Committee concerning your proposal are as follows:

While approving the application, the Committee would be grateful if you would respond to the following:

On page 6 you have supplied the Committee with the line of questioning to be used. It appears as if it is expected that participants will know what the cluster theory is. Is this appropriate? The Committee acknowledges that this may be entirely appropriate if the participants are all knowledgeable in this field.

In section 13 of the application it is stated that the "categorical translation will be validated by staff members of the Chinese Department of the University of Otago before external publication". Have negotiations already occurred to secure this arrangement?

Please ensure that the Information Sheet and Consent Form are available to participants in a Chinese translation.

Where the "University Library" is mentioned in the Information Sheet and Consent Form, please state the "University of Otago Library, Dunedin, New Zealand".

Approval is for up to three years. If this project has not been completed within three years from the date of this letter, re-approval must be requested. If the nature, consent, location, procedures or personnel of your approved application change, please advise me in writing.

Yours sincerely,

Mr G K (Gary) Witte
Academic Committees, Academic Services
Tel: 479 5256
Email: gary.witte@otago.ac.nz

cc: Professor A Geare  Head  Department of Management
7.2.5 Fully Approval by Human Ethics Committee

Associate Professor André Everett  
Department of Management  
Commerce Building  
University of Otago

29 August 2008  
08/128

Dear Associate Professor Everett

Re: Exploration of cluster attributes in traditional cultural clusters in China: The case of the Jingdezhen Porcelain cluster  

Thank you for your email to me in response to the concerns of the University of Otago Human Ethics Committee. The Committee was especially impressed with the depth of the answers supplied.

Your proposal continues to be fully approved by the Human Ethics Committee. If the nature, consent, location, procedures or personnel of your approved application change, please advise me in writing. I hope all goes well for you with your upcoming research.

Yours sincerely

Gary Witte  
Manager, Academic Committees  
University of Otago

cc. Professor Alan Geare (Head of Department), Management

Academic Committees  
PO Box 54, Dunedin 9014, New Zealand
Tel: +64 3 479 8216 • Fax: +64 3 479 8221 • Email: gary.witte@otago.ac.nz  
www.otago.ac.nz
7.3 Appendix III: Pre-research Documentary

7.3.1 The Profiles of the Two Distinct Researchers in China

7.3.1.1 Dr. Jici Wang, Professor

王缉慈，女，汉族。1946年2月生于昆明。籍贯广西博白。北京大学城市与环境学院教授、博士生导师，国际地理联合会经济空间动态委员会指导委员（IGU Commission on Dynamics of Economic Space, The members of the Steering Committee）、中国地理学会经济地理专业委员会副主任、清华大学21世纪研究院兼职教授。其它兼职工作有：《北京大学学报（自然科学版）》编辑、《世界地理研究》副主编、《地域研究与开发》副主编，国家科技部火炬中心专家组成员、内蒙古自治区科技顾问、陕西西安高新区产业发展顾问、河南登封市经济 发展顾问等。


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7.3.2 The Request for Collaboration Research

7.3.2.1 Email Request to Dr. Jici Wang

尊敬的王缉慈老师，

您好！

本人名字叫庄育婷，籍贯福建厦门，是新西兰奥塔哥大学商学院管理系的一名在读硕士研究生。我写这封信的目的是希望有幸能够在产业集群研究上能得到王老师的指导；其次也在于寻求新西兰与中国在经济研究领域交流合作的机会。本人现在正在申请 New Zealand Postgraduate Study Abroad Awards (NZPSAA)，这个奖项的目的之一在于加强新西兰与中国的学术交流，以促进两国在经济研究领域的深入合作。希望您能提供宝贵的指导和建议，帮助我更好地进行学术研究。期待能得到您回复。

此致
敬礼！

庄育婷

(Retrived 7 June, 2008, from
http://www.zgysyjy.org.cn/newart/neiyongye.jsp?class_id=642&jigou=12_05_14)
院校与世界各学院之间的学术交流。

由于研究景德镇陶瓷产业集群的需要，我阅读了一部分王老师的著作文献。特别是刊载在地方产业集群研究网和中国工业集群期刊上的文章。王老师是产业集群研究的先驱之一。您对于西方关于经济地理学和古典经济学都有很深入的理解。您的理论架构也是国内许多学者争相借鉴的对象。在过去二十年中有许多著名的学者的重点研究的案例都是工业集群，包括 Michael Porter。在今年一月份在瑞典的讲座中，Porter 提到他的最近的研究发现是：在就业增长率，工资和专利申请上，高科技产业相对于其他产业没有明显的优势。或许这正是研究传统文化产业集群的时机。Porter 在《国家竞争力》（1990）一书中所采用的最古老的个案包括威尼斯的造船业和意大利的瓷器业。这些产业相对于中国的茶工业，陶瓷工业，丝绸等传统产业，都显得年轻了许多。我相信的是，中国的传统产业的复兴，需要的是适用于中国传统文化产业的理论，以中国人普遍可以理解的方式，去推动带有产业文化特色的策略，最终产生别于他国且根植于中国文化的竞争力。或许我在表达这方面的理想时，已显露出我对中国现阶段的产业集群研究的不成熟。也正是这个原因，我盼望能有机会在关于产业集群理论上，尤其是中国在方面的研究现状向王老师讨教和学习。

今年是我对景德镇的研究的第二年。起初它只是我作为中国传统产业集群的一个切入点。当我对景德镇陶瓷的学习研究逐渐深入之后，我心中越来越放不下这个陶瓷名镇。从关于这个产业的一些二手材料中，我惊讶地发现在景德镇陶瓷产业集群的中国传统产业中，其表现出来的独特性和内涵是许多西方个案所不具备的。也正是这样的独特性让我去更有信心去质疑现存理论中的缺失，以及这些理论在中国文化产业的不适应性。我在现阶段所采用的研究方法是 Grounded Theory。我的论文第一部分会先系统地讨论不同的世界观，认知论和方法论。在第二部分的数据收集与分析中，我会先从古典名著中去寻找产业运作的线索，再者我需要到中国去做实地考察和访问。第三部分我会讨论一下现阶段学者在相关领域的研究，如果能获得王老师的指导，我能更好地对现阶段的研究做出合理的分析判断。奥塔哥大学是新西兰研究质量第一的学府也是新西兰最古老最优秀的大学，而北京大学是中国文科类院校中最优秀的大学。我相信这样的合作对促进两个院校在各个方面的交流研究都是有益的。

我的导师 Dr. André Everett 艾安德烈博士是武汉华中科大 EMBA 课程的海外客座教授，他本人近来年每年都会到中国各大中城市开课，并对中国文化产生非常浓厚的兴趣。他的专业领域包括国际管理、战略管理、运作管理和知识管理。在方法论上他是 survey research method 方面的专家。 （艾博士简历 http://www.business.otago.ac.nz/mgmt/staff/everett.html）我们都希望通过对景德镇陶瓷产业的研究可以在中国文化产业集群整体研究中有所贡献。

若能促成此行，我需要申请新西兰研究生海外研究的课题经费。若北京大学能出示邀请函表示对我此行到北京和景德镇的研究合作的兴趣，那将会大大提高我获得补助的可能性。本人将不胜感激。教育部门方面只是需要我提供合作院校的一份英文电子邮件邀请函既可。经费申请需要在五月一日前寄出，希望老师不吝在近日给我一个答复。我的计划是，如果能成行，九月到十月是最好的时间段。一是避免奥运会的人潮，而是配合我的研究进度。这部分的研究只是我博士研究的预备，相信在不久的将来，我们还有更多交流探讨的机会。

祝安康！

庄育婷

33
Re: Request for Collaborative Research and Supervision in Traditional Clusters

Dear Dr. Jici Wang,

My name is Yuting (Jane) Zhuang. I am a masters’ student from the University of Otago in New Zealand. My research target is Jingdezhen porcelain cluster in Jingxi, China. I write to seek advices on current cluster research approaches in China; moreover, we also look forward to having research linkages with Beijing University in business areas. I am on my way to apply for New Zealand Postgraduate Study Abroad Awards (http://www.newzealandeducated.com/scholarships). One of the objectives of the NZPSAA is to increase international education linkages and partnerships with participating countries, regions and institutions.

I have read some literatures written by you in English and Chinese last year and included them in the literature review section for my 400-level international business report – Conformation of Michael Porter’s cluster theory through Jingdezhen porcelain cluster. I found that you are one of the pioneer researchers in economic geography and clusters in China. You have great understanding of past and current economic geography and classical economics. In the past twenty years of cluster research, most of the distinctive researchers have been focused on industrial clusters, including Michael Porter. Porter mentioned his recent findings in Stenholm, Sweden early this year, one of them was there is no significant differences between high-tech clusters with other clusters in terms of job growth rate, salaries and patenting. It might be a good time to start researching on traditional cultural clusters. In the Competitive Advantage of Nations (1990), the cases with long development history are shipping industry in Vienna and ceramic tile industry in Italy. However, comparing to tea, porcelain and silk industries in china, these industries are very fresh. I believe that, the prosperity of Chinese cultural industry has to use Chinese-style cluster theory, in a way that Chinese could understand, promote strategies with Chinese features; in order to generate unique competitive advantage that rooted in Chinese culture. Perhaps, my concepts are very immature and lack of understanding on current cluster research in China. This concern drives me to base my research not only in New Zealand but also in China to gain more comprehensive understanding in this field. I believe that your supervision would be very helpful from this approach.

This is my second year of masters, and second year of researching Jingdezhen porcelain cluster. In the first place, I picked Jingdezhen as my start-up case in traditional cluster research. However, I have addicted to it after one year of exploration. There are too many surprises from literatures about Jingdezhen that distinct it from the rest in the western world. The uniqueness and richness of Jingdezhen porcelain cluster grant me more confident of further research in traditional cluster and to doubt the adaptability of western theory in Chinese traditional clusters. I have planned to use Grounded Theory as my research methodology. In Part I, I will discuss the main streams of ontology, epistemology and methodology in management research. Part II will include methodology, data collection and analysis. The data section will include literatures about Jingdezhen cluster; and interviews and field notes etc from Jingdezhen. Part III will be the back up literature review of the current research on cultural clusters in the world. This part might be
improved significantly with your supervision. University of Otago is the top-ranked university of New Zealand in research; whilst, Beijing University is the top university in humanity. I believe that the education linkage between the two universities and two divisions is beneficial.

My supervisor Dr. André Everett had visited Jingdezhen to collect some data for me during his teaching in China from end of 2007 to early 2008. He is one of the guest lecturers in the EMBA program of Huazhong University of Science and Technology. We both share a strong interest in Chinese culture and would like to contribute to cultural clusters (Link to André’s personal profile: http://www.business.otago.ac.nz/mgmt/staff/aeverett.html)

I am currently applying New Zealand Postgraduate Study Abroad Awards (NZPSAA). It would be more than helpful to gain an invitation from Beijing University to show your interest in such collaborative research and supervision. An English email invitation will do for this application. September to October 2008 will be the most suitable time for me to go over. One reason is to avoid the crowd of Beijing Olympic Games; the other reason is my research procedure. I am very likely to continue this research to the doctoral level, thus, such collaborative research will not be temporary, but it will last for a while.

Your sincerely,

Yuting Zhuang
MCom
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7.3.2.2 Email Request to Dr. Lili Fang

尊敬的方李莉老师，

您好！

本人名字叫庄育婷，籍贯福建厦门，是新西兰奥塔哥大学商学院管理系的一名在读硕士研究生。我写这封信的目的是希望有幸能够在景德镇陶瓷产业在能得到方老师的指导；其次也在于寻求新西兰与中国在人文科学研究领域交流合作的机会。本人现在正在申请 New Zealand Postgraduate Study Abroad Awards (NZPSAA)，这个奖项的目的之一在于加强新西兰院校与世界各学院之间的学术交流。

由于研究景德镇陶瓷产业集群的需要，我拜读了您的作品《景德镇民窑》(2002 年由人民美术出版社出版)。从作品中，不仅发现方老师对景德镇陶瓷产业横向与纵向都有深
度的了解及独特的见地，更发现您对中国特色文化深深的热爱与尊敬。您对中国传统文化的热情在所学的学术中没有被压制，而是更坚定地表现出来。本人认为中国文化产业的出路正需要在热烈的文化情感支撑下坚持不懈地观察、探索、分析、解释、归纳、整理与总结，以找出最适合本国文化性质的发展道路。中国文化的传承不仅仅是民族性的问题，也是个人性的问题。我们所流失的正是我们作为中国人身份的重要组成部分。遗憾的是，这些传统文化正在流失中。而我们也因此失去了许多探索了解我们自己民族的机会。

今年是我对景德镇的研究的第二年。起初它只是我作为中国传统产业集群的一个切入点。当我对景德镇陶瓷的学习研究逐渐深入之后，我心中越来越放不下这个陶瓷名镇。从关于这个产业的一些二手材料中，我惊讶地发现在景德镇陶瓷产业代表的中国传统产业中，其表现出来的独特性和内涵是许多西方个案所不具备的。这也是这样的独特性让我更有信心去质疑学界理论中的缺失，以及这些理论在中国文化产业的不适性。现在关于地域经济、产业集群、专业镇等的研究立论都是西方的。中国学者在理论领域贡献极微，较多是同一理论在不同环境的应用，或不同经济模式中的应用。在谈到国家竞争力所用的创造力时，立论也多是西方的。我阅读的文献多为英文，中文的却很少，所以可能有偏差。当我慢慢了解景德镇陶瓷产业，我里面却产生了强烈的意识，即中国文化其实是极富创造力的!而这个创造力却没有自己的理论。光有创造力是不行的，中国人还需要有自己的理论，中国才能谈真正的可持续发展。西方的理论很多都是很优秀的，但是否适用于中国呢？这个问题需要我们更多地思考，尤其在这个浮躁的商业圈。

我在现阶段所采用的研究方法是 Grounded Theory，这种方法论是 Qualitative Research 质的研究方法中相对严谨的。而它的特点在于细腻的数据处理与分析。我的论文第一部分会先系统地讨论不同的世界观、认识论和方法论。在第二部分的数据收集与分析中，我会先从古典名著中去寻找产业运作的线索，其次我需要到中国去采集资料，包括实地考察和访问。如果能有幸与方老师合作的话。我相信必定能事半功倍。我对方老师 2007 年 10 月到 12 月在景德镇所做的研究数据很有兴趣，因为这组数据更接近我的研究领域。奥塔哥大学是新西兰研究质量第一的学府，也是最古老最优秀的大学，而中国美术研究院是中国人文科学研究的首府。我相信这样的合作对促进两个院校在人文科学方面的交流研究都是颇有益的。

我的导师 Dr. André Everett 艾安德烈博士也在去年十二月帮助我到景德镇陶瓷馆、陶瓷民俗博物馆和考古地区采集一些材料。因为整个行程安排上的困难，加上他本人不识中文，所以很难收集到的材料非常有限。但是他仍然帮忙收集到景德镇陶瓷学院熊教授的《中国陶瓷古籍集成》以及您的作品《景德镇民窑》。这已经让我倍感安慰了。艾博士是武汉华中科技大学 EMBA 课程的海外兼职教授，他本人近年来都会到中国各大中城市开课，并对中国文化产生非常浓厚的兴趣。他的专业领域包括国际管理、战略管理、运作管理和知识管理。在方法论上他擅长 survey research method 方面的专家。（艾博士简历 http://www.business.otago.ac.nz/mgmt/staff/aeverett.html）我们都希望通过对景德镇陶瓷产业的研究可以在中国文化产业整体研究中有所贡献。而当今之计必须先解决理论的问题。我们希望两个部门通过研究方法的探讨和数据资源的共享使中国在传统产业理论架构的建设上有所建树。

若能促成此行，我需要申请新西兰研究生海外研究的课题经费，此经费将涵盖我在中国的一切费用。若中国艺术研究院能出示邀请函表示对我此行到北京和景德镇的研究合作
Re: Request for Collaborative Research on Jingdezhen Porcelain Cluster

Dear Dr. Fang Lili,

My name is Yuting (Jane) Zhuang. I am a masters’ student from the University of Otago in New Zealand. I am currently reading your "Jingdezhen Private Kilns" published in 2002. It is an insightful book which provides enormously valuable social and economical data. I have held a special interest in the Jingdezhen porcelain industry for several years, and intend to conduct theory-based research into Chinese traditional clusters as my PhD thesis research topic in the field of management. Last year, I wrote a report confirming the applicability of Michael Porter’s cluster theory to the Jingdezhen porcelain cluster as part of a post-graduate research course. Porter’s competitive advantage model (which is well-known as the CAN model) is quite popular in regional economic research in China and the rest of the world. However, through analysis of some secondary data, I have found that the theory has some weaknesses when applied in the context of the Chinese economy due to the conflicts of philosophies of theory building, empirical case attributions, cultures, languages, social structures, government policies, cluster life cycles, etc. There is a certain amount of theory application failure in cluster agglomeration in China. My intended research into the Jingdezhen porcelain cluster is also for the purpose of finding a sustainable economic model for Chinese society to build its unique competitive advantages.

Your data collection in Jingdezhen from October to December 2007 has some relevance to my area of research (referring to the Chinese National Academy of Arts website, 2008). I would like to ask if it would be possible for me to conduct collaborative research with your department. The University of Otago is the top-ranked university of New Zealand in research, and is the oldest and most prestigious university in the country. We are advanced in research methodology in a wide range of fields, such as philosophy and health sciences. The Chinese National Academy of Arts is the top-ranked arts research, education, and production institution in China. I believe such collaborative research would enhance mutual understandings of academic research in both countries and in both universities. Furthermore, we believe that the China-New Zealand Free Trade Agreement that has been signed this month would also welcome and encourage such collaborative research, which sparks new joint study areas in the traditional Cluster Research for our mutual benefit in humanities studies.

My supervisor Dr. André Everett visited Jingdezhen also in December 2007 to collect some data for me during his teaching in China. He has been to the Jingdezhen Museum of Porcelain and
some other historical places. Dr Everett is an adjunct professor in the EMBA program of Huazhong University of Science and Technology. We both share a strong interest in Chinese culture and would like to contribute to cultural clusters from a business perspective. There are not many publications that discuss cultural clusters either in China or overseas, but high-tech clusters. We believe that Chinese cultural clusters have their own way of thinking and own way of managing and own way of learning. Before we could actually improve the cluster learning potential through action research or consultation, we have to first generate cluster theories from China for Chinese traditional clusters. This is the area the two university departments could work on together from different dimensions.  

(Link to André’s personal profile: http://www.business.otago.ac.nz/mgmt/staff/aeverett.html)

I am currently applying for a New Zealand Postgraduate Study Abroad Award (NZPSAA), which would fully fund my intended visit to China. It would be more than helpful to gain an invitation from the Chinese National Academy of Arts to show your interest in such collaborative research. An English email invitation will do for this application. Because the deadline for the award application is on May 1, please reply to me as soon as possible. September to October 2008 will be the most suitable time for me to come to China. One reason is to avoid the crowd during the Beijing Olympic Games; the other reason is my research procedure. I am very likely to continue this research to the doctoral level, thus, such collaborative research will not be temporary, but it will last for a while.

Yours sincerely,

Yuting Zhuang  
MCom Student  
Department of Management  
School of Business  
Commerce Building, Clyde and Union Streets  
PO Box 56  
Dunedin 9054  
New Zealand  
Tel 64 3 479 5094  
Email: yzhuang@business.otago.ac.nz
7.3.3 Invitation Letters
7.3.3.1 Invitation Letter from Peking University

April 20, 2008

Invitation for Collaborative Research

To whom it may concern

I welcome Yuting (Jane) Zhuang from the Department of Management, the University of Otago, to conduct collaborative research with me at Peking University in Beijing, China from September 1 to October 30, 2008. The collaborative research topic is the master’s thesis topic of Yuting Zhuang concerning the Jingdezhen traditional porcelain cluster. I will provide assistance regarding the direction of current cluster research in China and access to materials that are published in Chinese. I deeply regret that we are unable to provide financial support, it is expected that the visiting researcher will be self-funded for the duration of her stay in China.

Sincerely,

Ji Li Wang, Professor

Department of Urban and Economic Geography
College of Urban and Environmental Sciences
Peking University, Beijing, 100871, China
Tel: 86-10-62752383, 13910523179

7.3.3.2 Invitation from Dr. Lili Fang (Translated)

庄育婷：
对不起，这一段时间我到外地做田野，没有看邮箱。我和我们课题住的学者们商量过，愿意邀请你参加我们有关“景德镇陶瓷手工艺的传承与社会发展”的课题研究。我们这一课题是有蒋金国基金会资助的，与法国社会科学院中国研究所合作的，我们希望能由多个国家的学者合作，对景德镇的陶瓷历史及陶瓷业进行不同角度的考察与研究。我们这个课题组的中方学者基本都是从事人类学专业的，而法国方面的学者则是从事历史学研究的。如果你能从文化产业的角度来研究，我认为也是有价值的。只是我们的经费有限，不能提供你经费上的资助，需要你从其他的渠道申请。

祝：成功！

方李莉

Translated from the original email from Dr. Lili Fang by candidate Yuting Zhuang for your convenience.
Dear Yuting Zhuang,

I apologize that I did not check the emails for a while as I was doing field research outside Beijing. I have discussed with scholars from our project team, we would like to invite you to join our research project on “Hereditary and Social Development of Jingdezhen Porcelain Handcrafts”. This research project was funded by “Chiang Ching-kuo Foundation for International Scholarly Exchange” (Link: http://www.cckf.org/index-e.htm). This project cooperates with the French Academy of Social Sciences, the Chinese Research Institute. We hope to have multi-national scholars to research from different perspectives about the porcelain history and the industry of Jingdezhen. The Chinese scholars in our team are mostly specialised in Humanity; whereas, the French scholars are predominantly doing History research. If you can carry out studies from Cultural industry perspective, I think that would be valuable. However, the funding is limited; we could not provide scholarship for you. You need to apply for funding from other channel.

May you succeed!

Dr. Lili Fang
7.4 Appendix IV: Field Work
7.4.1 Field Work in Beijing
7.4.1.1 Peking University Campus

Department of Urban and Regional Planning (Where Dr. Jici Wang’s office located)

Paralympic Games Flag
7.4.1.2 Panjiayuan Antiques Market

Panjiayuan antiques market 1

Panjiayuan antiques market 2
9月4日 15: 25 P.M.
采访对象：王缉慈老师
年龄：62岁
教育背景：北大附小
清华大学
北大地质地理系
80年北大教书直到现在（2008）
研究兴趣：经济地理学中的工业地理学
工作：北京大学城市与环境学院教授

Jane：请问您对于中国产业集群的研究现状有何看法？
王：中国产业集群的研究可能是世界上最大的研究产业集群的队伍。现在很难统计有多少人在进行这方面的研究。基本上各个大学的经济地理专业、经济学专业、社会学专业、管理学专业，甚至文化方面的专业，工程方面的专业，农业方面的专业都有人在研究产业集群。现在的现状时很多人还在看海外大量的文献。因为文献实在是看不过来，太多太多了。很多人都是看国外文献或者是别人翻译过来的国外文献，还有国内，甚至是网上可以抄袭到的文献。就是用这些文献套用到中国产业集群的研究里面去。现在，大量的研究还是处在一个初级阶段。

Jane：所以是不是说更多的是在于理论的运用，并不是理论的创新和开发上面？
王：对！对！

Jane：请问现在（当前）的学者是否更注重于集群的现代化发展，或者更注重于集群本身的历史渊源、起源？
王：从我来说，我不是很了解别人，我还是更侧重于现代化发展，尤其是目前中国产业集群所面临的问题和它升级的途径。

Jane：所以您会不会觉得说研究它的现在发展比较能够应付或处理现在的问题，以至于您愿意更多花时间在现在整个集群发展上面。
王：对，对！不过现在也已经有人开始从衍化经济地理学或者是衍化经济学方面研究它发展
的路径。

Jane: 您提到有些人开始这样的研究，那您觉得这样的研究是否对于集群现代化的研究有帮助？

王: 当然有帮助，这里面要说到到底什么是中国的产业集群，就是中国有大量的所谓的产业集群，就是跟其它发达国家的那种 Innovative 的产业集群不一样，创新性的集群是不一样的。中国的很多集群都是劳动密集型的，很多的企业在同一个地方，但不一定真正的协作。很多的企业之间甚至是恶性竞争的。而且可能今天很多的企业在一起，明天就散掉了，就不存在了。这种 survival cluster 在中国很多很多。所以我觉得（我最近的一个感觉就是）这样的集群和历史上所形成的那样集群没有太大的区别。所谓没有太大的区别就是它这样的，我甚至觉得，我不知道你知道不知道在四川德阳有个三星堆，有个旅游区叫三星堆是青铜器的加工。一个三星堆的博物馆，我到那看到三星堆的时候我就想到在青铜器时代这个周围一定有很多做青铜器这方面的一些作坊，或者是很像 Marshall 的 Industrial History 这样，所以呢，现在所说的集群，其实就是这样的一种现象。历史上是很相像的，而且跟现在发展中国家的，比如印度、巴西很多都是很相像的。并不是说这样一些就一定是 Competitive 的，有可能他一下子就死亡了。

Jane: 您可否预测一下传统文化集群的研究可能从哪几个方面对现代产业有帮助？

王: 我想传统文化的产业集群，这个问题我还是真没考虑过。你所谓的传统文化产业集群可能就是指的是景德镇这样的

Jane: 类似

王: 还能举得出其它的例子吗？

Jane: 像苏州的丝绸、刺绣、茶工业，包括像一些传统小吃美食这方面。小吃还比较小一点，但像丝绸、传统雕刻

王: 我知道了，我们最近到山东高密这个地方还有剪纸，还有河北蔚县的剪纸，还有泥塑，还有年画，这些大部分都是在农村地区发展起来的。河南大学有老师一直在做这方面的研究，他们叫做农村特色产业区。河南现在还有一些，他们有一个课题研究当前农村的一些文化产业业区。这样的一些区我觉得是现在很多工业化，处于工业化初期阶段的一些集群的，好像是它们的，比它们更早一些的现象。但是也不完全是，它们可能是永远存在的，不一定说就会变成工业化了，不一定会发展成现代工业。这样的一些集群，它那个地方是有艺人，老的艺人，有老的手工艺，有 touch knowledge, 有包含经验为知识的交流。我倒是没有把它和现在很多的产业集群完全联系起来。但是我觉得那一方面要挖掘中国文化艺术的传统，使它能够在国际市场上或国内市场上发挥经济的作用。这方面应该是很重要的。

Jane: 我这次有发现国内开始有一个商标叫非物质文化遗产。

王: 对！对！对！

Jane: 它好像成为旅游业的一个亮点，像厦门有中华老字号，中国非物质文化遗产，这方面它就会刺激消费。

王: 我是很喜欢这一类东西的。

Jane: 就你看来，你也去过很多就是有传统文化产业的地区，就像你讲的山东那个地方。您认为传统产业当中有哪些特点在现代当中没有很好保存或者流失的？

王: 我看到。我常常想到小的时候的玩具。就比如现在常常在电视上看到的北京的庙会的像空竹，玩空竹，还有就是踩高跷，还有陀螺，这些东西都是我小时候玩过的，但是现在都失传了，很多人都完全不知道了。很多年轻人都完全不知道了。我觉得这些传统的有文化内涵的产品都应该恢复起来，都是非常值得发扬的。

Jane: 根据您来看，就是现在中国的集群当中，有哪些特质就是让它们很成功的？就是中国有哪些成功的集群的案例，它们有什么特质？
王：中国有一些集群我认为是很成功的。像温州的服装业，我现在说不上它到底有多少企业。总而言之像美特斯邦威，还有那个报喜鸟。美特斯邦威，它叫作美邦品牌，它前几天上市了。温州还有一家企业叫腾旭，是温州一个女企业家叫徐云旭创办的，现在也为意大利的企业作设计。温州为什么会出现像美特斯邦威或腾旭这样的企业呢，我觉得它是在很多的企业，配套企业，很多的服装的企业竞争发展起来的。而且温州的服装协会很强大，我昨天在网上看到它开始要投资1000-2000万建服装研发设计中心，好像是在北京或者是在当地。我觉得像这种情况就是说它的服装产业集群就是比较成功。

Jane：因为他们已经有自己的研发中心。

王：对，对！他们有自己的研发中心，而且还有协会很强大。温州的皮鞋业也是很不错的。它现在已经出现了很多的品牌，像奥康，还有康奈，红蜻蜓，好多的。另外福建泉州的服装，像七匹狼。这些都是在改革开放以来当地有大量的配套企业的基础上发展起来的。

Jane：那您可不可以简要的来概括一下这些案例它们主要的几个特点。

王：它的特点首先是他们有很强大的行业协会。当地本行业有一些比较大的龙头企业牵头成立的这些行业协会。这些行业协会呢，可以经常和组织企业的一些活动，和政府一起组织活动，比如说当地的一些展销会，还有各种各样的论坛，还有就是带着企业去参观甚至到国外去参观、学习经验。另外就是本地有专业的学校，像东莞就有鞋业学校，培训这些方面都很发达。另外一个就是中国的这些产业集群的一个很重要的特点就是专业的市场。到处都有这样的专业市场，像鞋业有专业的市场，鞋料、鞋革在当地都可以解决。当然关于专业市场现在研究得很多了。还有很多当前问题值得研究。另外就是政府的支持。首先是政府在一般这些地方就是改革开放做得比较好的，就是本地有政府比较宽松的环境，然后就是有很多的企业创业。也就是说市场环境比较好。在凡是没有集群的地方，或者是经济落后的地方，一般就是市场条件不好的，政府计划经济痕迹很明显的一些地方，所以政府是怎样一个角色是重要的。在一些集群发展比较好的地方就是政府能够积极地配合行业协会做很多很多的工作，甚至投资建专业市场，或者做一些基础设施的建设服务。还有就是有政策方面的支持，对中小企业有政策方面的支持。还有一个特点是跟刚才有关的就是有企业家。就是本地有能人，有企业家，能够自己去搞钱，去融资的能力。基本上就是这样一些。所以在这样的情况下，本地的企业就可以共同进入国内和国际市场。有时候在国际上遇到反倾销，当地也可以应对。

Jane：讲到政府，在我的观察看来就是政府的作用在东方跟在西方好像有点差别是不是？

王：是的。在中国政府作用很大。

Jane：我也发现这一点。我发现这跟文化性有关。西方可能可能个人主义比较强一点，政府在实施、落实一些方案或者是计划的时候好像有点推不动的感觉。在中国这样的问题好像不太大，是不是？

王：对。在中国尤其是地方政府起了很重要的作用。你从奥运来看你就可以知道政府就是，老百姓的话就是政府想干什么就能干成什么。

7.4.1.3.2 2 Interview 09 September, 2008 Ping Chen

采访手记 2_20080909

姓名：陈平

年龄：28

教育背景：博士在读研究生
研究方向与兴趣：在全球价值链下的劳动地域分工，中国的产业集群

职业：学生

Jane：你现在接触集群有一段时间，你对于现在中国的集群发展有什么看法？

陈：集群的发展看法的话，我想因为从集群发展最初的研究包括 Porter 的概念引申过来的，还是 Marshall 的新产业区这一块，对中国来说呢，实际上这种情况，我的最大的看法可能是跟传统的那种不太一样。中国的集群它有一个自身的特殊性。像譬如 Porter 强调的，他主要是创新性。集群就是一个优势，可以带来创新。从中国来说呢，中国的集群产生呢实际上跟国际上的产业转移相关联的。像发达国家它把加工阿、生产制造的环节从本国转移到中国。然后在中国的沿海地区跟本地所谓的区位优势结合在一起。比方说它的劳动力便宜阿，土地便宜阿，靠近市场又靠近原料供应地阿，很有可能形成集群。在这个集群它主要是一个起的作用主要就是降低它的成本。所以这是一种类型。另外一种呢，我刚才为什么说是对于创新的它不是那么强呢，主要是偏重于降低成本，不是说是做更复杂的事情，关注于产品设计啊，关注于创新阿。另外一点呢，就是中国本地，地方的集群阿，通过这种本地发展起来的。往往是民营企业。刚才所说前一个例子主要代表就是珠三角。主要是由外商投资带动起来的地方集群。你可能比较了解台商在东莞。现在东莞许多地方的集群主要是台企。另外一类呢，就是民营企业家发展起来的，像浙江温州，包括福建的石狮、晋江这些运动鞋，包括石狮的服装。这些发展起来的它主要是靠本地的力量。我们现在讲的本地的力量呢，它在那个集群的发展当中，实际上它也是受这个参与到这个全球价值链。首先是参与全球价值链的过程，因为它的主要产品是与出口为主。然后呢，在这个过程当中呢这个集群形成的因素，它可能有这些本地的因素。我刚才也说了，它有企业家的创业精神啊，包括当地经商，营商的氛围啊，它们当地有一些区位优势，土地啊，劳动力啊，这些都比较便宜。主要分成这两类，一种是外商的，一种是本地企业家。

Jane：你觉得现在的学者是否更注重于产业集群它的现代化发展，还是说很多的学者他们已经注意到集群发展它本身的根源性问题？

陈：现在的学者主要是研究集群和区域发展结合在一起。因为在中国呢，有一个很明显的一个特征，可能跟其它国家不一样，就是很多情况下政府主导的地域发展。在这个过程当中，政府的作用是非常重要的。所以政府要制定地方的发展规划去指导某一个行业，甚至是某一个大的企业的发展，这都有可能的。所以在现在这个集群的研究过程当中，尤其重要的一个问题就是，集群怎么去跟区域发展结合在一起，怎么样带动地方经济发展。所以在这个过程当中，包括对集群现代化的研究，包括集群如何升级阿，产业结构怎样调整阿，怎么去创造一个 creative 的环境阿，这些都是尤其是集群研究所关注的，因为我们国家的这套体系呢，不管是研究体系也好，还是地方政府体系，其实上就是政府主导。学者是为了地方政府，地方区域发展来服务。

Jane：那你是否觉得说关于产业集群的研究就是从传统产业的文化产业或者是传统文化产业的研究是否能推动现代化工业集群的发展呢？你有没有考虑过类似这样的问题？

陈：当然了，我觉得呢现在对集群的研究来说，我们恰恰忽略了这一块。像我们在以前说集群尤其是 Krugman 的经济地理，他说在集群产生背景有一个重要的原因就是路径依赖 path-interdependent，路径依赖从他的理解来说他强调一个规模经济。我这个地方的产业发展达到规模经济以后，我有一种网络效应可以连续发展。可以在死后形成一种路径依赖。但是我觉得呢，这个路径依赖跟地方文化传统非常相关。因为温州举个例子，温州的产业集群为什么可以发展得那么快，那么好，当然它推动地方经济的作用也非常明显。重要的一个原
因就是温州人的文化传统。温州人的创业精神非常的强，在全世界各个地方去经商。这个形成他们这个文化传统肯定在于一个传统文化的影响。然后，另外呢就是一个集群的产生发展。有一类呢，它是改革开放以后，它接受外商投资，本地开放程度加强以后，它可以吸收外国的FDI到本地来集聚的。另外一种就是在中国传统文化的基础上，比方说它在解放前都有，甚至在清代、明代都有一直发展到现代。景德镇的历史就是这个。

Jane: 你可不可以预测一下传统文化集群可以从几个方面去帮助现代集群的发展？

陈：我们现在知道人文地理学，现在讲的就是文化转向。因为我们现在讲的很多的，不管是区域经济的发展还是某一类的现象也好，其实它有很强的文化的背景。我们到最后，最终的源头在哪里，是文化。这是一个非常重要的因素。这样像从美国的Yufu Duan他讲的，现在也影响大陆的学者，就是这种文化的因素越来越强调。这一点，就是在现在的研究过程中强调文化这是非常重要的。另外呢，文化因素传统文化的因素怎么去影响现代的产业集群，跟现代产业集群相结合，有一点，就是说探寻这个集群发展最原始的动力。因为这个集群有很多类别的，我们可以分成很多很多种，像刚才我告诉你的有通过这种FDI，外商投资，还有一种就是通过本地企业家，他的这个创业精神结合当地资源，生产要素。那为什么说跟传统文化产业结合呢，就是说在本地生产要素基础上形成的产业集群。它的一些产业集群肯定跟传统文化是密切相关的。这是一方面，就是探寻集群发展原始的初始动力。这是研究传统文化集群很强的一点。另外呢，传统文化对于产业集群来说，因为我们都在讲民族的就是世界的。文化的这种概念在我们全球化的背景当中，在二十世纪后段，80、90年代，我们觉得全球化会带来一种危机，会消灭我们的文化。但现在经过十几年的发展来看，这种文化的东西，民族的东西在全球化背景底下是更被重视，更被发展起来。因为我们强调一种多样性的发展，所以这种文化的东西在全球化的发展当中，我觉得它以后的发展会越来越强调这种方面。就是说这种传统文化的东西，民族的东西我们现在强调的在哪里，它的创意性。比方说我们知道现在这个产品的附加值越高，对于一个产业的发展越好。我们判断这个船业，尤其是中国的产业集群它只是制造的环节，赚一点加工费。那我们觉得它是没有竞争性的，或竞争力很薄弱。但是随着产品附加值的提高，它的竞争力会越来越强。所以这种传统文化的因素可以放在附加值里。另外呢，我觉得传统文化对这个产业集群实际上是一种，我刚才路上已经讲了一个是路径依赖(path-interdependent)，另外一个就是地方根植性。实际上这种地方嵌入性，或者地方根植性，在英文都是Embedded,中文里头它翻译成了两种，一是嵌入性，一是根植性。然后我们中国的学者还觉得这两个还不一样。你可以看一下中山大学邱海琼的文章。他有讲这两个概念还不一样。然后就是说我们现在强调的地方根植性也好，地方嵌入性也好，实际上是一个文化背景下。地方根植性，地方嵌入性讲的就是一种文化因素。这种强调是非常重要的。还强调一种网络因素，社会网络啊，非贸易的，这种网络当中传统文化是非常重要的。比方说中国人很讲究的就是仁志礼仪信，尤其是这种最初在社会网络当中，信任的这种关系是非常重要的。我可以借钱给你，因为我信任你啊，我们都是同乡阿，都是同族阿，这个关系都非常重要的。还有一些像仁志礼仪信，就是中国传统的，还有就是一些儒家文化，非常多。

Jane: 那你现在就在研究集群，在你的接触当中有哪些集群算是成功的集群。

陈：成功的集群，我们看它的历史发展的过程，有可能现在很成功，但未来的发展它没有竞争力。或者是某一天它的优势因素丧失的话，那也就不成功了。这个没有绝对。现在发展的非常好的集群，它未来的话可能会消亡啊。集群也是有生命周期的呀，对不对。它也会产业转移，今天在这个里面明天就走了。这都是可能的。

Jane: 也有一些集群的发展一直都是算是很强的，就像那天王老师讲的就是温州的服装业。
它有具备某些特质可以使他的集群可以继续性的进步，可以体现出它的成功的特质。你会觉得有哪些因素对你判断哪些是成功的集群有帮助？

陈：这种阿，我觉得还是一种地方氛围。就是当地的企业家，或者企业家精神，它具有不断创新的精神。它会去做一些高风险，它有这种冒险的精神。就是要去判断它的这种企业家精神。如果当地大家都不想去创业了，都想坐享其成那就会发展不好。就是说人的因素在集群发展中最重要的。

Jane：在讲到就是创新性的时候，其实有很多传统的东西，它本身就是一种创新。

陈：对！创新是什么呢？我们现在讲的创新阿有一种改进型的创新，比如我这个东西修修补补阿，让它更好用，更方便啊。还有一种就是颠覆性创新。就是熊彼德（English name）的那个创新理论。就是我突然发明一个东西把以前的东西全代替了。就像我们现在的液晶显示器把普通的那个CRT显示器都代替了，这就是一种颠覆性的。你说的那个传统的东西对创新的影响我们要区分。它是在一种改进还是一种颠覆性。实际上呢在这种颠覆性它其实没有那么高的价值。

Jane：你说颠覆型的没有那么大的价值。

陈：传统的在颠覆性的创新上，价值不是特别大。比方说我们这个沙发已经用了几百年了，但沙发的样式可能在不断的变化，但突然今天就发现一个古董的，就是把中国的传统的一个文化，或者传统元素放在里面，我们会觉得非常好。不可能说我有中国传统文化的东西，我们设计一种新的东西不叫沙发了，我觉得那种东西更舒服。可能也有人觉得日本的榻榻米他们觉得坐在榻榻米上比沙发更舒服。也有可能。你就是要分清这个传统文化对创新的影响来说，不是说传统文化的东西，它肯定有利创新，这种说法是不成立的。就像我们说要突出传统文化产业的东西在什么地方，比方说陶瓷，你研究这个产业比较特殊。陶瓷我们中国搞了几千年了。

Jane：两千两百年。

陈：然后就那个新石器时代，那时候灰陶黑陶。你说这么多年的陶瓷它的创新强调的是那种外形啊，设计阿，这个因素。

Jane：然后就是那个过程的创新。

陈：实际上陶瓷本身它的工艺没有变化。可能现在加入一些机器设备，它的过程更为简单。但是主要的几个工艺流程肯定没有变化。包括你这个原材料高岭土，没有变化，对不对？可能我们现在会加一些什么什么元素，让它看起来更……，所以它的创新强调在哪里，强调在它的设计，或者过程。我这个设计好了就可以卖很多钱。

Jane：在历史的过程当中，它有很多的创新还是，可能很多人对于颠覆性的理解还是不一样。像它的一些技术，烤瓷的技术阿，还有就是泥土加入的成分，不只是高岭。还有就是它在制胚有一些很决定性的技术性的更新。我觉得这些（创新）都是一些蛮大的。在历史的过程它不断的在创新。

陈：我觉得这怎么理解呢，就是你要研究创新与否，就要把一个产业摸透，知道是怎么一回事。比如说我们宋代的青瓷。宋代有四大官窑，或五大官窑。我们现在来说，这个青瓷的东西还是非常好。看起来还是非常好。你说宋代跟我们隔了一千多年，我们还觉得非常好。那你说明代包括景德镇这些，青花瓷，我们觉得青花瓷的东西非常好。那我们现在觉得欧洲的，波兰、德国的瓷器它也非常好，还有西班牙的。这个好不好与否，还是人的主观判断。
Jane: 你对景德镇有一些了解吗？

陈：一些了解。去年的时候我去过佛山，佛山有一个陶瓷产业非常好。去佛山做过一些调研。跟他们陶瓷协会的会长访谈过。但是景德镇那边我没去过。

Jane: 对陶瓷产业不管是景德镇或是佛山，你有没有发现他们有什么样的问题需要去面对？

陈：当然问题很多啦。现在景德镇的陶瓷产业，它已经落后了很多，它跟佛山比已经落后很多了。不管从产业的规模来说，还是产品的质量，或者产品的附加值来说，都比佛山差很多。但关键的问题就是佛山那边已经是世界的瓷都了。它的产量在世界算是比较高。那景德镇在不断地衰落。这是一个问题。它为什么衰落，我们现在知道解决它的问题去。它的优势是不是正在丧失？我们研究它的产业发展，产业发展有不同的优势。它的这些优势因素是不是没了。或者是消亡了。这个需要调研。所以说找到它的问题了。比方我们以前将，景德镇的瓷做得中国最好，不管是工艺也好，设计什么都好。现在不行了阿，现在佛山比它做得比它好。就是说它的这个设计优势已经丧失了，被别人给替代了。

Jane: 我研究景德镇最大的兴趣是在于它的生命周期Life cycle。它的生命链算是比较完整的，比较长的。因为Porter在引用一些事例的时候，它最久的就是维也纳的造船业。大概有400年，但是景德镇的生命周期Life cycle算是比较完整的。就觉得蛮有价值去探索的。因为现在很多的研究都是处于集群的初期研究Agglomeration那样子的研究，所以我会对这方面有兴趣这样子。

陈：那你需要把文献资料找全。这个有困难吗？

Jane: 去景德镇那边在继续找。现在已经有一部分。

陈：需要找一些陶瓷的“志”，中国阿讲“志”，县志阿，尤其行业也有行业的志。地方志不是现在的地志而是过去的地方志。清代的，明代的。就是找景德镇的，或者景德镇管辖的知府，那个州阿，那个志。其实很奇怪，我们这个陶瓷阿，你像宋代的四大官窑，也没有景德镇对不对？从唐代来说，唐三彩在洛阳。后来再宋代四大官窑。到了明代它到了景德镇那边。为什么会转移这些都是需要回答的。

Jane: 其实有很多都是政府的因素。它有一些机遇opportunity，还有政治中心的转移，对它的影响满大的。那可不可以谈谈你现在自己的研究？

陈：我现在做得主要是全国的地域分工，然后试图回答一下，我们现在知道有全球价值链，不能形成一种国内价值链。这通过国内本身各种力量，尤其是一种市场的力量，形成一种国内的价值链。我现在通过以鞋业为例，通过不同地方的企业。我不知道你对鞋业不知道了不了解。因为我们国内这个鞋业的分布非常广泛。你像温州它主要做皮鞋。福建的晋江它主要做运动鞋。然后广东的东莞，它什么都有，比较综合，有皮鞋，也有运动鞋，也有凉鞋，都有。然后像广东的揭阳阿，……这种地方主要做塑料拖鞋。像成都阿，成都的……，它主要做女鞋。然后还有很多阿，青岛那边也是主要做女鞋的。山东的高密，主要做劳保鞋，像油田工人穿的鞋，下煤矿工人穿的鞋。像河北的衡水那个地方，普通的布鞋阿。布鞋也有很多地方在做。就说，每一个地方做的鞋都可以形成产品链的分工。每个地方做得形成产品链的差别，为什么会形成这种产品的分工。回答这个问题。回答这些在一个全国的背景下。因为没一个地方生产企业的地方都会形成配套环境。它的这个鞋的配套环境，像鞋面的这些材料，真皮阿，牛皮阿，羊皮阿，还有各种革，还有后跟阿，鞋的这种胶底，还有塑料底阿，鞋跟阿，鞋扣阿，鞋带阿，各种鞋的原材料，它每个地方都有一个系统，在整个全国背景下是一个怎样的情况。
Jane: 那你接触的，你会接触到不同地方的产业集群，都是围绕着同一个主题。那么在这些集群的当中有哪些你会觉得是比较突出的集群？

陈：突出的集群像东莞那边做鞋的，后街那个做鞋的。它的萌芽跟内部就是台资的。就是说台资的鞋厂，它在这方面，最开始是在台湾，迁到大陆，到东莞。东莞那边不断的衍生、扩大。东莞那边鞋的产量非常大。它在这个集群的形成过程中，台商是非常重要的，一个是跟它的形成有关，在发展的过程中，它起了非常重要的作用。每一个鞋的生产链上，包括鞋机等，鞋的化工产品，鞋跟等，每一个鞋的原材料。台资都占有非常重要的作用。然后在这种鞋的销售过程中，台资的贸易公司，也起了非常重要的作用。台资在产业集群的发展，尤其是东莞那个地方的，它的这种角色怎么去定义，是不是一种新的模式，这种模式在别的地方有没有。都是值得我们去关注的。

7.4.1.3.3 3 Interview 10 September, 2008 Pengfei Li

Interview 3 20080910

姓名：李鹏飞

年龄：24

教育背景：硕士研究生

研究兴趣：沿海地区的企业最近这几年受到各方面的一些成本的影响向内地或东南亚国家迁移，产业转移是一个兴趣。还有一个就是集群的衍化，它刚刚开始发展到现在，经过了不同的阶段，然后这样一个历程的研究。

职业：学生

Jane: 请问一下你对于产业集群的研究现状有何看法？

李：中国的集群的话从国外引进来到现在已经十几年了。所以现在研究的人很多，也来自于不同的学科。不光有地理学的，还有管理学，还有经济学的。比起国外的研究实地的调研不是很足，所以说现在的研究还有很大的空间。中国的集群和西方的集群由于社会还是经济这样一个背景差别特别大，所以中国的集群肯定有一些独特的东西，值得去挖掘，值得去研究。但我们现在还在探索中。

Jane: 所以当前的学者，你说它的研究的队伍很大，那他们是不是更注重于集群现代化的发展，还是说更注重它的历史起源？

李：我觉得国内现在集群研究的文献还不是很多。总体的一个感觉就是问题的解决。一些理论方面的探讨还不是很多。就是以实际应用为导向。

Jane: 你的意思是拿现成的理论来实际运用吗？

李：可以这么说，但是也有很多是没有理论，就问题论问题。就是说集群现在有什么问题，然后大家就来讨论有什么问题，怎样去解决。就是很实用的一种态度，一种导向。

Jane: 然后不知道你对于传统文化产业集群有多少了解。

李：文化产业集群倒不是很多。北京这边倒是有一些，像那边798，不知道你去过没有。还
有一些，我们小组的话之前有师姐她们做过一些文化集群。譬如有个师姐做过去画家村的那方面的研究，做过一些。

Jane: 那你觉得这一类型关于传统文化集群的研究是否能推动现代化产业集群的研究，或者是影响？

李: 对于这种文化产业集群的研究对中国的这样一个发展或者现在这样一个现代化进程有没有一些推动因素。肯定有啊，我觉得肯定有。像很多原来是纯粹制造的话，现在由于各方面因素的影响，像成本提高，劳动力、土地成本上升阿，很多原来低成本的优势，慢慢地在削弱。有些像我们小组有一个师兄，他是台湾动漫产业的公司的老总。他就说很多中国的这些产业走产品文化化。就是在往文化的方向转。提升产品的文化内涵，提升附加值。我觉得是一个发展的方向。但也要看产业，不同的产业有不同的侧重。

Jane: 那你可不可以想到从哪些角度传统文化产业可以帮助到现代化（集群的发展的），你刚才也有讲到就是提高它的文化附加值。还有其它方面可以想到吗？

李: 你是说文化产业对于整个其它的？还有一些就是，举个例子就是我们前一段时间到山东潍坊去调研，就是中国有很多传统的手艺，就像你做的这种景德镇研究吧。传统的产业，就是这种历代相传的手艺，你可以去挖掘这种手艺，怎样去把它推向市场。市场化的运作方式，复兴传统的工艺。这是一个很重要的一个方面。

Jane: 那么我想可不可以让你来谈一下你个人研究的方向。

李: 我刚才提到一个就是产业转移，一个就是集群的衍化。从去年到现在一直在关注中国的铝型材产业。铝型材产业的话主要也是在广东那边，南海的铝型材还是比较多的。我们从去年调研到现在，觉得他们整个发展的话，可能和中国其它地区的发展有相似的背景。就是从改革开放到现在，改革开放是它们发展最早的时期，一直到现在。他们这种产业的发展离不开它们历史的背景。在中国刚刚改革开放的时候，九十年代的初期，这个经济是处在一个卖方市场的，你做出来的产品就是有人会买。处在一个这样背景下，南海那边的小企业就是那些企业家他们觉得，看这种铝型材，原来香港那边做，他们觉得他们也可以做。因为市场有这种需求，他们就在这样一个市场需求的导向下发展起来的。但是很多像现代的这种，比方像这几年的经济形势的话和原来就是差别特别大。现在就不是当时那种环境了。所以说很多的地区它要再去发展的话，去打造一个集群的话，已经没有那种历史背景了。通过我们的调研，那些铝型材发展它是有一个特殊的历史背景的。在那样一个历史背景下发展起来的。那种历史背景已经过去了，所以现在我们再去模仿南海那边的铝型材或者其它产业这样一个发展的话，我觉得基本上很难，不可能去模仿。因为历史已经过去了，它不可能再（重演）。

Jane: 或者像 Porter 讲的那个机遇 Opportunity。

李: Porter 讲的那个机遇的话，我觉得太宽泛了。你说机遇的话，你可以说当时的话有机遇，现在没有。也很难把那样的一种历史归做一种机遇。当时的话，当时的历史条件的话，确实是一种很多的机遇。但你也不能说现在的机遇都没有了。当时的话是那种传统产业，那种企业家的话，他只要能够做出产品的话他就能发展起来。现在的话，不是说没有机遇，而是说要求不一样了。这种网络，很多的这种企业家通过这种网上买卖，他也可以发展起来，他也可以发展得很好。不同的历史阶段有不同的机遇。但那种机遇已经过去了，现在的话不是说没有机遇，是有机遇，但现在的这种机遇已经有别于之前了。你用南海那边九十年代有经验，用他们那种经验在现在去发展也是很难成功。因为历史条件不一样，但不是说现在没有机遇了，而是说机遇变了。我觉得可能是这样。
Jane: 你是说某些历史因素是不可重复，不可模仿的？

李：对！对！所以就是在经济地理学里，有一个潮流就是说很多地方的这种现象，不可能摆脱它的大的历史背景。所以说你如果要了解地方的这样的发展，不可能抛开大背景去谈地方的发展。就是要把这种大的背景放在地方的背景下考虑。中国的话，最起码从这个铝型材方面，这种看法是很准确的，很恰当的，很中肯的。

Jane: 那你也接触过不少的集群的。

李：但很多就是，谈到其它产业的话很多就是蜻蜓点水的那样的了解，不是了解得很深入。

Jane: 没有关系，我觉得接触的多你会形成一种洞察力。比如你觉得某些集群它很成功。

李：我觉得深圳那边就非常的成功。就是它有一种氛围。也可能是它在历史形成的，但一直保留到现在，他这种氛围的话是很好的。但其它地方的话就觉得欠缺一点。

Jane: 所谓的氛围你可以讲得具体一点吗？

李：其实我觉得我们也是很难去描述。就是说我们去调研的话，深圳那边的话每年都有很多的小企业去产生，每年肯定也会死掉一大批。每年的话它可能会产生一些不是很多小企业它发展得很好，它治理结构也很好，它的发展速度也很好，它的这个产品和市场定位的话都很好。就是这些有潜力的小企业的话它每年不断地冒出来。就是它为什么会冒出来，我也一直想了解。为什么深圳这个地方会冒出这么多好的一些小企业，有很大发展潜力的小企业。我们也很困惑。但从这样一个现象，最起码能看出深圳那边，它有这种氛围。

Jane: 就像 Marshall 他有讲过商业氛围 Atmosphere，他说 business atmosphere 是很重要的。

李：但是具体地去描述它，真的就是，你知道氛围就是无颜无形的，就是只能去感觉。

Jane: 它是动态的那种。

李：对对，我觉得很难去捕捉到。但深圳那边确实是不一样的。

Jane: 你是说你一进去到那个集群里面，你就感觉到不一样？

李：不是。像我们吧，如果我们不是从事某个行业在深圳呆了很长时间的人，去调研一个星期或一个月的话，可能也感觉不到。就是他们那种真正本地的，真正了解这个行业的人可能他们才能真正感受到。我们的话不一定能感觉得到。反正，我没有直接感觉到。只是听他们企业家这样说的。

Jane: 那你从什么途径来感觉到它的氛围？

李：就是访谈的时候有一些企业家，他们通过访谈他们可能会有一种流露，本地的话有这样一种氛围。我们也是透过他们间接的来了解到。我不知道其他人怎样，我的反应比较慢。反正，我没有直接感觉到。只是听他们企业家这样说的。

Jane: 除了氛围以外，你从这一些比较成功的集群当中，可以看到他们有什么其它的特质？

李：其它的特质阿。一方面肯定就是一批企业家，他们就像硅谷那样，敢于冒险的话，的那种企业家，企业家精神。一批的企业家。还有一个我觉得很重要的就是地方的政府。地方政府特别是在早期。有很多的政府的话在早期这个推动作用是特别强的。不像西方很多文献所讲到的集群很多是自发的成长。那么在中国的话，至少我们调研过的集群，早期的话，地方政府的推动作用是很明显的。
Jane: 我们可不可以讲说深圳那时候的地方政策就是（很好）

李：大环境的话，肯定就是很重要的因素。但也很难说，它是最重的，或是唯一的。它靠着香港，这种地缘上的关系也是很重要的因素。很多这种企业的话，都是学习香港的企业，它才发展起来。

Jane: 那在你研究铝型材当中，南海的铝型材算是比较成功的案例。

李：相对来讲是比较成功的。他们現在有这种很多的本地发展起来的大企业，比方像亚洲铝业。已经有一些比较大的企业，有很多这样的企业已经上市了。有很多企业把总部已经迁到香港去了。它已经做得不是管理，产品已经慢慢地朝跨国公司的方向去长。像很多的企业它已经去很多地方去建分厂，还有在不同的地方，它有不同的企业有不同的工厂。我觉得它是一个正在向一个比较好的方向在发展。

Jane: 你刚才提到有一点我觉得很有兴趣，就是说中国研究集群的人很多。

李：因为中国人很多。

Jane: 因为其实王老师她也有谈过研究集群的人，中国研究集群的人在世界上算是最强大的队伍。

李：人很多，但是集群研究里的在中国的这样一个地位还是很低的。但可能有一个阶段吧。可能有语言上的因素。比较好的企管都是用英文写的。假王老师那一辈的，还有再早一点的。他们由于历史的影响，他们可能英语不是学的很好。这是一个制约的因素。他们在自己最好的时候，不是做自己专业的，也不是学英语或者干嘛的。因为他们已经老了嘛，也很难再去改变。

Jane: 我反而觉得做中国传统产业的研究，你看太多西方的理论，不一定是很好的事情。

李：最起码要了解在集群研究里的话，大家都在讨论什么主题。你可能说中国这边有特殊的地方，可能和你的不一样。但你最起码要了解国外的一个怎样的情况，然后你中国对国外的这种研究可能是一种颠覆，一种挑战。但你要，最重要的是要说出它为什么是一种挑战。你要了解中国的，也要了解国外的。

Jane: 其实我为什么要研究景德镇陶瓷其实是有一点小野心，想要有一点颠覆。因为我觉得说西方理论在中国现实情况下，你要直接运用呢，那是不现实的。因为这个理论的根基的文化背景不一样。

李：对啊，对啊！我觉得不能说野心。中国人去研究中国的这种现象的话，肯定要根植于本地的这种文化。跟那个中国的特色去研究。这才是脚踏实地的研究。

Jane: 现在讲的比较多的是 cluster innovation, innovation cluster, 然后 competitiveness, 之类就是讲的比较多。讲到最后好像中国没有创新了。就觉得意大利的才叫做创新。

李：像很多产业里的，很多企业的话是他们的优势还是低成本的优势。但是肯定是一个阶段的。像日本和韩国，他们也都是通过这样一个阶段。包括香港那边都是一样的。所以是一个阶段的，集群为什么从这种低成本的优势转化到依靠创新的这种优势，这种过程是怎样实现的。应该是有非常重要的意义的。

Jane: 我觉得不是说中国没有，但是从某一个角度上讲的确是指它从低成本到附加值比较高，它添加了创新的元素。但是我觉得创新也不仅仅是这一个方面的创新。像中国的美食，中国
的食物，它本身就具有创新性。还有中国很多传统文化的东西是很有个性，很有创新性的。

李：很多手艺的话，都是这样的。

Jane：我比较纳闷，当你讲到创新的时候，到底什么是创新。是不是必须得脱离初级阶段，进入高级阶段才叫做创新。还是说从比较低层次的就有创新。

李：也有很多中国的产业它创新很多，但它产业的控制权是在国外的。品牌的话是在国外的。比方说你的企业可能有很多的创新，但是真正的产业的剩余价值索取权的话是被国外所掌控的。权利结构的话，也是一个很重要的角度。经济地理也有一些探讨。

Jane：当然是讲到某一部分的外资企业，它的 R&D Centre 不会直接设在中国。比方说我的老师有研究汽车。有很多在中国设厂，但在中国的流水线都不是最发达的。比方说日本的一些公司，它在中国设的厂他的机器设备都不是最先进的。是落后好几代的。

李：对阿，这是个问题。

7.4.1.3.4 4 Interview 11 September, 2008 Xintong

Interview 4 20080911
姓名：童昕
年龄：33
教育背景：北京大学从本科一直到博士
研究兴趣：工业地理中的环境保护
职位/工作：经济地理系副教授

Jane：我想请问一下，你们在中国研究集群，你觉得中国集群的现状是怎么样的？
童：我认为中国集群可能是经过了比较快速发展的阶段。目前普遍的感觉来说可能是遇到了一个发展的瓶颈，危机比较明显的一个阶段。尽管如此，我认为它未来发展的潜力依然很乐观。

Jane：那现在从业的人数是怎样的呢？
童：你如果是问产业集群的从业人数的话是很难定义。首先取决于你怎样定义产业集群。什么样的地方，什么样的产业可以算是产业集群。或者你问普通行业，差别也很大。普通地区差别也很大。所以我觉得这个问题很难回答。

Jane：那你所接触的集群的当中，你有没有接触一些你认为比较成功的产业集群？
童：我自己在过去的研究生从研究生开始主要集中在中国的电子信息制造业。所以我个人感到电子信息制造业在中国是一个相对比较成功的产业。那么这个产业当初在 80 年代中国刚开始改革开放，就是说进行市场开放比较早。所以政府确立为一种放开的产业。因为它本身的基础比较弱，市场保护的当下的动力不是很强。所以当时市场开发一个非常显著的一个结果就是经过十年以后的发展就是发现在这种弱保护的产业里它的这个发展方向，发展速度却远远超出国家保护意味比较强的产业。这是一种非常有趣的现象。另一个就是说它的电子信息是非常受益于全球化的。我们知道在过去三十年经济全球化，它在不同行业，不同地区发展是不均衡的。但是在电子业，它是一个非常突出的受益于全球化。受益于全球生产……不论是发达国家的市场，还是发展中国家的生产都非常受益于全球生产网路的快速增长。给这样一个新科技的发展创造了非常好的条件。那么在这样一个大的宏观的背景中国的电子信息制造业应该是得到了一个非常好的发展机会。不管是从地方生产者的学习，它的技术水平的提升，以及中国本地消费市场的成长，都表现出一种让世人瞩目的发展的一个条件吧。这是我印象比较深刻的，我长期以来关注时间比较长的一个产业。那么其他的话我想还有很多。还
有在国际上比较认可的各种劳动力集群的消费产品。这些呢大家会质疑它的技术含量不够高啊，还是中国的劳动者并没有从这当中获得很大受益。尽管存在这些质疑，这些产业的发展实际上还是给中国大量的就是在社会转移过程中农村劳动力转移提供了历史性的劳动岗位这个条件。所以我认为这也是，就我认为在过去三十年的改革，至少对这个改革是个非常正面的影响。这样的产业，王老师接触的非常多的。她的很多的学生做过服装、鞋业、家电。家电曾经被看作技术含量很高的，但现在越来越趋于一种成熟的技术产品，但我们并不排斥它有高端产品有科技含量，但从它整个产业来说，它是趋向于一种普通消费产品。还有就是像纺织、玩具等等，我想王老师一定跟你讲很多。

Jane: 你刚刚讲到说电子业在发展起来的时候，它是弱保护。那政府在这边的作用你觉得是怎样的？
童: 我觉得在电子业，尽管它在贸易、进出口上是个弱保护，相对于其它产业来说，关税阿，配额方面放开的比较早。但是政策在另一个方面在需求方面对它的发展起了一种很大的促进作用。中国比方说在大学、工业还有政府，还有银行，等等这些领域推动了这些信息化的项目，或者信息化的服务，我想这些都是创造一个需求。这些虽然市场保护不够，但是它创造了一个新的需求，在这个新的需求下，它不光给海外的产品，进口产品市场空间，也给国内生产者市场空间。而且它创造的一个市场，它给国内的生产者和国外的生产者一个合作的机会，因为它蛋糕在这里。生产者可以合作，国外的生产者有技术，国内的生产者更了解国内市场需求。那么它提出一个合作的桥梁，合作的机会。所以我觉得这确确实实通过这种需求来带动产业发展。应该说是蛮成功的。

Jane: 那你可否概括一下这个集群的特点，就是有几个特点。
童: 我认为它首先在地域上形成了几个比较明显的集中，比方说在南中国的珠三角阿，长三角阿，京津这一带。很明显的集聚，这就是典型的产业集群的特点。它分工细腻，而且从整体上规模也相当大。不管国内，还是国外市场份额都是相当突出的，它的市场份额显。再有一个特点，就是很直观的，再有一个就是全球价值链分工的一个特点。它有一个地理性的分工。珠三角的话，它可能就是出口，它和其他消费品很像的就是出口导向。长三角一带可能比较混合一点。它既出口，它同时也对国内市场也是非常好的区位。那么在京京这一带，相对来说就是国内需求的主导性更强一些。看上去它是一种地域分工，但同是他们之间的联系也很强。比方说很多企业在北京有市场有研发，它在广东深有生产基地。它有可能在上海也有生产基地。台资的话它可能两边都设厂。这种分工阿，合作的模式在业界也是很有目的的。它在投资在寻找合作伙伴的话，它也会到一些集群去，很有目的性的区走。所以我觉得这确实是它比较明显的特点。

Jane: 那我想请问一下，就是当前研究集群这一块的学者是比较注重集群现代化发展，还是比较注重集群根源的探索？
童: 我觉得现在在这一两年吧，国内研究集群的人非常多。我觉得这两种都有。对历史传统，我个人觉得还是与产业不同有关。比方说像电子业这种行业，它的历史传统你很难去挖掘。但像纺织品，像服装设计，可能王老师有跟你谈过，他们的确有非常强的历史传统。像宁波的西服，它历史上就有奉化裁缝的传统在。这些裁缝都是到上海去做西装。就是上海开埠的时候。它就是有历史传统，那么改革开放以后，西装这个市场很明显的就复兴起来了。所以传统产业里确有这个文化的因素还挺强的。所以就跟你研究的产业有很大的关系。

Jane: 那你觉得对传统文化集群发展研究是否可以帮会助现代化集群的发展，可以从哪几个方面来帮助它？
童: 我觉得这可能也要以几个不同的产业来说，比方说本身有传统特色的产业，比方说江浙一带它有丝纺产业。丝纺产业原来是江浙出口的大户，计划经济时代就是，但是相对于，一般的轻纺，普通的纺织产品是在改革开放以后成长更快。曾经有一段时间就对丝绸产业有冲
击。主要的原因是由于丝绸不同的机制阿，管理体制阿还比较传统，比较僵化。但是我们看，实际上我们换一个概念来考虑发现当这个传统产业出口，尤其是这个轻加工出口，它到了一个产业升级的环节的时候就会发现当它往高端走的时候，它的文化价值的魅力还是非常强。就是说，衣服穿在身上，舒服是一个方面，流行是一个方面，但是其中的品味，就是说它不管消费者也好，设计者也好，它有一个Taste，这个Taste它对于异文化，另一个文化元素，它有一个猎奇心理。猎奇心理就是它要和它越不同越好。而这个不同来源于文化渊源的不同。那么同文化，同一种文化的话就有从历史传承下来对这个东西好坏的评判，比方说这种丝绸，不要说古人了，就说三四十年代的老一代人，他们对丝绸就有非常讲究的，怎么样挑选、色泽、品质、怎么样绣花、绣工，还有怎么样的剪裁，这种衣服怎样收拾，怎么样储存，怎样洗。一件旗袍可以放几十年，拿出来还是非常好。它有一套你说文化也好，你说生活方式也好，它就有一套围绕你的品味隐藏在生活中的东西。当你说这种东西怎么和现代化结合的时候，就存在一个很大的问题。就说这个现代化，衣服我每年都换，它-fashion本身，它对流行、对时尚的追求更多。在价值体现在那一部分更多。它可能并不看重我衣服做得怎么样，还有我这衣服怎样保存得越好。我的衣服怎样可以品味就是经历时间考验的这种品味啊，它可能就淡化了。很多文化在新的世纪里它可能只是一种符号。它给人一种东方的感觉，或者给人一种复古的感觉。所以这种东西就和原来传统文化追求的那种品质，那种价值就不一样了。但是我们现在在强调文化的时候就是很泛泛而谈。就是说我去保留文化，但是你现在的生活已经不是那样子的生活了。你怎么可能去保留刚才我们讲的那种文化。一个女孩子在她出嫁的时候做的一套旗袍，她要年年日日的保存，每年拿出来穿，穿了又放回去，放在箱子里，用樟木箱子里存下来。可能没有这样的生活方式了。所以我觉得这个东西是一个困境。所有中国含有传统文化含义的这些所谓的老产业集群所面临的一个困境。

Jane: 我觉得如果从文化体现出来的外显特性来讲的话，它会遇到你讲的那种困难，因为已经时代不同了，它在practice的时候已经不是那种样子了。我在想说这些古老的集群们在整个发展过程当中，我觉得它们会有一些特点可以值得去研究的，比方说它们集群在发展过程中当它是怎么样子升级的，就是它怎样一步一步升级的。那它这些可不可以对现代集群有一些帮助。

童: 我觉得你说的这个产业集群升级，我们实际上知道升级就是扩大它的价值含量。所以我们要考虑谁在购买这些东西。我们要考虑这种市场价值细分的，那买贵的在任何一个市场都是少的，是呈金字塔形的。大众市场就是量大，所谓就是有高支付力价值的市场的规模小。那么中国的市场它在进入全球价值链的时候是由低端进入，先满足这个大众要求。不是国外的购买力比我们强，所以它们的大众要求对于我们来说就是相对于较高的要求。那我们有更大量的平民要求，从一个短缺经济转过来的，要求质量比较低，价位比较低的。所以我觉得这个市场就是说你说高支付能力的消费群体，你才有高价值的产品。换句话说，就是在任何一个传统文化它市场都是细分的。那么像中国、法国这种中间社会传统比较强的文化里，他都有，比方说我们国家的瓷器，它就有官窑和民窑。那么官窑就是高价值的，一年只做几件或者数百件。但是我们做的这些呢，就是皇帝用的。都是精挑细选的，用了几件后挑出一千件买的，给皇宫送去，剩下的做残次品，以前这种残次品甚至要打碎，不能流到民间。后来渐渐才，官家也没那么富了才拿去卖。但相对来说，民窑的量就很大，但相对来说就很便宜。传到现在我们也知道，我要收藏的话，我要收藏官窑的东西，官窑的东西就值钱，民窑的东西就不值钱。这个就实际上说明历史你要说它是升级也好，说它是垄断控制也好，它存在的价值链是有分化的。那我们现在看流传下来的，知名的都是官窑。历史上存在过的大量的民窑，窑堆没有了，消失了人们也不是很在意。你很难说它是升级，确实中国几大官窑，如果你看它历史的发展，它是有一个此消彼长。就是说可能先去政治中心在西安的时候，那时候著名的官窑可能就在那附近，比如说耀州瓷，也是烧官窑。陕西的耀县。开封那周围也
有。汝窑，钧窑。所以说这些东西，他们到底如何确立了官窑的地位我没有研究过，你可能得去访谈陶瓷方面的专家。它可能也有一个升级过程，可能大家都在烧瓷器，哪一家就提升起来成了官窑了，大家也不知道。那你说除了这一种，它国内这种市场细分，肯定官窑是很少的，还是以民窑为主体的。只是我们不知道历史上，不关注历史上的民窑。还有那一种，就是泉州那边的瓷器。那你自古以来都是出口的。它的出口就是有高端的也有低端的，顶端的有出口到波斯阿，到欧洲王室阿。这远距离出口的瓷器本身就已经是种奢侈的东西了。

Jane: 其实景德镇的民窑也有很多通过泉州出口到中东那边的。

童：你说那个时候是高端还是低端，那时候你能支付得起这样远距离运输的产品的人就已经是整个社会比较高端的产品了。那个时代和现在已经很不一样了。现在反而在中国很贵的瓷器，景德镇烧一部分仿传统的，仿古的瓷器。你在市场上看到的很多高端瓷器反而是从意大利、西班牙那些地方进口过来。说到底就是说生活方式变了，你要的这些它的质量、它的形象也好。那么你还是那个高端的胃口，你能品味，那你只能不断的去仿那种技艺。它不符合现代生活的，就好像我也买过，景德镇的这种仿古瓷器，它买过来只能摆设，不是用的，烧得很漂亮。但是我们现在也不会在瓶子里插梅花。也不会用那种玻璃缸养鱼。很少，我们会用那种自动换水的那种养鱼。那我们现在需要的瓷器是要一种很轻巧很好洗，表面很亮，然后它的用法，就像现在喝咖啡，喝茶，这样的用法。从这个角度上要转型是很困难的。人家对你的认可，对你的价值，对你的技艺的认可也不在那个上面，你说他烧不出咖啡壶或者是茶杯吗？也不是。但你说我要买茶杯何必非得要买一个景德镇的烧造的，或在概念上给它一个很高的价值，或者花很贵的钱去买一个。我曾经买过一个景德镇的笔筒，瓷烧的还镂空的，非常漂亮。我在想这个东西买的人就很少。如果真用来插笔，我反而用一个食品盒，如果经常用的话反而用这种，它不怕摔，不怕跌，不怕碰。我那个瓷器在那，我反而不敢把笔往里放。做得非常精致，外头雕花的我总觉得一不小心把它给碰坏了。所以说景德镇的瓷器就给你这种感觉就是远远的不太能接近。和你的生活不太一样了。

Jane: 那你对于我做这一方面的研究，你觉得我有什么地方需要注意，或者他有什么样的点我可以去探讨的。

童：我个人觉得你应该去访谈一些瓷器收藏者。他们有一些比我内行得多得多的讨论。我个人很喜欢瓷器，但 unaffordable。我买的瓷器都是自己看着玩的。真正很贵的瓷器我是买不起的。但是我非常高兴。就是说瓷器这种东西它的文化价值差在这个地方。就是会有人非常喜欢。当你非常喜欢的时候，那个瓷器是会有生命的。你想想在，瓷器的发明是非常伟大的。它就是沙子，然后土烧出来的，但是烧得这么好看。它在古代食品安全是个很大的问题，不要有细菌滋生，瓷器它表面的质地非常好，它很容易洗，然后给你感觉就是非常干净。而做得非常好的瓷器就会给你有生命的感觉。然后就是为什么瓷器会让人有一种心痛的感觉，然后舍不得用它。真的有价值的瓷器都是有一种很精致你怎么舍得用，然后看，放在那，把玩。我们知道流传历史常的瓷器比玉器银器还要贵。就是因为它保存的很好。如果你要拿它当个物件使，你看我用的物件，我这人手不是特别稳，所以我用物件，我都不舍得把物件打坏了。所以你就说把它当物件来使唤的话，所以你关注它的使用价值的话，它就不会是一个非常，就像你说的升级和增值很高的东西。中国的所谓的道家文化就是无为用，有为器，无为用。就是我这个东西作为器品拿来使的时候就有，那么它真正，无为用就是它真正，当然了，这句话这样说用可能还不太合适。它真正很无形的那部分，是它价值体现的那一部分。然后那一部分你要找这个行业当中，非常投入的去看它的人，非常去研究的人。我相信他们给你提的建议更有价值。你可以到琉璃厂阿，潘家园阿去转转，看看。包括我推荐你去故宫里去看一看。你去体会一下这个瓷器好在哪里。它可以做得像玉的感觉，像纸一样的感觉，有时候我看了以后觉得你怎么可以拿这样的碗吃饭。

Jane: 所以之前我还没有想到要去找瓷器收藏者来采访。我只是想到去采访当地的一些工匠。
童：你去采访工匠是应该的。因为你这几天还在北京，你好好地看一看。因为景德镇它曾经最大的用户都在北京，不是都是皇帝在用吗？所以它的好东西很多都在北京，包括它的为毛主席使用的那些，为毛主席特烧的。

Jane：也是景德镇烧的。

童：对！景德镇曾经在七十年代烧过一套梅花的一套，也是当时烧了很多，从当中选了最好的那套是送到北京来。就是它你看它那种价值的驱动模式，和那种普通的消费品是不一样的。因为那种价值不在了就是说你在这种普通的是市场上，当然西方也有很富的人买那些瓷器，回去也不是拿来盛饭的。这种人在社会上就是少。所以瓷器烧出来这么多，有几件就是能够找到知音把它们收藏下来，一代一代像宝贝一样传下去。就像人一样，这么多，但遇到那样待遇的却那样的少。

Jane：我也觉得是景德镇的瓷器它分成两个层，一个是非常低，一个是非常高。你现在也可以非常便宜就可以买得到景德镇的瓷器。所以这个产业要找到对的路子，不然它现在底下的都是在亏本的。就是不是一个经济非常好的一个现象。

童：实际上就是我刚才说的那个，就是它在民用的这一块还没有让人认同它的价值。以传统上讲，我们觉得说这种现在的瓷器的烧造技术冲击的情况下，它就和其它民用瓷器一样。就是说中国现在是烧瓷器的地方还不少，像唐山唐陶，也是中国烧制陶瓷比较多的地方。因为陶瓷这种东西不适合远距离运输，所以它在很多地方都会有烧陶瓷的这种工业在。就在民用这一块，景德镇搞不搞，怎么搞，我也说不出来。因为他在市场品牌的口碑阿，至少在目前来说都不是特别有优势。反而我们市场里面，超市里面很贵的瓷器都是韩国的，台湾瓷器，更高端的就是非常贵的在北京的一个奢侈品店里它的瓷器都是意大利的啊那些地方来的。这种市场，景德镇能不能去从新去进入，从新去建立。这个都很难，因为整个中国人的生活方式都在西化。它还不像日本，它一边在西化，一边保留一大片日本传统的这种方式。领地在。它的很多的工艺还是在这个领地里生存下去。不过我们整个生活方式西化得非常彻底。就是很少有人过需要那些器物的生活，这种问题不是景德镇本地能够解决的。它要烧制像意大利那样的瓷器或者像韩国那样子的瓷器。按理说，韩国跟中国的传统文化很像。但它烧制的瓷器给人的感觉也是非常漂亮的。就是那种花呀，质地阿，给人的感觉非常的细腻的，同时它还可以微波，有一些新的特性在那里。我不知道这些方面景德镇是否研究过。

Jane：其实景德镇在历史上来讲，它是有根据市场需要有产生非常多的变化。就像雅俗文化。它有雅的文化，也有俗的文化，它的适应生存能力还是蛮强的。可是这几年，它好像走不出历史的阴影，还是怎么样的。就是不能够像以前一样一如既往的变化，就能产生新的风格。它在生产一些波斯、中东的一些风格的东西的时候其实它也是采用了他们的设计。然后采用了当地一些比较风靡的一些图片，然后它为英国做的，就有英国的风格。其实它不是适应性很差。但是这几十年的发展来讲，可能从解放一直以来，就很难烧制出适应生存能力比较强的物件。

童：这个我觉得你应该很值得去研究。这些东西我确实是不太懂。确实你从你的立场来看，可能建国以来的过程可能对它的打击很大。它经过一个国有化的过程，然后再转制。可能在这个过程中，这个市场阿、技术阿、创新能力啊，会有什么变化。这些可能得你去研究。中国在瓷器烧造还有很多地方，比如说是佛山。王老师去过，原来在佛山做项目，我们也都去参加了。佛山陶瓷在国内还很有名。佛山陶瓷其实它市场化很强烈的地方，它的这个陶瓷转型的时候，我们看到它转到哪里去了，都转到建筑陶瓷去了。中国房地产工业的那个建筑陶瓷，使用量大，而且利润也非常高。所以它不在这种民用瓷器上。民用瓷器就在这两年我感觉民用瓷器非常贵。在超市里买瓷器的时候。在我小的时候，碗非常的便宜，两块钱，一块五。有时候翻过来看，居然是景德镇的。看你怎么看了，就中国建国以来这种社会制度改革，我想当时候很大程度还是想到我怎么来满足最大多数人的最基本的需求。你用什么方式
来满足，可能原来的方式不够好，其实市场化还是在解决这个问题。要用最便宜的手段来满足大多数人需求。所以那个需求我们来看，其实等到你有升级需求的时候，你已经把那个taste给破坏了。就好像我去美国的时候我有一个朋友对我说，就是美国那个叫China buffet，就是中餐自助餐，就是把中餐的taste给破坏掉了。中餐本来是和意大利大餐一样正式，很复杂，很高品位的一种饮食文化。结果给China buffet一弄，弄得吧也不像中餐。你进去一看，每个人盘子里好像是各种杂烩在一起。可是它很便宜，然后很风靡，然后就给很多人感觉这就是中餐。我的朋友跟我说中餐就是吃China buffet。外国人推荐说有个China buffet你可以去吃。这怎么说，就是你一个市场的趋势。就是你刚刚市场转轨的时候，就会转向这种最市场化需求的那种类型里面。那你进了那个类型里面往上抬就很难了。这就是为什么对于这种问题，我没有研究过，但自己感到有趣，中国古代这些民窑当中，怎么蜕变出官窑出来。可能一开始大家都是烧造这种，但这个还真是不好说。这个历史到底怎么回事，还真是不知道。原来这个老百姓是先用陶器的，这个瓷一开始就是高端产品。它从高端产品慢慢变得便宜了以后，质量比较低的平民消费。所以这个很难说，能不能逆向从这个平民消费当中推涌出官窑的这种高品质的品牌出来。

Jane: 这个就像，之前有个老师叫作方李莉，她是中国艺术研究院的老师。她就讲说中国的官窑和民窑是互相竞争而合作的。就像Porter讲说Coopetition，就是Competition and Cooperation都有，就产生了当时民窑和官窑的水平比较接近。而且很多官窑，有时候烧制赶工的时候，缺乏一些工人的时候，也会从民窑当中比较好的工人挑选去。所以它们不是完全独立没有联络的。

童: 所以我觉得你这个研究很有意思。你如果能把这些就是历史上为什么那么成功，现在它为什么会有这样子的困境。然后可以很系统的给大家展现出来。这个故事本身是很有意思的。但是我说的可能不是对你的贡献很大。

Jane: 有的有的。其实你对瓷器的了解还是蛮多的。

童: 我确实很喜欢瓷器是真的。就是我看到好的瓷器我会非常有感觉。所以我也能理解有钱人为什么会花那么多钱去买。确确实实你看到一件做工非常好的瓷器，是会让你感动。所以我建议你，不一定要去找很多人去聊。去看，看非常好的瓷器。北京是一个宝地，琉璃厂，潘家园，还有一些老东西，故宫，首都博物馆。

7.4.1.3.5 5 Interview 17 September, 2008 Jingmi Wang
用集群来描述一些现象，但是很多时候不是我们对集群的认知的概念。就是一些集群热潮在中国就是有它特殊的时代背景。所以造成了从上到下，大家都在讨论集群。但是真正了解集群它的概念和意义是什么，并不是每个人都能够很确切了解集群的意义是什么。

Jane: 那么从经济地理学的角度来说，集群的概念是什么？
王: 因为经济地理学比较关注的是各种经济活动在地理空间的分布的情况，然后它形成的主要原因，所以会比较focus在空间。在一定的空间范围内，各种经济活动在这个地方内集聚的情形。所以说，如果有同类的上下有相关的企业，在同一个地方聚集，然后他们之间有一定的联系，关系的话，这个就相对上比较符合我们对于集群的认知。

Jane: 那还有什么其它的方面你有发现现代研究的特点？
王: 你说在中国？研究集群的特点，在台湾的话，在台湾不用集群这个词。但因为都是一样cluster。大部分是讲一个群聚的现象，因为台湾不是很大，所以基本上北部，中部，南部都有不同产业群聚的现象。比较有名的像新竹科学园区，像一个Learning Region。有些学者比较关注它跟Silicon Valley之间的关系，然后跟中国大陆这边的联系。那是在竹科。那如果是在台湾中部的话，就是机械器具。就是机械器材，群聚的现象很明显。南部的话，现在也有科学园区。打造了三个，一个是新竹，一个是台中，一个是南科。然后他们分别是在不同的领域的。比方说在南部的话就是面板，做液晶幕的那个面板在南部的那个地方群聚。在台湾可以研究的案例，可以说实在是不多。所以也有很多人关注大陆这边。有很多是台商在大陆投资的情况。然后为什么选择在这个地方群聚。

Jane: 那你研究侧重的产业是在哪里？
王: 我现在比较关注的是深圳的数字电视产业。它的那个产业链很长，而且很复杂。目前是以数字电视产业，因为在深圳它的群聚现象很明显。所以说这也是我的博士论文。

Jane: 那你现在去做过几次调研了？
王: 我去做过两次调研。就是去年暑假一次，今年暑假再去一次。

Jane: 那对于你现在研究的数字电视，你觉得它有什么特点？
王: 它就是产业链很长，然后很复杂，这个行业就是数字电视产业，因为它包含了硬件制造的部分，然后也包含了软件。那因为这个数字电视所涵盖的不只是一部电视机本身。Even是电视机的制造，它所需要的零配件非常的多。然后要观看数字电视节目，还需要有SetupBox，这边叫机顶盒。然后机顶盒的制作里面有需要比方说是芯片。因为奥运的关系，这边是非常的推广，所有奥运直播的节目，都用数字形态，然后都是用high definition播出。大家都可以看到高清晰度的电视节目。然后，机顶盒它里面都需要芯片，还需要软件。你需要制作像Menu一样的让大家点选。所以它就包含了一个digital content。这个产业也在里面。它从上游，到下游，再到User，然后再看。它的产业链非常长。然后它需要的零部件非常的多。

Jane: 那你觉得深圳的数字电视产业算不算是一个成功的案例？
王: 恩，应该说它有它的历史背景。深圳最早就是电子产业。早期那边就是做电视机的。就有三四家中国彩色电视机的龙头。然后它周边的配套非常多。它可以把电子产品里面很小很小的零件，螺丝钉那种，它也是市场，你要找各种都有。其实上最典型的应该说是手机。深圳的手机，如果你有到过深圳华强北电子市场的话，就像你所说的市场，它有一栋大楼，全部都是卖那种要做手机的所有的零件全部都有，像那边也有很多手机的摊位。山寨机你有听过吗？比方说我们买过像Nokia，Sony Ericsson品牌的，但那边山寨机是它没有品牌，因为价格就很便宜。就很多不合法的，黑牌的。比方说Nokia，它就不是写Nokia，中间换一个字母，但看起来很像的，类似那样的。一个商店小小的个摊子，它可以生产所有你可以设定的手机。店里面都可以生产出来。所以那边地方手机生产集群非常非常明显。就是产业链非常非常完整。数字电视的话，它需要的零部件就更多了。所以它在深圳那个地方就是，
其实深圳还算是蛮大的。在高新区内之外，它在特区，特区外，像龙岗都有很多很多的工厂，有些有品牌的像做手提盒的也好，做电视机的也好，它会把工厂设在周边。有的甚至会在惠州，也在深圳的周围。基本上就是整个大深圳地区，这样讲的话，东莞听说没有，就是这整个区域，配套很完整。

Jane：那除了你自己关注的这个产业以外，你还有没有发现有哪一些集群算是比较成功的集群？

王：成功的集群。温州那里，应该是。但是我觉得今年的情况很特殊，比方像东莞那边很多工厂也都倒闭了。我觉得今年变化非常非常的大。因为像很多台商的工厂也都倒了。尤其在东莞那边很明显。

Jane：原因是什么？

王：大部分那种劳力密集型的企业都是，比方说像劳动合同法的实施，有最低工资的要求。还有就是原物料的上涨，它的成本提高太多。还有就是人民币不断的升值，就是美金一直贬值。然后很多的计价都是用美金，那么出口就很不利。倒得非常非常多。

Jane：你对景德镇陶瓷有了解吗？

王：我没有去过，但是我想我想大家都应该知道景德镇的陶瓷产业。因为我以前是在台湾教地理。所以我们都会提到。像我妈之前去玩，去玩都会买景德镇的瓷器。

Jane：景德镇的情况我大概讲一下，景德镇它的陶瓷产业有存在 2200 年。我现在为止还没找到比它历史悠久而且还存活的集群。那它的 Life cycle 就会变得很特别，因为它的 Life cycle 就可以足够长，可以让你研究。我们现在研究集群时，我们只能研究它起初的，不能研究它的 Maturity，它现在只能研究 Birth，如果我们没有一个足够长的 Life cycle 可以研究的话，可能很难做 Prediction。所以我就去做这样子的一个研究。就你看，对景德镇这样一个传统文化产业的研究，是否对现代化一些产业有帮助呢？然后，从那些方面你可以看到说有帮助？

王：因为中国崛起，所以只要跟中国元素有相关的都很值得研究。像东南沿海，其实都是因为改革开发，那些都是后来的政策。像景德镇瓷器之有名是就像你刚刚说的，它的历史非常非常悠久，而且它一直持续到现在。但是它确切在景德镇内部有一些工厂嘛，有一些设计的这些师傅，我就不是很了解它们之间的联系情况是怎么样的。举一个例子，就是台湾有一个地方是莺歌，也是做陶瓷的。那个地方的陶瓷也是非常非常有名。所以那边就有比如说设计，即使是传统产业也要不断加入新的元素，才能让那边的产品有 Market(市场)，销售能推广。所以说像这种手艺制作的人才，我对中国瓷器不是很了解，然后它们的工厂之间彼此的关系是怎么样的，我觉得研究这个是非常有意义。如果能确定它们彼此之间的 Network，他们彼此之间的网络情况是怎么样的。他们如何共同面对中国其它地方有没有同样做陶瓷的产业它们之间的竞争关系是怎样的。然后跟海外，它的市场销售情况是怎样的。海外那种做 Design 的，对景德镇是不是有兴趣，是不是有一个怎样的联系。我觉得做这样的研究应该很有意思。

Jane：我想请问一下现在中国的学者是否更关注于集群现代化的发展，还是更关注集群的历史的根源呢？

王：我觉得这两者之间的关系是不可或缺的。因为每一个集群的发展一定有他的历史背景，它如果没有很深厚的 Background 的话，它很容易走向衰亡。就是它可能就是昙花一现，就消失了。所以如果说有比较悠久的历史。所以就像我说刚跟你说，如果能像景德镇可以往前推它的历史是怎么样的。因为当时它肯定不叫 cluster，比方说它有我们以前叫做……

Jane：我们以前有过行会。

王：它主要是商人之间的。像这个如果可以把它串起来，这也很有意思。即使只是商人之间，如果可以找到一些资料，讲到商人之间的，比方说景德镇那边有没有什么学校，它是不是有
Jane: 其实很有趣。景德镇陶瓷有七十二道程序。然后每一道程序，有一个家族非常厉害在那一边。比方说有一个家族姓黄的在拉胚很厉害，它就很厉害。所以是整个家族在那边做。很有趣的是工序跟家族的关系。
王: 这有点代代相传的关系。这就在中国很有特色。中国人就很讲究你是同门，同师兄弟，同姓的，同学阿，同乡阿，就很容易有特殊的感情。这样的话它的基础才能比较稳固，有比较直接的联系。
Jane: 所以你是同意对传统文化产业集群的研究有助于集群现代化的研究对不对？
王: 传统产业如果一直传统下去的话，它没有办法跟现代做一点联合接轨的话，很容易就消失了。如果能够在传统产业找到一些创新性的元素，很有创意的东西，很有设计感的东西，它就跟现代结合了。现在的人也有人返璞归真，去买很复古的瓷器在家里喝茶，那有人去买那种看起来很旧很旧的东西，对吧？就像我们买杯子，如果可以有点设计感的东西，即使是很传统的，一样可以赋予它新的元素嘛。

7.4.1.3.6 Fieldnote after 4 Interview

According to Interview 4, Dr. Tong introduced several places in Beijing for me to visit antique and new Jingdezhen porcelain. Beijing, the capital city of several reigns is the biggest consumer of fine porcelain wares. Today, I visit Panjiayuan Flea Market. There are some spots specialized in antique Jingdezhen porcelain found overall China. There was one spot selling Jingdezhen antique found in Fujian province. The porcelains were probably found in sink ships along the coastline of Fujian province. There was a antique collector using microscope to look at the surface of a vase, it was to exam whether that piece is really from that age and is really from Jingdezhen. He said, the antique market is a mess in China at the moment. The real stuffs missed up with fake ones and are very hard to tell; even antique specialists could not distinguish a real antique and a fake one (Pomfret, 2008). He said now Jingdezhen produce different kinds of porcelain and ceramics, the market is quite broad. After that we also visit some shops that sells new Jingdezhen wares, they looks new and very flesh. It is different to tell the styles as many of the new ones even are not fake ones (as the shopkeepers told us they are new porcelains), the styles are very similar to what we just found in the antique spots. The price range is quite wide from several hundreds to several thousands. The market does not have a standard price. It could be just in the reproduction and antique market, not other markets, however it requires further exploration.


7.4.2 Field Work in Jingdezhen
7.4.2.1 Photos at Field
7.4.2.1.1 Fanjiajing Fake porcelain village
7.4.2.1.2 Jingdezhen porcelain museums
7.4.2.2 The Four Jingdezhen Porcelain Divisions- Samples

7.4.2.2.1 Reproduction of Ancient Porcelain from Fanjiajing
7.4.2.2 Qing Dynasty Stream Porcelain from Arts Porcelain Factory and International Porcelain Fair

7.4.2.3 Contemporary Porcelain from Jinchangli, Sculpture factory and International Ceramic Fair
(Above is a craft by a local artist in his early 30’s)
(Above are some ceramic accessories designed and made by students from Nuxun Arts Institute in the northeast)

(Above is a sample from Franz porcelain Ltd at the International Ceramic Fair)
7.4.2.2.4  *Kitchenware from International Ceramic Fair by Jingxing Porcelain Factory*

7.4.2.3 Interview Transcripts
7.4.2.3.1  *Interview I: Kuang Kesheng, Shaojiwu, 20081011*

Interview Transcription 20081011
地点: 筲箕坞
姓名: 匡科胜
年龄: 35
教育背景: 大专
工作: 政府公务员，老婆是搞瓷器的，做瓷器的
工作地点: 在 筲箕坞，古陶瓷一条街

Jane: 那么现在在筲箕坞 古陶瓷一条街有多少个店面？有多少个卖陶瓷的从业人员？
匡：店面的话有五六十家左右，不到一百家，反正具体的数目我也没有做统计。但是从业人员大概有两三百个。有两三百家陶瓷，因为他们都是同租一个货架的。合租一个店面的。

Jane: 像这样合租一个店面的话, 他们会是竞争对手吗？
匡: 像他们合租一个店面的话一般都不会是竞争对手。我们做陶瓷的话，有一定界限的。比如说，做图案的人必须做自己图案的，不能去做花鸟；做花鸟的人，就不能去做图案。都有分工相当明确的。不会因为你的瓷器好卖，你的花鸟好卖，就去做你的花鸟。这样就会产生矛盾与冲突。就不可能在同一个店面里头，一起去经营。

Jane: 我们刚开始聊天时有说过陶瓷业很清楚。或者画花鸟，画山水，画图案的都是不同的人，你可否再重复一遍。
匡：像我们这边做陶瓷的是裙带关系，亲戚关系比较多一点。做花鸟的人，乐平人最主要是做花鸟，他们的花鸟画得相当好。譬如说，我是师傅的话，我是乐平人，我的亲戚，譬如说我的侄女，我的外甥女，或者是其他亲戚，或者同一个村子里的人。他就会找到我向我学习。如果我是擅长画花鸟的话，我就以我擅长的教给他。所以他们就跟着我学花鸟，就不可能学其它的，如图案、青花或者别的什么东西。所以我带出来的一帮人都是学花鸟的。所以这个很清楚是一个裙带关系。乐平人是画花鸟的，鄱阳人是以画图案为主，都昌人是以人物为主。都是因为裙带关系，因为原来的师傅是学人物的，他就跟着学人物。原来的师傅是学画图案的，就学画图案。它有一个种别，有一个种类。

Jane：我想请问你，你们开店有多长时间？
匡：有两三年。因为我原来是从事会计转行过来的。我原本对瓷器是根本不懂的，是凭着自己的兴趣和爱好，慢慢对瓷器一点一点懂的。从它的制作程序和各方面，慢慢摸透以后再从事这方面的陶瓷工作。

Jane：那么在你们的店里有你的亲戚跟你一起工作吗？
匡：在我的店里头我有请我的外甥，外甥女，其他的就没有，都是请别人，来画的。人家画瓷器的师傅画的。

Jane：就是根据订单，你就请不同的师傅，对不对？
匡：对对对，就是根据订单，根据他们的喜好，他看我们做什么瓷器，他就给你定什么瓷器。并不是拿什么瓷器来都要定做的。譬如说我是做图案花鸟的，你就找我做图案花鸟，你有需要做图案或花鸟的话，你就必须找我做。我就给你做图案花鸟。

Jane：景德镇这个陶瓷，它的分工合作，譬如说你会去买白胎，是怎样的一个次序？
匡：像我们景德镇的话，这个次序是很明确的。卖白胎的就是卖白胎，卖白胎的从泥巴的成型，做坯，利坯，他们是卖白胎的，我们有那个制完以后，我们就得去他们那里买白胎，回来以后自己经过加工的。它程序是很清楚的。

Jane：像你们卖完白胎，就会画胎，然后填色，还有那些部分是属于你们店里面自己做的？
匡：我们请师傅画晚了以后，我们就要填，因为我们是粉彩嘛，所以就画完以后就要填颜色。就是粉彩颜色填的，填完以后，该写字的要写字，比方说写诗啊，底款啊，什么的，写字有写字的师傅来写。因为他们分工很明确的。写字有写字的师傅。写完字以后，有些地方要吹绿，就是口子和底盘，要吹绿。吹绿又是吹绿的师傅来吹的。就是你在我们店里面看到瓶子，它的口子和底盘都是绿色的，原来是白色的。吹绿有吹绿的师傅。吹完绿以后再拿去烧炉，烧炉又是在烧炉的人。不过现在很多小作坊自己有炉子，都是不需要别人烧了，自己烧。而是我的话，因为烧炉很麻烦，要烧很久，还要控制那个温度，一个是温度，第二个呢，时间也比较长。我们有专门去烧炉。就拿给别人家去烧的。烧完了瓷器以后，我们再拿到店里面来卖。

Jane：所以你们就是做其中几个次序，然后就卖。但是当中很多部分，你们还是要和别人一起分工合作。所以景德镇这个陶瓷产业，分工很细，然后带动了很多的副产业支持着它，就像我们那边遇到的挑坯工。
匡：还有拖白胎的是拖白胎的。就是比方说我们你们家订了四五十个胎，你这个白胎怎么运到我家去呢。就必须用板车或汽车运到家里去。就产生了这个行业就是瓷器运输工。其实我们那天遇到的那个挑坯的人，也是运输工。

Jane：你们那边街，有两三百户，那大部分都是家庭作坊吗？还是说有百分之几是公家的，或者公家的？
匡：像我们那边街是100%都是家庭作坊式的，家庭作坊式的有的做的很大。有的有一百多个工人，有的做得很大的，有的没有多少工人。有的完全是自己夫妻二人，就是夫妻店，老公就是画瓷器的，老婆是填瓷器的。他们就是调白胎直接来做的。所以说像这种模式，就是把景
德镇的瓷器做烂掉了。为什么说做烂掉了呢，因为我们做老板的话，直接请人画的话，成本很高。比方说，我叫你画一件300件的瓷器，要一百五十块，要两百块，要两百多块怎么讲。还有填瓷器，填瓷器又要一百多块钱。好要白胎要一百多块钱，画瓷器要两百块钱，填瓷器一百多块钱。这样加起来就有五六十，对不对？比方说我们是老板的话，五六百的话，肯定要有利润。我就卖个六七百，赚个一百两百，对不对？这样的话，他们就赚不着了。原来的话，他们知道成本是多少钱，他们会让你赚一点，原来的话利润相当高。原来的话，我们做瓷器的，现在都发财了。现在的话做瓷器就相对难了一点。夫妻店把景德镇的瓷器做烂掉了。因为我们是老板的话，请别人画，各方面工资都是要算进去，没有一定的利润我们不会卖。比方说我们原来卖七百的，你们夫妻店卖五六百。把瓷器做烂掉了。因为他们没有算上自己的工资。他把自己的人工钱以为是自己赚到了钱。就是这样子。

Jane: 那平常会不会有很多同乡之间的互动？
匡：同乡之间的互动的话，也有，联谊会有有的。通过互相交流一下，喝喝洒，吃吃饭，大家在一起交流一下感情。就是因为我们是老乡，是朋友，这样子。

Jane: 在陶瓷这个行业，从前有都昌人，他们是不是同乡，同族的意识比较强烈？
匡：怎么讲，都昌人，在我们景德镇所有的印象中都不是很好。因为他们，用我们景德镇的话叫鬼，比较叼，就是比较坏的那种感觉。他们那个风气不是很好。

Jane: 就是对对，就是那种感觉。因为都昌人他们形成了自己的一种风格。就是比较鬼的那种感觉。像抚州啦，鄱阳都稍微好一点，都以诚相待的那一种。

Jane: 一般来讲，你做一种陶瓷生意，你要互动的陶瓷界的人跟群体算是蛮多的。不同的方面，你可能要接触的人很多。
匡：对对对，也要接触不同方面的人。各个方面都要接触。因为我们做陶瓷的，我们的种类是很多的，各方面分工不同。就拿一个瓷器来讲，有荷叶的，有釉上的，有彩的，有新彩的。各种分工相当明确的。

Jane: 之前你有谈到说，日用瓷，陈设瓷，雕塑瓷，仿古瓷的市场也是非常的清楚。那你可不可以再重复一下。
匡：好的，没问题。这个市场有很多，雕塑瓷主要分布在雕塑瓷厂。雕塑瓷厂主要在新厂那一边，明清园那一边。像一般的工艺品的话，在昌家井，不是很高档的，主要在那里。买贴花的或一般的瓷器的话，就在国贸，国贸他们针对的客户群就是跑展销的。就是搞展销的。本来不是景德镇搞展销瓷器，全国各地都有那个搞展销的。本来景德镇的瓷器在别人的印象中是相当神秘的。现在就是搞展销了，搞展销的人大部分都是附近农村的。他们就是为了赚一点利润，他们才会去。因为他们在家里种田，一年到头也赚不了多少钱，他们一个月在外面跑展销也有几块上千块钱。他们觉得利润很好，虽然大家不觉很高，但他们讲起算的还不错的。他们种田的话一年到头才几千块。跑一次展销都能赚几千块。他们，说得好听听一点是把景德镇的瓷器做烂了，做强了，让全国，甚至全世界的人都知道景德镇的瓷器。说难听一点的话，就是把景德镇的瓷器做烂掉了。因为他们交易的时候不是很诚信。举个例子来讲，我刚去跑展销的时候，比方说在你福建厦门跑展销的时候，前两天我卖瓷器，一件瓷器我开价是三万块，比方说你买了我一件瓷器是五万块钱，你买回家，很高兴，因为买到了景德镇的好瓷器。心里是高兴的。但是到最后，他们要撤展的时候，还有瓷器没有卖掉，比方说同款的瓷器，因为它没卖掉，他几万块钱都可以卖给你。你说甚至亏本都会
卖给你。就是亏个一两千，一千块钱卖给你都可以的。比方说你花了五万块钱买这个瓷器，别人花两千块钱买这个瓷器，你心里怎么想，你恨不得把这个瓷器扔掉，摔碎去。所以说把景德镇的瓷器搞烂掉了，做烂掉了。

Jane: 就是价格方面没有很诚信
匡：他们就是说自己能赚钱就够了。不管别人的感受。比方说原来的一个薄胎碗，它的工艺程序，原来它是十五万，集体国营的卖过一个十五万，我一个北京的朋友跟我讲，现在的话，薄胎碗多少钱一个，十几块，二十块。像你们买瓷器的话，都是为了让它升值。对不对。现在反而降得那么厉害。你心里怎么想。十五万块钱买一个十几块的瓷器。心里很不舒服，所以的话景德镇的瓷器的价位就做烂掉了。但好像潮州瓷，今天一块明天一块一，反而升值了。

Jane: 讲到市场的问题的话会不会日用瓷跟艺术瓷有个非常明显的界限。
匡：对，有个非常明显的界限。艺术瓷艺术大师他们的价位反而上去了。他们是按多少钱一件，100件的瓷器，看什么人话，像王锡良的话就几十万了。100件的瓷器几十万，像一般名气的人像省大师也要上万块钱，一两万，像国家大师就几十万。对不对，像一般的话就卖几千块。最主要的是看那个大师的名气大。像仿古瓷的话它没有那个了，按着成本做，自己能赚多少就够了。它不会像几十万的。真正的老瓷器的话可以达到那个价钱。可以卖十几二十万。

Jane: 做老瓷的，还是本来就是老瓷？
匡：怎么讲，现在真正的老瓷很少，赝品比较多。就是仿古，现在的仿古要做到连釉色，釉水，器型，做旧的程度跟老瓷器基本上达到一样的话那个价钱就上去。因为那个赝品的话价钱就上去了。

Jane: 赝品跟仿古又是两种概念。
匡：对对对对。像仿古的话它根本不叫赝品。对不对，我根本没有卖你那么多钱。我卖你几十块钱，如果是赝品的话，要卖几十万上百万。对不对，像抚州人就是专门搞这方面的，杀猪的。其实你根本不知道像我原来都参与过这方面的东西，并不是我参与，就是我用车子送他们到一个地方。他是上海的一个客户吧，他来买老瓷器。他们抚州人就善于操作这方面的东西。你不要大势宣扬，我把景德镇的瓷器搞得不太好。就是说他们会叫一个人，叫一个农民穿得很破很脏，抱一个瓷器到你那边去，就说这是他祖传的，怎么样。他们通过这种方式来骗人。这种很多的。

Jane: 这也不是什么新闻，就在新西兰前两个月，就有一篇文章写景德镇的赝品（ODT），就是说他们在生产的时候也是很隐秘的。他们在某一个地方生产，看它们的逼真程度多少，80%，90%越像的话，它的价值越高。它们就使这个古董拍卖的市场信用度就有点低了。对，也是破坏这个市场。
匡：他怎么讲啊，抚州人善于操作这方面，连拍卖行里的人都可以进行合作。

Jane: 所以不是只是一环的问题，而是好几环的都出现问题。
匡：这个不要录了。

Jane: 这个只有我和我的导师知道。
匡：不光是景德镇的瓷器，其他地方的瓷器也是一样的。还有别的玉器方面。就是存在市场上的弊端就是这个样子的。没有办法，譬如我们要买东西买好的东西，就像陶瓷名家马未都说的那样：要善于吃药。吃药就是说被人家骗。吃完了药你才知道自己吃了药。知道自己错了。像市场上，还有其它的叫杂件。像金银铜器，还有木雕的东西，像玉器啦，它们都会搞这方面的名堂。不光是景德镇的瓷器。

Jane: 其实中国人做假是太厉害了。像三鹿奶粉事件一样。
匡：对。就是这次的奶粉事件搞得我们都不知道要吃什么东西好了。三鹿奶粉事件是针对全国人民的，伤害了中国人的身体，也伤害了整个中国的信誉度。整个中国人民的精神。像
做瓷器的话是损害个别人的利益。像能买的起古董瓷器的人，能吃药的人他们有一定的基础。伤害并不是很大。像这个奶粉事件的话，它比景德镇的瓷器，比所有造假的杂器，或者木器，或者玉器造假的伤害程度更大。是关系到全国人民的生命身体的。应该说生命高于一切。

Jane: 我们当时讲到国贸就没有再讲下去。还有其他的地方是做不同的瓷器。
匡: 除了国贸，还有金昌利。金昌利是卖旅游瓷器的。卖旅游瓷器的话，还有一个叫陶瓷城。它也是卖旅游瓷器的。他们基本上都是旅游团，或者是自驾游过来的。

Jane: 那金昌利我也发现它外面的店面也是卖日用瓷。
匡: 除了国贸，还有金昌利。金昌利是卖旅游瓷器的。卖旅游瓷器的话，还有一个叫陶瓷城。他们基本上都是从大师，或者是仿古瓷从我们手上调瓷器去卖。他们从中赚一点差价。

Jane: 像做日用瓷的，假体作坊多吗?
匡: 像做日用瓷它的量还是挺大的。做日用瓷的话，用景德镇的话就是说发财了。就是说他们虽然利润不是很高，但他们量很大。量大的话，他的生产作坊就很大，他投资也挺大的。这个方面做日用瓷也是有危险。因为你投资大嘛，对不对？像我有个朋友的话原来是做做仿古的。做得挺好，有个几百万家当。但是他自己做了日用瓷。但没有经营好，把自己的家当都当进去了。

Jane: 所以现在做日用瓷都是大公司在操作吗?
匡: 大公司在操作的话，怎么说。都是有一定经济基础的人在操作。就是说有一定销路的人在操作。像一般刚刚上路的人很难。

Jane: 像我有听说有为民瓷厂。还有什么红叶牌的。
匡: 像为民瓷厂，红叶牌的话，就是它那里出的瓷器。因为虽然十大瓷厂都倒闭了嘛，但是他们的生产程序被别人承包了。生产工厂也被别人承包了。他们现在各种各样的东西跟原来的东西应该是差不多的。艺术瓷厂，还有玉风瓷厂，玉风瓷厂他们应该是这样一种情况。

Jane: 那你对景德镇陶瓷产业未来的发展有一个展望，你觉得会怎么样子的？
匡: 景德镇作为一个千年瓷都来讲，现在瓷器界受全球金融风暴的影响，现在是走下坡路。千年瓷都它肯定也会有衰败，鼎盛，再衰败，再鼎盛，一个波浪峰谷型的那种。有高潮就有低谷，有低谷就有高潮。我相信景德镇以后的瓷器，凭着它作为瓷都，凭着我们做陶瓷的干劲，绝对不会走向另一个高潮。另一个鼎盛。

Jane: 像我是做集群研究的，我是研究集群在互动当中各个阶层的人，或者是集群，你们做陶瓷叫做主体产业，然后有副产业，我是做这种互动的。那你觉得说，如果能够优化这套系统的，对景德镇的陶瓷有帮助吗？
匡: 那肯定是的。对不对。比如说，我们的陶瓷产业，主体产业做好了，附带产业，或者第三产业，比如说做锦盒的啦，运输的啦，加工泥巴的啦，做白胎的啦各方面。肯定是利益是互相的。肯定是带动起来的。如果主体产业做好了，它的副产业肯定会带动景德镇整个经济。如果说景德镇的瓷器做不下去了，景德镇的经济肯定塌陷一半。对不对？景德镇毕竟是瓷都，以瓷器为主。如果景德镇的瓷器做好了，景德镇的发展就更大了。景德镇的瓷器没做好，景德镇所有的消费，比方说餐饮，娱乐，各方面都会受到影响。我赚到的钱，我卖瓷器，比方说一年赚到一百万。我这个东西，要请朋友啊，家属啊，或者是各方面，客户啊，一来的话我肯定要让他们上去吃饭，讲他们在宾馆里住啊，各方面都会带动，会带动景德镇的经济。所以说，主体产业做好了，整个景德镇的经济，副产业就会带动。

7.4.2.3.2 Interview 2: Li Aiqin, Shaojiwu, 20081012

Interview Transcription 2 20081012
地点：筲箕坞
对象：李爱琴
年龄：37
教育背景：技校小中专
工作：手工业画陶瓷，再买一点别人的陶瓷经营（就是陶瓷专营的店）
地点：筲箕坞

Jane：你是否独自来景德镇创业？
李：那不是，我是属于像陶瓷世家的那种形式，我爷爷是南昌莲塘人，当时家里穷，有五六兄弟姐妹。然后他排行老三，家里也没什么饭吃就到景德镇来学徒。就是从我爷爷手上，然后他很有成就。他是当时在景德镇陶瓷研究所第一届陶瓷美术家里面，他就是其中由一个，他是属于古彩的。他是五九年党和政府授予他光荣称号的三十三位艺术家，他叫李胜春（音译），画古彩的，当时杂志上都有宣传的。

Jane：古彩是一种画风？
李：对对，是一种陶瓷画法，现在报纸上都有呼吁的。现在的古彩都不是正宗的，都是从别的粉彩的线条演化来的。真正的古彩好多人都不懂，就是康熙五彩。他比较擅长于搞这种古彩。然后呢，我爸爸就是在陶院，就是在陶院的前身，也是属于中专类型的陶瓷（学院），现在政府都是比较重视了。准备给他评一个景德镇传统制瓷器代表性传承人，唯一的一个古彩继承人。像我呢，就跟我爸爸学徒。属于家族式的。

Jane：那你们还有其他的亲戚在景德镇吗？
李：有，我有一个姑姑在陶院，她是做会计的，不是属于做陶瓷的。像我妈妈也是搞陶瓷的，她是艺术瓷厂你知道不？搞彩绘的。我们家里都是搞这个东西。

Jane：你们是说你们是从南昌来的嘛。
李：我们祖上是从南昌来，但是我们都是在景德镇出生，在这里受教育学习。

Jane：家里面的亲戚有连带过来吗？
李：那倒是没有。搞陶瓷的话，他们就留在景德镇发展。如果搞别的行业他们没有到景德镇来。

Jane：所以从你爷爷到现在你们已经来了多久了？
李：哇，那好多年了。那我现在几乎有一个世纪了。一百年差不多，从他开始算到我差不多有一百年。

Jane：那你们在做生意的过程当中跟同乡人有互动吗？
李：我们这个不是跟老乡有什么互动。也不是从祖上我们来做生意的。他们当是从我爷爷，他们都是政府机构聘请的陶瓷人员。像我们是因为下岗没有事做。自己从事这种陶瓷行业，自谋出路。就是这样。因为陶瓷这个行业，你要有眼光有手艺你才做得下去。像我们一般不是像唐山那边，像别的瓷都一样搞得比较大型的，这些都是小型的手工业，都是自产自销。就是这个原因，所以说没有带动家里人来搞这个。
Jane：那就是说唐山那边的瓷厂都比较大。

李：他们的东西都是大批量的。我们是属于那种手工业，可能一对只有一两个，知道不，性质不一样。像我们这种仿古，大批量去做就不值钱，而且也没有那种心力。纯手工画的也达不到那种要求，用那种贴花啊，就达不到那种要求。所以规模比较小。因为市场需求量也不是很大。你要是大量生产的话，饱和了。像现在仿古就在走下坡路了。销不出去，因为市场上积累太多了。别人一般就很少进了。就是这个原因。

Jane：那你们平时生意上会跟很多不同的行业有互动吗？

李：这个啊，仿古没有什么互动。红木家具有一点。像做得好一点的人会到外地去进一点红木家具。放在这里，如果别人看得好的话也许会买。但是很少。

Jane：那像做陶瓷的，白胎你们也是自己做的吗？

李：像我们一般来说，都是到作坊里面去定做。除非是特殊的东西，不然一般都是定做。就像我需要这个器型，我就拿到作坊去定做。

Jane：那整个流程一般是怎么样的，从开始去定做，到最后大概是怎样的，你可以讲一下吗？整个过程是怎么样子的。

李：就是这样啦，比如说仿清的有图片的比方说这个做起来很好看啊。你就可以拿这个图片去订一个胎瓷。烧好了以后送到你这边来了。可以根据书上的画面画起来，也可以自己设计，然后填色，烧炉，成瓷以后就可以出售了，就是这样。

Jane：在这个过程当中，你也是需要跟很多这种本行业中的人有接触，比方说你刚刚讲的，你要去定做，对不对？所以说景德镇的分工是比较细的。

李：现在景德镇的分工很细，但是以前就不一样。但是作坊一般都是分开的。作坊做好了以后，老板就拿给技师画了。现在的技师达不到以前的要求。以前一个老艺人，他拿到一个瓷器以后，从设计一个画面，到填色都是一个人完成的。现在就不同，现在的分工很细。比方说那个绿里面是画人物的人画的，但是那个边角是画图案的人画的。然后填色也是分填人和填图案的。那就四个人完成。但是以前的话就是一个人完成。那以前人的技术就比较高超一点。样样精通。现在呢，因为它怎么说呢，分很细，你精通画图案，就画图案，但以前的老艺人就不同，他全部完成。画画、填色，写字，写款，他都是一个人完成的。

Jane：所以你们画一件东西的话，其它部分还要请别人完成。

李：对对对，不是一个人完成。

Jane：那画这些东西有没有所谓的地域性，比方说哪一些人比较擅长画什么。

李：当然有了。这个肯定有专长了，有些人比方说他人物画得好，有些人翎毛画得好，有些人山水画得好，还有些人青花釉下，他的那个青花画的好。这个肯定是很细的分工。比如他跟的师傅画人物，他基本上就画人物，翎毛这方面就不熟悉。他画可以画，但不会很流畅，线条比较生硬。就是这么回事。

Jane：所以一件器具下来要过很多手。

李：我想一下啊，几乎要到过，从填颜色，然后还要一个人吹绿。最简单的也要三四个人。复杂的话要达到七八个人。一个成瓷下来要过很多人手。比较简单的也要三四个人。
Jane: 那你是专长在那个方面？
李: 我是专长画人物。因为我以前在艺术瓷厂就是专门画人物的。我也可以学画边角，但我不需要花那么多时间，因为有专门的人画。如果我去学又要浪费几年时间。对，我可以专门去学一下。不是说你会画就什么都会画。要学习。像你们精通英语，不可能德语法语什么都精通。就是这么回事，一样的。

Jane: 那现在生意好吗？
李: 肯定不行了。从去年开始就不行，因为我们这种受影响还比较小，因为我们是自产自销的。像别人大规模生产，他积压了许多货。他肯定很难维持，我们这种自产自销，我们自己画的话就不会太影响。就是这么回事。生意比较难做。就是仿古，但是像名人名作好像还可以。就是创作性的，他不是仿古。就是搞个人个性，像画家一样的。可以随意画，像画家一样。他不需要什么边角，都不需要。他就是像现在有评名家呀，省高工啊，省大师啊。拿国家津贴的这些人。他们一般一幅作品可以一个人完成。

Jane: 那你们的家族当中，你说你母亲也在从事这项行业。
李: 对，她以前在瓷厂，但是现在已经退休了，拿退休金，所以她不用干活。她已经退休了。

Jane: 那还有其他人从事吗，还是只有你一个人在你们家族当中？
李: 我大姐也是画古彩的。然后后来他丈夫搞基建，就是包工头的意思。就是地方拿房子过来建。给别的承包商。所以她没有时间搞这个，那个利润大一点。（就是那个建筑的）。她丈夫搞建筑，她就没有搞。老二呢，画一点。

Jane: 那你们也是从爷爷那一边下来的，那平常的时候你爷爷爸爸就会手把手教你们。
李: 那肯定了。

Jane: 算是传承。
李: 有一点传承的味道在里面。

Jane: 那你们比较特别就是，没有什么同乡在做是不是？
李: 没有。他们都是属于独立性个人型的行为。他们不是带动家族的行为。像早些年，抚州人过来都是家族性的。他一个人过来，带他的小舅子，小姨子，父亲啊，弟弟啊，全部带过来。抚州人你可以去采访一下。他们是属于家族性的。一个人来，就好像南迁一样，全部来。估计现在就没有这种现象。现在陶瓷的利润很薄，在加上别人积压产品赚不到钱。现在要慢慢退缩了，好多人要退回去，回去种田。

Jane: 那这条街上有抚州人吗？
李: 这条街上有啊，樊家井那边很多。抚州人啊，景德镇人啊，都昌人啊都有。以前这个手工业很多人来，附近乡下的人来。现在经济萧条，没什么事做，还不如出去打工。所以说很多人现在不愿意学了。2000 到 2006，2007 是一个高峰，很多乡下人来学这个手艺。所以这
个队伍不断的壮大。但现在慢慢的要萎缩了。一般手艺的人他们要回乡下了。手艺好的呢，还是可以生存，比较精进的人，画得好还是可以生存。像马马虎虎画瓷器的，他没有什么瓷器画，就出去打工或者回家种田了。所以要淘汰一批人。

Jane: 所以从 2000 年到 2007 年市场逐渐达到饱和，对不对？

李：对，这是一个高峰期。瓷器比较好看，你做什么都比较好卖。但到了 2007 年，这也跟经济有关。像房地产好做，这陶瓷就好做。因为买房的人，他的位子大，那么他就可以买一点瓷器在家摆设一下。提高一下自己的修养。像房子小的话这瓷器放哪去，会打碎的，是不是？虽然它也可以保值，但它也是易碎的产品，也要好好的保存。所以它有一个极限性。房子不好卖，陶瓷也要差一点。这是我个人认为，并不是所有的人都这么认为。这就是我自己的见解。

Jane: 因为你们接触市场也是比较久一点嘛。所以各方面的人你们也是接触多一点。那像来的顾客有什么差别吗，你们这个算是仿古当中哪一个类型？

李：我们这个属于仿古的中档。也不是搞得特别好，也不是很差，是属于中档的产品。

Jane: 顾客的来源？

李：一般都是懂的人来这里买。不懂的人他不会来这里买。因为不懂的人以为你的价位好像很贵一样。懂行的人，买过的人才知道这个手工艺产品大概要这么多钱。还是卖懂的人，一般都是卖二手的。出去在外地开店卖你的产品。就是二贩子。

Jane: 就是有人做二贩子，对不对？那这些二贩子主要是从哪里来的？

李：有好多啊，北京、上海、江苏、哈尔滨全国各地的都有。所以不只是一部分，全国各地的人。有懂这一行的，他们开古董店的，有喜欢收藏这个的。

Jane: 像我们做这种集群的研究，研究怎样优化产业之间的互动，你觉得这样的研究对景德镇的陶瓷有帮助吗？

李：肯定有一定的帮助是吧，比方你说家族性的啊，比方说我这个，要做成型的人来给我做胎瓷啊，我卖出去以后别人也是要赚钱，然后带动一大群人，然后画瓷器的人到我这边来可以得到工钱啊。然后我租别人的房子，房东也可以得到那个房租。然后国家交税，做锦盒的人也可以赚钱。可以带动很大一群人。如果你这个产业，不只是你这一家倒闭，做成型的，做锦盒的，做房子的，一大群人都有连带关系的。所以经济肯定是一个链。

7.4.2.3.3 Interview 3: Zhang Shanqi, Shaojiwu, 20081012

Interview Transcription 3 20081012

地点：筲箕坞

对象：张善启

年龄：30

教育背景：初中毕业

职业：画陶瓷，自己画，自己经营
Jane: 你是一个人独自来景德镇创业的吗？

张：对，一个人来。

Jane: 请问你是哪里人？

张：江西乐平。

Jane: 那你来景德镇多久？

张：15年左右。

Jane: 那你有什么亲戚朋友在这里吗？

张：没有。

Jane: 就自己一个人来从学徒做起？

张：对。

Jane: 那刚才你有谈到说景德镇的陶瓷有一个很大的问题。你可以再重新描述一下吗？

张：景德镇的缺点就是在版权所有。版权上比方说什么东西好卖，你做，他也可以做，没有自己的产权。就是这个意思。

Jane: 就是很多人会仿来仿去。把市场给搞烂掉了。

张：对。就是这样子，最关键的一点。你像名人名作它有名字有版权的。你像这个仿古的，这个图面是我设计的，但是别人买我的陶瓷去，照样他自己可以做。他可以做跟我一样的东西，就是这个意思。

Jane: 那有没有什么法律的途径可以申请？

张：这根本没有申请法律的，跟你讲的，就是我们本身也会仿制书上的。我们现在景德镇，跟你说也说不清楚。我们自己也仿制书上的东西。何况是我们这个底款很多都是落仿古的。仿古就可以带一点仿制性的东西。别人仿我的东西，他也可以说是仿古的东西。这很多很多都很难说，现在很多东西都是这样的。只是说看谁吧。这个世界上还是有能力的人生意可以做好。就像你们一样，一个大学生，一个硕士生以后出来。他们每个人以后的机遇不同。就比如讲，像胡锦涛那样的。跟胡锦涛一个班的，为什么只有胡锦涛当主席呢？当这么大的官。就是看自己能力了。做生意也是一样的。同时都是从乡下来的人，有的可以做得特别大。因为个人有经营方式的不同。有的人瓷器画得好。比如一个大师，他瓷器画得好，不代表他经营经得好。像有的人瓷器画得不好，但他特别会经营。就像我自己，读书我根本就办，但要说谁的东西画得好，我有信心。对做陶瓷我特别有信心。比如讲做生意有什么计谋呢，我也不怕讲。但谈到读书，我就是没用。

Jane: 每个人的生存方式不一样。

张：你像我，读到初中，我现在觉得我的文化低了一点。高中毕业就好一点。也许高中毕业晚三年我就没有这个成绩，也是一样。就像你们大学生一样。就像经营景德镇陶瓷一样的，你们硕士生也越来越多。竞争性也越来越大。做瓷器也像你们一样，关键在于现在人才太多。就像你们硕士生，有的公司聘用你了，有能力的人还是照样把你比下去。他可以找到一个人换你。现在社会经济嘛。比如他雇佣你一万块钱一个，他的能力比你好，可能超过你。他要八千薪水，可能只要六千薪水就愿意干。我是老板的话，我会雇佣他，他的能力比较强，
比你的工资便宜。所以现在就是没办法。市场经济嘛。像你们这样，主要是写什么论文呢？

Jane: 我是研究景德镇陶瓷集群的。当做陶瓷的人全部在一起的一种经济模式，有产生专业性，之间的分工合作的特点。相对于不是集群的话就更明显。因为公司多嘛，所以那种互动的模式就有很多很明显的特征。

张：关键我们景德镇有的人做生意，他没有什么经营方式。比方说我们经营陶瓷，像我们出去，我是打上亏。亏与挣钱两个极度都要选择。像有的人到外地去。他一亏，他的瓷器就贱卖，便宜卖。比方怎么讲景德镇货拿了一百块钱。现在在外面卖一百，批发市场跟零售市场已经到了烂卖了。还有一个，他一百块钱的东西，到外面去标价，甚至标十几万，他最后卖价是什么呢？五百都卖，甚至两百都卖。根本就没有经营头脑，没有经营方式。

Jane: 没有一个规范。

张：没有规范，他们就像我们常说的杀猪。有得挣就挣一下。现在慢慢时间长了就觉得景德镇陶瓷在外面走向世界就有点走下坡路。不是他外面的人不喜欢我们景德镇的陶瓷，而是他不知道这个陶瓷有什么定位。是高档陶瓷，是贴花的陶瓷。有些高档的陶瓷在景德镇说一万块钱。他拿出去卖，卖个两万三万，有可能，那是正常的。一个贴花的，他在景德镇买就一百块钱，他在外面卖标，标个两万甚至有的十万。有的卖得好的，他卖个十万。他买个一万块钱，别人拿回家，发现是贴花的，就会很气愤。我花了一万块钱买你们景德镇的陶瓷，买了一个贴花的。你别说景德镇的人难管，每个人都有他经营的方式，没办法我要挣钱。可能我们做生意受这些人影响。不是他们不对，他们也没办法。他们也为了挣钱糊口。我们中国就是这样，本身就没有保底。他有得骗就骗。说的难听就是骗。有的人他不认识景德镇陶瓷，他又做生意在一起，说一起去做个展览，搞个展示。你是拿的贴花的去，我是拿的另一手的去，你在景德镇进货是三百块钱，我在景德镇拿的是五千块钱。在一个展销会上，你的标十万。有的人说你的标十万，我的也标十万。到时候有的说他的漂亮，你的不漂亮。他卖十万，你为什么卖十万。你不能说他的是贴花的。做生意我们不可能说你骗。做生意什么都很难管理。

Jane: 现在是不是缺少一个机构，专门来管理这个市场，和培训。

张：这样的机构，我跟你讲。社会是由人定的。政府越有机构，老百姓更难生存。你有用的人想怎么样怎么样，没有用的人你有一点麻烦他就找你。关键是在现在的机构对老百姓在社会上没有地位的人，对他们来用的。现在的法律也是一样的。就像景德镇，景德镇仿古的那款，有很多种打他就违法。他可以找你麻烦。如果是当官的人家做这个款，你会抓他吗？你要是找一个政府机构来规范这个陶瓷，说实话你帮助了家里有背景的人。最后呢还是没有帮助到需要帮助的人。

Jane: 其实不一定机构就是政府机构。现在也有很多私人的机构。

张：我跟你讲，现在政府的机构和私人的机构，现在已经到了经济社会，没有这种人，我说得难听点的就是没有这种人。我跟你讲。私人机构他也评关系啊。比如讲你成立这个机构，你找他人的麻烦，把谁谁谁的外甥女啊，把谁的侄女啊，算了别找她了吧。家里有背景的人还是逍遥法外。他想怎么样就怎样。

Jane: 所以你讲的是现在整个社会的问题。

张：现在怎样，还是跟你讲。这个社会呢，有竞争，就有进步。景德镇仿古瓷就是你仿我我仿你，景德镇的陶瓷更大竞争，也是差异。这样说啊，对生意上不好做，但对人的脑筋上是
一个最好的锻炼。就是更新吗，我不断的更新。我的生意还算起来快。别人一跟我，我马上就开始换。调转一种方式。做生意就是这样的。我每天做这种东西，没有人仿我的话，我每年的质量达标就是这样的，但是如果有人仿制我的东西话，就不断的要质量高，就会提高自己嘛。有竞争就会有进步。但是社会随着政府呢，也不好做。你说你要管理也不好管理。它是没有办法管理的东西。

Jane: 他是人文自己形成的一套规律，就是说，是不是一种社会性根植性很强的东西。

张: 对对。现在就是越做得大的人越好做。越做小的人越难做。现在可以自己直接到外面去，去了解市场。你像现在跑美国。现在我们中国陶瓷出口，己控制，不能去跑展销。把所有的护照收回，不能跑了。但是家里有背景的人，他在以前呢，在美国跑展销，认识华侨总会的谁谁谁，我们现在景德镇的人跑展销的直接就是美国护照，户口。他现在到我们中国来是华侨了。现在已经没有人了。他到景德镇来，他想跑展销，想跑就跑。你在景德镇，把景德镇跑展销的护照全部收回，他们生意更好做。上有政策，下有对策。是一样的。那生意谁的好做，谁的不好做也不一定。他们在生意更好做。你跑展销，他也可以跑展销，他们会用美绿卡，你拿不到。就好像读书一样，你可以考到，我考不到。像我，因为我学徒一样，很多的父母找我带他们的小孩，跟我学徒。他说你看我的小孩可以学得会不？反正我的回答都是，不知道。我永远说不知道。时间长了我就知道。那时候，我母带我去报名的时候，老师说你要进修博士，我肯定不会在这里。那没办法的，时间长了就知道。就像做生意。如果你坐在这里，有个看相的先生说，你以后可以做个特别大的老板。我如果坐在家里等，老板哪里来，还是考自己的努力。现在社会就是这样的，像你们写一篇论文就要考自己。比方说有个机遇好的人，他碰到一个什么都坎坷的，他说的经历就跟我们不一样。我说，你们市场调查，观察什么样的，比方讲你要学生证嘛。你进有的店，什么大师级的。随便跟他聊几句。那从上中下，一直聊。你在这条街上，找来找去都是差不多一样的。你们的思维就是在于一个街上找东西。

Jane: 之后我会在不同的地方找，包括文化博览区也会去一下，中国陶瓷城等等那些地方。

张: 你说我们做陶瓷只能是这样慢慢做，之前有一个台湾中山大学的学生，他也是搞经济的做市场调查。他们可能台湾吧，政府就跟我们不一样。他爱管理人才。我们这里跟你讲社会经济，企业贷款是给有企业的人贷款，而不是给没企业的人贷款。他企业越大越可以贷款。你看上去没什么用的人，没有积蓄的人，反而像货信贷款做生意反而贷不到。他生意做得好的人，他需要周转反而贷得到。但是就跟台湾那边不一样了。他做得差不多的人就可以企业贷款。但是他像我们乡下，就像他贷了款，很多人见到这个利益，很多人贷款不还钱。他说我亏完了，那我全亏了。其实他是根本不还你的债。现在政府也不敢随便贷款给别人。干脆就给那些企业有点形象的，他也知道你还得起。你像我们想做大了，贷款也很难贷。你要跟银行的人熟才可以贷到一点。我跟你讲，各种各样的人，这条街上，你采访谁，说法都会是不一样的。

Jane: 说法都不一样。

张：你觉得呢？

Jane: 其实还是有一些共通性的，就警方说现在的生意整体的情况就是比较不好做。现象一般都是仿制啊。

张: 就是跟你讲，我做生意理念跟别人不同。今年世界性金融危机也有关系，但是景德镇的生意好做。别的有的觉得不好，我心里还有点特别高兴。我跟你说，我心里，对生意来说，
我对我的生意可能还是一个最大的帮助。景德镇我们这个城市做生意，很多人只有经营做生意方面，管理，管财还是很厉害。有很多我们景德镇的人做生意他管财还是不行。我跟你讲，一个人做生意十万块钱他挣了二十万，他可能拿十万块出来买房子。你说做生意的钱，你动用一两万是没事的，但是二十万你动了十万根本就会动摇生意，受到这种波折肯定很难熬下去。你像我，去年别人劝我买房子，我很多的朋友都买了车子。我什么都不买。就像今年生意特别不景气，景德镇陶瓷特别不景气。但是，我觉得我还可以啊。我跟去年，我比去年的销售额还要增加。很多人生意在难做的时候，他就会尽量少做。但是顾客到这里来，今天是这个东西，明天还是这个东西，他可能就买得少。你像今年这个行情，就可能动摇了。但是像今年的生意这么难做就没有动摇我了。我可以说，我没有受到影响。

Jane: 所以你就是说你在质量上把关得很严格。

张：质量，产量。哪怕就是生意不好我不缩，生意好我就增。但是生意不好的时候，我还是这拨人生产，我永远不让工人回家。慢慢做，但是就是我管理，我不会动用生意上的资金买房子买车子。你像今年这个行情，就可能动摇了。但是像今年的生意这么难做就没有动摇我了。我可以说，我没有受到影响。

Jane: 所以还是看谁的生意做得好。

张：不是看谁的生意做得好。就是跟你讲你生意做得比我好，你生意做得比我早。比如讲你挣到一百万，我挣到五十万。但是就是这种做生意过后还要理财。

Jane: 就是说理财是关键。

张：对，有的人理财一下理得不好，他就会彻底的生意垮掉。就像今年金融危机一样，生意比较难做。什么生意比较难做。但是去年有一百万的人动摇了大概五六十万，七八十万来做房子，买车子。你认为你生意好啊，你认为你做陶瓷有个三十万就好了。你动用了六七十万，景德镇很多人做一栋房子五十万，买一辆车子二十万，你一百万就花了七十万。但是正规生意场上理财来说动用固定资金，顶多就百分之二十，一百万你动用二十万，你在生意上不会受到什么挫折。景德镇有很多人做一百万动用五十万的。做六十万的房子，还买了十万块钱的车子。三分之二差不多。比如讲他动摇了。他本来生意比我好，比我强大。但是他受到这种挫折。我五十万，我没动。今年生意不好，我可以跟他竞争。我的竞争能力比他强。比方说去年你是一百万，我是五十万。动用了六十万，现在我还多你十万。竞争，我可以压过你，我可以有选择的余地。现在我的工人一个不减，但是你动用了四十万，你的生意就会缩短，就会裁掉很多工人。裁掉很多工人你的生意就会越做越小。但是我是同样的那种人在做。可能我的生意马上就会在金融危机上超越你。但是我做生意我有这个信心。就像今年的生意难做，我觉得很多人支持不下去的人啊，他干嘛呢，他已经关掉门了，做不下去了。他在社会上已经竞争不下去了。

Jane: 就是优胜劣汰。

张：他优胜生存不下去了，我呢照样可以生存。就是太多的人才，太多在社会上竞争的人了。他会挤掉一部分。像九几年的世界金融危机，很多富豪跳楼。但过后有很多做生意的人在一两年之内发了，社会就是这种的。生意赌博就是这样的。一个企业家，有人倒下去毕竟有人起来。这是社会上的规律，就像赌钱一样有四个人，今天你赢了十万，明天你输了。如果有四个人，肯定到谁的袋子中去。社会也是一样，世界上有富豪在亏损，后面有谁在操纵，最后他就是富豪。我能坚持下去，将来我能竞争得过。
Jane: 一般你们在生意上会跟同乡人有来往吗？就是乐平人。
张：肯定有的。
Jane: 你们会以怎样的模式互动？
张：你像我本乡的人，有些时候我特别空闲的时候，生意压得大的时候，这些朋友在一起玩一下。回到以前学徒刚来的时候，回回以前特别没事的感觉一样的，可能跟他们聊一下吧。
我跟你讲，在社会上竞争，我接触的人肯定都是上等人。在生意上比我占优势的人我接触得比较多，他可以带动我。就像一个亿万富翁跟一个千万富翁。一个千万富翁问亿万富翁，你为什么是亿万富翁，你为什么有这么多财产，能挣到这么多资产。他就问他你，你平时在一起玩的人都是什么身份？他回答说，我玩的人都是千万富翁。亿万富翁回答说因为我的朋友全部都是亿万富翁。如果平时我丢掉生意不做，跟家里的人一起玩是很少的，除非特别空闲的时候，特别烦的时候去走动一下。因为我们现在社会上所接触的都是带一点利益交易。现在社会上的朋友根本很少有直接了当的知己啊。他的瓷器画得特别好，你为什么跟瓷器画得特别好的人玩得好呢？你为什么不跟瓷器画得特别不好的人玩得好呢？眼睛里面都是可能你瓷器画得好可能以后对我有帮助。现在你讲读书的人，你要读书，你像我们人，你现在是硕士生，你跟博士生在一起，肯定对你以后有帮助。比如你周围的朋友都是博士生，你过不了多久也会成为博士生。他会带动你。现在博士生的朋友都是博士生。研究生的朋友都是研究生。很多的。我现在回家，除了跟家里人来往，就很少了。

Jane: 就是同乡之间的互动比较少。
张：除非就是特别空的时候。你像聚会啊，我们都不去。我们在一起来的人有几十个人。几十个人现在有经济差异。有的人现在原地踏步。我们叫他，他觉得跟我们的距离拉长了，不愿意跟我们在一起了。就是有种距离感。

Jane: 所以不是你自己一个人，而是一批从乐平出来。
张：就是家里就我们单个人出来。我们不读书呢，眼睛里面就是这个学瓷器。以前画瓷器觉得很挣钱啊。都不愿读书，读了初就不读了，就到景德镇来画陶瓷。那个时候，跟我差不多大的，基本上都到景德镇来画瓷器。现在来得越来越少了，老早呢，前几年呢，我们在一起来往往比较多，现在根本就是他不太叫我们。像我们生意上比较繁忙。天天打电话给我，我今天没空，明天我很忙在赶货。一次两次你没去，时间长了他就不叫你了。现在同乡在一起，说得不好听的话就是现在生活上有的距离。就好像你读书，将来你的朋友是家庭主妇，而你有是事业的，他根本玩不到一起去。以前你们是铁哥们，现在她是家庭主妇，而你是白领阶层的人。你的生活什么都很繁忙，她有什么心事来找你，你没空。只有你有空找她，她有空。这样你就，说难听一点就是有距离感。但是你找她，她根本不愿意跟你聊。因为平时跟你没有什么互动。她不知道回应什么。你说什么她听什么。她说什么，你也不愿意听，她说什么公公婆婆的，你有事业心，你体不到她的生活，她也体不到你的生活。但是我现在做生意。我说生意的压力大呀。我说还没有以前画瓷器好。我们是怎么样想的？你现在做老板不好啊，钱挣到了又开心。他觉得我开心。我们觉得他开心。以前我自己画陶瓷，这个月挣三千块钱，下个月挣五千，再下个月挣五千，只想到自己的工资越高，像挣钱一样的。现在当老板挣到一万两万，看不透，还是少。你现在的压力比以前大。你以前挣三四千，有时间走动，你现在就开心的。现在你在生意上距离大了，上千万，几百万，你觉得你现在这个样子。现在自己的压力特别大。他自己的压力更大。我觉得以前做得挺开心的。做生意呢，就热捧。像你们也一样，做一个家庭主妇找一个丈夫，她也开心啊。有一种女人，她
的性格喜欢做花瓶。但有的人她不喜欢做花瓶。她喜欢做一个比男的还强的女人。这个想法是一样的。

Jane: 你们从做陶瓷到卖出去的整个流程是怎么样的？

张：其实景德镇就是分各种各样的。做白胎的有白胎的。我们只看什么好看的，我们就买。还有自己可以画一点图纸，叫别人加工。就是我自己设计了一件东西，我到现在还没有拿出来卖过呢。我觉得挺好看的，以后就留在家里算了。市面上没有。我觉得看得挺开心的。那个东西是这条街上也没有。所以我觉得挺开心的。有的人可以很开心笑到肚子痛，因为我自已叫别人做。现在还是一个白胎摆在家里。它是仿了一种东西吧。

Jane: 所以你们白胎买回来就打图？

张：就是自己画嘛。

Jane: 手工画？

张：你像我这里的东西，连最小的东西，全部的画面设计都是我自己。设计画面啊，都是慢慢设计。我这个上面所有的花型都是我自己设计的。像第一个画面都是我设计的。

Jane: 所以都是你自己画？

张：现在画得少，都是自己画。我的东西都是每个月更新。每个月都有新画面出来。这个画面做了一批，外面有人仿制，我就不做了。我就更新新画面。新画面做了半年以后呢，以前的东西再重新拿回来做。我喜欢走在别人前面。别人跟了我，我就不做。别人刚开始跟我的时候，我会半个月左右，我会扩大产量。我就可能在价格上优惠一点卖出去。在这个画面上比较优惠卖出去。但是我马上就不做了。别人仿制我的东西，比方说这件成了一百块钱。我以前比如讲卖一百五，或卖一百八。我现在是开店卖一百，做一个十天左右，我就卖一百二。那所有的顾客都知道这个东西一个卖一百二。你仿制我东西的人呢以为我以前卖一百五，卖一百八。他们马上就不做了。因为还价啊，小张那里就是卖一百二。所以他就不卖了。等他手上的东西全部卖空了。他也不会做了，没钱挣。当外面在找那个画面，你们以前那个那个还有吗。他说没没就没，不做了。我就重新把价位调整过来，再做。所以做生意有自己的手段，你不能慢慢来。所以说做生意不停的用脑子。像有的人别人在仿制，他他也跟着做，仿制也跟着做。像以前我刚一出来，有几家竞争。在这一条街上大概有十家竞争，跟我做差不多一样的东西有十家。现在只剩下我一家。他们都改行了，很多人都上班去了。

Jane: 现在我想问最后一个，因为我们是做集群的嘛，要优化景德镇陶瓷集群的整个氛围的话，会不会对景德镇的经济有帮助。就比方说筲箕坞，它有这么多家做陶瓷的，它本身就是一个集群。

张：我跟你讲，筲箕坞，现在政府不批。筲箕坞这个也是个陶瓷市场。政府就不批，就不允许你卖陶瓷。他在旅游册上，在网上就不允许你有。现在你要到市场去，我们这个营业执照他也不批。你们现在交税可以交，照他不给你发。你现在集群，可以啊，我是一个开发商，我在陶瓷城，尽量把你这里赶走，弄到我陶瓷城。以前有赶市场，以前我们江西有这个地方赶市场，就是把整个市场全部赶去，赶到一个地方去。当叫城管赶市场，有个老板可能就是装修花得特别多的钱。他就是赶赶赶，弄坏了他的东西，他就请很多社会上的人打死了一个人。打死了人以后就不敢赶市场。刚开始这个市场也要赶走的。几个月之内，这里不能有卖陶瓷的。他就是让开发商投资。这里有很多发了神经一样的买了陶瓷城的
房子。现在陶瓷城的房子买下来个七年八年，现在的房租还是三百来块钱。商品房租几百块，旁边的地方两百块钱一个月租给你。他投资几十万买了一个店面，连利息都租不到。

Jane: 所以陶瓷城那边的经营者多吗？
张：现在多啊。现在各个市场自己已经在慢慢的推走，生意模式不行了，他慢慢的往那边走了。那边强行赶梭子窑。你赶了这个梭子窑，你这里不能烧制了。樊家井照样在烧。他们为什么赶不走樊家井呢？政府就是不公平啊，赶这里为什么赶不走樊家井呢。樊家井就很聪明。赶他们的时候，老百姓就叫那个村庄六七十岁的老头站到前面去。谁推倒一下他坐在地上就不起来。有个老头弄他的梭子窑，弄倒了，他大概市政府出钱住医院大概住了三个月。他们一来，就叫全村的老人，一人花一百块钱叫他们去丢了。你为什么拆了这边的梭子窑那边不拆呢？现在樊家井特别好，这边越来越不行了。梭子窑也有关系。现在做生意政府办点怎么办呢？樊家井的人，比筲箕坞的人多谁炸死过，古代到现在也没炸死过几个人。他现在就想把你的市场捣烂，为什么呢，现在好像叫瓷都园，（新都民营陶瓷园），还专门有一个梭子窑的开发商在那里开发，把你赶走想叫你在那里买房子。市真政府赶市场是有目的的。他赶你走，想你到那个地方去。因为别的开发商在那里投资让你买嘛。想这种市场的模式没有一定。你几个市场还好啊。以前筲箕坞，就想全国各地的人也都是知道景德镇有一个筲箕坞。现在筲箕坞已经不知道了。集体化的规划对大家也不好。现在集体化的东西都这样，房子卖了。除非政府的房子不卖，有规定的价格。像陶瓷城，规划市场也只有对生意做得好的人有帮助，做得差的人没有帮助。像国贸一样，它店面好的一个月有六千。有的人连租它的店面都没办法。你规划还不是害人。生意也不是不好规划，也就是集体到那里去了。但房子，有钱的人上几十套的店面，房价特别涨，猛涨。这样还是好他们，一样。樊家井我这个店面，现在已经到四千了。我现在呢（房租）是一千多一点。如果我这里，政府来规划这里，我们这里的房价猛涨。所以市政府除非有规定的这个房价多少钱一个平方，这条街什么价，第二条街什么价。现在已经是乱涨价了。

Jane: 其实政府很难规范那个价格。
张：陶瓷最不好的地方在于，我的陶瓷跟你的陶瓷不一样。我们两个人公用一个店，比如讲，我这个店是一千。我们两个人一个月五百。便宜得很，一个月五百。到房子涨到两千，我找三个人；四千我找四个人。他最后还是一样的。景德镇的市场不好规划就是这样的。樊家井就是这样，它到了四千以后，他就搭货架。他整个货架给你七百。它的店面大家都来涨。如果一个老板他撑不住，说我不租了，它房价就涨不起来。我一个人不租，我两个人租，两个人不租，我三个人租。因为陶瓷很多东西不一样。就像买卖服装一样，裤子是裤子，衣服是衣服。瓷器我做花鸟的，你做人物的，很多人不一样。现在世道不好，社会不好。我相信的是现在越到低谷，回头越是顶峰。我有这个信心。也许你见到不到我，也许十年后我会是个大老板，我对我自己有信心。今年的生意别人扭着手做我还放开手做。像这次跑国外的，我压了很多大件的陶瓷，一个人买了七八十个走。如果有人生意不好他就不敢做。

7.4.2.3.4 Interview 4:N/A, Fanjiajing, 20081013

Interview Transcription 4 20081013
地点：樊家井
对象：手工业作坊 女
年龄：28
教育背景：初中
工作：卖瓷器
Jane: 你是不是单独来景德镇创业？
女: 没有，我有爸爸妈妈，还有我老公。
Jane: 那你是不是景德镇当地人？
女: 不是，我是九江都昌的。
Jane: 你是否有很多亲戚在这里从事陶瓷产业？
女: 对，我那边的人好多都在这里工作。
Jane: 那请问你来了多久？
女: 我来了几年，我爸爸妈妈来了十多年了。我以前在外面打工。
Jane: 那你们在生意上会跟同乡都昌人很多互动吗？
女: 有啊，像我老公的哥哥都在这里啊。
Jane: 那你们一般会有很多交流吗？
女: 什么叫交流呢？
Jane: 像你们在生意上或者在亲情上有没有交流？
女: 亲情上有，生意上一般没有。各人做各人的，一般那样。不会有什么交流的。
Jane: 那你们这边生产，都是自己画的吗？
女: 对，还有有的请人啊。像我会画啊，会雕刻啊。要会懂才能生存下去。
Jane: 那你们在生产的过程中会跟很多人来往吗？像卖白胎的啊。
女: 对，那些人，卖白胎啊，卖釉料啊，我们胚啊，釉料啊，都是在那里买。
Jane: 那你们会不会特别选择同乡人去买吗？比方说有同乡卖白胎，卖配料你会不会选择跟他们买？
女: 那当然会咯。
Jane: 那你们生意上往来的人会不会都是都昌人？
女: 那不会。那也要看，不说都昌人卖啊，还有就是谁的东西做得好我就买谁的。就是那样的，我们要谁的东西精致。如果卖不出去，就是跟同乡买来也是没有用的。
Jane: 就是同乡的关系虽然有，但竞争的话，以质量为主。
女: 对对，就是质量第一，主要还是。

7.4.2.3.5 Interview 5: Mr. Gong, Fanjianging, 20081013

Interview Transcription 5 20081013

地点：樊家井
姓名：龚先生
年龄：35
教育背景：高中，后自学
工作：卖陶瓷，从事生产和销售，自己学是一门手艺，自己做，自己销售，像我货架上的东西都是我自己画的。等于是自己创作的东西嘛，自己销售。按照这种说法是，家庭式的小作坊。
Jane: 那你们平时请人吗？
龚: 这个我们平时不请人。既然属于家庭式的嘛就不请人。就是自己家里人，比如我夫妻啦。
Jane: 所以太太也有参与到生产过程当中。
龚：对对。像我夫妻都是从事这个的。都是从事陶瓷生产的。
Jane: 那请问你是自己一个人跟太太来景德镇创业的吗？
龚：本身学的就是陶瓷这个专业。所以毕业以后就很自然而然的从事这一行。
Jane: 那你有其他亲戚朋友在从事这一行吗？
龚：不多，我家里人原先是在厂里面做事。跟这一行没有多大联系。只是说我们这里是这样的，就是有亲缘跟血缘关系，会带动一些亲朋好友来从事这一方面的。比如像我，我今天已经学出来了，在这个产业有十多年。因为我高中毕业就做这个。那个时候有18（岁），到现在有十多年。中国人的习惯也是这样。我学出来以后，我家里有什么晚辈啊，或者亲朋好友的子女他（她）读到初中或高中毕业，他（她）不愿意读书了，家里人肯定要给他找一条出路。中国人喜欢做什么啦，就喜欢有一技防身。是不是，学到一门手艺，以后生活就没有问题了。他主要就通过亲朋好友有什么手艺，然后带自己的小孩去学。中国人就这样习惯。譬如我，我的兄弟的子女不愿意读书，肯定要找我，有亲人有这门手艺，带他出来学这们手艺，然后再从事这门行业。就是亲人带亲人，这样一直带。这是一种习惯，一种血缘和亲缘联系到一起。这种按照现代的说，原先古代即使带过来也是师徒关系，又是亲戚关系，那样比较全面的交托这门手艺。
Jane: 所以你是景德镇本地人吗？
龚：我是本地人。我们原先景德镇的古城，以都昌人为主。现在以抚州和都昌人为主。都是靠近景德镇的，周边县市嘛带过来的。抚州人原先是做这个的，后来再到这边来。近十几年再到这边来的发展的比较多。到2000年左右以前都昌人经营这个的多。这个就是地域性比较明显。
Jane: 那你做生意会跟那些人有互动呢？像拉白胎。
龚：我们这个做陶瓷分很多种的。他不是每个人每一种都精通。做胎的是做胎的，绘画的是绘画的，上色的是上色的。这个做是的，还有包装的，有些，每一种都会分成若干种。白胎又分成很多的工种。有专门做泥的，有专门拉坯的，有专门利坯的。对不对，它又分得很细。三百六十行嘛，它分得很细的。每个人只能做好自己那一种，不可能样样都会做。
Jane: 所以你们在做自己的生意也要跟很多人有来往对不对？
龚：对，肯定啊。比如我原先学这个手艺的。如果我不做这个生意，我要跟卖瓷器的老板发生关系。因为他要找我做啊。我要帮他做啊，对不对？然后我做的时候需要一些工具啊。像我们做陶瓷的有各种各样的工具。笔是一种，有专门制笔师。原先我们这里有专门的毛笔厂，生产这个瓷用的毛笔。对不对？还有油，因为画瓷器它要用到油料嘛，各种各样的油料。釉，又是一种，它是属于化工之类的，颜色和油料它们属于化工。跟不同的人打交道。
Jane: 那你是会固定跟一些人买，还是你看哪一家的质量比较好？
龚：那肯定是选好的。先选好的，在选择跟谁固定打交道。我不可能一开始就就知道你的好。通过自己学的时候可能买的，可能买的，通过实践我知道那一家的好，再确定跟谁经常打交道。
Jane: 那你买卖的时候会不会特别挑本地人。
龚：那个不会。那不可能做生意很自然的。比如我在这里卖这个瓷器，你作为顾客来买，我就卖给你。别人来卖我也一样要卖。就是这样的，只是说顾客有大小嘛。买的货物有多少。就是这样子的，只能这样子区分。我不可能根据顾客来区分我卖或者不卖，那是不可能的。

Jane: 那你刚才说你有一些亲戚可能会把小孩送到你们这里。那这些亲戚一般是农村的，还是城市的？

龚：都有。这个不一定。

Jane: 所以你们祖籍就是景德镇人吗？

龚：不啊，我们外地的人多，像我们有抚州的都昌的东从的南昌的。反正周边县市好多。基本上都有。只是景德镇以陶瓷为主。他们送到景德镇的目的就是学陶瓷。如果是宜兴的话，他肯定是去学陶，陶艺，对不对？这是很明显的地域特点。如果送到浙江的东流，那肯定是学木雕。这个是带有地域性的，就是这个地方有什么样的工艺，生产什么东西，他自然把人送过去学那个地方的特色产品，特色工艺，是这样的。

Jane: 那你觉得今年以来生意好做吗？

龚：今年生意特别难做。

Jane: 你觉得原因主要是什么？

龚：这个怎么说呢？从大的方面来看呢，是同大的世界经济挂钩。美国今年这个经济嘛不景气，影响到整个世界经济。中国也是一样的。中国也是世界经济中的一环。他不可能单独存在，不受影响，那也不存在的，是不是？那跟世界经济是有联系的。特别是像我们这个陶瓷，它是属于高档消费品，是在人们完成日常生活所需之后多余的钱之后用来装饰自己家庭用的，是属于一种可有可无的。人们有钱的时候可以消费，如果人们自己金钱紧张，赚钱不易的情况下，别人就可能不会在这方面花销很多。这个肯定是有很大的联系。

Jane: 尤其是景德镇，它的很多的消费群体还是在海外。

龚：对对对对对，有！像我们这里的瓷器销往的地方都是，我们自己是生产啊，然后通过来这里做生意的有很多人，有本地的，也有外地的，还有在各全国各地，各个大城市开店的人，他到这里来抢货。你像特别是沿海像福建，广州，厦门，香港的客户，他们也到这里来抢货。你们那边的人，通过到这里来买再卖到国外去。

Jane: 就是转手，转二手。

龚：八十年代的时候叫倒爷。后就叫二贩子。这个在改革开放就很正常了做生意。

Jane: 以前倒爷做二贩子的抚州人比较多是不是？

龚：这不一定，只是说抚州人从事做这一行业的人比较多。因为他们祖祖辈辈都是这样子嘛，做生意为主，也不是说他们不务农。因为这是根据它地方特点来的。比方他的父亲是做生意的。他儿子长大了，他自然而然的想要把自己的儿子带上这条路。

Jane: 所以你是说，现在抚州人不一定是做倒爷是不是？

龚：对对对。全国各地都有人做生意。全国各地都有人，只是根据它的地域特点来的，做的人多还是少。基本上各个城市做生意还不是这样，对不对？所以在我这个地方做陶瓷的，我看见的做生意的抚州人比较多，做手艺的都昌人比较多。
Jane: 那你们这条街上的哪种人多？

龚: 抚州人多。你可以听他们说话，分得出来。做手艺的都昌人多。因为都昌人来这里学手艺的多。亲戚带亲戚，朋友带朋友。

Jane: 他们说画图的有画图的，分工很细致。

龚: 有的画，上彩的，各种各样，分得很细的。

Jane: 有听说都昌人较多是画图案的，对不对？

龚: 对对对。也不是光指都昌。他是特指某一个县的，比如某一个乡，比如这个有一个人出来学画图案的，以后别人找他带徒弟的话，肯定也是教他徒弟图案。他不会教他其它的呀。因为他自己的知识就是学那个图案的。如果你像我，我学的是人物，如果我的亲戚朋友找到我，跟我学徒肯定也是人物啊。因为我学的就是这个专业，不可能教其它的。如果他带的徒弟越多，那这个地方画图案的人就越多。

Jane: 你说分工很细，分工的话地域性也很强是不是？

龚: 嗯，但也不特别。也可能这个乡，那个乡我有亲戚关系，他们到我这里学徒，对不对？

Jane: 所以这有裙带关系，对不对？

龚: 对对对。是这样的。这个不特指的。不特指非要是一个地区学图案的非要学图案。是根据你学的师傅是学什么的。

Jane: 比方说樊家井这边有没有什么同乡会，比方说某一个地区的人他们有一个组织。

龚: 这里没有。那种同乡会在我县近现代已经不存在了。像民国的时候比较多。比如那个时候实行会馆制嘛。同乡啊，抚州啊，他可能到抚州人比较多的地方。它就有一个抚州会馆啊，什么的，都昌会馆啦。像国外啊，唐人街啊。他那个可能还存在。国内现在很少了。国内现在基本上没有了。

Jane: 那平常讲大一点，比方说都昌人，抚州人，他们会不会形成一个势力范围？还是说每个人都是做自己的生意？

龚: 就像你说的，我们都是亲戚带亲戚朋友带朋友。在这里肯定形成一个地域性。像这边抚州人做生意多，他们都是认识，都是亲戚嘛，肯定都是住在一起，做生意嘛，肯定会互相关照。这个很自然的。就好像如果你的亲戚朋友住在一起，有什么事肯定也会互相关照。虽然他们不可能有同乡会那种组织形式，那种没有。中国人那种习惯在那。这个说也说不太清楚，反正你能理解。他不一定有固定的组织形式，比如就像亲朋好友之间的血缘亲缘的关系形成的。

Jane: 那我是研究景德镇陶瓷产业集群的。这个产业集群就是说这个相同的产业，相同的企业，性质相同的企业，比方说做陶瓷的企业聚集在一起，它所产生的社会现象。我们是做优化的，我们要怎么样优化群体的互动。比方说它跟辅助产业的互动。他们之间的互动是个竞争及合作的关系。或者是只有分工没有合作的关系，我们是研究这一块的。那你觉得说这方面研究对景德镇的前景有帮助吗？

龚: 应该有。因为像我们这种小作坊，每个店里面都是个体私营的，都是个人生产个人的。比如我会做什么我就做什么。没有什么互相的联系，很少它不像那种大企业，大公司，或跨国公司，它可以出材料，生产一直到销售一条龙的服务。它都有专门的人做。像我们自己做，都是我自己做，从这个进原料，进胎，制作，到烧成，到销售，都是我自己一个人在做。
这不可能形成大的企业集群。这种一般要通过政府机构。如果政府机构它愿意，只有政府机构可以做成这样的事情。像我们个体私营是不可能的。

Jane: 其实也不一定是个体私营在做，这种现象是自然而然的，社会性的现象，比方说这个地方已经是集群成市了。比方说这里形成的是花鸟市场，那很多人卖花鸟的就会到那个市场去。比方说这里的话是陶瓷市场，做陶瓷的人就会蜂拥而至。
龚: 那还是小家庭生产啊。形成不了集群的数量。就像我们这条街。别人买单个少量的瓷器买得到，比如你要买多呢，要单个大的企业来生产。比方说他看重了这个瓶，他说你给我生产一万根。我们就根本不可能生产得出来。对不对?
Jane: 对。如果中间有合作的关系……
龚: 有合作的关系，别人针对这个瓷器要的就是这个产品。你请别人来做，不可能做得一样的。是不是，他画、彩，画面都达不到一样的要求。他就像那个工厂，那个大企业，是流水线生产的，生产出来的东西肯定是一样的。
Jane: 其实不同的集群，它的现象也不一样，比方说这个是仿古瓷，是属于艺术类的，欣赏的，你不可能一个人想要一万件……
龚: 我们这里还是有，有一些老板从外地到这来，他做东西呢相当于一种企业话的生产。比方说这个瓷板，它请人来做，他不是说一个瓷板就一个人做，好几个人做。人物一个人画，这个石头一个人画，这个树一个人画，每个人只做一步。等于说生产出来的产品就是一样的。而且能够形成数量。
Jane: 还是有这样子的顾客，是不是?
龚: 有有有。
Jane: 那我真的是不知道。我以为做仿古瓷的话，一般为了鉴赏。所以一般要的量不会很大。
龚: 不不不，那个有要量非常大的。所以那个就需要有大的企业或政府机构来组织。形成大的企业才能够生产出数量更多的产品。像我们景德镇有这个十大瓷厂。现在没有了。原来他们是以日用瓷生产为主，艺术瓷也有。像原先十大瓷厂，艺术瓷厂，它就是专门从事陶瓷彩绘的。原先在莲花塘。都倒了。
Jane: 是私有化了，还是……?
龚: 都倒闭了。
Jane: 在金昌利，有些人说他们是
龚: 全部都是私人的，现在没有所谓公家的。
Jane: 没有国有企业?
龚: 基本上没有。国有企业全部倒掉了。
Jane: 那你有听过红叶牌吗?
龚: 那些都是私营的，都是大老板，他们是属于日用瓷，不是属于艺术陈设瓷。它生产的是碗啊碟啊。属于日用陶瓷范畴，不属于艺术陶瓷。我们这个是属于艺术陈设瓷。
Jane: 最后一个问题：你自己一个人租一个店面吗？

龚：不是，这里自己一个人租一个店的很少。你可以看到货架的形式都不同。

Jane: 一般都是合租的？

龚：比如一个店一个人租下来，我们进来后就搭个架子。

7.4.2.3.6 Interview 6: Mr. Zhou, Fanjiajing, 20081013

地点：樊家井
人物：周先生
年龄：26 岁
教育背景：初中毕业生
工作：搞陶瓷的，经营陶瓷的

Jane: 你们是自己画自己卖吗？

周：一般都是自产自销。

Jane: 那请问你是否单独一个人来景德镇创业的吗？

周：一般是我自己先出来，然后把家人带出来。

Jane: 请问你的祖籍在哪里？

周：九江的。

Jane: 你就是把九江的亲戚带过来是吗？

周：就是我的家人啦。

Jane: 那你是不是有其他亲戚朋友从事这个行业？

周：就是我叔叔，还有其他亲戚，一个村庄的不算吧，同一个村庄的也有几个。亲戚啦，就一个叔叔，跟我差不多，就是釉上粉彩的。

Jane: 那请问你来景德镇有几年了？

周：有七年了。

Jane: 你在生意上会跟九江人比较多互动吗？

周：搞我们这个釉上的，一般都是我们九江都昌那边过来的。我们就是一个乡一个县，就是亲戚带亲戚，朋友带朋友，带过来搞这个陶瓷的。

Jane: 那会不会这个乡，跟这个县有技术上的差别？

周：那肯定有啦。还是早一点来的人技术好一点。我一开始是搞那个画瓷器的，绘画的你知道不知道。有点那个经验就开始搞作坊之类的，后来慢慢搞起来的。一开始是画瓷器的。
Jane: 我是说不同的乡镇，它画瓷器的类别是不是有不一样？

周：有啊，比方我家里，一般相对面比较多的，像我一个乡啊都是搞粉彩的。像波阳啊一般都是搞雕坯。那个比较多。一般都是一个乡，亲戚带亲戚。我是搞粉彩的，搞釉下的，把亲戚带过来肯定是搞那个的。总不可能搞别的东西。

Jane: 那你们同乡之间经常有聚会吗？

周：一般有啦。朋友在一起有时候聊聊天啊，到我家里去玩啊，有时候到别人家里去玩啊。一般朋友亲戚都会走动的。

Jane: 那你们在平常的交流以外，生意上会交流吗？

周：一般有，有啊。

Jane: 那你们一般是参与绘画这部分，还是参与拉胚等全部都是自己做？

周：一般都是家里，釉下的，从拉胚到成型，全部做出来，都是自己做的。

Jane: 所以你们不是像一般的红店，只是跟别人买白胎。

周：一般需要的话，造型比较好看的话，那还可以买啦。把那个胎子买过来自己加工。比较好一点的。一般普通的我们做得多，顺手的话就自己做。都是自己做坯。釉上粉彩，烤花炉烧制啊，都是自己烧制的。

Jane: 所以你们也有自己的炉？

周：是啊是啊，有。

Jane: 所以你们还是做得比较大的？

周：还可以吧。

Jane: 因为一般的店都是买过来，然后给别人烧的这样子。

周：也不是，一般生意做得比较大一点的，就是把别人做的，转手，在景德镇卖。之间多少赚一点。生意做得大一点，价钱一般卖得比较高一点。我们自产自销的，一般都是多少赚一点手工钱。有的人把这个运到广州啦，河南啦，北京，上海那个大城市，运到那边去卖。一般都是从景德镇运过去的。

Jane: 因为你们整个过程都是自己生产的，所以是不是说你们跟其他群体的互动会比较少。

周：你是说同行吧，同行一般怕仿制，模仿别人的东西，一般会有点，但不完全是那样的。那个陶瓷里面都是五花八门的。仿制的有是有，但不是那么多。就像朋友啦有些到店里面来看一下啦，没什么。这么多东西一下也仿不了这么多。大致都差不多都会做。做得顺手的话，像我们这样成本啊，颜色方面的效果，烧制效果的话都会好一点。像别人仿啦，这个拿过去也不一定能仿得出来。就是同行都不一定仿得出来。就像我们搞这个门，也许你卖的价格，我做都做不出来。都是这样的，你像我们搞陶瓷都是这样的。我做得出来，卖一样的价钱别人不一定能做得出来。因为这么多年，做得比较精，时间长了，成本这些东西呢，可以省下来。工序可以省下来。都不多，都跟你们那是一样的。因为市场经济，时间长了，肯定要精细又好。

Jane: 听说一般有画而不填，填而不画。
周: 有啊，青花就不用填啊。像我们这里一个人是用一个货架，那他们两个人是用一个货架，一个货架两米。这个货架也有几百块钱。像我们这里都要好几百块。

Jane: 那你有没有一些地方需要请人来画?

周: 有啊。家里有人画，全部都是请别人画的，但是我哥哥啦，一般的亲戚都会画，有些东西我给他画。

Jane: 所以你都是请自己人画的?

周: 外面的人也有啊。都有。需要的话就请别人画。有些东西我家里人没学过那个东西。就是给别人画。可以自己家人画的话就自己家人画。

Jane: 所以说你们在生产的过程中还是跟不同的群体有很多的互动。有些工序你们不擅长就请别人来画。

周: 有啊。

Jane: 所以你就这个货架?

周: 这两个都是我的。

Jane: 那你最近的生意好吗?

周: 还可以吧，奥运会的时候不那么好，最近这段时间还可以。

Jane: 那很不错啊，有很多店都说有受到金融危机的影响。

周: 有啊。这个有时候我也说不准，有时候生意淡，有时候生意好。相比前几年肯定难做一点，也不知道是怎么搞的。像我的生意还是可以的，像一般都是销不出去。还可以吧。景德镇不像以前那么好做。现在不好做。比以前肯定差一点。

Jane: 你是自己一个人租一个店面吗?

周: 不是。我刚刚不是说了吗，这一个店都是四五个人的。一般生意做得大一点的都是一个店面。像我们自产自销的有的是两个货架，有的是一个货架，有的是半个货架。都是那样的，自己做然后拿过来卖。

7.4.2.3.7  Interview 7: Mrs. Yu, Fanjiajing, 20081016

Interview Transcription 7 20081016

地点: 樊家井

姓名: 余女士

年龄: 49

Jane: 那你从事这个仿古瓷有多久了?

余: 从我从厂里出来到现在有十四年。

Jane: 所以你的工作是在这里看店吗?

余: 我自己也会画，也会雕。有时候在家里面也会雕雕画画啦。现在眼睛看不到，反正就上
上班，看看店呗。

Jane: 你刚才说你是厂里面出来的。

余：我是建国瓷厂的。我九一年就调出来了，离开了瓷业。

Jane: 那你们现在所经营的是以什么为主。

余：是以仿古的高温颜色釉。因为颜色釉是我们建国瓷厂的特点。我爱人以前在建国瓷厂是专门搞釉的。他是学釉的。

Jane: 那其它瓷厂有什么特色？

余：那像景德镇几个瓷厂，建国瓷厂是以高温颜色釉的啦，艺术瓷厂它就是高档粉彩啦，人民瓷厂就是青花啦，红光瓷厂是玲珑。这是代表我们景德镇瓷器的四大特点。你像高温颜色釉，青花瓷，粉彩瓷，玲珑瓷，这四大特点就是景德镇的……再一就是雕塑瓷厂，还有一个雕塑瓷。218

7.4.2.3.8 Interview 8:N/A, China Porcelain Town, 20081018

Interview Transcription 8 20081018

地点：中国陶瓷城

姓名：无名 Anonymous

Jane: 在中国陶瓷城有多少家厂家在这里？

无：在中国陶瓷城大概一两千家。

Jane: 那它们从哪里搬过来的？

无：一般是从金昌利那边搬过来的。还有一部分自己家里开作坊的。

Jane: 像你们的目标都是以旅游的为主吗？

无：对，一般是以旅游业为主。像一些小东西都是潮州瓷。

Jane: 就是说瓷器的话以潮州瓷为主。

无：对对对。

Jane: 景德镇的陶瓷也有一部分是不是？

无：景德镇自古以来，就生产那种青花，高档工艺瓷。一般不生产那种小件的，雕塑瓷还有工艺瓷。

Jane: 所以工艺瓷和雕塑瓷很多都是从潮州调过来的？

无：对。

Jane: 那你们这边的厂家做仿古的多吗？

无：蛮多的，但在这里吧不多。基本上都生产日用瓷。

Jane: 可是我看到蛮多店都有青花的。
无：青花不代表仿古的。

Jane：它可能是贴花的？

无：它可能也有现代的。

Jane：所以它没有仿古的款式，是现代的青花。

无：对。现在好一点的像青花浑啊，还有青花浑水啊。都是现代的青花不是传统的青花。

Jane：那你来这里做生意多久了？

无：我来这里半年。

Jane：你就是帮忙销售的。

无：对。

Jane：那这间店主要销售什么？

无：以我自己的店来讲，我一般销售精品的传统景德镇陶瓷。釉上粉彩啊，釉中彩，青彩啊，然后就是青花。现代青花以墨彩、青花浑水为主。

Jane：所以这间店是你自己的？

无：对。

Jane：所以这些货都是跟别人调的，还是自己作坊做的？

无：一般好的货都是请那种大师帮我画的。

Jane：那你有作坊吗？

无：一般自己没有作坊。但是有炉。小型的电炉。产量并不高。

Jane：所以你自己也有生产？

无：嗯。

Jane：那你一般是怎样的一个过程，先买白胎？

无：先自己买白胎，然后就是说做精品陶瓷我们一般就是说要求购买白胎，一般都是那种手工的，手工拉胚的，精品的。泥质要求是高白泥，釉色要求是高白釉。

Jane：那像你们一件卖起来利润还好吗？

无：在陶瓷城并不怎么理想。因为很多人并不怎么识货。

Jane：所以价位会压低是不是？

无：对。事实上他们不能理解我的东西为什么会停留在这个价格上。

Jane：其实你的价位是挺合理的。

无：对。

Jane：那像这样一个店面在中国陶瓷城要多少钱？
无：二十一万。

Jane：我是说月租。

无：像我这间店月租大概是一千块钱左右。因为这间店是我自己买下来的。

Jane：这个店面有多少平方？

无：有四十平方。

Jane：所以这里店面的价格都差不多吗？

无：有点波动。一般怎么说，我这家店一般旅游车会经过，是头街，一般是一千块钱。如果是尾街的话大概三百块钱左右。

Jane：所以一间店大概这么大的。

无：对。

Jane：所以波动还蛮大的，差价有到七百块。

无：可以说陶瓷城这个地方很多地方都不够成熟。比方说我们前面五排吧，五排店面都在做生意后面大部分都拿来做仓库，住宿。因为这边租赁便宜。甚至比街上的民房便宜一点。但是这里的房子又比较好。质量很好。

Jane：这里空的店面多吗？

无：嗯，蛮多的。就说后面两到三排基本上都是拿来当仓库用的。就谈不上是店面了，就是仓库，拿来压货啊，放货啊。要嘛就是用来做餐具批发，在网上销售出去的。

Jane：像你这间店现在维持得怎样？

无：维持得大概就说一千块钱到一千五百块钱，应该说是利润吧。

Jane：这样也算是不错了。

无：也不怎么理想，就是说汶川没有地震的时候，像这样一家小店专门销售旅游瓷其实一个月可以挣到两千到三千块钱。

Jane：像樊家井那边都说今年的市场不怎么理想。

无：对对对。整体陶瓷下滑。

Jane：又加上说金融风暴吧。所以大家就感觉到这种压力。所以樊家井有些店面就感觉做不下去了，就有的急于改行。

无：对。一般像樊家井那边都是做仿古瓷，要不就是接订单的。有订单的人还有办法生存，没有订单的人根本无法做下去。要嘛就是像我这种不用养家的人，可以生存得下去。

Jane：如果一家子很大的话，他就很难生存下去。

无：对。如果是卖陶瓷养家的话就不能生存。

Jane：所以中国陶瓷城卖仿古的比较少是因为市场没有起来，是不是？

无：对，一般来这里都是做旅游瓷的。来旅游的。一般旅游的东西分什么：潮州的，潮州那
种贴花的。一百五十件的花瓶啊就比较好卖。

Jane：但是他们就是当成景德镇的来卖对不对？

无：对对对。但是真正景德镇的，他们买得比较少，不怎么识货。

Jane：那怎么说，如果别人都是卖假的，你是卖真的，你怎么处理顾客的情绪？

无：一般到我店里面来买东西的人都是比较懂行情的人，就是懂货的。就会到这里来买。要
不就是捡货到上海那边去卖的。

Jane：所以中国陶瓷城还是有一些人来捡货？

无：对对。

Jane：一般捡货的人都会到樊家井那边去？

无：那是卖仿古的，像筲箕坞。我卖的是现代的陈设瓷。

Jane：那你了解锦绣昌南吗？

无：不怎么了解，但是有听所过。

Jane：他们那边主要卖什么瓷器？

无：他们那边也是主要以现代陈设瓷啊，旅游瓷为主。

Jane：那你这边的顾客群体最主要以哪些群体为主？

无：广州的。广州的一般会买茶具。

Jane：那你茶具是给别人拿的还是自己生产的？

无：一般是拿别人的。因为我们这里很多，因为在陶瓷城嘛，生产茶具然后再开店。

Jane：然后你就给他们拨过来？

无：嗯。

Jane：那这些瓷板也是你定做的吗？那它的价位是多少？

无：像这边是贴花的，贴花的价位一套在七十块钱，但是你开价一两百块钱还是卖得出去。

Jane：所以就是实价是七十块，你开一两百块让别人有空间可以还价，是不是？

无：对。你像这边就是好的大师画的。像这块墨彩的山水画他是张锡律（音译）大师画的。
是个北京美院的老师，是用刀画的。这个价位就比较高，大概卖到三四千块钱。

Jane：所以就是说各种价位的你都有，对不对？

无：对。

Jane：那你觉得这个市场什么时候会回升？

无：我觉得一两年以后。

Jane：所以你有这个信心？
苏：要来做出来美。有时候做不好的话就不要了。我都做了三十年了。我是七九年开始做的。
我七七年就是高中毕业。中间做了行政工作做了几年。

Jane：你一天可以画多少个瓶子？
苏：画不了多少个。 这一个就够我呛的。这个一个我都做不完。
Jane：这是几百件的？
苏：五百件的。
Jane：一个五百件的做不完，大概要几天？
苏：后天吧。
Jane：要两三天。
苏：也比较辛苦。
Jane：刚烧好的？
苏：烧出来就是这样的。

7.4.2.3.10 Interview 12: Fang Lili, Chinese Arts Ceramic Innovation Industry Summit Forum, 20081019

地点：景德镇紫晶宾馆 Jingdezhen Zijing Hotel (five star)
会议：中国艺术陶瓷创意产业高峰论坛（Chinese Arts Ceramic Innovative Industry Summit Forum）后
人物：方李莉

Jane：你对于景德镇的发展宏观的有什么看法？是往一个比较好的方向走，还是往一个比较不好的方向走？

方：我觉得是朝着一个比较好的方向走。因为我刚才讲了，民国初年的时候，景德镇是遭遇了彻底的打击，就是外来文化的冲击，使景德镇丧失了发展未来的信心。也不能说完全没有信心，这个信心是建立在什么基础上，就是把自己的传统全部丢掉，然后重新革命，一个全新世界的诞生才可能。所以那个时候的整个国家也好，整个的社会也好，都觉得景德镇落后了。太传统了，所以我们要把这个传统革掉。所以那个时候中国最常讲的就是打破一个旧世
界，建立一个新世界。当然不仅是景德镇，包括整个中国。所以中国在民国期间是经历了一个早期的现代化的改革。对中国来讲是一个很痛苦的一个阶段。在这个阶段你突然发现你的知识跟世界不能接轨，你的技术跟世界不能接轨，你的社会制度跟世界不能接轨。包括你的习俗都是被别人嗤笑的，落后的。所以这个对整个中国人来讲都是一个痛苦的记忆，对景德镇人同样是这样。那么四九年以后我们终于开始从手工走向工业化，因为在计划经济下，景德镇人真的是走出了手工，景德镇到处是烟囱林立，到处是机修隆隆响，这时候景德镇人丢弃了手工。但是到了现在九十年代以后，大家发现我们以前要唾弃的文化是一种珍贵的遗产，包括景德镇一些传统的制度，包括他们的习俗。他们来干什么，他们就是来记录这些东西来的，就来了解这些东西来了。以前我们认为很落后的手工，不能标准化的手工，现在突然发现它是一个很了不起的记忆。所以我们不但要去传承它，还要去保护它。所以有些手工艺非常精彩的人物我们要把他，在日本就叫做人间国宝。在中国就叫做传承人。所以突然一下子大家觉得这个东西很珍贵。那么景德镇一千多年历史以前都是包袱。他是束缚景德镇往前迈进的绳索。但是突然间大家发现不是，是我们可以开发的资源，是我们发展的基础。也许我们在做这个事情，坐在山上，坐在银山上，但是我们没去挖掘它。所以这个带来整个巨大的变化。景德镇开始打手工艺，不再打工业牌，打文化牌。你没发现吗？景德镇现在打的不是产业牌，打的是文化牌。那么这些大师要在这些文化背景下才能诞生，没有这样的文化背景就没有这些大师。也不可能有这些市场。所以的话呢，光有这些大师是不够的。在民国期间，景德镇也是用这样的方法来应对机械化生产。我们手工不抵机器，所以我们就要用来艺术，来抵机械产品，所以那时候景德镇开始发展陶瓷艺术。但是艺术毕竟是个人行为。它不是产业行为。所以尽管景德镇那时候的手工业非常发达。手工业达到世界的肯定，它参加了巴拿马金奖，那时候整个景德镇的手工也还是被重视。巴拿马金奖，那时候全世界工业产品评比当中中国得了一千多项奖。景德镇好像有三个艺人得了奖。但是尽管大家承认你的手工好，承认你的艺术，但是仍然不能拯救景德镇，因为他不能解决就业的问题，他不能解决批量产品的问题，不能解决经济的问题。所以的话，景德镇在民国期间是一片败落。那么到了解放以后，四九年以后，在共产党的领导下终于走出了这种东西。走出这种东西呢，市场没有把这种传统的记忆给丢掉，还有国外的需要，景德镇为了换取外汇所以景德镇仍然保留少量的手工艺，这个地方呢。那么做了瓷器的话，就拿到国外去卖。那么改革开放以后，景德镇开始发生巨大的变化。因为计划经济的时候没有关系。计划经济的时候景德镇的产品不愁没地方销。因为是国家计划的，你景德镇就生日报，其它地方就没有生产的，就是你老大。谁能跟景德镇竞争，没有人能跟景德镇竞争。所以那个时候景德镇的日用瓷很好的，十大瓷厂很兴旺。但是呢，九十年代开始了第二次现代化了，当然我们说计划经济现代化，社会主义现代化，那么资本主义现代化开始出现了，市场经济开始出现了，自由竞争开始出来了。在出现自由竞争的时候，景德镇的传统就成了包袱了，它总是怀念以前的东西，所以最后竞争不过潮州，竞争不过醴陵也竞争不过淄博，最后那些厂都垮掉了。那么景德镇的人垮掉没关系，作坊很容易。所以一点点小本钱，租一个农民的房子就可以开始做仿古瓷。我们就可以开始做艺术瓷。所以这样的话，景德镇又开始恢复了手工业作坊，又开始把日用的东西变成艺术的东西。但是又遇到了民国时期一样的困难。我们不能解决就业的问题，所以现在景德镇还是很困难，尽管我们在年年都在搞这个大赛，还是很困难。但是我认为这种困难是可以解决的，是可以走出去的。我就讲其实我们可以多元化的。我们仍然可以利用我们的产品把景德镇变成艺术旅游城市。你看现在不是很多的古建筑又恢复了。以前我们拆掉的古建筑又恢复了。很多的手工业作坊也越来越有特点。还有很多外国人来实践。所以我认为现在的景德镇可以走旅游的，当然一条路是不够的。这个名人的作品是一个方向。然后呢旅游业是一个方向，然后未来的话还是可以发展产业，发展设计业。也就是说为什么景德镇日用陶瓷厂我们没有设想，我们的设计落后，我们没有市场。但是我觉得景德镇日后再这一块还需要加强。要就新的设
计，但是这新的设计也很厉害啊。在景德镇新的设计里面，景德镇的传统又起作用了。我们怎么才能打起这个棋来呢，常常挖景德镇的传统，打景德镇品牌。我们可以设计一些更好的，质量更高的，但是不会生产那么快速的。我们这个社会已经不需要我们快速生产了，现在我们快速生产已经过分了，已经浪费资源了，变成垃圾了。我们可以做非常精美的日用瓷。是不是，像这样的设计是可以走向世界的。它是可以拯救景德镇的，它可以解决劳动力问题。

Jane：当别人讲到景德镇传统文化产业的时候，是指它陶瓷的一部分，还是指整个景德镇的陶瓷产业，就你看来是怎样的？

方：你要讲什么时候的传统产业。因为传统它有个时段。要是你现在问我，那肯定是指以前的，是指手工的时段。不是指这些现代的。你要指那个时间。当然现在也有传统的，现在的手工也算不算是传统那么你可以去理解。这就看你放什么背景。

Jane：因为我也是在界定的方面有一点模糊。

方：所谓是传统就是手工。但是现在这些传统也可以变成现代。所以我提出一个本土话，现代化的问题，你也可以把传统变成现代。所以未必手工的就是传统的。现在手工的也可以做出很现代的东西出来。但是一般来讲，传统的就是手工的。

Jane：因为我现在讨论传统文化产业，我现在的理解是可能是仿古，那可能是我会探索得比较多的东西。

方：那也可以。那仿古也可以啊，那也是手工的。那是在不光是手段上是传统的，产品上也是传统的。还有可能是生产方式可能是传统的，但产品可能是现代的。这样界定也行。

Jane：从你的角度来讲就是说，把景德镇的人分成几个群体，那景德镇的发展跟哪些群体的发展比较相关，比如说政府是一个群体，比方说手工业者是一个群体，你觉得说哪些群体的发展对它有至关重要的影响？

方：在中国政府肯定是至关重要的，政府他是一个起主导作用的，但是政府重要也不重要。所谓重要，它是制定政策者，都非常重要的。但是它如果不干涉就不重要的，如果它让它自己发展。其实最重要的是市场，市场有需求才有发展。政府主导有时候也没用。所以这个世界，在市场发展的是世界，主导者始终是市场。

Jane：还有在我了解实践的过程当中，您当初有写到血缘、地缘跟业缘的关系嘛。但在实践的过程当中的话，他们互相的影响力越来越降低。他们只是在个别作坊当中存在的这样子的意识。但像抚州人，他们之间比较是一种竞争的关系维系共同抵御外来，比方说鄱阳人也好，还是景德镇本地人也好。你觉得这样的现象对景德镇来说是一个好事，还是不好的？

方：中国这样的结构，这样的血缘、地缘业缘，尤其是血缘和地缘是乡土中国的结构模式。这种模式越根深蒂固，农业文明的模式就越浓厚。然后它的血缘，地缘越淡薄，它工业社会的模式就越浓厚。但是景德镇的现在呢，它还存在一部分，血缘和地缘的关系。比如说很多人都是投亲靠友来了。但是这种东西在现在自由竞争下，它会越来越淡化。那我想它肯定是由农业社会结构向工业社会结构一个必然现象。但从竞争来讲当然是任人唯贤比任人唯亲更好。

Jane：所以它是一个相对比较好的现象？
方：是吧，家族产业有很多的坏处。就是你不可能很客观。因为很多连带关系。从竞争的角度来讲，不是从其它角度来讲，它不是一个好的方式。但你不从竞争的角度来讲，从人的亲情来讲，也许是好的。这个东西没有好跟坏，就是你从哪个角度去讲。要是你要从竞争机制那这个肯定是不好，你要讲究人的情感，这个也许是好的。对嘛，亲情血浓于水。

Jane：这种亲情在小作坊当中还是非常明显的。

方：不单明显，而且非常重要。很多小作坊都是夫妻店。是吧，它夫妇之间互相依赖。丈夫可能来画，老婆来卖。还有呢就是家族店。儿子在外面推销。爸爸在家里做。妈妈也在帮忙。然后老婆也在帮忙。这样的现象在景德镇也有。但是这个系统一方面是好的。你说不好，其实也有好的可能性。因为按照后工业社会的理论，可能人又会重新走向家庭。这样可以使得夫妇的关系更紧密。所以为什么在工业社会离婚率会那么高，因为大家除了有性的关系，没有了更多的，所以除了爱情的关系之外就没有更多的事业上的纽带。所以一个家族一个事业为什么农业工业社会它的家庭非常紧密，因为我们依赖的东西很多。你看现在的家庭它可以不依赖你，各有各得工资，各有各得爱好，各有各得同事，那么我们同在一个屋檐下，那么爱情更难持续。但是他们分析在未来社会里面。夫妻合作是一件非常好的事情，是可能达到的事情。现在毕竟什么东西都小型化了，像艺术的生产都是小型化的产业，他不是大型的产业。你完全可以做得到。一个丈夫，他在景德镇画陶瓷，他老婆帮他填颜色。或者他做所有的老婆可以帮他推销。这完全是一种可能性。所以这是一种多元化的一种选择。现在越来越有这样的可能性。

7.4.2.3.11 Interview 13: Mrs Yu, Fanjiaping, 20081020

Interview Transcription 13 20081020

地点：樊家井
姓名：余女士

Jane：我想采访的是一下这十五年樊家井的发展和变化。余阿姨，你怎么看这十五年樊家井的，十五年前是怎么样的?

余：十五年前樊家井人比较稀朗，没有现在这么多。好少数的人到那里做，几乎一半是住房。一半自己住，一半租给人家开店。近五六年全部把住的房子改成店面。原来没有那么多店铺。原来几乎全是私房。都是郊区农民的私房。原来都是我们郊区菜农的房子。以后就慢慢形成一种自然规律。樊家井离火车站比较近。再来就是很多饭店，住在这里比较方便。全部打通租了店面，而且好多抚州的人过来开旅社。这几年就形成了私人的陶瓷市场，做仿古的几乎都在那里。

Jane：那十五年前的房租大概是一个什么样子的价位？

余：十五年前樊家井人比较稀朗，没有现在这么多。好少数的人到那里做，几乎一半是住房。一半自己住，一半租给人家开店。近五六年全部把住的房子改成店面。原来没有那么多店铺。原来几乎全是私房。都是郊区农民的私房。原来都是我们郊区菜农的房子。以后就慢慢形成一种自然规律。樊家井离火车站比较近。再来就是很多饭店，住在这里比较方便。全部打通租了店面，而且好多抚州的人过来开旅社。这几年就形成了私人的陶瓷市场，做仿古的几乎都在那里。

Jane：那十五年前的房租大概是一个什么样子的价位？

余：十五年前，像我那个店，就是几十块钱，最多一百块钱，现在涨到了一千多块钱。

Jane：大概多少平米的店？

余：二十平米。

Jane：现在快两千了。

余：一千三百块钱左右。还算便宜的。如果是上一条街已经过了两千。二十平方的店已经过了两千。我们以前的店面二十平方，就是八十块钱，一百，一百二。比那大一点的就是三十的，就是一百二。现在就涨得不得了，现在那个房租涨得太厉害了。东西做得好一点的我们就出来了。

Jane：也有一些人就不开店了是吧？

余：诶，有一些人就不开店了，在家做，或者到其它地方，到国贸楼上开店的也有。有的干
脆在自己家做。自己做自己卖。我以前的作坊店都在那里。整个一个店，还有好大的两个作坊。整个一起一百多个平方，一百五十来个平方将近在樊家井。那时候都只要四百块钱。后来就涨到五百。就是十五年前的时候。那时候房子刚刚做起来，就是那个价位。但是现在涨了多少。现在他已经把我以前那个地方改成店面了。他现在已经收到四千多块钱。现在呈十倍的涨。他们樊家井自己的私房他们涨多少自己商量，每个人涨多少租金。因为做生意的人都不会走，一个店四五家，六七家共同租一个店，那就负担轻一点。一个人一米货架，四百块钱这样的。

Jane: 客源来讲的话是比十五年前来得多还是少？
余: 客源还是现在多一点。十五年前做的时候，客源没有这么多。但是以前生意好做，客源少生意好做。现在客源多，生意也不好做。东西卖不起价。以前做得少，做得好的多，现在做得好的少，都是大陆货的东西比较多。因为好多都是外地人来做，景德镇的人做得好少。景德镇现在做得好一点的都是在自己家做。现在都是好多外地人，抚州的，都昌的，鄱阳的。抚州人多，现在就像一个小抚州街一样。

Jane: 他们说大概有百分之六十的是抚州人。
余: 超过了。大概有百分之七十五。

Jane: 他们说乐平的有几百人。
余: 乐平的还是少，但比都昌的要多一点。

Jane: 他是画花鸟的吗？
余: 他们画花鸟的多一点。

Jane: 他们画花鸟的多一点？
余: 他们画花鸟的，雕刻的都有，还有画花鸟。鄱阳的雕花，乐平的画花鸟的多。因为他们离景德镇好近。

Jane: 你去年搬出来的？
余: 我今年四月搬出来的。

Jane: 那时候的房价已经很高了？
余: 房价已经一千一了。我那个时候是最便宜的，一千一。他们说了一年马上都要涨。我是跟他交了一年半的房租。他也讲说到期就要涨。我就出来了。店面转给一个朋友给他租。现在好多都是租货架一个人几百块钱。如果是租一间店面盖房租都盖不了。有的做得还可以，有的就倒掉，他们利润薄，有的就在景德镇瞎种田，晒太阳。反正就是挣自己的口粮。

Jane: 像他们好几个人租一个店，他们会不会客源比较分散？
余: 那也不会。没有影响，客户到了那里，他需要买什么就买什么。一般买这个都是老客户多。

Jane: 像你们都是做老客户做得多？
余: 都是做老客户。

Jane: 所以樊家井这十五年，房价大概涨了十倍。但是它的客源也是相对比较多。比较形成那个市场，对不对？
余: 市场是自然形成的，但是瓷器价钱已经卖得好像了。像我们高仿的在那里，他们出的价，我成本都不够。没办法做，在那里。

Jane: 那怎么没有考虑过筲箕坞？
余: 政府不让筲箕坞那边做，不能做窑。本来景德镇好多地方都可以开店，像陶瓷城咯，昌南咯，国贸咯，都可以开陶瓷店。就像锦绣昌南，陶瓷城都可以开店，但是大家都往这边挤，就好像一个西瓜那样的。
姓名：曹阿姨

年龄：四十岁左右

Jane：现在就是价格，十年前比较好，现在比较不好，对不对？那有差到多少？
曹：我的差到一两百，其他人的就不知道了。

Jane：所以一件瓷器就差一两百块。那那时候做的人多吗？
曹：做的人少。

Jane：那时候樊家井有多少家商家？
曹：十年前啊，就是现在的三分之一。

Jane：就是现在多了三分之一。难怪市场比较难做，因为做得人多了。那你知道像他们这种挑坯的，挑一趟多少钱？
曹：他们是包月的。他们是窑老板包月。然后就是额外的时候，像我们产品多的时候再额外付一点小费。

Jane：那像那种挑工一个月多少钱？
曹：两千来块钱。还一天做到晚。

Jane：我以为挺便宜的，一趟大概十来块钱。
曹：一天不只三十趟啊。

Jane：所以就是别人要搭烧的东西都让他们挑就对了？
曹：对。

Jane：那现在窑多吗？（指樊家井）
曹：现在就有十来座窑。

Jane：搬出去的不算太多？
曹：像樊家井容许建窑。别的地方已经搬到别的地方去了，那个搬迁很大。搬离了生活区。这个地方容许建窑，基本上没有搬。别的地方都搬了。

Jane：那十年前租金有什么样的变化吗？
曹：租金大概翻了三番。以前一个货架两百块钱，现在六百多块钱。

Jane：客源的话是现在多还是以前多？
曹：客源的话还是现在多了一点。开店的多，客源也多一点。

Jane：你们生意比较不好做，是不是因为店多了很多？
曹：现在市场也滑落了一下。经济也滑落了一下。

Jane：以前打牌的人多吗？

曹：（摇头）。

Jane：以前打牌的人不多。现在比较多？是不是因为市场滑落？

曹：打牌。原来就风气不好。

Jane：是因为风气的关系。跟生意有没有得做没有关系？

曹：这个没有关系。

Jane：如果说他们生意都很好的话呢？

曹：一样打。坐店的看店又没什么事。

Jane：打牌的外地人比较多还是本地人比较多？

曹：就是这条街上，别的地方都没人。都是打小牌。

Jane：休闲的那种？

曹：对。

Jane：那打牌会影响生意吗？

曹：那不会。

Jane：等于是樊家井的风气。那你一来就是画瓷器？你上次有跟我讲说你家里人只有你在画瓷器。

曹：我家里是一个人，还有亲戚朋友都一起做。只是我丈夫没做这个。

Jane：你今天不用画？

曹：我刚刚从外面回来好累。

Jane：那你一天可以画多少瓷器？

曹：画不多，画大概五十块钱的瓷器。

Jane：他们订的多，还是直接买的多？

曹：像我品种不都放在这里，都是订得多。有些店是买的多。

Jane：所以你是订的多。像他们看中了那个瓶子就说要多少个？

曹：对对。

Jane：像你们搭窑去烧的话，一次要多少钱？

曹：是按公分计算的。

Jane：就是按多少立方。

曹：那个我就不懂。我们自家有炉的。我不用搭烧别人的。我们是釉上的，釉下的一定要
搭烧了。那么大一个窑，不可能自己做。我们这个粉彩就是烧一个瓷器。

Jane：就是窑比较小，对不对？

曹：那个叫炉，温度就七百来度。他们差不多要一千多度。釉下从泥巴烧制，像我们这个是釉上加工的。不要那么高的温度。

Jane：青花的话一般是从泥开始做的是不是？

曹：对对对。

Jane：那你就是给别人买白胎来做？

曹：对对。

Jane：那白胎在樊家井卖吗？还是在别的地方买？

曹：在别的地方买。在专门卖白胎的地方买。

Jane：一般在哪些地方可以买到？

曹：艺术瓷厂啦，万能达，专做白胎的。艺术瓷厂里也是有窑的。

Jane：在莲社北路吗？

曹：在珠山东二路。

Jane：在那边是卖白胎的地方？

曹：对对。他们生产厂在东二路，办公在莲社。

Jane：现在有很多红店在莲社北路那边。

曹：对对对，很多名人名作。那边很多名人名作。像国贸就是很多现代装饰瓷。

Jane：我今天有去新都民营陶瓷城。

曹：那边还没有成市吧？

Jane：没有。离市区比较远。但是新都那边很多店都开在国贸。

曹：对对对。他们一般装饰瓷的，对对对。

Jane：新都那边做装饰瓷的特别多。

曹：也有做仿古的放在这里卖。

Jane：对对对，大概一两家我采访的。

曹：像上面那一家就搬到新都，他们自己买了房子，这里就不用付房租了，就到那里去。

Jane：那边房子也比较便宜。

曹：对。那陶瓷城那边去了没有？

Jane：去了。

曹：那边是卖旅游瓷的。
Jane: 它那边日用瓷卖得比较多。
曹: 旅游的。那边各种各样的瓷器都有。仿古也放在那里卖，一般装饰瓷也有，名人名作那里也有。还是外地人买得多。还有金昌利。
Jane: 金昌利去看了一下。有日用瓷，名人名作也有。
曹: 就是外地人来参观旅游的地方。国贸也有。
Jane: 这边就是比较精专的市场，卖仿古。其他地方还是比较散一点?
曹: 对。
Jane: 那你一开始做，这里就是卖仿古吗？一开始就定位得很清楚?
曹: 对。
Jane: 那时候别的地方有卖日用瓷吗?
曹: 开始广场那边摆地摊的，开店的都有。
Jane: 但是没有人跑来这里?
曹: 这里没有。日用瓷批发都是在许光路那边的。
Jane: （打牌）真的没有影响?
曹: 没有影响。
Jane: 他们如果想要的话都会叫?
曹: 你看，每一个柜台都是不一样的货，所以我不担心他不到这里买到那里买。我这个品种，仿这个年代的，这个时期的就我家做。你如果在外面卖这个时期的，只能到我这里买。所以我不担心他不到我这里买。我仿这个年代的，或者仿这个时期的，就我家做。所以你如果在外面卖这个时期的，就得到我这里买，只有价格不一样。
Jane: 那有竞争吗?
曹: 有是有，但不多。也有。
Jane: 仿一个年代的一般只有一家，仿某一个图案的?
曹: 是。
Jane: 所以他就是做得比较精专，所以就比较没有竞争。所以他们做生意都不怕别人抢。
曹: 对对（笑）不像商店里的，他不在我家他可以到别家买，所以来了顾客一定要彬彬有礼，不像商店里的要礼貌待人。
Jane: 所以你这个图案的话，这条街只有你有?
曹: 也不是，也有别的地方有。但是不是那么相同。
Jane: 不是一模一样的。
曹：不可能一模一样。有相似的。

Jane：所以他们要哪一个图案的话，一般要来这里吗？

曹：嗯，他看中哪个就来这里买，或者就没看中。17’22

对象2：刘女士

年纪：约四十岁。

Jane：你在樊家井待了多久？

刘：十六七年了。

Jane：那时候樊家井商家多吗？

刘：那时候没这么多，房子都没建，这个房子都没建。

Jane：那时候的商家大概有多少？

刘：三分之一的样子。

Jane：那时候的房租是怎样的？

刘：房租便宜，两百来块钱。一个货架两百来块钱，现在六百。涨很多啦，成本也涨，什么都涨，瓷器的话没有涨反而跌。现在就是搞点吃饭的钱。现在没钱挣。

Jane：那时候比较好挣。

刘：那时候价格高，至少是对半（的利润），现在的话赚十来块钱。坏了还没有赚。坏了那几个东西都没有赚。

Jane：所以说那时候如果卖三百，成本就是一百五十，对半，是不是？

刘：嗯，对对。好比就是五十块钱本钱，卖一百啦。

Jane：你们是个体经营的吗？

刘：都是私人的。都是自己的。哪有公家的。十大瓷厂都倒闭了，哪有公家的。那个舒小琴给搞的，那个舒小琴不知道怎么爬到中央去的。都是她搞垮的，我们都嫌死她了。那时候瓷厂都蛮好的。

Jane：你原来是瓷厂下来的吗？

刘：我原来是陶院的大集体。

Jane：也有受她的影响吗？

刘：那当然的啦。肯定的啦。那十大瓷厂那么多人出来，都要做。还有外地人都要做。那个
竞争就厉害了。那肯定是的。如果瓷厂不倒闭，那到这里来，这里就比较封闭式的，外地的到我们这里来，也不会踩成这个样子了。比如说我做这个东西，别人看着有钱挣就仿。你仿了，就互相踩价了。互相价钱跌一半，都是互相竞争，踩价。他做的东西没你好，就比你便宜。你就卖不动，你也要降。降了，他又再降。

Jane：就恶性循环。

刘：对，就恶性循环。难做，现在的生意。

Jane：他们说今年生意会特别不好。

刘：是的。一年不如一年。今年是最难做的，那么明年可能还更难做。好多都倒闭了。好多坚持不下去的人都倒闭了。

Jane：那你家里只有你一个人做吗？还是有其他亲戚朋友一起做？

刘：原来带了徒弟。好多都不做了。

Jane：因为不好做？

刘：还有根据个人的情况。有的走了，再加上生意不好做，人家都寻别的路去了。

Jane：那你家里面有人一起做吗？

刘：做。我一家人都在做，三个，老公，儿子咯。那就是自己赚了个手工钱。赚手工钱就多赚一点。如果请别人，工资都盖掉，就没钱赚了。

Jane：那你们是怎么分工的？

刘：分工就计件。做一个多少钱。都是计件的。

Jane：那你们三个人之间有没有怎么样的分工？

刘：像我老公就打杂，写底款，还有做坯咯。还有端坯，晒坯。

Jane：所以你们连坯都自己做。

刘：也请人啊。请人来拉泥巴，还有请人来做成型。还有盖线啊，打杂。儿子呢，也兑兑线条，还有上釉。

Jane：那你们做的这个算是那个年代的？

刘：像我们自己做，要画要填。

Jane：所以是一年不如一年，现在顾客也比较挑了？

刘：嗯！挑，有一点毛病就压。压得我们都没有办法卖了。不卖生意就难做了。他们拿出去也难卖。也卖不到钱。

Jane：东西多了嘛？

刘：东西多了，这个也很复杂。不光是东西多。
Jane: 他们会挑画面？
刘: 就要看他们具体喜欢不喜欢。他们拿出去展销各种各样的很多。

Jane: 那跑展销的来这里拿得多吗？
刘: 我的东西吗？现在不多，以前多。以前做不完，现在难做了。

Jane: 现在跑展销的好像都去国贸拿货。
刘: 我们这里也有。国贸的东西相对是要便宜一些，便宜他们的东西也差了。他们都是贴花的啦。青花很多都是贴花的啦。很多写意的，刮刮刮，刮两下就出来了。贴花的都是大批量生产的。

Jane: 所以它不是手工的，但樊家井这边基本上都是手工的。它也不是绝对没有，它也有手工的。
刘: 日用瓷还是比较好的。像我们这种仿古瓷，也有别人做好的。像我们这个瓷器，说不清楚。反正现在总的来说是越来越难做。一年不如一年。

Jane: 那十五年前整个瓷器的市场是个怎么样的市场？
刘: 那个时候的瓷器做出来就有人要。只要是做得出来，什么样的瓷器都有人要。

Jane: 现在是进入市场经济的一个状态。
刘: 现在说多也是比较多。怎么会这样我也搞不清楚。现在金融危机咯，也难做。

Jane: 对这种装饰品的东西也比较有影响。
刘: 嗯。这个东西是可要可不要的。条件好的可以要，条件不好的谁要这个东西。

Jane: 这个是属于精神的消费品。
刘: 嗯。

Jane: 你一天能生产多少个瓶子？
刘: 生产不了多少。做的话还可以做不少，大概十来个。还要上釉啊。没人做的话一下子也做不出来。

Jane: 你的速度也比较快。
刘: 做熟练了。

Jane: 图案都是自己构图的？
刘: 嗯。

Jane: 一天这个可以做十几个？
刘: 做不到。做五六个。还要上釉，没有上釉可能可以做多一点。

Jane: 还有上釉和填颜色，这些都是你自己做吗？
刘：我当然可以做，但全部我做就更做不出来了。如果全部上手的话，这个可以做三个四个。三四个也已经累死人了。

Jane：所以你都会有些部分请人做吗？

刘：嗯。有些部分请人填釉。这种填釉的人都是我自己带出来的学徒。

Jane：你是哪里人？

刘：我人是南昌人。

Jane：那你学徒都是南昌人吗？

刘：我没有学徒，都是我自己摸索出来的。我来的时候瓷器是做过，但不是这种瓷器。原来做过是上线条，刷色胎。都是低温釉，低温釉含铅很多。填那个釉都从毛孔钻到手里面。久了以后就铅中毒。后来没做了，就搞高温，像这种都是高温。高温的釉基本上都是用机子吹上去的。那我们就用手工填，那叫摸轴（音译）。开始做之后，有三四年都没有赚钱。都做得不好的东西。做得很多釉跟坯都不合。釉填的技术没有过关。不知道怎样填。

Jane：那么就慢慢自己摸索出来。

刘：嗯。

Jane：那你带徒弟都是亲戚朋友介绍的，还是自己找上来的？

刘：开始一个是找上来的，还有就是邻居。现在做的基本上都是邻居，旁边的人。他们没做事了，问他们要不要来做。

Jane：新西兰，他们也有运过瓷器到那边卖，价格很高。

刘：新西兰，他们也有运过瓷器到那边卖，价格很高。

Jane：展销是不是？

刘：那时候刚好有法轮功跑到新西兰宣传。搞得跟展销联系一起了。把他们全部遣送回来。不能卖了。就是法轮功看到展销，就跑去跟他们宣传。就是因为这个事，中央的人就讲要他们回来，就全部抓回来。

Jane：但不是跑展销的人的问题，是不是？

刘：不是他们的问题。就是借机生事。他们外国人也有很多同情中国人，觉得他们好穷。也有人觉得他们很丢脸。

Jane：所以跑展销的人就比较少了？

刘：很多人的护照都被收上去。

Jane：是因为法轮功这件事情？

刘：好像是因为这件事情。具体的我也不太清楚，他们好多人也没讲。有的不准他们乱讲。我们这里开店的，有一起去新西兰的。就讲了一点点这个事。
Jane：在那之前应该跑展销比较容易，现在比较不容易了。护照比较难拿了。
刘：有的人路子比较广一点的，还是一样跑。有的人专门在外面开了店。他们就送货过去。

Jane：跑展销以仿古为主吗？
刘：跑展销啊，什么瓷器迁出去。他们认为比较好看的咯。比较有特色的咯。他们会先了解哪个地区，喜欢什么瓷器，喜欢什么样的。他们也会去了解一下。有的地方不喜欢有眼的，不喜欢有鸟的，有人的，各个地方的风俗不一样。他们就会先去了解一下。

Jane：那你们自己有窑吗？
刘：窑，我们是买了一个窑在新都那边。那时候政府不是说要搬要搬。把窑全部集中，说是唯一的梭子窑生产基地。搞得我们都买了那边的房子，本来是要买在国贸的。结果国贸没买，买到新都去了。那边太远了，就空在那边。有的人是租出去。搞得我们房子都白买。现在窑又不撤了，又撤不动。撤不动我买的窑就空在那边。这边就搭别人的窑烧。

Jane：所以你就买了那边的房子。
刘：很多人买了。

Jane：有出租出去吗？
刘：有的人有出租有的人没有。租也租不到多少钱，划不来。他们市政府说话不算数。

Jane：他们没搞起来。
刘：他们没搞起来也不管了。骗的。给他们骗的。那时候到处贴撤撤撤，都要撤。梭式窑都要往那边去。

Jane：那原来你在樊家井有窑吗？
刘：我原来也没有。也是搭别人的。反正做窑的人是专门烧窑的。他们也不做瓷器。那我们做瓷器，搞一个窑就顾不来。

Jane：他们就会请那种挑坯的人。
刘：嗯。

Jane：那挑坯的人一个月多少钱？
刘：有的是按挑坯，挑一个窑是五十（块），具体看窑的大小，也有八十的。有的是两个人一起挑，窑大的两个人。

Jane：他每天都烧窑吗？
刘：现在生意淡了，以前生意好的时候就天天有窑烧。现在生意不好，没那么多坯。

Jane：那现在樊家井还有多少窑？
刘：我不太清楚，大概还有二三十座吧。
Jane: 那搬到新都的多吗？
刘: 开始都搬过去了，很多人都搬过去了，结果不行了，又都搬回来。因为那边都没有人去买货。没人买货，又都不方便。
Jane: 樊家井在那里做，在这里卖的还是有的。
刘: 也有。国贸很多人在那里做。他们做完以后再拿到国贸去卖。像我们房子买在那边，人又住在新厂这边。到那么远去，我还要招呼他们做事，自己还要做，那就搞不成了。我在这里，作坊就在后面，就在旁边。就方便了。还要运瓷器过来，一大家的人手。我们没人手，搞不过来。
刘: 你有到(新都)那边采访？
Jane: 有。很多都是店在国贸，原来都是老厂搬过去的。
刘: 对对。那时候拆梭式窑啦，还有樊家井咯，陶瓷城咯。
Jane: 还有筲箕坞。
刘: 现在都不管了。政府说话真的是不算数。
Jane: 那老厂现在有窑吗？
刘: 老厂现在有窑，怎么没窑。现在又建起来了。肯定的啦，现在有生意。
Jane: 他们说现在老厂比新都的人还要多。
刘: 有也有蛮多的。如果市政府全部统一的话，按他们的话说市场全部集中，窑什么的都集中，那搞起来是蛮好的。他们又不搞，搞又搞不起来。他像这里的人，这里的房东他们就不愿了。窑都拆走人，人都走了，那他这边怎么办？他为他自己的利益他就不肯。他们还跟市政府打官司。大家都走，他们肯定收不到房租了。损害他们的利益。
Jane: 那大概是两三三年的事，还是四五年前的事？
刘: 大概就两三三年的事。
Jane: 你们买房子也大概那个时候？
刘: 买房子都五六六年了那个时候。反正都好多年了。房子空在那边都划不来。
Jane: 那你们买房子的时候，政府有说要搬迁的问题吗？
刘: 讲了。我们都说买那里划不来，开发商说买那里划得来。全部的窑都搬过来，你们说是划得来还是划不来？搬过来，肯定是那里划得来。是吧？全部到那里集中，当然是那里划得来。那现在是政府说话不算数，他没这个能力。就是搬不了。就是樊家井走不了，樊家井可以撤，全部都可以撤。他就是搬不动樊家井。
Jane: 就是跟这边的房东关系大一点。
刘：就是跟这边的村民啊。像他们的土地都没有了。我们就是靠这个房租。你把这里撤走了，
我们怎么活命？他们就这样讲。

Jane：可是他们现在也赚太多了吧。
刘：他们现在都发财了，各个都发大财。他们多的房租一个月都四五万。你看他们多少钱。
我们都是跟他们打工的。都是跟房东打工的。像现在瓷器生意不好，他们房租还要涨。

Jane：今年他们还要涨吗？
刘：又涨了。涨了有三个月。

Jane：上个月还涨？
刘：嗯。

Jane：不是有金融风暴吗？他们还涨？
刘：他们不管。

Jane：照样涨？
刘：嗯。他们是发财想涨就涨。

Jane：这样就非常影响你们的生存了。
刘：嗯。他不管你的，你生存不了，就走。

Jane：所以很重要的一点是政府的政策下达得不清不楚的。
刘：他也不是不清不楚，他刚开始的时候到处贴说撤，电视里面也讲了，有几个部门（一起）。

Jane：但是他的政策没有贯彻下来。
刘：到了樊家井就没有办法了。

Jane：但是大家的心情都是比较希望撤的？
刘：做瓷器的就希望撤。房东啊，跟自己有利的就不愿撤。好比他房子在这里，他就不愿撤。
撤走了他这边就没有了。都是跟自己的厉害关系来守恒。

Jane：但是他们现在随便乱涨的话，对市场是一个很大的危害啊。
刘：他不管你，你做不了就不要做。所以很多都是卖玉器的，很多卖家具的，卖那个雕刻的。
他们从外地买来的货，还有什么掐丝珐琅啊。他们是从外面拿过来，所以他们的利润很高。
他们就包店，租不到店就包店。他说我要这个店，我加几百块钱给你。他说多加几百块钱你要不要，他们肯定租给他。

Jane：所以如果你要租的话也要加价。
刘：那你承受不起了，你只有走人。所以他们这些人就包越包越贵。

Jane：所以是这些人的关系？
刘：嗯。他包了，他可以出。

Jane：那政府对于房租这方面呢？

刘：他不管。

Jane：没有宏观的市场调控？

刘：没有。什么东西都不管，像恶性竞争啦，仿人家的瓷器都不管的。

Jane：然道政府就没有下达一些文件保护这边的仿古市场吗？

刘：没有，什么都没有。像几年前有讲像恶性竞争。但是有什么用？

Jane：他们没有政策下来。

刘：像我这个瓷器，别人都没有。我这个是自创出来的，别人也仿。我到那边去申请专利。他说只是一个器型申请一个，别的器型不包括。那有什么用。我说我申请的是我这种做法，这种工艺，这种颜色。不行，这个搞不成。所以别人就仿，仿你也没办法。还有我的徒弟出去做，价格都踩烂了。踩烂了，现在也没用了，他也不做了。我们还有一些老客户。我们做东西跟他们不一样的，他们是乱做的。

Jane：算是自创的器型。

刘：不是器型，是这种工艺做法。

Jane：所以也算是仿古的一种？

刘：现在说仿古也是乱仿。真正的仿古都是低温釉。现在都是乱仿，像我这个就是打大清的款。

Jane：一般都是仿当时时候的图案。

刘：嗯，都是仿当时的图案。

Jane：但是还是有创新。

刘：创新就是我这种工艺啊。

Jane：你这种工艺就是你自己创出来的。

刘：这种是高温颜色釉。

Jane：那你这边订货的人多吗？

刘：也就是一家订货的。有时候订一点，订得不多。都是零卖。有一家订，上个月订了两件，这个月没订。他也要把它销了以后再订。

刘：很烂的，政府什么也不管你。我们买了房子空在那里，没用。租也租不到多少钱。

Jane：听说一平方租五块钱。

刘：哪租得到？
Jane: 物业管理的说是。
刘：物业管理的是租这个钱。
Jane: 他们说租了一百多户出去。一百多户是卖出去的。你们是买的第一期工程吗？
刘：我们是买第一期工程。
Jane: 那时候第一期有多少个店面？
刘：也是就是四百来家吧。不知道，是两百来家还是四百来家。
Jane: 第一期应该是两百来家。
刘：是应该是两百来家。
Jane: 他们说租出去三百多。
刘：那第一期应该是四百来家。
Jane: 那第二期呢？
刘：不知道。他们有没有说是政策不好，本来说是梭子窑要搬过来。
Jane: 他们没有说这些。
刘：跟他们无关他们就不说。本来应该是说的。他的一期都租得差不多，所以他也不会说什么。
Jane: 他们说要建第三期。
刘：哪里建得起来。建了谁过去啊？第一期都这个样子了，还要建第三期。反正我们是吃了亏就是了。
Jane: 这里还是蛮多人去买了店面？
刘：是蛮多人的。搞得我们还在这边做生意。如果窑都过去了，那边就可以搞起来。我们买了房子的人就划得来。
Jane: 以后还是有可能有机会的。
刘：以后啊，不知道了。也有可能以后永远搞不起来。原来电视还演点，现在电视也不说也不提了。
Jane: 听说他们当时用一些老人家。
刘：对对对，让老人家去吵，他们摔一跤或是怎样的。
Jane: 那时两三三年前的事情了。
刘：对对。就是吵，让他摔跤。让他们推他，弄他，打他，正好闹了。这个就是他们的利益了。他们就让村里面一户户出钱，一户出多少钱，五十块钱拿到那边去。他们就拿给他（指老人家）。他们市政府的打了老人还得。他们就叫了老人去吵了。年轻的吵不成的。
Jane：所以他们这些房东还是很有办法。
刘：有。你上有政策他下有对策。
Jane：所以也不能全怪政府。
刘：那你政府没有这个力度，你就要把市场解决好。
Jane：所以唯一拦阻没有到新都的只是这里的房东？
刘：嗯，就是这边的人吵这边的人闹。拆不动的。
Jane：筲箕坞基本上拆了。
刘：筲箕坞都拆了好多。就是到了樊家井这里拆不动。
Jane：那填颜色的人要很了解你。
刘：他们拿起来就会填了。做多了就记得。
Jane：那你小孩多少岁了？
刘：十四岁了。
男：请别人画赚不到什么钱。也要看是什么瓷器。

Jane：那你从事这个行业，还是只有你一个人？

男：全家都是。基本上全家都在这里做。

Jane：所以就是有人做其它部分，你来画。

男：现在基本上都是自产自销。什么都要做。下手也要做。

Jane：那你有多少家人在这里做？

男：一般都是一家人，有多有少。

Jane：那你们房租有什么变化吗？

男：去年到今年没有什么变化。前年大前年变化好大。涨价好厉害。一涨就是一千，一涨就是一千。

Jane：就是 2005 年，2006 年的时候涨得比较厉害？那一年涨几次？

男：一年涨一次到两次。涨得少的就涨两次，涨得多就涨一次。

Jane：听说有时一年涨四次。

男：那很少。幅度都涨得很小。现在什么东西都难做。

Jane：你们这一间店有多少人做？

男：有十来家。

Jane：看不出来有十来家。

男：有的架子有两个人。有两家。

Jane：那你们这样一间店的房租有多少？

男：估计有三千多吧。

Jane：那你们这样分摊下来一个人有多少？

男：有四五百。

Jane：那你们有抚州的，有福建的。

男：那不一定。

Jane：你们租房子的时候都不认识。

男：对。

Jane：那你这样画瓶子一天可以画多少个？

男：那不一定。如果生意好的话可以画快一点。生意淡的话就画少一点。这个没有一定。

Jane：如果画得快的话一天可以画多少个？

男：一天画十来个也有。画四五个也有。
Jane：就是看订单的量。
男：对，就是看销量。销量大就画快一点。
Jane：那你们是自己从做白胎开始做吗？
男：对都是自己。从头到尾都是自己做的。
Jane：那你们有自己的窑可以烧？
男：窑是搭别人的。
Jane：是搭樊家井这边的窑吗？
男：对有人专门烧窑。
Jane：那你知道樊家井烧窑的有多少户？
男：那我也搞不清。
Jane：那你在这里有十三年，那这十三年中客户群体有怎样的变化？
男：有新的有老的客户。这一行变化也好大的，不是说你做这一行就一直做这一行。不景气的时候就变通。
Jane：那你曾经改行过吗？
男：改了几次。
Jane：有些时候陶瓷不好卖的时候就改行。
男：对对。就改其它的。
Jane：那时候他们搞新都的时候你在吗？
男：在。那又没几年。
Jane：那时候你是希望过去吗？
男：希望……都是跟着潮流走，人家走，你也要走。那不是自己说了算。那都是由不得自己的。哪里有市场就搞哪里，这很正常。
Jane：新都那边比较便宜，地方又比较大。
男：那是因为没有过去便宜。全部过去肯定都是一样的。都会贵起来的。
Jane：所以一般都是看市场在哪里。
男：都是市场说了算。

对象 4：挑坯工
Jane：师傅我想问一下你们样子挑一趟坯多少钱？

男：我们是计件的。

对象：男

Jane：师傅，我想请问一下樊家井这十几年的变化。

男：这个市场大概有十五年。在那之前都是作坊，没有店。店是慢慢形成的，店没有多长时间。店面最旺的时间就是四年。

Jane：就是最近这四年？

男：对以前都是很冷清的。以前这个市场在里村西路。以前都没有几家。都是搞作坊的。

Jane：都是窑在这里。

男：嗯，都是起了这个火车站，这个路起来以后就慢慢形成这个市场。原来里村的市场就跑到我们这里来。以前这里没有市场，这里好脏。非常冷清的地方，没人来的地方。原来这里都是田，阴沟啊这里，没有什么东西，后来才慢慢形成的市场。

Jane：那十五年前，七八年前瓷器好卖吗？

男：以前这里没有市场，都是在西路。西路好卖。是火车站这里慢慢打通之后，慢慢交通就方便了。旅馆啊，这里就慢慢形成了。

Jane：那刚刚形成的时候瓷器的价格跟现在有什么样的变化？

男：要贵一点。现在的价格要便宜一点。

Jane：那租金呢？

男：像这样的房子，以前的租金就三百块钱。现在是两千块钱。这个店以前就是我租的，以前就是三百块。现在就是两千块。

Jane：那你们现在有多少人在搭货架？

男：有三家。

Jane：这个就是仿宋青花的。

男：那个是仿元的粉彩的。

Jane：他们都是哪里人？

男：有市里的有抚州的，也有这个都昌的。

Jane：你自己是哪里人？

男：我是抚州的。
Jane：所以你店里面粉彩的是都昌人？
男：嗯。
Jane：做青花的是景德镇人。
男：景德镇人。
Jane：都是你租给他们的？
男：对。就是转手。因为我们一个人付不起吗，就搭架子。
Jane：就你看来，现在樊家井有多少商家呢？
男：店面可能有四百多家。
Jane：那一家里面平均可能有四到五家。
男：平均可能有四家。有的有一家的，有的有两家的，有五六家的，平均起来有四户。
Jane：所以算起来大概有2000个作坊主。
男：两千是有的。大部分是搞作坊的。小作坊的。现在瓷器也不景气。估计以后很难卖。现在好像还可以。以后可能就不行了。
Jane：前几年不是有讲要搬到新都吗？
男：有讲啊，但是没人去。是讲要搞到那边去。但是那边交通不方便。你想想我们做瓷器的要调到那里去，卖的人还要调到这里来。真的很不方便。就是你市场搞得再好，但是你不方便也不行。这个地方就是方便，它根本不像市场。但是这是它的优点，它方便。再说它作坊也在这个地方。从很多地方来讲都有很多优点。最不好的一点就是利润差一点。人用挤一点。哪里有市场条件又好，交通又方便，这里肯定就不行了。政府想要把人从这里赶到那里去是没有办法也不现实。因为你的作坊这边。那边路程太远。开店的一般都是作坊，是边生产边在这里卖。他们在这里生产在这里卖节省好多时间。再加上现在瓷器不好卖，倒来倒去的路费（很贵），像我们都希望有很好的店更好。没办法呀。新都要到西客站那边去了，还要把瓷器拖到那里去，很方便的。板车不能走，你自行车能带多少，一次也带不了。那么大一个东西怎么带。市场这种东西，它不适应啊。那边的市场不适应开作坊的人在那边搞。生产的地方离市场的距离太长了。
Jane：但是新都有窑啊。
男：但是新都有窑啊。造价什么的可能比这边还高。现在瓷器不景气，没有办法搞了。从新都跑到这边来。亏本的事肯定不会干的，最起码你肯定要生存下去。租金一高了，肯定不行，现在的瓷器太便宜了，没有办法。大体上就这个样子，细节上就很多了，讲不清楚。时间太长了，形成这个市场也是不容易的。这个前前后后总共有十五年。
Jane：房东还涨租吗？
男：他才不管你了，你说现在生意不好他还是要涨啊。挤不下去不是？
Jane：就是店铺有四百多家，但是做的人很多。所以他就不停的涨房租？
男：是的。
Jane：但是他不管金融风暴的事。
男：他不管。他没有组织性的，他就是私人的房子。他想怎么租就怎么租。他不管什么世界金融危机，经济不景气。他就是今年我租给你，明年人家要租二千二，他就给人家，他没有什么固定性的。
Jane：所以你做的是后面哪里的？
男：仿元的。
Jane：仿元的青花。
男：仿元的青花。
Jane：那你是全家人都在做这个？
男：是。
Jane：所以你没有请其它人？
男：基本上生产者都是自己一家人。
Jane：那你你自己烧窑吗？
男：搭窑。这里的窑很多的，就是按人家的窑。自己有窑的人还是少。有是有，是部分人。很少一部分的人。大部分都是搭窑。
Jane：做青花的要求地方比较大是不是？
男：要求的地方比较大，就是做坯啊要的地方比较大。
Jane：所以你们做坯也是自己做。
男：对啊，就是赚一点手工钱。不像以前。

7.4.2.3.13 Interview 17: Mix, Fanjiajing, 20081023

Interview Transcription 17 20081023

对象：徐良好
祖籍：景德镇本地人

Jane：这几年房租怎么样？
徐：房租上涨了，还有工人的工资也上涨了。
Jane：所以你们都是请别人画的？
徐：都是请别人画，有时候自己有时间也会画两笔。
Jane：那你们家庭作坊有多少人啊？
徐：二十多个。
Jane：都是亲戚朋友吗？还是都是招聘的？
徐：有带来的徒弟啦，有招工招聘的。
Jane：有没有老家带来的徒弟？你是哪里人？
徐：我是本地人。
Jane：那你带徒弟都是哪里人？
徐：都是附近农村的。比如像浮梁的，都昌的，乐平的那附近的。
Jane：所以都是带他们画青花，影青，梅瓶？
徐：都是画青花。
Jane：所以你们从做坯都是自己做的？
徐：我拿一张名片给你。
Jane：所以你们在新都也有。
徐：是的。
Jane：那你们有窑吗？
徐：有。什么都有。
Jane：你们是一条龙的？
徐：是，我们是一条龙的。我们都是自己做自己画，利润太薄了没办法。
Jane：所以在樊家井这里在新都有厂房的人多吗？
徐：不多。新都有厂房的一般在国贸。
Jane：国贸新厂的？
徐：嗯，国贸新厂的。
Jane：不是很多樊家井搬过去。
徐：原先很多樊家井搬过去。
Jane：就是在政府鼓动的时候搬过去的。
徐：就是在几年前搬过去的。06年搬过去的。
Jane：那你觉得这样子方便吗？
徐：我觉得那边还行。
Jane：你觉得这样搬来搬过去还好。
徐：那边规模还好。这边做事不好。
Jane：你们订单比较多，还是？
徐：我们有订单，有国外的。国外的，国内的都有。订单都有但是不大。我们都是仿古工艺品，没有那么大的订单。
Jane：那这几年客户有怎么样子的变化呢？
徐：客户是越来越多了，不过是利润越来越薄了。
Jane：那为什么会出现这样的现象呢？
徐：那肯定了。我们景德镇的产品变化少。一般像我们做的都是仿古工艺品，就是要跟着书上差不多做。书上就那么多东西。又要好看又要实惠别人买去，你不能卖贵了。

对象2：男
祖籍：丰城
男：樊家井真正开发就十年，十多年。原来这后面是山。九二年开始是作坊。我们九二年，原本在瓷厂，市里面给我们买断了，开了一条街就在国贸那里。我们下岗了，没事做了，就给我们弄了个待业一条街。就给我们下岗的人搞店面。就在国贸那里，原来很宽的路，就跟那个店面一样的。我们就在那里待业，搞小瓷器。然后这后面原来是田。原来樊家井就是农村住在这里的。后来拆掉了，我们就慢慢从里面迁进来。然后慢慢就做店面做起来。原来这里没有瓷器的。

Jane：原来这里作坊比较多是不是？
男：原来作坊也不是很多。就是九几年以后，后面作坊，前面店面。开始这里都是人家种田的。就跟农村一样种田的。房子也都是平房。就是九几年才开发出来的。就是九零九三那时候开发出来的。因为市里把我们厂里的工人全部买断了，没事做了，就搞了待业一条街给我们。

Jane：就在国贸那里？
男：就在国贸那边宽宽的马路那里，后来把店面拆掉了做了马路。原来国贸是东风瓷厂。然后把瓷厂卖掉了，然后就做了那个。

Jane：那你原来是那个瓷厂的？
男：我原来是艺术瓷厂的。景德镇十大瓷厂都卖掉了，没有了。艺术瓷厂都是名人名作，原来是搞粉彩的。

Jane：我有去过莲社北路的。
男：那个就是艺术瓷厂的办公室。

Jane：有很多名人名作在那里。
男：原来艺术瓷厂的毕老虎的很有名的，他的女儿叫毕莲芳。她现在也是景德镇陶瓷美术专家也是。原来景德镇啊瓷器最好看的就是艺术瓷厂的。为什么呢？它的画工相当好。就像珠山八友的。雕塑瓷厂搞雕塑的。还有颜色釉的，就是建国（瓷厂），就是三阳开泰的颜色釉。我原来就是艺术瓷厂搞工艺美术，画画的。

Jane：就是技术组的？
男：画人物的。

Jane：那你这个是画动物的。那你艺术瓷厂买断后……
男：买断后就自己搞。

Jane：那这样效益上有比较好吗？
男：效益上就看自己的手艺，自己拣一个胎子，自己画。画了就自己卖。

Jane：你就自己一个人，没有请工人吗？
男：没有。自己搞。

Jane：所以你自己买白胎自己画。
男：你要看窑就到作坊去。他们那里什么都有，从泥巴到瓷器。一条龙的。他们都是自己买泥巴来利坯，拉坯，利坯，吹釉，画青花，雕刻，烧窑。从石头采矿出来他搞不到那个。那个到古窑去查。

Jane：所以你在樊家井也算很长的时间了？
男：我啊，八年。我开始是在前面。

Jane：在国贸那边？
男：嗯。开始的时候这里没有店面，就是两家的人在这里搞搞作坊，瓷器到前面去卖。后来前面拆掉了，国家用来做马路了，做房子了，我们就从外面迁到里面来了。

Jane：那这几年房租有什么样的变化？
男：房租涨了有百分之百。原来这里是一千，现在涨到两千四，涨了百分之一百多。
Jane：所以就是说八年来，房租从一千块钱涨到两千四。
男：八年前？八年前这里才两百多，不到一千。涨了百分之一百多。九几年的时候才两百多块钱。原来这里没生意。
Jane：那你们对于房东涨房租有什么看法？
男：物价涨了，他也涨了，没办法。这里混得下去，他涨价就涨价。涨也是应该的。全国都涨了。外面的房租也涨了。
Jane：那今年涨了吗？
男：这两年都没涨。这两年生意本身就是不太行。瓷器就九十年代最好卖。到了2000年生意都较差一点。特别是搞展销瓷以后，我们仿古瓷就差点。
Jane：那为什么？
男：因为带瓷器出去，老板就不来买房了。
Jane：他们带仿古出去？
男：他们展销的都带仿古出去。他们卖了，那地方的老板就不来我们这里买房。就在展销的地方调货就是了。原来他们老古都在这里调货。
Jane：那么这几年，那一部分的客源比较少。
男：客源少也就是说外面开店的。
Jane：包括海外的吗？
男：海外的有，但不太多了现在。现在有也就法国的，还有越南的。法国的跑得少，一年就一趟两趟。现在澳门的也跑得少。他们展销货也有到外国展销的。你们那里肯定也有。今年的市场绝对差了，世界的市场都差。没事干，都没钱了。大老板都不回来了。股票也跌得一塌糊涂。谁来买瓷器？没钱了，世界的经济危机。
Jane：你是画青花吗？
男：我是画粉彩。
Jane：这个属于仿古还是你自创的？
男：仿古。这条街都是仿古。
Jane：但是有些人还是有一点创新嘛。
男：有。
Jane：那你看樊家井这八年有什么变化吗？
男：我觉得都还是在这里混饭吃。生意好的就多待些，生意不好的就回家了，就关门了。樊家井没有什么变化。
Jane：商家有比较多还是少？
男：我要跟你说，他买了这个瓷器生意好，他就多买一点。外面的生意好，他就到景德镇的瓷器就多买一点。他本来一个月跑一趟的，生意好就半个月跑一趟。生意不好就跑一个月，再不好半年一年跑一趟。以后就不来了。樊家井的变化没什么。这两年的瓷器不如前两年。
Jane：四五年前它不是要迁新都嘛？
男：迁新都是这样的。市政府没搞成，要把我们赶过去。一部分人走了，一部分没走。新都买房的人不认识，第一次到那个地方，跟这个地方十年的地方，你说哪个生意好了？走了一部分，一部分留在这里。一部分发财了，一部分饭都没得吃。所以都回去了。有一百个人，放五十个人过去没饭吃，五十人发财，发财发在这五十人，谁走啊？刚刚出来有谁知道新都在哪里啊。外地人知道新都在哪里啊？全部去，樊家井一个人都没有，老板就要到新都去。就是这个道理。一般谁去？开始是叫我们到那里去，叫不动。市里面没怎么管，叫两声，谁去啊？那里没钱挣谁去啊？那里饭都没得吃。这里卖得动瓷器。
Jane：那边都是以作坊为主，不是店面为主。
男：关键就是那个。这里靠近火车站好点。
Jane: 这里地理位置好。

男: 位置还好。老板一下火车就知道樊家井有个陶瓷市场。为什么国贸生意还好，就是一条道就过去了。像一条龙的企业，过一条马路就到了。到新都，都到旅游区去了，到那哪里去买货？打的过去。还有西客站也有店面。那个店面还没有这个好。

Jane: 它的配套设施没有这里好。

男: 这里一个仿古地区一块，专卖仿古的，好一点，第二，靠火车站好一点。这个没有十多年也有七八年的历史了。老客户来了，第二靠火车站也近啦，第三个这个历史也久，有十多年了。那个西客站没有做两三年，也才刚刚起来，跑仿古的也知道。

Jane: 那景德镇除了樊家井外还有什么市场是比较成熟的？

男: 樊家井，国贸，金昌利，金昌利是卖日用瓷多。国贸过来就是金昌利啦，都是连着过去。都是一条龙画图线。

Jane: 就是国贸，金昌利，樊家井这一块。

男: 就是这一块生意好点。因为这个是连着的一条路线。

Jane: 那你平时是给人家买白胎？

男: 是。我到人家作坊去买白胎。

Jane: 一般是去哪里的作坊买？

男: 就是我有一个同学在老厂知道吧？他那里帮人家利坯。两千块钱一个月，我就在那人家家里买白胎。

Jane: 老厂那边是不是卖白胎的比较多？

男: 卖白胎的是……卖白胎的也有。

Jane: 那那边还有作坊吗？

男: 有！做！

Jane: 现在还是有很多作坊。

男: 是。

Jane: 那你怎么看现代的工艺瓷呢？你们做仿古的会怎样看现代的工艺瓷？比如现代大师的作品之类的。

男: 现代工艺瓷，我对那个不感兴趣。他们是搞名人名作的东西。他们画两笔就值钱。名声在外。我们是搞仿古的。仿古跟工艺瓷不太一样。仿古跟工艺瓷是不相干的。仿古就是仿古，仿原先的，康熙咯，清朝，明朝咯。这个就是仿古的仿清，仿明的，仿元的，这就是仿古。他们工艺瓷是创新的东西。这个创新的到莲花塘那条街上有。就是陶瓷大世界里面有。他们有很多名人名作的东西在那里搞。你到那里去问一下，那里的东西都是名人名作的徒弟在搞那个东西。

Jane: 那你觉不觉得说名人名作有借助仿古的精髓的地方？

男: 有。可能有的。他的工笔总在那里。

Jane: 工笔也是从仿古开始的？

男: 工笔写意的。瓷器有好多种，有写意的，有工笔的。有工笔人物。有写意人物。瓷器你说也说不清楚。许多种啦。画面就更别说了。现在的画工跟原来的画工又不同了。年年都有创新。他们读陶研所的就是要创新。他就是要画一点写意的东西出来。或者他的作品得了奖就是他的东西了。

Jane: 他们就是搞创新？

男: 嗯！读陶学院的就是要创新，不然跟我们这个搞一样的就没有味道了，就白读了。

Jane: 所以你就觉得现代的工艺是比较创新的东西？

男: 肯定有创新啦。你到那个陶瓷博览会还没有结束吧？到那那里就有好多创新的东西。

Jane: 很多是现代的东西。
男：现代化的。画的东西画出来的味道，我们看不懂也不太喜欢。外地的人看着好，也看他
们的名气。他们把国画画到瓷器上，他们原来国画画纸上，现在画瓷器上。瓷器烧出来就当
作品去了。
Jane：所以你没有其他亲属在从事这个行业？
男：至今（现在）没有。原来我妈妈也是艺术瓷厂的。瓷厂卖掉都十多年了。卖了十多年没
有卖瓷器了。还卖瓷器干嘛？如果不是混得饱和，我也不搞瓷器。就我的儿子我也不让他
搞瓷器。搞瓷器有什么意思？本身这个瓷器已经烂掉了。读了陶瓷学院的话，就不管他了，
读了也就没有办法。没读这个功夫，搞这个瓷器没啥意思。所以都是外面的人来搞瓷器，景
德镇的人搞瓷器的不是好多。
Jane：景德镇人搞得少？
男：抚州佬啊，外地的，周边的。
Jane：师傅谢谢了。
男： 没事。 要问名人名作就到陶瓷大世界。 问仿古就这里。 白胎就老厂。 这个位置都分开的。
Jane：市场也比较分开。各种各样市场形成了。
男：嗯。

对象 3： 男
特征：在樊家井待得最久的老艺人。
年龄：70 多岁

Jane：我想请问一下樊家井这几年的变化。
男：你叫我讲我也叫不清楚。都是变化。这下面都是以后建的。从这里到国贸都是以后建的，
都十多年了。以前都是老房子，都是十多年以后建的。大部分都是十年以后建的。就这样一
个变化，其它没有什么。
Jane：这个房子是你自己建的吗？
男：都是当地的农民啊，自己建的，卖得都比较少。
Jane：那这个是你们自己买的吗？
男：买了十多年了，建的都是这里的农民。他们都是种菜的，他们建了房子以后，都收很高
的租金。他们收房租就够了。凡是当地的农民，他们一个房子收一万多一个月。一间都是
三千多的楼房，他三间就九千多块钱。还有下面的店面都是一万多。
Jane：顾客的变化呢？来这边买陶瓷的有人变化？
男：这个就要问老板了。这个变化要问老板了。我只能讲表面的变化，这个房子。当地农民
当老板的就少一点，都是建房子。
Jane：所以你是他们雇佣的？
男：我们就是这样跟他们画一件多少钱。他卖好多钱不会告诉我们。我们就是画来吃饭，划得来
就做，划不来就不做。
Jane：所以你一直都在这里住？
男：对一直在这里住，帮别人画瓷器。我们都是打工的，就这么多其它没有了。你要问工艺
瓷跟艺术瓷，还有顾客的情况都要问老板，我们都不知道的。因为我当老板我就跟顾客打
交道，不当老板就不跟顾客打交道。你懂吗？ 就这么回事。
Jane：那你这里是租的还是买的？
男：这个要问老板，我们是在这里打工的。
Jane：那你们画什么都是老板跟你们讲的。
男：对，老板叫我们画什么东西就画什么东西。设计得好不好就是我们的事，做生意的话就
是老板的事。就是跟顾客打交道啊不是我们的事。
Jane: 那你这样子做一个月的工资是多少？
男: 一个月工资啊，两千多块钱吧。
Jane: 那跟十几年前比呢？工资是怎样的？
男: 跟以前比就划不来了。现在生活（水平）高。像以前生活（水平）低，我们的工资还可以。像现在生活高，我们就叫天了。我们觉得生活更难过了。

对 象 4: 女
祖籍: 景德镇本地
工作: 在弄子路口卖杂货（饮料，烟，陶瓷原料）

Jane: 我想请问你在樊家井有多少年了？
女: 我是在樊家井出生的。
Jane: 那请问你从出生到现在樊家井的变化是怎样的？
女: 变化挺大的。比方说人气旺了。还有以前没有这么多店面啊。
Jane: 那从什么时候店面开始多的？
女: 九零年开始多的。以前是小规模的。以前都是矮房子，现在都是高楼了。
Jane: 都是农民自己建的吗？
女: 对！
Jane: 所以你原来就是在樊家井出生的。那你们有自己的房子。
女: 对。都是自己的房子。
Jane: 那你们的房子都是出租出去的？
女: 嗯。
Jane: 那你们的收益很好了？
女: 收益就是最近几年。以前那个矮房子没有什么收益。从零三年开始，这里稍微好一点。现在的房子高一点。
Jane: 你一直都是卖这个杂货的吗？
女: 一直是卖杂货的。
Jane: 那家里的房子涨价了，为什么还在这里卖？
女: 涨价了，店面缺少，如果占一个店面要花很多的钱。这个小生意赚不到店面钱。所以就在路边摆。
Jane: 然后把家里的店面出租出去。
女: 对。
Jane: 那你们家的店面出租出去应该会是蛮好的收益，那为什么自己还想出来摆摊？
女: 那都是父母的，我们子女还要自食其力。
Jane: 所以是父母收的房租。那你为什么没有考虑做陶瓷生意？
女: 最主要是对那个没有兴趣。我们没有兴趣。
Jane: 你们原来住在樊家井的人对陶瓷没有兴趣？
女: 主要是我个人没有兴趣。
Jane: 那也有人在做吧？有当地的农民在做吧？
女: 有有有。农民的子女啊在做。
Jane: 那你在这里摆摊有多久？
女: 我们是九二年开始摆摊。
Jane: 那你观察人来人往，跟你买东西的人。
女：这个也分季节性的。也分时间。像星期一星期二星期三人多一点。星期四到礼拜天人少一点。也有季节性的，上半年刚春月的时候要火一点，再来就是中秋节后要好一点。六月天没什么人。
Jane：那这边的客户都是哪里人你知道吗？
女：那好多啊，好多地方都有人来。
Jane：以哪里人为主？
女：那也说不清楚。河南的，抚州的，广州的人都有，还有乐平的也有人到这里来做生意。好多地方啊。这里人杂。
Jane：那你们在这里做生意，九二年到现在那一年的生意比较好？
女：从非典的时候稍微好一点。2003年（八月）。
Jane：所以就是非典的时候樊家井的人也多一点。
女：应该是 2000 后开始要好一点。
Jane：像四五年前要转新都吗？那你们当地的农民是怎么看的？
女：那肯定是不能有的。我们现在田地全建了，没有收入，没有工资了，就靠这个房租。那肯定是不让走的了。
Jane：那年你到村里面，村委会有没有开会？
女：开会他们是有他们开会的时候。
Jane：就是不让搬出去这件事。
女：那个村里面没有决定就是我们农民直接跟市政府交涉。
Jane：听说那时候还打了官司？
女：没有吧。没有闹那么大，就是协调一下。
Jane：现在没有搬出去嘛，农民的收入也是高，因为他们的房租一直在涨。
女：现在没涨了。
Jane：大概多久时间没涨了？
女：两年吧。
Jane：为什么没涨？
女：两年生意淡好多。
Jane：如果涨的话他们会搬走？
女：不会搬走，他们接受不了。
Jane：那你会不会很希望继承这个房产？
女：我们这里思想还是很传统，都是男孩子继承的。
Jane：那你结婚了吗？
女：（点头。）
Jane：所以女的没有。那你先生是这个村里面的人吗？
女：他不是。
Jane：所以樊家井兴旺起来对你们也是很有好处的？
女：那肯定是了。
Jane：对你个人呢？
女：也有好处啊。我们现在到这个年纪到外面找工作是找不到的。
Jane：你原来的工作是什么？
女：我一直在这里没有参加过工作。
Jane：那时候迁新都，农民起来的话是所有的农民吗？
女：也派代表。
Jane：你父母也有参加吗？
女：有。
Jane：这里大概有多少农民？
女：也说不清楚。

对象：男
年龄：五六十岁
职业：房东

Jane：老人家我想樊家井这几年的变化对你们农民有什么收益？
男：收益啊？也不一定。两年跟两年不同，有时候生意好点兴旺一点，有时候生意不好，不兴旺。

Jane：但是这两年算是比较兴旺的吧？
男：这两年不行，非典那个时候还行。非典以前还可以，非典之后就不行了。

Jane：那你们对政府的政策是怎么看的？政府很多的政策都要搬樊家井对你们农民来讲你们是怎么看的？那时候不是要迁新都吗？你怎么看？
男：我没同意。我们就没有生活来源了。跟市委讲了。

Jane：那你们那时候是怎么组织的？
男：没有组织。大家就一起。没有组织。

Jane：你们没有组织怎么走到一起的？
男：没有生活，大家就走到一起了。都是为了生活，没有得吃，没有得维持。田也没有，山也没有。没有退休工资，没有生活费。

Jane：那有没有跟政府讨论一下怎么改善樊家井？
男：没有没有。

Jane：那你现在的生活算是比较好，比较宽裕了？
男：一般啦。比种田要宽裕一些。

Jane：那你后面都是租给作坊吗？
男：作坊有。

Jane：那你们是住在房子里面？
男：嗯。

Jane：你们一般都是住楼上吗？
男的女儿：也不一定啦，一般都是住二楼三楼。四楼五楼就租给别人。

Jane：那是几年建的？
男：九几年。

男的女儿：九八年建的。

Jane：那你们就是把店面整修了，你们现在有四个店面？
男的女儿：嗯！建房子的时候都是借钱建出来的。收房租来还债。

Jane：那四个店面房租也不少。
男：那个时候房租不涨的。

Jane：现在四个店面也有一万块吧？
男：没有。

Jane：一个店面大概有多少钱？
男：两千块钱。

Jane：一个店面两千，四个店面就八千。那债还完了吗？
男：债啊，再过两年还完。
Jane：这里面有做白胎的？
男：做白胎的有。

对象 6：男
年龄：三十多岁

Jane：请问你们是做白胎的吗？
男：我们是做颜色釉的。
Jane：那你们是从拉坯到烧制都是自己家做吗？
男：嗯。
Jane：那你们有自己的窑？
男：没有窑。
Jane：都是跟别人搭烧的？
男：嗯。
Jane：那你们有店面吗？
男：店面有。
Jane：那你们在你里面的话平时怎么晒？
男：不用晒。大件就要晒。
Jane：那你们在这里有多久？
男：有几年了。没有十几年。有两三年。
Jane：这两年收益好吗？
男：不好。
Jane：生意从什么时候不好的？
男：从 07 年吧。生意不好。难做得很。
Jane：订单比较少？
男：哪里还有订单。
Jane：这个是属于琢器还是镶器？
男：属于琢器。
Jane：是属于注浆的吗？
男：这个是属于注浆的。
Jane：你们的客户以哪里的人为主啊？
男：以展销的人为主。
Jane：那他们都是跑哪些地方？
男：那我就不清楚了。跑展销的他们到处有地方就跑。他们也不一定的，今天跑北方，明天
跑南方。组会的人到什么地方他们就到什么地方。
Jane：全国各地跑展销的人都有跟你们拿货的是不是？
男：拿的多了。
Jane：但是他们没有订，都是拿现货？
男：嗯。他们跑展销的，都是不开店的。
Jane：现在跑展销的还是多？
男：不多。越来越少。赚不了钱。
Jane：但是你们店里面还是以跑展销的为主。
男：嗯。开店的也有，来得少。
Jane: 那你们一个作坊的话有多少人来帮忙？
男: 我自己一个人做。
Jane: 那看店呢？
男: 看店别人看店。
Jane: 你请人看店吗？
男: 请不起人。都是自己家人。
Jane: 就是你老婆？
男: 嗯。
Jane: 所以除了你和你太太基本上没有人帮忙了？
男: 基本上没有了。
Jane: 没有父亲母亲？
男: 他们做不动了。
Jane: 你做完型以后就上釉就下去烧？
男: 嗯！
Jane: 那你就不用像别人要画要刻？
男: 那不用。要的话肯定要请人。
Jane: 如果有订单的话就请人？
男: 嗯，因为那个我们做不了的。要做，就要请人。
Jane: 所以你之前就是做成型的？
男: 对对对。
Jane: 你是瓷厂的吗？哪个瓷厂？
男: 艺术瓷厂。
Jane: 那你们艺术瓷厂原来搞工艺瓷吗？
男: 主要就是陈设瓷。
Jane: 仿古是陈设瓷的一种？
男: 仿古是陈设瓷的一种。仿古就是一些装饰品。
Jane: 那原来艺术瓷厂呢？
男: 全部卖掉了，全部租给人了。
Jane: 你现在自己出来做有比以前还好吗？
男: 在厂里做拿工资肯定要少一点。出来做比工资还是要高一点。但是也有不好的地方。比如说这个我们做出来了，可以活得过去，但是没有做出来就没有拿工资好。
Jane: 就是有技术的好，没有技术的就不好。
男: 那肯定了。艺术瓷厂里面出来好的人还是多一点。因为艺术瓷厂做陈设瓷，不是做日用的。像日用瓷的厂要差一点。做陈设瓷，我们艺术瓷厂做的人多，都可以赚到钱。
Jane: 那你以前学画的吗？还是做成型？
男: 我以前是做成型的。所以比他们还要差。
Jane: 但是成型的做颜色釉也没有差很多。就是这个做出来了肯定比成型的工资还强一点了。如果没有做出来的，我们的同事很多，他们在外面打工，还不如在厂里。
Jane: 那四五年前要迁新都的时候你们是怎么想的？
男: 四五年前啊，我们都是小作坊随便的。那里起来了，我们可以过去。没起来啦，我们也无所谓。我们做这个随便一个地方就可以容纳下的。这么大的地方就可以了。他多一点作坊要考虑窑啦，什么东西的，他们那个时候可能会考虑一下了。有迁过去的，但那里没有起来啦，就慢慢的……如果不要窗口的话，去那里也比较方便。去那里做订单比较方便，因为地方大一点。
Jane: 租金也便宜一点？
男: 租金差不多。这里便宜三百。
Jane: 店面比较贵一点是不是？
男: 店面贵一点。
Jane: 这里大概有六七十平方米吧？
男: 我们不是按平方，新都是按平方。我们这里是私人的。因为我们这里没有晒场就便宜一点，如果有晒场就贵一点。不需要晒都是小东西。放放就干了。
Jane: 那楼上也有作坊？
男: 楼上也有。楼上作坊，也有晒的地方。
Jane: 这里有几层楼？
男: 这里有六层。
Jane: 那他们晒的地方都是伸出去的？
男: 像阳台一样。
Jane: 所以他们上面就贵一点？
男: 上面比下面肯定要贵一点。
Jane: 所以你下面是三百块钱。
男: 上面就四百块钱。
男: 新都没有人去。就是这两年天然气涨价的时候去了一点点。对做大件的有影响。
Jane: 这为什么会这样呢？
男: 因为罐气涨价了，他们管道气就便宜一点了。去年很多做大件的就去了。像我们这种在这里烧也便宜，因为东西小。烧一个一块钱。这个价钱不高就无所谓。大件的他就不行了。他一窑，在这里烧六百，在那里烧四百，他一窑就便宜两百。他们是这样算的。我们这样的小东西无所谓。价钱本来就不高。
Jane: 政府有多少次说要改造樊家井，说要搬？
男: 那有很多次。我知道可能有三次吧。
Jane: 有一次是新都？还有两次呢？
男: 可能是因为这里是居民密集的地方吧。它窑太危险了。它危险，出了两次事的时候可能就着急一点，让它搬，还没搬。我们是希望可以搬的好。
Jane: 为什么新都没有店面都是作坊？
男: 对。它地方大，租金也不便宜。我不用那么地方大。它就贵一点了，你算一下平方，它要七八百一个月吧。它按两层楼三层楼。我们不要那么地方大，就（不划算）。那个新都没有起来，如果新都起来的话，还是陶瓷城起来的话，那价钱可能要比国贸便宜一些，比樊家井要便宜。那里地方大，走起人来也方便，拿东西也方便。这里这么小，像我们上班下班人多得不得了。没办法。他们还不动。客户也是太远了他们也不愿意去。他跑那么远，拿货不方便。Jane: 这里的地理位置还是比较理想。
男: 地理位置是他们也理想我们也理想。但是就是很多不方便的地方。就是弄太小了，你要进什么材料，要进来也麻烦一点。大板车还好，汽车就不行。
Jane: 大板车的话一趟要多少钱？
男: 那要看路程了。现在一般的话从旅行社到这里要七八块钱。

7.4.2.3.14 Interview 18: Mix, Fanjiajing, 20081024

Interview Transcription 18 20081024
对象 1：男
年龄：21-22 岁
职业：锦盒
祖籍：抚州

Jane：你们定做锦盒的顾客群都是哪些人？
男：都是跑瓷器的。
Jane：具体来讲跑瓷器的就有跑展销的。
男：都有，国外的也有。
Jane：那店里面有给你拿锦盒吗？
男：也有啊。
Jane：你们在这里做了多少年了？
男：好几年了。三到四年吧。
Jane：那这三四年间当中生意来讲有什么样的变化？
男：这个也说不定。有时候生意好有时候生意不好。就要根据他们卖瓷器的。他们卖的量多，
我们这个锦盒也销得快。
Jane：相比四年前，现在锦盒卖得比以前多了还是少了？
男：比以前少了，一开始是很多。最近瓷器生意不怎样。
Jane：你是哪里人？
男：江西抚州。
Jane：这里有很多抚州人，抚州人在这条街上做锦盒的人多吗？
男：多啊。
Jane：做锦盒的基本上都是抚州人吗？
男：都昌的也有。
Jane：所以就抚州跟都昌两个地方做锦盒？那你们在这里租这样一个房子租金要多少？
男：四百。
Jane：包括后面？
男：后面不是。
Jane：那你们生意还能维持得过去？
男：有生意还是可以的。没生意就不怎么样。没有生意，我们就在这里玩。
Jane：那你们囤货囤得不多嘛。
男：我们从来不囤货的。都是定做。
Jane：就是人家要什么尺寸的，就定做。
男：是啊，从来不压货的。
Jane：那你们做这个作坊也请别人来做吗？
男：当然要啦，就是请不到人。有时候是工资比较低他们不愿意来。
Jane：所以你们都是自己家人在做？
男：一般都是自己家人，有时候是亲戚啊。都是家里的，乡下的。
Jane：那你们在这里是有亲戚才过来的吗？
男：是啊，我大部分的亲戚都在这里。
Jane：都是做锦盒的吗？
男：不是，有些是做陶瓷的。
Jane：那你做锦盒都是跟谁学的？
男：都是带出来的。他说做锦盒怎么样好就过来学一两天就可以了。
Jane: 学一两天就开始做了？
男: 嗯。这个很简单啊。不难。做这个本来就很简单的。
Jane: 所以你就是跟亲戚学了一两天，亲戚做锦盒的就带着你，这样？
男: 嗯。
Jane: 你大部分的亲戚都在樊家井吗？
男: 到处都是啊。都是住得很散的。
Jane: 所以这个生意是属于你的还是你的哥哥的？
男: 我哥哥都没有做。他在跑瓷器。
Jane: 他在跑展销吗？
男: 摆摊啊。
Jane: 摆摊生意比较好？
男: 亏本啦，今年都是亏的。
Jane: 所以今年总体来讲就是？
男: 今年的生意比去年的生意还要差。去年也差，今年也差。
Jane: 那你觉得说以后有起来的可能性吗？
男: 那我也不知道。这也说不准。
Jane: 听说很多人今年改行？那你有想过要改行吗？
男: 有想啊，但是还是不知道该干啥。
Jane: 但是你们现在还是可以维持生存的。
男: 做瓷器嘛，最近瓷器生意不怎么好做。刚开始还比较好，中间也可以。我自己刚开始也是做瓷器的。
Jane: 你自己也是学过？
男: 学过。我当师傅都已经当了两年了。
Jane: 那为什么不继续做瓷器？
男: 现在瓷器生意这么差怎么做？
Jane: 你是做雕刻还是什么？
男: 利坯的。
Jane: 所以你是利坯师傅，三四年前改做锦盒？
男: 我是都会做。
Jane: 那你没有让人聘用做利坯吗？
男: 有。
Jane: 所以也是有人请，也做锦盒。
男: 有人请就做。没人请就自己搞了。都是自己的。
Jane: 这条街上抚州人多吗？
男: 大部分都是我们抚州人。就是整个樊家井都是我们抚州人。
Jane: 那都是亲戚朋友吗？都是认识的吗？
男: 这条街上还可以。
Jane: 就是第一条街上。二三街也都是抚州人吗？
男: 都是。我是说整个樊家井都是。
Jane: 那你们平常会有什么聚会吗？像同乡会之类的。
男: 没有。没有。在一起玩的人才有。
Jane: 只有在一起玩的人才一起聚会，平常都是各干各的。
男: 对。
Jane: 那有事出事的时候会一起来吗？
男：会啊，那抚州人肯定会团结。
Jane：所以抚州人比较团结。
男：嗯。那也要看是什么事，如果是小事的话还用得着嘛，根本用不着。
Jane：如果大事的话就会团结。
男：嗯。吃亏的事就会团结，如果不是很严重的话我们这群人私底下就搞定了。
Jane：那你有听说三四年前他们要搬新都民营陶瓷园吗？
男：搬到现在也没有怎么搬。
Jane：那你希望过去吗？
男：对我来说没有什么希望的。过去没有这里好。没有什么生意，他们这些卖瓷器的跟开作坊的都不愿意搬。就是这样子。搬过去没有什么生意。太远主要是太远，对那些买瓷器的人也不方便。
Jane：那你们从农村出来的话都是一个人出来还是一群人出来？
男：一开始也谈不上一群一群的。如果我出来，我在这里待得好，我就把你叫出来，就这样一个一个出来的。
Jane：就是说一个一个带出来，朋友和亲戚。如果你出来好的话，你就会让他出来。
男：那肯定会把他带出来。
Jane：如果你们不在这里的话，在家乡一般做什么事情？
男：这我就不知道了。我在家乡待得好少。
Jane：一般在家有田地可以种吗？
男：我家都不种田，没有田种。我们都不愿意种田。
Jane：一般年轻人都喜欢出来外面做？
男：一般田地都给了别人做。自己没做就给别人做。就是每年回家的时候拿多少钱给他就是了。
Jane：那出产属于你们的？
男：他自己的。
Jane：但是你还要付他钱？
男：就是田地都是自己的。但是如果我放在那里不做，就会有些管理的来干涉，就是不可以荒废掉。所以我家里没人做就给别人做。给别人做之后，就每年给他多少钱。而且他们的收入都是自己的。
Jane：你们还要给他们钱。但是宁愿这样子你们也不自己做？那出来有比较好？
男：我比较喜欢在外面。
Jane：那你家里的朋友有都在这里吗？
男：没几个。就是跟我在一起玩的没几个。都是在这里认识的。
Jane：你从很小就过来了是不是？
男：十七岁吧。
Jane：那你过来几年？
男：四五年。
Jane：那你最近生意怎样？
男：差，就是差。
Jane：你们一个锦盒卖多少钱？
男：那要看怎么样子的。
Jane：这种大的（约30公分高）。
男：三十块。
对象2：男
年龄：30岁左右
职业：烧窑户雇工

Jane：你是烧窑的是不是？这个窑是你的？
男：不是。
Jane：你是来帮忙的？
男：打工的。
Jane：就是每天来烧窑。那你们这个窑一个月要开多少次？
男：有窑天天都有。
Jane：这个属于多少立方的？
男：这个两个多立方。
Jane：你们客户就是樊家井的吧？
男：不。全国各地都有。
Jane：他们怎么拿东西过来这里烧呢？
男：拿担子挑过来。
Jane：不只是樊家井的？你们也做其它地方的生意？
男：到处都有。
Jane：一天一般烧几次？
男：烧一次。
Jane：今年生意怎样？
男：今年生意不行。
Jane：那你们什么时候的生意比较好？
男：这个讲不清楚。
Jane：你们一次要用多少罐（液态气）？
男：四罐。

对象3：江师傅
职业：烧窑师傅
年龄：50多岁
祖籍：景德镇人

Jane：那你们一个月要烧窑多少次？
江师傅：这个要看生意，要看市场。
Jane：这几年生意怎么样？
江师傅：今年生意稍微差一点。
Jane：你们这个窑从什么时候开始烧的？
江师傅：有十年了。九八年开始烧。比我们早一点的也有。
Jane：这个是多少立方的窑？
江师傅：这个有 5.6—5.7 个立方。
Jane：那么你们有每次都满窑吗？
江师傅：这个要看生意了，生意好点就天天都有。如果市场走不动那个瓷器，那么作坊就不
好。今年差，今年比往年来都差。十年以来今年是最差的。本来这个季节天天都有窑烧。现
在市场走不动了，产量呢就往下掉。关键我们这个窑就是根据市场需要。市场需要多少我们
江师傅: 这个还要看液化气和管道气的利润。我们不是烧管道气的，我们是烧瓶气的。就要根据石油的价格，因为这个气是石油提炼出来的。它跟天然气又不同。就是液态气跟管道气就是不同。就是石油往下调了液态气也跟着往下调。石油往上涨了，这个液化气也跟着上涨了。

Jane: 最近石油有下降了。

江师傅: 这个液化气也跟着往下降了一点。

Jane: 那么烧一个满窑可以挣多少钱?

江师傅: 这是烧一个满窑可以挣多少钱？江师傅：这个钱，利润没有一定的。还要看这个烧窑师傅。本来这个是满两层的，他只满了一层，这个利润就下去了。本来可以满两层的，现在满一层这个空间就浪费了。还要根据这个品种，多满一点坏利润就高一点。这个空间浪费了，还没有了。

Jane: 他就这样搭起来，然后就送进去？

江师傅：对。

Jane: 怎么送进去?

江师傅：有轨道。这个烧出来这边出来那边进去。怎么叫梭式窑呢，这样就叫做梭式窑。一进一出，一进一出。这个就叫做梭式窑。

Jane: 你们是哪里人？

江师傅：我是本地人。我们在景德镇土生土长的。

Jane: 这里的窑基本上都是本地人做的吗？

江师傅：也没有。这没有一定，也有外地的。也有外省的。他们来景德镇学徒。然后有自己的窑就自己搞。本来学徒，有钱了，就自己做一个窑。

Jane: 那你们隔壁这一家是？

江师傅：是抚州的。他也是听说这个窑赚钱，然后从抚州过来，到景德镇来赚钱。因为我在景德镇，我比他早，我做窑比他早。

Jane: 那你都是做老顾客？

江师傅：嗯，肯定。但是新顾客也有。他们其它个窑或者停窑，那个坯没有了他就过来。关键就在于这个窑的烧成的亮度。烧制青花，烧得好，他们就到我这里来。它管道气质量要比回液化气差一点。它管道气烧的温度低。烧釉面它就稍微差一点。

Jane: 他是管道气？

江师傅：不。我们樊家井也有两家是管道气的。他价格便宜。比方我这里烧十块钱，他就八块，六块。他便宜因为他管道气的价格便宜。人家就图这个便宜到那边去。他虽然是便宜，但是他烧的质量不行。他帮人家烧的产品质量不行，价格卖不出去。最后还是到我们这里来。

Jane: 那四五年前不是说要迁新都吗？

江师傅：对。他们都到这里来。好多新都的都到我们这里来，要求我们搬。但是我们成本都投在这里，这样损失大。一般个人承受不了。我们干了这么多年。

Jane: 如果说要搬过去，你是不是要把这些全部割掉?

江师傅：肯定要割掉了。没有用了。然后把整个窑运过去。新都那边是优惠，政治是这样子的，还要根据个人。有利润有钱，我们肯定搬到那里去。还有有没有市场，没有市场我们搬到那里去也赚不到钱。

Jane: 所以那时候你们都采取观望态度？

江师傅：也不是观望态度。我在景德镇土生土长也知道，毕竟新都那边人也少，交通也不方便。人家买两个瓷器，提上提下上公共汽车。这里上火车，上什么车子都比较方便（指樊家
井）。现代人都看实惠，新都太远了。那时候我们都采取没有办法了。市政府给我们一点优惠政策，给我们一点优惠政策，我们肯定是亏不起的。给我们几千块钱又有什么用。我们大家的辛苦钱，四五万，六万七万投资在这里，你给它割过去，就亏不起了。

Jane：所以那时候政府的优惠政策不算是非常优惠。

江师傅：当然不是非常优惠，不然他们把这个买下来，我们亏是亏一点都不要紧。他给我们几千块钱，这个差别太大了。后来人家就亏不起了。不管是樊家井也好，里村也好，都一样的，大家都亏不起这个钱。倒了人家都不会迁移了。

Jane：所以那个时候已经有一部分的人迁移了，听说有一半的人。

江师傅：有。但是有的人是在新都买了房子。像我外甥在那里买了房子，他就从樊家井搬过去了。他在那里买了房子，在那里搞作坊一条龙。现在还在那边。姓张，张云发。

Jane：那他现在还在新都搞一条龙。

江师傅：现在也不是一条龙。他儿子会利坯。自己会烧窑。他就自己搞一点，请别人来搞吧，肯定要少赚。

Jane：从樊家井搬过去的窑有多少座？

江师傅：我们樊家井也有一个老板搬到那里去做。他把窑卖掉掉了，在那里做了一个新窑。原来我们樊家井姓吴的。吴东蓝。就在新都做了个窑。大概是四个立方多一点。没有市场，没有货源。他就把窑卖掉，卖了一万块钱。那时候他那个窑花了四万到五万。他那个是新窑，一万块钱卖给我外甥。

Jane：所以他现在搬回樊家井？

江师傅：他樊家井也有窑。因为他没有市场。那时候市政府给了优惠政策，樊家井要搬迁啊，怎样的。他新都那个窑亏了，他那里半年多。还包括整修。刚好张云发在那里买了房子自己搞，就给他买过来了。

Jane：所以张那时候买得很便宜。

江师傅：当然便宜了，那时候他是花了四五万块钱的。他没有生意啊，没有货源啊。他放着也是放着，他没有生意啊。他也亏不起了，就转让，卖给我外甥。樊家井早晚会拆。樊家井以前是村，是农民。我以前是有单位的，现在下岗的下岗。

Jane：你以前是什么单位的？

江师傅：我以前是医药公司的。后来没有办法了，公司也不太景气了。后来我们大家都下来了。下来后找出路。那时候我外甥会烧窑，他就教我。后来我就一直烧窑。这也是第二个窑。原来那个窑烧了两年也有点旧了。以前烧窑质量不怎么样，没有烧好。再来我这个房东是租地方，后来改建。就把要拆过来这个地方。重新做过了，做到后面，跟生活区隔离远一点。当时根据窑炉的政策，跟生活区隔离三十米。所以就做得后面一点。

Jane：那你们这个应该没有发生过事情。

江师傅：这个没有。讲到今天为止，还没有。我们都考核了，都有执照。我们都经过评定，他们经常来检查。以前都烧那个炉灶的，现在都改成液体了。安全一点。以前是气体都要通过加热。

Jane：以前都会拿炉灶去烧。

江师傅：对。那炉灶去烧。那就危险了。万一钢瓶漏气，就不好了。现在这个液体的比较好一点，安全一点。

Jane：像今年这样一个市场的话，你们能够生活得下来吗？

江师傅：勉勉强强吧。

Jane：就是比较希望市场再起来。

江师傅：对。市场起来的话，我们都可以。关键市场，我们是靠市场，靠市场生存的。市场也靠我们给它行动的。都是互惠互利的。我们不烧炉，市场也没有：你们市场好也要靠我
们给他们烧炉。给他们保证，提供烧炉。都是这样子的。
Jane：那你们今天还要在烧一次？
江师傅：今天的已经烧了，在里面了。刚开始烧。明天烧完，拖过来，这个再拖进去。以前
新都很多人过来了解。
Jane：但是新都的设计还是有问题。
江师傅：对对对。有问题。相当有问题。我也去过。邀请我们到那里参观一下，到那里看一下。他这个窑炉的设计不太方便，不太合理这样子。
Jane：他们就是这样子建，没有店面。
江师傅：啊，店面也没有。
Jane：作坊就是作坊。
江师傅：对就是作坊。他们搞一条龙这样，好多人都发表了自己的看法。
Jane：他就是先建了，再寻求你的意见。不是说还没建，在收集意见。
江师傅：对对对。
Jane：就是这个问题。
江师傅：不是这个问题，这个要根据窑炉的大小，我这个窑炉是多少立方米的，你就建多高。
你大一点的，要做高一点，就是大窑。你不能想怎么搞就怎么搞，那个没有用的。不适应啊。
Jane：那中国陶瓷城你有了解过吗？
江师傅：中国陶瓷城没有了解过。但是也去过，就是去得少一点。
Jane：那你觉得他们设计有什么缺点？
江师傅：中国陶瓷城我在那里买了房子。买了一个复式楼。现在没用租出去。一个月五百块
钱有什么用？下面还店面呢，一二三层。就在西客站隔壁。
Jane：你一次就买了三层啊，连店面？
江师傅：没有到那边去了。那边没有生意。我们在景德镇这边烧窑对别的市场了解也少一点。
Jane：中国陶瓷城原来也是要做陶瓷市场的嘛。
江师傅：陶瓷市场嘛，就我们景德镇的人讲，那里是河西，太远了。关键是交通。因为我在
景德镇土生土长，我知道哪里比较繁华一点。现在买一个陶瓷不就图个方便吗？
Jane：那边不是也有一个西客站？
江师傅：对啊，我钱都投在那里拿不回来了。现在租给别人五百块钱做什么办事处。
Jane：他们说中国陶瓷城的屋顶是封顶的，是不是？
江师傅：基本上都是封顶的，也有平顶的。
Jane：那像现在在景德镇比较成型的市场有哪几个？
江师傅：现在要搞陶瓷市场集中的都在市区。人也比较集中。你在那里人也稀稀散散的。你
在市区外搞一点旅游区可以。搞一点景德镇的名胜古迹在那里。回来在市闹区在繁华一点的地
方买瓷器。搞大型厂房你的面积肯定要大一点，地方大一点。你搞店面就是要在市区，不要到郊区，郊区太远了。坐车子还要时间才能回来，你远一点车子还赶不上。还打的回来。
公交到十点最后一班车，到十点以后就没有了。到了下午四五点钟那里几乎没有人了。在我
们市区还是好一点，回家就近一点。
Jane：他们说中国陶瓷城的屋顶是封顶的，是不是？
江师傅：基本上都是封顶的，也有平顶的。
Jane：他们说这样子不利于晒坯。
江师傅：对了，不利于晒坯。都没有设计好，一个中国陶瓷城，一个新都。
Jane：所以说它虽然也有政策问题，但是它们都没有设计好。
江师傅：没有根据我们景德镇实际的市场，作坊的需要来做。
Jane：而且他们的地点也不好。如果在沃尔玛这里就好了。
江师傅：相当好这里。比那个陶瓷城还好。这里汽车站，火车站，很方便。
Jane：他们现在还没有建，其实不应该建楼房应该搞市场。
江师傅：对啊。他们现在就是建商品房住，不懂得搞市场。我在景德镇土生土长，什么东西都比较知道。新都那边是地方好，关键就是那个市场，没有人。没有人那还搞什么东西。
Jane：对啊它没有设计好，公交车才两部。
江师傅：嗯。赶完了就没有车子了。忘记了时间他就忘记了。沃尔玛这块好，还有国贸市场相当好。比陶瓷城那边好得多了。
Jane：国贸这边没有作坊。
江师傅：没有作坊。我们这里几个老板都在国贸都买了店面。他不拿钱投在那边，就看准了国贸。他们那边人比较稀少，没有市场。国贸这里到广场，人多，东西也比较集中。那里没有集中，关键是人。是市场需求。外地的朋友来马上可以到国贸买东西。那边还要赶车子。
Jane：国贸卖仿古的比较少是吧？
江师傅：仿古也有。什么瓷都有。
Jane：所以它是属于比较低档的？
江师傅：低档的。但它地点就比陶瓷城好一点。
Jane：他都是卖高档瓷的？
江师傅：高档也有，在店里卖零售的。他们外省的很多旅游都到我们国贸来。他们不可能到陶瓷城那里。陶瓷城也有，但是那边太远了。现代人就图一个方便。
Jane：一般外地人不懂得坐公交车。
江师傅：打的的也有，开车的也有。到这旅游看看，买点东西。有的都到国贸买。
Jane：国贸卖樊家井也就好？
江师傅：当然了。它有连带关系。到国贸，就到樊家井来看看。
Jane：国贸还连着金昌利是不是？
江师傅：嗯。他们到樊家井来，我要哪种瓷器，反正作坊都有，马上给他拿来。
Jane：樊家井还是以作坊为主？
江师傅：作坊为主。店面一般都是个体户。
Jane：这里是作坊，国贸那边是店面？
江师傅：对对对。
Jane：国贸有很多都在新都生产。
江师傅：国贸也有。可能是市政府搞这个楼房，关了一部分，就搬到新都那里去了。
Jane：老厂也关了一部分。但是老厂没有全部拆掉？
江师傅：没有没有。还有搬到新都去再搬回来的。没有生意啊。还不如老厂地方好。
Jane：老厂都是作坊没有店面？
江师傅：店面都是自己家里的。都是作坊门口自己就搞个店面。人家也图个方便。
Jane：所以老厂那边的生意好吗？
江师傅：他们搞写意的东西。以注浆的为主。我们樊家井基本上都是拉胚的。拉胚的做不赢了，就从那边调，调一点注浆的过来。一般情况下，我们樊家井都是手工拉胚的。因为手工拉胚的比注浆的质量好。各方面都要好一点。
Jane：所以老厂还是要去看一下。
江师傅：嗯。老厂搬到新都后有一部分就搬回来了。没有生意亏本了，后来就又搬到老厂那边去。我都是听他们几个老板谈，跟我讲一下。但今年怎么讲整个市场都不太景气。包括新都。新都现在是有是有，但是都是少量的。他们气便宜，但是利润比较薄。
Jane：我也是有看到拉胚的。
江师傅：也有的。他们拉胚拉不够了，有可能调坯过去，调注浆的。
Jane：老厂是注浆为主。
江师傅：基本上都是注浆的。我们樊家井都是手工拉胚的。今年的生意不行。
Jane: 要烧好了吗？
江师傅：没有，要到六点多钟，窑烧十一个小时。像老厂那边只烧七八个小时。因为他们是注浆，注浆比较容易干。比较薄。但是我们比较厚就难烧一点。你如果有兴趣明天早上来看一下。明天早上八点钟，七点多钟。七点半到八点多钟，我们就要把东西送到店里面去。

对象4：曾先生
职业：作坊老板
年龄：27岁
祖籍：抚州

Jane：你是搞作坊的？
曾：我有两家店，樊家井也有，国贸也有。
江师傅：他产量好大，我这里一半都是他的。
Jane：所以你除了烧窑以外都是自己做的？
曾：也是请人，我自己懂技术。我自己会设计，搞青花，粉彩都搞。
Jane：然后请别人。
曾：自己懂啦，懂技术。
Jane：那你来这里有多久了？
曾：十来年。十一年了。
Jane：那你的作坊里面都是自己的亲戚朋友吗？
曾：不是，都是招的。也有徒弟有一两个徒弟。现在都出师了，技术都比较好。
Jane：那你弟弟都是你的亲戚朋友吗？
曾：不是。都是技术工。
Jane：那你一般招聘都是怎么招？
曾：贴招工。
Jane：进来要考技术吗？
曾：不用考技术，进来就拿个坯就试，这个图。画得过关我们就谈价钱。就是这样面对面的交谈，我拿一个坯给你。你给我画好，你看这个型。能值多少块钱一件我就跟你谈。觉得他不行就不愿意做。比较直接，如果画一个不行，你就不用画了。等于我们就没有存在合同关系。
Jane：这样也比较好，不是亲戚朋友也没有面子问题。
曾：没有亲戚朋友。有亲戚朋友也不存在有面子问题。这个技术工，没有这个技术就赚不了这个钱。
Jane：所以即使是亲戚朋友也要以技术为主。
曾：看质量论价。比方说你技术好就高一点，技术不好就低一点，如果再画不好就做不了。他如果单纯像学徒工一样就赚不了钱。反正主要是技术。你没有技术就过不了关，质量就不行。质量是瓷器的生命。
Jane：你在樊家井跟国贸都有店面。
曾：对，我在樊家井和国贸都有店面。刚开始，我主要是以仿古。现在是从仿古转型成现代。以前都是做仿古瓷嘛，我们是看什么瓷器好销，就做什么瓷器。以前做仿古瓷在樊家井也还好。但我搬到国贸就做一点现代的。以仿古的限制去体现现代的陶瓷艺术。还是以仿古的技艺，和现代的观赏性的陶瓷。
Jane：所以你在樊家井还是最主做仿古，但是在国贸就做现代的？
曾：也不是，就是跟着市场转。也不一定。
Jane：那你两间店有没有明显的风格的区别？
曾：没有基本上差不多。差的就是就是客户流量，他们仿古也要，现代也要。几种渠道进货的人都需要这样的货。仿古的也可以买，搞现代的也可以买。既有现代收藏家也有仿古艺术。
Jane：就你来看现代与仿古，仿古与现代是一种可以相互结合的东西。
曾：可以可以。
Jane：在这种结合当中你有什么心得？
曾：反正不管是什么以质量为主。质量要好，画工啊，成型啊。各方面技术可以提升。什么瓷器都可以做下去。不管你这个瓷器各方面做得好，但是价钱不好，你成本花了这么多，利润薄一点，那你还是可以销得出去。我们现在做这个陶瓷也属于一种低迷的状态。以前的生意不是这样，现在很多又要便宜。以前不一样，以前价钱好一点。就比方三年前我们出一个货六百块钱一个，三年前我至少可以卖一千二。以前有这样的利润空间在里面。现在没有，现在卖六百块钱，就是挣一点手工钱，除去房租，店面开支，除去利润空间很小。现在很多就是这样，就是以产量大，来带动生产企业。

Jane：所以国贸那边的生意好过樊家井吗？
曾：好过樊家井，但它是以量为多。它就是走量。樊家井就是说它不跑量。他们就是一般他们出来杀猪的那样货。他们那种货利润肯定高。樊家井卖得少，像我们这样在樊家井的店，价钱比国贸好，但是说呢，卖得慢。比如说一个月有卖五千块钱，利润有三千块钱，你除去樊家井的开支也没剩多少。你像我们在国贸一个月卖三万，你就是利润薄一点你也可以有一万多的收入。除去开支也有几万块钱，就强过樊家井。

Jane：国贸那边是满好的。
曾：市场大，流量大。各种进货渠道的人，有外面开店的，有跑展销的，有跑外贸的，都到国贸来。百分之七十以上的人都到国贸去。

Jane：百分之七十在国贸，百分之三十在樊家井？
曾：还有百分之十在各个区域。

Jane：所以有百分之二十在樊家井。
曾：有百分之三十在樊家井。在这百分之三十里面还有百分之十在其它区域。他们是一个笼统的仿古区域。就是这个意思。他们到了樊家井也可能到其它地方。

Jane：筲箕坞。
曾：筲箕坞，高档粉彩。老厂啦。到这里的就不会到老厂。只有到国贸的才会去老厂。因为它是现代艺术陈设瓷。他们买了这个都是以展销的形式为主。反正主要的渠道就是跑展销的，发国外的订单啦，就是说发给，到国外开店的，中国开店的，各个城市。一般都是以国贸为集中地，以国贸为中心。然后就分散，从国贸出去。你像我们抢货的，在景德镇做陶瓷生意的都不会到陶瓷城去。那不可能的，他们陶瓷城的都是在我们国贸拿货过去放在那里卖的。我上个月也发了两万多块钱的货到外面。我也是拿别家的货。我有个姐姐也在外面搞销售，她在外地。我拿货也在国贸拿。

Jane：跟别人拿？
曾：不，跟自己拿。跟别人拿自己的货到外面销售，然后带上自己的一部分。提别人的货。提个两三米，这样多拿到外面去卖掉。也是一样的。主要是以这个形式。

Jane：那时候你怎么看新都这件事情？
曾：新都？是今年还是去年，一年一年不同。

Jane：三四年前那时候要迁新都你是怎么看的？
曾：没怎么看好。现在很多觉得还好，因为有天然气。主要是因为现在天然气和液化气价格的差别。差价，我们就看好新都。不然，我们都觉得新都不满意。

Jane：为什么？
曾：因为我朋友在那里买房子的很多。他们都觉得不是很理想。它主要是气便宜，然后一个窑费可以节约成本，节约八块钱。如果烧三百个的话，三八，二千四百块钱的利润在里面主要还是这个样子。三五百的产量是蛮大的，如果两百个，一干六百块钱。主要是以气价，来战胜瓷器的差价。一般别的地方的作坊都是以液化气。液化气贵嘛，它的天然气很便宜。它主要就是节约成本。比方说我在樊家井做，就比新都贵八块钱一个，或者六块钱一个。我们开作坊的到那里去要嘛在那里买了房子，要嘛就看重它的气便宜。另外它那里什么都方便。原料啦还是以樊家井为中心。

Jane：你的作坊现在大概有多少人？
曾：大概二十来个。
Jane：都是固定工人吗？
曾：固定工人十六个。
Jane：然后还有一些临时工。
曾：也不叫临时工。他们一个月也没做多少次。十二个是固定的，然后还有七八个一个个月上四五天班。他们都属于散工形式。他们在各家作坊属于散工形式。然后这十二个画工啊，他们天天在我家做事的。一个月就上二五天班，就是正常的工人。一般不正常的一个月就上四五天。我们打电话他们就来了，就是这样的工人。我们需要他们就跟我过来。然后再不行就在外面招，都可以招得到。我们青花有八个到九个，粉彩有三个四个。

Jane：那对你来讲，你什么时候在国贸做？
曾：去年。去年在樊家井就开始下架，今年基本上就没有生意。生意好淡好淡，处于一种很低迷的状态。当然个别的生意有好的是正常的。我们看整体的陶瓷市场就是是很低迷的。我们开作坊的都是有联系，大概百分之八十的人都没有生意。都是在很薄的利润经营的状态下。生意不是那么好，赚不到什么钱，在这里维持。

Jane：那国贸呢？
曾：国贸有百分之六十的生意好。百分之五六十。反正都还有利润。都还有生意做，虽然不如去年，但是还有生意做。有些以前都搞得蛮好的，现在都搞别的是。他们不做作坊了，搞陶瓷销售。比如自己开个店啦，或者到外面去开店。因为我们懂陶瓷不管青花粉彩颜色釉，反正就是什么都懂，我们就看陶瓷的质量的，我们都很懂。包括它的成本我们都算得到。我们捡货的时候，卖货的时候，就不容易让他们有水分。很多的水分在里面，我们的销售就很实在。

Jane：所以你有很多的朋友本来是做陶瓷生意的，后来都跑到外地去开店？
曾：对对对对。开店啦，全国各地，然后也有一些朋友去杀猪。各种的都有。所以作坊很难搞，有点压力。各方面的开支，你如果是做小的就没有什么意思。你一年打工也可以赚那么多钱，以我的资历出去打工可以赚到五千块钱一个月。就是帮别人做事，上班，四千一个月。如果你自己一个人搞小一点，一个月赚不到四千，除去店面房租，家里这些开销，生产不一样，一个月最少得一千多。你自己一个人赚不到多少钱，陶瓷生意这么低迷。你一个月赚这么少，惨淡经营还不如出去打工。有些技术好的也在外面打工。

Jane：要懂得适应市场的需要。
曾：就是跟着变吧。就是你看看很多大企业。这个不行就做那个，那个不行就试。你像手机一样的，这个产品不喜欢就换个产品。碰到外面有什么好卖的，就跟。或者自己开发新产品。

Jane：所以你大部分的画面都是自己设计的？
曾：对对对，百分之六十以上，百分之四十还是按照书。
Jane：还是以仿制为主？
曾：以仿制为主，然后自己再创新。不可能一模一样，比方说这个器型，这个画面啦。我们做这么多年脑海里有个什么画面都有。山水人物，什么都懂。都会画，然后就参照那种去改变。
Jane：有点创新。
曾：不可能一模一样，一模一样肯定不行。比方说这个图案这样设计不好看，我就设计这个。
如果没有这种水平的人就设计不了。完全按照书本就是不行。
Jane：因为他没有这个经验，他就设计不出这样的东西。
曾：对对。
Jane：所以樊家井有很多人在改变画面的吗？
曾：有有有。樊家井是百分之九十按照书来的。
Jane：但是还是有百分之十有创新的精神。
曾：他们创新就在于器型咯，就是做别人没有的东西肯定好卖。比方说这个画面没有看过，
就是根据这个商品去改变别的器型。不管是仿古还是现代都好卖，都有一两个月的生活空间。
拿到外面好卖。我是买过的，很简单，我经常在你这家抢货，间很多，碰到新器型我自己觉
得好看，拿到外面去卖，别人就会买。而且这个价格可以高十块二十块，他们都觉得无所谓。
这个我们做生意都知道。
Jane：就是从仿古当中去做创新。
曾：对。就是说做别人没有的东西。就是做独家货一样。做别人没有的东西肯定会价格高又
好卖。但是你一出，别人就会跟，跟了市场就没有了。现在市场低迷，就是要创新，跟着创
新以后生意就会好。要是你没有创新一直做这种货，一直做，你做以前一样的货，随便改变
一下，又是不同的价格。比如青花，你搞青花斗彩，青花釉里红又是不同价格。比如你加个
十块钱就有利润空间在里面了。或者是你五块钱的成本，又赚了五块钱一个。这个很简单，
本来就这样做。
Jane：所以你还有家人在抚州吗？
曾：现在我爸爸妈妈帮忙看店。
Jane：在樊家井还是在国贸？
曾：在国贸。国贸生意客流量大，樊家井现在都不怎么看了。就是请朋友看一下，明年准备
把它撤掉。因为毕竟不做什么生意。你一年店租六百块钱一个月，一年也还好七八千块钱。
如果一年连这七八千块钱的利润都赚不到还不如撤掉。
Jane：专门做国贸？
曾：哪种生意好就做那种。樊家井以后有市场，我们再赶过来这里。这个很简单，哪里生意
好就跑哪里。跟着市场转，跟着市场的需求去改变自己的陶瓷。
Jane：不过这次金融风暴让比较懂变通的人比较有机会。可以再起来这样子。
曾：金融风暴这种东西我觉得对陶瓷的冲击力很大。本来这个陶瓷就处于低迷。金融风暴一
下去，有钱的人，像广州倒闭的都是企业几百家，温州倒闭了几百家。你像那个外贸，他们手上
没有钱了就没钱购买陶瓷。然后我们陶瓷实际上也处于一个低迷。现在做陶瓷的可以维持得
下去，它一定有一个反弹的时机。做什么生意都是你不可能一直处于高峰。处于低峰的时候
要稳住，还有反弹的机会。我们现在做这行了，没有办法改掉，我也想去做别的生意，但是
都很难插进去。或者说我即想搞陶瓷又想搞个别的店。我以前也搞过。那你陶瓷生意就很
难经营下去。这个不是管理，是技术。像我把国贸的店交给爸爸妈妈，或者交给别人管。你
这二十多人怎么安排这个事，这个不是像上班，按正常一个人管六个人，或者五个人那是
很好管的，一个人要管二十个人相当吃力。像流水线一样。他们都是有个主导为中心一样。
二十多人上班的程序啊，他们哪里出错就知道。肯定会有错，像这个胚咯，有毛病他们就
找我，或者有毛病他们不找我，烧出来就没有钱赚。很简单的。要关注这个陶瓷的所有质量。
但是我到外面去做生意就不行了。这个陶瓷作坊肯定就会很多次品。次品就没利润。
Jane：那在国贸除了做低档瓷以外，也做中高档吗？
曾：也做。国贸什么瓷都有包罗万象。国贸像景德镇的窗口一样，什么陶瓷都有，只要你说
得出国贸就找得到。就现代瓷。
Jane：那仿古呢？
曾：仿古就到樊家井来，什么都可以找得到在樊家井。所有的现代瓷都在国贸，所有的仿古瓷，百分之九十以上你到樊家井都可以找得到你需要的仿古瓷。到国贸你可以找到你需要的现代瓷。
Jane：就是两个中心。
曾：对对，就是两个中心。就是要什么货，它那里全有。在国贸也可以找到仿古瓷，在楼上。但是他们那里贵，是开店的仿古。楼上一层大概有四五十间店面。他们都是以捡货为主。就是拿别人的货到那里去卖。他们的货源来自还是樊家井。我说国贸是一个景德镇的窗口就是这个意思。就是什么货都可以买得齐在国贸。
Jane：所以我之后应该花多一点时间在国贸，我已经花了五天的时间在樊家井了。
曾：你对这个陶瓷要了解，你自己要懂这个陶瓷。我想管理一个大厂。因为我搞企业管理有经验。我们是实践经验，你是理论的。
Jane：我自己也有开一间书店在新西兰。
曾：新西兰我去过。新西兰哪里？
Jane：但尼丁，南岛的。
曾：我不是在那里。我在奥克兰。在那个会展中心搞那个展销。02 年的时候。我在那里搞了一个投资展销会。搞得不成功。不行。我二十一岁的时候。正好是中新建交三十周年。
Jane：新西兰的购买力还不是很强。
曾：还可以，因为新西兰的华人还算比较多。
Jane：奥克兰的华人多。
曾：对。我们去也有做过调查的。那时候，我在网上查了很多资料，我那时候是查了将近半个月。什么资料都查，他们有多少华人，总区域，他们的房子高矮。我们都算了，算了要带多大的瓷器过去。我们都做了很多的市场调查，因为我们运气不佳是因为我们不能跟政府斗。
Jane：为什么？
曾：这个说起来要讲很长的时间。02 年的时候正好是碰到一个到国外搞展销的巅峰的时候。就是所有不管是有素质的还是没有素质的，一搬的，连卖菜的都到国外跑展销。他们认为可以赚钱，他们这个团队就不行。没有团队精神。我们搞展销的也有一个团队。我们素质都还可以家里都还有点钱，就可以。很简单，比方说我们一伙人过红灯他们就乱走，在国外影响相当的大。真的，刚好中新建交三十周年。我们一去，七天没有拿到货。刚好我们那时候出去的时候，我们都发货嘛，都是三个月前发出去。在上海那个码头发到新西兰，奥克兰码头，发过去以后，正好我们有两个月的时间从香港飞过去。刚好我们在景德镇有很多伙伴在国外出了事。他们是怎么出了事呢，因为他们本来素质就不是很高，有很多是乡下种田的。我们不是刻意说他们，不是我们自己排挤我们中国人。但是我们觉得他们做得不对。一下机场就狂呼大叫，这样肯定不行，在韩国就把他们打回来了。人被打回来了，肯定对那个展销会有不好的影响。那他们被打回来了，就影响我们出境。我们出境都是偷出去的，没有办法我们投资十多万，现在偷出去就不行了。我们到了国外，刚好有七天，一个星期没有拿到货。本来我们一上机，那个陶瓷是用木架钉的。那海关就查了。
Jane：木质产品他们肯定要熏过的。
曾：嗯，熏过的。然后就是查了打了下来。中国大使馆有些人就在那里静坐。刚好新西兰李洪志法轮功还在那里残余嘛。很多。我们到大使馆我们才知道，我们拿那个报纸就去了。但是我们的团队也有素质不低的人，他们就接着。接着就看。对面不就是台湾大使馆。那时候 02 年，对面就是台湾大使馆在奥克兰。那时候他们不走，又没有拿到货，他们就找大使馆。他们就静坐，台湾的华文报就乱写。造成了很大的影响。刚好中新建交三
十周年，中央一个领导过去访问。他知道。刚好他在惠灵顿。然后他就打电话压，要我们管
理我们这个素质。我们展销会刚开始，没有素质的一部分人，这个团队就闹得不好。我们
组会的有三个会头。有一个叫周升，有两个是我们抚州。周升也是我们抚州。也是像你一样
在那里也是一个留学生。但是他在那里工作了，拿最低保证金。他还是靠政府的救济金
一样的东西。我们景德镇的一个老板就被抓起来了，罚我们偷渡出去。他自己就不去。景德镇的政府机关就把她抓起来了。反正闹得也很凶。他们就打电话压市长。市
长就给我们一个个打电话，叫我们回来。要如期三十一号。我们三十一号的机票。我们二十七号，他规定我们二六号就要回来。一部分人二十五号就要回来。全部要把我们遣送回来。
一定要在这个期限，因为他们一个月的签证，刚好三十一号是最后一天。我在国外我当时
候就问很多的法律，当时的法律就是你有货在这里你就可以不回来。外国的法律跟中国很不一
样。当时他们就压市长，市长就派了两个，一个是市长秘书长，然后再说派一个人也到了新
西兰来压住我们，不能让我们乱闹事，影响不好。他们来了，我们陶瓷还是照样卖。一个月
嘛，大概到了二二号的时候，我们是二六号的机票，还有四天。二十二号大家还没有怎
么卖，成本的四分之一都没有卖到。但是二十三号，二十四号，二十五号。我卖了七万多一
点。我是投资十多万，卖了七万多一点。别人就差不多都卖了这个钱。有些人卖两三万的也
有，整体都不行。二六号就要坐飞机回家了。他们就一家家的做思想工作就是把这个货集
体卖给一个华人。就说卖几十万美金。那是政府骗我们的。骗我们说是卖了三十一万美金。
三十一万美金你算一下就是八块二。算八块，三八有二百四十万，然后我们有四家，就是
六万块钱一家。我卖了七万，就六七有十三万。就说是保本，我投资是有十二万。就赚一万
来块钱。有些人没有我货买得多。我的货在厂商来看算是中高档，算的上多一点，主流的。好一点的，尖端一点的。他们捡得比较差一点的成本还不到八万块钱。他如果拿这个合理的价
钱我们肯定都回去。然后回来他们根本没有履行这个，只拿了一百万，新币是二十五万。
当时的新币是四块一。就是一万。停在旅馆里，就两万多一点，把组会的几家公司没有的
去掉。大概有几家，我们分到大概有三万来块钱。我分得最少，三万三。多得分到三
万六，三万八。我们加了七万就十万。就亏了两万多。大概就亏了，一万几千块钱。

Jane：那你们的机票包了吗？
曾：我们买的是来回的机票。
Jane：那机票有亏掉吗？
曾：有，总共亏了五万多。我就发了十二万，那些零零碎碎都不算。然后我刚开始在那里也不
想回来。我还年轻，刚开始才二十四岁。出国的时候没有什么证明，就在银行里面抓了一
个中英文的资产证明。在银行里压了四万块钱，我们也想不回来，把那个去了，不走。我二
十五号没有回来，有一部分人回来了，就是有十一个人没有回来。就是我一个团队，我们总
共分三个大团队。我们是抚州人，抚州人就组成一个团队。还有一伙景德镇人。总共分了三
伙。还有都昌的。都昌的这伙人素质是最差。景德镇那伙人稍微好写。我们这伙基本上都是
在长期在外面做生意的，比他们肯定好一点。不是说我们素质很高，我们觉得比他们好。我们
就不回来，我们说我们三十一号我们一定走。我说我这张机票作废去，我自己重新买过一张
机票，单程机票回家。我跟大使馆的人都说了。

Jane：可以改机票的。
曾：本来就可以改机票。他们不行，他们一定要压住我们回来。就是一个秘书从跟另外一个
人，就压了二十几个人回家。就一班机回家，就二十五号。我们是到了二十八号才回来。我
们在那里主要是想一百二十万买下这一批货，在这里卖，然后我们自己办延期。主要是这
样的，但是没有成功，他们不允许。景德镇市长就不行，上面他们已经压。我们就压我们。我们想
了很久还是不回去，回到国内。不行，到了二十八号我们自己买机票回来。机票过期，我就延
期，他们有一个开金马酒店的，他是老华侨，他就叫他的儿子拉我们十一个人到机场机票延
签。刚好签到二十八号。然后就再也没有办法，二十八号就走了。

Jane：那你除了去新西兰，你还有到其它地方去展销吗？
曾：有很多地方。我做了四年的生意，搞陶瓷销售，以展销为主。开店也有开店。因为我们
毕竟开店要资金雄厚。我们刚开始来搞都是白手起家，资金肯定不雄厚。有个人开店在上海
一百多，我们肯定没有资金。一个企业就是资金困住你了。就是资金，没有那么雄厚的底。
你一个月挣五千略，然后你一两个月三个月不做生意，还是做一点，然后你以后生意会好。
你就受不了。你没有那个经济实力去让它开下去。你随便开一开肯定不行，你要选点选得好。
这个也不行。做陶瓷生意就比做品牌，要自己去创造自己的品牌。我在景德镇自己就是一个
品牌一样。我们到外地去，就要自己打响一个品牌。要别人相信你的店。我在景德镇，我自己
就是一个品牌，在国贸一条街。我的生意就是一般般的，不是说中高档就是一般般。我
之前在樊家井以前就算是尖端的。到外面做了几年的生意现在又可以捡起来，重新做。因为
生意闹不起来，还是重归老本行。还是做这个陶瓷。

Jane：你在外面跑了四年那你有赚到钱吗？
曾：有。也亏也有赚。

Jane：本还是蛮大的。十二万，你这个是跟朋友借的，还是？
曾，都是自己的。那时候二十岁做的。那时候还年轻，不懂事，乱玩乱去。到外面也花了一
点钱。自己也不懂得珍惜。年轻的时候觉得挣钱很容易。现在到了我这个年纪，就是从一个
不成熟到成熟的转移。人生就是这样，也没什么可谈的。人生转型，我们家境也算是一般。
你说能在外面乱玩，玩了几十万是吧。玩了二十多万。不行，现在觉得钱很难赚。

Jane：那你还去过什么地方？
曾：中国百分之六十的城市。大中城市去过。从四川去到甘肃，从甘肃转到东北。就是从南
京以北全部到过。从广东，就是没有去云南那一边。

Jane：福建去了吗？
曾：去了。就是一个城市一个城市压过去。很简单。比如我们到山东，第一趟到济南去，到
济南就一步一步下去到青岛，到秦皇岛啊，一步一步下去。从哈尔滨一步一步下去，最后走到
黑湖。走到边境一步一步走。我们在网上做了一个调查才过去。我们景德镇有一个组会
的中心，这些人到外地去展销区域的一个中心，他们就在淮扬。还有就是我们几个以我为头，
我们组队出去考察，调查。

Jane：所以就是先去调查，然后再看这个市场适合不适合，对不对？
曾：嗯。然后就是我们自己人出去，外招。

Jane：都是自己的人，还是有其他人？
曾：都是我们比较熟悉的人。

Jane：所以跟你跑展销的都是抚州人，是不是？
曾：也不一定。什么地方的人都有。全国各地，只有他们对陶瓷有点了解，
愿意做，都可以。一样的，那没什么要求。只要他们买了这个他们都可以跑。你想去你也可
以去。就是买摊位。自己在这里买陶瓷到那边去销售。

Jane：一般都是一个展厅。你会先去看展厅的分布吗？
曾：他们都会说，然后有图纸，然后我们就调查那个点在哪里。主要要看那个地方人口的
集中程度，是在闹市还是在郊区。现在那个地方都卖过，不可能有首届。以前是有首届，
我们 02 年 01 年有首届，现在没有首届。他们都有经验。还可以的地方都可以去。比较简单
经济实力要好的啦。就是说他们那里文化修养还好的啦。像西安啦，他们的文化底蕴还蛮好的。
洛阳啊，开封啦，这些都好。像呼和浩特，包头咯，还有到东北那边，黑龙江，大连这个地方
都卖得相当好。大城市，文化底蕴好的。上海行是行，但上海人太精明了。所以比较难
做。东北人稍微。
Jane: 大气一点。
曾: 好做一点。上海人不好做, 而是他们就生意来讲, 比较精明一点。赚有钱的人不好赚。赚没钱的人也没钱。
Jane: 你跑这些展销的都很老资格了。
曾: 我现在都不出去了。因为我们去的地方多, 到那个地方都可以去。国内国外我们到那个地方都可以。
Jane: 都有亲戚朋友在那里吗?
曾: 没有。我对这方面的人, 我想去我就可以去。我就可以联系到这条路。比方我想去那个地方一下, 我打个电话。比方说我想去国外, 他们就会跟我们联系。
Jane: 那一般来讲有国外牵头的人是不是?
曾: 有有有, 也是以展销会的形式。或者自己发货柜过去, 自己到那里踩点。比如说自己去马来西亚, 现在签证很容易。你就可以发一个货柜, 我们三个人装一个集装箱的货, 自己过去踩点。比如到了马六甲, 我们自己租一个场地, 在那里像开店的形式展销。自己租场地,各方面自己清单。现在不需要那个, 也有这样的人
Jane: 现在跑展销的人还是很多。
曾: 多。还是多。但是瓷器市场还是很低迷。不像以前, 以前是景德镇全民总动员。
Jane: 听说樊家井今年有少了百分之五十的人?
曾: 开作坊的吧?
Jane: 对。
曾: 我朋友认识的就有六七家没有做了。六七家, 七八家他们以前的产量都还可以。都是我比较熟的, 还有我比较不熟的有几十家, 我不知道。一家都有七八个人, 十多个人, 走了一家就少很多人。我们景德镇就做好器啊, 杂件啊, 铜器, 镶丝珐琅就是这些, 然后还是形成了仿古市场。然后就是外地的一些产品。景德镇的瓷器包括了中国所有的瓷器。在景德镇都可以找的到, 它是一个中国陶瓷集散地。
Jane: 像龙泉窑啊, 紫砂啊。
曾: 什么都有, 都可以找得到。几个产瓷大区, 淮山的啦, 广东潮州啦, 然后湖南的醴陵, 河北的。所有的陶瓷都是可以拿到景德镇来销售的, 都可以卖得掉, 不管是仿古还是艺术品。市场是特别的地方大。我到很多地方看过这个陶瓷在那里, 都没有景德镇齐。景德镇齐, 杂, 多。只有是你想买的, 景德镇都找得到。不管是什么地方的陶瓷都可以找得到。
Jane: 景德镇的区域经济很复杂。
曾: 相当复杂。
Jane: 所以为什么会跑到景德镇来, 首先景德镇的工序很复杂。它这个陶瓷过手七十二。从古时候是很复杂, 现在一条龙可以做。但是当中所需要的次序, 工序还是很多。工种多, 品种又多。
曾: 对。品种特别多, 你要了解需要很长的时间。
Jane: 我不需要了解到所有的品种, 但是我对于这个经济模式, 从采访当中我去了解。从各种个人的片段去拼凑一个图, 了解这当中有什么数据是比较重要的, 体现景德镇陶瓷产业的特色。
曾: 我懂了, 就是写一下景德镇的经济模式。
Jane: 因为单独的小企业是生存不了的, 所以为什么要研究集群。
曾: 对。单独小企业生产不了。
Jane: 你在国内哪里?
曾: 在景德镇三十三号。市政府不行, 他们如果行的话, 他们没有偏重陶瓷, 他们偏重房地产这方面。以赚钱为主。
**Jane:** 其实这是个很可惜的现象。因为只有你这个产业搞得好，你这个城市经济才会好。
**曾：** 他们搞得市民的手上经济没搞好。
**Jane:** 其实他们宏观调控的痕迹蛮明显的。就是说政府走的路和市场走的路是两条路。
**曾：** 对。
**Jane:** 就像计划经济他先把一套方案放下来。全部建起来之后他才问你意见。
**曾：** 嗯。
**Jane:** 这个是区域经济发展的弊端。因为政府主要是起一个扶持，先导的作用。像广州的市政府就走得相当好。
**曾：** 他们潮州瓷就搞得相当好。
**Jane:** 因为市政府有先见的时候，他就会请专门的人做分析，做宏观调控。他宏观调控就是说不是他想怎么搞就怎么搞。就是说国外的形势是怎么样子，国际的形势是怎么样子，市场的形势是怎么样子。广州那边的经济搞起来就是他市政府行。
**曾：** 政府行。就是市政府是个带头人。像国外展销，如果市政府他们牵头，由市政府出面就不会搞得一塌糊涂。现在市场全部烂掉了。我们景德镇的品牌没有，形成不了。他们现在都不相信，说我们景德镇是垃圾。如果他们搞好的话，我们景德镇五千年的文化。就说也说不清，就是把瓷器做烂了。别人人都不相信景德镇的陶瓷。是好东西。他们就应该把关，设监测。不能拣破的拣烂的，质量差的。低廉的不要紧，但是你瓷器不要有次品。如果市政府有牵头，以展销形式出去，景德镇就是一个很好的品牌。景德镇本来就是一个品牌。你把景德镇的牌子砸掉了，你就没办法发展。
**Jane:** 其实跟跑展销的很有关系。因为景德镇的品牌在外面就是以跑展销的形式体现得比较多。
**曾：** 对对对。我觉得一个市政府没有重点抓这一点。我觉得如果有抓这一点的话，生意还可以做得好，做得大。
**Jane:** 就是一个规范性的问题。
**曾：** 我们企业所面临的问题就是做不强做不大。我们想做强做大做不了。很多问题，内因外因。
**Jane:** 现在要做大做强就现在世界的趋势来讲，不容易，除非你已经是大企业了。大企业要解体比较难，要形成一个大企业也比较难。
**曾：** 对，就是中型企业在景德镇也比较大。这个大了，根本做不强。就像我们景德镇瓷器规范化，做厂房形式，根本做不了。因为技术工咯，不可能所有的技术工都可以到你这里来。他们小作坊关起来，都是高薪聘请，再高薪。你做好瓷器还有一个销路也是一个关键。你投资那么多，拿不回来，你资金不流通，企业就走。没有那么多的钱去压这个投资。那里有多少，我们有多少经济实力就压多少。真正的还是以一个小企业的形式。还是家庭作坊式的模式。以后搞大搞不大是看以后。
**Jane:** 如果要搞大企业的话，还是瓷厂的话，之前也都是国营的。
**曾：** 之前都是国营的。就是景德镇自己做。私人做，也有。有几个大企业做下去。有一个台湾的老板做他叫法蓝瓷。他的瓷器卖得贵。其实他的成本小，利润很高。自己创了一个法蓝瓷的品牌。我们景德镇很多品牌都烂掉了。现在就是一些名家的，他可以形成品牌。做不大，要不是名家很难。我自己也是搞作坊形式的，你说赚钱赚得一点点，自己什么都要管。从生产什么都要管。所以就很累很辛苦。
**Jane:** 所以如果要搞大的话，就要搞品牌，你就要去经营一个品牌。那你现在有往这个方向想吗？
**曾：** 有往这个方向想。我们现在做陶瓷都不做次品的。以前不会。反正我做人跟开店一样。我是好的就是好的。是坏的就是坏的。以前很多厂家都是卖方好，不管好的坏的就是这个价。
但是我们是什么就是什么。方正做生意很难。现在正品的很少,大概可以就可以了。如果要挑毛病什么瓷器都可以挑毛病。一般正品就是没有大毛病，就是一般的小毛病。就可以卖。大毛病修补好了也充正品卖。我们就不会那样做。那样做就不行。你骗人家一次，骗人家两次，你把自己的品牌搞烂掉。你在景德镇做，就做个自己一样，就是我今天这个东西别人觉得好卖还好价，别人赚得了钱就到你店里面来买。就是很简单的一个例子。我们现在只能做到这个。我们就想说拿到外地去，说是景德镇的，名气很好，就是这种品牌。至少是做一个中国区域性的这样一个品牌。做好在向世界冲上去。

Jane: 所以你的眼光还是比较远的。
曾: 不是。是我们年轻人看得比较多。也是经历得比较多。只是文化水平不高。不能达到那个层次。

Jane: 但是你也可以请大学生。
曾: 没用，请大学生。他们没有一点技术没用。

Jane: 但是他们可以帮忙管理。
曾: 没用。管理，我们十多人在做事，问这个出了毛病，你大学生肯定不会补。你修补不了了就不行了。

Jane: 所以这样的话就需要你本身去进修。
曾: 就是要请我这一类的管理人员。懂技术的管理人员。有我这样的技术他就不会帮我打工。自己就会去开店。很简单的。就是请不到有这种人，景德镇就有这样的缺陷。我有这个技术我干嘛给你拿这个三四千块钱，两三千块钱一个月。我一个月自己挣四五千。别人都有这样的心理。 所以大家都小作坊，没有办法做起来。做不强做不大嘛，就是这个样子。很难。

Jane: 其实说不定这次金融风暴之后反而给机会可以做大。因为有很多人又再一次下岗。
曾: 对。现在招人比以前好招。去年上半年我贴个招工，没有人。都是很忙，家家户户生意都好。现在贴个招工天天都有人打电话。就是很显明。因为倒了好多企业。人就有一点失散。这个厂的价格好些，那个厂的价格低些，我就属于中档。反正我家乡的包你一个月有事做。总价格是好，那个价位也差不多。反正我们现在都做，这个是中等。就是跟着我，我叫他们画什么，不会，我就教他们。所以这个技术人员就很难找。我自己想脱身，我想搞瓷器开发，自己搞新产品。我可以请一个比我差一点的都可以，我自己专门搞设计啦，各方面。

Jane: 有考虑过找陶瓷学院的学生吗？
曾: 没有。因为我看过陶瓷学院的学生。他们的技术在我眼里很垃圾。真的，除非学得特别好的。 我是没有看到。反正陶瓷学院以前也有到我们这里打工的。我上看不上他们。他们都没有实际的经历。他们的工笔画，他们的技术都是纸上谈兵。没有用，他们实践工笔都不行，像画龙，我们叫他们画九龙。他们根本画不了。他们只会画画线，浑水。我请了三个陶瓷学院的学生。他们都被我炒鱿鱼，没有用，画了一两天。最开始，景德镇陶瓷学院以国画的东西去体现陶瓷的多。国画他们又画得不好。第一眼看上去还好，出了一四根放在店里卖，最后都压在那里。这个就没用，没有市场。我们都是以细，以工笔的形式体现仿古和现代。我的陶瓷是以工笔形式。就是线条比较多，比较细。工笔形式然后带一点仿古的点工这样的形式去体现。现在那种大写意，学院派的陶瓷学院的学生根本很难找。

Jane: 所以他们只能去评大师，学院派的。
曾: 现在评大师是一个多么长的过程。那肯定不是说一评就评得了。根本不可能。他们的工笔跟我们的有很大的区别。他们的功底都是很浅，很皮毛的。我们家里的学徒学了三个月就
有他们的功底。在我们家学徒学三个月就比他们在陶瓷学院学三年强。他们根本没有实践。在我们家学三个月的东西都比他们多。他们根本不知道瓷器的东西哪个地方出毛病。出了毛病就是我去处理。陶瓷不可能不出毛病，出毛病就要改进，哪里的功底不到位。他们根本不可能知道。青花里面那个料，釉，料薄厚。他们根本都掌握不了。要我们去帮他们处理。

Jane：所以你自己学画陶瓷画了多久？
曾：我都学画了十多年了。十一年吧。我来景德镇多少年，画了多少年。

Jane：加了四年你跑展销。
曾：我跑展销也在画。就是我一回家我还是要去画。毕竟是我画的东西要好卖很多。而且价格很高。比我们家里生产的人高多了。别人卖一百二，我就可以卖一百六。就是这样子，一样的货。就是自己画的。他们以画工好就多赚钱。

Jane：你现在还画吗？
曾：我现在没有空。因为产量大了，现在就没有那么多机会。我现在画得比较少。我画的东西，现在我的店里都没有。一个都没有，早就卖光了。现在我爸打电话说有人订了，拿订金，我才做。一般要交订金，我才画。画是画，画得少。以后是以企业家的形式，才能做得强。但是你又不能出那么多的量。所以就是陷在这个困境。企业做不大做不强就是在这里。

Jane：现在有两条路，就是说一般，一般大企业的话你要量大，规模化，标准化。你要做品种很多的话你就很难去把握那个质量。
曾：对，那是肯定。要是有一批的技术人员在那里还可以。如果有一些技术人员，比我差一点点都可以，管整个质量问题就还过得去。比方说，我手上有六个我一样的，我就可以管他们，他们就可以管六个，六六三十六，就一个企业化的规范管理嘛。达到这种水平吧。那就管得了。

Jane：那你自己搞管理培训你自己也是需要花时间下去的。
曾：我觉得不需要。

Jane：那你六个人管六个人，你也要培训这六个人。
曾：不需要啊。

Jane：为什么？
曾：因为我觉得我可以管理得过来。我只是附带管理，总体的三十六个人我还是要管。

Jane：那如果你有那么大的企业，你资金有那么雄厚，你就可以请一大群人，就可以请我这种水平的人，你就做高啊。你如果有那么大的厂房，你就出得起高薪，比方说五千不行，我给你六十，六十不行我给你七十，你就可以请得到这些人，你就是还有利润空间在里面。搞个大企业，我就是这样想的，很简单。培训是肯定要培训就像我给他们上课一样。在国内地方管理，去上别人的课根本没用。以我为中心的一个管理模式。因为这个厂房的东西，我什么都了解。我跟他们上课是很正常的，你请别人来，请什么大师一个一个按他们品牌管理，我觉得还太不适合。毕竟是抓质量为主。其实那个没有什么大必要。企业管理，如果到了一定的规模以后我可以跟他们上课培训，一样。我就可以把我所知道的全部教会他们。如果只是一百人以下我觉得我都有能力应付。这是我给自己的评价。我觉得我自己可以胜任得了。

Jane：一百个人你还可以管理得了？
曾：可以管理得了。

Jane：你自己还是蛮有信心的。
曾：有信心。因为我管过。我多的时候四十多个人。没有问题。流程都很好。但是一个人管的话他们就有空闲，他们就有工差，那是我们以前管理上的缺陷，现在就不会了。我有这方面的经验。如果分工没分好就会浪费工。现在就不会。一个人做这样一个人做那样，像流水线一样就不会误工。以前就没有想到这一点。我们就是经历过了就知道了。

Jane：像做流水线这样的
曾：就不会误。误一个人的话就误两个人，两个人误，误三个人，一天浪费就浪费两份工。两个人的工钱，你这个企业就浪费两个人的工钱。比方说三十个人，你浪费两个人的工钱，企业就不好。现在一百人都我管得了。那很简单。不比以前，以前没有经验。我也是当学徒出来就做这份工。经验这么多年，肯定经验很多，就知道。

对象 7：男
年龄：四十多岁
职业：窑老板

Jane：你们现在搭窑比前几年多了还是少了？
男：少了，生意不好就少了。差不了太多。

Jane：客户群体没有变化还是常常会有变化？
男：那肯定有一点变化了，客户群体。

Jane：就是有些人走了，有些人新来。
男：嗯，那个是有的。有的做不下去就不做了，生意是这个样子的。有倒闭的有开张的。

Jane：那你们烧窑跟以前相比的话，液态气的价钱有上升了还是下降了？
男：这个也是根据国际原油市场价格走，也是根据这个市场涨。

Jane：听说现在烧窑比以前贵很多了。
男：现在比以前是要贵一点。这几天起价跌了一点。

Jane：今年在樊家井大家都说不景气的情况下，对客户来讲有影响吗？
男：对我来讲我是没有影响。你可能要问大窑，因为我的窑比较小。再者我的窑都是烧的仿古瓷。仿古瓷，比较小，我的客户也不多，也就几十户。基本上一个月二十五六窑，还可以。对我来说也不算是少。也要休息几天，也要休息。大窑可能影响比较大一点。大窑一般体积比较大。

Jane：你的窑有几立方？
男：我的窑比较小，有三个多立方。大窑就比较多影响。

Jane：樊家井这里的窑有多少户？
男：这个我具体不清楚。二三十户有吧。

Jane：以前是不是比较多？
男：以前也差不多。樊家井没搬几处窑。

Jane：都搬到新都吗？
男：搬到新都的也有。卖掉的也有。卖给别人去的也有。

Jane：那你烧的是梭式窑？
男：嗯。

7.4.2.3.15 Interview 20: Janet, Sculpture Factory, 20081025

Interview Transcription 20 20081025

Location: Saturday Ceramic Market in the Sculpture Factory

Interviewee: Janet，An American Janet (Whole Seller)
Age: 40 -50 years old
Jane: There are many porcelain industries around the world, we just wondering why you come to Jingdezhen?
Janet: I come here to learn about porcelain or making porcelain. And I am an artist and business person from United States, learning about how to make things and make new things with the artists here to sell back in the United States.
Jane: So you pick up stuff from here.
Janet: Develop new things. Pick up and make with the designers here, the artist. We need new looks.
Jane: new style. How do you think the traditional porcelain here?
Janet: I like the traditional porcelain, I like the techniques, but I like it done in a new way. I like both, the new and the old techniques.
Jane: How is your business back in United States?
Janet: It is tough. Goes around the world, the economy is a challenge, but there is always room for new ideas.
Jane: So you still have the confidence?
Janet: Yes, absolutely.
Jane: Do you come here every Saturday?
Janet: It is my first time here on Saturday.
Ting: You just began to do this business?
Janet: Yes, It is interesting to say how global porcelain is, and I am here to learn.
Jane: Nowadays, Jingdezhen is very sensitive to what is happening around the world. The Economy recession influenced the industry here a lot, especially the traditional porcelain industry.
Janet: Yap. It tells us, for instance, the United States, it like traditional but want it looks more contemporary. Sometimes the old techniques need to change. The design of them, not the techniques, need to change. And they are changing much.
Jane: When you talk about the design, are you talking about the style, the painting and the patterns?
Janet: Yes. For instance, could be new shape. There are pretty colours, with fasteners in each side, not necessary straight. We use a lot of monocle, or interesting crackle, this could be a stew. Compare to the nice stews there. It is a nice shape. This is a traditional, but you see all this shapes, it could be painted with emissary, it is kind of a west Europe, and China used to do with all patterns. This is with different textures. It is a screen with a texture like a shark skin with different colours. Again, it is an old way but it is new with lots of colours. This is actually an excel from Vietnam, it made there. Cobbing traditional, interesting technique, more cobbing, see that little stew, could be with little animal print, like a tiger. There are some funs with painting. It is new with new cobbing. Looking the cobbing at the top, just new touch to that, same as this.
Jane: Is it your own design?
Janet: Impressions, not this is more idea board. Or interesting cobbing on it. Very simple cobbing.
Jane: You said you make porcelain yourself, and you just gather all the artists.
Janet: I would work with artist, and then get the ideas and make it.
Jane: So you give them the space to create.
Janet: No, I bargain with them and they might come with me to the factory, very interesting finishes, very pretty. Big, this is very traditional, but you may change the colours.
Jane: The glaze?
Janet: Yes, you may change the glaze. That is what we do, the new page front with old techniques.
Jane: So you work with new artist all the time to gather new ideas?
Janet: Yes, because my things sold in the house to atone the core, to look more fashion, and fashion changes. This time, black and white could be the story, and next time could be animal printed.
Jane: How do you like Jingdezhen so far?
Janet: I do, for sure. I am very zen, very clear, with lots of pattern.
Jane: It is good you know what you want in Jingdezhen or you will get lost.
Janet: Absolutely.

7.4.2.3.16 Interview 23: N/A, Guomao, 20081025

Interview Transcription 23 20081025
Interviewee: American teachers from Shanghai
Jane: Where are you from?
Teacher: We are from Shanghai. We are both from America, from the States.
Ting: So you are teachers from Shanghai?
Teacher: Yes. This is our first time in Jingdezhen.
Jane: So what are you looking for here?
Teacher: A piece of pottery. Things like this beautiful, ceramic.
Ting: Do you make porcelain?
Teacher: No, that is why we like to look. Something different, something unusual, we are unable to find in a store in Shanghai or United States.
Jane: So are you looking for something more contemporary?
Teachers: More contemporary more straight.
Jane: Jingdezhen also has a lot of traditional ones. Do you like the design or the patterns of the traditional ones?
Teacher: I don’t like the traditional that much. I like more contemporary.
Jane: How about half traditional and half contemporary?
Teacher: Depends on what it looks like.
Ting: You go around here, or you stay here.
Teachers: we have been to a couple of places here. Maybe our third stop. We met under our mate Convady, and she so keen for contemporary stuff. We likes more contemporary. Do you know where can we find more contemporary stuff?
Ting: In the sculpture factory. Have you been there?
Teachers: no.
Ting: There are many foreigners, many artist and many students doing kind of
morning market. You missed it, because it is this morning. It finished at 11 this morning.

Teachers: Our plant from Shanghai was late. We are supposed to be here at 8:30. That is important, but we are not able to go.
Jane: So when will you leave?
Teachers: tonight. Because morning we have to go back to work.
Ting: If you just go around the centre of the city, you could not really find something contemporary.
Jane: What kind of price are you looking for?
Teachers: We don’t know we just looking.

7.4.2.3.17 Interview 24: Xing Jun, On the train, 20081027

Interview Transcription 24 20081027

对象: 星军
祖籍: 抚州
年龄: 三十四
婚姻状况: 已婚, 有小孩
教育: 初中毕业

Jane: 你在景德镇做过陶艺吗?
星军: 做是没有做过, 我都是来贩卖的。
Jane: 你就是初中毕业就在贩卖瓷器?
星军: 跟人家学过一段时间。刚开始也不会做的。就有人带了半年, 后来就开始做。
Jane: 就是有人带你做。
星军: 刚入门的时候, 什么也不懂。
Jane: 所以你就花了半年去了解瓷器?
星军: 去了解怎样挑选瓷器。刚开始来, 肯定对瓷器一点也不懂。下手也不知道从哪里下手。
Jane: 那你刚开始去景德镇是不是有亲戚朋友在那里?
星军: 那没有。都是跟我一起, 我的老师也是我的老乡, 也是抚州的, 一起来的。
Jane: 所以就是你当初出来的时候就是跟你的老乡, 老师一起出来的?
星军: 对对。我们抚州有一半的人在景德镇。做瓷器的也有一半是我们那里的。
Jane: 像樊家井有百分之六七十都是抚州人。
星军: 像我有很多朋友都在那里开店。亲戚也有在那里的。
Jane: 当时候为什么出来跑。
星军: 我们在农村, 哪个人都要做一门手艺。像我呢。倒是我们在那搞建筑的多, 像我呢,我可能不适合搞建筑。以前也干过一两个月, 我不习惯。后来还是下来。
Jane: 那你在景德镇待了多久?
星军: 我经常来的。我现在开了店。我以前全国各地, 除了新疆, 西藏没到过, 其它基本上都已经到过了。
Jane: 都是跑展销吗?
星军: 展销也跑, 以前都是做零卖的。以前我刚开始做仿古瓷到后来做民用瓷, 就是日用瓷。就是餐具, 碗什么的。
Jane: 你怎么转变从仿古到民用？
星军: 刚开始做仿古，那时候是九五年，九六年那时候，那时候做仿古相对赚钱一点。到后来仿古跑的人太多了。时间长了，生意也没有那么好做了。所以我就转了一个方向。

Jane: 那你多久来一次景德镇？
星军: 像我以前的话就半个月来一趟，久的话也就一两个月。

Jane: 那你现在是固定在泉州了吗？
星军: 也不固定。像这个不能固定。在这里有生意做，这个地方才待得下去。我们人很多的马上就联系下一个地方。像我们做这个全国各地也有。

Jane: 你们就是看说那个市场已经饱和了，景德镇的陶瓷已经饱和了，你们就移动到下一个城市？如果做的人多了，你们就换一个城市？
星军: 那也不是，刚开始的时候也会有点挑战，但是后来人越来越多了，也要换一个陌生的地方。

Jane: 所以你大江南北都跑过了？
星军: 除了新疆西藏都跑过了。我刚出道那几年就跑过了。一年 360 天可能就有两百天在火车上。那个时候很快的，一个星期来回。一般做我们这个都是全国走。现在全国各地景德镇的瓷器都看得到。而且很多。有些地方都跟景德镇一样的，我们火车拖过去，都很多很多。基本上很多东西都到家里买，在外面都买得到。

Jane: 就是说景德镇的陶瓷在哪里都有。
星军: 哪里都有。

Jane: 那你前几年跑展销是几年到几年跑的？
星军: 展销的话我也跑了很多地方。数都数不过来。

Jane: 多是国内还是国外？
星军: 国外我还没有去过。

Jane: 所以你前几年有跑过展销。这几年都是零售是不是？
星军: 展销一样，展销刚开始可以到后来都赚不到什么钱。所以我不跑展销。很少跑展销。

Jane: 你们在泉州是有固定的店面吗？
星军: 有。

Jane: 给别人租的？
星军: 都是租的。

Jane: 那泉州那边生意好吗？
星军: 也不好。今年生意不好做。也不光是泉州哪里都一样。像福州啦，温州啦这年头都不好做。

Jane: 那你对这个城市了解怎样？
星军: 那也看哪一方面。

Jane: 就是陶瓷，你觉得他们的陶瓷怎么样？
星军: 景德镇的陶瓷整体好。一般拿到别的地方说是景德镇的，有的还不是景德镇的。大家
都看重景德镇这个牌。它做的陶瓷肯定是一流的。
Jane：所以这个算是名牌。
星军：嗯。是国际名牌。
Jane：那这几年你们有没有觉得说这个名牌越来越不好用了呢？
星军：其实我们买的时候也有高中低几个档次。档次高的不管到什么时候都是好的。档次高价钱接受不了。档次低，价钱容易接受，但是满意度没有这么好。
Jane：有些人说跑展销把景德镇的牌子给弄烂了。你同意这样的看法？
星军：有一点这样的看法。
Jane：那为什么会把景德镇这个牌子弄烂呢？
星军：展销也不光是景德镇的瓷跑展销，还有潮州瓷。还有很多外地的瓷，还有江苏的，也不光是景德镇的，哪里便宜进过来打景德镇的牌子。不是全部是景德镇的，全部是景德镇的赚不到那么多钱。我们也卖潮州瓷，因为它便宜。像我们看得出来，像一般他们外行看不出来。看不出来质量上有什么区别。
Jane：那你一般在景德镇哪里拿货？
星军：我们都很熟了，要看哪一种货在哪里拿。你看景德镇的窑都不一样，每一家的风格都不一样。
Jane：你是直接在作坊里面拿？
星军：我们以前都是直接在作坊里面拿。像我们店里，有一些作坊在外面都不卖的，都直接到我们店里。不能卖的。你一个作坊，我们直接跟你拿货，如果我们在别的地方看到一样的东西，你的帐也不好结。就是独经销了。
Jane：就是这家作坊的东西全部你们包了？
星军：对。
Jane：就是他们一年生产多少，你们就包多少？
星军：对。就是他们做出来的东西放到我们店里，卖的东西都记好了，买了什么东西，一个月结一次。
Jane：那他们一般厂房在什么地方？
星军：厂房？都是小作坊。在樊家井都是小作坊，密密麻麻。
Jane：你们都是跟樊家井拿的吗？
星军：樊家井也有，大市场也有。
Jane：国贸？
星军：嗯。这个都说不清楚。别人跟我们下了什么订单我们就到哪里拿什么货。
Jane：那你们日用瓷在哪里拿？
星军：日用瓷我们都是在大厂里面拿。以前在国营厂。
Jane：就是像为民，光明瓷厂？
星军：嗯，都有。
Jane：所以你们日用瓷以前都在大厂拿，现在也在小作坊拿？
星军：小作坊是拿仿古瓷。
Jane：像你们都是承包的吗？
星军：我们不用自己来拿，我们全国各地打个电话，他们就发货过去，不用人来。
Jane：那你这次来是？
星军：朋友有事，我来这里玩。我经常上来，来玩。拿东西不用自己来。把订单传真传过来，他们就会发过来。
Jane：那你不用过来挑货？
星军：什么挑货，那个规格什么都已经清楚的。
Jane: 就是多少钱的,几百件的都已经很清楚了?
星军: 嗯。他们画好了,都是行家,就知道。但是到了一个新地方就要来一下。一般都是好
多家的货。
Jane: 所以要拼车?
星军: 一般都用集装箱,用大盒。
Jane: 比方说你要从泉州移到厦门,你会在泉州把所有的货处理掉是不是?
星军: 有些要处理掉,有些要带走的就带走。处理不完的就要带走。但是一般都剩下不了多
少。一般我们用比例就百分之十,百分之十五这样盈利。有时候我们不盈利或少盈利就可以
多做很多生意。
Jane: 就像你刚才讲的,你刚到厦门的话就要跑一趟景德镇把货弄齐了,因为市场的要求不
一样,对不对?
星军: 那个当然了,也不要到处跑。我在这里也会把这个联系好。
Jane: 所以你到一个新的地方也不用跑一趟景德镇?
星军: 也要来看一下。有没有新的产品。过时的也没用。
Jane: 像景德镇它有陈设艺术瓷,有仿古,有日用,有名人名作,那么这些你们都会拿吗?
星军: 我刚刚不是说过了吗? 顾客需要什么订单,我们就下什么订单。因为市场上什么都有,
也许我们没有的别人有。客户经常到我们这里拿的就跟我们说可不可以进这个? 我们就跟他们
进过来。你肯定进不齐的,不可能进得齐的。
Jane: 那按百分比的话,你们日用瓷的销售占营业额的百分之几?
星军: 我们大多数卖的都是日用瓷。百分之七八十都是日用瓷。
Jane: 那仿古呢? 占到百分之几?
星军: 百分之二十。仿古现在淡一点。民用瓷便宜市场大一些。
Jane: 利润高点?
星军: 嗯。仿古的利润高一点,也比较难销一点。
Jane: 所以你仿古都是在樊家井的小作坊拿的?
星军: 小作坊也有,大作坊也有。青花,粉彩什么都有,还有珐琅彩。我们刚开始也说不出来,
后来了解得透一点,就说得出来。刚开始卖仿古的时候很苦。刚开始九五九六年的时候
什么都不懂。我刚开始的时候还亏本。有半年没有赚钱。
Jane: 这个正常吗?
星军: 刚开始都是这样的。那时候我们的进价也挺高的。出手不算高就没有钱赚。
Jane: 那时候对市场行情不怎么了解。
星军: 嗯。时间长了,我们价钱就压得差不多,比以前卖得好一点,我们就能点钱赚。现在
不好做。现在人太多了。
Jane: 就是市场有点饱和了,跑国外的也多。
星军: 很多很多。但也赚不到钱。
Jane: 就你感觉景德镇的城市规划跟政府扶持你觉得力度够吗?
星军: 我现在想他们也有一大半的产业来支持陶瓷。没有陶瓷景德镇没有办法发展得这么快。
Jane: 像今年的话樊家井倒了大概一半。
星军: 那是暂时的。以前也有这种事。
Jane: 那是什么时候?
星军: 03 年 04 年也有两年生意不景气的时候。你看宋朝,元朝景德镇的瓷器不怎么出名,到
了清朝才是鼎盛时期。市场也不能一直火。
Jane: 市场也有一个规律?
星军: 是啊。前几年市场也有点滑坡。
Jane: 所以你的意思是说现在少了一半没有关系。
星军: 那肯定。像开店一样。你刚开店生意也是不好做。我是老开店的，可能一年半年不赚钱还坚持得住。你刚开始投资，不盈利你就坚持不住。
Jane: 所以比较晚做的比较难坚持?
星军: 那肯定。他经济基础不行，肯定坚持不住。像老开店的，他关不了，他赚了很多钱他转向了，搞别的东西。像我们这样一下子转行不适应。也不是说马上转一个行，钱又不是那么多，也需要一个磨合期。我相信今年生意惨淡，明年生意会好一点。
Jane: 就是等这个经济危机过后，他们说现在这个全球市场也是处于比较低迷的状态。泉州的外贸也很多。
星军: 泉州它东西更多它多元化，像景德镇它光做陶瓷。泉州像机械，轻工业，服装，鞋。
Jane: 所以泉州还可以?
星军: 还可以。跟温州比还差一点点。我以前在温州也待了两年。
Jane: 那温州现在抚州人在那里也多了是不是?
星军: 很多了。像我们这样很多，全国各地都有。
Jane: 那像泉州现在这个市场怎样?
星军: 像温州宁波今年都差不多。
Jane: 都比较差一点?
星军: 嗯。就是你刚刚说的生意低谷期嘛。
Jane: 做的人多吗?
星军: 做的人还不是差不多。也不是生意好不好。生意淡一点，人勤快一点，多跑一点也是一样的。以前瓷器好卖不用到处去跑。现在生意难做，你要勤快一点，多跑一点。收益也会大一点，持平就差不多，差不多。
Jane: 你是自己一个人到泉州的吗?
星军: 我们几个人。要是我一个人走掉店不是关上门了吗?
Jane: 你们大概有几个人?
星军: 我们四个人。
Jane: 都是老乡吗?
星军: 都是老乡。
Jane: 一般你们抚州人出去找本乡的比较多是不是?
星军: 其他的也有。一般都是抚州的，景德镇的。景德镇的以前也合伙过。很多景德镇的跟我们抚州的合伙。合伙投资，一个人没有那么多资金。比如说要二十万，一个人不够呢，就两个人；四十万，两个人不够，四个人。像我们老乡投的多的有投一百多的。一般仓库里都要拿四五批的货。
Jane: 就是做得大的一个人就要一百多万了。
星军: 要。
Jane: 那他们一般都在大城市吗?
星军: 中小城市也有。
Jane: 所以就是中小城市也有这样的大商贩。
星军: 因为我们都有车，是不是？就有撤送。几辆车批货。像泉州一样的，像我们送到安溪，石狮，漳州那边也可以送去。方圆一百公里都可以送去。
Jane: 你们有送货上门的服务?
星军: 嗯。都可以送过去。
Jane: 那你们有自己的车吗?
星军: 有，都是自己的车。
Jane: 几辆?
星军：至少一辆，根据他们做生意的大小来说。最少有一辆。发展业务需要，跑不过来就两辆。再跑不过来可以再加一辆。
Jane: 那像你们去景德镇拿货会特别跟老乡拿货吗?
星军：那也是一样的看哪种，适合自己的，价钱也适合的，哪里拿也一样。不是说老乡，哪里产品一样，价钱适合，合理一点，我们在哪里拿。
Jane: 你们除了跟景德镇人合作以外，会不会跟都昌人合作?
星军：因为我们毕竟不是很熟悉，也有。不是说都昌，鄱阳的也可以。以前在景德镇混熟了，跟哥们一样就划得来，也有的。但很少。
Jane: 所以一般合作都是本乡人?
星军：家里的。都是彼此非常了解不是一般了解。
Jane: 这样比较安心
星军：不了解的做一般的朋友可以，但那个生意毕竟是长时间的，不是一天两天的。
Jane: 所以现在跟你合作的都是你很熟悉的同乡人吗?
星军：嗯。同乡亲戚。同乡也有，亲戚也有。
Jane: 因为跟钱有关系是不是?
星军：就是彼此对对方有信心。如果是换了别人，我不放心他，他还不放心我呢。也有跟别人合伙，合不来了。毕竟两个人合伙不是十分了解，有时候生意做了一月两个月，生意好了，还好，如果生意不好，赚不到钱就彼此怀疑，就要拆伙。拆伙没亏本还好，如果是亏本了那就亏得更大。那么就麻烦了。
Jane: 在景德镇抚州人去做学徒的这一块你了解吗?
星军：做学徒的，那很多呢。
Jane: 那一般都会找同乡人吗?
星军：那不要紧。谁也可以只要勤快。像我刚开始也有学做事。刚开始不喜欢做事，喜欢全国各地跑，不喜欢呆在作坊里做事。
Jane: 所以你刚开始也跟过师傅?
星军：那肯定要。也不叫师傅，反正什么都要人牵引一下。
Jane: 都是老乡牵一下头是不是?
星军：是啊，那时候什么都不懂。
Jane: 所以你们抚州人去景德镇是不是一般都是有亲戚或老乡在那里？然后你们过去就住在老乡那里?
星军：住我们都不要住老乡那里。刚开始我们来就住旅馆，像我们现在生意做得大了，在景德镇都有房子。
Jane: 你也有?
星军：我没有。在景德镇开店的，都买在景德镇。
Jane: 那老家还会去建房子吗?
星军：老家也有房子。都有。我朋友有的生意做得大了，在宁波宁波有，在泉州泉州有都有房子。做得很大的他一年赚几十万，哪里也有房子。到时候你看，回来的话就转手卖掉。
Jane: 所以会顺便带一点房地产投资?
星军：那肯定都是这样的。不用租房子，住自己的房子多舒服。小孩子也可以读书。
Jane: 那你小孩子在泉州吗?
星军：小孩子以前在泉州，但是他不适合外边，后来接回来，就待了一年。
Jane: 后来就回抚州了?
星军：回家里读书。
Jane: 那他今年几岁？
星军: 我小孩今年十多岁了。十一岁了，现在在上五年级了。
Jane: 那你们跑来跑去家庭的安置是个问题吗？
星军: 那没事。老婆跟妈妈在家里。
Jane: 那你在抚州有盖房子吗？
星军: 家里有房子，早几年就有了。在我们那里，像我这种年龄基本上都做了房子，都做了，
比我小几年二十七八岁的都做了。
Jane: 那你们那里盖一栋房子需要多少钱？
星军: 像我们以前做也就十万多一点，十万左右。
Jane: 盖几层楼？
星军: 三楼。我们那边一般都是三楼。做得不怎么大，一般也就一百多平方。
Jane: 百多平方的地皮，盖三楼？那已经很够住了。
星军: 住是肯定够住。我们那里还是很便宜。你像在泉州买一套房子五六十万还是很小的，
才一百多平方，是不是？
Jane: 有打算买？
星军: 暂时还没有考虑。
Jane: 所以老家有房子就好了。
星军: 一般我们在一个地方不如他们在一块七八年十来年，我们也就是一两年也不知道以后
生意怎么样。要换地方，买过来也不怎么样。
Jane: 那你们会先盖家里的房子，还是在外面买房子？
星军: 那肯定是要盖家里的。家里有老人小孩要住房子。
Jane: 所以一般就现在家里，家里盖好了再考虑第二套第三套房子？
星军: 那肯定，你要一步一步来。不会一下子有那么多经济条件是不是？
Jane: 你说抚州有一半的人在景德镇？
星军: 景德镇有一半抚州人。景德镇有将近一半人是来自抚州的。我们抚州如果是来一半人
还住得下？
Jane: 所以你们抚州比景德镇大？
星军: 我们抚州也是地级市，我们是市府的。人口多。有十多个县市。
Jane: 那人口数目有多少万？
星军: 像景德镇市区也就四五六十万，我们那边的人可能就有二十万。
Jane: 你们抚州的就有二十万在那里工作？
星军: 也不管是做瓷器的。也有搞建筑的。景德镇大部分建筑也都是我们抚州人。大工业也
大部分是我们抚州人做的。
Jane: 像那些卖防盗门的，卖木材的，卖建材的？
星军: 房地产的都有。也是抚州的，大多都是抚州的。
Jane: 抚州人做建材吗？
星军: 也有。
Jane: 所以说建筑跟陶瓷两大块有很多抚州人做。
星军: 抚州人不光是这样的还有开餐馆的，开饭店的，卖水果的。 很多呢。要不怎么会这么多人。卖服装的也有。什么都有。我们家那边在景德镇做生意的很多，基本上有什么生意，
基本上都会有抚州人。
Jane: 抚州人还蛮喜欢做生意的。
星军: 这怎么说呢，做生意的也有，做手艺的也有。
Jane: 在九几年，2000 年，抚州人做元青花的比较多。那现在？
星军：我跟你说，那个时候元青花比较流行。我们到外面也比较好卖。
Jane：哦，原来是因为元青花比较流行所以很多人都做元青花。
星军：也不是说九几年，有时候流行粉彩。粉彩就会特别特别多，销量特别大。有时候流行青花，有时候流行珐琅彩。那个时候一个时候不同。都慢慢做起来。
Jane：所以抚州人不只是专攻一项东西而已，而是到那个时候到底有什么东西流行？
星军：那肯定是。那市场流行什么东西就做什么东西。
Jane：那他们跟的师傅不一定是抚州人是不是？
星军：那也有景德镇人。我们抚州人刚开始当师傅也是有的，但毕竟是少数，本地人当师傅的多一点。我们抚州人当师傅的当了十二年，再教就是师傅了。要做出东西好，有比头。看过了，大家都觉得很好，你就没有师傅了。大家觉得你做出来的东西可以，你就做师傅了。你的销量肯定会大。哪个师傅好，哪个瓷好，我们就会跟他说。这个产品你也帮我做一个。他就会跟你说，你大概过几天过来拿。
Jane：所以你们一般合作的就找当地人，向别人拿货的时候找是那个人好？
星军：那肯定是看那个人好。我们都知道的，哪种产品，哪个窑里面出来的，就在哪里拿。我们刚开始也是到处看的。就在樊家井的大街小巷转转转，一家一家的作坊看，看哪一家的好。那时候九五年也要看你的运气，觉得这个东西看到可以会有点市场，把他买回收到外面去。运气好的话可以卖得了，运气不好的话，不好的东西拿出去也卖不掉。
Jane：所以说你拿的东西跟市场的喜好也是很有关系的？每个城市还是有自己的风格，是不是？
星军：那肯定。我们只是做一个参考，觉得这个东西很好看。我们有百分之五十的把握觉得这个产品可以，拿到外面还有市场。但有时候也有看走眼的时候。你比方说我这次挑了五件，运气好的话，这五件都能出手；运气不好的时候，我挑了五件，客户只看重了一件。当然也有一件都看不上的时候。这主要靠自己的运气。一般我们不能代表客户，是不是？一般客户买了我们才盈利是不是？我们刚开始做的时候还不能替呢，要现金交货。我们到景德镇来买。两百块一个，我们买五个，就先给他一千块，我们货可以带走。五个都卖掉还可以，五个都不动，我们这个货还要压起来放着，我们还要回来重新看，重新选。
Jane：如果说你买五个一千块，那你一个会卖多少钱？
星军：那也不一定，有时候卖得好，我印象最深的是九五年的时候，那时候我第一次跑贵阳，我跟我那个师傅，我刚开始什么也不懂。身上好像带了三千块钱，买了不到一千块钱的货，就几百块钱，我刚开始也不懂，从里面挑了几种，在外面半个月除了吃除了住，还赚了一千五。第一次的时候。因为第一次做生意，人比较勤快，天天担心，住夜吃饭，天天要一百块钱一天，住一个星期七八百过去了。着急到外面去勤快一点。后来第一次做赚到钱，我就勤快了。我就把几个东西放外面，我就不管了，然后就连续亏了几次。
Jane：然后再一次就比较勤快一点了。
星军：刚开始是，做了一次你有一些老客户就认为没事管他买不买，能不能卖得出去，没有负担。刚开始的时候可能没有成家，没有负担，赚多少花多少，后来成了家有压力，就会努力去做，把这件事做好，做到最好。
Jane：像你们抚州人有人做名人名作的吗？
星军：名人名作有抚州人，景德镇人也有，抚州人也有。好多陶瓷学院的好多都是我们抚州的。好多抚州人在陶瓷学院里面教书呢。不是说读陶瓷学院，是说当老师的。不是很多，是有那么一部分。当然也有省外的，一般也都是有在陶瓷这方面的天赋，有一定的造诣。
Jane：那你们在外面一般会拿名人名作去卖吗？
星军：一般我们不拿这些，价钱很高。
Jane：那你会买现代陈设瓷去卖吗？
星军：我什么都卖，客户需要什么我们就买什么。一样都会放一点在店面。

Jane：然后根据市场的需要再加量。

星军：哪种市场大，就哪种补充。补足市场的需求

Jane：政府能够做什么来帮助这个市场的话，能帮助你们在外面销售的人，你觉得政府有哪些可以去做的？

星军：一般政府帮不了我们什么。

Jane：比如说他们把景德镇的牌子打得更响一点，你们就更好做一点。

星军：景德镇的牌子本来就很响。

Jane：那质量监控呢？

星军：我不是说过了吗。真正的景德镇的瓷器质量是很好的，一般到大商场都是免检的。
一般贵的，景德镇名窑名厂做的，那个好的到超市里，那个价钱都很贵的，不是一般的家庭
也不会去买那种。那好的一套几千块。差一点的普通一点的几十块上百块。一般的也就几百
块。好的一套几千块甚至上万块。几千块的也有。

Jane：你说景德镇的牌子在外面是没有问题的。

星军：那肯定没有。我们跑到全国，都是以景德镇的牌子。一般卖仿古就不打景德镇
的牌子。

Jane：为什么？

星军：因为卖仿古都是景德镇以前出来的，现在都是仿照以前做出来的。景德镇的瓷器以前
是官窑。都是进贡皇宫的。你不可能到这个时候还留在景德镇。到时候卖的时候都是打的安
徽，道州，河南的。

Jane：是因为如果打景德镇人家就觉得不是真的？

星军：那肯定。

Jane：那为什么打安徽或河南卖得掉？

星军：因为来江西景德镇卖仿古的，都知道是假的。仿古，一般人也就当古的卖。方说仿
古，高仿，景德镇还可以。像以前，比我还早一点的时候，不是卖仿古，都是当古董卖。那
古董哪里有那么多。

Jane：所以说如果是高仿的就可以当古董卖，景德镇的？

星军：像我们现在做民用瓷的，起家的也都是卖仿古起家。都是十多年以前卖仿古起家。

Jane：那你们十多年前就会跟人家讲是安徽的吗？

星军：全国各地都说得不一样，有说河北，到处也说。像我们十个人出去，不可能十个人都
说是安徽的，你说谁相信。安徽来这么多。

Jane：这个很奇怪不讲是景德镇的。

星军：我刚才不是跟你说，仿古的，景德镇出的都是官窑的。官窑的景德镇都进贡到皇宫里
去了。皇宫是贡品，都是将相王侯才有的，一般到民间是没有的。民间也有也是民窑，也
不能打景德镇的牌子。是真的景德镇的，人家也不会相信。因为景德镇的它模仿模仿得非常像，
基本上看不出来，基本上可以模仿到百分之百。像我们以前卖的，很多真的不是摔了半个，
还留半个瓶子，我们让他们给接上基本上看不出来。叫什么专家看下面也是老的。上面他们
就看得出来怎么下面是老的，上面是新的。经常碰到这种事。摔了，剩下半截他是必须要加
工的。加工成原来的样子，就一模一样了。下面是真的就不光专家去鉴，老的就是老的。上
面专家用仪器测新的就是新的，他也分得出来是不是？像他们拿到的时候我们就说下面真
的，上面假的，不可能吧，怎么可能？像我们就这样跟他们说。那个时候大多数都这样赚。
因为那个时候这个生意好做。

Jane：都是打半截的？

星军：也不是都是打半截的，有真的，但是是不值钱的真的。也有到民间收购，我们那时
候也有到乡下收购。它真的是真的，但是价钱不贵。一个两二百，拿出来卖个四五千有时候是有的。

Jane：那它们就是真的古董了。
星军：本来就是古董

Jane：但是樊家井的东西就不敢说是景德镇的？
星军：樊家井也有老的，不值钱的。老是老，你看那些有些是元朝的东西不值钱的，都是土葬的，都是一些老人陪葬的不值钱的东西。拿到市场上也就卖个一百两百的价钱。那个时候抓得很严。那时候我还小，我师傅知道他跟我讲的，八八年的的时候，他们赚得好的就有一百多万。还有些是我们家里运过来的，就是老人死后埋在棺材旁边的，那个高度差不多有五十来公分高，直径就四五公分大。我们那里老人死后都有这种陪葬。一般一个坟墓好好的挖出来都有两个到四个。那时候我师傅说，收过来才四十块，从我们家里收过来。然后拿到成都去卖六千一个。听我师傅讲，那时候赚得很快。像那时候收过来的碗啊碟子什么的小小的，收过来也就五块十块二十块不等，看他们那个残缺程度，来看价钱。那时候我们四个人去，下了火车进入市场，那时候口袋，西服里面拿一个碗出来。大多数人不是客户买的，都是四川那些开古董店的。他出来，这个多少钱？一百。我要我要。给了再从另一个袋子拿出另一个出来，多少钱？两百。我要。我听我老师说，第一次来卖的时候，四个人好像两点多钟，下了那个成都火车，后来坐到新阳工（音译）那个市场那边，不到半小时的地，不到两点半的时候，还不到三点半就上火车。卖完了，又买了返程火车票回家。

Jane：那个时候很好卖？
星军：那个时候很好卖，那个时候几个人都发财了。后来就不行，就是我跟你说的那个瓶。陪葬的卖六千，那时候出得很少，只出了五六个，后来一下子出了四十多个。有几个大包上火车被掐掉的，后来就抓得很严。后来我就拿些小的要销就销不过去，抓得很严，剪票的地方，就过不去。九九年的时候也抓过一次，就不能出去。都抓掉了。后来，好像是景德镇出来一个古董，没事。后来到全国各地就都没查了。有一段时间也抓了，抓了我们就销不出去。

Jane：仿古的？
星军：仿古的。

Jane：就说这是赝品？
星军：是是。它本来也就是。我们那个时候卖给大多数，卖给各个地方的老板，他也知道是赝品。像我们买过来三五十，卖他几百上千的。他说这个好看，我当赝品放在家里。

Jane：他也知道是景德镇的？
星军：大多数都知道。他就说我就当假的买。一般大多数老板都是这样的，不然我们的市场没这么大。古董，哪有那么多古董？

Jane：很多说它做得很逼真，就当假的买。
星军：不是很逼真，是基本上就一模一样。景德镇的瓷器，什么东西它都是按照书上做下来的。高度，宽度，长度，厚度。那都是按照书上做下来的。

Jane：现在仿还是很贵？
星军：还是有几千块的。几万块的也有。

Jane：有些瓷厂下来的工人做东西也是可以的。
星军：那也要看什么，一般要内行看。像我外行，刚开始来的时候拿到什么也是好的。景德镇贴花的，用模子做上去的，不要土利那个坯。我们也看很好看。贴花的其实很简单，十几二十块钱买来。贴花的跟画上去的，我们看也差不多。

Jane：摸上去不太一样。
星军：我知道。但有些做另类一点，你也摸不出来。像我们做得久看得多的时候。画工好一点的我们都知道。刚开始我也看不懂，这个小的，这么小买过来要两百，我们那个时候九几
年就两百。这么大这么高的，画出来才二三十块，我就搞不懂。我就问我老师说这个怎么搞的你是不是搞错了价钱。这么大才卖二三十，这么小的要卖一两百。我老师说你以后就知道，做的时间长了，人家画工要多少时间去画，而且画得很好，一看就知道。其实之前的都是手工画出来的，一笔一笔画出来的。

Jane: 一个瓶子有时候要画一两个月两个月呢。
星军: 有有有。画得好的要画几个月。
Jane: 那种重工粉彩。
星军: 那个画出来就是几千块甚至几万块。
Jane: 那个也要看师傅的功底。功底好的，画一两个月一个瓶子。我有一个朋友就是买了一个瓶子是一千三，花了一个月画的。重工粉彩，师傅就说你收着，会增值。
星军: 一千三的也不怎么样。
Jane: 因为她是学生，他们就卖得比较便宜，他们是艺术瓷厂的老工人。要评职称的那种。
星军: 你看你到陶瓷学院去玩，他们也是整天在画在描在写。
Jane: 陶瓷学院他们的功底也是仿古吧？
星军: 仿古也有
Jane: 就是工笔画为主。
星军: 他很多学生都是一条龙的，从利坯到画都会，都要学的。
Jane: 拉坯、利坯、吹釉。
星军: 那个时候我经常去玩就看得到。那时候我们常去看。看他们跟我们的大师有什么不同的。看到有好的也要把它买过来。他们也会问我们哪里做得不足。
Jane: 他们也会问你们，挺好的。他们现在礼拜六会在乐天雕塑瓷厂有一个摊位，就是学生的作品还卖得蛮贵的。
星军: 学生的作品也看。有些研究生出来的也贵。时间长了，功底也还可以。像刚刚读的也不是怎么样。
Jane: 他们有的是大师的学生做的。有的是毕业生做的。有工艺美术学院的，有陶瓷学院的，有鲁迅美术学院的（鲁美的）。我就有买一些首饰是他们做的。
星军: 那也看，也不是说大师的就好。有些大师做出来也不如大二大三的。
Jane: 他们评职称有的时候也是乱评的。
星军: 你看大师出来评也要看他的产品。大师都是大师，那也要看他的产品出来，也要看画工。不是说你这个大师名气这么大了什么都好的，也不是这样。
Jane: 有的说他们有时候请人画，画完之后就落款，就说是大师的作品。不然大师一年哪有那么多作品。
星军: 像那个字画都有这样的。像外行可以。像内行就不一样。像这个大师的作品我买过一次。再买过一次他落的款，但画不不一样了。每个人有每个人的性格，是不是？不可能画得一样，人家一看就是假的。卖给别人玩可以。卖到外面做生意就不行。画工是这样的，两个东西，他自己画的放在这里，他学生画的，放这里让老师来落款。两个放在这里都看得出来，基本上相差很大。就会知道，这怎么搞的。
Jane: 你们不会去金昌利进东西吧？
星军: 以前送人有。那里的东西贵得很。那个时候买来送朋友，买到我们家里送亲戚。
Jane: 也是买大师的。
星军: 买得贵一点。刚开始买过樊家井的东西。樊家井的东西刚开始也不便宜。到莲社那里东西贵一点，有点好的就到莲社去了。
Jane: 国贸你拿得多吗？
星军: 我们也不是说拿得多。哪里看得中就在哪里买。这个我们也没算过。我们买东西买得
太多了,不知道在哪里买了多少，你都不知道自己买了多少。
Jane: 一般你们会跑哪几个市场？像樊家井。
星军: 有卖的地方我都有到。我们买的地方都是到处转。我们那时候买的时候几个人拧着包，
放在袋子买了，放回去又再来。
Jane: 就是到处转。你会去老厂吗？
星军: 你会去老厂吗？
Jane: 新都也会去？
星军: 哪里都会去。这里也看看那里也看看，看有什么不一样的。像我们经常来这里买的，
哪里都会走，不可能跑一块的。跑一块的话，别人有的东西你就没有了。
Jane: 那你这几年也算是有赚到钱？
星军: 像我们生意做得少，赚得不多。也就工资钱呗。像我们天天转转，天天坐车开销也很大。
Jane: 还要寄回家里面吧。
星军: 那肯定，我们不寄回家里，家里也没钱吃饭什么的。都是要我们寄回家。一般是剩不
了多少钱的。
Jane: 那你寄回家一个月要寄多少？
星军: 那要根据我们家里情况。一般小孩子一两个，一个月也就一千左右，两千不等。你看
家里要买什么东西有时候三千四千也有的。
Jane: 根据每个人的情况。
星军: 一般我们小孩子都在外面，走到哪里带到哪里。有的人把爸妈也带着生意做得大点的。
就都带在外面。
Jane: 像你们在外面遇到什么事的时候抚州人会团结吗？比如说在景德镇？
星军: 在外面不能比景德镇，景德镇很小。像我们在外面就几个人在一块，不可能有很多人。
Jane: 对。那像在景德镇福州人会比较团结吗？
星军: 那也看是不是一块的人。一般我们做生意，各做各的生意。也不需要产生什么矛盾。
Jane: 如果说有什么事情的话你们会共同团结起来吗？
星军: 一般像我们四个人合伙的有什么事肯定要团结起来的是不是？
Jane: 所以是小圈子，现在没有什么大圈子需要要团结起来抵御什么东西。就没有什么这种
情况？
星军: 是。像我们几个人合伙就几个人。一般也没什么事在外面。我们都是做正当生意。
Jane: 没有什么拐骗的事？
星军: 那个事没有。像我们现在卖这个日用瓷，大多数就是批发给人家小店。
Jane: 外面的人可能会对抚州人有点误解，好像抚州人都是在外面杀猪的。你怎么看这件事？
星军: 抚州人是这样的。就是说卖仿古瓷。大部分人就这样说我们是骗子啦。杀猪的，说
难听一点是这样子。现在卖这个民用瓷，你看像这个碗，十个一绑，二十个一绑。我们拿过来
十块，卖给你十三块。你觉得买得过去有钱赚，你就买我们的。你没有钱赚就不买我们的。
我们不勉强。我们价钱标这个。你要稍微赚点钱。你买过去做生意，你也要赚钱。价钱，就
是进货钱，你觉得高了，就不要进这个。像我们做得很死的，十三块就是十三块。卖完了，
打电话要求送这个再送多少件，再给你送过去。现在就这样子的。
Jane: 你们还是算是比较本分。像做仿古的话比较容易被人家骂。
星军: 现在做仿古的很少，家里也有。去年好像我老乡有个小伙子被他赚了几十万。八十六万好像。
他买过去好像才十几万人民币。高仿。买过去好像十九万。卖了八十六万，自己好像赚了六十六万。
Jane: 这个就是他们所谓的杀猪的问题吗？
星军：就是这个。
Jane：就是仿古当正品卖。
星军：他卖的时候是这样的。他卖了八十六万，那个人也是要转手出去的。他也还要赚钱。
Jane：就是他们一起当古董卖这个价吧？
星军：不是，你是卖古董的，你是客户我是老板，你看中了我这个东西。我们就讨价还价，最后订下了八十六万，这样就成交了。你给了我钱，这个产品给了你。你拿去你也不是留着，你也再做生意。再去拿去卖。
Jane：那这个买的人他知道买的是高仿吗？
星军：他看出这个是真的不是高仿。高仿也高不了那么多钱。
Jane：我就说高仿也卖不了八十六万。
星军：高仿顶多是三五万，是这样的，他进货也进不了这么多。我那个老乡他卖瓷器也知道客户需要这个货。他故意要他二十万。卖得掉卖不掉就算了。最后就被他给卖掉了，卖了八十六万。就两个人赚钱是吧？开店的也赚钱，其实他买过来不过几千块。他也差不多赚了二十来万。但是他更多，六十多万。
Jane：所以他们所谓的杀猪也就是这个意思。
星军：我们刚开始淘第一桶金还不是这样子。那时候在外面坐牢的也很多。杀猪的，坐牢的也很多很多。
Jane：那你觉得杀猪的有其它本地人吗？
星军：也有。也是有本地人做这个行当的。
Jane：就不只是抚州人？
星军：那肯定。一块的人不可能做得出来的。像你是老板，你来卖我这个壶。说这个你是买过来的，我说是真的，你也不是很懂。你肯定要叫专家来鉴定一下。他叫专家来，也不是叫就叫来，他要出场费，他一般来至少给他一两万。你要请个专家你要给他一两万。专家来的时候我就把专家拉到一边。我就问专家他给你多少钱，专家就说出场费两万。我给你五千，八万，只要说这个是真的五万，八万甚至是十万，只要他说是真的两边的钱都赚到了。两万赚到了，这个十万赚到了。我还有这个生意做成了。我如果没有做成，一分钱也没有。他赚得更多是不是？一般都是这样。一般杀大猪都要两个人配合，要专家配合。后来他知道也怪不了我们，因为专家都说是真的。他找专家没有，专家也不是百分之百能看得准的。
Jane：还有很多人是买老胎。老胎下去画的时候就查不出来。
星军：查得出来，只要一点点假的就查不出来。
Jane：那为什么有的就看不出来呢？
星军：看不出来，老胎新做都看得出来。
Jane：那为什么有些时候专家会看不出来？
星军：不是看不出来，是看走眼了。看得出来，一般都是用金钱塞的。
Jane：所以一般都是看得出来的，用那个仪器测就测得出来？
星军：一般都是用金钱塞的。他给专家两万，我给八万十万。只要你说是真的，那边两万拿到了，还有我这边的钱。
Jane：所以大部分都是这样子？
星军：是，不然哪有那么多好赚的钱。
Jane：所以他也是把这个拍卖市场弄得很混乱。
星军：拍卖行拍的东西大部分是真的。
Jane：有很多也是假的，景德镇做的（道听途说）。
星军：拍卖行要公证，一般假不了。你看在北京有北京公证，在上海有上海公证处。公证出来的都是有法律效果的。

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Jane: 他们说现在拍卖行也有故意买假东西的。
星军: 那个买了，他有法律责任的。拍卖行假不了。拍卖行有公证的。公证假的是真的，万一查出来怎么办？他公证的也吃不消。他查起来就麻烦了。他范围就打了。
Jane: 他们在北京，有一次在琉璃厂碰到一个人，就是说现在整个北京的拍卖行只有嘉德还可以，其它的话都不太可信。不太能够做出来是真的样子。
星军: 那也不是这样子。到了拍卖行也不是一个专家看的，是很多专家看，是集体专家，大家看了，仔细的用仪器测。一般那个都假不了的。一般是假的他们测出来就是假的。真的他们测出来就是真的。在我的印象里，他们没有假的测出来是真的，真的测出来是假的。都是测得出来。像我以前卖过古货，也是仿元的，到那个贵阳中化院，人家几个人一看就知道是假的。后来那个老板说假的我也要，只要价钱适当的说一下。那些专家说画工相当好。他说有收藏的价值，他这样说。那时候我们要的价钱也不高。
Jane: 要了多少？
星军: 那时候买过来也要六百，卖给他才两千四。
Jane: 那不算是杀猪。
星军: 那时候那个人是什么商场的经理，是华侨可以免税的。我们做个朋友。买过来，我下次再跟你做生意。其实很多人都这样说的，但是我们都没有机会做下次生意。
Jane: 那如果六百卖两千四也还好。
星军: 那没意思。也不是一个人，那时候两个人。吃一顿饭，坐一下车都不够。
Jane: 那你们毕竟比较诚实，开价没有很高。
星军: 那是当假的卖卖两千四，如果不是当假的，哪里卖两千四。
Jane: 你们想卖真的？
星军: 如果没有测出来，那两千四哪里买得到，至少要十万以上。两千四买一个脚也买不到。那是那个时候。现在到古货店买那个仿古的，也要三万四万。在这里买就三万五万。
Jane: 一般做高仿的是不是都不开店？就是高端仿古，价钱在一至三万五，还有人开店吗星军: 有有。开店的都有，像我老乡就是开店的。东西都是五千以上的。
Jane: 在樊家井吗？还是在筲箕坞？
星军: 在樊家井。至少也在五千以上才在他店里。他店里的东西很少，也就是几十个东西在他店里。今年生意不好，去年还好。去年从端午节到腊月的时候，他们盈利一百多万。今年好像不行，听他说保本，没怎么赚钱。
Jane: 樊家井听说从原来四千多家，到现在两千多家。
星军: 有些他转向了，是这样的。以前也是开店的现在跑到全国各地去。其实他还在做只是没有开店。
Jane: 就是仿古这块市场比较饱和了嘛。不只是国内市场有人跑，国际市场也很多人跑。所以说所有的仿古在景德镇生产的比较多，毕竟比较有那个资源。
星军: 那也要看什么东西。像我们买也不是光买景德镇的。像安徽也有，河南也有。
Jane: 也有做仿古？
星军: 也有也有。浙江也有做仿古。龙泉窑啊，不就是浙江。
Jane: 哦，就是说仿是仿哪里的。是不是说仿清，仿明，仿宋的话还是景德镇。但是像龙泉窑，均窑，定窑，汝窑，他们也有仿的仿那个地方的。
星军: 是。
Jane: 所以你相信明年的市场还会起来，是不是？
星军: 希望吧。
Jane: 不是相信是希望。
星军: 一般也不会有几年是这样子的。
Jane: 所以仿古这个东西，你是看它传统手工艺，还是它是一个骗人的像赝品一样的一个行业。你是怎么看这个行业？
星军: 它本来就是传统的。是一个传统的行业。
Jane: 那像他们落款打的都是大清，康熙啊，还是乾隆年制啊，你会不会觉得这些落款不是很好？
星军: 像我们一般卖都不要落款的。卖落款的都是当便宜的卖。我们拿到外面都不落款的。大多数都不落款。
Jane: 为什么不落款？
星军: 因为落款，把人家搞醒了，什么什么年代的，也有不落款的，他比较容易接受一点。不落款的人家容易接受一点。落款的人家很难接受。
Jane: 落款的就是官窑的，人家可能更难相信这个是真的。
星军: 是啊。

7.4.2.3.18 Interview Transcript Brief Review: 10, 11

Interview Transcription Brief Review 10 11

ITBR 10_1 20081019

对象: 李师傅
地点: 艺术瓷厂
内容:
- 瓷厂倒闭的内幕
- 怎样保持景德镇民间传统陶瓷手工工艺
- 政府应该了解民情民意
- 省级大师不能支持整个陶瓷产业
- 大师作品跟传统工艺还是有很大区别（包括颜料）
- 颜料化工起死回生

ITBR 10_2 20081019

对象: 李师傅
地点: 艺术瓷厂
内容:
- 新彩很多地方都有，新彩的颜料跟粉彩的颜料不同
- 粉彩的颜料一般都是家传，不外传（传给儿子）
- 景德镇的传统有粉彩，青花，颜色釉，青花玲珑，四大名瓷
- 展厅的不是原厂的，看了搞得最好的可能还是艺术瓷厂
- 瓷厂倒闭，但是都有党委书记

ITBR 11 20081019

中国艺术陶瓷创意产业高峰论坛
7.4.3 Field Notes

7.4.3.1 Beijing Field Note

7.4.3.1.1 Inspiration on fieldwork in Jingdezhen, 20080916 in Beijing

According to Interview 4, Dr. Tong introduced several places in Beijing for me to visit antique and new Jingdezhen porcelain. Beijing, the capital city of several reigns is the biggest consumer of fine porcelain wares. Today, I visit Panjiayuan Flea Market. There are some spots specialized in antique Jingdezhen porcelain found overall China. There was one spot selling Jingdezhen antique found in Fujian province. The porcelains were probably found in sink ships along the coastline of Fujian province. There was a antique collector using microscope to look at the surface of a vase, it was to exam whether that piece is really from that age and is really from Jingdezhen. He said, the antique market is a mess in China at the moment. The real stuffs missed up with fake ones and are very hard to tell; even antique specialists could not distinguish a real antique and a fake one (Pomfret, 2008). He said now Jingdezhen produce different kinds of porcelain and ceramics, the market is quite broad. After that we also visit some shops that sell new Jingdezhen wares, they look new and very flesh. It is different to tell the styles as many of the new ones even are not fake ones (as the shopkeepers told us they are new porcelains), the styles are very similar to what we just found in the antique spots. The price range is quite wide from several hundreds to several thousands. The market does not have a standard price. It could be just in the reproduction and antique market, not other markets, however it requires further exploration.


7.4.3.2 Jingdezhen Field Notes

7.4.3.2.1 Literature guides fieldwork, 20081013 in Jingdezhen

This is the forth day for me to investigate in Jingdezhen. Before I come and do the field work in Jingdezhen, I have read:

1. Fang, LL. 2001 The old town flies away: old stories in the capital city of porcelain, Qunyan Press.
4. Fang, LL. 2000 Tradition and Changes: Investigation into the History of
Jingdezhen’s Folk Porcelains. These books help to guide the direction of question design and direction of research. The book Tradition and Changes written by Dr. Fang has special impact on my research direction. It contains rich information about the traditional form of porcelain production as well as current development of porcelain industry in Jingdezhen. There is a special chapter about consanguineous, location and occupational groups. Around this three dimension of relationships, it makes the characteristics of Jingdezhen porcelain production from Ming Dynasty and so on. I am curious about this phenomenon, and wondering if it is still a feature nowadays. After investigating in two porcelain markets: Shaojiwu and Fanjiajing, I found out although consanguineous and location bond is still exist, it is not the old form which carries strong restriction, protection against people from other regions. Shangjiwu and Fanjiajing are centres for reproduction of old porcelain, there is nearly 100% shops, which are small private workshops. Most of them are family shops. Some couples drawing porcelain and send away to fire; some pay workers to draw and send away to fire; some workshop they have their own kiln, therefore they could fire the porcelain themselves. Even drawing, it has very clear division of labour that who draws flowers and birds could not draw mountains and water; who draws mountains and water could not draw patterns; who draws patterns could not write, who write could not blowing green etc. Therefore these workshops just specialized in one or more procedures each; they have to cooperate with other craftsmen or workshops to complete every piece of porcelain. There is very few shops which have enough craftsmen to complete a piece of porcelain by themselves. In Jingdezhen, the market is highly specialized, Shangjiwu and Fanjiajing are centres for reproduction of old porcelain, Jinchangli and Guomao are centres for daily used ceramics, Taocidashijie is centre for art pieces of porcelain by famous artists. It needs further investigation to find out each the specialization of each market and how the entrepreneurs operate their businesses. Nowadays, the rent price in Fanjiajing is about 3000-4000 per shop, whereas in Shaojiwu is about 1000-2000 per shop (Per shop is about 25 meter square). Shop owners all agree that this year is hard for business, the financial crisis in the USA has influence the sales in Jingdezhen. Economy of Jingdezhen has depressed. Because the huge number of Jingdezhen reproduction porcelain customers are from overseas. Now the financial crisis is not only remain in the USA, but impacts the financial markets in France, Russia, Brazil, Japan etc. However, some shop owners perceived it as an opportunity.

7.4.3.2.2 Fieldnote 20081014 in Jingdezhen, Jingdezhen pottery culture exhibition spot and ancient kiln ceramic factory tour

Today, I have been to the culture exhibition spot in Fengshushan. The culture exhibition spot has two parts, one is historical museum, and the other is ancient kiln. The ancient kiln is actually called ancient kiln ceramic factory. There are numerous shops within the ancient kiln exhibition area. Some of their products are made within the factory. The factory is not ran by an individual company or by the government only, but a number of private companies and workshops rent houses within the factory
and make production. I met a lady whose parents were from Fuzhou, but when I asked her where she came from, she said she is from Jingdezhen. She told me her origin after I asked questions about her parents. Fuzhou people is a big group in Jingdezhen since Qing Dynasty, but nowadays they are not as close as they used to be. Another shop owner who was from Fuzhou originally told me that they are competitors in the market. Yes, they still keep contact with fellow from their village, but only within a small group of people.

7.4.3.2.3 Fieldnote 20081015 in Jingdezhen, Reading at Jingdezhen City Library

景德镇市地方志编纂委员会, 2007, 景德镇年鉴 2007 年版, 江西省方志出版印刷有限公司 P198
2006 年, 全市有陶瓷工业企业 (含个体民营等非公有制企业) 2846 家, 其中规模以上企业 46 家, 规模以下企业 400 家, 个体作坊 2400 家, 新引进陶瓷及配套企业 75 家, (其中内资 57 家, 外资 18 家) 从业人员 8 万多人。全年陶瓷工业总产值完成 32 亿元, 比上年同期增长 30%; 陶瓷出口创汇 3605 万美元, 比上年同期增长 64.8%。

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封燃气梭子窑 203 座, 131 户迁入新都民营陶瓷园, 40 余户已签订合同在陶瓷工业园民营陶瓷苑购地建窑设厂。

2006 第三届陶瓷国际陶瓷博览会圆满举办。
国外: 12 个国家, 27 家企业
国内: 十大大区 618 家企业前来参加展示; 3200 名采购商（其中境外 1200 名）前来采购; 约 10 000 名中外游客前来观光。
引进 1 亿美元, 引进内资 30 亿元

景德镇市地方志编纂委员会, 2003, 景德镇年鉴 2003 年版。
景兴瓷厂和艺术瓷厂的改制方案已由职工代表大会审议通过, 进入实施阶段。景兴瓷厂已签订解除劳动合同的职工 1100 多人, 实体解约工作已完成 70%。艺术瓷厂莲社北路厂房已开始拆迁; 景德瓷厂、红旗瓷厂的改制方案, 也有市联审通过。景兴、艺术两户企业按照陶瓷工业结构调整的要求, 实施退权进园。同时公司积极争取国家政策支持, 对宇宙瓷业有限公司实行政策性破产做了一定基础工作, 即将前面展开。

2001 年景德镇统计年鉴
2000 年国有日用瓷厂中仅有艺术瓷厂没有负数的利润总额
人民瓷厂
景兴瓷厂
光明瓷厂
为民瓷厂
宇宙瓷厂（国有独资）
东风瓷厂
新华瓷厂

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红旗瓷厂
艺术瓷厂
建国瓷厂

7.4.3.2.4 Fieldnote 20081016 in Jingdezhen, Basic information and interview notes

樊家井仿古村
三条街加一条横街约 500 间店面，每间约 3-4 家个体户，一共有 1500-2000 家个体户
筲箕坞
一条街约 100 多间店面，每间约 3 家个体户，一共有 300 家个体户

日用瓷都是私人承包
用人：几十个人到一两百人
资金：几十万元起

Interview Note (without recorder)
1. 谭先生，景德镇本地人
原光明瓷厂技术科
景德镇工艺美术学院毕业
拥有几十个人的私坊，其中有亲友，有老瓷厂的下岗工人，有外地人
2 家共用一个店面，月租 3600 元，约 20 平方米
1 - 中高档粉彩、珐琅彩瓷-本地人（二房东）
2 - 祭红颜色釉-本地人（一个货架）

2. 曹小姐，景德镇本地人
原红旗瓷厂 下岗（先生原人民瓷厂，现开出租车）
红旗瓷厂为日用瓷厂，所以画瓷技术是跟亲戚朋友学的
瓷厂工作为大锅饭
作坊：雇用本地亲戚朋友（外地人作坊：雇用外地亲戚，朋友，乡里）
樊家井外来人占大多数，总共商家不下 1000 家。
现在本地下岗的人多了，学瓷的人也多，有画不同派系的，譬如青花、粉彩
画青花的有，本地，抚州，鄱阳
2 家共用一个店面，年租 70000，月租约 6000 元，约 50-70 平方米
后院年租 6000-7000 元一年
1 - 青铜器-抚州 （二房东）
2 - 粉彩釉上彩-本地 （一个货架）

3 饶小姐，抚州人
请了十来个人，都是抚州亲戚，包吃包住
樊家井有 60%抚州人
租店面前互不认识
4 家共用一个店面，包括房东，其他三家月租共 4500 元，约 25 平方米
1 - 青花-本地（房东）
2. 珐琅彩，粉彩-抚州
3. 揪丝珐琅铜器-抚州
4. 树画石-抚州

4. 无名 女 49 岁 德镇本地人
原红旗瓷厂下岗，没有保证金
父母都是陶瓷研究院，7501瓷 北科探秘
父-利坯
母-画图、设计
兄弟四人，除姐姐外，包括哥哥与妹妹共开了三个作坊
你了十来个人，从做胎开始，都是亲戚朋友
釉上彩可以买白胎，然后釉上加工
青花不能买白胎，要自己做，自己画
3家共用一个店面，月租 1800元，约 6 平方米
1. 青花，青花斗彩-本地
2. 釉上彩-本地（白底金鱼戏水罐）
3. 釉上粉彩-本地

5. 无名 女 抚州人
做青花一次性请人做坯，烧窑即跟别人一起搭窑，其它自家人做
抚州人大多数做青花，但也包括斗彩、颜色釉、粉彩、石雕、青铜器、木器、杂器
五家共用一个店面，月租 2000元，约 10平方米（因为位子不好，要下一个台阶，所以比较便宜）
1. 五彩-都昌（夫妻店，夫画妻填，一天生产 4个，一个利润 20元，二房东）
2. 广彩-乐平
3. 青花-抚州
4. 韩国瓷-抚州
5. 青花-本地

7.4.3.2.5 Fieldnote 20081017 in Jingdezhen, In-depth information about the ten state factories in Jingdezhen

1. 范先生与他的朋友
瓷厂消息：
十大瓷厂倒闭跟 99 年和 2000年市长更换有关。因为前市长不懂瓷器，为外行且没有重视十大瓷厂的发展，改组没有成功。
光明瓷厂卖了 3000多万，还有一部份没有卖。
瓷厂私营后有请一部分下岗工人，但只有请技术组的，大部分下岗工人还是没有事情做。
1993年十大瓷厂大部分已停产，一部份工人已经下岗
1995年开始十大瓷厂里出现私有承包
1996/1997年下岗特别多
岳父母 1996年下岗退休，原红星瓷厂，主要做日用瓷
一般瓷厂会帮忙买 10-15年的社会保险，如果有人剩下 5年，一般帮忙付完 5年就完了，并没有津贴补齐另外 5年
现在的国贸为东风瓷厂原址

樊家井消息：
没有按照正规程序出租，只凭口头协定。
2007年涨了两次房租（余女士：有时候一年涨四次房租）
2008年初因为本来要搬到皇光市场，加上市场不景气，所以2008年没有涨价
2005-2006本来要搬到新都民营陶瓷城，但政府政策不够强硬，所以梭式窑没有全部搬出樊家井，只要梭式窑一跑，青花就跑；青花跑，粉彩就跟着跑（匡：因为樊家井房东们花钱请老爷爷老太太手挽着手在村子口，挡住来执行任务的工商人员，所以才没有搬成）。
房东有的一个月光房租就挣7万，有的挣3万，都不上个人所得税
乐平人在樊家井有几百人，比较多是画花鸟的，也有画人物的
很多做高仿青花的都不开店，要到家里去买，且只卖给特别熟的人。
2008年，做瓷器的改行的很多

范先生 陶瓷职业中专毕业
2家共用一个店面，月租4200元，共50-70平方米
1-粉彩釉上彩-本地
2-瓷板、仿古红木家具-抚州（二房东）

2.无名女
2家共用一个店面，月租1500左右，7平方米
1-铜器-本地人
2-影青瓷-抚州
每天能刻3-4个影青瓷瓶，然后上釉，后入窑烧制

7.4.3.2.6 Fieldnote 20081018 in Jingdezhen, Information about Zhongguotaocicheng

g.小姐 中国陶瓷城
老板主要做餐具，老板弟弟做现代陈设瓷。
店里面前面卖日用瓷（餐具、茶具），后面一块地方卖现代陈设瓷
刚开一个月不到，2个销售人员
国贸主店，中国陶瓷城分店
月租600/月 80平方米
卖餐具多过陈设瓷，买主以游客为主
一条流水线，4-5个工序，共有20来个工人

7.4.3.2.7 Fieldnote 20081019 in Jingdezhen, The development of Jingdezhen porcelain in the past fifty years

苏女士 原艺术瓷厂职工
祖籍南昌，父亲50年代来景德镇，苏女士60年出生，父亲来景德镇学陶瓷，后进了艺术瓷厂，苏女士为职工子女，1979进厂
兄弟姐妹5人，一妹，三弟，只有妹妹跟苏女士从事陶瓷产业，妹夫的父亲为原艺术瓷厂
长，妹妹在陶瓷大世界
忙的时候请妹妹，儿子和媳妇帮忙，还有一个徒弟是自己找上门的，有时候请他/她帮忙。
儿子在陶瓷馆范敏棋手下当学徒画瓷器。苏女士填瓷器。
1997年下岗，苏女士开始在楼上租月租2000元的厂房，雇佣原艺术瓷厂下岗工人，进行生产。
2003年跑展销，3个人合伙7万多，分担风险，03年在德国亏了2万，在马来西亚一人挣了6000元，还有一位老家人一起跑展销。
97年原厂给他们买了保险
原艺术瓷厂有工人3000-4000人
批量生产，计划经济
文化大革命时只生产冬瓜瓶、鱼尾瓶、花篮瓶。
工资，计时超产计奖，
300件-3同大碗
100件-1同大碗
创新，却走不出传统的框框
范在艺术瓷厂搞粉彩，还有一段时间做管理，还有分配的工作。就是每天早晨分配任务，开票，发单子根据每个人的生产能力，和情况分配领颜料。
倒厂的理由：
厂里负担太重
大锅饭
有的人吃饭不干活
有的走后门不做事
前市市长舒小琴政策性改组，让十大瓷厂倒闭
也可能是厂长甩包袱

人民瓷厂-青花
建国瓷厂-颜色釉
红光瓷厂-玲珑瓷
光明瓷厂-青花玲珑瓷
艺术瓷厂-陈设瓷（粉彩），日用瓷（出口加内销）
红旗瓷厂-釉下彩
红星瓷厂-日用瓷
宇宙瓷厂-日用瓷
景兴瓷厂-内销日用瓷
东风瓷厂-壶
（见P116《景德镇陶瓷古今谈》）

7.4.3.2.8 Fieldnote 20081020, Jingdezhen International Ceramic Fair

红光瓷厂61年开始
现在下属企业有2600人，分块搞小厂
改组前有员工3000名
主要搞日用瓷，一部分搞陈设瓷
(采访对象是搞管理的)

红旗瓷厂 主营青花日用瓷
分厂：远景，没有开店，接订单
承包商：10家以下
现在有1000-2000人工作
解体前有2000-3000人
有原厂厂房被拆掉，为了修路

人民瓷厂 主营青花玲珑
下属单位：福万利
承包商：10家以下
现在员工-无法统计
原来有4000-5000名员工

为民瓷厂
个体私营：80家
现在员工：2000多
原来员工：3000多一点
下岗时厂里帮忙买保险

建国瓷厂
94年就不发工资了
余小姐96年自己干
建国原来有3000-4000人
现在留守人员30-40人
原建国瓷厂员工在里面租厂房的约有五家

光明瓷厂（张师傅（艺术瓷厂）：光明瓷厂属于一夜倒闭）
现在有80-90家企业
1997年改组，1994年起就不发工资了
原来有近3000名员工
现在有1000多人，基本上都是做日用瓷，也有工艺瓷和艺术瓷等
2007年开始帮员工买医保
（采访的对象为原瓷厂做行政管理的，现在也是）

Field Note 20081020 (b)

红星瓷厂 58年开始
96年1月份改组
原来职工1700多人
约30-40家租下了厂房
现有为1100多人交养老金，已不在生产线上
现在无法预测现在人数
景兴
约 2000 年解体
安旭 包括加工有 70 多人，30%为原景兴老工人，其他为招聘
自己搞设计
以订单为主，也做名人名作的加工
以国内市场为主，包括（天津，苏州，浙江）

7.4.3.2.9 Fieldnote Note 20081021 in Jingdezhen, Field note in Xindu and Fanjiajing

新都民营陶瓷园（上午）/ 樊家井（下午）
无名男 鄱阳人
老板作坊在新都，店在国贸
¥4-5 元/平方
一条龙，从做泥开始，烧窑都是自己干
请人：招聘

无名男 乐平人
青花
没有店面；从樊家井小康村搬来，原来也没有店面
都是上门取货
自己买店面，买了 2 间
一条龙
拿到北京去卖
一共请了 6-7 人，有招聘的，有亲戚朋友
上半年清了十来人，下半年请 6-7 人，今年难做，客户拿货比较少

无名男 景德镇人
日用瓷，陈设瓷
店面在国贸，原来在老厂
一条龙
一共 7-8 个工人，有招聘的，有亲戚朋友

无名男 景德镇人
原来在樊家井作坊
店在国贸
一条龙
雇工有 10 个人左右，有亲戚，有招聘的

无名男
原来在老厂，
没有固定工人，现在有临时工 9-10 人
做订单，没有店面
临时工聘用没有考虑亲属关系

陈 物业管理处
新都有近 300 家作坊
有的有窑，有的没有
100 多家是卖出去的，100 多家是租出去的
商家从筲箕坞、老厂、樊家井搬过来
三期即将开始
¥5/平方
管道开通，有需要才开通
无名男 景德镇人
做雕刻
租的 搭窑
原来在老厂（老厂作坊比新都多，但房子差，拆迁了，所以搬过来）
一家五口人，没有请工人
做订单，没有店面

无名男 抚州人
青花
租的 搭窑
原来在樊家井作坊
店在国贸
4-5 人，都是抚州人，之前都不认识，属招聘

无名男 鄱阳人
青花仿古为主
搭窑
原来在里村，店在樊家井
店面自己买的
请了 5-6 人，有招聘的，有朋友介绍的
儿子画，父亲卖

无名男 广东人
主营字画、茶具
一人店，接单多
店面租的
景德镇的问题：
1. 宏观商业管理 — 做仿古的素质不高，跟管理者的矛盾，根本不能宏观调控。宜兴紫砂壶比景德镇好多了
2. 景德镇的艺术瓷的价格跟仿古瓷形成巨大差距
3. 外来瓷器（尤其是日用瓷）对景德镇造成冲击的情况
4. 过分炒作大师
5. 新都不适合开店，太远，不方便
樊家井
无名男，40-50岁，樊家井周遭居民
1987年樊家井开始形成市场
可以在网上找瓷都信息港：樊家井仿古村
樊家井福建莆田人拿货最早
村庄保护主义比较严重，他们没有田地，如果没有仿古一条街，生存将是个问题
很团结，当初开始沃尔玛，打算封了国贸通往仿古村的路，但是因为村民很团结，坚决反对，最后没有封起来。

7.4.3.2.10 Fieldnote 20081024 in Jingdezhen, Second visit to city library of Jingdezhen

景德镇统计年鉴 1987 景德镇市统计局编 国营江西宜春资料印刷厂 1988 年 5 月出版
p.3-4“景德镇是一个新兴的工业城市。经过30多年的建设和发展，改变了由于历史原因形成的单一陶瓷的工业畸形结构，逐步建成为以陶瓷为主，包括采掘、电子、机械、建材、轻化等具有良好基础的综合工业生产基地。
“陶瓷工业是景德镇市工业的主体，在整个国民经济中占有重要地位。1987年底，全市共有陶瓷工业企业和为瓷业服务的工业企业121家（以下见照片）”

p.214-216
瓷业企业及为瓷业服务的工业企业121家。其中

<table>
<thead>
<tr>
<th></th>
<th>总数</th>
<th>全民所有制</th>
<th>城镇集体所有单位</th>
<th>全部职工人数</th>
<th>工资(万元)</th>
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<td>8</td>
<td>11</td>
<td>5757</td>
<td>859.4</td>
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景德镇统计年鉴 1998 景德镇市统计局编 国营江西宜春资料印刷厂 1999年7月出版
p.180-1 在所有独立核算集体工业企业主要经济指标当中，陶瓷制品业，尤其是当中的日用陶瓷制品业亏损最为严重，为 -384.7（-464.8）万元
p.182-3 市直属独立核算主管部门主要经济指标当中，41个陶瓷工业公司中16个亏损企业，利润总额为 -2556万元，但是陶瓷股份公司为盈利公司

景德镇统计年鉴 2000 景德镇市统计局编 国营江西宜春资料印刷有限公司 2001年7月出版
p.178 市直属独立核算主管部门主要经济指标当中，41个陶瓷工业公司中17个亏损企业，利润总额为 -2703万元，但是陶瓷股份公司为盈利公司

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<th>利润总额（万元）</th>
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<tbody>
<tr>
<td>p.184-191</td>
<td>p180-187</td>
</tr>
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</table>

人民瓷厂 -432.0 -450.0 1759 1767 国有
景兴瓷厂 -134.1 -137.8 1562 1575 国有
独立核算集体工业企业主要经济指标中，陶瓷制品业利润总额为539.6 万元，日用陶瓷制品业利润总额为289.5 万元。

独立核算集体工业企业主要经济指标

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</tr>
</tbody>
</table>

First Trial in Coding

7.4.4.1 Translation of Interview One

9月4日 15:25 P.M.
采访对象：王缉慈老师
年龄：62岁
教育背景：北大附小
清华附中
北大地质地理系
80年北大教书直到现在（2008）
研究兴趣：经济地理学中的工业地理学
工作：北京大学城市与环境学院教授

Jane: What is your opinion towards current Chinese industrial cluster research?
Wang: Chinese industrial cluster research is probably the biggest industrial cluster research group in the world. Now it is very hard to estimate how many people are doing this kind of research. In general, Economic Geography, Economics, Sociology, Management, even Culture, Engineering and Agriculture majors in every university, all have people researching in industrial cluster. At present, a lot of people still read huge amount of overseas literature, these literatures are too many
and it is hard to read them all. A lot of people read the original overseas literature or translated literature; in Chinese, even plagiarize literature from the Internet. Then, they use these literature into Chinese industrial cluster research. Now, a lot of research is still at its early stage.

Jane: Therefore, does it mean that it is more about theory application, rather than theory innovation and exploration?

Wang: Yes! Yes!

Jane: Currently, do scholars emphasize more on contemporary development of cluster or pay attention more on the historical origin of cluster?

Wang: To me, I don’t know much about others, I still emphasize more on contemporary development, especially the problems faced by Chinese industrial cluster and its upgrading methods.

Jane: So, do you think researching its contemporary development could better deal with or solve current problems, therefore you would spend more time in current cluster development.

Wang: Yes, yes! But now there are some people researching on its development channel from Evolving Economic Geography or Evolving Economics.

Jane: You mentioned some people start this research, do you think it will help the cluster modernization?

Wang: Of course. Within this, we have to talk about what is Chinese industrial cluster that is Chinese has a huge amount of so-called industrial cluster. That is different from Innovative industrial cluster in developed countries. That is to say China has many labour-intensive clusters, many firms stay in one place, but not necessary have real cooperation. Competition within many firms is vicious. Moreover, maybe there are many firms stay together today and tomorrow they may disperse, may disappear. There is a great number of this survival cluster in China. Therefore, I feel (Recently I have a feeling that). These clusters do not have much difference from clusters formed in history. That is what I say there is not much difference. Even, I feel, do you know about Sanxingdui in Sichuang Deyang, there is a tourism district called Sanxingdui specialized in bronze vessels process. There is a Sanxingdui Museum. When I saw Sanxingdui, I think of in Bronze Vessel Age, there must be many workshops in bronze vessel process, or similar to Marshall’s industrial history. Therefore, now a lot of clusters, actually are similar to this phenomenon. They are similar to the history and they are also similar to current developing countries like India and Brazil and many others. They do not have to be competitive, they could die out immediately.

Jane: Could you predict in what aspects could traditional cultural research contribute to contemporary clusters or industries?

Wang: I think traditional cultural cluster, this question I have never think about. Do you mean traditional cultural cluster like Jingdezhen?

Jane: Similar to it.

Wang: Could you list other examples?

Jane: Such as silk from Suzhou, embroidery, tea industry as well as some traditional snacks. Snacks is smaller, but silk and traditional carving.

Wang: I know now, we have been to Shandong Gaomi recently, there is paper-crafting(剪纸), also Hebei Weixian’s paper-crafting, as well as pastry-crafting(泥塑), as well as new year painting(年画), these are mostly developed from country area. Henan University has teachers researching this area, they call it countryside special industry zone. There is some more in Hunan, they have a topic research current countryside cultural industry zone. Such industrial zones have industrialized,
or at the early stage of industrialization, or something earlier than that. But it is not totally like that, they could exist forever, but it does not have to industrialize, neither develop into contemporary industry. Such cluster, there are craftsmen, old craftsmen, old craft, there is touch knowledge, I did not link it with many industrial clusters, but I feel that this aspect has to explore Chinese cultural arts tradition, for it will bring economic benefits in international or domestic market. It is very important.

Jane: This time I found a trademark call China Intangible Cultural Heritage (非物质文化遗产).

Wang: Yes, yes, yes!

Jane: It seems to be a highlight in Tourism, like Xiamen has China Time-honored Brand, China Intangible Cultural Heritage, they will stimulate consumption.

Wang: I like this stuff very much.

Jane: From your point of view, you have been to many areas have traditional cultural industries, such as Shandong you just mentioned, what do you think if there is any features in the traditional industries that has not protect well or missed out?

Wang: I notice that. I often think about toys I played when I was young, such as what you could see from the TV about Beijing temple fair, like Kongzhu (空竹), play Kongzhu, Caigaoqiao(踩高跷), Tuoluo (陀螺). These are toys I played before, but now have missed out, many people totally have no idea, many young people totally have no idea. I think such traditional cultural products have to be restored, all worth promotion.

Jane: From your point of view, what makes some clusters successful? What attributes do they have?

Wang: There are some clusters in China I think are very successful, like apparel industry in Wenzhou, I could not tell how many firms it has, but like Mesters/bonwe, Baoxiniao. Mesters/bonwe has appeared in the stock market few days ago. There is another firm called Tengxu, it is operated by an female entrepreneur called Xu Yunxu, now they also design for Italian firms. Why Wenzhou has firms like Mesters/bonwe and Tengxu, I think there are many supporting firms, many apparel firms competed and developed. The apparel association in Wenzhou is very strong. I saw a news from the Internet yesterday that it starts to invest 10 to 20 million to establish apparel R&D centre, in Beijing or in Wenzhou. I think it reveals that the apparel cluster is successful.

Jane: Because they have their own R&D centre?

Wang: Yes, yes! They have their own R&D centre, and also their association is very strong. The shoe industry in Wenzhou is not too bad, it has many brands like Aokang, Kangnai, Hongqingting and many others. In addition, apparel industry Fujian Quanzhou, like Septwolves. This is all developed after the new Economic policy based on a lot of supporting firms.

Jane: Could you generalize the most important feature of these cases?

Wang: Its feature, first of all is they have very strong industry associations. Local industry has some big leading firms initiate these associations. These associations could at times organize activities. They could organize activities with government, like some local exhibition and fairs, all kinds of forums, bringing firms to visit (other firms) even go overseas to visit, to learn their experiences. Other than that is there are professional school locally, like Dongguan shoes school, training is advanced. Moreover, Chinese industrial clusters have a very important feature is professional market. There are professional markets allover, like shoes industry has professional markets. Shoes materials, shoes feather could be found locally. There are many research about
In the professional market, there are more current problems to research. Moreover, there is government support. First of all, government does well in open market policy, local government has loose environment, there are many new firms established, the market environment is good. If there is not cluster or economically undeveloped area, in general their market economic conditions are not good, the plan economy of the government is very obvious. Therefore, what kind of role the government plays is very important. In some areas that clusters develop well are those government could actively cooperation with industry association to achieve many tasks, including invest in establish professional market, establish basic facilities, policy support to SME. There is one more feature is relevant to what have mentioned, entrepreneurs. There are talents, entrepreneurs that can find capital, raise capital. Basically that is all. Therefore, under these situation, local firms could enter domestic and international market, when there is anti-dumpling, they could fight against locally.

Jane: Talk about government, in my observation, the functions of government have some differences in the East and in the West, is it?
Wang: Yes, in China the government has greater functions.
Jane: I also found that. I found this has something to do with culture. Western is more individualism, and government is harder to practice some projects or plans. In China it seems such problems are less here, right?
Wang: Yes. In China, especially local governments have great function. You could talk from the Olympics, what says the public is government could do whatever it wants.

7.4.4.2 Coding I

9月4日15:25 P.M.
采访对象: 王缉慈老师
年龄: 62岁
教育背景: 北大附小
清华附中
北大地质地理系
80年北大教书直到现在(2008)
研究兴趣: 经济地理学中的工业地理学
工作: 北京大学城市与环境学院教授

Jane：请问您对于中国产业集群的研究现状有何看法？
王：中国产业集群的研究可能是世界上最大的研究产业集群的队伍(A1 中国集群研究的规模 size of Chinese cluster research population 最大 The biggest)。现在很难统计有多少人在进行这方面的研究。基本上各个大学的经济地理专业、经济学专业、社会学专业、管理学专业，甚至文化方面的专业，工程方面的专业，农业方面的专业都有人在研究产业集群(A2 进行集群研究的学科范畴 The scale of majors researching in cluster concept 很多 plenty)。现在的现状时很多人还在看海外大量的文献。因为文献实在是看不过来，太多，太多了。很多人都是看国外文献或者是别人翻译过来的国外文献，还有国内，甚至是网上可以抄袭到的文献。就是用这些文献套用到中国产业集群的研究里面去。现在，大量的研究还是处在一个初级阶段(A3 运用大量的文献 use huge amount of literature 初级阶段 at the early stage)。
Jane：所以是不是说更多的是在于理论的运用，并不是理论的创新和开发上面(A4 理论应用 theory application)？
王：对！对！

Jane：请问现在（当前）的学者是否更注重于集群的现代化发展，或者更注重于集群本身的

历史渊源、起源？

王：从我来说，我不是很了解别人，我还是更侧重于现代化发展，尤其是目前中国产业集群所面临的问题和它升级的途径（A5 现代化发展 contemporary development 所面临的问题和升级的途径 problems and upgrading methods）。

Jane：所以您会不会觉得研究它的现在发展比较能够应付或处理现在的问题，以至于您愿意更多花时间在现在整个集群发展上面（A6 问题处理 problem solving）？

王：对，对！不过现在也已经有人开始从衍化经济地理学或者是衍化经济学方面研究它发展的路径（A7 其他方向 different direction 衍化经济地理学或者衍化经济学 Evolving Economic Geography or Evolving Economics）。

Jane：您提到有些人开始这样的研究，那您觉得这样的研究是否对于集群现代化的研究有帮助？

王：当然有帮助（A8 有帮助 helpful 集群现代化研究 contemporary cluster research）。这里面要说到到底什么是中国的产业集群（A9 中国产业集群定义 the definition of Chinese industrial cluster），就是中国有大群的所谓的产业集群。就是跟其它发达国家的那种 Innovative 的产业集群不一样，创新性的集群是不一样的。就是中国的很多集群都是劳动密集型的，很多的企业在同一个地方，但不一定真正的协作。很多的企业之间甚至是恶性竞争的。而且可能今天很多的企业在一起，明天就散掉了，就不存在了。这种 survival cluster 在中国很多很多。所以我觉得（我最近的一个感觉就是）这样的集群和历史上所形成的那样集群没有太大的区别（A10 现在与历史集群的比较 the comparison between current and ancient clusters 没有太大差别 no much differences）。所谓没有太大的区别就是它这样的，我甚至觉得，我不知道你知道不知道在四川德阳有个三星堆，有个旅游区叫三星堆是青铜器的加工。一个三星堆的博物馆，我到那看到三星堆的时候我就想到在青铜器时代这个周边一定有很多做青铜器这方面的一些作坊，或者是很像 Marshall 的 Industrial History 这样，所以呢，现在所谓的集群，其实就是这样的一种现象。历史上是相像的，而且跟现在发展中国家，的像印度、巴西很多都很相像的（A11 中国集群和其他发展中国家的比较 comparison between Chinese clusters and that of other developing countries）。并不是说这样一些就一定是 Competitive 的，有可能他一下子就死亡了。

Jane：您可否预测一下传统文化集群的研究可能从哪几个方面对现代产业有帮助？

王：我想传统文化的产业集群，这个问题我还是真没考虑过。你所谓的传统文化产业集群可能就是指的是景德镇这样的

Jane：类似

王：还能举得出其它的例子吗？

Jane：(A12 传统文化产业的范畴 the scope of traditional cultural clusters) 像苏州的丝绸、刺绣、茶工业，包括像一些传统小吃美食这种方面。小吃还比较小一点，但像丝绸、传统雕刻王：我知道了，我们最近到山东高密那个地方还有剪纸，还有河北蔚县的剪纸，还有泥塑，还有年画，这些大部分都是在农村地区发展起来的。河南大学有老师一直在做这方面的研究，他们叫做农村特色产业区（A13 传统文化研究 traditional cultural research）。河南现在还有这些，他们有一个课题研究当前农村的一些文化产业。这样的区我觉得是现在很多工业化，处于工业化初期阶段的一些集群，好像是它们的，比它们更早一些的现象。但是也不完全是，它们可能会永远存在的，不一定说就会变成工业化了，不一定会发展成现代工业。这样的一些集群，它那个地方是有艺人，老的艺人，有老的手工艺，有 touch knowledge，有衍含经验为知识的交流。我倒是没有把它和现在很多的工业集群完全联系起来。但是我觉得
那一方面要挖掘中国文化艺术的传统，使它能够在国际市场上或国内市场上发挥经济的作用。这方面应该是很重要的。

Jane: 我这次发现国内开始有一个商标叫非物质文化遗产。
王: 对！对！对！
Jane: 它好像成为旅游业的亮点，像厦门有中华老字号，中国非物质文化遗产，这方面它就会刺激消费。
王: 我是很喜欢这一类东西的。
Jane: 就你看来，你也去过满多就是有传统文化产业的地区，就像你讲的山东那个地方。您认为传统产业当中有哪些特点在现代当中没有很好保存或者流失的?
王: 我看到。我常常想到小的时候的玩具。就比如现在常常在电视上看到的北京的庙会的像空竹，玩空竹，还有就是踩高跷，还有陀螺（传统文化产业范畴 the scope of traditional cultural industries）。这些东西都是我小的时候玩过的，但是现在都失传了，很多人都完全不知道了。很多人都完全不知道了（传统的流失 tradition miss out）。我觉得这一些传统的有文化内涵的产品都应该恢复起来（对保存传统产业的倡议 advocacy of protecting traditional industries），都是非常值得发扬的。

Jane: 根据您来看，就是现在中国的集群当中，有哪一些特质就是让它们很成功的？就是中国有哪些成功的集群的案例，它们有什么特质？
王: 中国有一些集群我认为是很成功的（中国成功集群案例 Chinese successful cluster cases）。像温州的服装业，我现在说不上它到底有多少企业。总而言之像美斯特邦威，还有那个报喜鸟。美斯特邦威，它叫作美邦品牌，它前几天上市了。温州还有一家企业叫腾旭，是温州一个女企业家叫徐云旭创办的，现在也为意大利的企业作设计。温州为什么会出现像美斯特邦威或腾旭这样的企业呢？我觉得它是在很多的企业，配套的企业，很多的服装的企业竞争发展起来的。而且温州的服装协会很强大，我昨天在网上看到它开始要投资1000-2000万建服装研发中心，好像是在北京或者是在当地。我觉得像这种情况就是说它的服装产业集群就是比较成功。

Jane: 因为他们已经有自己的研发中心。
王: 对，对！他们有自己的研发中心，而他们的协会很强大。温州的皮鞋业也是很不错的。它现在已经出现了很多的品牌（中国成功集群案例 Chinese successful cluster cases）。像奥康，还有康奈，红蜻蜓，好多的。另外福建泉州的服装，像七匹狼。这些都是在改革开放以来当地有大量的配套企业的基础上发展起来的（案例成功的原因 reasons of their succeed）。

Jane: 那您可不可以简要的来概括一下这些案例它们主要的几个特点（成功案例的主要特点 the features of successful cases）。
王: 它的特点首先是有很强大的行业协会（强大的行业协会 strong local organizations）。当地本行业有一些比较大的龙头企业牵头成立的这些行业协会。这些行业协会，可以经常和组织企业的一些活动。和政府一起组织活动，比方说当地的一些展销会，还有各种各样的论坛，还有就是带着企业去参观甚至到国外去参观，学习经验。另外就是本地有专业的学校（专业学校 professional institute），像东莞就有鞋业学校，培训这些方面都很发达。另外一个就是中国的这些产业集群的一个很重要的特点就是专业的市场（专业市场 professional markets）。到处都有这样的专业市场，像鞋业有专业的市场，鞋料、鞋革在当地都可以解决。当然关于专业市场现在研究得很多了。还有很多当前的问题值得研究。另外就是政府的支持（政府的支持 government supports）。首先是政府在一般这些地方就是改革开放做
得比较好的，就是本地有政府比较宽松的环境。然后就是有很多的企业创业。也就是说市场环境比较好。在凡是没有集群的地方，或者是经济落后的地方，一般就是市场经济条件不好的，政府计划经济痕迹很明显的一些地方。所以政府是怎样一个角色是很重要的（A27 政府作用的重要性 the importance of the function of the government）。在一些集群发展比较好的地方就是政府能够积极地配合行业协会做很多很多的工作，甚至投资建专业市场，或者做很多的基础设施的建设服务。还有就是有政策方面的支持，对中小企业有政策方面的支持。还有 一个特点就是跟刚才有关的 就是有企业家（A28 特点五 feature 5 企业家 Entrepreneurs）。就是本地有能人，有企业家，能够自己去找钱，去融资的能力。基本上就是这样一些。所以在这样的情况下，本地的企业就可以共同进入国内和国际市场。有时候国际上遇到反倾销，当地都可以应对。

Jane: 讲到政府，在我的观察看来就是政府的作用在东方跟在西方好像有点差别是不是？
王：是的。在中国政府作用很大（A29 中国政府跟西方政府在集群中作用的比较 the comparison of the function of Chinese government with western government）。

Jane: 我也发现这一点。我发现这跟文化性有关。西方可能个人主义比较强一点，政府在实施、落实一些方案或者是计划的时候好像有点推不太动的感觉。在中国这样的问题好像不太大，是不是？
王：对。在中国尤其是地方政府起了很重要的作用。你从奥运来看你就可以知道政府就是，老百姓的话就是政府想干什么就能干成什么（A30 中国政府的能力 the capability of Chinese government）。

7.4.4.3 Coding II

<table>
<thead>
<tr>
<th>ID</th>
<th>Interview Text</th>
<th>Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td>中国产业集群的研究可能是世界上最大的研究产业集群的队伍。</td>
<td>World biggest Cluster research population</td>
</tr>
<tr>
<td>A2</td>
<td>现在很难统计有多少人在进行这方面的研究。</td>
<td>Hard to calculate Actual number of researchers</td>
</tr>
<tr>
<td>A3</td>
<td>基本上各个大学的经济地理专业、经济学专业、社会学专业、管理学专业，甚至文化方面的专业，工程方面的专业，农业方面的专业都有人在研究产业集群。</td>
<td>A great scale of academia Research in cluster in China</td>
</tr>
<tr>
<td>A4</td>
<td>现在的现状时很多人还在看海外大量的文献。</td>
<td>Use overseas literatures</td>
</tr>
<tr>
<td>A5</td>
<td>因为文献实在是看不过来，太多太多了。</td>
<td>Too many literatures</td>
</tr>
<tr>
<td>A6</td>
<td>很多人都看国外文献或者是别人翻译过来的国外文献，还有国内，甚至是网上可以抄袭到的文献。</td>
<td>Use overseas literature</td>
</tr>
<tr>
<td>A7</td>
<td>就是用这些文献套用到中国产业集群的研究里面去。</td>
<td>Use overseas literature into Cluster Research</td>
</tr>
<tr>
<td>A8</td>
<td>现在，大量的研究还是处在一个初级阶段。</td>
<td>Early stage</td>
</tr>
<tr>
<td>A9</td>
<td>Jane：所以是不是说更多的是在于理论的运用，并不是理论的创新和开发上面？</td>
<td>Theory application Not generating new theories</td>
</tr>
<tr>
<td>A10</td>
<td>Jane：请问现在（当前）的学者是否更注重于集群</td>
<td>Emphasis contemporary</td>
</tr>
<tr>
<td><strong>A11</strong></td>
<td>particularly the problems and upgrading methods of clusters.</td>
<td></td>
</tr>
<tr>
<td><strong>A12</strong></td>
<td>Better in problem-solving.</td>
<td></td>
</tr>
<tr>
<td><strong>A13</strong></td>
<td>New perspectives Evolving Economic Geography or Evolving Economics.</td>
<td></td>
</tr>
<tr>
<td><strong>A14</strong></td>
<td>Helpful Cluster research.</td>
<td></td>
</tr>
<tr>
<td><strong>A15</strong></td>
<td>Define Chinese industrial cluster Different from innovative clusters.</td>
<td></td>
</tr>
<tr>
<td><strong>A16</strong></td>
<td>Labor-intensive cluster.</td>
<td></td>
</tr>
<tr>
<td><strong>A17</strong></td>
<td>No cooperation.</td>
<td></td>
</tr>
<tr>
<td><strong>A18</strong></td>
<td>Negative competition.</td>
<td></td>
</tr>
<tr>
<td><strong>A19</strong></td>
<td>Instability.</td>
<td></td>
</tr>
<tr>
<td><strong>A20</strong></td>
<td>Many survival clusters.</td>
<td></td>
</tr>
<tr>
<td><strong>A21</strong></td>
<td>Has no difference with historical clusters.</td>
<td></td>
</tr>
<tr>
<td><strong>A22</strong></td>
<td>Has no difference with other developing countries.</td>
<td></td>
</tr>
<tr>
<td><strong>A23</strong></td>
<td>No necessary competitive.</td>
<td></td>
</tr>
<tr>
<td><strong>A24</strong></td>
<td>Traditional cultural cluster examples.</td>
<td></td>
</tr>
<tr>
<td>A25</td>
<td>我知道了，我们最近到山东高密那个地方还有剪纸，还有河北蔚县的剪纸，还有泥塑，还有年画。</td>
<td>Traditional cultural cluster examples</td>
</tr>
<tr>
<td>A26</td>
<td>这些大部分都是在农村地区发展起来的。河南大学有老师一直在做这方面的研究，他们叫做农村特色产业区。河南现在还有一些，他们有一个课题研究当前农村的一些文化产业区。</td>
<td>Research on village special cultural industrial zone</td>
</tr>
<tr>
<td>A27</td>
<td>这样的一些区我觉得现在很多工业化，处于工业化初期阶段的一些集群的，好像是它们的，比它们更早一些的现象。</td>
<td>Industrialization phenomenon</td>
</tr>
<tr>
<td>A28</td>
<td>但是也不完全是，它们可能会永远存在的，不一定说就会变成工业化了，不一定会发展成现代工业。</td>
<td>Non-industrialization possibility</td>
</tr>
<tr>
<td>A29</td>
<td>这样的一些集群，它那个地方是有艺人，老的艺人，有老的手工艺，有 touch knowledge, 有包含经验为知识的交流。</td>
<td>Experience exchange</td>
</tr>
<tr>
<td>A30</td>
<td>我倒是没有把它和现在很多的工业集群完全联系起来。但是我觉得那一方面要挖掘中国文化艺术的传统，使它能够在国际市场上或国内市场上发挥经济的作用。这方面应该是很重要的。</td>
<td>Economic function of traditional cultural cluster</td>
</tr>
<tr>
<td>A31</td>
<td>Jane: 我这次有发现国内开始有一个商标叫非物质文化遗产。</td>
<td>Trademark of traditional products</td>
</tr>
<tr>
<td>A32</td>
<td>王：对！对！对！</td>
<td></td>
</tr>
<tr>
<td>A33</td>
<td>它好像成为旅游业的一个亮点。</td>
<td>Highlight of Tourism</td>
</tr>
<tr>
<td>A34</td>
<td>像厦门有中华老字号，中国非物质文化遗产，这方面它就会刺激消费</td>
<td>Trademarks of traditional products</td>
</tr>
<tr>
<td>A35</td>
<td>Jane: 就你看来，你也去过满多就是有传统文化产业的地区，就像你讲的山东那个地方。您认为传统产业当中有哪些特点在现代当中没有很好保存或者流失的？</td>
<td>Missing out</td>
</tr>
<tr>
<td>A36</td>
<td>王：我看到。</td>
<td>Feature of traditional industries</td>
</tr>
<tr>
<td>A37</td>
<td>我常常想到小的时候的玩具。就比如现在常常在电视上看到的北京的庙会的像空竹，玩空竹，还有就是踩高跷，还有陀螺，这些东西都是我小时候玩过的，</td>
<td>Traditional products samples</td>
</tr>
<tr>
<td>A38</td>
<td>但是现在都失传了，很多人都完全不知道了。很多年轻人都完全不知道了。</td>
<td>Unknown</td>
</tr>
<tr>
<td>A39</td>
<td>我觉得这一些传统的有文化内涵的产品都应该恢复起来，都是非常值得发扬的。</td>
<td>Restore traditional cultural products</td>
</tr>
<tr>
<td>A40</td>
<td>中国有一些集群我认为是很成功的。像温州的服装业，我现在说不上它到底有多少企业。总而言之像美斯特邦威，还有那个报喜鸟。美斯特邦威，它叫做美邦品牌，它前几天上市了。温州还有一家企业叫腾旭，是温州一个女企业家叫徐云旭创办的，现在也为意大利的企业作设计。</td>
<td>Successful cluster with successful enterprise samples</td>
</tr>
</tbody>
</table>
温州为什么会出现像美特斯邦威或腾旭这样的企业呢，我觉得它是在很多企业，配套企业，很多的服装企业竞争发展起来的。

而且温州的服装协会很强大，我昨天在网上看到它开始要投资1000-2000万建服装研发设计中心，好像是在北京或者是在当地。我觉得像这种情况就是说它的服装产业集群就是比较成功。

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温州的皮鞋业也是很不错的。它现在已经出现了很多的品牌，像奥康，还有康奈，红蜻蜓，好多的。另外福建泉州的服装，像七匹狼。这些都是在改革开放以来当地有大量的配套企业的基础上发展起来的。

它的特点首先是他们有很强大的行业协会。当地本行业有一些比较大的龙头企业牵头成立的这些行业协会。这些行业协会呢，可以经常和组织企业的一些活动。和政府一起组织活动，比方说当地的一些展销会，还有各种各样的会议，还有就是带着企业去参观甚至到国外去参观，学习经验。

另外就是本地有专业的学校，像东莞就有鞋业学校，培训这些方面都很发达。

另外一个就是中国的这些产业集群的一个很重要的特点就是专业的市场。到处都有这样的专业市场，像鞋业有专业的市场，鞋料、鞋革在当地都可以解决。

当然关于专业市场现在研究得很多了。还有很多当前的问题值得研究。

另外就是政府的支持。首先是政府在一般这些地方就是改革开放做得比较好的，就是本地有政府比较宽松的环境。然后就是有很多的企业创业。也就是说市场环境比较好。

在凡是没有集群的地方，或者是经济落后的地方，一般就是市场经济条件不好的，政府计划经济痕迹很明显的一些地方。

所以政府是怎样一个角色是很重要的。在一些集群发展比较好的地方就是政府能够积极地配合行业协会做很多很多的工作，甚至投资建专业市场，或者做很多的基础设施的建设服务。还有就是有政策方面的支持，对中小企业有政策方面的支持。

还有一个特点就是跟刚才有关的就是有企业家。就是本地有能人，有企业家，能够自己去找钱，去融资的能力。
基本上就是这样一些。所以在这样的情况下，本地的企业就可以共同进入国内和国际市场。有时候国际上遇到反倾销，当地都可以应对。

Able to enter domestic and foreign markets and ability of anti-dumpling

Jane: 讲到政府，在我的观察看来就是政府的作用在东方跟在西方好像有点差别是不是？

王：是的。在中国政府作用很大。

Cultural differences, government in China has a greater function

Jane: 我也发现这一点。我发现这跟文化性有关。西方可能个人主义比较强一点，政府在实施、落实一些方案或者是计划的时候好像有点推不太动的感觉。在中国这样的问题好像不太大，是不是？

王：对。在中国尤其是地方政府起了很重要的作用。你从奥运来看你就可以知道政府就是，老百姓的话就是政府想干什么就能干成什么。

The ability of Chinese government

Great number of researchers A1 A2 A3
Premature research A4 A5 A6 A7 A8 A9 A46
Better in problem-solving A10 A11 A12
New research area A13 A14
Chinese clusters are surviving clusters A15 A16 A17 A18 A19 A20 A21 A22 A23
Traditional cluster and product samples A24 A25 A35
Traditional cluster research in village A26 A27 A28 A29 A30
Traditional trademarks with tourism A31 A32 A33
Miss out of features in traditional cluster A34
Should restore tradition A37
Successful cluster samples A38 A42
Supporting firms and environment A39 A42b
Strong business association support A40 A43
Training institution A44
Professional market A45
The importance of government support A47 A48 A49
Entrepreneurs A50
Cluster ability A51
Culture differences in government function A52 A53

Categories
Current cluster research ➔Great number of researchers
 ➔Premature research
 ➔New research area
Current cluster appearance ➔Chinese clusters are surviving clusters
Traditional cluster ➔Traditional cluster and product samples
 ➔Traditional trademarks with tourism
 ➔Miss out of features in traditional cluster
 ➔Should restore tradition
Traditional cluster research ➔Traditional cluster research in village
Contemporary cluster research ← Better in problem-solving
← Successful cluster samples

Attribute of successful contemporary cluster ← supporting firms and environment
← Strong business association support
← Training institution
← Professional market
← The importance of government support
← Entrepreneurs
← Cluster ability
← Culture differences in government function

7.4.4.4 Theoretical Analysis

(Interviewee: Wang Jici)

Emergence of concepts

Huge size in cluster research A1, A2
Current cluster research problem A3, A4
Difficulties in current cluster practices A9, A10, A11
7.5 Coding and Memos

7.5.1 Jingdezhen interview 1, Shaojiwu

7.5.1.1 Indicators

1. 50-60 shops
2. Businesses involved with around 200-300 people
3. 200-300 businesses
4. Businessmen own display stands rather than a shop
5. In one shop, they are not competitors, clear boundaries across different techniques
6. Clear division of labour
7. Craftsmen have their own techniques and relative relation in inheritance
8. Division of labour and expertise – with explicit geographical divisions
   a) Leping (location) – flowers and birds drawing
   b) Duchang (location) – patterns
   c) Boyang (location) - figures
9. Strong local ceramic culture that attract people switch from different community sectors
10. Low entry requirement
11. Hire different craftsmen with different expertise according to different business orders within a specific area of expertise – have a clear boundary
12. Famille rose: Buy white clay – drawing – painting – writing – blowing green colour to the bottom – firing (for smaller producers)
13. Firing could be by producer itself or bring the clay to firing technicians
14. Clear division creates supporting industries, such as clay transport industry
15. 100% family own workshops
16. Big workshops with over 100 employees, small workshops only have two people – husband and wife – still have clear division, husband draws, wife paints
17. Cut-throat competition between big producers and husband and wife shops – due to the calculation of labour cost, the later one merely count their labour cost into production
18. Duchang (Location) has bad influence on Jingdezhen porcelain industry as they do not obey the rule of doing business and being very tricky – bad reputation in trade
19. Fuzhou (Location), Boyang (Location) are better in reputation
20. Very broad connection with a group of business men
21. Porcelain types: white ware, decoration ware, sculpture, reproduction
22. Sculpture – Sculpture factory; art ware in Fanjiajing (location), applique in Guomao (Location)
23. National and international porcelain exhibition – people from countryside of Jiangxi province, bad impact on Jingdezhen porcelain, being dishonesty, lack of price stability, profit-oriented without concerning the Jingdezhen reputation as a whole, lack of quality control and grading system
24. Very big difference between white ware and art ware. There are honoured art
masters whose production worth over a hundred thousand RMB per piece – due to their fame in and outside Jingdezhen

25. Not many old porcelains remained in the market but fake production
26. If the degree of similarity goes up the price of fake production will go up too
27. Reproduction does not equal to fake
28. Fuzhou (location) is famous for its fake porcelain trade – they cheat by playing drama in front of customers to make it real enough to fool the customers
29. Trade centres and auction halls co-work with the tricky trades to bring fake production to auctions and sell for extraordinary high price as real ancient porcelain, the same in all other antique markets, such as jade and copper
30. Jinchangli (Location) – Tourist ceramic centre – a bit of everything: kitchenware, reproduction, production of famous art masters, business traders who buy porcelain from surrounding area to the tourists
31. Taocicheng (Location) – tourist ceramic centre as well
32. Great quantity of kitchenware – make profit out of the size of quantity not profit per unit – big workshops, slim profit with great quantity, but high risks too
33. Kitchenware production requires a certain amount of start-up capital and good business network for selling
34. Some local entrepreneurs merger and acquire state-own factories and their brands in kitchenware sector
35. Jingdezhen porcelain had experienced downturns, prosperities, there are ups and downs, therefore another prosperity could be expected
36. Industrial research of Jingdezhen porcelain would be quite helpful, study of its internal network and supporting industries will also be beneficial to the main industry
37. Jingdezhen survives with its porcelain industry and all the other industries are highly depends on it, such as hospitality, housing, real estate, which drives the local economy
38. Once the core industry prospers, then will be the related and supporting industries

7.5.1.2 Categories

1. Mostly very small SMEs (1.1-1.4)
2. Family business, (1.15)
3. Active cooperation between functional businesses and traders (1.5-1.14,1.20)
4. Unhealthy business environment – cut-throat competition and cheating (1.16-1.19, 1.23,1.25-29)
5. Geographical proximity of production divisions (1.21-22,1.30-31)
6. Local artists with going popularity inside and outside Jingdezhen (1.24)
7. Kitchenware with great potential of profitability and growth (1.32-34)
8. High business confidence (1.35-36)
9. Importance of Jingdezhen porcelain to its entire local economy (1.37-38)
7.5.2 Jingdezhen interview 2, Shaojiwu
7.5.2.1 Indicators

1. Family business
2. Inheritance from grandfather who is one of the most famous 33 ceramic artists from Jingdezhen ceramic research unit, specialised in Famille verte (Kangxi Wu Cai), who went to Jingdezhen for over a century
3. Father from ceramic institute, the only Famille verte heir honoured by government
4. Not all relatives in this industries
5. Relatively small in size comparing to other Chinese ceramic production centres
6. Self-produced, self-selling due to the uniqueness of Jingdezhen artistic porcelain
7. Reproduction could not have mass production
8. Small in size as well as small in market demand
9. White clay made and ordered from special workshops which are specialised in white clay production only
10. Order different shapes of white clay for reproduction of porcelain from different dynasties, or designed by themselves then filled and fired for selling
11. Very fine division of labour, as nowadays technicians and craftsmen could not handle many stages in porcelain production, then each step is now completed by one person only. Lower level of techniques while the old craftsmen could complete the work which is now completed by four people in total.
12. Impossible to complete a piece of porcelain by one person now – more cooperation between people
13. Geographical specialisation
14. At least involves 3-4 steps, and 7-8 for more complicated piece of work
15. Specialised in figure drawing, from arts factory
16. Small businesses were less impacted by global economy downturn comparing to big producers
17. Famous artists with creative masterpieces were least impacted (innovation)
18. Increase of labour cost and decrease in sales make porcelain reproduction very difficult to sustain itself
19. Sister switch from porcelain production to real estate projects in the recession
20. Porcelain techniques inheritance – restricted in families or broad family clans – (nepotism)
21. Family clans in porcelain production are easier to be impacted by economy fluctuation and switch to other industries
22. 2000-2006 is the most prosperous period for porcelain and many people from rural area come to become apprentices
23. In recession, only the ones with better techniques remained in this industry
24. Ceramic is closely related to national and global economy as the consumption of ceramic goes along with sales of real estate where people have spare room and
money for fine porcelain
25. The street is for people who understand the quality and price of reproduced porcelain, mostly are dealers who sell as second hand
26. Dealers from Beijing, Shanghai, Jiangxi, Harbin and other places (national-wide)
27. Domino effect of porcelain industry with other industries in Jingdezhen

7.5.2.2 Categories

1. Mostly very small family owned SMEs (Developed and joint with category 1-2) (1.1-1.4, 1.15, 2.1, 2.5, 2.8)
2. Active cooperation between functional businesses and traders (1.5-1.14,1.20, 2.9-10)
3. Clear division of labour (New) (2.11-12, 2.14-15)
4. Unhealthy business environment – cut-throat competition and cheating (1.16-1.19, 1.23,1.25-29)
5. Geographical proximity of production specialization (1.21-22,1.30-31, 2.13)
6. Local artists with going popularity inside and outside Jingdezhen (1.24)
7. Kitchenware with great potential of profitability and growth (1.32-34)
8. High business confidence of porcelain industry by local businessmen (1.35-36)

Less impacted by economical recession (New) (2.16) – conflicted with 2.18 – delete
9. Impacted by global economy explicitly (2.16, 2.18-19, 2.21-22)
10. Good craftsmen remained in the industry during recession and less impacted (New) (2.17, 2.23)
11. Importance of Jingdezhen porcelain to its entire local economy – Domino effect (1.37-38, 2.24,2.27)
12. Self-produced and self-selling (New) (2.6-7)
13. Nepotism (New) (2.2-4, 2.20)
14. Wholesalers terminal – Shaojiwu (location) (New) (2.25-26)

7.5.3 Jingdezhen interview 3, Shaojiwu

7.5.3.1 Indicators

1. Entrepreneurship with no relatives in this industry
2. From apprentice
3. Problem – copyright issue
4. Famous artists have their copyrights but not all artists
5. Own design: self-drawing, design patterns, renewed monthly
6. Plagiarism is an issue of Jingdezhen porcelain production
7. Different people have their own business philosophy
8. Good artists does not mean good businessmen
9. Opportunity cost of better education to have better skills in porcelain production
10. Ability is more important than degree (certificate)
11. Jingdezhen does not have a standard business operation system
12. The wholesale market and retailing market were in poor condition
13. Buy and sell for the same price, or sell at different prices with the same product (range from 100,000 RMB to 200 RMB) without business sense and management skills
14. Cheating as “kill the pig” – a common phenomenon in fake porcelain production – impact the market demand
15. No grading or pricing standard in the porcelain market – very confusing
16. Dishonesty is a big issue
17. Risk the entire ceramic market for self-interests
18. Sell the appliqué porcelain for 100 times more in retailing than wholesale price
19. Wholesale price for similar products is not constant, nor in retailing market
20. Negative attitude towards government intervention
21. Corruption is an issue, the needy might not get the suitable help
22. Negative attitude towards non-government organisations – lack of confidence
23. Stiff competition
24. Need innovation to stand out
25. Require continuous improvement in quality
26. There is a governing rule in Jingdezhen porcelain making, which is socially embedded: the bigger the easier to survive and smaller the harder to sustain
27. Some exhibitors got US passport and became more profitable when the US government raise the bar for other exhibitors to entry into the market
28. Government has its policy and business has its solution accordingly
29. To challenge and make effort is the key of success
30. Bank loan is for big companies not for new businesses (mostly)
31. Poor creditability is the main reason why the government could not issue loans to people
32. Financial crisis is a good opportunity – different perspective
33. Reserve money not for personal interests like car or housing but to keep high liquidity for everyday business operation
34. Strict quality and quantity control – with good financial management
35. Financial management is the key
36. The key of the failure of many porcelain producers is their financial management was very poor – use 70% of their profit in housing and car and shrink in size under recession – become less competitive
37. Some connection with people from hometown – only to relax
38. Connect with people with higher social status to trigger oneself to improve
39. Connect with superb experts in porcelain production to gain positive influence
40. Differences in social status, income and life style cause separation of friends – different in interests and sources of pressure
41. Use pricing strategy to relief from plagiarism and for self-protection
42. Government plan to remove the entire Shaojiwu (location) to develop its real estate industry
43. Government has inconsistent policies towards different traditional porcelain
market about relocation (Shaojiwu and Fanjiajing)
44. Centralised planning is not good for the majority of people
45. No price control in real estate for porcelain businesses by government
46. When the rent goes up, a very strange phenomenon formed as a group of people
share to share the rent of a shop rather than own their own shops by hiring the
stands
47. Maintain high level of inventory to gain competitiveness in the market

7.5.3.2 Categories

1. Mostly very small family-owned SMEs (1.1-1.4, 1.15, 2.1, 2.5, 2.8)
2. Active cooperation between functional businesses and traders (1.5-1.14,1.20,
2.9-10)
3. Clear division of labour (2.11-12, 2.14-15)
4. Unhealthy business environment – cut-throat competition, cheating and
corruption (Developed) (1.16-1.19, 1.23,1.25-29, 3.13-19, 3.23, 3.27-28)
5. Geographical proximity of production specialization (1.21-22,1.30-31, 2.13)
6. Local artists become more popular inside and outside Jingdezhen (1.24)
7. Kitchenware with great potential of profitability and growth (1.32-34)
8. High business confidence of porcelain industry by local businessmen (1.35-36)
9. Impacted by global economy explicitly (2.16, 2.18-19, 2.21-22)
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(2.17, 2.23)
11. Importance of Jingdezhen porcelain to its entire local economy – Domino effect
(1.37-38, 2.24, 2.27)
12. Self-produced and self-selling (2.6-7)
13. Nepotism (2.2-4, 2.20)
14. Apprentice without nepotism (New) (3.1-2)
15. Wholesalers terminal – Shaojiwu (location) under poor condition (Developed)
(2.25-26, 3.12)
16. Plagiarism/copyright issue – using pricing strategy (New) (3.4-6, 3.41)
17. Business philosophy (New) (3.7-10)
18. No good business operation system or standard in Jingdezhen (New) (3.11)
19. Lack of confident with external intervention by government and NGOs with
failures of government intervention in the development of porcelain industry in
Jingdezhen (New) (3.16, 3.20-22, 3.42-45)
20. One shop with many stand owners – failure of government real estate price
control for porcelain business (New) (1.1-4, 3.46)
21. Quality control (New) (3.25, 3.34)
22. Governing rule: easier to survive in big rather than small (New) (3.26-28)
23. Entrepreneurship – innovation, challenge and effort, stocking strategy (New) (3.5,
3.24, 3.29, 3.32, 3.47)
24. Financial management – external and internal factors, key factor and strategy in
competition (New) (3.30-36)

7.5.4 Coding Memo 1 – Jingdezhen interviews

I Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display (Developed, joint with category 12 and 20) (1.1-1.4, 1.15, 2.1, 2.5-8, 3.46)
2. Active cooperation between functional businesses and traders (1.5-1.14,1.20, 2.9-10)
3. Clear division of labour with high level of cooperation between divisions and with traders (Developed, joint with category 2) (1.5-1.14,1.20, 2.9-12, 2.14-15)
4. Unhealthy business environment without business norms—cut-throat competition, cheating, plagiarism, copyright issues and corruption (Developed, joint with category 17) (1.16-1.19, 1.23,1.25-29, 3.11, 3.13-19, 3.4-6, 3.23, 3.27-28, 3.41)
5. Geographical proximity of production specialization with nepotism or apprentice (1.21-22,1.30-31, 2.2-4, 2.20, 2.13, 3.1-2)
6. Masterpieces of famous artists with very high demand and very high price—strong competitive advantage (Developed) (1.24)
7. Kitchenware with great potential of profitability and growth (1.32-34)
8. Business confidence from porcelain history and strong local porcelain culture (Developed) (1.35-36)
9. Closely associated with global economy (Developed) (2.16, 2.18-19, 2.21-22)
10. Good craftsmen remained in the industry during recession and less impacted (2.17, 2.23)
11. Source of competitiveness – good techniques (quality), innovation (design) and fame (Joint with category 6, 10, 22) (1.24, 2.17, 2.23, 3.25, 3.34)
12. Importance of Jingdezhen porcelain to its local economy – Domino effect (1.37-38, 2.24,2.27)
13. Self-produced and self-selling (2.6-7)
14. Nepotism (2.2-4, 2.20)
15. Apprentice without nepotism (New) (3.1-2)
16. Wholesalers terminal—Shaojiwu (location) under poor condition (Developed) (2.25-26, 3.12)
17. Plagiarism/copyright issue—using pricing strategy (New) (3.4-6, 3.41)
18. Business philosophy (New) (3.7-10)
19. No good business operation system or standard in Jingdezhen (New) (3.11)
20. Failures of government intervention in relocating wholesalers market, real estate, and rental price control (Developed and joint with category 16) (2.25-26, 3.12, 3.16, 3.20-22, 3.42-45)
21. One shop with many stand owners—failure of government real estate price
control for porcelain business (New) (1.1-4, 3.46)
22. Quality control (New) (2.25-3.34)
23. Governing rule: easier to survive in big rather than small – capital economy (Developed) (3.26-28)
24. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy (Developed, joint with category 17) (3.5, 3.7-10, 3.4-6, 3.24, 3.29, 3.32, 3.41, 3.47)
25. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition (Developed) (3.30-36)

Categories (After resort)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display (1.1-1.4, 1.15, 2.1, 2.5-8, 3.46)
2. Clear division of labour with high level of cooperation between divisions and with traders (1.5-1.14,1.20, 2.9-12, 2.14-15)
3. Unhealthy business environment without business norms – cut-throat competition, cheating, plagiarism, copyright issues and corruption (1.16-1.19, 1.23,1.25-29, 3.11, 3.13-19, 3.4-6, 3.23, 3.27-28, 3.41)
4. Geographical proximity of production specialization with nepotism or apprentice (1.21-22,1.30-31, 2.2-4, 2.20, 2.13, 3.1-2)
5. Kitchenware with great potential of profitability and growth (1.32-34)
6. Business confidence from porcelain history and strong local porcelain culture (1.35-36)
7. Closely associated with global economy (2.16, 2.18-19, 2.21-22)
8. Source of competitiveness – good techniques (quality), innovation (design) and fame (1.24, 2.17, 2.23, 3.25, 3.34)
9. Importance of Jingdezhen porcelain to its local economy – Domino effect (1.37-38, 2.24,2.27)
12. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy (3.5, 3.7-10, 3.4-6, 3.24, 3.29, 3.32, 3.41, 3.47)
13. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition (3.30-36)

II Possible relevant field of literature accordingly

1. SMEs
2. Cluster networks
3. Cluster external business environment
4. Geographical proximity with special employment relation – nepotism or apprentice
5. Emerging sectors from traditional industry/cluster
6. Business confidence
7. Macro-environment – global economy to local industries
8. Source of competitiveness, competitive advantage
9. Backbone industry and local economy
10. External intervention and the development of clusters
11. Capital economy
12. Entrepreneurship
13. Financial management
14. Cluster and internal business network

7.5.5 Beijing interview 1
7.5.5.1 Indicators

1. World biggest cluster research population
2. Hard to calculate actual number of researchers
3. A great scale of academia
4. Research in cluster in China
5. Use overseas literatures
6. Too many literatures
7. Use overseas literature
8. Use overseas literature into Cluster Research
9. Early stage
10. Theory application
11. Not generating new theories
12. Emphasis contemporary development of clusters
13. Focus on its problems and upgrading methods
15. New perspectives
16. Evolving Economic Geography or Evolving Economics
17. Helpful
18. Cluster research
19. Define Chinese industrial cluster
20. Different from innovative clusters
21. Labour-intensive cluster
22. No cooperation
23. Negative competition
24. Instability
25. Many survival clusters
26. Has no difference with historical clusters
27. Has no difference with other developing countries
28. No necessary competitive
29. Traditional cultural cluster examples
30. Research on village special cultural industrial zone
31. Industrialization phenomenon
32. Non-industrialization possibility
33. Experience exchange
34. Economic function of traditional cultural cluster
35. Trademark of traditional products
36. Highlight of Tourism
37. Trademarks of traditional products - missing out
38. Feature of traditional industries
39. Traditional products samples
40. Restore traditional cultural products
41. Successful cluster with successful enterprise samples
42. Cluster environment
43. Supporting firms
44. Competition
45. Strong business association
46. R&D centre
47. Successful cluster examples
48. Supporting firms
49. Strong business association
50. Core enterprises lead business association
51. Training institutions
52. Professional markets of raw material supply
53. Problem worth explore in professional market
54. Government support
55. Good business environment - Strong government planned economy
56. Bad business environment - The importance of the role of government
57. Entrepreneurs - Attracting investment
58. Able to enter domestic and foreign markets and ability of anti-dumpling
59. Cultural differences, government in China has a greater function
60. The ability of Chinese government

7.5.5.2 Categories

1. Great number of researchers 1.1-3
2. Premature research 1.4-9, 1.46
3. Focus on problem-solving of clusters 1.10-12
4. New research area 1.13-14
5. Chinese clusters are surviving clusters 1.15
6. Negative competition 1.23
7. Traditional cluster and product samples 1.24-25, 1.35
8. Traditional cluster research in village 1.26-30
9. Traditional trademarks with tourism 1.31-33
10. Miss out of features in traditional cluster 1.34
11. Should restore tradition 1.37
12. Strong business association support 1.40, 1.43
13. Training institution 1.44
14. Professional market 1.45
15. The importance of government support 1.47-49
16. Entrepreneurs 1.50
17. Cluster ability 1.51
18. Culture differences in government function 1.52-53

7.5.6 Beijing interview 2
7.5.6.1 Indicators

1. The development of cluster research is from Porter M and Marshall A
2. Chinese cluster has its own features
3. Cluster phenomena in China due to the industrial transformation of overseas countries that they remove their production lines to China for cheaper labour costs, cheaper rent/land, and close to raw materials – clustering to reduce costs
4. Innovation is not the key driver of Chinese cluster
5. Local entrepreneurs and overseas investors are the two group of people who drive cluster formation
6. Two factors of cluster formation: international value chain (produce for export) and local entrepreneurship (overseas investors and local businessmen)
7. Current cluster research associates with regional or district development, especially in China lead or organised by government
8. Researchers conduct research for central or local governments
9. Path-interdependent – Krugman, relevant to local culture and tradition
10. Two triggers to form clusters: influences from overseas investors to do FDI, second is based on Chinese traditional culture like Jingdezhen
11. District economy development depends on very strong culture background
12. Culture is a very important element to influence contemporary industrial clusters
13. Research on traditional cultural clusters will benefit the research of Chinese industrial cluster research
14. Chinese industrial clusters are lack of competitiveness
15. Culture is a source to add value to products
16. Local-embedded – culture network
17. Confucian in Chinese culture
18. Cluster has its life circle and might transformed
19. Local business atmosphere is also very important – the spirit of innovation, and risk-taking
20. Innovation to make improvement is much worthy than innovation to change
something entirely (Schumpeter)
21. Not all culture elements are useful in innovation
22. Innovation could be the process and design
23. Jingdezhen is far behind other ceramic centres (Foshan 佛山) in terms of technology, value-added, industrial size, design

7.5.6.2 Categories

1. Features of Chinese Cluster Research - Great number of researchers and premature research focusing on problem-solving (Developed, joint with category 1,2,3) (1.1-3, 1.4-9, 1.10-12, 1.46)
2. Premature research
3. Focus on problem-solving of clusters
4. Cluster research is a new research area in China (Developed) (1.13-14)
5. Feature of Chinese clusters – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, lack of competitiveness (Developed) (1.15, 2.2-4)
6. Negative competition 1.23
7. Traditional cluster and product samples 1.24-25, 1.35
8. Traditional cluster research in village 1.26-30
9. Traditional trademarks with tourism 1.31-33
10. Miss out of features in traditional cluster 1.34
11. The importance of traditional culture and traditional clusters in clustering - source of innovation (Developed, joint with category 7-10) (1.24-35, 1.37, 2.9-13, 2.15, 2.17)
12. Constructive innovation (New) (2.20-22)
13. Strong business association support 1.40, 1.43
14. Training institution 1.44
15. Professional market 1.45
16. The importance of government support 1.47-49
17. Entrepreneurs – drive cluster formation, local entrepreneurs (Developed) (1.50, 2.5)
18. Two factors of cluster formation: exporting and entrepreneurship (New) (2.6)
19. Cluster ability 1.51
20. Differences in government functions internationally – Chinese government intervenes to plan cluster formation (Developed) (1,46-49, 1.52-53, 2.7-8)
21. Key cluster theorists – Porter, Marshall, Krugman and Schumpeter (New) (2.1,
22. Networking – path interdependent, local embedded and cultural network (New) (2.9, 2.16)
23. Cluster life cycle and transformation (New) (2.18)
25. Jingdezhen is far behind other ceramic centres in terms of technology, value-added, industrial size, design (New) (2.23)
7.5.7 Beijing interview 3
7.5.7.1 Indicators

1. A huge group of cluster researchers in China from geography, management and economics
2. Culture differences between Eastern and Western – exploring the uniqueness of Chinese clusters
3. Lack of literature and in-depth communication
4. Increase in production costs, labour costs, land costs reduce the competitiveness of Chinese clusters
5. Culture could help to upgrade value-added of products
6. Exploring traditional cultural clusters about their operation and technique is very important
7. Industrial transformation and cluster incubation – right timing and opportunities are very important
8. Opportunity is unique existing a particular period of time, there will always have new opportunities, but different from previous
9. Historical background is very important for cluster incubation
10. Good and supporting business environment or atmosphere (Shenzhen) – governing system, good developing pace, good production and marketing positioning – through interviewing some local entrepreneurs
11. Spirit of entrepreneurship
12. Chinese clusters are mostly promoted by central or local governments originally, unlike overseas clusters (clusters formed in 1980s)
13. Geographical proximity – Shenzhen and HongKong
14. The contribution of Chinese cluster research is based on awareness and understanding of overseas researches – how Chinese clusters challenges current cluster research
15. Study Chinese phenomena should embedded in local culture and local features
16. Current advantages of Chinese clusters are mostly low costs advantages
17. R&D and design of big companies are mostly located overseas, not in China

7.5.7.2 Categories

1. Features of Chinese Cluster Research - Great number of researchers and premature research focusing on problem-solving, new research area (Joint with category 2) (1.1-3, 1.4-9, 1.10-14, 1.46, 3.1)
2. Cluster research is a new research area in China (1.13-14)
3. Feature of Chinese clusters – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, lack of competitiveness (1.15, 2.2-4, 3.2, 3.4, 3.16)
4. Negative competition 1.23
5. The importance of traditional culture and traditional clusters in clustering - source of innovation (1.24-35, 1.37, 2.9-13, 2.15, 2.17, 3.5-6, 3.15)
6. Innovation – should be constructive, most of innovative activities of MNEs are carried out overseas, not in China (Developed) (2.20-22, 3.17)
7. Strong business association support 1.40, 1.43
8. Training institution 1.44
9. Professional market 1.45
10. Entrepreneurs – drive cluster formation, local entrepreneurs (1.50, 2.5, 3.11)
11. Two factors of cluster formation: exporting and entrepreneurship (2.6)
12. Cluster ability 1.51
13. Differences in government functions internationally – Chinese government intervenes to plan cluster formation (1,46-49, 1.52-53, 2.7-8, 3.12)
14. Importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research (2.1, 3.3, 3.14)
15. Networking – path interdependent, local embedded and cultural network (2.9, 2.16)
16. Cluster life cycle and transformation (2.18)
17. Business environment – atmosphere with spirit of innovation and risk-taking (2.19, 3.10)
18. Jingdezhen is far behind other ceramic centres in terms of technology, value-added, industrial size, design (2.23)
19. Historical opportunities and cluster incubation (New)(2.6-9)
20. Geography proximity (New) (2.13)

7.5.8 Coding Memo 1 – Beijing interviews

I Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)
1. Features of Chinese Cluster Research - Great number of researchers and premature research focusing on problem-solving, new research area (1.1-3, 1.4-9, 1.10-14, 1.46, 3.1)
2. Feature of Chinese clusters – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, innovative activities mostly carried out overseas by MNEs, lack of competitiveness (Developed and joint with category 5) (1.15, 2.2-4, 3.2, 3.4, 2.20-22, 3.16-17)
3. Negative competition 1.23
4. The importance of traditional culture and traditional clusters in clustering - source of innovation, problems of traditional clusters – lack of competitiveness (technology, design and production size) (Developed and joint with category 17) (1.24-35, 1.37, 2.9-13, 2.15, 2.17, 2.23, 3.5-6, 3.15)
5. Innovation – should be constructive, most of innovative activities of MNEs are carried out overseas, not in China (Developed) (2.20-22, 3.17)
6. Strong business association support (1.40, 1.43)
7. Training institution (1.44)
8. Professional market (1.45)
9. Entrepreneurs – drive cluster formation, local entrepreneurs (1.50, 2.5, 3.11)
10. Two factors of cluster formation: exporting and entrepreneurship (2.6)
11. Cluster ability 1.51
12. Chinese government intervenes to plan cluster formation (Developed) (1.46-49, 1.52-53, 2.7-8, 3.12)
13. Importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research (2.1, 3.3, 3.14)
14. Business environment and networking – path interdependent, local embedded and cultural network, business association, professional market, spirit of innovation and risk-taking (Developed and joint with category 3, 6-8, 16) (1.40, 1.43-45, 2.9, 2.16, 2.19, 3.10)
15. Cluster life cycle and transformation (2.18)
16. Business environment – atmosphere with spirit of innovation and risk-taking (2.19, 3.10)
17. Jingdezhen is far behind other ceramic centres in terms of technology, value added, industrial size, design (2.23)
18. Historical opportunities and cluster incubation (2.6-9)
19. Factors in breeding clusters – historical opportunities (right time), geography proximity, international business activities (exporting) and local entrepreneurship (Developed and joint with category 10, 18, 20) (2.6-9, 2.13)
20. Geography proximity (2.13)

Categories (After resort)
1. Features of Chinese Cluster Research - Great number of researchers and premature research focusing on problem-solving, new research area (1.1-3, 1.4-9, 1.10-14, 1.46, 3.1)
2. Feature of Chinese clusters – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, innovative activities mostly carried out overseas by MNEs, lack of competitiveness (1.15, 2.2-4, 3.2, 3.4, 2.20-22, 3.16-17)
3. The importance of traditional culture and traditional clusters in clustering - source of innovation, problems of traditional clusters – lack of competitiveness (technology, design and production size) (1.24-35, 1.37, 2.9-13, 2.15, 2.17,, 2.23, 3.5-6, 3.15)
4. Entrepreneurs – drive cluster formation, local entrepreneurs (1.50, 2.5, 3.11)
5. Chinese government intervenes to plan cluster formation (1.46-49, 1.52-53, 2.7-8, 3.12)
6. Importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research (2.1, 3.3, 3.14)
7. Business environment and networking – path interdependent, local embedded and cultural network, training institution, business association, professional market, spirit of innovation and risk-taking (1.40, 1.43-45, 2.9, 2.16, 2.19, 3.10)
8. Cluster life cycle and transformation (2.18)
9. Important factors in breeding clusters – historical opportunities (right time), geography proximity, international business activities (exporting) and local entrepreneurship (2.6-9, 2.13)

II Possible relevant field of literature accordingly
1. Chinese Cluster Research
2. Chinese contemporary clusters
3. Chinese traditional clusters
4. Entrepreneurs
5. The role of government in clustering
6. Literature review of cluster theories – to find research gap
7. Business environment and networking
8. Cluster life cycle and cluster development
9. Cluster incubation

7.5.9 Field Note 1: Beijing
7.5.9.1 Indicators
1. Antiques and new ware from Jingdezhen in Panjiayuan
2. Collector use microscope to exam the ware
3. The antique market in China is a mess now
4. Could not really tell the difference between antique and fake porcelain – even specialists
5. Jingdezhen has a very broad variety of ceramic productions
6. Reproduction porcelain are not fake
7. Huge difference in porcelain prices – without pricing regulations

7.5.9.2 Categories
1. Jingdezhen has a broad variety of porcelain (1.1, 1.5)
2. There are some equipment available to exam antique porcelain (1.2)
3. The market is a mess - Hard to distinguish real antique and fake even experts, without pricing standards and regulations (1.3-4, 1.6-7)
4. Hard to distinguish and define reproduction from fake (1.4)
7.5.10 Field Note 2: Jingdezhen

7.5.10.1 Indicators

1. Shangjiwu and Fanjiajing are centres for reproduction of ancient porcelain
2. Mostly family businesses - no state-owned businesses at all
3. Couple shops – co-working between husband and wife
4. Clear division of labour in porcelain production – differences in techniques and types of drawing
5. Close cooperation between functional businesses and traders, very few could manage all production procedures by their own
6. Clear division of specialisation within Jingdezhen ceramic market – reproduction, daily kitchenware, masterpieces of famous artists
7. Impact of global financial crisis – hard to survive, local economy depressed
8. Most consumers of high quality reproduction are from overseas, the financial crisis is not just inside the USA
9. Financial crisis is an opportunities for good craftsmen

7.5.10.2 Categories

1. Jingdezhen has a broad variety of porcelain with clear divisions of different porcelain wares (Developed) (1.1, 1.5, 2.1, 2.6)
2. There are some equipment available to exam antique porcelain (1.2)
3. The market is a mess - Hard to distinguish real antique and fake even experts, without pricing standards and regulations (Developed and joint with category 4) (1.3-4, 1.6-7)
4. Hard to distinguish and define reproduction from fake (1.4)
5. Mostly family-owned SMEs (New) (2.2-3)
6. Clear division of labour (New) (2.4)
7. Close business network between core industry with supporting industries (New) (2.5)
8. Close relationship between Jingdezhen porcelain industry with global economy (2.7-9)

7.5.11 Field Note 3: Jingdezhen

7.5.11.1 Indicators

1. Ancient kiln ceramic factory – ran by some private craftsmen
2. Jingdezhen used to have many clans and regional labour unions since Qing Dynasty
3. No close relationship with countrymen now
4. Countrymen become competitors
5. Countrymen contacts only exists in small groups not as a whole
7.5.11.2 Categories

1. Jingdezhen has a broad variety of porcelain with clear divisions of different porcelain wares (1.1, 1.5, 2.1, 2.6)
2. There are some equipment available to exam antique porcelain (1.2)
3. The market is a mess - Hard to distinguish real antique and fake even experts, without pricing standards and regulations (1.3-4, 1.6-7)
4. Mostly family-owned SMEs (2.2-3, 3.1)
5. Clear division of labour (2.4)
6. Close business network between core industry with supporting industries (2.5)
7. Close relationship between Jingdezhen porcelain industry with global economy (2.7-9)
8. Clanship and regional country unions used to occupy one or some production procedures to maintain the operation of porcelain production in Jingdezhen (New) (3.2)
9. Now countrymen became competitors and have contacts only within small groups (New) (3.3-3.5)

7.5.12 Coding Memo 1 – Field Notes

I Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)

1. Geographical proximity of different types of ceramic markets (Developed) (1.1, 1.5, 2.1, 2.6)
2. There are some equipment available to exam antique porcelain (1.2)
3. The market is a mess - Hard to distinguish real antique and fake even experts with equipments, without pricing standards and regulations (Developed and joint with category 2) (1.2-4, 1.6-7)
4. Mostly family-owned SMEs (2.2-3, 3.1)
5. Clear division of labour (2.4)
6. Close business network between core industry with supporting industries (2.5)
7. Close relationship between Jingdezhen porcelain industry with global economy (2.7-9)
8. Clanship and regional country unions used to occupy one or some production procedures to maintain the operation of porcelain production in Jingdezhen (New) (3.2)
9. Now countrymen became competitors and have contacts only within small groups (New) (3.3-3.5)
10. Transformation of business networks – used to be controlled by clans and regional labour unions in different steps of porcelain production and trade,
diminishing in countrymen network and become competitions, free market formed (New, joint with category 8-9) (3.2-3.5)

Categories (After resort)
1. Geographical proximity of different types of ceramic markets (1.1, 1.5, 2.1, 2.6)
2. The market is a mess - Hard to distinguish real antique and fake even experts with equipments, without pricing standards and regulations (1.2-4, 1.6-7)
3. Mostly family-owned SMEs (2.2-3, 3.1)
4. Clear division of labour (2.4)
5. Close business network between core industry with supporting industries (2.5)
6. Close relationship between Jingdezhen porcelain industry with global economy (2.7-9)
7. Transformation of business networks – used to be controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in countrymen network and become competitions, free market formed (3.2-3.5)

II Possible relevant field of literature accordingly
1. Geographical proximity
2. Market regulation
3. SMEs in clustering
4. Clear division of labour - specialisation
5. Cluster external network
6. Macro-environment and clusters
7. Transformation of cluster internal networks

7.5.13 Coding Memo 2 – Jingdezhen interviews

I Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit (Developed)
2. Clear division of labour with high level of cooperation between divisions and with traders
3. Unhealthy business environment without business norms– cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and
improve in quality in order to avoid plagiarism, copyright issues and corruption (Developed)

4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, clear division of expertise according to place of origin (Developed)

5. Daily ware with great potential of profitability and growth (Developed)

6. Business confidence from porcelain history and strong local porcelain culture

7. Closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, no as good as before (early 2000s) (Developed)

8. Source of competitiveness – good techniques (quality), innovation (design) and fame

9. Importance of Jingdezhen porcelain to its local economy – Domino effect

10. Failures of government intervention in relocating wholesalers market, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen (Developed and joint with category 17)

11. Capital economy - easier to survive in big rather than small (Developed)

12. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

13. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

14. Dynamic of business network – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries – different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists (Developed)

15. Working population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates (New)

16. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas (New)

17. Collapse of state-own factories which is mostly specialized in daily ware (New)

Categories (After resort)

1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop, unlike production chain in big organisations to produce standardized products while some SMEs have
production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit

2. Clear division of labour with high level of cooperation between divisions and with traders

3. Unhealthy business environment without business norms– cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption

4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, clear division of expertise according to place of origin

5. Daily ware with great potential of profitability and growth

6. Business confidence from porcelain history and strong local porcelain culture

7. Closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, no as good as before (early 2000s)

8. Source of competitiveness – good techniques (quality), innovation (design) and fame

9. Importance of Jingdezhen porcelain to its local economy – Domino effect

10. Failures of government intervention in relocating wholesalers market, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen

11. Capital economy - easier to survive in big rather than small

12. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

13. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

14. Dynamic of business network – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries – different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists

15. Working population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates

16. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas
II Possible relevant field of literature accordingly
1. SMEs
2. Cluster networks
3. Cluster external business environment
4. Geographical proximity with special employment relation – nepotism or apprentice
5. Emerging sectors from traditional industry/cluster
6. Business confidence
7. Macro-environment – global economy to local industries
8. Source of competitiveness, competitive advantage
9. Backbone industry and local economy
10. External intervention and the development of clusters
11. Capital economy
12. Entrepreneurship
13. Financial management
14. Cluster and internal business network
15. Working population
16. Retailing network

7.5.14 Coding Memo 3 – Jingdezhen interviews

I Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit
2. Clear division of labour with high level of cooperation between divisions and with traders
3. Unhealthy business environment without business norms – cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption
4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, clear division of expertise according to place of origin
5. Daily ware with great potential of profitability and growth
6. Business confidence from porcelain history and strong local porcelain culture, improve in one or two years (Developed)
7. Closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis (Developed)

8. Source of competitiveness – good techniques (quality), innovation (design) and fame

9. Importance of Jingdezhen porcelain to its local economy – Domino effect

10. Failures of government intervention in relocating wholesalers market, real estate, and rental price control, collapse of state-owned factories – a big loss of Jingdezhen

11. Capital economy - easier to survive in big rather than small

12. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

13. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

14. Dynamic of business network – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries – different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists

15. Working population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-owned factories (Developed)

16. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas

17. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features) (New)

18. China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Gurangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels (New)

19. Jinxiuchangnan – decorative porcelains and tourists’ porcelains (New)

Categories (After resort)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit

2. Clear division of labour with high level of cooperation between divisions and with traders

3. Unhealthy business environment without business norms – cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption

4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, clear division of expertise according to place of origin

5. Daily ware with great potential of profitability and growth

6. Business confidence from porcelain history and strong local porcelain culture, improve in one or two years

7. Closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis

8. Source of competitiveness – good techniques (quality), innovation (design) and fame

9. Importance of Jingdezhen porcelain to its local economy – Domino effect

10. Failures of government intervention in relocating wholesalers market, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen

11. Capital economy - easier to survive in big rather than small

12. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

13. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

14. Dynamic of business network – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries – different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists

15. Working population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-own factories
16. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas.

17. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features)

18. China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels.


II Possible relevant field of literature accordingly
1. SMEs
2. Cluster networks
3. Cluster external business environment
4. Geographical proximity with special employment relation – nepotism or apprentice
5. Emerging sectors from traditional industry/cluster
6. Business confidence
7. Macro-environment – global economy to local industries
8. Source of competitiveness, competitive advantage
9. Backbone industry and local economy
10. External intervention and the development of clusters
11. Capital economy
12. Entrepreneurship
13. Financial management
14. Cluster and internal business network
15. Working population
16. Retailing network
17. The four features of Jingdezhen porcelain
18. China porcelain town – targeting tourists with porcelain from Chaozhou

7.5.15 Coding Memo 4 – Jingdezhen interviews

I Re-arrange categories
Categories (Constant comparison and resort, theoretical and selective coding)

1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit (Developed)

2. Clear division of labour with high level of cooperation between divisions and with traders

3. Unhealthy business environment without business norms – cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption

4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carvings, Leping specialized in flowers and birds drawing, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism (Developed)

5. Daily ware with great potential of profitability and growth

6. Business confidence from porcelain history and strong local porcelain culture, improve in one or two years

7. Closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis

8. Source of competitiveness – good techniques (quality), innovation (design) and fame

9. Importance of Jingdezhen porcelain to its local economy – Domino effect

10. Failures of government intervention in relocating wholesalers market, real estate, and rental price control, collapse of state-owned factories – a big loss of Jingdezhen

11. Capital economy – easier to survive in big rather than small

12. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

13. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

14. Dynamic of cluster internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network
with supporting industries such as: white clay, pens, glaze, colour, firing, porcelain transportation…; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists (Developed)

15. Working population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-own factories

16. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas

17. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features)

18. China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels

19. Jinxuuchangnan – decorative porcelains and tourists’ porcelains

20. History of Jingdezhen porcelain – early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handicrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs, Jingdezhen started to reemphasis handicrafts rather than industrial productions, by upgrading handicrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition (New, by Lili Fang joint with category 11)

21. Directions of Jingdezhen porcelain development – famous artists with their artworks, Tourism, industries, porcelain design, no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate (New, by Lili Fang)

22. Tradition means handicrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handicrafts, tradition could be the production procedures and the products come out can be modern (New)

23. Relevant groups to Jingdezhen cluster – government as the policy maker leads the
development of porcelain industry, most important is the market demand (New)

24. Competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo (New)

25. Development of Fanjiajing – in 1993, there is no many shops in Fanjiajing, half private houses and half shops and workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, although the rental price increase 20 folds, but people still unwilling to move out of the market (New)

26. Development of the market demand and supply: more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers, market formed itself naturally, but price for fine porcelain is very bad (New)

Categories (After resort)

1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit (Developed)

2. Clear division of labour with high level of cooperation between divisions and with traders

3. Unhealthy business environment without business norms– cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption

4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism

5. Daily ware with great potential of profitability and growth

6. Business confidence from porcelain history and strong local porcelain culture, improve in one or two years
7. Closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis
8. Source of competitiveness – good techniques (quality), innovation (design) and fame
9. Importance of Jingdezhen porcelain to its local economy – Domino effect
10. Failures of government intervention in relocating wholesalers market, real estate, and rental price control, collapse of state-owned factories – a big loss of Jingdezhen
11. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy
12. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition
13. Dynamic of cluster internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour, firing, porcelain transportation...; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists
14. Working population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-owned factories
15. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas
16. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features)
17. China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels
18. Jinxiuchangnan – decorative porcelains and tourists’ porcelains
19. History of Jingdezhen porcelain – early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a
connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handcrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs, Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition

20. Directions of Jingdezhen porcelain development – famous artists with their artworks, Tourism, industries, porcelain design, no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate

21. Tradition means handcrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handcrafts, tradition could be the production procedures and the products come out can be modern

22. Relevant groups to Jingdezhen cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand

23. Competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo

24. Development of Fanjiajing – in 1993, there is no many shops in Fanjiajing, half private houses and half shops and workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, although the rental price increase 20 folds, but people still unwilling to move out of the market

25. Development of the market demand and supply: more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers, market formed itself naturally, but price for fine porcelain is very bad

II Possible relevant field of literature accordingly

1. SMEs
2. Cluster networks
3. Cluster external business environment
4. Geographical proximity with special employment relation – nepotism or apprentice
5. Emerging sectors from traditional industry/cluster
6. Business confidence
7. Macro-environment – global economy to local industries
8. Source of competitiveness, competitive advantage
9. Backbone industry and local economy
10. External intervention and the development of clusters
11. Entrepreneurship
12. Financial management
13. Cluster and internal business network
14. Working population
15. Retailing network
16. The four features of Jingdezhen porcelain
17. China porcelain town – targeting tourists with porcelain from Chaozhou
18. Jinxiuchangnan – decorative porcelains and tourists’ porcelains
19. History of Jingdezhen porcelain
20. Directions of Jingdezhen porcelain development
21. Tradition
22. Relevant groups to Jingdezhen cluster
23. Competitors of Jingdezhen porcelain clusters in China
24. Development of Fanjiajing
25. Development of the market demand and supply

7.5.16 Coding Memo 5 – Jingdezhen interviews

I Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit (Developed)
2. Clear division of labour with high level of cooperation between divisions and with traders
3. Unhealthy business environment without business norms– cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption, collapsed of state-own factories lead to stiff competition in porcelain market as most of them remained in the market with new craftsmen from outside Jingdezhen, get into negative cycle of competition with blind price-cutting which leads to closing downs – at the end the businesses getting smaller without capital to employ beyond family members (Developed)
4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen,
Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism

5. Daily ware with great potential of profitability and growth
6. Business confidence from porcelain history and strong local porcelain culture, improve in one or two years
7. Closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis
8. Source of competitiveness – good techniques (quality), innovation (design) and fame
9. The copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists – a big problem stopping the development of reproduction (New)
10. Importance of Jingdezhen porcelain to its local economy – Domino effect
11. Creditability of government shaken by fail in intervening in relocating wholesalers markets and move out dangerous gas kilns from Fanjiajing – treat different traditional markets differently by comparing Fanjiajing and Shaojiwu, government failed to intervene three times in Jingdezhen as the village people are very tricky who paid the elders to stop the crowd to move the kilns, cause huge financial loses of general businessmen who took government’s word into account at first, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen (Developed)
12. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy
13. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition
14. Dynamic of cluster internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour, firing, porcelain transportation…; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists
15. Working reproduction population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-own factories, playing cards as a phenomenon very common relax in Jingdezhen porcelain market, considered to have no influence to businesses due to the high level of specialization and uniqueness of each business, only one or two shops produce the same pattern or
technique, high mobility of craftsmen – stay and return only when porcelain is making profit, people with little literacy went overseas to run porcelain exhibition – cause major political issue by talking to Fanlungong practitioners in New Zealand, poorer in salary even the best craftsmen (Developed)

16. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas

17. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features)

18. China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels

19. Jinxichangnan – decorative porcelains and tourists’ porcelains

20. History of Jingdezhen porcelain – early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handcrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs (where the confidence come from), Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition (Developed and joint with category 6)

21. Directions of Jingdezhen porcelain development – famous artists with their artworks, Tourism, industries, porcelain design, and daily ware; no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate (Developed and joint with category 5)

22. Tradition means handcrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handcrafts, tradition could be the production procedures and the products come out can be modern

23. Relevant groups to Jingdezhen cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters – 2000 RMB per month, (Developed)

24. Competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo
25. Development of Fanjiajing – in 1992, there is no many shops in Fanjiajing, half private houses and half workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, the rental price increase 10-20 folds (some said three folds) for the last fifteen to ten years, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, but people still unwilling to move out of the market, still has 20-30 kilns, the landlords here prospered and increase rental prices even in economy downturns once to four times per year, now with 2000 businesses in Jingdezhen (2008), get famous and with over fifteen year in history, influencing Guomao, Jinchangli as they linked together in line, very narrow streets that cars could not enter (Developed)

26. Development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers – order from some identical workshops – small in size, market formed itself naturally, but price for fine porcelain is very bad, the size of businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only 1/2 as before whereas the cost and profit is one to one before, market demand become more sophisticated than before market downturn from year 2007 (Developed)

27. Blue-and-white production – normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains (New)

28. Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing – only 700 degrees (New)

29. Guomao – contemporary decorative porcelains, and appliqué porcelains which is far cheaper than handcrafts (New)

30. Liandshebeilu – famous artists’ showrooms (New)

31. Xindu – decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot (New)

32. Jinchangli – daily ware, famous artists’ artworks, reproduction – a bit of everything (New)

33. Exhibitions – get all sorts of porcelain according to preliminary study of a city or district (New)

34. Xinchang – with private workshops and kilns (New)

35. Famous artists and their artworks – mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from porcelain institutes, combining different arts elements into porcelain production, such as
traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen (New)

**Categories (After resort)**

1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit

2. Clear division of labour with high level of cooperation between divisions and with traders

3. Unhealthy business environment without business norms– cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption, collapsed of state-own factories lead to stiff competition in porcelain market as most of them remained in the market with new craftsmen from outside Jingdezhen, get into negative cycle of competition with blind price-cutting which leads to closing downs – at the end the businesses getting smaller without capital to employ beyond family members

4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism

5. Closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis

6. Source of competitiveness – good techniques (quality), innovation (design) and fame

7. The copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists – a big problem stopping the development of reproduction

8. Importance of Jingdezhen porcelain to its local economy – Domino effect

9. Creditability of government shaken by fail in intervening in relocating wholesalers markets and move out dangerous gas kilns from Fanjiajing – treat different traditional markets differently by comparing Fanjiajing and Shaojiwu,
government failed to intervene three times in Jingdezhen as the village people are very tricky who paid the elders to stop the crowd to move the kilns, cause huge financial loses of general businessmen who took government’s word into account at first, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen

10. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

11. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

12. Dynamic of cluster internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour, firing, porcelain transportation….; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists

13. Working reproduction population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-own factories, playing cards as a phenomenon very common relax in Jingdezhen porcelain market, considered to have no influence to businesses due to the high level of specialization and uniqueness of each business, only one or two shops produce the same pattern or technique, high mobility of craftsmen – stay and return only when porcelain is making profit, people with little literacy went overseas to run porcelain exhibition – cause major political issue by talking to Fanlungong practitioners in New Zealand, poorer in salary even the best craftsmen

14. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas

15. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features)

16. China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10- 25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels
17. Jinxiuchangnan – decorative porcelains and tourists’ porcelains

18. History of Jingdezhen porcelain – early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handcrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs (where the confidence come from), Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition

19. Directions of Jingdezhen porcelain development – famous artists with their artworks, Tourism, industries, porcelain design, and daily ware; no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate

20. Tradition means handcrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handcrafts, tradition could be the production procedures and the products come out can be modern

21. Relevant groups to Jingdezhen cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters – 2000 RMB per month

22. Competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo

23. Development of Fanjiajing – in 1992, there is no many shops in Fanjiajing, half private houses and half workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, the rental price increase 10-20 folds (some said three folds) for the last fifteen to ten years, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, but people still unwilling to move out of the market, still has 20-30 kilns, the landlords here prospered and increase rental prices even in economy downturns once to four times per year, now with 2000 businesses in Jingdezhen (2008), get famous and with over fifteen year in history, influencing Guomao, Jinchangli as they linked together in line, very narrow streets that cars could not enter

24. Development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers – order from some identical workshops – small in size, market formed itself naturally, but price for fine porcelain is very bad, the size of businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only
1/2 as before whereas the cost and profit is one to one before, market demand become more sophisticated than before market downturn from year 2007

25. Blue-and-white production – normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains

26. Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing – only 700 degrees

27. Guomao – contemporary decorative porcelains, and appliqué porcelains which is far cheaper than handcrafts

28. Lianshebeilu – famous artists’ showrooms

29. Xindu – decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot

30. Jinchangli – daily ware, famous artists’ artworks, reproduction – a bit of everything

31. Exhibitions – get all sorts of porcelain according to preliminary study of a city or district

32. Xinchang – with private workshops and kilns

33. Famous artists and their artworks – mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from porcelain institutes, combining different arts elements into porcelain production, such as traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen

II Possible relevant field of literature accordingly

1. SMEs
2. Cluster networks
3. Cluster external business environment
4. Geographical proximity with special employment relation – nepotism or apprentice
5. Macro-environment – global economy to local industries
6. Source of competitiveness, competitive advantage
7. Backbone industry and local economy
8. External intervention and the development of clusters
9. Entrepreneurship
10. Financial management
11. Cluster and internal business network
12. Working population
13. Retailing network
14. The four features of Jingdezhen porcelain
15. China porcelain town – targeting tourists with porcelain from Chaozhou
16. Jinxichangnan – decorative porcelains and tourists’ porcelains
17. History of Jingdezhen porcelain
18. Directions of Jingdezhen porcelain development
19. Tradition
20. Relevant groups to Jingdezhen cluster
21. Competitors of Jingdezhen porcelain clusters in China
22. Development of Fanjiajing
23. Development of the market demand and supply
24. Development of the market demand and supply
25. Blue-and-white production
26. Under-glazed
27. Guomao
28. Lianshebeilu
29. Xindu
30. Jinchangli
31. Exhibitions
32. Xinchang
33. Famous artists and their artworks

7.5.17 Coding Memo 6 – Jingdezhen interviews

I Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit, in 2007 it is hard to make profit even at the salary of a good craftsman (Developed)
2. Clear division of labour with high level of cooperation between divisions and with traders
3. Unhealthy business environment without business norms– cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption, collapsed of state-own factories lead to stiff competition in porcelain market as most of them remained in the market with new craftsmen from outside Jingdezhen, get into negative cycle of competition with blind price-cutting which leads to closing downs – at the end the businesses getting smaller without capital to employ beyond family members
4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing
businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, Fuzhou and Duchang – boxes making, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism

5. Market economy which closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis (Developed)

6. Source of competitiveness – good techniques (quality), innovation (design) – is the only way of surviving in economic down-turn, and fame (Developed)

7. The copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists – a big problem stopping the development of reproduction, about 10% of the reproduction craftsmen with innovative spirit did not receive encouragement

8. Importance of Jingdezhen porcelain to its local economy – Domino effect

9. Creditability of government shaken by fail in intervening in relocating wholesalers markets and move out dangerous gas kilns from Fanjiajing – treat different traditional markets differently by comparing Fanjiajing and Shaojiwu, government failed to intervene three times in Jingdezhen as the village people are very tricky who paid the elders to stop the crowd to move the kilns, cause huge financial loses of general businessmen who took government’s word into account at first, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen

10. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

11. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

12. Dynamic of cluster internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour, firing, wrapping and boxes, porcelain transportation...; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists, unity of people from the same village, supporting industries were affecting significantly by porcelain industry, e.g. kiln owners, box makers, Importance of Jingdezhen porcelain to its local economy – Domino effect (Developed and joint with category 8)

13. Working reproduction population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-own factories, playing cards as a phenomenon very common relax in Jingdezhen porcelain market, considered to
have no influence to businesses due to the high level of specialization and uniqueness of each business, only one or two shops produce the same pattern or technique, high mobility of craftsmen – stay and return only when porcelain is making profit, people with little literacy went overseas to run porcelain exhibition – cause major political issue by talking to Fanlungong practitioners in New Zealand, poorer in salary even the best craftsmen, rent out farm ground and paid for people work on the ground – government policy on land regulation, unsecure labour contract with half employees with part-time positions, might damage country image sometimes of misbehaviour (Developed)

14. Branding of Jingdezhen porcelain industry (New)
15. Porcelain industry production management – human resource management and knowledge and expertise in entire production procedure are valued equally – hard to find good managers (New)
16. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas
17. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features)
18. China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels, with design problem (Developed)
19. Jinxichangnan – decorative porcelains and tourists’ porcelains
20. History of Jingdezhen porcelain – early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handcrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs (where the confidence come from), Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition
21. Directions of Jingdezhen porcelain development – famous artists with their artworks, Tourism, industries, porcelain design, and daily ware; no mass production but extremely fine porcelains in order to save Jingdezhen and solve
the problem of high unemployment rate

22. Tradition means handcrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handcrafts, tradition could be the production procedures and the products come out can be modern

23. Relevant groups to Jingdezhen cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters – 2000 RMB per month

24. Competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo

25. Development of Fanjiajing – in 1992, there is no many shops in Fanjiajing, half private houses and half workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, the rental price increase 10-20 folds (some said three folds) for the last fifteen to ten years, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, but people still unwilling to move out of the market, still has 20-30 kilns, the landlords here prospered and increase rental prices even in economy downturns once to four times per year, now with 2000 businesses in Jingdezhen (2008), get famous and with over fifteen year in history, influencing Guomao, Jinchangli as they linked together in line, very narrow streets that cars could not enter

26. Development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers – order from some identical workshops – small in size, market formed itself naturally, but price for fine porcelain is very bad, the size of businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only 1/2 as before whereas the cost and profit is one to one before, market demand become more sophisticated than before market downturn from year 2007, 2008 is the worst in ten years time, customers aim for cheaper and better porcelains, overseas artists and businesses came to seek new business opportunities to combine the traditional design and techniques with new design concepts by creating new shape, use of monocle, crackle, etc. (Developed)

27. Blue-and-white production – normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains

28. Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing – only 700 degrees

29. Guomao – contemporary decorative porcelains, and appliqué porcelains which is far cheaper than handcrafts, gain profit from quantity, now over 70% of buyers go to Guomao for sourcing and 30% to Fanjiajing and duplicated 10% for other
types of porcelain, the window of Jingdezhen (Developed)

30. Lianshebeilu – famous artists’ showrooms

31. Xindu – decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot, with constructive design problem (Developed)

32. Jinchangli – daily ware, famous artists’ artworks, reproduction – a bit of everything

33. Exhibitions – get all sorts of porcelain according to preliminary study of a city or district

34. Xinchang – with private workshops and kilns (Developed)

35. Laochang – mostly casting porcelain (New)

36. Famous artists and their artworks – mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from porcelain institutes, combining different arts elements into porcelain production, such as traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen

37. Convenience in transportation with good location is the key for emerging porcelain markets – proofed by success in Fanjiajing, Guomao, Jinchangli which is at town centre and clear to railway station, bus station and accommodations; while Xindu, China porcelain town and Jinxiuchangnan is not as good (New)

Categories (After resort)

1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit, in 2007 it is hard to make profit even at the salary of a good craftsman

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2. Cluster networks
3. Cluster external business environment
4. Geographical proximity with special employment relation – nepotism or apprentice
5. Market economy
6. Source of competitiveness
7. Copyright issue
8. External intervention
9. Entrepreneurship
10. Financial management
11. Cluster and internal business network
12. Working population
13. Branding of porcelain industry
14. Retailing network
15. The four features of Jingdezhen porcelain
16. China porcelain town – targeting tourists with porcelain from Chaozhou
17. Jinxiuchangnan – decorative porcelains and tourists’ porcelains
18. History of Jingdezhen porcelain
19. Directions of Jingdezhen porcelain development
20. Tradition
21. Relevant groups to Jingdezhen cluster
22. Competitors of Jingdezhen porcelain clusters in China
23. Development of Fanjiajing
24. Development of the market demand and supply
25. Development of the market demand and supply
26. Blue-and-white production
27. Under-glazed
28. Guomao
29. Lianshebeilu
30. Xindu
31. Jinchangli
32. Exhibitions
33. Xinchang
34. Laochang
35. Famous artists and their artworks
36. Factors in market emerging - convenience in transportation with good location

7.5.18 Coding Memo 7 – Jingdezhen interviews

I Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit, in 2007 it is hard to make profit even at the salary of a good craftsman
2. Clear division of labour with high level of cooperation between divisions and with traders
3. Unhealthy business environment without business norms – cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption, collapsed of state-owned factories lead to stiff competition in porcelain market as most of them remained in the market with new craftsmen from outside Jingdezhen, get into negative cycle of competition with blind price-cutting which leads to closing downs – at the end the businesses getting smaller without capital to employ beyond family members
4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, Fuzhou and Duchang – boxes making, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism.

5. Market economy which closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis.

6. Source of competitiveness – good techniques (quality), innovation (design) – is the only way of surviving in economic down-turn, and fame.

7. The copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists – a big problem stopping the development of reproduction, about 10% of the reproduction craftsmen with innovative spirit did not receive encouragement.

8. Creditability of government shaken by fail in intervening in relocating wholesalers markets and move out dangerous gas kilns from Fanjiajing – treat different traditional markets differently by comparing Fanjiajing and Shaojiwu, government failed to intervene three times in Jingdezhen as the village people are very tricky who paid the elders to stop the crowd to move the kilns, cause huge financial loses of general businessmen who took government’s word into account at first, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen, government should communicate with the public and porcelain producers (Developed).


10. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition.

11. Dynamic of cluster internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour (revival of colour and chemical industry with revival of porcelain, some colour formula is not available to the public but only within a family, especially in famille rose colours), firing, wrapping and boxes, porcelain transportation...; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists, unity of people from the same village, supporting industries were affecting significantly by porcelain industry, e.g. kiln owners, box makers, Importance of Jingdezhen porcelain to its local economy – Domino effect (Developed).

12. Working reproduction population features - Graduates from local porcelain
institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-owned factories, playing cards as a phenomenon very common relax in Jingdezhen porcelain market, considered to have no influence to businesses due to the high level of specialization and uniqueness of each business, only one or two shops produce the same pattern or technique, high mobility of craftsmen – stay and return only when porcelain is making profit, people with little literacy went overseas to run porcelain exhibition – cause major political issue by talking to Fanlungong practitioners in New Zealand, poorer in salary even the best craftsmen, rent out farm ground and paid for people work on the ground – government policy on land regulation, unsecure labour contract with half employees with part-time positions, might damage country image sometimes of misbehaviour

13. Branding of Jingdezhen porcelain industry – gain popularity through outlets in other cities or other countries and draw customers to Jingdezhen, good city image, an international famous brand, impacted by price competition in the retailing market, and ceramic from Jiangsu and Chaozhou pretended to be Jingdezhen porcelain – lower the overall quality image of Jingdezhen ware (Developed)

14. Porcelain industry production management – human resource management and knowledge and expertise in entire production procedure are valued equally – hard to find good managers

15. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas, many dealers have rich experiences in holding exhibitions around China and some around the world. High mobility – without an idea of settle down in one place mostly, price reduced when more people get into porcelain retailing market, Jingdezhen porcelain is available everywhere in China through the dealers, purchase all production of one kiln – to become an exclusive agent, no standard sourcing channels, but open to the entire porcelain market according to demand in different regions, able to make phone call to order – familiar with patterns and features of each shop, sensitive to market demand in different cities, go to Jingdezhen regularly to get updates in market information and looking for new products, 70-80% of stock is daily ware with 10-20% of reproduction normally, market saturated, more supply than demand, cooperation between friends from the same village or relatives to open a shop outside Jingdezhen, sometimes have to send children back to home town for education, mostly bring along; built new houses in home town first and then consider other places – as a norm, some buy houses in Jingdezhen, reproduction sell as real antique – cheating along with experts through bribery (make up to hundred folds profit sometimes) – some put into prison for this reason, buy antique for very low price and sell high, most of the porcelain in auction houses are real stuff - with notarization, sell a variety of porcelain no just Jingdezhen ware but also porcelain from Zhejiang, without stamp as the customer could not believe that they are empire ware (Developed)
16. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features)

17. China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels, with design problem

18. Jinxuichangnan – decorative porcelains and tourists’ porcelains

19. History of Jingdezhen porcelain – early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handicrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs (where the confidence come from), Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition

20. Directions of Jingdezhen porcelain development – famous artists with their artworks, Tourism, industries, porcelain design, and daily ware; no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate

21. Tradition means handcrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handcrafts, tradition could be the production procedures and the products come out can be modern

22. Relevant groups to Jingdezhen cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters – 2000 RMB per month

23. Competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo

24. Development of Fanjiajing – in 1992, there is no many shops in Fanjiajing, half private houses and half workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, the rental price increase 10-20 folds (some said three folds) for the last fifteen to ten years, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental
price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, but people still unwilling to move out of the market, still has 20-30 kilns, the landlords here prospered and increase rental prices even in economy downturns once to four times per year, now with 2000 businesses in Jingdezhen (2008), get famous and with over fifteen year in history, influencing Guomao, Jinchangli as they linked together in line, very narrow streets that cars could not enter

25. Development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers – order from some identical workshops – small in size, market formed itself naturally, but price for fine porcelain is very bad, the size of businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only 1/2 as before whereas the cost and profit is one to one before, market demand become more sophisticated than before market downturn from year 2007, 2008 is the worst in ten years time, customers aim for cheaper and better porcelains, overseas artists and businesses came to seek new business opportunities to combine the traditional design and techniques with new design concepts by creating new shape, use of monocle, crackle, etc., overseas buyers (foreigners not overseas Chinese) looking for more contemporary and straight porcelain (Developed)

26. Blue-and-white production – normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains

27. Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing – only 700 degrees

28. Guomao – contemporary decorative porcelains, and appliqué porcelains which is far cheaper than handcrafts, gain profit from quantity, now over 70% of buyers go to Guomao for sourcing and 30% to Fanjiajing and duplicated 10% for other types of porcelain, the window of Jingdezhen

29. Lianshebeilu – famous artists’ showrooms

30. Xindu – decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot, with constructive design problem

31. Jinchangli – daily ware, famous artists’ artworks, reproduction – a bit of everything

32. Exhibitions – get all sorts of porcelain according to preliminary study of a city or district

33. Xinchang – with private workshops and kilns

34. Laochang – mostly casting porcelain

35. Famous artists and their artworks – mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from porcelain institutes, combining different arts elements into porcelain production, such as
traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen, could not support the entire porcelain industry as no helping the job market, some artworks of famous artists are actually produced by their fellow students, no by themselves (Developed)

36. Convenience in transportation with good location is the key for emerging porcelain markets – proofed by success in Fanjiajing, Guomao, Jinchangli which is at town centre and clear to railway station, bus station and accommodations; while Xindu, China porcelain town and Jinxiuchangnan is not as good

37. People from Fuzhou occupied 50% of total Jingdezhen population in such as porcelain production, architecture, restaurants, clothing, fruit selling, nearly every business sector (New)

Categories (After resort)
1. Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit, in 2007 it is hard to make profit even at the salary of a good craftsman
2. Clear division of labour with high level of cooperation between divisions and with traders
3. Unhealthy business environment without business norms– cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption, collapsed of state-own factories lead to stiff competition in porcelain market as most of them remained in the market with new craftsmen from outside Jingdezhen, get into negative cycle of competition with blind price-cutting which leads to closing downs – at the end the businesses getting smaller without capital to employ beyond family members
4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, Fuzhou and Duchang – boxes making, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism
5. Market economy which closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as
6. Source of competitiveness – good techniques (quality), innovation (design) – is the only way of surviving in economic down-turn, and fame

7. The copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists – a big problem stopping the development of reproduction, about 10% of the reproduction craftsmen with innovative spirit did not receive encouragement

8. Creditability of government shaken by fail in intervening in relocating wholesalers markets and move out dangerous gas kilns from Fanjiajing – treat different traditional markets differently by comparing Fanjiajing and Shaojiwu, government failed to intervene three times in Jingdezhen as the village people are very tricky who paid the elders to stop the crowd to move the kilns, cause huge financial loses of general businessmen who took government’s word into account at first, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen, government should communicate with the public and porcelain producers

9. Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

10. Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

11. Dynamic of cluster internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour (revival of colour and chemical industry with revival of porcelain, some colour formula is not available to the public but only within a family, especially in famille rose colours) , firing, wrapping and boxes, porcelain transportation…; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists, unity of people from the same village, supporting industries were affecting significantly by porcelain industry, e.g. kiln owners, box makers, Importance of Jingdezhen porcelain to its local economy – Domino effect

12. Working reproduction population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-own factories, playing cards as a phenomenon very common relax in Jingdezhen porcelain market, considered to have no influence to businesses due to the high level of specialization and uniqueness of each business, only one or two shops produce the same pattern or technique, high mobility of craftsmen – stay and return only when porcelain is making profit, people with little literacy went overseas to run porcelain exhibition – cause major political issue by talking to Fanlungong practitioners in New Zealand, poorer in salary even the best craftsmen, rent out farm ground and paid for people work on the ground – government policy on land regulation, unsecure
labour contract with half employees with part-time positions, might damage country image sometimes of misbehaviour

13. Branding of Jingdezhen porcelain industry – gain popularity through outlets in other cities or other countries and draw customers to Jingdezhen, good city image, an international famous brand, impacted by price competition in the retailing market, and ceramic from Jiangsu and Chaozhou pretended to be Jingdezhen porcelain – lower the overall quality image of Jingdezhen ware

14. Porcelain industry production management – human resource management and knowledge and expertise in entire production procedure are valued equally – hard to find good managers

15. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas, many dealers have rich experiences in holding exhibitions around China and some around the world. High mobility – without an idea of settle down in one place mostly, price reduced when more people get into porcelain retailing market, Jingdezhen porcelain is available everywhere in China through the dealers, purchase all production of one kiln – to become an exclusive agent, no standard sourcing channels, but open to the entire porcelain market according to demand in different regions, able to make phone call to order – familiar with patterns and features of each shop, sensitive to market demand in different cities, go to Jingdezhen regularly to get updates in market information and looking for new products, 70-80% of stock is daily ware with 10-20% of reproduction normally, market saturated, more supply than demand, cooperation between friends from the same village or relatives to open a shop outside Jingdezhen, sometimes have to send children back to home town for education, mostly bring along; built new houses in home town first and then consider other places – as a norm, some buy houses in Jingdezhen, reproduction sell as real antique – cheating along with experts through bribery (make up to hundred folds profit sometimes) – some put into prison for this reason, buy antique for very low price and sell high, most of the porcelain in auction houses are real stuff - with notarization, sell a variety of porcelain no just Jingdezhen ware but also porcelain from Zhejiang, without stamp as the customer could not believe that they are empire ware (Developed)

16. The four features of Jingdezhen porcelain: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – Ling lung ware; Sculpture factory – sculpture ware (in addition to the four features)

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decorative porcelain, a variety of different types of porcelain at different price levels, with design problem

18. Jinxiuchangnan – decorative porcelains and tourists’ porcelains

19. History of Jingdezhen porcelain – early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handcrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs (where the confidence come from), Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition

20. Directions of Jingdezhen porcelain development – famous artists with their artworks, Tourism, industries, porcelain design, and daily ware; no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate

21. Tradition means handcrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handcrafts, tradition could be the production procedures and the products come out can be modern

22. Relevant groups to Jingdezhen cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters – 2000 RMB per month

23. Competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo

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25. Development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers – order from some identical workshops – small in size, market formed itself naturally, but price for
fine porcelain is very bad, the size of businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only 1/2 as before whereas the cost and profit is one to one before, market demand become more sophisticated than before market downturn from year 2007, 2008 is the worst in ten years time, customers aim for cheaper and better porcelains, overseas artists and businesses came to seek new business opportunities to combine the traditional design and techniques with new design concepts by creating new shape, use of monocle, crackle, etc., overseas buyers (foreigners not overseas Chinese) looking for more contemporary and straight porcelain

26. Blue-and-white production – normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains

27. Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing – only 700 degrees

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29. Lianshebeilu – famous artists’ showrooms

30. Xindu – decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot, with constructive design problem

31. Jinchangli – daily ware, famous artists’ artworks, reproduction – a bit of everything

32. Exhibitions – get all sorts of porcelain according to preliminary study of a city or district

33. Xinchang – with private workshops and kilns

34. Laochang – mostly casting porcelain

35. Famous artists and their artworks – mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from porcelain institutes, combining different arts elements into porcelain production, such as traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen, could not support the entire porcelain industry as no helping the job market, some artworks of famous artists are actually produced by their fellow students, no by themselves

36. Convenience in transportation with good location is the key for emerging porcelain markets – proofed by success in Fanjiajing, Guomao, Jinchangli which is at town centre and clear to railway station, bus station and accommodations; while Xindu, China porcelain town and Jinxiuchangnan is not as good

37. People from Fuzhou occupied 50% of total Jingdezhen population in such as porcelain production, architecture, restaurants, clothing, fruit selling, nearly every business sector
II Possible relevant field of literature accordingly

1. SMEs
2. Cluster networks
3. Cluster external business environment
4. Geographical proximity with special employment relation – nepotism or apprentice
5. Market economy
6. Source of competitiveness
7. Copyright issue
8. External intervention
9. Entrepreneurship
10. Financial management
11. Cluster and internal business network
12. Working population
13. Retailing network
14. Branding of porcelain industry
15. The four features of Jingdezhen porcelain
16. China porcelain town – targeting tourists with porcelain from Chaozhou
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29. Lianshebeilu
30. Xindu
31. Jinchangli
32. Exhibitions
33. Xinchang
34. Laochang
35. Famous artists and their artworks
36. Factors in market emerging - convenience in transportation with good location
37. Fuzhou people in Jingdezhen

7.5.19 Coding Memo 2 – Beijing interviews

I Re-arrange categories
Categories (Constant comparison and resort, theoretical and selective coding)

1. Features of Chinese Cluster Research – Great number of researchers and premature research focusing on problem-solving, new research area, crisis in research development, with great potential (Developed)
2. Feature of Chinese clusters – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, innovative activities mostly carried out overseas by MNEs, lack of competitiveness, geography proximity with clear regional features, regional divisions in production chain (Developed)
3. Traditional culture – source of innovation and design elements, history of continuous innovation, might just be a symbol without its original functions – cause confusion and difficulties to revive traditional industries (Developed)
4. Problems of traditional clusters – lack of competitiveness in terms of technology, design and production size (New and developed from category 3)
5. Entrepreneurship – drive cluster formation, local entrepreneurs
6. Chinese government intervenes to plan cluster incubation – successful clusters with less government intervention (Developed)
7. Importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research, from management, economics, geography, sociology fields (Developed)
8. Business environment – training institution, professional market, spirit of innovation and risk-taking, globalization of production network with positive impact, internationally active academic support and expertise, compete with a huge group of clusters from within China, and from overseas, like Taiwan, Korea, Japan, Italy, Netherland, with advanced technology and level of industrialization (New and developed from category 9)
9. Networking – path interdependent, local embedded, cultural network, business association, (Developed)
10. Cluster life cycle and transformation of Jingdezhen porcelain – Functional transformation of ceramic (original functions disappeared, aesthetic appreciation, distance from daily life, fine ware with very limited number of consumers, channels of transformation - e.g. architecture. Require open-minded) (New)
11. Important factors in breeding clusters – historical opportunities (right time), geography proximity, international business activities (exporting) and local entrepreneurship, less government intervention in start-up phrase lead to succeed in electronic and IT industries, globalisation (Developed and joint with category 5)
12. Labour-intensive clusters – solved the problem of employing manpower from countryside at a transition stage of economic development in China, huge amount of closing downs under financial crisis (due to new labour law with base salary regulation, raise of raw material prices, increase in production costs, appreciation of RMB, depreciation of USD which is the currency used in international trade) (New)
13. Industrialization and upgrading – satisfy the majority first, the hierarchy of
consumption, different positions in value chain, customer segmentation, threat and opportunity for traditional cluster to upgrade (e.g. silk production in Jiangsu and Zhejiang), start from small industry with clear and very focused specialisation – e.g. TV into broad complicated electronic cluster (New)

14. Innovation – even traditional cluster need continuous innovation and creativity to gain the market share (experience from successful ceramic cluster in Taiwan), to make good connection with contemporary design elements in order to satisfy customer needs better (New)

15. Research potentials in Jingdezhen – business network with overseas markets, relationship between overseas designers and Jingdezhen porcelain, apprentice system, countrypmen-ship. New areas in Jingdezhen porcelain production, why Jingdezhen was so successful and what are the causation of poor condition right now, touch knowledge, the relevance between culture and the original drive of cluster incubation, sales network, market operation, how to revive traditional crafts (New, and go back to previous Beijing interviews to collect more information)

Categories (After resort)
1. Features of Chinese Cluster Research – Great number of researchers and premature research focusing on problem-solving, new research area, crisis in research development, with great potential
2. Feature of Chinese clusters – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, innovative activities mostly carried out overseas by MNEs, lack of competitiveness, geography proximity with clear regional features, regional divisions in production chain
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4. Problems of traditional clusters – lack of competitiveness in terms of technology, design and production size
5. Entrepreneurship – drive cluster formation, local entrepreneurs
6. Importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research, from management, economics, geography, sociology fields
7. Business environment – training institution, professional market, spirit of innovation and risk-taking, globalization of production network with positive impact, internationally active academic support and expertise, compete with a huge group of clusters from within China, and from overseas, like Taiwan, Korea, Japan, Italy, Netherland, with advanced technology and level of industrialization
8. Networking – path interdependent, local embedded, cultural network, business association
9. Cluster life cycle and transformation of Jingdezhen porcelain – Functional transformation of ceramic (original functions disappeared, aesthetic appreciation,
distance from daily life, fine ware with very limited number of consumers, channels of transformation - e.g. architecture. Require open-minded)

10. Important factors in breeding clusters – historical opportunities (right time), geography proximity, international business activities (exporting) and local entrepreneurship, less government intervention in start-up phrase lead to succeed in electronic and IT industries, globalisation

11. Labour-intensive clusters – solved the problem of employing manpower from countryside at a transition stage of economic development in China, huge amount of closing downs under financial crisis (due to new labour law with base salary regulation, raise of raw material prices, increase in production costs, appreciation of RMB, depreciation of USD which is the currency used in international trade)

12. Industrialization and upgrading – satisfy the majority first, the hierarchy of consumption, different positions in value chain, customer segmentation, threat and opportunity for traditional cluster to upgrade (e.g. silk production in Jiangsu and Zhejiang), start from small industry with clear and very focused specialisation – e.g. TV into broad complicated electronic cluster

13. Innovation – even traditional cluster need continuous innovation and creativity to gain the market share (experience from successful ceramic cluster in Taiwan), to make good connection with contemporary design elements in order to satisfy customer needs better

14. Research potentials in Jingdezhen – business network with overseas markets, relationship between overseas designers and Jingdezhen porcelain, apprentice system, countrymen-ship. New areas in Jingdezhen porcelain production, why Jingdezhen was so successful and what are the causation of poor condition right now, touch knowledge, the relevance between culture and the original drive of cluster incubation, sales network, market operation, how to revive traditional crafts

II Possible relevant field of literature accordingly (Developed)

1. Chinese Cluster Research
2. Chinese clusters
3. Traditional culture
4. Competitive advantages
5. Entrepreneurs
6. Classical cluster literatures – to find research gap
7. Business environment
8. Networking
9. Cluster life cycle and transformation
10. Cluster incubation
11. Labour-intensive clusters
12. Industrialization and upgrading
13. Innovation
14. Research potentials in Jingdezhen
7.5.20 Coding Memo 2 – Field Notes

I. Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)

1. Geographical proximity – different types of ceramic have their markets; and production proximity of different types of ceramic - Blue-and white, over-glazed famille rose by local, Korean type by Fuzhou, etc.; market proximity and lead to geographical differences in rental prices - Fanjiajing 200 RMB/m², China Porcelain Town 80 RMB/m² (Developed and joint with category 13, 15)

2. The market is a mess - Hard to distinguish real antique and fake even experts with equipments, without pricing standards and regulations

3. Mostly family-owned SMEs

4. Clear division of labour

5. Close business network between core industry with supporting industries

6. Close relationship between Jingdezhen porcelain industry with global economy

7. Transformation of business networks – used to be controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in countrymen network and become competitions, free market formed

8. Business sizes in Jingdezhen ceramic industry – 46 big companies, 400 medium size businesses, 2400 private workshops, in total 2846 businesses – 2800 SMEs, over 98% with 80 thousand practitioners, 203 gas kilns (official data, Jingdezhen annual report, 2006); Fanjiajing has 1500-2000 private businesses with only 500 shops (market data, 2008) (New)

9. 3rd International Ceramic Expo – 618 participants, 3200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas (New)

10. Year 2001 only arts factory make profit, and the rest nine state-owned factories suffered from deficit, Year 2003 government started to deploy people from state-own factories and closed down factories – directly caused by new mayor who didn’t have knowledge about porcelain, however since 1993 most of the state-own factories stopped production and in 1995, there were private workshops running in the state-own factories, in year 1996 to 1997, many workers deployed without social welfare security (New)

11. Porcelain industry absorb the unemployed population in Jingdezhen to get a second career, employed relatives, friends, people from other places as well (New)

12. Clear division of labour in production (New)

13. Geographical proximity in different types of porcelain production: Blue and white, over-glazed famille rose by local, Korean type by Fuzhou, etc. (New)

14. No rent monitoring system – no formal rental contract, no paper work, only oral contract, increase rent twice or four times (New)

15. Geography proximity – reflecting in rental price differences – Fanjiajing 200 RMB/m², China Porcelain Town 80 RMB/m² (New)
Categories (After resort)

1. Geographical proximity – different types of ceramic have their markets; and production proximity of different types of ceramic - Blue-and white, over-glazed famille rose by local, Korean type by Fuzhou, etc.; market proximity and lead to geographical differences in rental prices - Fanjiajing 200 RMB/m², China Porcelain Town 80 RMB/m², Xinmindu 4-5 RMB/m² (Developed)
2. The market is a mess - Hard to distinguish real antique and fake even experts with equipments, without pricing standards and regulations
3. Mostly family-owned SMEs
4. Clear division of labour
5. Close business network between core industry with supporting industries
6. Close relationship between Jingdezhen porcelain industry with global economy
7. Transformation of business networks – used to be controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in countrymen network and become competitions, free market formed
8. Business sizes in Jingdezhen ceramic industry– 46 big companies, 400 medium size businesses, 2400 private workshops, in total 2846 businesses – 2800 SMEs, over 98% with 80 thousand practitioners, 203 gas kilns (official data. Jingdezhen annual report, 2006); Fanjiajing has 1500-2000 private businesses with only 500 shops (market data, 2008)
9. 3rd International Ceramic Expo – 618 participants, 3200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas
10. Year 2001 only arts factory make profit, and the rest nine state-owned factories suffered from deficit, Year 2003 government started to deploy people from state-own factories and closed down factories – directly caused by new mayor who didn’t have knowledge about porcelain, however since 1993 most of the state-own factories stopped production and in 1995, there were private workshops running in the state-own factories, in year 1996 to 1997, many workers deployed without social welfare security
11. Porcelain industry absorb the unemployed population in Jingdezhen to get a second career, employed relatives, friends, people from other places as well
12. Clear division of labour in production
13. No rent monitoring system – no formal rental contract, no paper work, only oral contract, increase rent twice or four times

II Possible relevant field of literature accordingly

8. Geographical proximity
9. Market regulation
10. SMEs in clustering
11. Clear division of labour - specialisation
12. Cluster external network
13. Macro-environment and clusters
14. Transformation of cluster internal networks
15. 98% of businesses are SMEs, and in total there is 2846 porcelain businesses, whereas Fanjiajing has 1500-2000 private businesses and there is a doubt of accuracy of official figure
16. Good opportunity to generate investment through international ceramic expo
17. State-owned factories experienced down turn since 1995 and deployed the majority of workers in 1996-1997, in 2001 most of them collapsed
18. Contribution of porcelain industry in Jingdezhen – absorb the unemployed to make a living
19. Clear division of labour in production
20. Poor rental system – without paper work and unpredictable

7.5.21 Coding Memo 3 – Field Notes

I. Re-arrange categories

Categories (Constant comparison and resort, theoretical and selective coding)
1. Geographical proximity – different types of ceramic have their markets; and production proximity of different types of ceramic - Blue-and white, over-glazed famille rose by local, Korean type by Fuzhou, etc.; market proximity and lead to geographical differences in rental prices - Fanjiajing 200 RMB/m², China Porcelain Town 80 RMB/m²
2. The market is a mess - Hard to distinguish real antique and fake even experts with equipments, without pricing standards and regulations
3. Mostly family-owned SMEs
4. Clear division of labour in production (Developed and joint with category 12)
5. Business network – close business network between core industry with supporting industries, network transformation from controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in countrymen network and become competitions, free market formed (Developed and joint with category 7)
6. Close relationship between Jingdezhen porcelain industry with global economy - 3rd International Ceramic Expo – 618 participants, 3200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas (Developed and joint with category 9)
7. Transformation of business networks – used to be controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in countrymen network and become competitions, free market formed
8. Business sizes in Jingdezhen ceramic industry – 46 big companies, 400 medium size businesses, 2400 private workshops, in total 2846 businesses – 2800 SMEs, over 98% with 80 thousand practitioners, 203 gas kilns (official data, Jingdezhen annual report, 2006); Fanjiajing has 1500-2000 private businesses with only 500 shops (market data, 2008)
9. 3rd International Ceramic Expo—618 participants, 3,200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas.

10. Year 2001 only arts factory make profit, and the rest nine state-owned factories suffered from deficit. Year 2003 government started to deploy people from state-owned factories and closed down factories—directly caused by new mayor who didn’t have knowledge about porcelain, however since 1993 most of the state-owned factories stopped production and in 1995, there were private workshops running in the state-owned factories, in year 1996 to 1997, many workers deployed without social welfare security.

11. Porcelain industry absorb the unemployed population in Jingdezhen to get a second career, employed relatives, friends, people from other places as well.


13. No rent monitoring system—no formal rental contract, no paper work, only oral contract, increase rent twice or four times.


15. The failure state-owned factories—no incentive system, poor management, regardless of how much work done by individuals, in 2000, 11 out of 13 factories suffered from deficit, the worst among them are the daily ware producers (New).


17. After the state-owned factories collapsed, private enterprises rent the factories for production, the number of employees private enterprises hired is about 70% the size of previous status, and these SMEs started to buy government social welfare for employees (New).

18. Xindu—most of the businesses here have their own complete production chain—require about 8-10 for the entire chain, some part time and some full time employees, 100 properties was rent out and 100 properties purchased by businesses, original from Shaojiwu, Laochang and Fanjiajing, good for workshops not for retailing—to far from town centre and inconvenient (New).


21. Fanjiajing—market began from 1987, assessable from Internet now, the earliest buyers are from Fujian Putian, strong village protectionism—hard to survive without porcelain, unity to against external forces to disperse the market biggest porcelain market (New and joint with category 8).

22. Jingdezhen is a new industrial city since 1950s by transforming porcelain production from hand-made porcelain to have machine production, there were only 121 enterprises (New).

23. Transformation of the porcelain production chain—1050s starts industrialization,
1990s state-owned collapsed due to poor human resource and production management provide no social welfare security to people deployed; the number of SMEs then grown and occupied 98% of total businesses now which helps the unemployment and give social welfares to employees (New and joint with category 3, 8, 10, 11, 15, 17, and 22)

**Categories (After resort)**

1. Geographical proximity – different types of ceramic have their markets; and production proximity of different types of ceramic - Blue-and-white, over-glazed famille rose by local, Korean type by Fuzhou, etc.; market proximity and lead to geographical differences in rental prices - Fanjiajing 200 RMB/m², China Porcelain Town 80 RMB/m²

2. The market is a mess - Hard to distinguish real antique and fake even experts with equipments, without pricing standards and regulations

3. Clear division of labour in production

4. Business network – close business network between core industry with supporting industries, network transformation from controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in countrymen network and become competitions, free market formed

5. Close relationship between Jingdezhen porcelain industry with global economy - 3rd International Ceramic Expo – 618 participants, 3200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas

6. No rent monitoring system – no formal rental contract, no paper work, only oral contract, increase rent twice or four times

7. Innovation – could not go out of tradition


9. Xindu – most of the businesses here have their own complete production chain – require about 8-10 for the entire chain, some part time and some full time employees, 100 properties was rent out and 100 propertied purchased by businesses, original from Shaojiwu, Laochang and Fanjiajing, good for workshops not for retailing – to far from town centre and inconvenient

10. Generally poor education background of reproduction sector businessmen and craftsmen

11. Huge gap between prices of famous artists’ artworks with reproduction porcelain

12. Fanjiajing – market began from 1987, assessable from Internet now, the earliest buyers are from Fujian Putian, strong village protectionism – hard to survive without porcelain, unity to against external forces to disperse the market, biggest porcelain market

13. Transformation of the porcelain production chain – 1050s starts industrialization, 1990s state-owned collapsed due to poor human resource and production
management provide no social welfare security to people deployed; the number of SMEs then grown and occupied 98% of total businesses now which helps the unemployment and give social welfares to employees

II Possible relevant field of literature accordingly
1. Geographical proximity
2. The market is a mess
3. Clear division of labour in production
4. Business network
5. Close relationship with global economy
6. No rent monitoring system
7. Innovation
8. Divisions of ten state-owned factories
9. Xindu – most of the businesses here have their own complete production chain
10. Generally poor education background of reproduction sector businessmen and craftsmen
11. Huge gap between prices of famous artists’ artworks with reproduction porcelain
12. Fanjiajing – the biggest reproduction market
13. Transformation of the porcelain production chain – from state-own factories to SMEs

7.6 Mapping and netting the key findings

Categories (Constant comparison and resort, theoretical and selective coding between final memos of Jingdezhen interviews, Beijing interview and field notes)
1. Important business concepts in Jingdezhen clusters (Developed and joint with Categories 6, 9, 10, 13, 14, 42, 49 and 50)
   a) SMEs - Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit, in 2007 it is hard to make profit even at the salary of a good craftsman
   b) Competitiveness – good techniques (quality), innovation (design) – is the only way of surviving in economic down-turn, and fame
   c) Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy, drive cluster formation, local entrepreneurs
d) Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition
e) Porcelain industry production management – human resource management and knowledge and expertise in entire production procedure are valued equally – hard to find good managers
f) Industrialization and upgrading – satisfy the majority first, the hierarchy of consumption, different positions in value chain, customer segmentation, threat and opportunity for traditional cluster to upgrade (e.g. silk production in Jiangsu and Zhejiang), start from small industry with clear and very focused specialisation – e.g. TV into broad complicated electronic cluster; functional transformation of ceramic (original functions disappeared, aesthetic appreciation, distance from daily life, fine ware with very limited number of consumers, channels of transformation - e.g. architecture. Require open-minded) (Developed and combined with Category 46)
g) Innovation – even traditional cluster need continuous innovation and creativity to gain the market share (experience from successful ceramic cluster in Taiwan), to make good connection with contemporary design elements in order to satisfy customer needs better; could not go out of tradition (Developed and joint with Category 58)
h) Branding of Jingdezhen porcelain industry – gain popularity through outlets in other cities or other countries and draw customers to Jingdezhen, good city image, an international famous brand, impacted by price competition in the retailing market, and ceramic from Jiangsu and Chaozhou pretended to be Jingdezhen porcelain – lower the overall quality image of Jingdezhen ware

2. Clear division of labour with high level of cooperation between divisions and with traders in production (Developed and joint with Category 54)

3. External business environment – cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption, collapsed of state-own factories lead to stiff competition in porcelain market as most of them remained in the market with new craftsmen from outside Jingdezhen, get into negative cycle of competition with blind price-cutting which leads to closing downs – at the end the businesses getting smaller without capital to employ beyond family members; (theory) business environment – training institution, professional market, spirit of innovation and risk-taking, globalization of production network with positive impact, internationally active academic support and expertise, compete with a huge group of clusters from within China, and from overseas, like Taiwan, Korea, Japan, Italy, Netherland, with advanced technology and level of industrialization; competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo; development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers – order from some identical workshops – small in size, market formed itself naturally, but price for fine porcelain is very bad, the size of
businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only 1/2 as before whereas the cost and profit is one to one before, market demand become more sophisticated than before market downturn from year 2007, 2008 is the worst in ten years time, customers aim for cheaper and better porcelains, overseas artists and businesses came to seek new business opportunities to combine the traditional design and techniques with new design concepts by creating new shape, use of monocle, crackle, etc., overseas buyers (foreigners not overseas Chinese) looking for more contemporary and straight porcelain; market economy which closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis; 3rd International Ceramic Expo – 618 participants, 3200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas (Developed and joint with Categories 5, 23, 25, 44 and 56)

4. Geographical proximity of production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, Fuzhou and Duchang – boxes making, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism; different types of ceramic have their markets; and production proximity of different types of ceramic - Blue-and white, over-glazed famille rose by local, Korean type by Fuzhou, etc.; market proximity and lead to geographical differences in rental prices - Fanjiajing 200 RMB/m², China Porcelain Town 80 RMB/m²; 72 steps on porcelain making; blue-and-white production – normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains; Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing – only 700 degrees; the features of Jingdezhen ten porcelain factories: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – ling lung ware; Guangming – blue-and-white ling lung, Hongqi – under-glazed colour, Hongxing – daily ware, Yuzhou – daily ware, Jingxing – daily ware, Dongfeng – pots, Sculpture factory – sculpture ware (in addition to the ten factories); clear division of labour with high level of cooperation between divisions and with traders in production (Developed and joint with Categories 2, 16, 26, 27, 52, 54, 59 and additional information 2)

5. Market economy which closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis; 3rd International Ceramic Expo—618 participants, 3200 buyers, win investment 3 billion RMB from China
and 0.1 billion US dollar from overseas (Developed and joint with Category 56)

6. Source of competitiveness—good techniques (quality), innovation (design)—is the only way of surviving in economic down turn, and fame

7. The copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists—a big problem stopping the development of reproduction, about 10% of the reproduction craftsmen with innovative spirit did not receive encouragement

8. Government functions - creditability of government shaken by fail in intervening in relocating wholesalers markets and move out dangerous gas kilns from Fanjiajing – treat different traditional markets differently by comparing Fanjiajing and Shaojiajui, government failed to intervene three times in Jingdezhen as the village people are very tricky who paid the elders to stop the crowd to move the kilns, cause huge financial loses of general businessmen who took government’s word into account at first, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen, government should communicate with the public and porcelain producers; no rent monitoring system – no formal rental contract, no paper work, only oral contract, increase rent twice or four times, the market is a mess without pricing standards and regulations – hard to distinguish real antique and fake even experts with equipments; the copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists – a big problem stopping the development of reproduction, about 10% of the reproduction craftsmen with innovative spirit did not receive encouragement (Developed and joint with Categories 7, 53 and 57)

9. Entrepreneurship—innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy

10. Financial management—hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

11. Dynamic of cluster internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour (revival of colour and chemical industry with revival of porcelain, some colour formula is not available to the public but only within a family, especially in famille rose colours), firing, wrapping and boxes, porcelain transportation…; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists, unity of people from the same village, supporting industries were affecting significantly by porcelain industry, e.g. kiln owners, box makers, Importance of Jingdezhen porcelain to its local economy – Domino effect; close business network between core industry with supporting industries, network transformation from controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in counymen network and become competitions, free market formed; (theory) path interdependent, local
embedded, cultural network, business association; relevant groups to Jingdezhen cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters – 2000 RMB per month (Developed and joint with Categories 22, 45 and 55)

12. Working reproduction population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-own factories, playing cards as a phenomenon very common relax in Jingdezhen porcelain market, considered to have no influence to businesses due to the high level of specialization and uniqueness of each business, only one or two shops produce the same pattern or technique, high mobility of craftsmen – stay and return only when porcelain is making profit, people with little literacy went overseas to run porcelain exhibition – cause major political issue by talking to Fanlungong practitioners in New Zealand, poorer in salary even the best craftsmen, rent out farm ground and paid for people work on the ground – government policy on land regulation, unsecure labour contract with half employees with part-time positions, might damage country image sometimes of misbehaviour, generally poor education background of reproduction sector businessmen and craftsmen People from Fuzhou occupied 50% of total Jingdezhen population in such as porcelain production, architecture, restaurants, clothing, fruit selling, nearly every business sector (Developed and joint with Categories 37 and 61)

13. Branding of Jingdezhen porcelain industry – gain popularity through outlets in other cities or other countries and draw customers to Jingdezhen, good city image, an international famous brand, impacted by price competition in the retailing market, and ceramic from Jiangsu and Chaozhou pretended to be Jingdezhen porcelain – lower the overall quality image of Jingdezhen ware

14. Porcelain industry production management – human resource management and knowledge and expertise in entire production procedure are valued equally – hard to find good managers

15. Retailing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas, many dealers have rich experiences in holding exhibitions around China and some around the world. High mobility – without an idea of settle down in one place mostly, price reduced when more people get into porcelain retailing market, Jingdezhen porcelain is available everywhere in China through the dealers, purchase all production of one kiln – to become an exclusive agent, no standard sourcing channels, but open to the entire porcelain market according to demand in different regions, able to make phone call to order – familiar with patterns and features of each shop, sensitive to market demand in different cities, go to Jingdezhen regularly to get updates in market information and looking for new products, 70-80% of stock is daily ware with 10-20% of reproduction normally, market saturated, more supply than demand, cooperation between friends from
the same village or relatives to open a shop outside Jingdezhen, sometimes have to send children back to home town for education, mostly bring along; built new houses in home town first and then consider other places – as a norm, some buy houses in Jingdezhen, reproduction sell as real antique – cheating along with experts through bribery (make up to hundred folds profit sometimes) – some put into prison for this reason, buy antique for very low price and sell high, most of the porcelain in auction houses are real stuff - with notarization, sell a variety of porcelain no just Jingdezhen ware but also porcelain from Zhejiang, without stamp as the customer could not believe that they are empire ware; exhibitions – get all sorts of porcelain according to preliminary study of a city or district (Developed and joint with Category 32)

16. The features of Jingdezhen ten porcelain factories: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Renmin factory – blue and white ware; Hongguang factory – ling lung ware; Guangming – blue and white ling lung; Hongqi – under glazed colour, Hongxing – daily ware; Yuzhou – daily ware, Jingxing – daily ware; Dongfeng – pots, Sculpture factory – sculpture ware (in addition to the ten factories ) (Developed and joint with Category 59)

17. Divisions of porcelain markets in Jingdezhen (Developed and joint with Categories 18, 24, 28-31, 33-34, 60 and 63)

a) China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price , rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels, with design problem

b) Jinxuichangnan – decorative porcelains and tourists’ porcelains

c) Fanjiajing – in 1992, there is no many shops in Fanjiajing, half private houses and half workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, the rental price increase 10-20 folds (some said three folds) for the last fifteen to ten years, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, but people still unwilling to move out of the market, still has 20-30 kilns, the landlords here prospered and increase rental prices even in economy downturns once to four times per year, now with 2000 businesses in Jingdezhen (2008), get famous and with over fifteen year in history,
influencing Guomao, Jinchangli as they linked together in line, very narrow streets that cars could not enter, market began from 1987, assessable from Internet now, the earliest buyers are from Fujian Putian, strong village protectionism – hard to survive without porcelain, unity to against external forces to disperse the market, biggest porcelain market
d) Guomao – contemporary decorative porcelains, and appliqué porcelains which is far cheaper than handcrafts, gain profit from quantity, now over 70% of buyers go to Guomao for sourcing and 30% to Fanjiajing and duplicated 10% for other types of porcelain, the window of Jingdezhen

e) Lianshebeilu – famous artists’ showrooms
f) Xindu – decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot, with constructive design problem; most of the businesses here have their own complete production chain – require about 8-10 for the entire chain, some part time and some full time employees, 100 properties was rent out and 100 properties purchased by businesses, original from Shaojiwu, Laochang and Fanjiajing, good for workshops not for retailing – to far from town centre and inconvenient
g) Jinchangli – daily ware, famous artists’ artworks, reproduction – a bit of everything
h) Xinchang – with private workshops and kilns
i) Laochang – mostly casting porcelain
18. Jinxiuchangnan – decorative porcelains and tourists’ porcelains
19. Contemporary development of Jingdezhen porcelain cluster– early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handcrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs (where the confidence come from), Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition, 1050s starts industrialization, 1990s state-owned collapsed due to poor human resource and production management provide no social welfare security to people deployed; the number of SMEs then grown and occupied 98% of total businesses now which helps the unemployment and give social welfares to employees, Changjiang – river for water power, raw material – the clay and transportation (Developed and joint with Category 64 and additional information 1)
20. Directions of Jingdezhen porcelain development – famous artists with their artworks (Famous artists and their artworks – mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from
porcelain institutes, combining different art elements into porcelain production, such as traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen, could not support the entire porcelain industry as no helping the job market, some artworks of famous artists are actually produced by their fellow students, no by themselves, huge gap between prices of famous artists’ artworks with reproduction porcelain, offspring of Zhushanbayou – Wang, Xiliang); tourism, industries, porcelain design, and daily ware; no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate (Developed and joint with Categories 35, 62 and additional information 3)

21. Tradition means handcrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handcrafts, tradition could be the production procedures and the products come out can be modern

22. Relevant groups to Jingdezhen cluster—government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters—2000 RMB per month

23. Competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo

24. Fanjiaying—in 1992, there is no many shops in Fanjiaying, half private houses and half workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, the rental price increase 10-20 folds (some said three fold) for the last fifteen to ten years, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, but people still unwilling to move out of the market, still has 20-30 kilns, the landlords here prospered and increase rental prices even in economy downturns once to four times per year, now with 2000 businesses in Jingdezhen (2008), get famous and with over fifteen year in history, influencing Guomao, Jinchangli as they linked together in line, very narrow streets that cars could not enter, market began from 1987, assessable from Internet now, the earliest buyers are from Fujian Putian, strong village protectionism—hard to survive without porcelain, unity to against external forces to disperse the market, biggest porcelain market (Developed and joint with Category 63)

25. Development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers—order from some identical workshops—small in size, market formed itself naturally, but price for fine porcelain is very bad, the size of businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only 1/2 as before whereas the cost and profit is one to one before, market demand
become more sophisticated than before market downturn from year 2007, 2008 is the worst in ten years time, customers aim for cheaper and better porcelains, overseas artists and businesses came to seek new business opportunities to combine the traditional design and techniques with new design concepts by creating new shape, use of monoole, crackle, etc., overseas buyers (foreigners not overseas Chinese) looking for more contemporary and straight porcelains

26. Porcelain production and techniques—72 steps on porcelain making; blue and white production—normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains; Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing—only 700 degrees (Developed with Category 27 and additional information 2)

27. Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing—only 700 degrees

28. Guomao—contemporary decorative porcelains, and appliqué porcelains which is far cheaper than handcrafts, gain profit from quantity, now over 70% of buyers go to Guomao for sourcing and 30% to Fanjiajing and duplicated 10% for other types of porcelain, the window of Jingdezhen

29. Lianshebeilu—famous artists’ showrooms

30. Xindu—decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot, with constructive design problem, most of the businesses here have their own complete production chain—require about 8-10 for the entire chain, some part-time and some full-time employees, 100 properties was rent out and 100 properties purchased by businesses, original from Shaojiwu, Laochang and Fanjiajing, good for workshops not for retailing—to far from town centre and inconvenient (Developed and joint with Category 60)

31. Jinchangli—daily ware, famous artists’ artworks, reproduction—a bit of everything

32. Exhibitions—get all sorts of porcelain according to preliminary study of a city or district

33. Xinchang—with private workshops and kilns

34. Laochang—mostly casting porcelain

35. Famous artists and their artworks—mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from porcelain institutes, combining different arts elements into porcelain production, such as traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen, could not support the entire porcelain industry as no helping the job market, some artworks of famous artists are actually produced by their fellow students, no by themselves, huge gap between prices of famous artists’ artworks with reproduction porcelain, offspring of Zhushanbayou—Wang, Xiliang (Developed and joint with Category 62 and additional information 3)

36. Convenience in transportation with good location is the key for emerging
porcelain markets—proofed by success in Fanjiajing, Guomao, Jinchangli which is at town centre and clear to railway station, bus station and accommodations; while Xindu, China porcelain town and Jinxiu changnan is not as good
37. People from Fuzhou occupied 50% of total Jingdezhen population in such as porcelain production, architecture, restaurants, clothing, fruit selling, nearly every business sector
38. Features of Chinese Cluster Research and cluster research classics – great number of researchers and premature research focusing on problem-solving, new research area, crisis in research development, with great potential; importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research, from management, economics, geography, sociology fields (Developed and joint with Category 43)
39. Features of Jingdezhen traditional cultural cluster – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, lack of competitiveness, geography proximity with clear regional features, regional divisions in production chain; problems of traditional clusters – lack of competitiveness in terms of technology, design and production size; labour-intensive clusters – solved the problem of employing manpower from countryside at a transition stage of economic development in China, huge amount of closing downs under financial crisis (due to new labour law with base salary regulation, raise of raw material prices, increase in production costs, appreciation of RMB, depreciation of USD which is the currency used in international trade) (Developed and joint with Categories 41, and 48)
40. Traditional culture – source of innovation and design elements, history of continuous innovation, might just be a symbol without its original functions – cause confusion and difficulties to revive traditional industries, Jingdezhen study formed as a discipline tradition means handcrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handcrafts, tradition could be the production procedures and the products come out can be modern (Developed and joint with Category 21 and additional information 4)
41. Problems of traditional clusters—lack of competitiveness in terms of technology, design and production size
42. Entrepreneurship – drive cluster formation, local entrepreneurs
43. Importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research, from management, economics, geography, sociology fields
44. Business environment – training institution, professional market, spirit of innovation and risk taking, globalization of production network with positive impact, internationally active academic support and expertise, compete with a huge group of clusters from within China, and from overseas, like Taiwan, Korea, Japan, Italy, Netherland, with advanced technology and level of industrialization
45. Networking – path interdependent, local embedded, cultural network, business association
46. Cluster incubation and breeding – important factors in breeding clusters – historical opportunities (right time), geography proximity, international business activities (exporting) and local entrepreneurship, less government intervention in start-up phrase lead to succeed in electronic and IT industries, globalisation; convenience in transportation with good location is the key for emerging porcelain markets – proofed by success in Fanjiajing, Guomao, Jinchangli which is at town centre and clear to railway station, bus station and accommodations; while Xindu, China porcelain town and Jinxiu changnan is not as good (Developed and joint with Categories 36 and 47)

47. Important factors in breeding clusters — historical opportunities (right time), geography proximity, international business activities (exporting) and local entrepreneurship, less government intervention in start-up phrase lead to succeed in electronic and IT industries, globalisation

48. Labour-intensive clusters — solved the problem of employing manpower from countryside at a transition stage of economic development in China, huge amount of closing downs under financial crisis (due to new labour law with base salary regulation, raise of raw material prices, increase in production costs, appreciation of RMB, depreciation of USD which is the currency used in international trade)

49. Industrialization and upgrading — satisfy the majority first, the hierarchy of consumption, different positions in value chain, customer segmentation, threat and opportunity for traditional cluster to upgrade (e.g. silk production in Jiangsu and Zhejiang), start from small industry with clear and very focused specialisation — e.g. TV into broad complicated electronic cluster; functional transformation of ceramic (original functions disappeared, aesthetic appreciation, distance from daily life, fine ware with very limited number of consumers, channels of transformation — e.g. architecture. Require open-minded) (Developed and combined with Category 46)

50. Innovation — even traditional cluster need continuous innovation and creativity to gain the market share (experience from successful ceramic cluster in Taiwan), to make good connection with contemporary design elements in order to satisfy customer needs better; could not go out of tradition (Developed and joint with Category 58)

51. Research potentials in Jingdezhen (covered and deleted)

52. Geographical proximity — different types of ceramic have their markets; and production proximity of different types of ceramic — Blue and white, over-glazed famille rose by local, Korean type by Fuzhou, etc.; market proximity and lead to geographical differences in rental prices — Fanjiajing 200 RMB/m², China Porcelain Town 80 RMB/m²

53. The market is a mess — Hard to distinguish real antique and fake even experts with equipments, without pricing standards and regulations

54. Clear division of labour in production

55. Business network — close business network between core industry with supporting industries, network transformation from controlled by clans and regional labour unions in different steps of porcelain production and trade,
diminishing in countrymen network and become competitions, free-market formed

56. Close relationship between Jingdezhen porcelain industry with global economy—
3rd International Ceramic Expo—618 participants, 3200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas

57. No-rent-monitoring system—no formal rental contract, no paper work, only oral contract, increase rent twice or four times

58. Innovation—could not go out of tradition


60. Xindu—most of the businesses here have their own complete production chain—require about 8-10 persons for the entire chain, some part-time and some full-time employees, 100 properties was rent out and 100 properties purchased by businesses, original from Shaojiju, Laochang and Fanjiajing, good for workshops not for retailing—to far from town centre and inconvenient

61. Generally poor education background of reproduction sector businessmen and craftsmen

62. Huge gap between prices of famous artists’ artworks with reproduction porcelain

63. Fanjiajing—market began from 1987, assessable from Internet now, the earliest buyers are from Fujian Putian, strong village protectionism—hard to survive without porcelain, unity to against external forces to disperse the market, biggest porcelain market

64. Transformation of the porcelain production chain—1050s starts industrialization, 1990s state-owned collapsed due to poor human resource and production management provide no social welfare security to people deployed; the number of SMEs then grown and occupied 98% of total businesses now which helps the unemployment and give social welfare to employees

Additional information from Historiography

1. factors for cluster incubation, Changjiang—river for water power, raw material—the clay and transportation
2. 72 steps in porcelain making
3. Famous artists—offspring of Zhushanbayou—Wang, Xiliang
4. Culture—Jingdezhen study formed as a discipline.

Categories (Second Resort)
1. Important business concepts in Jingdezhen clusters (Developed and joint with Categories 6, 9, 10, 13, 14, 42, 49 and 50)
   a) SMEs - Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop — phenomenon of post-industrialization and go back to family as a unit of
production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit, in 2007 it is hard to make profit even at the salary of a good craftsman

b) Competitiveness – good techniques (quality), innovation (design) – is the only way of surviving in economic down-turn, and fame
c) Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy, drive cluster formation, local entrepreneurs
d) Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition
e) Porcelain industry production management – human resource management and knowledge and expertise in entire production procedure are valued equally – hard to find good managers
f) Industrialization and upgrading – satisfy the majority first, the hierarchy of consumption, different positions in value chain, customer segmentation, threat and opportunity for traditional cluster to upgrade (e.g. silk production in Jiangsu and Zhejiang), start from small industry with clear and very focused specialisation – e.g. TV into broad complicated electronic cluster; functional transformation of ceramic (original functions disappeared, aesthetic appreciation, distance from daily life, fine ware with very limited number of consumers, channels of transformation - e.g. architecture. Require open-minded) (Developed and combined with Category 46)
g) Innovation – even traditional cluster need continuous innovation and creativity to gain the market share (experience from successful ceramic cluster in Taiwan), to make good connection with contemporary design elements in order to satisfy customer needs better; could not go out of tradition (Developed and joint with Category 58)
h) Branding of Jingdezhen porcelain industry – gain popularity through outlets in other cities or other countries and draw customers to Jingdezhen, good city image, an international famous brand, impacted by price competition in the retailing market, and ceramic from Jiangsu and Chaozhou pretended to be Jingdezhen porcelain – lower the overall quality image of Jingdezhen ware

2. External business environment – cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption, collapsed of state-own factories lead to stiff competition in porcelain market as most of them remained in the market with new craftsmen from outside Jingdezhen, get into negative cycle of competition with blind price-cutting which leads to closing downs – at the end the businesses getting smaller without capital to employ beyond family
members; (theory) business environment – training institution, professional market, spirit of innovation and risk-taking, globalization of production network with positive impact, internationally active academic support and expertise, compete with a huge group of clusters from within China, and from overseas, like Taiwan, Korea, Japan, Italy, Netherland, with advanced technology and level of industrialization; competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo; development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers – order from some identical workshops – small in size, market formed itself naturally, but price for fine porcelain is very bad, the size of businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only 1/2 as before whereas the cost and profit is one to one before, market demand become more sophisticated than before market downturn from year 2007, 2008 is the worst in ten years time, customers aim for cheaper and better porcelains, overseas artists and businesses came to seek new business opportunities to combine the traditional design and techniques with new design concepts by creating new shape, use of monocle, crackle, etc., overseas buyers (foreigners not overseas Chinese) looking for more contemporary and straight porcelain; market economy which closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis; 3rd International Ceramic Expo – 618 participants, 3200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas (Developed and joint with Categories 5, 23, 25, 44 and 56)

3. Geographical proximity and division of labour - production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, Fuzhou and Duchang – boxes making, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism; different types of ceramic have their markets; and production proximity of different types of ceramic - Blue-and white, over-glazed famille rose by local, Korean type by Fuzhou, etc.; market proximity and lead to geographical differences in rental prices - Fanjiajing 200 RMB/m², China Porcelain Town 80 RMB/m²; 72 steps on porcelain making; blue-and-white production – normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains; Under-glazed, normally just specialized in few steps in production, such as drawing, filling and firing – only 700 degrees; the features of Jingdezhen ten porcelain factories: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality
famille rose ware; Renmin factory – blue-and-white ware; Hongguang factory – ling lung ware; Guangming – blue-and-white ling lung, Hongqi – under-glazed colour, Hongxing – daily ware, Yuzhou – daily ware, Jingxing – daily ware, Dongfeng – pots, Sculpture factory – sculpture ware (in addition to the ten factories); Clear division of labour with high level of cooperation between divisions and with traders in production (Developed and joint with Categories 2, 16, 26, 27, 52, 54, 59 and additional information 2)

4. Government functions - creditability of government shaken by fail in intervening in relocating wholesalers markets and move out dangerous gas kilns from Fanjiajing – treat different traditional markets differently by comparing Fanjiajing and Shaojiwu, government failed to intervene three times in Jingdezhen as the village people are very tricky who paid the elders to stop the crowd to move the kilns, cause huge financial loses of general businessmen who took government’s word into account at first, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen, government should communicate with the public and porcelain producers; no rent monitoring system – no formal rental contract, no paper work, only oral contract, increase rent twice or four times, the market is a mess without pricing standards and regulations – hard to distinguish real antique and fake even experts with equipments; the copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists – a big problem stopping the development of reproduction, about 10% of the reproduction craftsmen with innovative spirit did not receive encouragement (Developed and joint with Categories 7, 53 and 57)

5. Internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour (revival of colour and chemical industry with revival of porcelain, some colour formula is not available to the public but only within a family, especially in famille rose colours) , firing, wrapping and boxes, porcelain transportation….; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists, unity of people from the same village, supporting industries were affecting significantly by porcelain industry, e.g. kiln owners, box makers, Importance of Jingdezhen porcelain to its local economy – Domino effect; close business network between core industry with supporting industries, network transformation from controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in countrymen network and become competitions, free market formed; (theory) path interdependent, local embedded, cultural network, business association; relevant groups to Jingdezhen cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters – 2000 RMB per month (Developed and joint with Categories 22, 45 and 55)
6. **Industry population features** - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-owned factories, playing cards as a phenomenon very common relax in Jingdezhen porcelain market, considered to have no influence to businesses due to the high level of specialization and uniqueness of each business, only one or two shops produce the same pattern or technique, high mobility of craftsmen – stay and return only when porcelain is making profit, people with little literacy went overseas to run porcelain exhibition – cause major political issue by talking to Fanlungong practitioners in New Zealand, poorer in salary even the best craftsmen, rent out farm ground and paid for people work on the ground – government policy on land regulation, unsecure labour contract with half employees with part-time positions, might damage country image sometimes of misbehaviour, generally poor education background of reproduction sector businessmen and craftsmen People from Fuzhou occupied 50% of total Jingdezhen population in such as porcelain production, architecture, restaurants, clothing, fruit selling, nearly every business sector (Developed and joint with Categories 37 and 61)

7. **Buyers marketing network** – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas, many dealers have rich experiences in holding exhibitions around China and some around the world. High mobility – without an idea of settle down in one place mostly, price reduced when more people get into porcelain retailing market, Jingdezhen porcelain is available everywhere in China through the dealers, purchase all production of one kiln – to become an exclusive agent, no standard sourcing channels, but open to the entire porcelain market according to demand in different regions, able to make phone call to order – familiar with patterns and features of each shop, sensitive to market demand in different cities, go to Jingdezhen regularly to get updates in market information and looking for new products, 70-80% of stock is daily ware with 10-20% of reproduction normally, market saturated, more supply than demand, cooperation between friends from the same village or relatives to open a shop outside Jingdezhen, sometimes have to send children back to home town for education, mostly bring along; built new houses in home town first and then consider other places – as a norm, some buy houses in Jingdezhen, reproduction sell as real antique – cheating along with experts through bribery (make up to hundred folds profit sometimes) – some put into prison for this reason, buy antique for very low price and sell high, most of the porcelain in auction houses are real stuff - with notarization, sell a variety of porcelain no just Jingdezhen ware but also porcelain from Zhejiang, without stamp as the customer could not believe that they are empire ware; exhibitions – get all sorts of porcelain according to preliminary study of a city or district (Developed and joint with Category 32)

8. **Divisions of porcelain markets in Jingdezhen** (Developed and joint with
Categories 18, 24, 28-31, 33-34, 60 and 63)

a) China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price, rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels, with design problem

b) Jinxiuchangnan – decorative porcelains and tourists’ porcelains

c) Fanjiajing – in 1992, there is no many shops in Fanjiajing, half private houses and half workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, the rental price increase 10-20 folds (some said three folds) for the last fifteen to ten years, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, but people still unwilling to move out of the market, still has 20-30 kilns, the landlords here prospered and increase rental prices even in economy downturns once to four times per year, now with 2000 businesses in Jingdezhen (2008), get famous and with over fifteen year in history, influencing Guomao, Jinchangli as they linked together in line, very narrow streets that cars could not enter, market began from 1987, assessable from Internet now, the earliest buyers are from Fujian Putian, strong village protectionism – hard to survive without porcelain, unity to against external forces to disperse the market, biggest porcelain market

d) Guomao – contemporary decorative porcelains, and appliqué porcelains which is far cheaper than handcrafts, gain profit from quantity, now over 70% of buyers go to Guomao for sourcing and 30% to Fanjiajing and duplicated 10% for other types of porcelain, the window of Jingdezhen

e) Lianshebeilu – famous artists’ showrooms

f) Xindu – decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot, with constructive design problem; most of the businesses here have their own complete production chain – require about 8-10 for the entire chain, some part time and some full time employees, 100 properties was rent out and 100 propriety purchased by businesses, original from Shaojiwu, Laochang and Fanjiajing, good for workshops not for retailing – to far from town centre and
inconvenient

g) Jinchangli – daily ware, famous artists’ artworks, reproduction – a bit of everything

h) Xinchang – with private workshops and kilns

i) Laochang – mostly casting porcelain

9. Contemporary development of Jingdezhen porcelain cluster – early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handcrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs (where the confidence come from), Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China – with capitalism modernization and market economy with free competition, 1950s starts industrialization, 1990s state-owned collapsed due to poor human resource and production management provide no social welfare security to people deployed; the number of SMEs then grown and occupied 98% of total businesses now which helps the unemployment and give social welfares to employees, Changjiang – river for water power, raw material – the clay and transportation (Developed and joint with Category 64 and additional information 1)

10. Directions of Jingdezhen porcelain development – famous artists with their artworks (Famous artists and their artworks – mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from porcelain institutes, combining different arts elements into porcelain production, such as traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen, could not support the entire porcelain industry as no helping the job market, some artworks of famous artists are actually produced by their fellow students, no by themselves, huge gap between prices of famous artists’ artworks with reproduction porcelain, offspring of Zhushanbayou – Wang, Xiliang); tourism, industries, porcelain design, and daily ware; no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate (Developed and joint with Categories 35, 62 and additional information 3)

11. Features of Chinese Cluster Research and cluster research classics – great number of researchers and premature research focusing on problem-solving, new research area, crisis in research development, with great potential; importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research, from management, economics, geography, sociology fields (Developed and joint with Category 43)

12. Features of Jingdezhen traditional cultural cluster – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, lack of competitiveness, geography proximity with clear regional
features, regional divisions in production chain; problems of traditional clusters –
lack of competitiveness in terms of technology, design and production size;
labour-intensive clusters – solved the problem of employing manpower from
countryside at a transition stage of economic development in China, huge amount
of closing downs under financial crisis (due to new labour law with base salary
regulation, raise of raw material prices, increase in production costs, appreciation
of RMB, depreciation of USD which is the currency used in international trade)
(Developed and joint with Categories 41, and 48)

13. Traditional culture – source of innovation and design elements, history of
continuous innovation, might just be a symbol without its original functions –
cause confusion and difficulties to revive traditional industries, Jingdezhen study
formed as a discipline tradition means handicrafts in Jingdezhen and tradition
could turn into modern, tradition includes reproduction and that is also handicrafts,
tradition could be the production procedures and the products come out can be
modern (Developed and joint with Category 21 and additional information 4)

14. Cluster incubation and breeding – important factors in breeding clusters –
historical opportunities (right time), geography proximity, international business
activities (exporting) and local entrepreneurship, less government intervention in
start-up phrase lead to succeed in electronic and IT industries, globalisation;
convenience in transportation with good location is the key for emerging
porcelain markets – proofed by success in Fanjiajing, Guomao, Jinchangli which
is at town centre and clear to railway station, bus station and accommodations;
while Xindu, China porcelain town and Jinxuichangnan is not as good
Contemporary development of Jingdezhen porcelain cluster– early 1900
modernization reformed by establishing new confidence through giving up
traditions, struggle to make a connection to the rest of the world; from 1949
Jingdezhen transformed from handcrafting to industrialization and planned
economy, giving up handicrafts; since 1990s, people discovered what have been
given up are the treasures and try to protect the inheritance and heirs (where the
confidence come from), Jingdezhen started to reemphasis handicrafts rather than
industrial productions, by upgrading handicrafts to arts and culture; from 1990s
that is the second modernization in China- with capitalism modernization and
market economy with free competition, 1050s starts industrialization, 1990s
state-owned collapsed due to poor human resource and production management
provide no social welfare security to people deployed; the number of SMEs then
grown and occupied 98% of total businesses now which helps the unemployment
and give social welfares to employees, Changjiang – river for water power, raw
material – the clay and transportation (Developed and joint with Category 64 and
additional information 1) (Developed and joint with Categories 36, 47, 64,
additional information 1 and new Category 9)

Categories (Second Resort)
1. Important business concepts in Jingdezhen clusters (Developed and joint with
Categories 6, 9, 10, 13, 14, 42, 49 and 50)
a) SMEs - Small family-owned SMEs by selling own production and hiring stand(s) rather than shop(s) for display, husband and wife shop – phenomenon of post-industrialization and go back to family as a unit of production and sustain family relationships better, unlike production chain in big organisations to produce standardized products while some SMEs have production chain that everyone specialized in one procedure to gain efficiency (still unlike big organisation), mostly business owners started from craftsmanship, able to control the entire production process by its own with own gas kiln, different from retailers and dealers who resell porcelain for better profit, in 2007 it is hard to make profit even at the salary of a good craftsman

b) Competitiveness – good techniques (quality), innovation (design) – is the only way of surviving in economic down-turn, and fame

c) Entrepreneurship – innovation, challenge and effort, stocking strategy, business philosophy, pricing strategy, drive cluster formation, local entrepreneurs

d) Financial management – hard to get bank loans thus to control liquidity carefully, key factor and strategy in competition

e) Porcelain industry production management – human resource management and knowledge and expertise in entire production procedure are valued equally – hard to find good managers

f) Industrialization and upgrading – satisfy the majority first, the hierarchy of consumption, different positions in value chain, customer segmentation, threat and opportunity for traditional cluster to upgrade (e.g. silk production in Jiangsu and Zhejiang), start from small industry with clear and very focused specialisation – e.g. TV into broad complicated electronic cluster; functional transformation of ceramic (original functions disappeared, aesthetic appreciation, distance from daily life, fine ware with very limited number of consumers, channels of transformation - e.g. architecture. Require open-minded) (Developed and combined with Category 46)

g) Innovation – even traditional cluster need continuous innovation and creativity to gain the market share (experience from successful ceramic cluster in Taiwan), to make good connection with contemporary design elements in order to satisfy customer needs better; could not go out of tradition (Developed and joint with Category 58)

h) Branding of Jingdezhen porcelain industry – gain popularity through outlets in other cities or other countries and draw customers to Jingdezhen, good city image, an international famous brand, impacted by price competition in the retailing market, and ceramic from Jiangsu and Chaozhou pretended to be Jingdezhen porcelain – lower the overall quality image of Jingdezhen ware

2. External business environment – cut-throat competition, cheating, plagiarism – people reduced in production costs to keep price down and improve in quality in order to avoid plagiarism, copyright issues and corruption, collapsed of state-own factories lead to stiff competition in porcelain market as most of them remained
in the market with new craftsmen from outside Jingdezhen, get into negative cycle of competition with blind price-cutting which leads to closing downs – at the end the businesses getting smaller without capital to employ beyond family members; (theory) business environment – training institution, professional market, spirit of innovation and risk-taking, globalization of production network with positive impact, internationally active academic support and expertise, compete with a huge group of clusters from within China, and from overseas, like Taiwan, Korea, Japan, Italy, Netherland, with advanced technology and level of industrialization; competitors of Jingdezhen porcelain clusters in China are: Chaozhou, Liling and Zibo; development of the market demand and supply: market prospers from 1990s to early 2000s, more people but less profit as more businessmen get into the market and reduce the market share for each of them, loyal customers – order from some identical workshops – small in size, market formed itself naturally, but price for fine porcelain is very bad, the size of businesses is only 1/3 of today’s ten years ago, increased in production costs leads to a dramatic fall in profit and price, only 1/2 as before whereas the cost and profit is one to one before, market demand become more sophisticated than before market downturn from year 2007, 2008 is the worst in ten years time, customers aim for cheaper and better porcelains, overseas artists and businesses came to seek new business opportunities to combine the traditional design and techniques with new design concepts by creating new shape, use of monochrome, crackle, etc., overseas buyers (foreigners not overseas Chinese) looking for more contemporary and straight porcelain; market economy which closely associated with global economy – porcelain is a luxury product, buy when have spare money after life necessities, many consumers are from overseas, business downturn during Beijing Olympics, not as good as before (early 2000s) affected by financial crisis; 3rd International Ceramic Expo – 618 participants, 3200 buyers, win investment 3 billion RMB from China and 0.1 billion US dollar from overseas (Developed and joint with Categories 5, 23, 25, 44 and 56)

3. Geographical proximity and division of labour - production specialization with nepotism or apprentice – secure to pass on the holistic techniques, more people from Fuzhou are doing businesses in Jingdezhen while more people from Duchang became craftsmen, Duchang specialized in over-glazed famille rose, Boyang specialized in carving, Leping specialized in flowers and birds drawing, Fuzhou and Duchang – boxes making, clear division of expertise according to place of origin, nepotism and apprentice phenomena reduced over time, due to the negative effect of family businesses in terms of competing mechanism; different types of ceramic have their markets; and production proximity of different types of ceramic - Blue-and white, over-glazed famille rose by local, Korean type by Fuzhou, etc.; market proximity and lead to geographical differences in rental prices - Fanjiaying 200 RMB/m², China Porcelain Town 80 RMB/m²; 72 steps on porcelain making; blue-and-white production – normally the craftsmen produce from clay to final product by one workshop, firing with over 1000 degrees, require large space for drying up porcelains; Under-glazed,
normally just specialized in few steps in production, such as drawing, filling and firing – only 700 degrees; the features of Jingdezhen ten porcelain factories: Jianguo factory – high temperature colour glaze ware; Arts factory – high quality famille rose ware; Remin factory – blue-and-white ware; Hongguang factory – ling lung ware; Guangming – blue-and-white ling lung, Hongqi – under-glazed colour, Hongxing – daily ware, Yuzhou – daily ware, Jingxing – daily ware, Dongfeng – pots, Sculpture factory – sculpture ware (in addition to the ten factories); Clear division of labour with high level of cooperation between divisions and with traders in production (Developed and joint with Categories 2, 16, 26, 27, 52, 54, 59 and additional information 2).

4. Government functions - creditability of government shaken by fail in intervening in relocating wholesalers markets and move out dangerous gas kilns from Fanjiajing – treat different traditional markets differently by comparing Fanjiajing and Shaojiwu, government failed to intervene three times in Jingdezhen as the village people are very tricky who paid the elders to stop the crowd to move the kilns, cause huge financial loses of general businessmen who took government’s word into account at first, real estate, and rental price control, collapse of state-own factories – a big loss of Jingdezhen, government should communicate with the public and porcelain producers; no rent monitoring system – no formal rental contract, no paper work, only oral contract, increase rent twice or four times, the market is a mess without pricing standards and regulations – hard to distinguish real antique and fake even experts with equipments; the copyright system applied to famous artists with their artworks, but not protecting innovative techniques created by reproduction artists – a big problem stopping the development of reproduction, about 10% of the reproduction craftsmen with innovative spirit did not receive encouragement (Developed and joint with Categories 7, 53 and 57).

5. Internal business network in Jingdezhen – Shifting of business network along with business development, used to have regional labour unit, clan and village group organisations and no more now, functional business network with supporting industries such as: white clay, pens, glaze, colour (revival of colour and chemical industry with revival of porcelain, some colour formula is not available to the public but only within a family, especially in famille rose colours), firing, wrapping and boxes, porcelain transportation...; different raw materials deal with different wholesalers – quality first, free market in raw materials sourcing, general networking between relatives and friends still exists, unity of people from the same village, supporting industries were affecting significantly by porcelain industry, e.g. kiln owners, box makers, Importance of Jingdezhen porcelain to its local economy – Domino effect; close business network between core industry with supporting industries, network transformation from controlled by clans and regional labour unions in different steps of porcelain production and trade, diminishing in countrymen network and become competitions, free market formed; (theory) path interdependent, local embedded, cultural network, business association; relevant groups to Jingdezhen.
cluster – government as the policy maker leads the development of porcelain industry, most important is the market demand, porcelain transporters – 2000 RMB per month (Developed and joint with Categories 22, 45 and 55)

6. Industry population features - Graduates from local porcelain institute, the unemployed, young adults who have no interest in higher education, most practitioners from Fuzhou, Duchang, and local people, many junior high school graduates, deployed from state-own factories, playing cards as a phenomenon very common relax in Jingdezhen porcelain market, considered to have no influence to businesses due to the high level of specialization and uniqueness of each business, only one or two shops produce the same pattern or technique, high mobility of craftsmen – stay and return only when porcelain is making profit, people with little literacy went overseas to run porcelain exhibition – cause major political issue by talking to Fanlungon practitioners in New Zealand, poorer in salary even the best craftsmen, rent out farm ground and paid for people work on the ground – government policy on land regulation, unsecure labour contract with half employees with part-time positions, might damage country image sometimes of misbehaviour, generally poor education background of reproduction sector businessmen and craftsmen People from Fuzhou occupied 50% of total Jingdezhen population in such as porcelain production, architecture, restaurants, clothing, fruit selling, nearly every business sector (Developed and joint with Categories 37 and 61)

7. Buyers marketing network – retailers and dealers running porcelain shops around China and come to Jingdezhen regulation for sourcing, retailers at the coastal cities such as Guangzhou, Xiamen, and Hong Kong come to pick up porcelains and resell overseas, many dealers have rich experiences in holding exhibitions around China and some around the world. High mobility – without an idea of settle down in one place mostly, price reduced when more people get into porcelain retailing market, Jingdezhen porcelain is available everywhere in China through the dealers, purchase all production of one kiln – to become an exclusive agent, no standard sourcing channels, but open to the entire porcelain market according to demand in different regions, able to make phone call to order – familiar with patterns and features of each shop, sensitive to market demand in different cities, go to Jingdezhen regularly to get updates in market information and looking for new products, 70-80% of stock is daily ware with 10-20% of reproduction normally, market saturated, more supply than demand, cooperation between friends from the same village or relatives to open a shop outside Jingdezhen, sometimes have to send children back to home town for education, mostly bring along; built new houses in home town first and then consider other places– as a norm, some buy houses in Jingdezhen, reproduction sell as real antique – cheating along with experts through bribery (make up to hundred folds profit sometimes) – some put into prison for this reason, buy antique for very low price and sell high, most of the porcelain in auction houses are real stuff - with notarization, sell a variety of porcelain no just Jingdezhen ware but also porcelain from Zhejiang, without stamp as the customer could not believe that
they are empire ware; exhibitions – get all sorts of porcelain according to preliminary study of a city or district (Developed and joint with Category 32)

8. Divisions of porcelain markets in Jingdezhen (Developed and joint with Categories 18, 24, 28-31, 33-34, 60 and 63)

a) China porcelain town – with 1000-2000 businesses, moved from Jinchangli or private workshops, targeting tourists with porcelain from Chaozhou with most visitors from Guangzhou (not locally produced, cheaper, smaller arts porcelains), mostly selling daily ware, and a little bit of modern blue-and-white ware, could not sell fine porcelains here as nobody appreciates them and bargaining for very low price , rental price for 10-25 RMB/m², good quality housing with mostly warehouses and accommodation – very low in rent, just make a living, mostly decorative porcelain, a variety of different types of porcelain at different price levels, with design problem

b) Jinxiuchangnan – decorative porcelains and tourists’ porcelains

c) Fanjiajing – in 1992, there is no many shops in Fanjiajing, half private houses and half workshops, geographical proximity form through these factors: close to railway station, convenience in accommodation with many hotels ran by Fuzhou people and formed a private porcelain market, rental price in 1993 is about 5 RMB/m² to 100 RMB/m² in 2008, the rental price increase 10-20 folds (some said three folds) for the last fifteen to ten years, once gain the fame in the market will move out of the market sooner or later without suffering from high rental cost into Guomao, private houses, etc.; the by-product of incredible rental price is most people started to hire a shop and shared with four to five businesses, about 75% of population from Fuzhou, but people still unwilling to move out of the market, still has 20-30 kilns, the landlords here prospered and increase rental prices even in economy downturns once to four times per year, now with 2000 businesses in Jingdezhen (2008), get famous and with over fifteen year in history, influencing Guomao, Jinchangli as they linked together in line, very narrow streets that cars could not enter, market began from 1987, assessable from Internet now, the earliest buyers are from Fujian Putian, strong village protectionism – hard to survive without porcelain, unity to against external forces to disperse the market, biggest porcelain market

d) Guomao – contemporary decorative porcelains, and appliqué porcelains which is far cheaper than handcrafts, gain profit from quantity, now over 70% of buyers go to Guomao for sourcing and 30% to Fanjiajing and duplicated 10% for other types of porcelain, the window of Jingdezhen

e) Lianshebeilu – famous artists’ showrooms

f) Xindu – decorative porcelain and a bit of reproduction, far from city centre, many people bought shops felt like fooled by government and feel very regret, the 1st project with 300 shops is under very poor condition, but the builder planned to build the 3rd project at the same spot, with constructive design problem; most of the businesses here have their own complete production chain – require about 8-10 for the entire chain, some part time and
some full time employees, 100 properties was rent out and 100 properties purchased by businesses, original from Shaojiwu, Laochang and Fanjiajing, good for workshops not for retailing – to far from town centre and inconvenient

g) Jinchangli – daily ware, famous artists’ artworks, reproduction – a bit of everything

h) Xinchan – with private workshops and kilns

i) Laochang – mostly casting porcelain

9. Directions of Jingdezhen porcelain development – famous artists with their artworks (Famous artists and their artworks – mostly with background from traditional Chinese realistic painting, consist in innovation, mostly graduates from porcelain institutes, combining different arts elements into porcelain production, such as traditional Chinese painting and Chinese calligraphy, has its own market location in Jingdezhen, could not support the entire porcelain industry as no helping the job market, some artworks of famous artists are actually produced by their fellow students, no by themselves, huge gap between prices of famous artists’ artworks with reproduction porcelain, offspring of Zhushanbayou – Wang, Xiliang); tourism, industries, porcelain design, and daily ware; no mass production but extremely fine porcelains in order to save Jingdezhen and solve the problem of high unemployment rate (Developed and joint with Categories 35, 62 and additional information 3)

10. Features of Chinese Cluster Research and cluster research classics – great number of researchers and premature research focusing on problem-solving, new research area, crisis in research development, with great potential; importance of key cluster theories – Porter, Marshall, Krugman and Schumpeter and other western literature in order to spot contribution of Chinese cluster research, from management, economics, geography, sociology fields (Developed and joint with Category 43)

11. Features of Jingdezhen traditional cultural cluster – struggle to survive, cheap labour costs, cheap in rent/land, and cost to raw materials, innovation is not as important, lack of competitiveness, geography proximity with clear regional features, regional divisions in production chain; problems of traditional clusters – lack of competitiveness in terms of technology, design and production size; labour-intensive clusters – solved the problem of employing manpower from countryside at a transition stage of economic development in China, huge amount of closing downs under financial crisis (due to new labour law with base salary regulation, raise of raw material prices, increase in production costs, appreciation of RMB, depreciation of USD which is the currency used in international trade) (Developed and joint with Categories 41, and 48)

12. Traditional culture – source of innovation and design elements, history of continuous innovation, might just be a symbol without its original functions – cause confusion and difficulties to revive traditional industries, Jingdezhen study formed as a discipline tradition means handicrafts in Jingdezhen and tradition could turn into modern, tradition includes reproduction and that is also handicrafts,
tradition could be the production procedures and the products come out can be modern (Developed and joint with Category 21 and additional information 4)

13. Cluster incubation and breeding – important factors in breeding clusters – historical opportunities (right time), geography proximity, international business activities (exporting) and local entrepreneurship, less government intervention in start-up phrase lead to succeed in electronic and IT industries, globalisation; convenience in transportation with good location is the key for emerging porcelain markets – proofed by success in Fanjiajing, Guomao, Jinchangli which is at town centre and clear to railway station, bus station and accommodations; while Xindu, China porcelain town and Jinxuanchangnan is not as good

Contemporary development of Jingdezhen porcelain cluster– early 1900 modernization reformed by establishing new confidence through giving up traditions, struggle to make a connection to the rest of the world; from 1949 Jingdezhen transformed from handcrafting to industrialization and planned economy, giving up handcrafts; since 1990s, people discovered what have been given up are the treasures and try to protect the inheritance and heirs (where the confidence come from), Jingdezhen started to reemphasis handcrafts rather than industrial productions, by upgrading handcrafts to arts and culture; from 1990s that is the second modernization in China- with capitalism modernization and market economy with free competition, 1050s starts industrialization, 1990s state-owned collapsed due to poor human resource and production management provide no social welfare security to people deployed; the number of SMEs then grown and occupied 98% of total businesses now which helps the unemployment and give social welfares to employees, Changjiang – river for water power, raw material – the clay and transportation (Developed and joint with Category 64 and additional information 1) (Developed and joint with Categories 36, 47, 64, additional information 1 and new Category 9)

II Possible relevant field of literature accordingly
1. Important business concepts in Jingdezhen cluster
   a) SMEs
   b) Competitiveness
   c) Entrepreneurship
   d) Financial management
   e) Production management
   f) Industrialization and upgrading
   g) Innovation
   h) Branding strategies (city image)
2. External business environment
3. Geographical proximity and division of labour
4. Government functions in clustering
5. Cluster internal business network
6. Industry workforce features
7. Buyers marketing network
8. Divisions of markets
9. Directions future development
10. Chinese cluster research and cluster research classics
11. Features of Jingdezhen traditional cluster
12. Traditional culture
13. Cluster incubation and breeding