



# 2012 中国企业调查

2012 Survey: Challenges and Success Factors  
for Chinese Companies

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中欧国际工商学院

China Europe International Business School

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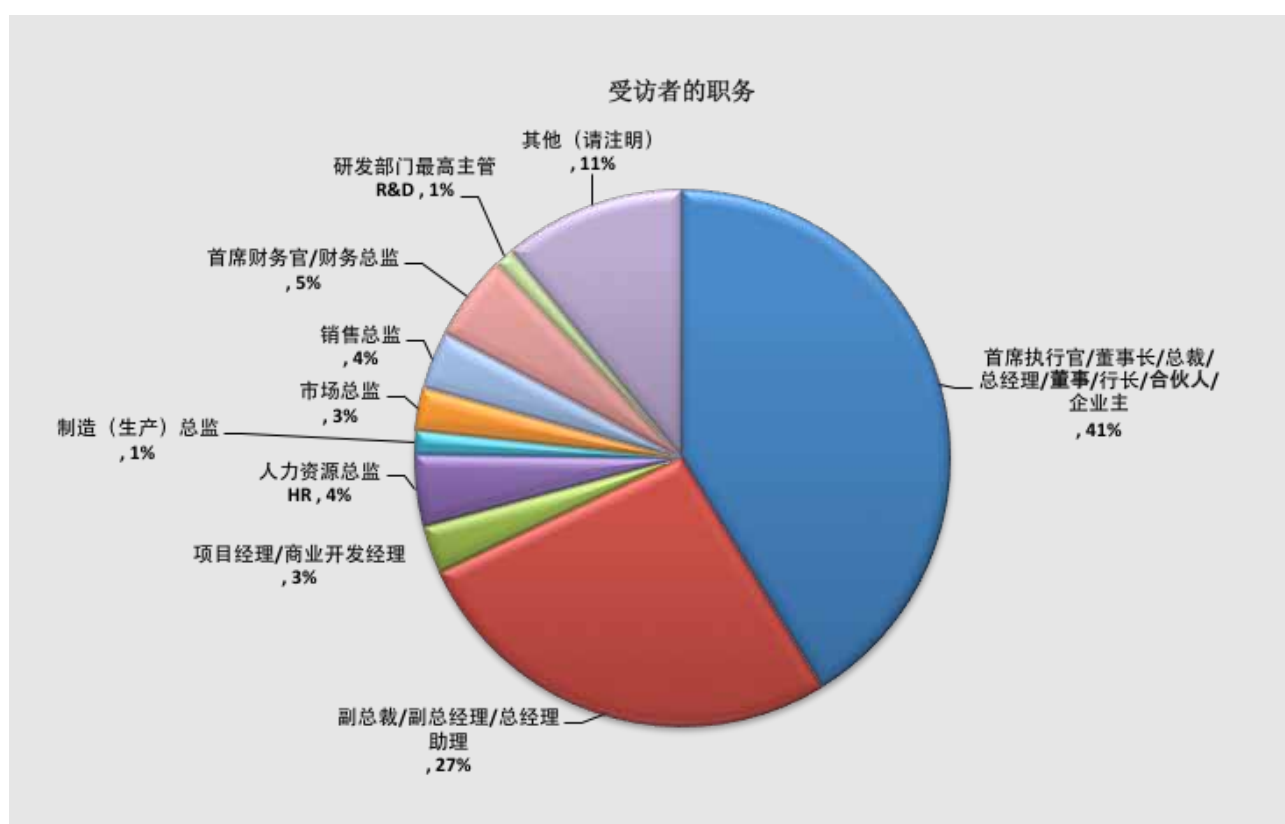
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# 导言

中欧国际工商学院每年就中国企业经营环境进行调查，今年是该调查的第二年。该调查的目的是帮助中国企业对经营环境所提供的机会和挑战有更好的认识，以便制定出更好的战略。

中国企业调查每年都会就企业经营状况及相关问题向中欧校友、在读 EMBA 学员、EDP 学员发放调查问卷，问卷内容涵盖企业背景、经营业绩、生产与供应、投资与融资、人力资源、市场竞争、销售管理、创新与研发、知识产权、政府政策、外贸与对外投资、前景与挑战等广泛话题。

2011 年 10 月末，中欧教授研究团队通过校友会 and EMBA/EDP 办公室向校友和 EMBA/EDP 在读学员发放了网络匿名调查问卷。在 10 月末至 11 月末的问卷调查期间，共收到有效问卷 348 份，其中 68% 的受访者为公司高层管理人员，其余为职能部门负责人。92% 的受访者有超过 10 年以上的工作经验，78% 的受访者为男性。



“其他”包括：销售代表，首席运营官，高级经理等。

中欧国际工商学院教授团队的成员包括范悦安教授、周东生教授以及研究员陈丽佳、李俊骏。我们在调查过程中得到了多方面的支持和帮助，在此我们表示由衷的感谢！首先，我们感谢中欧国际工商学院院方的大力支持，感谢校友办公室，EMBA 办公室和 EDP 办公室在发放调查问卷方面给予的帮助，同时我们要特别感谢广大校友和 EMBA 学员积极参与我们的调查，感谢所有关心和帮助过我们的人。正是来自方方面面的支持和帮助，才使我们的调查得以成功完成。

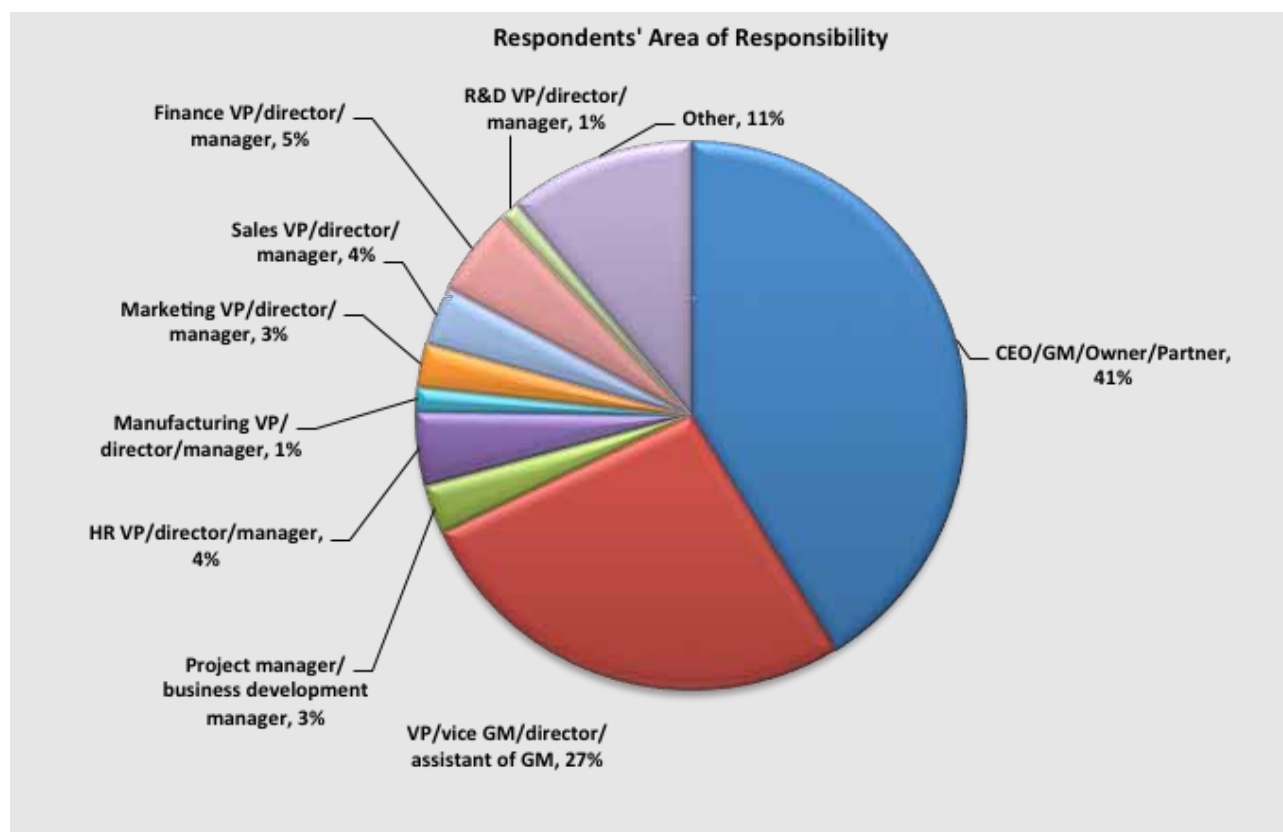
中欧国际工商学院研究团队  
2012 年 1 月

# LETTER FROM THE RESEARCH TEAM

The Chinese Executives Survey is a research project launched by the faculty team of China Europe International Business School (CEIBS) every year. This is the second year. The purpose is to better understand the business environment and business challenges of Chinese companies.

The survey covers a broad range of questions, including company information, financial performance, business strategy, human resources, marketing and competition, challenges and business outlook. It is to be conducted annually among CEIBS alumni and EMBA students.

At the end of October 2011, all CEIBS alumni and EMBA students were invited to anonymously answer an online questionnaire in Chinese with the help of the Alumni, EMBA and EDP Offices. The responses were received during the period from the end of October to the end of November 2011. In total, 348 respondents completed the survey. Of those that participated, 68 percent identified themselves as senior-level manager, 59 percent identified themselves as department director or functional leader. About 92 percent of the respondents have more than 10 years of working experiences, and 78 percent of the respondents are male.



The 'Other' category includes sales representatives, COO, senior manager, etc.

We would like to thank all who have helped with this research. Firstly, we would like to thank CEIBS for its official support. We would also like to thank the Alumni, EMBA and EDP offices for their help. Last but not least, we would like to express our appreciation to all alumni and EMBA students who responded to the survey. This research would not have been so successful without them. Our gratitude goes out to you all.

CEIBS Research Team,  
Jan, 2012

# 研究团队介绍



范悦安教授

**范悦安博士 (Juan A. Fernandez)** 是中欧国际工商学院管理学教授。

他是以下 6 本书的作者：《中国 CEO》，《中国国有企业的改革》，《中国 CEO 指南》，《中外企业家》，《中国企业家》，《2010 年在华企业运营调研》。他在美国、印度、日本、韩国、英国、法国、意大利和西班牙就他的中国企业研究发表演讲。



周东生教授

**周东生博士** 是中欧国际工商学院市场营销学教授，副教授长（负责校友事务），清华 - 中欧 - 哈佛高层经理培训项目的学术主任。周博士在加拿大不列颠哥伦比亚大学商学院获得博士学位。

周博士的研究侧重于营销战略、博弈论、跨国企业的中国战略、和中国民营企业。周博士的研究成果发表于多种英美学术刊物，如《管理杂志评论》、《国际商业评论》、《国际营销评论》等。周博士还曾为多家公司（如 IBM、杜邦等）作咨询。



陈丽佳研究员

**陈丽佳** 是中欧国际工商学院助理研究员，同时也是新加坡管理大学研究员。她在同济大学获得管理学硕士学位。

陈丽佳的研究领域是管理数量方法，中国式的管理方式，新加坡服务业研究。曾参与多部社会保障体系管理丛书的编写。研究成果发表于《财经界》等学术期刊上。



李俊骏研究员

**李俊骏** 是中欧国际工商学院助理研究员。她在华东师范大学获得文学学士学位。

李俊骏的研究领域是营销战略，协助撰写了多个教学案例并参与了多个公司咨询项目。

# The Research Team



Prof. Juan Antonio Fernandez

**Dr. Juan Antonio Fernandez** is Professor of Management at China Europe International Business School (CEIBS), in Shanghai, China.

Prof. Fernandez has co-authored six books: CHINA CEO, Chinese SOEs Reform, China CEO: A Field Guide, China (Foreign) Entrepreneur, Chinese Entrepreneurs, and 2010 Doing Business in China Survey. He has given presentations about his Chinese research in U.S.A, India, Japan, Korea, UK, France, Italy and Spain.



Prof. Dongsheng Zhou

**Dr. Dongsheng Zhou** is Professor of Marketing and Associate Dean (in charge of Alumni) at CEIBS. He is also the academic director of SEPC, a joint executive training program with Harvard Business School and SEM with Tsinghua University. Dr. Zhou received his Ph.D. from the Faculty of Commerce and Business Administration, University of British Columbia (UBC), Canada.

Dr. Zhou's research focuses on marketing strategies, game theory, MNE strategies in China and China's private enterprises. His research has been published in the Academy of Management Review, the International Business Review, International Marketing Review, and others. Dr. Zhou has conducted consulting services for a number of firms (e.g., IBM, DuPont).



Lijia Chen

**Lijia Chen** is Research Associate at CEIBS. She is also Research Associate in Singapore Management University. She got her Master of Management from Tongji University.

Her research focuses on the quantitative methods in management, Chinese management systems, and business environment in Singapore's service industry. She is involved in writing books on Social Security Management. Her research has been published in the Journal of Money China, and others.



Junjun Li

**Junjun Li** is Research Assistant at CEIBS. She got her Bachelor of Art from East China Normal University.

Her research focuses on marketing strategies. She has written several cases and been involved in various consulting projects.

# 第一部分

## Section I

### 公司背景

## COMPANIES INCLUDED

这部分介绍了参与问卷调查的公司的详细情况，旨在使读者大致了解参与调查的公司的类型。内容如下：

- 总部所属省市
- 成立时间
- 在国内员工数量
- 登记注册类型
- 国内业务活动：制造业或者服务业，B2B 或者 B2C

This section details the following information about the companies that participated in the on-line survey:

- Location of companies' headquarters in China
- Years of operation
- Number of employees in China
- Legal form
- Business activity in China: manufacturing or service, B2B or B2C

The purpose of this section is to give a general overview of the type of companies included in the survey.

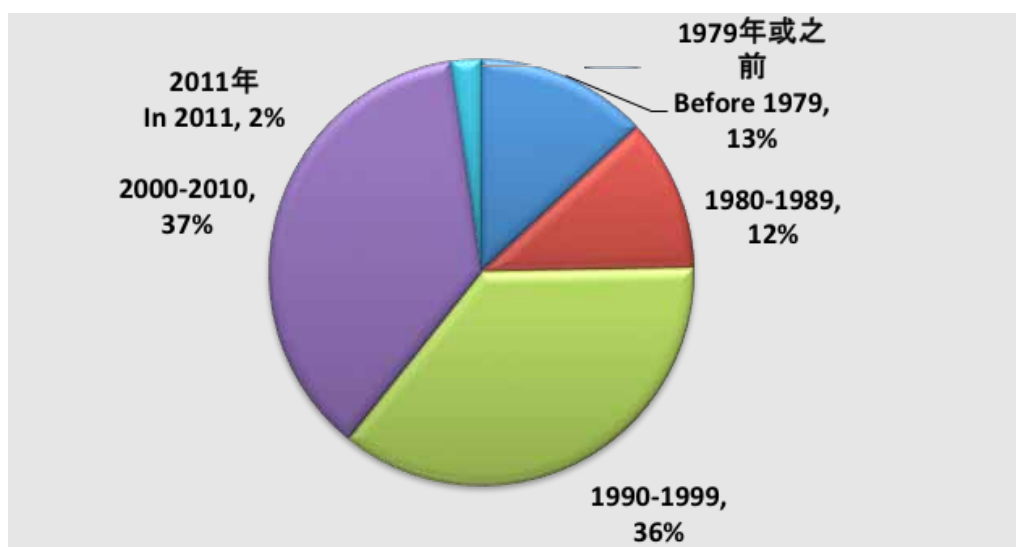


大多数受访公司成立于 1990-1999 年之间 (36%) 及 2000-2010 年之间 (37%)。(表 I.1)

Most of the companies in our sample were established either between the years 1990-1999 (36%) or between the years 2000-2010 (37%). (Chart I.1)

**Chart I.1 贵公司成立于哪一年? (N=344)**

**When was your company established?**



31% 的受访公司总部设在上海, 16% 设在北京, 10% 设在江苏, 10% 设在广东 (不包括深圳)。(表 I.2)

Of the companies surveyed, 31% have their headquarters in Shanghai, 16% in Beijing, 10% in Jiangsu and 10% in Guangdong (excluding Shenzhen). (Chart I.2)

**Chart I.2 贵公司总部设在省(市)? (N=341)**

**The headquarters of your company is located in?**

答案 / Answer	人数 / Response	比例 / %
上海 Shanghai	107	31%
北京 Beijing	54	16%
江苏 Jiangsu	35	10%
广东 Guangdong	33	10%
深圳 Shenzhen	24	7%
浙江 Zhejiang	19	6%
香港 Hong Kong (S.A.R.)	10	3%
安徽 Anhui	7	2%
天津 Tianjin	7	2%
重庆 Chongqing	6	2%
山东 Shandong	6	2%
四川 Sichuan	6	2%
其他 Other provinces	27	7%

“其他”包括：甘肃，湖北，湖南等。The "other" category includes: Gansu, Hubei, and Hunan, etc.

42% 的受访公司 (144 个) 有 1-500 个员工, 其余的 58% (197 个) 为员工人数超过 500 人的组织。 这表明了我们的调研样本中大型小型企业数量是均匀分布的。(表 I.3)

Amongst the companies researched, 42% of them (144 respondents) have 1 to 500 employees in China. The rest, 58% (197 respondents), are organizations with more than 500 employees. This means that our sample shows an almost equal balance between SME (small medium size) and large organizations (Chart I.3).

**Chart I.3 贵公司有多少员工? (如果贵公司是外商独资企业或合资企业, 该问题只涉及在中国的员工规模。) (N=341)**

**How many employees does your company have? (If your company is foreign-owned or Joint Venture, just indicate the employee number in China.)**

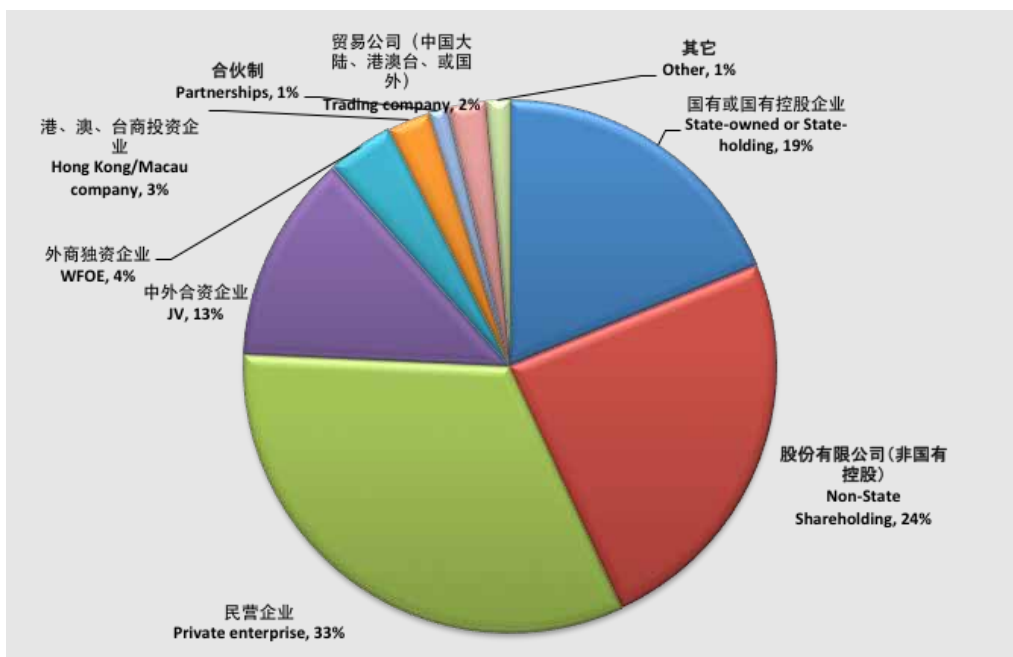
员工数 Employees	回答 Response	%
1-500	144	42%
>500	197	58%
总数 TOTAL	341	100%

大多数受访企业的登记注册类型为民营企业 (33%) 和股份有限公司 (24%)。(表 I.4)

Regarding the legal form adopted (Chart I.4), the majority are private enterprises (33%) and non-state shareholding (24%). (Chart I.4)

**Chart I.4 贵公司目前的登记注册类型是? (N=346)**

**What is your company's current legal status?**



53% 的受访者来自服务业，47% 的受访者来自制造业。(N=348)

53% of the respondents declared that the main activity of their companies is in services, 47% in manufacturing.

表 I.5 进一步分析了制造业企业的细分行业，前三名分别是机械及设备制造，轻型消费品以及汽车。

Chart I.5 reveals more specific information on the type of industry. The top three main manufacturing industries are machinery & equipment, light consumer goods and automotive.

### Chart I.5 贵公司所属细分行业是：

#### What is the main industry you are active in?

答案 /Answer	人数 /Response
机械及设备制造 Manufacturing of Machinery & Equipment (excluding instruments & lab equipment)	31
轻型消费品（消费电子、家用电器、玩具、自行车、家具等） Light Consumer Goods (consumer electronics, household appliances, toys, bicycles, furniture, etc.)	22
汽车 Automotive	19
通信设备、计算机及其他电子设备的制造（硬件） Telecommunication & IT (hardware)	18
石化、橡胶、塑料等 Chemical, petroleum, gas	15
制药 Pharmaceuticals	15
纺织、服装、皮毛 Apparel & Toiletries (Clothing, accessories, toiletries, and etc.)	13
农副食品加工、食品和饮料制造 Food & Dietary supplement	8
建筑和土木工程 Construction and Civil Engineering(incl. materials of construction and building)	6
医疗设备及健康护理产品（不包括药品） Medical Equipment & Health care Products (Excl. Pharmaceuticals)	6
电力、燃气及水的生产和供应 Energy & Utilities (Power, Gas, Water and etc.)	6
黑色金属、有色金属冶炼及压延，非金属矿物制品 Material & Commodities Production (Steel & Metals, Plastics)	3
仪器仪表及文化、办公用机械制造 Manufacturing of Testing Measurement & Scientific Instruments; Laboratory equipment	3
造船 Shipbuilding	4
快速消费品 FMCG	3
采矿业（煤炭、石油、天然气、金属和非金属开采） Mining	2
铁路、地铁 Railway & Metro	2
文教体育用品制造 Entertainment & Educational products (books & magazines, DVDs, CDs, games, and etc.)	1
奢侈品（高档手表、时装、首饰、化妆品、烟酒等） Luxury (watches, fashion, jewelry, cosmetics, wines, etc.)	2
废弃资源和废旧材料回收加工 Waste Management, Recycling & Clean Technologies	1
其他 Other	18

“其他”包括：电池材料，环境保护，电气产品等。

The "other" category includes: battery material, environmental protection, electrical products, etc.

服务业企业的前三名主要集中在批发和零售，金融以及房地产。（表 I.6）

Regarding service (Chart I.6), the most common activities are wholesale and retail, financial services and real estate.

**Chart I.6 贵公司提供的服务主要是什么类型？**  
**What is the main type of services that your company is providing?**

答案 /Answer	人数 /Response
批发和零售 Wholesale and retail	26
金融 Financial services (Banking, insurances, investment, etc.)	19
房地产 Real Estate	15
咨询（战略、人力资源、法律等） Consulting (Strategy, HR, legal, investment, etc.)	15
工程和设计 Engineering & design	12
软件 Software	12
进出口贸易 Trading Export/Import	9
因特网，电子商务（B to B, B to C） Internet, and E-business(B to B, B to C)	7
物流、仓储等 Distribution and logistics	6
教育 Education	6
公关服务，广告，媒体，出版等 PR, advertisement, media, publishing, etc.	5
医疗卫生 Medical and wellness	4
电信服务 Telecom services	4
交通运输（航空、铁路、道路、城市公交等） Transportation (Air companies, bus, train, etc.)	4
住宿、餐饮、娱乐 Restaurants, bars, entertainment	1
旅游 Tourism	12
其他 Other	

“其他”包括：技术服务，投资管理，IT 服务等。

The "other" category includes: Technical services, investment management, IT service ,etc.

68% 的受访者的客户是商业客户（B2B），32% 的受访者的客户是个人客户（B2C）。(N=348)

68% of the respondents indicated that their majority of their clients are other businesses (B2B), and 32% are consumers (B2C).

# 第二部分

## Section II

### 业绩与挑战

## BUSINESS PERFORMANCE AND CHALLENGES

在这部分，读者可以了解参与调研的公司的业绩，目前和未来面临的挑战，以及公司如何应对这些挑战。主要内容如下：

- 中国市场信心指数
- 中国市场销售收入 - 过去以及现在
- 盈利性
- 未来期望
- 目前公司运营出现的主要问题以及可能的应对方案
- 未来几年将面临的挑战
- 成功因素

This section gives information about the business performance and the challenges faced by the companies interviewed such as:

- Confidence in the Chinese market
- Sales revenue in China - past and present
- Profitability
- Future expectations
- Major difficulties of running their businesses and possible solutions
- Main challenges expected in the coming years
- Success factors

The purpose of this section is to understand the major problems faced by these companies and how they respond to them.

## II.1. 信心指数与 2011 经营业绩

### Confidence Index and Business Performance in 2011

大部分受访公司对未来在中国的运营还是很有信心。2011 年他们在中国市场上获得了丰厚的销售收入和利润。据调查，他们认为在中国这个多变的市场上要想取得成功，关键是要有一支称职的管理队伍并在研发和创新方面不断投入。卓越的人力资源管理如有效的绩效和激励体系，较强的企业文化和价值，有效选拔，招聘，留住人才等都是企业在中国市场上对抗竞争的有效法宝。但是真正实行起来很不容易。原材料价格以及人力成本的上涨使中国企业丧失了成本优势，被迫将发展重心转向创新，研发以及其它能使企业增值的活动。

The majority of the respondents are very confident about their future in China. They make substantial revenues in the Chinese market and healthy profits. According to them, the key success factor in developing their businesses in this dynamic market place is to have a qualified management team and invest in innovation/R&D. Excellent HR management for example good performance and incentive systems, strong company culture and values, recruiting, training and retaining key employees, are essential factors in outperforming the competition in the China - yet they are difficult to execute. Rising cost in labor and raw materials indicates the lost of cost advantage and forces them to shift focus to innovation/R&D and other value-added activities.

总得来说，大多数受访公司对未来，尤其是未来 5 年在中国的运营，比较有信心。（表 II.1.1）

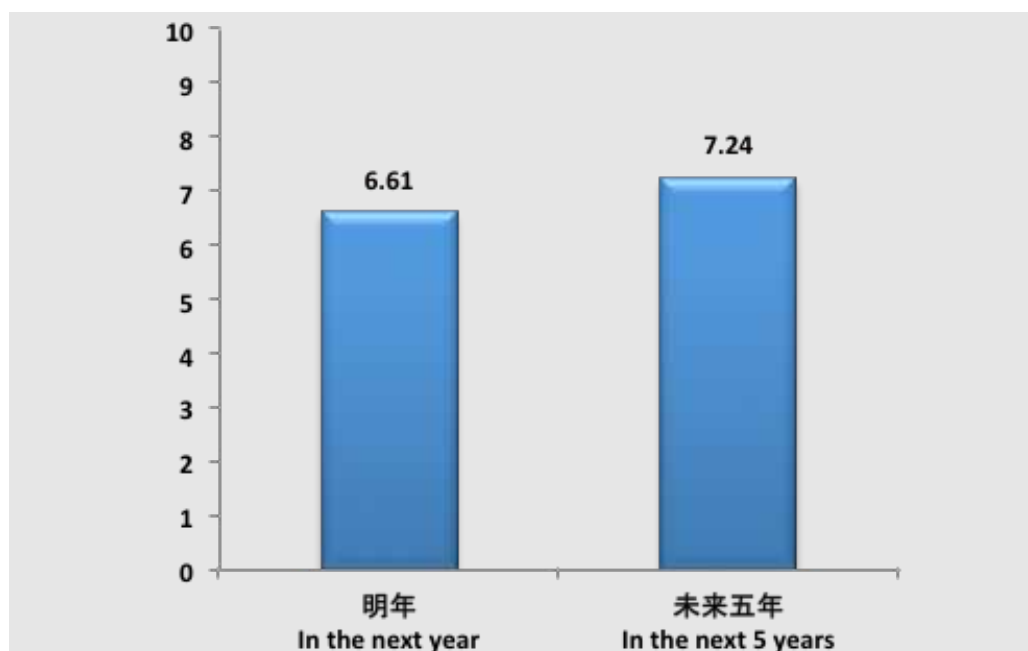
Broadly speaking, most of the companies interviewed remain confident about their future in China, especially over the next five year period. (Chart II.1.1)

#### Chart II.1.1 您预期贵公司在明年以及未来 5 年的运营会非常成功吗？ (N=348)

(0 代表非常悲观，5 代表中性，10 代表非常乐观)

How confident are you that your operations will be successful in the next year, and in the next 5 years?

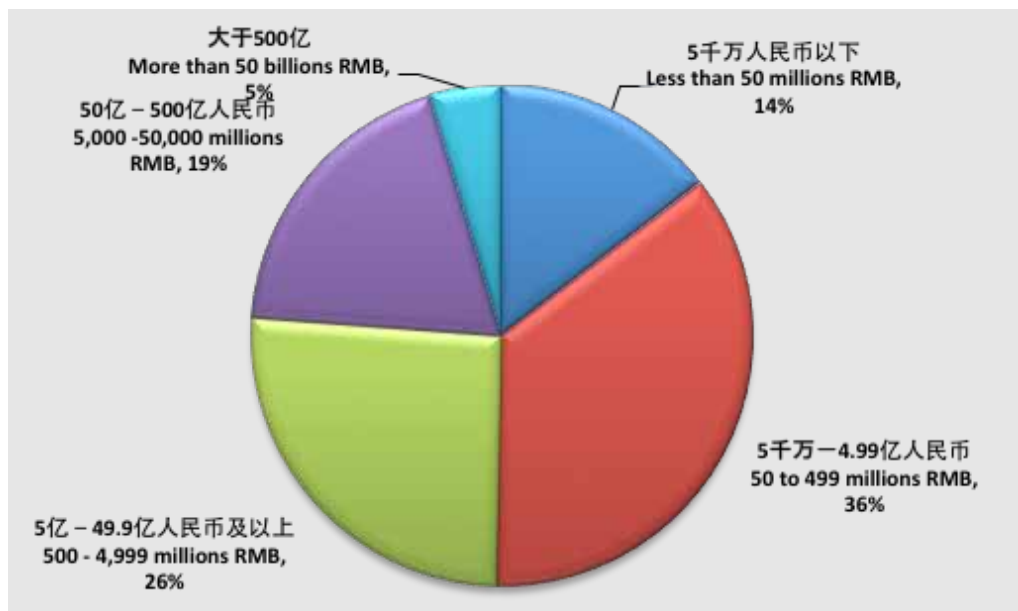
(0-very pessimistic, 5-neutral, 10-very optimistic)



50% 的受访公司 2011 年销售收入在 4.99 亿人民币以下，26% 在 5 亿到 49.9 亿人民币之间，19% 在 50 亿到 500 亿人民币之间，只有 5% 的公司销售收入大于 500 亿。(表 II.1.2)

Regarding their sales in 2011, 50% of the respondents declared annual revenues of up to 499 million RMB, and 26% declare revenues between 500-4,999 million RMB. Only 5% of the companies noted more than 50 billion RMB of revenues (Chart II.1.2).

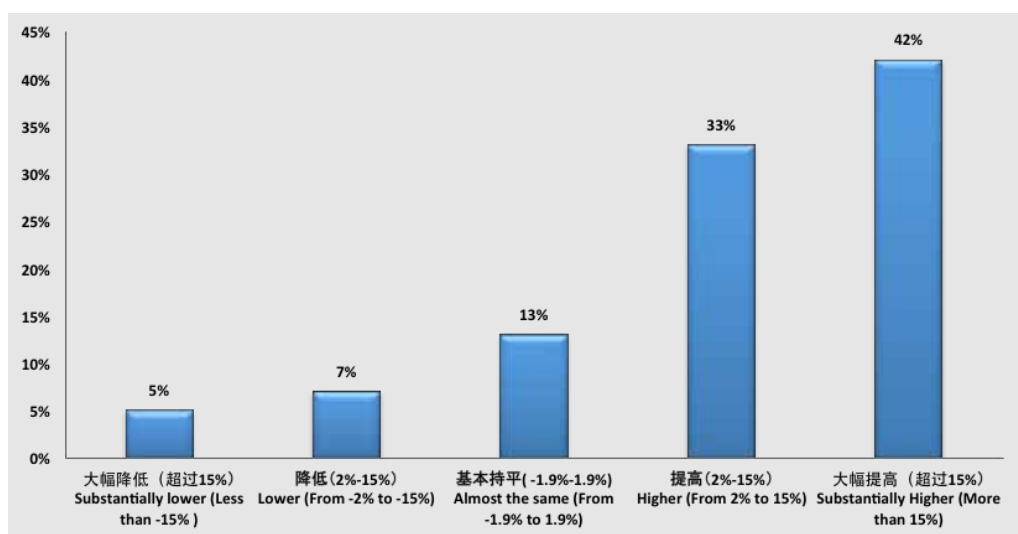
**Chart II.1.2 贵公司 2011 年的销售收入预计将达到 (N=344):**  
Your company's expected sales revenue in 2011 is:



2011 年，75% 的受访公司的销售收入比 2010 年增加 (33%) 或者大幅增加 (42%)。大多数公司对未来持乐观态度，12% 的公司的销售收入与 2010 年相比减少 (7%) 或者大幅减少 (5%)。(表 II.1.3)

75% of the companies we interviewed had, in 2011, higher (33%) or substantially higher (42%) revenues than that of 2010. Most companies in our sample were optimistic about the future and 12% of the companies had lower (7%) or substantially lower (5%) revenues in 2011 (Chart II.1.3).

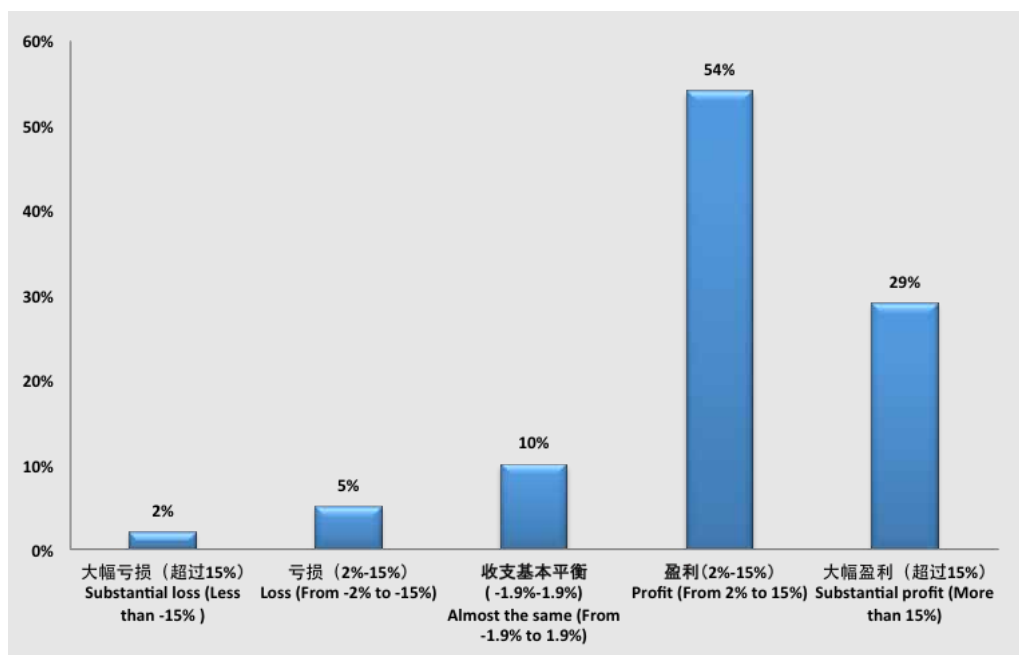
**Chart II.1.3 贵公司 2011 年销售收入预期将比 2010 年 ? (N=345)**  
Your company's expected revenue in 2011 compared to 2010 is?



绝大多数的受访公司（83%）2011年是盈利的。10%达到收支平衡，只有2%出现大幅亏损。另外，有29%的公司的毛利率超过15%。总体来说，受访公司在中国市场的盈利性很好。（表 II.1.4）

The majority of companies in our survey (83%) made profits in 2011. 10% broke-even whilst only 2% of the respondents declared substantial loss. On the other hand 29% of respondents stated profits of over 15%. As a whole, it is clear that the Chinese market environment is very profitable for our sample companies (Chart II.1.4).

**Chart II.1.4 贵公司在 2011 年的预期盈利情况是？(N=347)：**  
**Your company's expected profitability in 2011 is?**





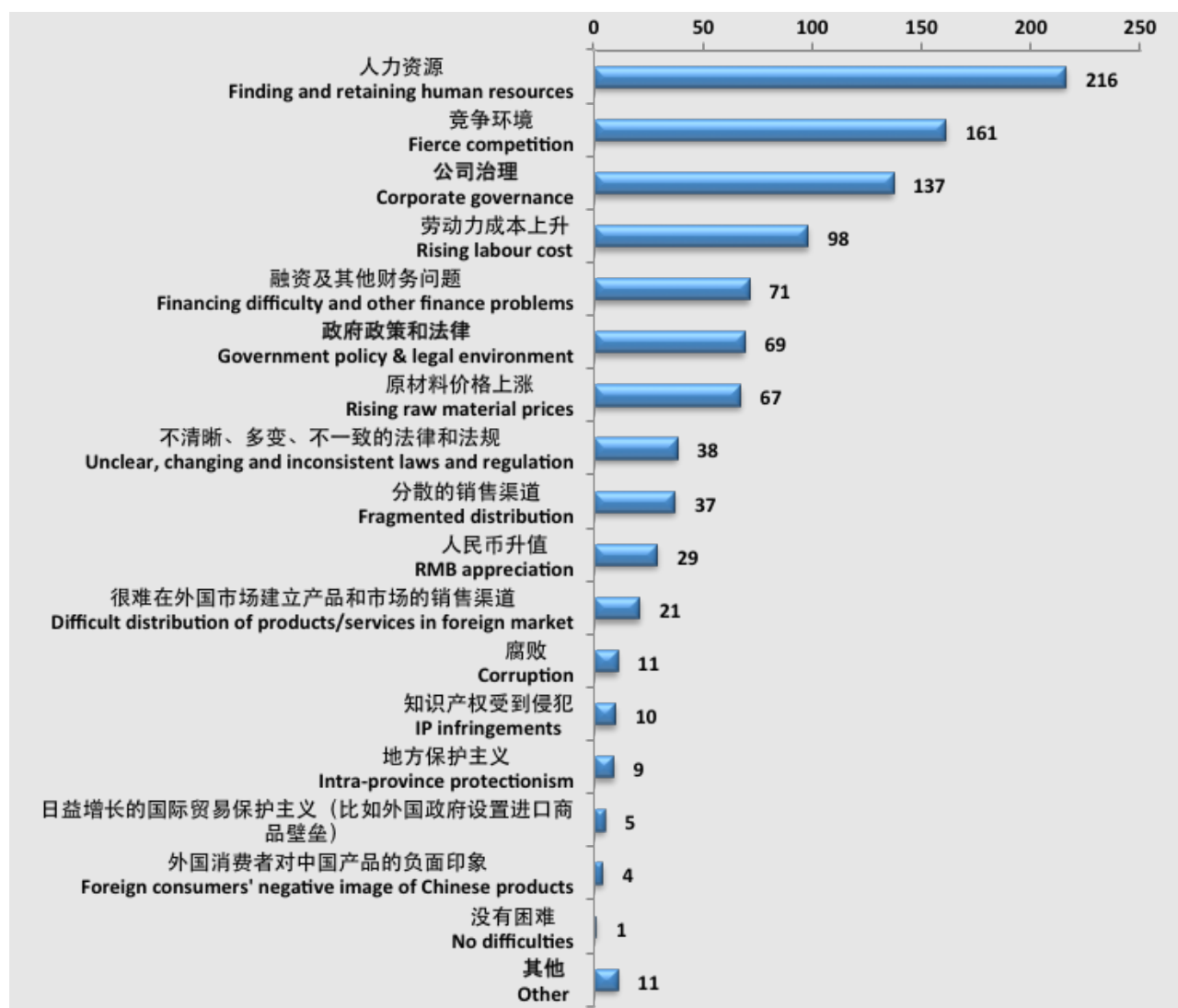
## II.2 挑战与成功因素

### Challenges and Success Factors

大部分受访公司在 2011 年面临的挑战与 2010 年类似。人力资源管理仍然是首要问题。总的来说，员工流动率较高，使他们符合岗位要求有一定难度，对新进员工经常进行培训的需求很大。这些都给公司带来了额外的负担。除了人力资源方面的问题，公司还面对着激烈的竞争。面对人力成本和原材料成本上涨的情况，中国公司需要寻求价格战以外的竞争方式。同时，公司治理也是受访公司认为比较重要的问题。（表 II.2.1）

The majority of the companies that we interviewed faced the similar challenges in 2011 as in the 2010 survey. HR management continues to be the top issue. In general, employee turnover is high, there is difficulty in consolidating them into their roles, and demand for frequent training of incoming employees is high. This creates an extra burden on companies. Apart from the HR problem, competition is seen as fierce by our respondents. While the cost of labor and raw materials is rising, Chinese companies need to find other ways to compete other than competing by price. Corporate governance is also a major problem for all companies interviewed. (Chart II.2.1).

**Chart II.2.1 在目前的经营过程中，贵公司面临的困难和挑战主要集中在哪些方面？**  
**What is presently causing you the most difficulty in running your company?**



“其他”包括：缺少劳动力，国有企业垄断等。The "other" category includes: lack of labor, monopoly of the state-owned enterprises, etc.

为了应对上述挑战，受访公司将重点主要放在三大领域：商业模式的转型或者升级，人力资源管理以及创新。受访企业转换商业模式，基于核心竞争力，将战略重新聚焦于满足客户期望。其次，受访企业利用宝贵的人力资源管理经验挽留重要人才。最后，受访企业着重关注产品、技术创新，以更好地满足市场需求，并在可能的情况下降低成本。(表 II.2.2)

In order to address these challenges, our interviewees focus their efforts mostly around three major areas: business model transformation, HR and innovation. The respondents work on transforming their business models, refocusing their strategy to meet customer's expectations based on their core competencies. Secondly, they work on fostering valuable HR practices to retain key talent. Lastly, they pay attention to product/technology innovation so as to better meet market needs whilst, in some cases, decreasing costs. (Chart II.2.2).

**Chart II.2.2 贵公司如何应对上述挑战？**  
**How do you respond to the above challenges?**

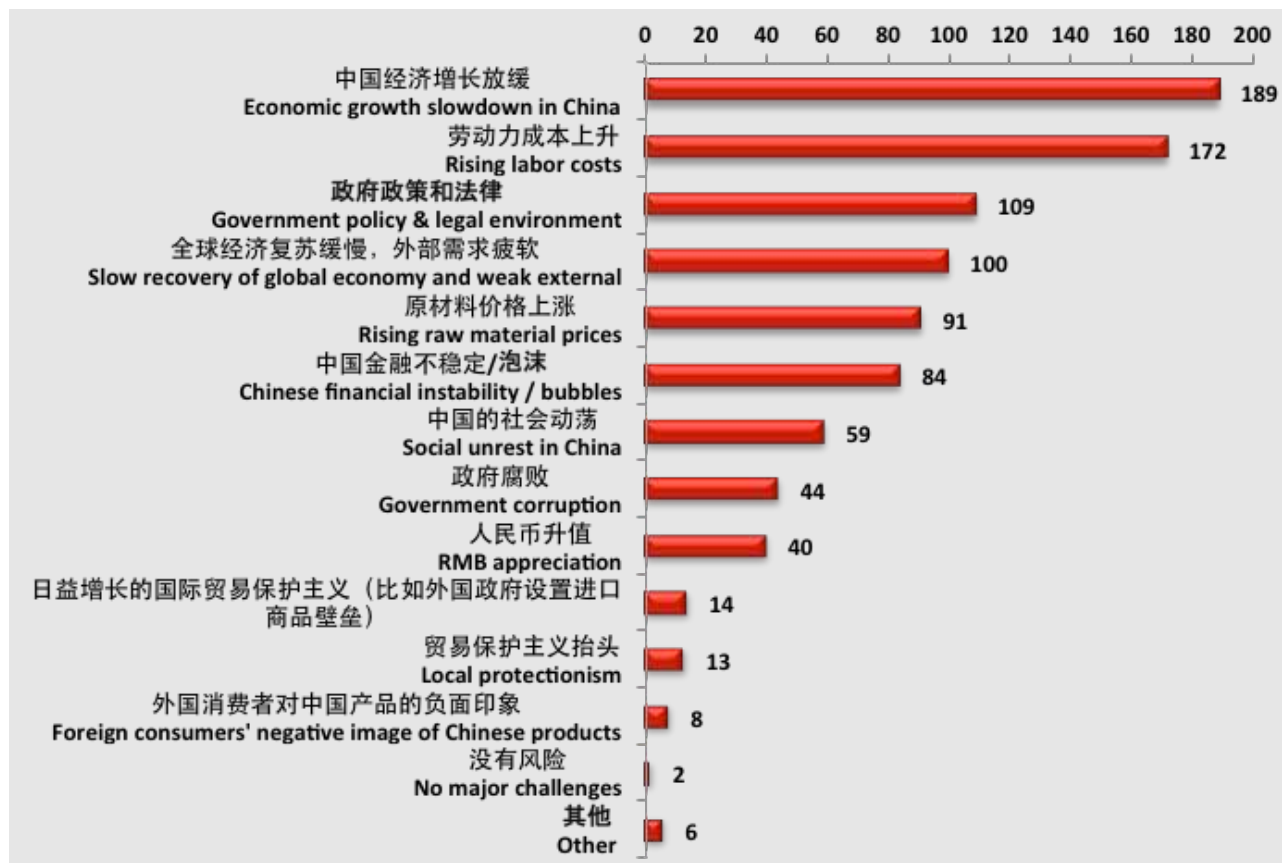


“其他”包括：融资，开发新产品，加强制度流程建设和规范化管理等。The "other" category includes: financing, new product development, etc.

被问及未来外部风险时，大多数受访公司认为经济增长放缓和劳动力成本上升对他们影响很大。有趣的是，人民币升值和政府腐败在这个排序中位置靠后。(表 II.2.3)

When we asked them about the future, most companies interviewed saw rising labor costs and the economic slowdown as the major challenges for their companies in the coming years. Interestingly, RMB appreciation and government corruption occupy some of the lowest positions in this ranking according to our respondents (Chart II.2.3).

**Chart II.2.3. 您认为，在未来几年中，贵公司面临的主要外部风险有哪些？**  
**Which are the main challenges facing your company in the coming years?**



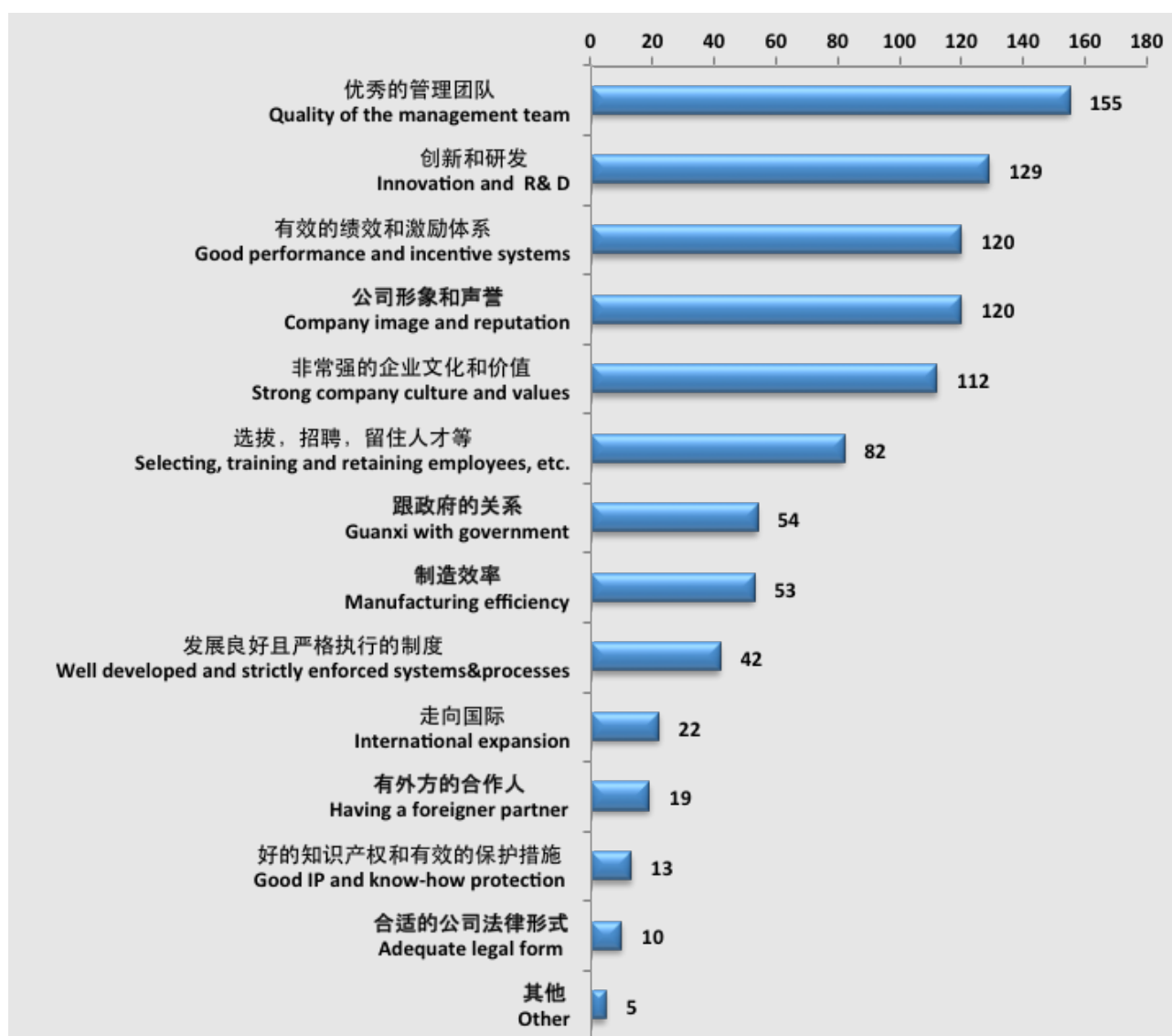
“其他”包括：资本市场发生变化，行业无序竞争，盲目扩张风险等。

The "other" category includes: change in capital market, disordered competition, risk of expansion, etc.

对大多数受访公司而言，在中国取得成功的关键因素和人有关。具体来说，他们强调了优秀的管理团队（排在第一位）以及有效的绩效和激励体系（排在第三位）。创新和研发排在第二位，这说明中国公司已经意识到必须获得低成本之外的竞争能力。公司声誉以及非常强的企业文化和价值也是成功的重要因素。（表 II.2.4）

According to the majority of the companies interviewed, the most critical factors for their company to succeed in China are related to people. Specifically they highlighted quality of the management team (1st place) and the good performance and incentive systems (3rd place). Innovation and R&D occupies the second place and it indicates that Chinese companies have realized the importance of gaining new competencies other than low cost. Reputation and strong company culture and values are also key factors for success (Chart II.2.4).

**Chart II.2.4. 下面哪些因素是贵公司在华取得成功的因素？**  
**How important were these factors for your company's success in China?**



“其他”包括：商业模式，需求的快速增长，垄断等。The "other" category includes: business model, fast growth of needs, monopoly, etc.

# 第三部分

## Section III

### 经营环境

### BUSINESS ENVIRONMENT

在这部分，读者可以从以下两方面了解受访公司所处的商业环境，理解公司运营的具体外部因素：

- 市场竞争：强度以及类型，受访公司的竞争优势以及在竞争中面临的主要问题
- 政府政策：政策的影响，公司满意度，对腐败以及其他问题的看法，以及“关系”的重要性。

This section includes information about the business environment in which these companies operate, from two different perspectives:

- **Market competition: degree and type of competition, the competitive advantages of our respondents, and the main concerns about competition.**
- **Government policies: its impact, the degree of satisfaction, views on corruption, other major issues, and the importance of “guanxi” .**

The purpose of this section is to give an understanding of the specific issues related to the external environment within which these companies conduct their business.

## III.1 市场竞争

### Market Competition

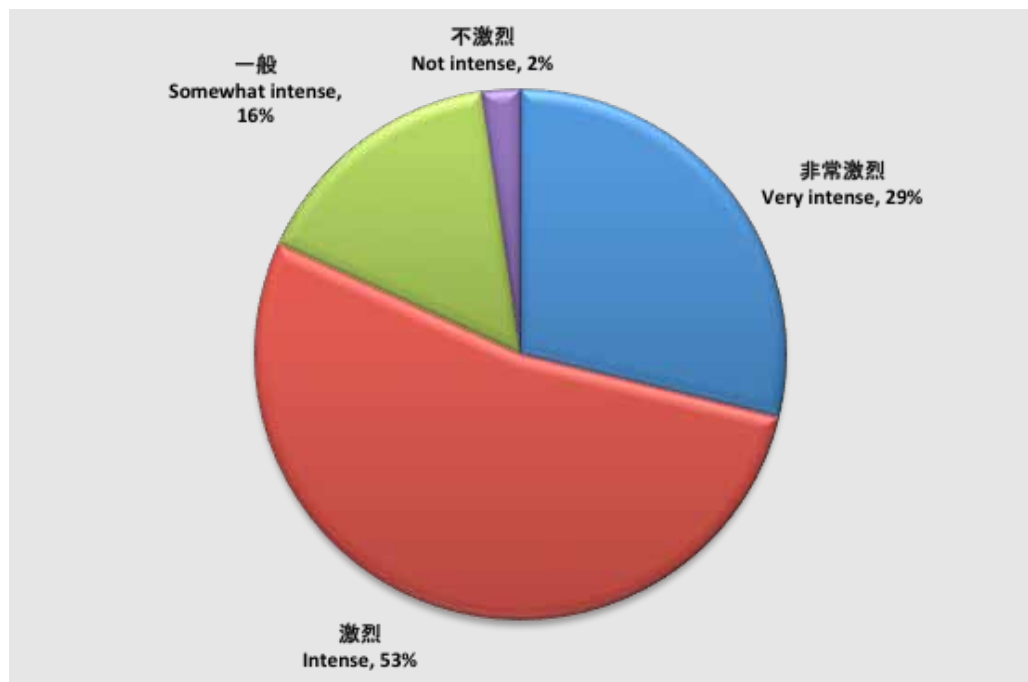
多数受访者认为中国市场上竞争很激烈，他们的主要竞争对手是中国本地公司。

Most respondents agree that the competition in China is fierce. They consider their major competitors to be Chinese local companies.

受访者中，82% 认为中国的竞争激烈（53%）或者非常激烈（29%）。（表 III.1.1）

In our sample, 82% of the respondents agreed that competition in China is intense (53%) or very intense (29%). (Chart III.1.1).

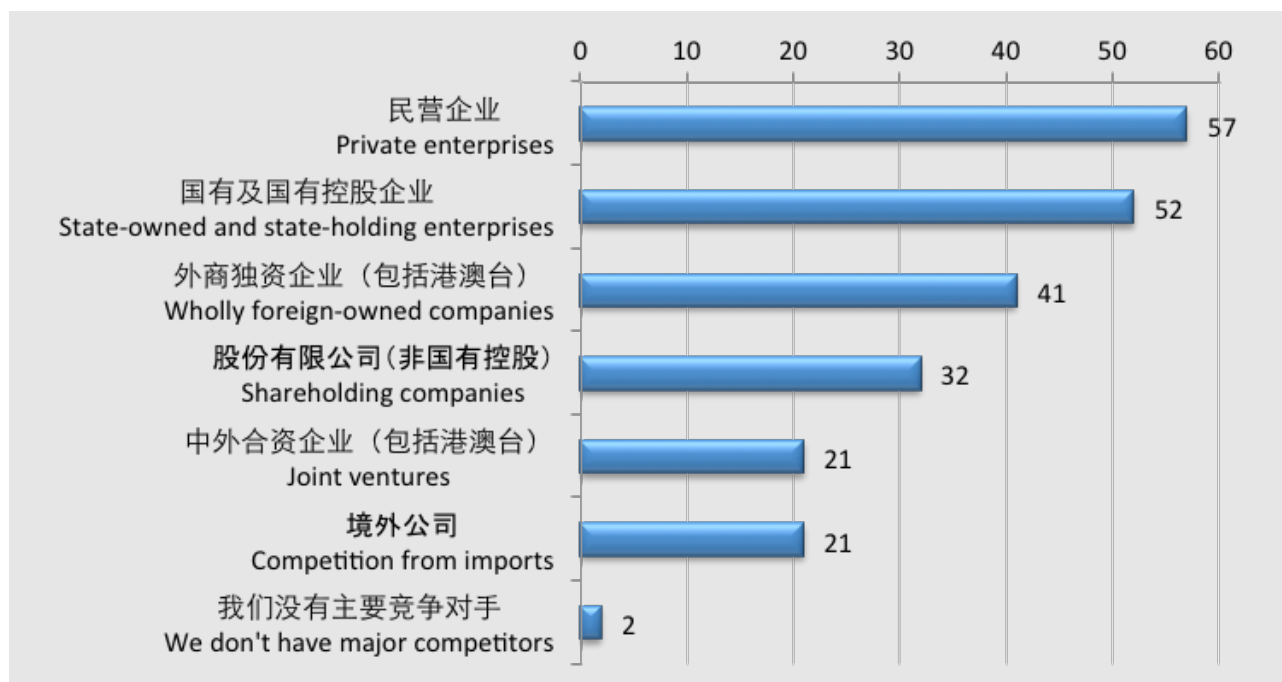
**Chart III.1.1 贵公司在中国的竞争程度如何？ (N=347)**  
**What is the degree of competition facing your company in China?**



受访公司指出最主要的竞争对手为民营企业，其次是国有及国有控股企业。在同一市场上成长起来的公司对客户有相似的理解，并分享相似的资源。他们应该从差异化寻找出路。这就解释了为什么创新和研发在成功因素排名中位列第二。(表 III.1.2)

Our executives point to private enterprises as their number one competitors, followed by state-owned and state-holding enterprises. Companies grown in the same market share the similar understanding of customers and similar resources. They ought to look for ways out by differentiation. This explains they put innovation and R&D high in the list of success factors. (Chart III.1.2).

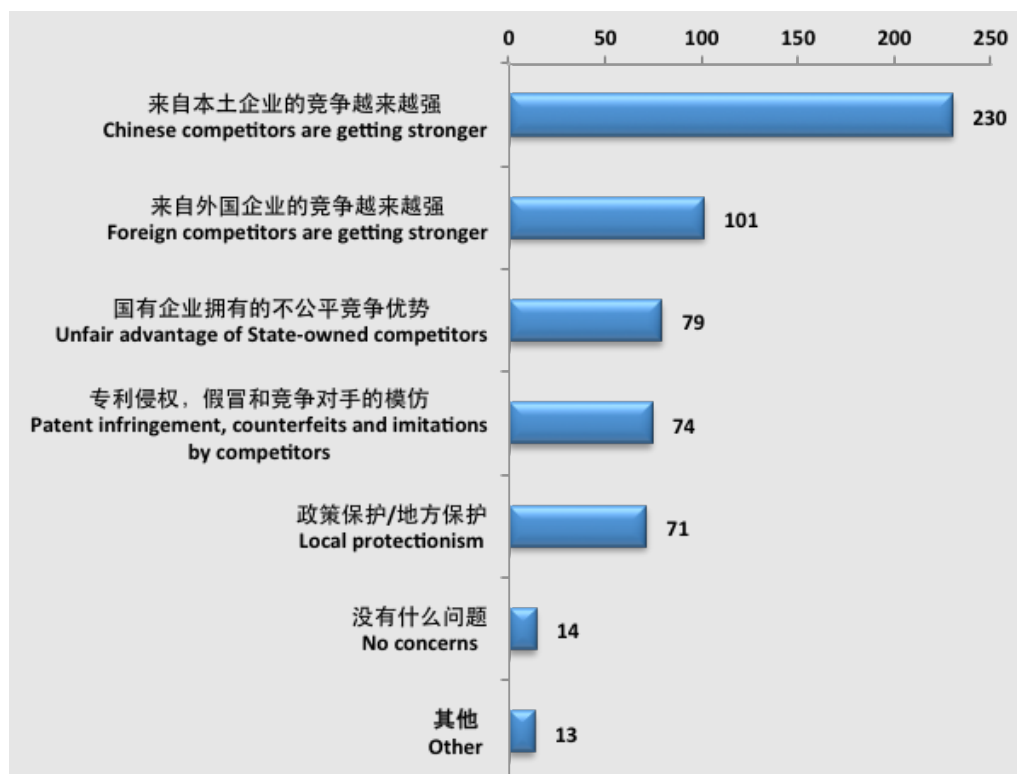
**Chart III.1.2 贵公司的主要竞争对手属于下列哪一类型?**  
**Who are your major competitors in China?**



本土企业的不断强大很显然成为受访公司的首要问题。而且在中国的外国对手也越来越具竞争力。受访公司对国有企业拥有的不公平竞争优势以及地方保护主义也表示了一定的忧虑。同时专利侵权对他们也是重要问题。政府在这些领域应该有所作为。(表 III.1.3)

The increasing strength of Chinese competitors is clearly identified as a main concern by our respondents. And foreign competitors have become more and more competitive too. Companies interviewed showed concerns towards unfair advantage of state-owned companies and local protectionism. Patent infringement is also problematic for them. These are the areas that government needs to work on.(Chart III.1.3).

**Chart III.1.3 在市场竞争方面，贵公司面临的主要问题是什么？**  
**What are your main concerns regarding competition?**



“其他”包括：快速发展与管理能力的匹配，不规范市场竞争环境等。

The "other" category includes: Gap between the rapid development and the ability of management, lack of regulation in market competition, etc.



## III.2 政府政策

### Government Policies

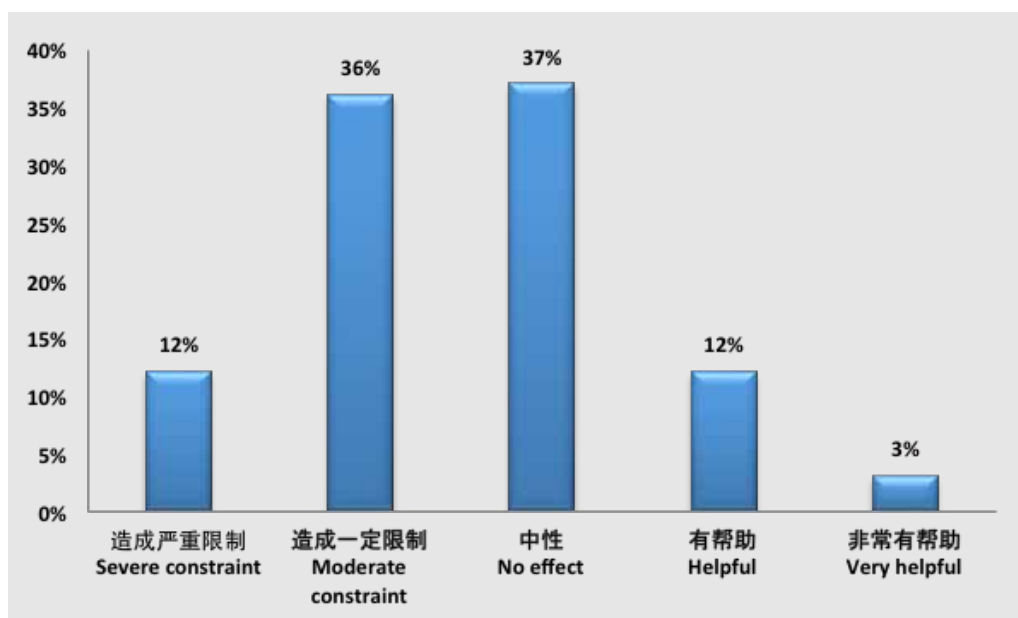
大概有一半的受访公司认为政府政策对公司经营造成了限制。超过 60% 的受访公司对实施的政策不满意。虽然大家普遍认为腐败问题在中国仍然存在，并对公司经营产生一定影响，但对受访公司来说，腐败并不是首要问题。宏观经济政策的调整，国进民退的发展以及经常变动的法律法规才是他们的首要问题。与政府保持良好关系对受访公司的发展非常重要。

Almost half of the respondents perceive Chinese government policies as a constraint to the development of their businesses, and more than 60% of the sample is unsatisfied with the policies implemented. Although corruption is still considered a problem in China which affects their business activity, it is not flagged as the main concern. Macroeconomic policy adjustments, as well as, increased government involvement in the economy and unclear and inconsistent changes in legal regulations are noted as major problems. Government relationships are seen as essential for the development of their business activities.

48% 的受访公司认为政府政策和管制对企业经营起到负面作用。36% 认为对公司经营造成一定限制而 12% 认为造成严重限制。另外还有 15% 持相反意见，他们认为政府政策对企业发展是有帮助的。（表 III.2.1）

The effect of Chinese policies and regulations is perceived negatively by 48% of our respondents, with 36% declaring that it is to some extent an impediment, whilst 12% of them claim that it is a severe constraint. On the other hand 15% of them argue that Chinese policies are helpful for the deployment of their activities (Chart III.2.1).

**Chart III.2.1 政府政策和管制对贵公司的经营起到了什么作用？ (N=343)**  
**What is the effect of the government policies and regulations on your industry?**

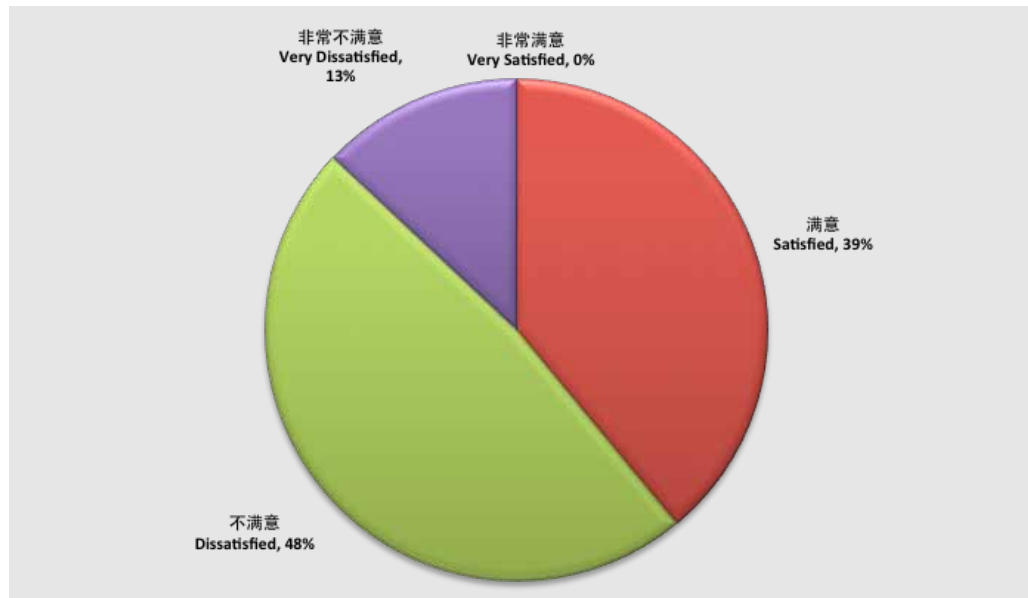


当问及对政府服务的满意程度时，受访公司中不满意的多于满意的。有 13% 甚至非常不满意，而非常满意的为零。（表 III.2.2）

Regarding satisfaction with Chinese government services, more respondents are dissatisfied than satisfied. There are 13% of them are very dissatisfied while no one is very satisfied. (Chart III.2.2).

**Chart III.2.2 您对政府办事效率是否满意？ (N=344)**

**Are you satisfied with the services government provides?**

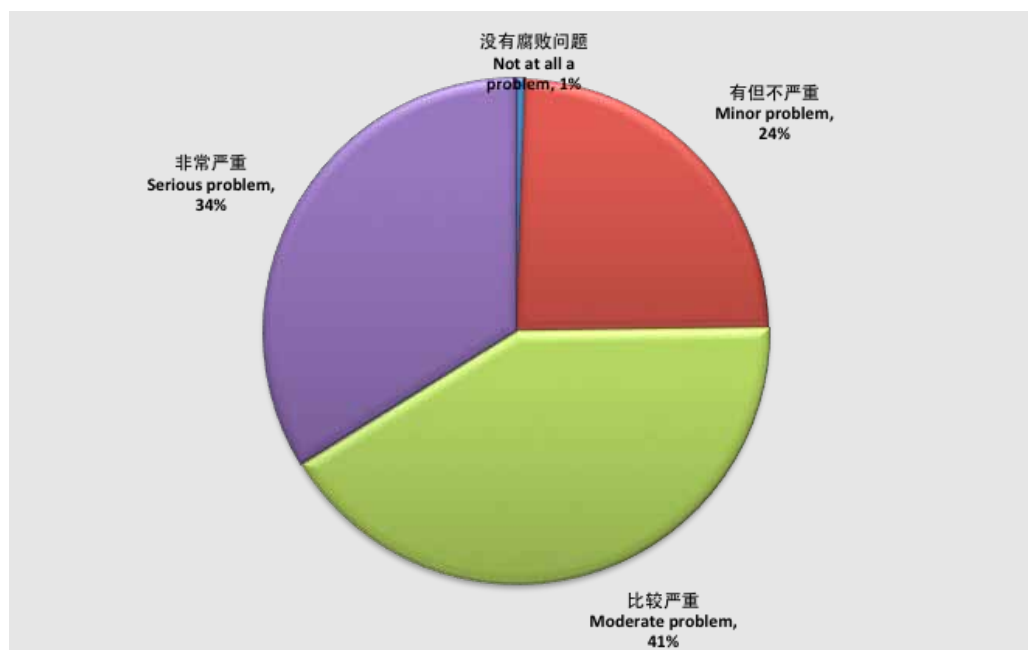


34% 的受访公司认为腐败问题非常严重，41% 认为比较严重。（表 III.2.3）

About 34% of the respondents say that corruption is a serious problem whilst 41% of them see it as moderate issue (Chart III.2.3).

**Chart III.2.3 您认为，总体而言，腐败在中国严重吗？ (N=343)**

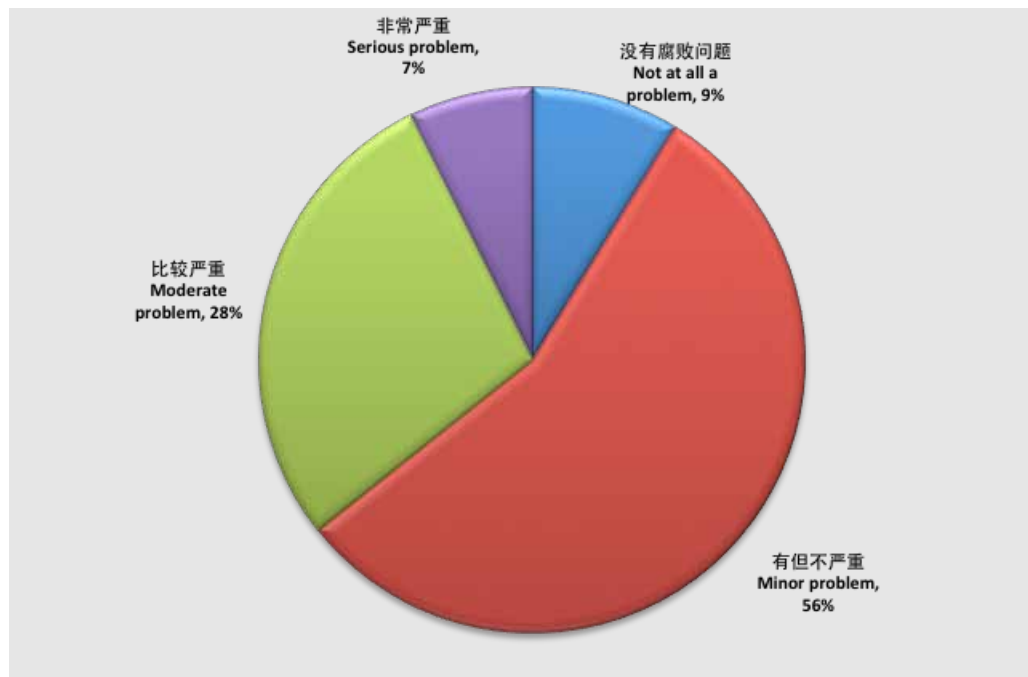
**In your view, how serious is corruption in China, in general?**



然而，有趣的是，当我们请受访公司对自己所在行业的腐败问题作出评价时，只有 7% 的认为行业内腐败问题非常严重，28% 的认为比较严重，而有 56% 的公司认为自己所在行业行业内有腐败问题但不严重。（表 III.2.4）

However, when we asked interviewees how important corruption was in their industries, only 7% of them thought that it was a serious problem, and 28% believed that it is of moderate concern while 56% thought it's only a minor problem. (Chart III. 2.4).

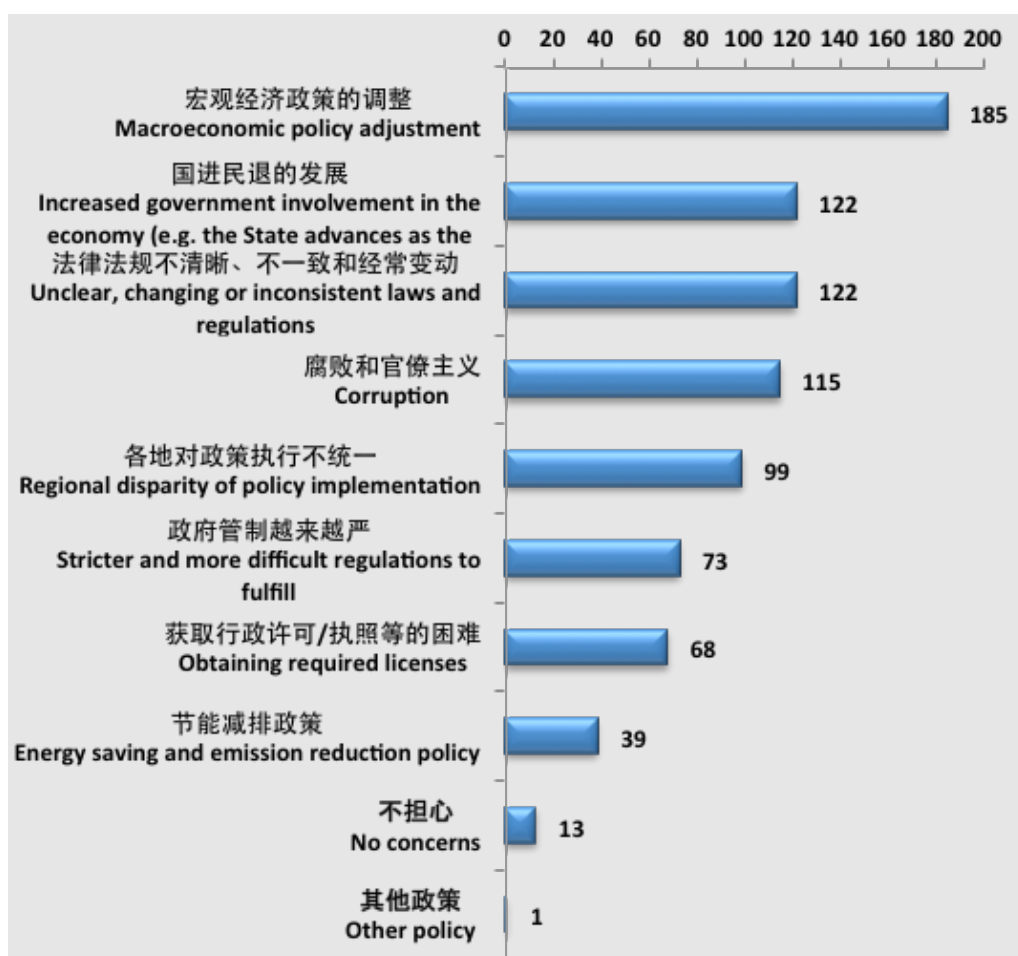
**Chart III.2.4 贵公司所在行业存在腐败问题吗？ (N=342)**  
**In your view, how serious is corruption on your industry?**



当被问及对中国政府政策和法律环境方面的担忧时,受访公司并没有把腐败列在首位。他们最担心的是宏观经济政策的调整。政府如何管理好经济发展,是否能 在全球危机的背景下保持经济高速增长,这些问题毫无疑问将影响受访公司未来的业绩。(表 III.2.5)

When we asked our executives about their main concerns regarding the Chinese legal environment they did not isolate corruption as the number one problem. They perceived macroeconomic policy adjustment as their key concern. How well the government will manage the economy, and whether they are able to maintain high economic growth despite the global crisis, will undoubtedly affect these companies' performance in the future (Chart III.2.5).

**Chart III.2.5 在中国政府政策和法律环境方面, 贵公司存在哪些担心?**  
**What are your main concerns regarding the Chinese government and legal environment?**



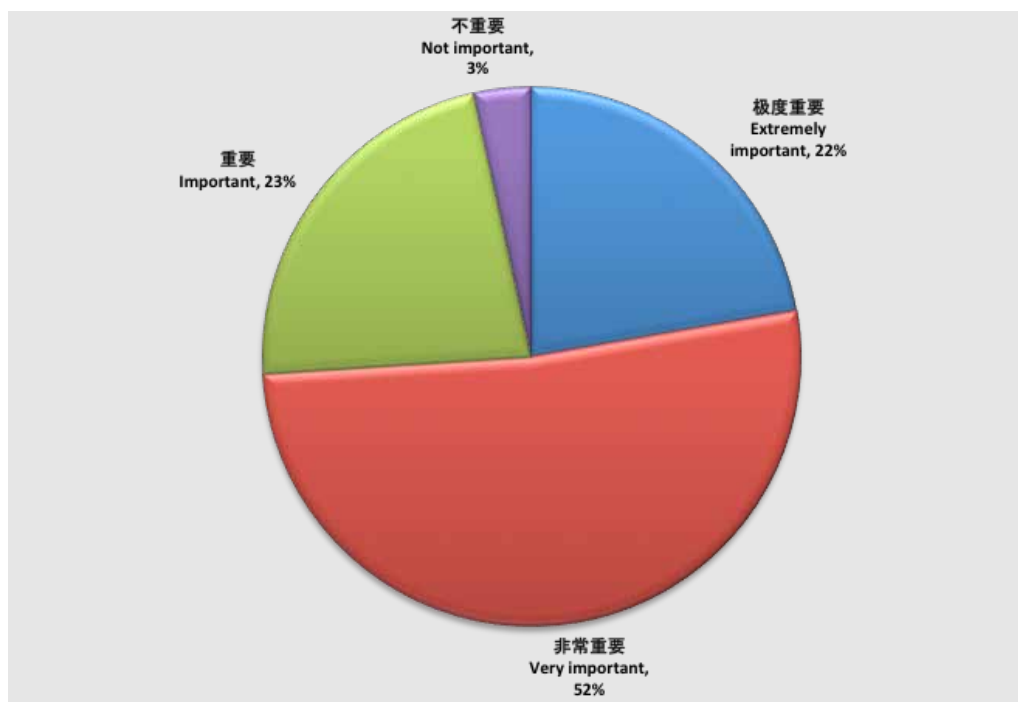
“其他”包括: 竞争体系的构建. The "other" category includes: the setup of competition system.

几乎所有的受访公司（97%）都认为与政府机构保持良好关系是在中国市场取得成功的重要因素。（表 III.2.6）

Almost all respondents (97%) agreed that building good relationships with Chinese authorities is a critical factor to succeed in China. (Charts III.2.6)

**Chart III.2.6 与政府机构保持良好关系有多重要？ (N=346)**

**How important for your business is to build/keep good relationship with government authorities?**



# 第四部分

## Section IV

### 经营活动

### FUNCTIONAL PERSPECTIVES

这部分内容旨在加强读者对受访公司内部经营活动的了解，并理解公司在各种活动中取得成功所需要的关键因素及面临的挑战。所涉及的经营活功有：

- 生产与供应：工厂数量与位置，工厂选址的决策过程，主要供应商，选择供应商重要考虑因素以及在与供应商合作过程中的主要问题。
- 营销与销售：市场定位，营销费用在销售收入中所占比例，营销活动的有效性以及分销
- 人力资源：主要问题，解决方案，工资变化，人员流动率以及留住人才。

**This section gives perspectives of three different functional areas:**

- **Production and Supply:** number and location of plants, decision processes to choose locations of facilities in China, main suppliers, key decision factors in choosing a supplier and major challenges dealing with them.
- **Marketing and Sales:** positioning in the market, percentage of sales spent on marketing, effectiveness of marketing efforts and distribution.
- **Human Resources:** major issues, solutions, salary evolution, turnover rate and talent retention.

**The purpose of this section is to bolster understanding of the internal operations of the respondents, and the challenges and success factors they face in these functional areas.**

## IV.1 生产与供应

### Production and Supply

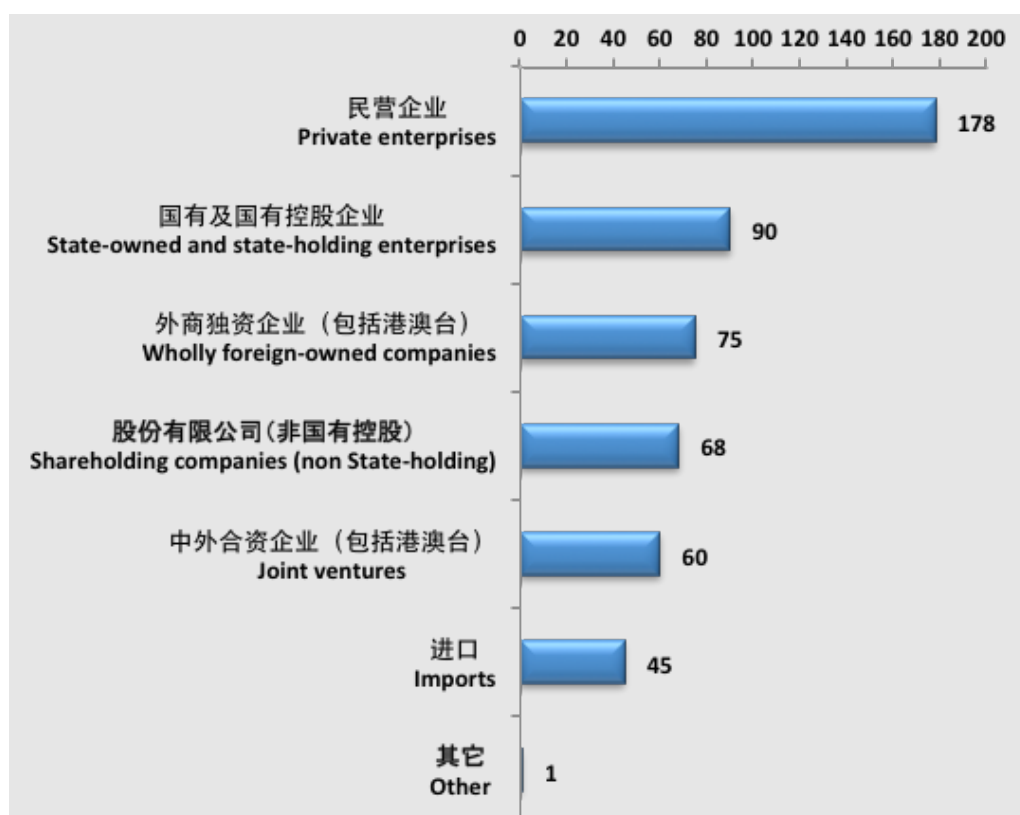
大多数受访企业在国内至少有一家工厂，通常位于沿海省市以及上海和北京，有海外工厂的不多。在选址时，他们将当地政府提供的优惠政策，靠近客户，合格人才供应列为重要考虑因素。在选择供应商时，他们将质量排在第一，价格第二，这对习惯打价格战的国内供应商应该是个挑战。

The majority of the companies interviewed had at least one plant located in the coastal provinces, Shanghai and Beijing. When selecting where to place their manufacturing plant, our respondents listed favorable policies provided by local government, prime proximity to their customers and the supply of qualified talent as important. On the other hand, when selecting suppliers, they valued quality over price, which poses a challenge as Chinese suppliers commonly compete by price.

多数受访公司的主要供应商为民营企业，国有及国有控股企业排在第二位。（表 IV.1.1）

Most of the companies interviewed perceived private enterprises as the main suppliers, followed by state-owned and state-holding enterprises. (Chart IV.1.1).

**Chart IV.1.1 贵公司的主要供应商有哪些？**  
**Who are the main suppliers to your company?**

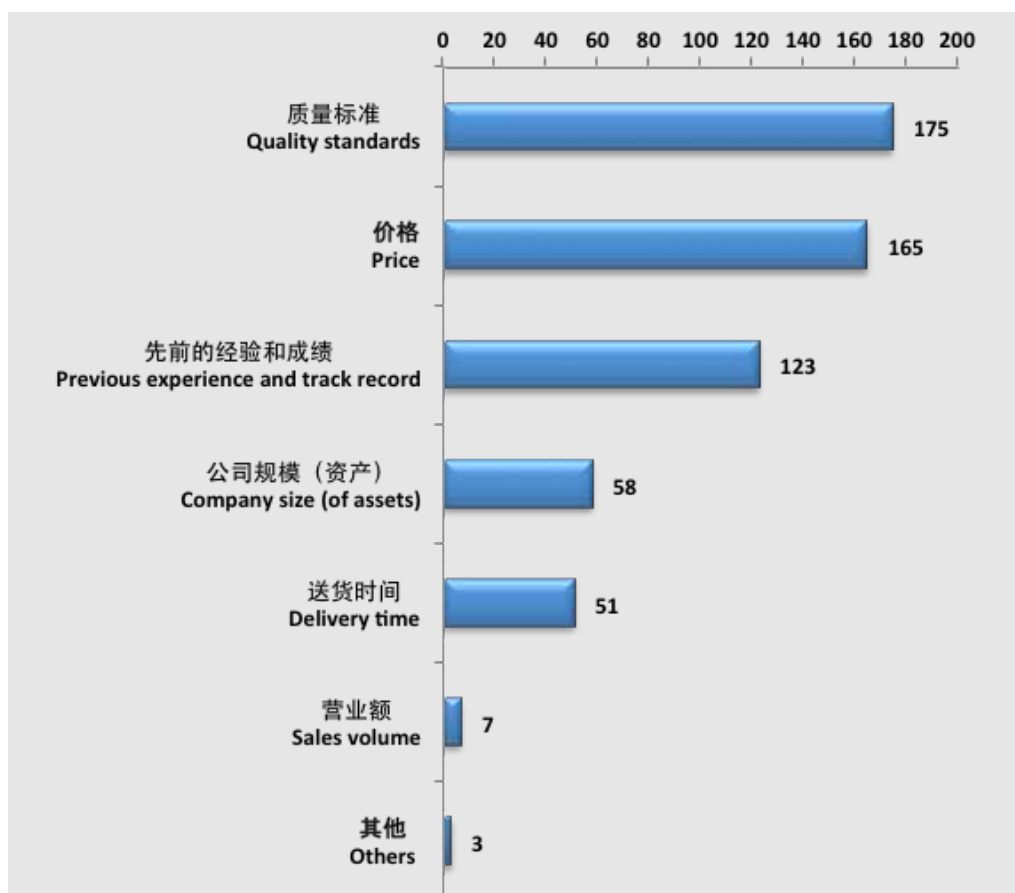


“其他”包括：个人。The "other" category includes: individual

受访公司在选择供应商时，将质量排在第一位，价格第二位。虽然二者之间差别不大，但这一结果说明供应商应该在保持价格优势的同时，尽力改进产品和服务质量。(表 IV.1.5)

When selecting a supplier, our respondents seek quality first and price second. Although the difference is not big, this indicates suppliers shall try to improve the quality of their products and services whilst maintaining competitive prices (Chart IV.1.5).

**Chart IV.1.2 在选择供货商时，最关键的因素是什么？**  
**What are the key decision factors to select a supplier?**



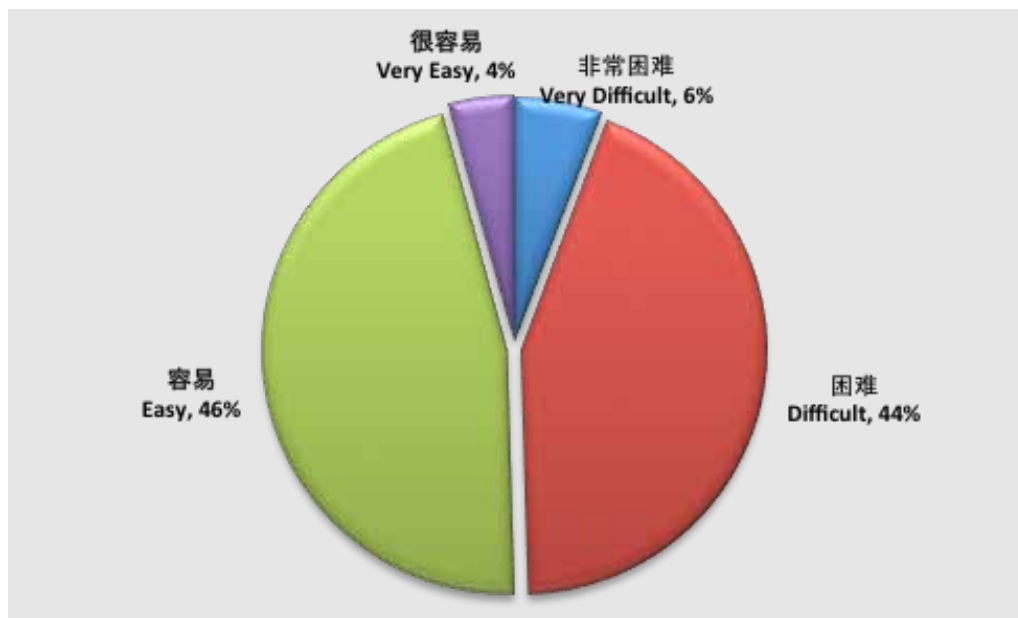
“其他”包括：开发，信用，服务等。The "other" category includes: development, credit, service etc.



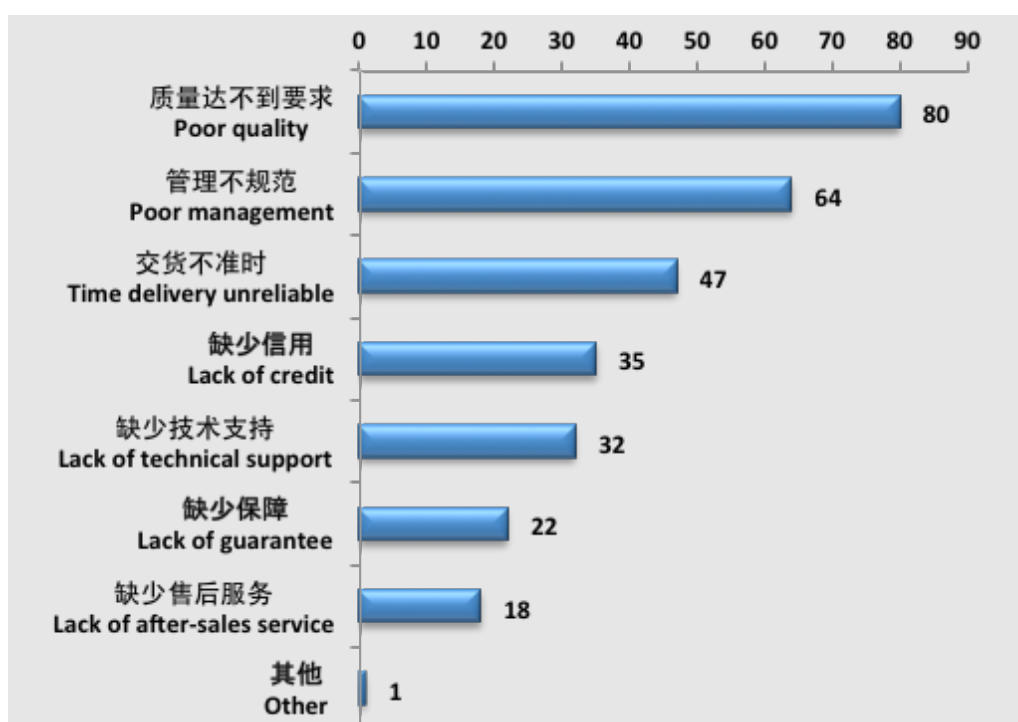
接近一半（44%）的受访者认为在国内找到合适的供应商很难，而另一半（46%）则认为很容易。（表 IV.1.3）找不到合适供应商的理由主要是质量以及管理问题。（表 IV.1.4）

Almost half of the respondents (44%) thought it was difficult to find a qualified suppliers in China while the other half (46%) thought it was easy. (Chart IV.1.3) The reasons that they cannot find the qualified suppliers are related to the quality and corporate governance. (Chart IV.1.4)

**Chart IV.1.3 对贵公司来说，在国内寻找合格的供应商困难吗？ (N=212)**  
**How difficult it is to find a qualified supplier in China?**



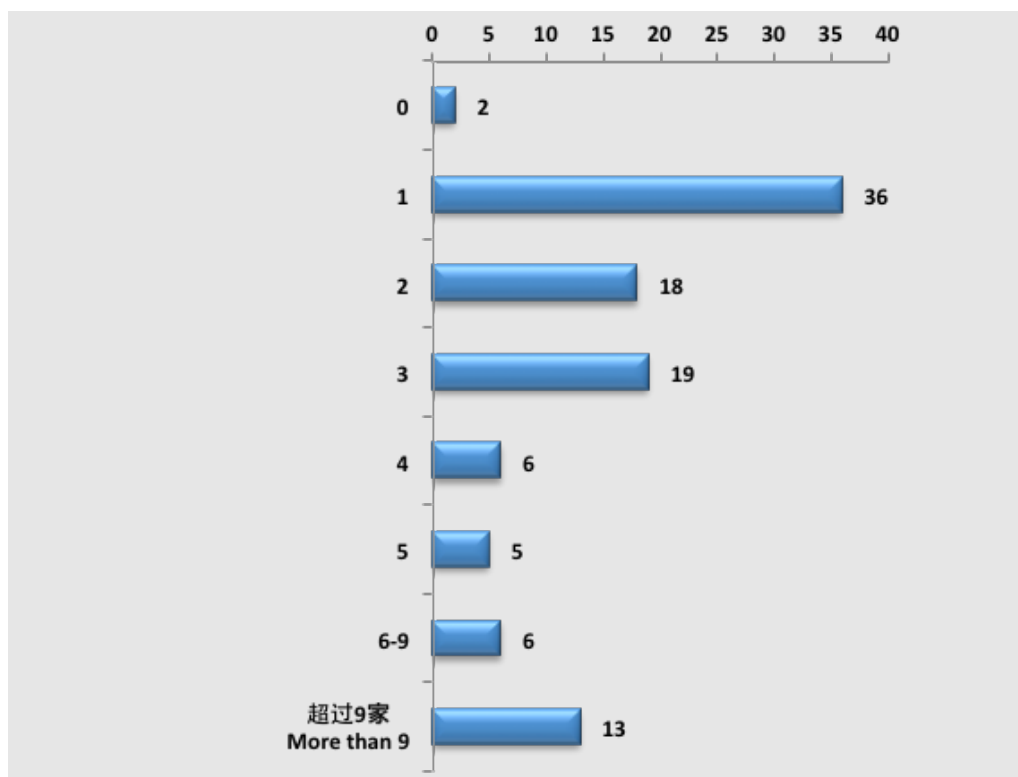
**Chart IV.1.4 寻找合格的供应商困难主要是因为国内供应商**  
**Why is it difficult to find a qualified supplier?**



几乎所有的受访公司（98%）在中国有工厂，12% 有超过 9 家工厂。（表 IV.1.6）他们大多数位于沿海省市以及上海和北京。（表 IV.1.7）

Almost all companies (98%) interviewed have plants in China and 12% have more than 9 plants.(Chart IV.1.6) and they are mostly located in coastal provinces, Shanghai and Beijing. (Chart IV.1.7)

**Chart IV.1.6 贵公司在国内有几家工厂？ How many plants do you have in China?**



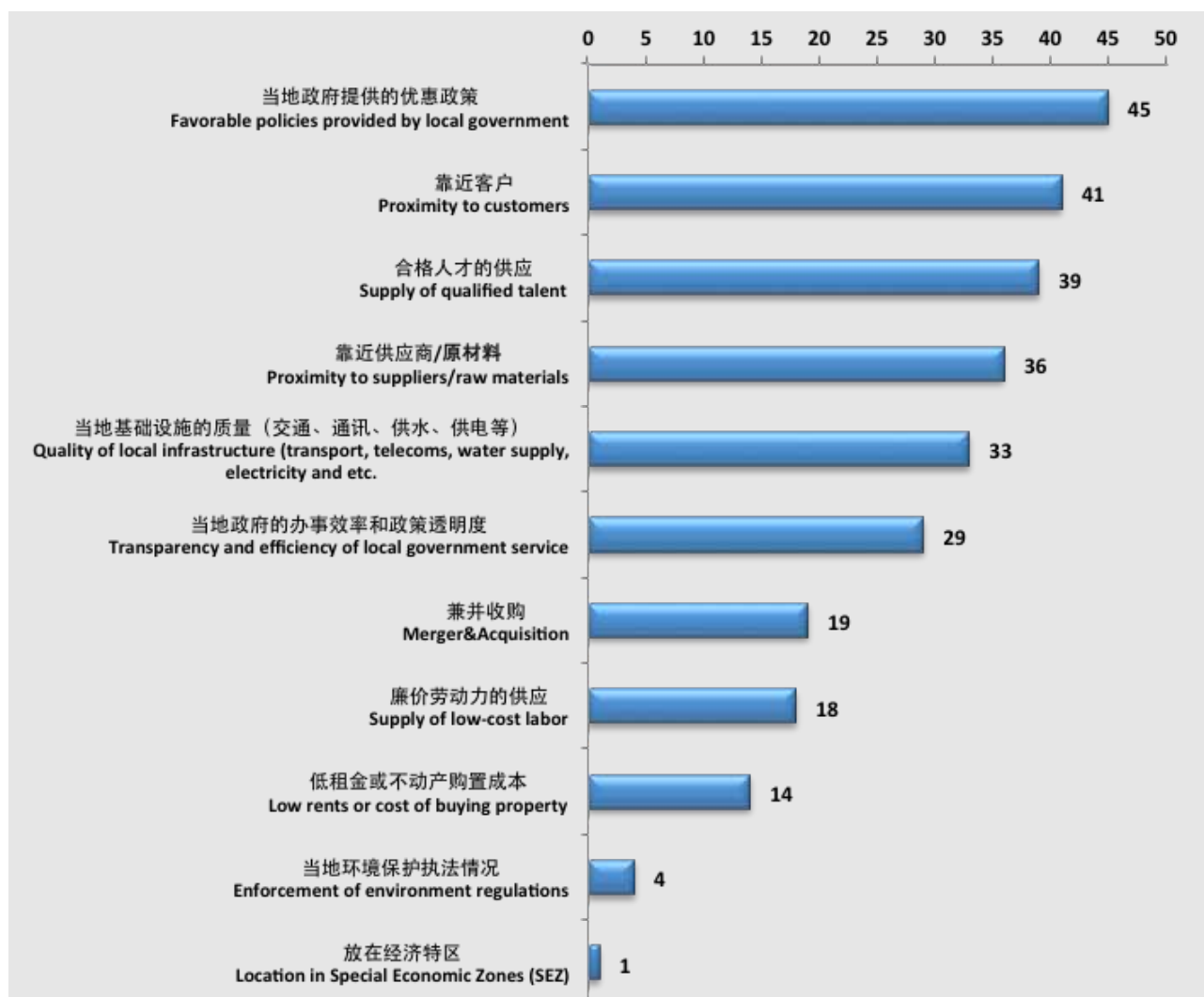
**Chart IV.1.7 这些工厂位于？ These plants are located in?**

答案 /Answer	人数 /Response
江苏、浙江、安徽、福建、江西、山东 Jiangsu, Zhejiang, Anhui, Fujian, Jiangxi, Shandong	41
上海 Shanghai	30
河南、湖北、湖南 Henan, Hubei, Hunan	14
北京 Beijing	13
广东、广西、海南 Guangdong, Guangxi, Hainan	13
深圳 Shenzhen	9
陕西、甘肃、青海、宁夏、新疆 Shaanxi, Gansu, Qinghai, Ningxia, Xinjiang	9
河北、山西、内蒙 Hebei, Shanxi, Inner Mongolia	8
四川、贵州、云南、西藏 Sichuan, Guizhou, Yunnan, Tibet	8
重庆 Chongqing	7
辽宁、吉林、黑龙江 Liaoning, Jiling, Heilongjiang	7
天津 Tianjin	4

受访公司在工厂选择时考虑的首要因素是当地政府提供的优惠政策和是否靠近客户。这些因素不仅能帮助公司顺利运营，而且能降低物流成本，更好进行供应链管理。另外，合格人才的供应，是否靠近供应商、原料以及当地基础设施的质量也是工厂选址的重要考量因素。让人惊讶的是，放在经济特区是最不重要的因素。(表 IV.1.8)。

The most important consideration cited in deciding where to locate a factory is favorable policies provided by local governments and proximity to customers. They not only help with the smooth operation but also decrease distribution costs and allow a better coordination of the supply chain. Additionally, the quality of local infrastructure, the availability of qualified talent and the proximity to suppliers are also key considerations noted when selecting locations for their plants. Surprisingly, being a Special Economic Zone seems to be one of the least important factors (Chart IV.1.8).

**Chart IV.1.8 就贵公司而言，工厂选址时的主要考虑因素有哪些？**  
**Which of the following factors is important deciding the location of your plant?**



只有 8% 受访者有海外工厂。(N=103), 且主要位于东亚和东南亚国家。(表 IV.1.9)

Only 8% of the respondents have production facilities outside of China and most of them locate in other East and Southeast Asian countries. (Chart IV.1.9)

### Chart IV.1.9 海外工厂位于？

#### Where are your overseas plants located?

答案 /Answer	人数 /Response
其他东亚和东南亚国家 Other East and Southeast Asian Countries	2
日本 Japan	1
美国 US	1
德国 Germany	1
其他西欧国家 Other Western Europe	1
台湾 (中国) Taiwan (China)	1
香港特别行政区 H.K.(S.A.R)	1
中东 (包括土耳其) Middle East (incl. Turkey)	1
澳大利亚和新西兰 Australia and New Zealand	

## IV.2 营销与销售

### Marketing and Sales

有相当一部分受访公司每年的营销费用占销售收入比例在 5% 以上。最有效的营销手段是直接促销。

A large proportion of the companies interviewed spend more than 5% of their sales revenues on marketing. The most effective marketing activity is direct promotion.

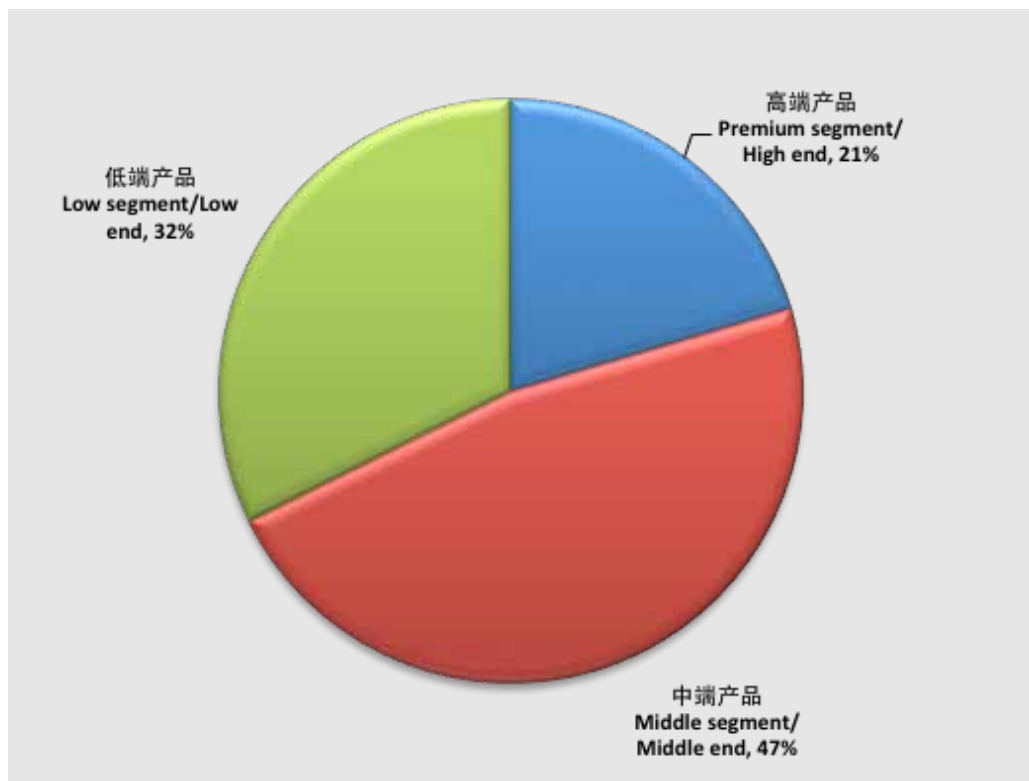
在渠道方面，多数受访公司有自建渠道或者直接销售。第二种比较普遍的做法是通过当地代理或者分销商销售，有助于开拓新疆土，比自建渠道节省成本。

In terms of distribution, most companies interviewed either own the channels or do direct sales. A second common way to distribute products is through local agents or distributors that allow our respondents to reach out to new geographies, which would otherwise be very costly to attain.

受访公司的产品覆盖三个细分市场（低端，中端，高端），而中端最多（47%）。他们出售的低端产品比高端产品多。出现这种情况，可能是因为中国公司习惯打价格战，价格战带来的竞争优势在低端市场更明显。（表 IV.2.1）

The companies we interviewed sell their products in all three market segments (low, medium and premium) with a preference for the middle segment (47%). They also sell more in the low segment than in the premium segment. This situation may occur because Chinese companies were used to compete on price and this competitive advantage is more obvious in low segment. (Chart V.2.1).

**Chart IV.2.1 在中国，贵公司低端、中端和高端产品占总收入的百分比大概分布情况是？**

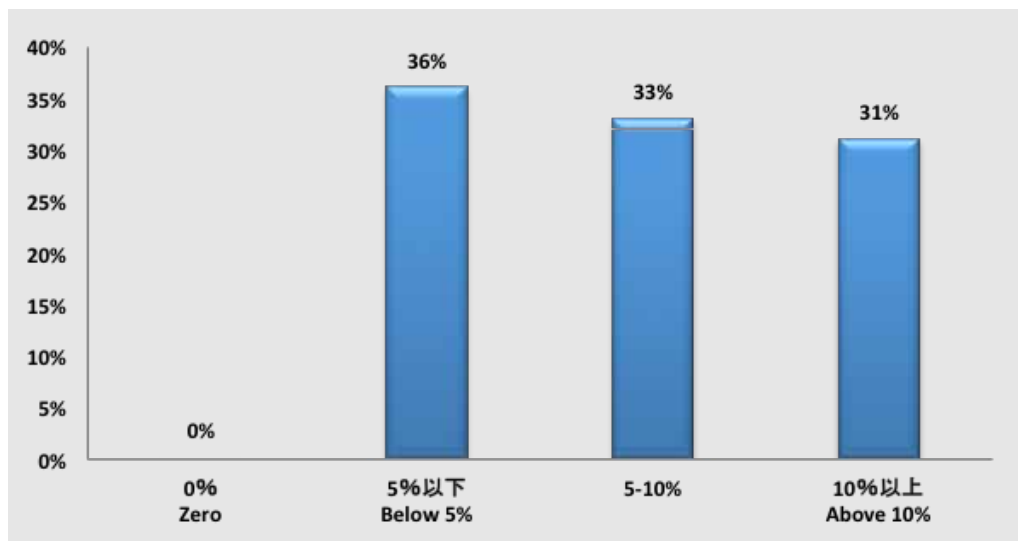


64% 的受访公司每年的营销费用占销售收入比例超过 5%。(表 IV.2.2) 随着品牌影响力上升以及中国市场的成熟, 营销费用占销售收入比例有望逐渐上升。

64% of companies interviewed spent more than 5% of their yearly revenues on marketing and sales (Chart IV.2.2). As branding acquires increasing relevance and the Chinese market matures, the percentage of yearly revenues spent on marketing and sales is expected to grow.

**Chart IV.2.2 贵公司每年的营销费用约占销售收入的百分之几? (N=261)**

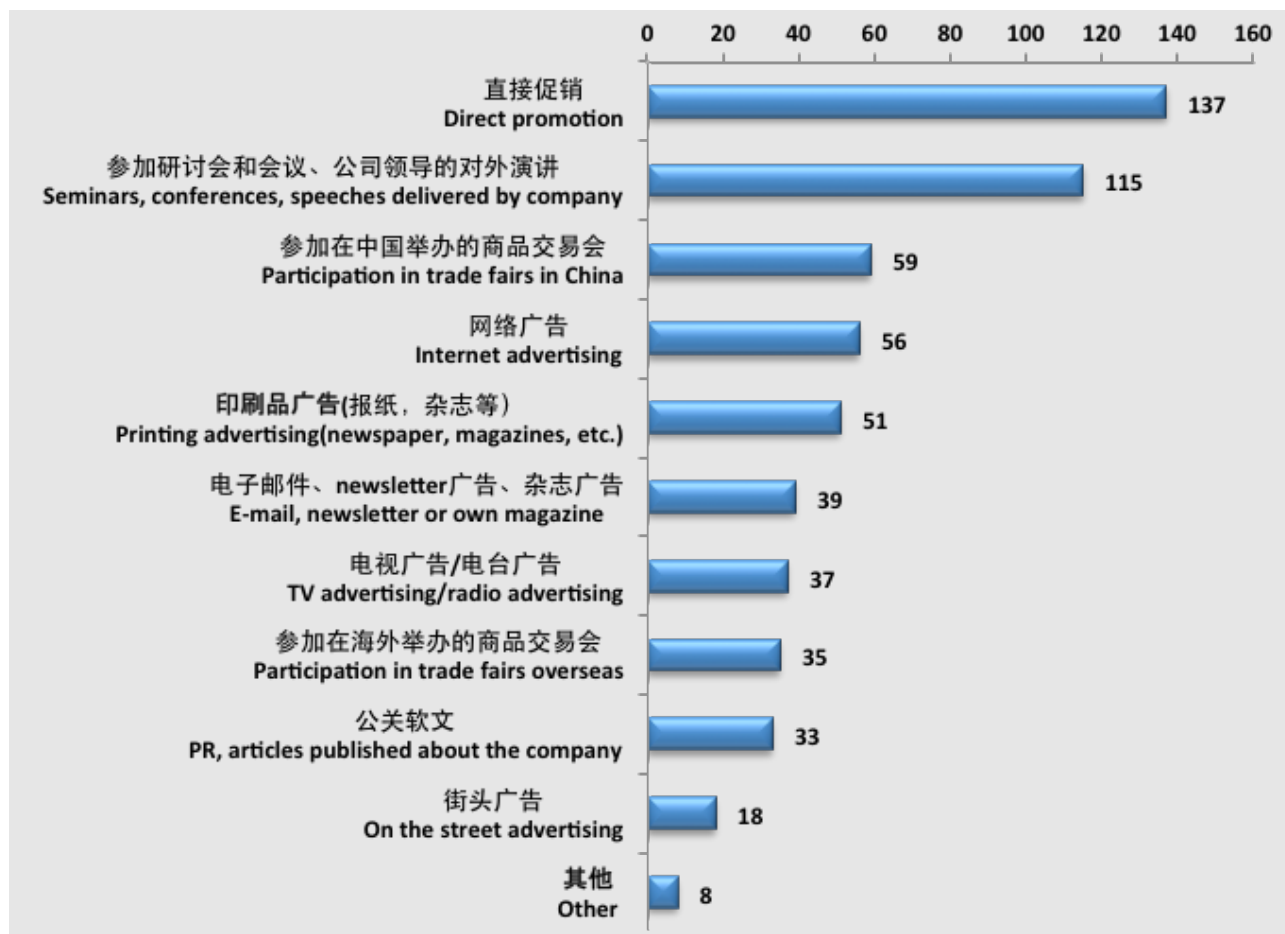
**What percentage of yearly revenues do you spend on marketing and sales?**



效果最好的前三大营销活动为:直接促销,研讨会和会议,商品交易会。由此可见,能直接和消费者互动的营销活动效果最好。(表 IV.2.3)

The top three most effective marketing activities are direct promotion, seminars/conferences/speeches and participation in trade fairs. It seems that activities that involve direct interactions with customers work the best. (Chart IV.2.3)

**Chart IV.2.3 就贵公司而言,下列哪些营销手段效果最好?最多选择3项**  
**Which marketing activities are most effective for your main business? Maximum 3**



“其他”包括:搜索,口碑,赛事赞助等。The "other" category includes: searching engine, word of mouth, contest sponsorship.

多数受访公司拥有自建渠道或者直接销售。第二种比较普遍的方式是通过当地代理或者分销商销售。在中国这样一个幅员辽阔，多样化的国家里，基础设施还不完备，还是需要与当地分销商合作，以进入二级及以下的城市。

Most of the companies in our survey own their distribution channels or sell directly. The second most common way to distribute their products is through Chinese agents or distributors. In a vast and heterogeneous country such as China, where infrastructure is still developing it is essential, if not indispensable, to team up with Chinese distributors to reach second or lower tier cities (Chart IV.2.4).

**Chart IV.2.4 贵公司的主要销售渠道是？**  
**How do you distribute your products?**



“其他”包括：通过熟人介绍，结合海外代理，政府定制采购等。

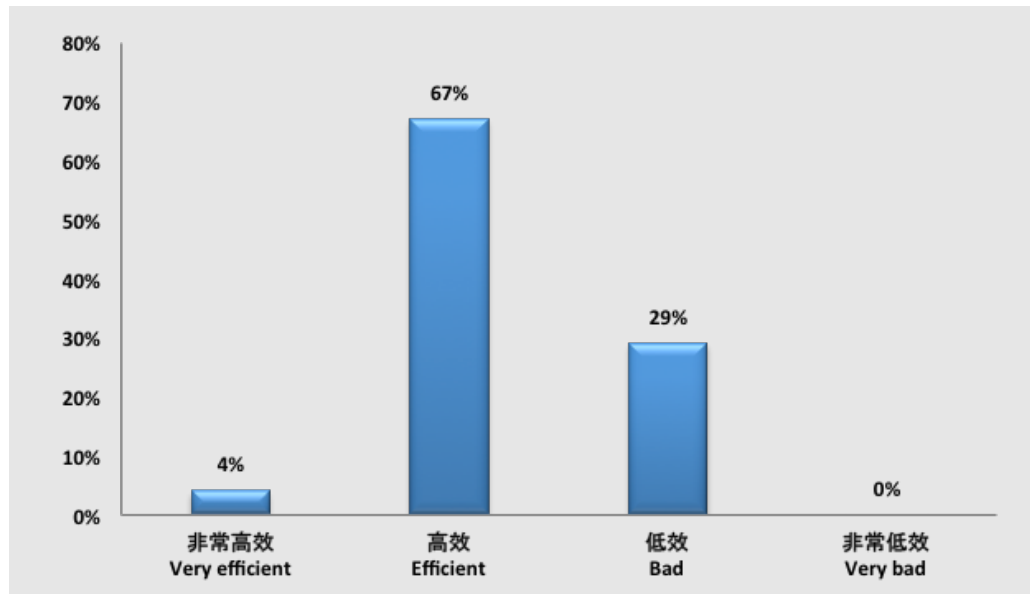
The "other" category includes: acquaintance, overseas distributor, government purchase etc.



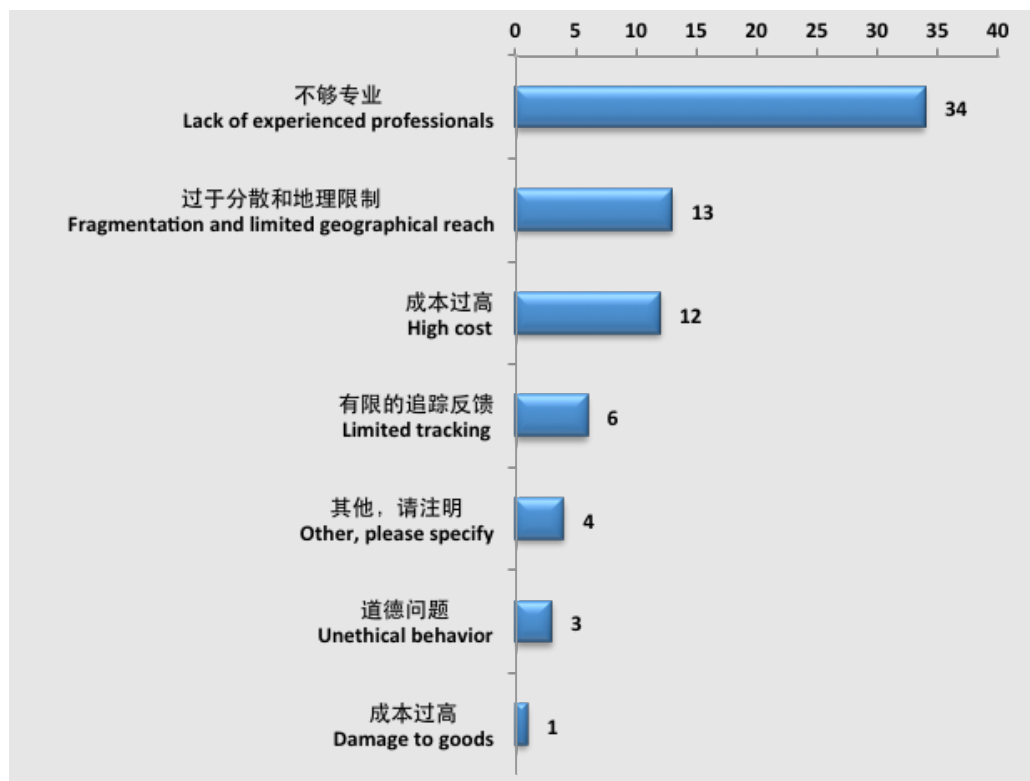
超过 60% 的受访公司认为他们的国内销售网络很高效，而销售网络低效的原因主要是不够专业。（表 IV.2.5/IV.2.6）

More than 60% of the respondents think their national distribution network efficient. And those who think their distribution network bad attribute the reason to lack of experience professionals. (Chart IV.2.5/IV.2.6)

**Chart IV.2.5 您如何评价您的国内销售网络？（N=245）**  
**How do you evaluate your national distribution network?**



**Chart IV.2.6 为什么贵公司的营销渠道不好？**  
**Why is your distribution network bad or very bad?**



## IV.3 人才与工资

### Human Resources

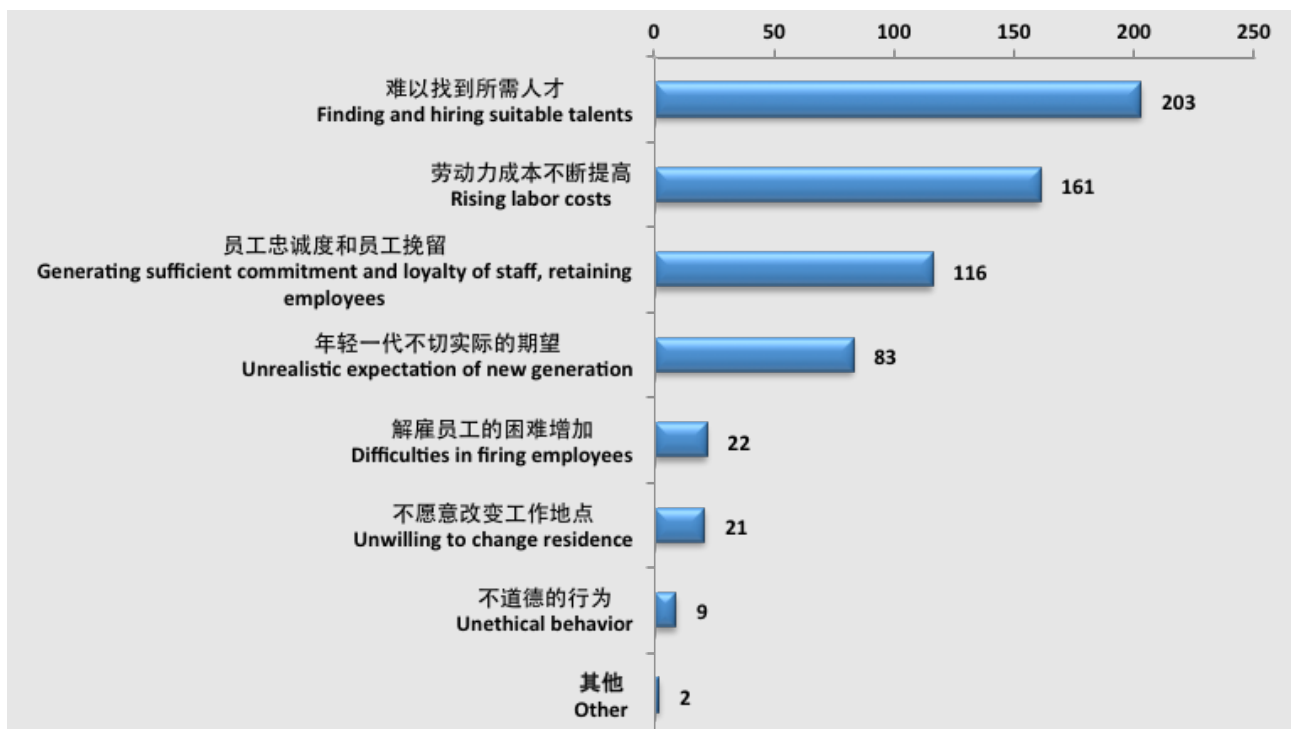
受访公司在中国的业务在增长,人才问题成为它们的重要挑战。受访公司称很难找到称职的中层管理人员以及工程技术人员,他们不是缺少必要的技能就是工资期望太高。

The sales of companies interviewed are increasing. Companies found it especially difficult to hire middle managers/engineers because they either lacked experience and skills or their monetary expectations were too high.

多数公司表示人力资源问题是公司顺利运营的头等大事。录用和留住核心员工以及上涨的劳动力成本是他们面对的主要问题。(表 IV.3.1)

The majority of the companies agree that human resources is their top concern in successfully running their businesses in China. Hiring and retaining key employees and rising labor costs are the top challenges (Chart IV.3.1).

**Chart IV.3.1 在人力资源方面,贵公司面临的主要问题是什么?**  
**Which is the major human resource issues facing your company in 2011?**



“其他”包括：人才经常被猎头公司猎取，员工素质提升等。

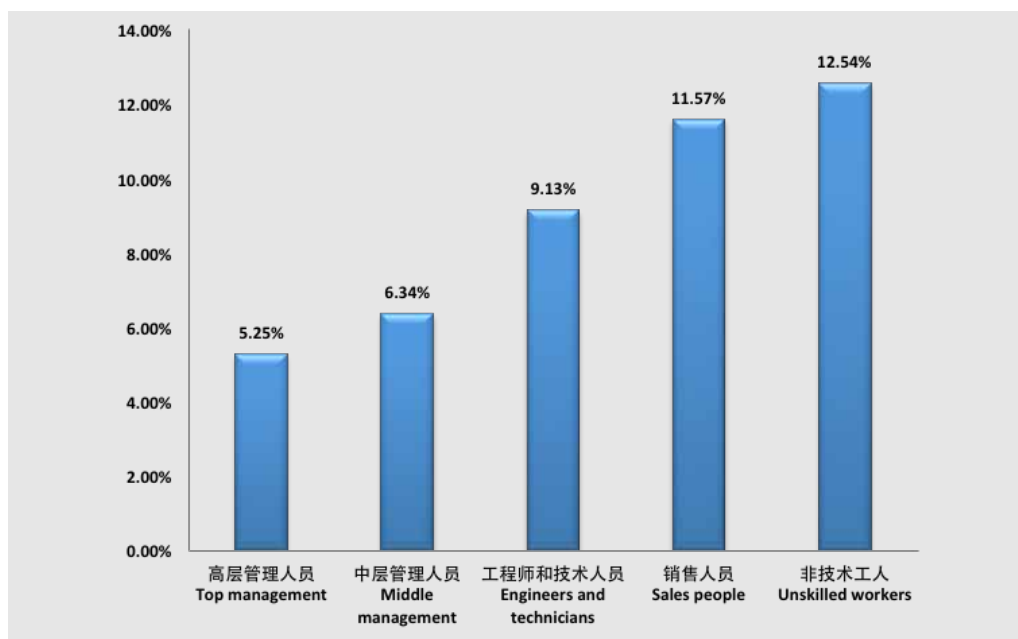
The "other" category includes: head hunter often hunt talents, enhancement of employee's competency.

2011 年的员工流动率显示, 在所有级别中, 非技术工人的流动率最高。(表 IV.3.2)

Speaking of the turnover rate of 2011, unskilled workers are the most difficult to retain. (Chart IV.3.2)

**Chart IV.3.2 贵公司 2011 年不同级别的平均员工流失率大约是 (%) ?**

**What is your company's average employee turnover in 2011 by category?**

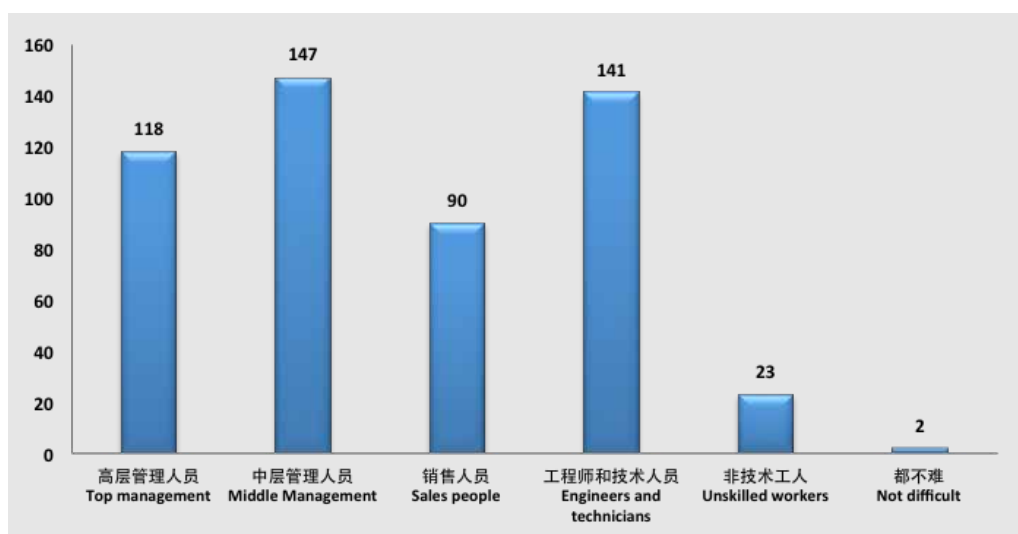


对多数受访公司来说, 最难找的人才中层管理人员以及工程师和技术人员。主要原因是他们的技能水平和经验达不到要求, 而那些达到要求的, 薪酬水平又高于公司支付能力。(表 IV.3.3/IV.3.4)

For most of the companies interviewed, suitable middle management and engineers are the most difficult to find because their skills and experience are not up to desired level and even if they are, they will be too expensive. (Chart IV.3.3/IV.3.4)

**Chart IV.3.3 贵公司在哪个层次上最难找到所需的合适人才?**

**At which level is it difficult to find suitable human resources for your company?**



**Chart IV.3.4 难以找到合适人才的主要原因是什么？**

**For the personnel you have difficulty acquiring, what are the key reasons?**



“其他”包括：企业文化，区域位置，公司性质等。

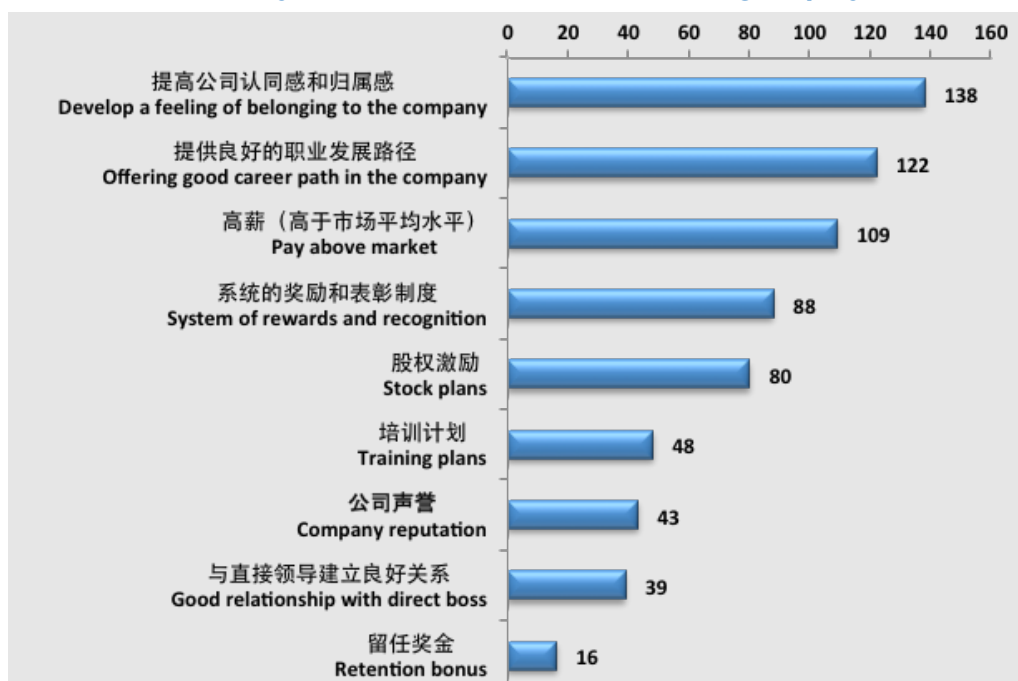
The "other" category includes: corporate culture, location and company type, etc.

受访公司采用多种不同方式挽留人才，其中最有效的三种是提高公司认同感和归属感，提供良好的职业发展路径，高于平均水平的薪酬。不管公司采取哪种方式，都需要对所有人力资源活动给予关注，以挽留人才，降低各层次的人员流动率。（表 IV.3.5）

Our respondents use different ways to retain key employees and the top three effective ones are creating a feeling of belonging to the company, offering good career prospects and above market average pay. No matter what measures they take, what is clear is that companies need to pay special attention to all HR practices in order to retain talent and reduce turnover at all levels (chart IV.3.5).

**Chart IV.3.5 就贵公司而言，最有效的人才挽留手段包括？**

**What measures do you find most efficient in retaining employees?**



# 第五部分

## Section V

### 合资企业

### JOINT VENTURES

在这部分，读者可以了解到与国外合作伙伴组建的合资公司的信息以及他们面临的主要问题：

- 股权结构
- 与国外合作伙伴合作中出现的主要问题

This section covers information about joint ventures with foreign partners, specifically:

- Ownership positions
- Main difficulties in working with foreign partners

The purpose of this section is to give a sense of the main challenges faced when partnering with a foreign entity.

36% 的受访者所在企业是合资企业 (N=283)，他们代表中方，外资合作伙伴主要来自美国，香港，德国等。(表 V.1)  
 36% of the respondents have foreign JV partner. They represent the Chinese side of the JV and their partner mostly come from U.S.,HK and Germany etc. (Chart V.1)

**Chart V.1. 贵公司（主要）外资合作伙伴来自哪个国家或地区？**

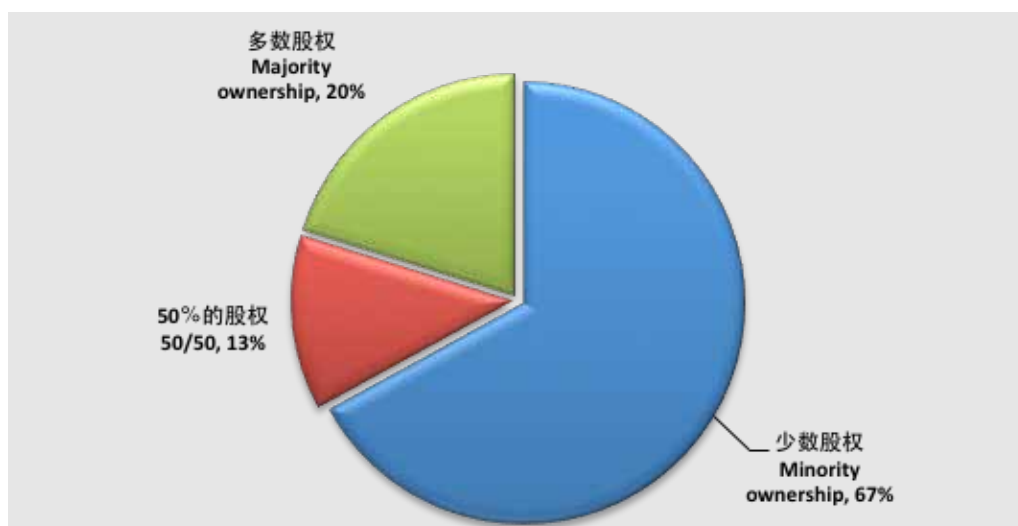
**Which is the nationality of your principle foreign or non-mainland Chinese partner?**

答案 /Answer	人数 /Response
美国 US	24
香港特别行政区 H.K.(S.A.R)	17
德国 Germany	13
其他西欧国家 Other Western Europe	10
英国 UK	10
其他东亚和东南亚国家 Other East and Southeast Asian Countries	5
日本 Japan	5
台湾（中国）Taiwan (China)	4
法国 France	3
澳大利亚和新西兰 Australia and New Zealand	2
韩国 South Korea	2
印度 India	1
巴西 Brazil	1
加拿大 Canada	1
其他 Other,	4

在多数情况下（67%），中方拥有多数股权。(表 V.2) In most cases (67%), the Chinese side controls the JV. (Chart V.2)

**Chart V.2 在股权结构中，外方拥有百分之几？(N=94)**

**What is the ownership position of your foreign partner?**

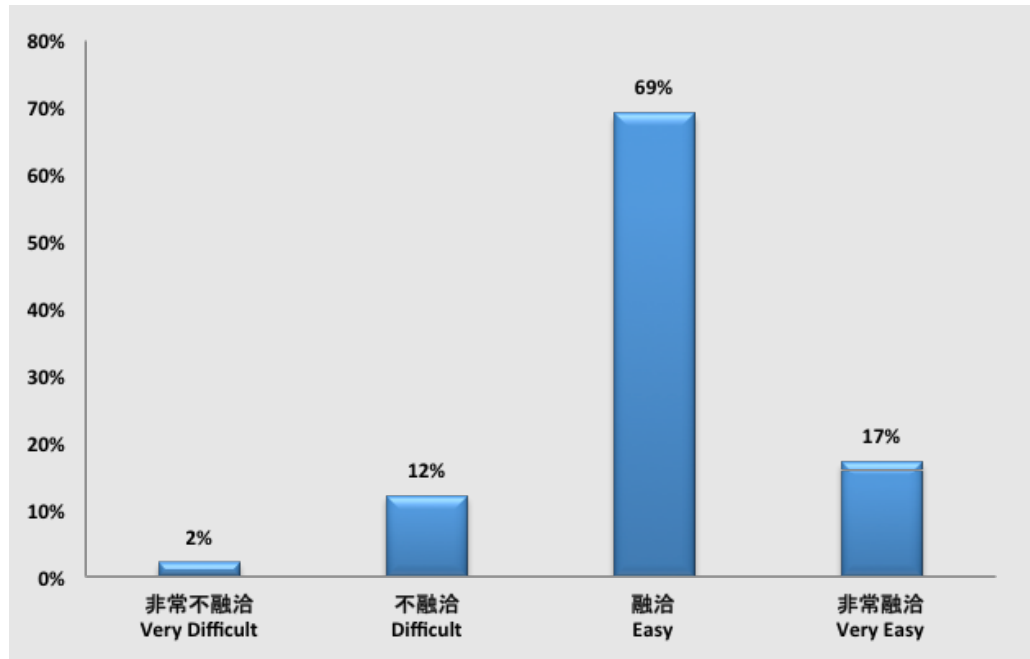


多数受访公司与外方合作融洽。(表 V.3) 而不融洽的主要原因有关注点不同, 文化差异和经验理念的差异等。(表 V.4)

Most of the companies interviewed found it easy (69%) or very easy (17%) to work with the foreign partners. (Chart V.3) And the main reasons that they cannot work well together are due to conflict of interests, cultural differences and business concept differences. (Chart V.4)

**Chart V.3 双方合作融洽吗? (N=94)**

**How difficult/easy is working with your foreign partner or non-mainland partner?**



**Chart V.4 与外方或是非大陆中国方合作不融洽的主要原因是什么?**

**In your view, what are the main difficulties with your foreign or non-mainland Chinese partner?**



# 第六部分

## Section VI

### 创新

### INNOVATION

这部分内容涵盖了受访者公司在中国进行的创新举措的详细信息，旨在使读者了解中国公司在创新和知识产权保护方面的发展趋势。我们从以下三大类进行阐述：

- **创新**：创新类型，去年上市的新产品数量以及这些新产品的销量占去年销售额的比例
- **研发**：研究活动类型，研发中心规模，选址，员工人数，研发经费以及在中国开始建立研发中心的理由
- **知识产权**：知识产权的重要性，知识产权的类型，知识产权侵权案例以及对公司业务造成的损害，保护知识产权的手段以及政府知识产权保护力度。

This section details information about the kind of innovations the respondents' companies developed in China. We have classified the answers into three groups:

- **Innovation**: types of innovations, number of new products/services launched in 2011 and contributions of these new products to the last year's sales.
- **R&D**: type of research activities, size of R&D centers, locations, numbers of employees, research budget and reasons for opening an R&D center in China.
- **Intellectual Property Rights**: importance of IP, type of IP owned, IP infringements experienced, resultant damage to their businesses, ways to protect against infringements and government IPR protection.

The purpose of this section is to give a summary of the innovation tendencies of Chinese companies and trends regarding intellectual property rights protection.



## VI.1 创新与研发

### Innovation and R&D

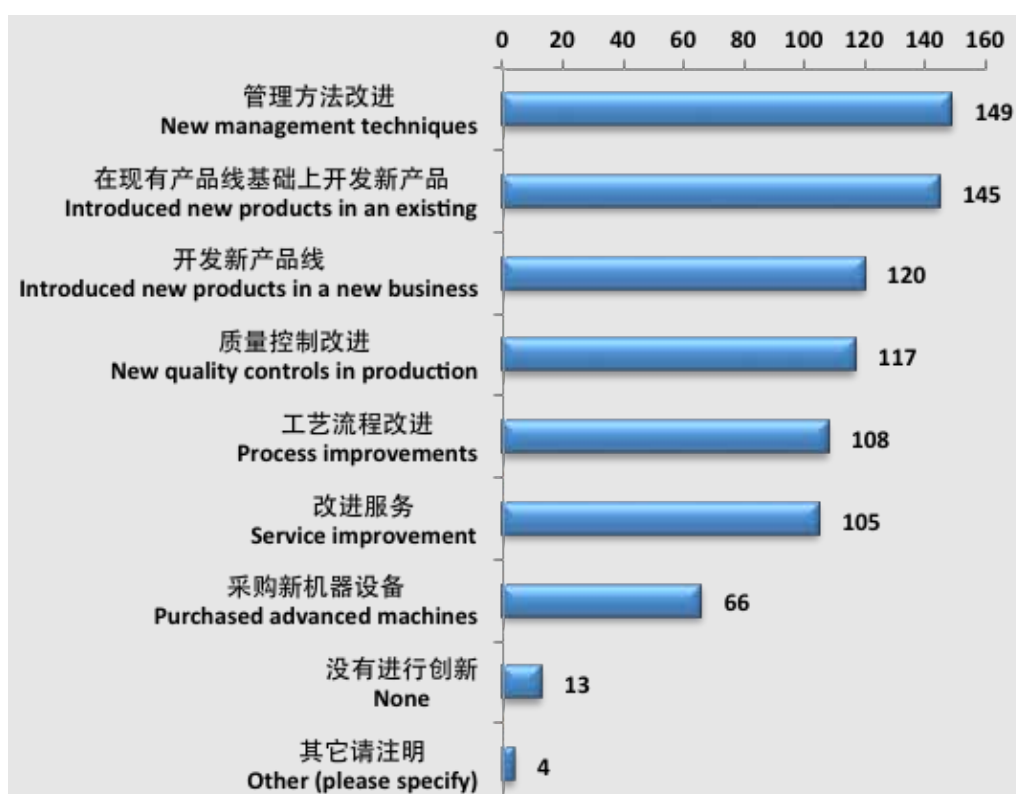
77% 的受访者表示他们有研发活动，且大多数企业拥有专利。多数研发中心位于沿海省市和上海北京，未来新建研发中心的选址也不出其右。研发中心的资金和员工人数各有不同，不过大多数公司（54%）的研发经费占销售收入的比例低于 5%。

77% of the respondents inform they have R&D activities and many of them own patents. Most of the R&D centers are located in the coastal provinces, Shanghai and Beijing and they plan to place the future centers in the similar places. The funding and the number of employees of these centers vary widely across the sample, although most companies (54%) spend less than 5% of their revenues in R&D activity.

受访公司最常见的创新有三种：管理方法改进，在现有产品线引入新产品或者开发全新产品。（表 VI.1.1）

The top three common manners for our respondents to innovate is to implement new management techniques and to introduce a new product in an already existing business line or in a new business line. (Chart VI.1.1).

**Chart VI.1.1 自 2011 年来，贵公司在哪些方面进行了创新？**  
**What types of innovation have you introduced since the beginning of 2011?**

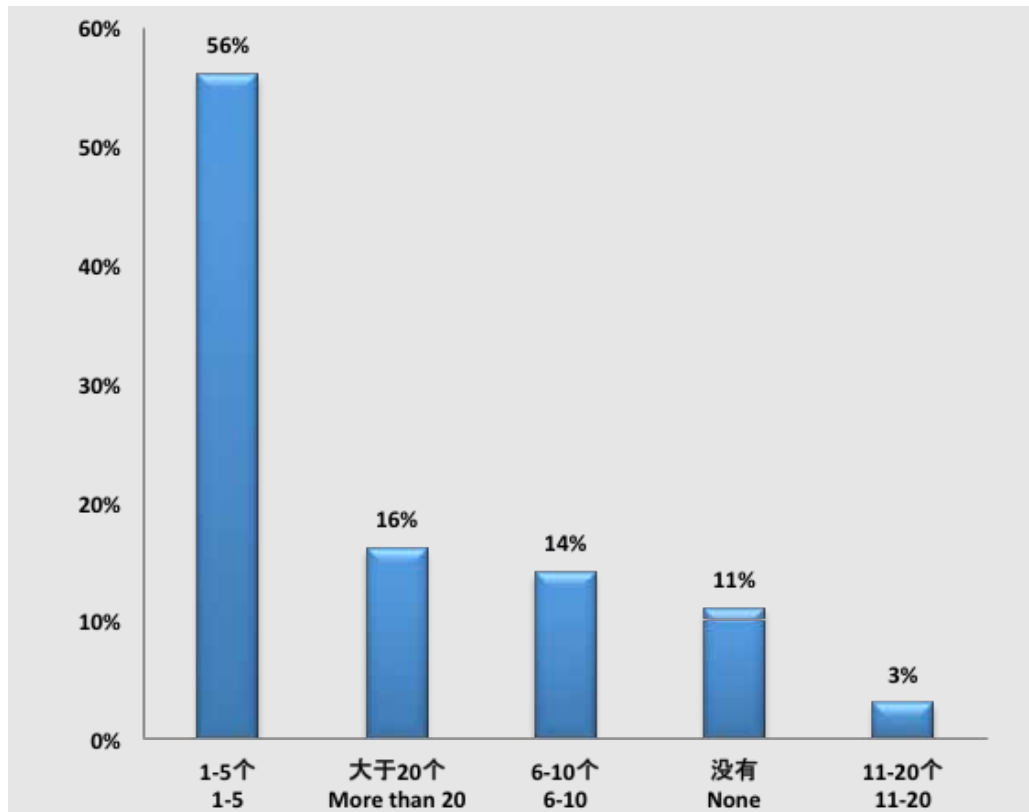


“其他”包括：商业模式创新。The "other" category includes: innovation of business model.

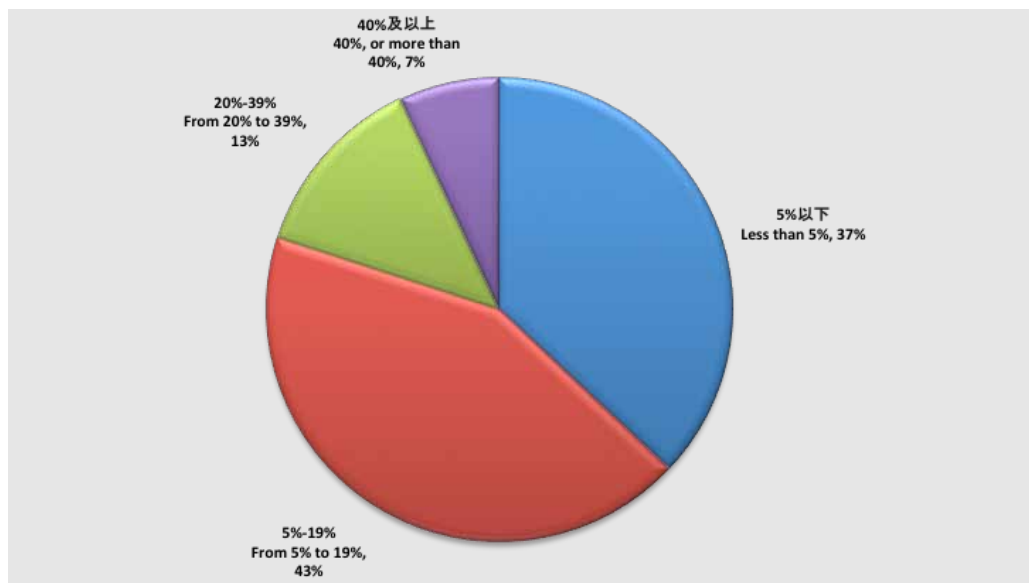
和前表相呼应的是，89% 的公司在 2011 年开发了新产品、服务。(表 VI.1.2) 在多数 (63%) 公司里，新产品、服务占销售收入 5% 以上。(表 VI.1.3)

In line with the previous chart, 89% of respondents launched new products/services in 2011. (Chart VI.1.2) In most companies (63%), new product/services account for more than 5% of total sales. (Chart VI.1.3)

**Chart VI.1.2 贵公司 2011 年开发了多少个新产品 / 服务? (N=265)**  
**How many new products/services have you introduced in 2011?**



**Chart VI.1.3 2011 年开发的新产品约占销售收入的百分之几? (N=235)**  
**For new products/services introduced in 2011, what percent of total sales do they account for?**



受访公司的研发中心大多设在沿海省市，上海和北京，40% 的受访者计划在未来两年内在中国开设新的研发中心。新的研发中心的选址也大致相同。(表 VI.1.4/1.5)

The companies interviewed tend to locate the R&D centers in coastal provinces, Shanghai and Beijing 40% of the respondents plan to open new R&D centers in China in the next 2 years. And the planned location of their new R&D centers are more or less the same. (Chart VI.1.4/1.5)

#### Chart VI.1.4 贵公司的研发中心位于中国哪个地区？

##### Where are you R&D centers in China located in?

答案 /Answer	人数 /Response
上海 Shanghai	86
江苏, 浙江, 安徽, 福建, 江西, 山东 Jiangsu, Zhejiang, Anhui, Fujian, Jiangxi, Shandong	57
北京 Beijing	47
深圳 Shenzhen	23
广东, 广西, 海南 Guangdong, Guangxi, Hainan	19
天津 Tianjin	7
河南, 湖北, 湖南 Henan, Hubei, Hunan	7
四川, 贵州, 云南, 西藏 Sichuan, Guizhou, Yunnan, Tibet	7
重庆 Chongqing	3
河北, 山西, 内蒙古 Hebei, Shanxi, Inner Mongolia	3
陕西, 甘肃, 青海, 宁夏, 新疆 Shaanxi, Gansu, Qinghai, Ningxia, Xinjiang	3
辽宁, 吉林, 黑龙江 Liaoning, Jiling, Heilongjiang	2

#### Chart VI.1.5 贵公司未来两年新设的国内研发中心位于？

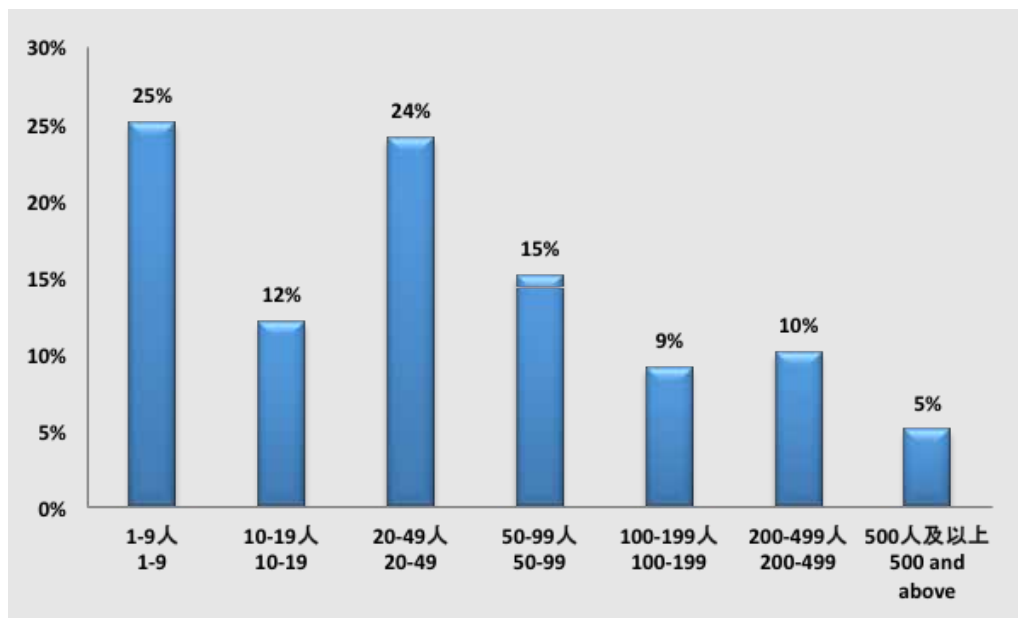
##### Where do you plan to open new R&D center in China in the next 2 years?

答案 /Answer	人数 /Response
上海 Shanghai	31
江苏, 浙江, 安徽, 附件, 江西, 山东 Jiangsu, Zhejiang, Anhui, Fujian, Jiangxi, Shandong	22
北京 Beijing	19
四川, 贵州, 云南, 西藏 Sichuan, Guizhou, Yunnan, Tibet	7
河南, 湖北, 湖南 Henan, Hubei, Hunan	6
深圳 Shenzhen	5
重庆 Chongqing	4
广东, 广西, 海南 Guangdong, Guangxi, Hainan	4
陕西, 甘肃, 青海, 宁夏, 新疆 Shaanxi, Gansu, Qinghai, Ningxia, Xinjiang	4
天津 Tianjin	3
辽宁, 吉林, 黑龙江 Liaoning, Jiling, Heilongjiang	3

研发中心的规模不同，因此员工人数和每年的经费也不同。总的来说，多数公司的研发经费占每年销售收入的比例低于5%。我们推测，随着公司意识到研发的重要性，这个比例应该会大大提高。(表 VI.1.6/1.7)

The size of the R&D centers varies, as do the number of employees and annual funding budgets. In general, most companies spend less than 5% of their annual sales to develop their R&D activities. We would expect this figure to escalate when companies realize the importance of innovation and R&D. (Charts VI.1.6 and VI.1.7).

**Chart VI.1.6 贵公司在中国的研发中心有多少研究人员? (N=204)**  
**How many people are there in your R&D center in China?**



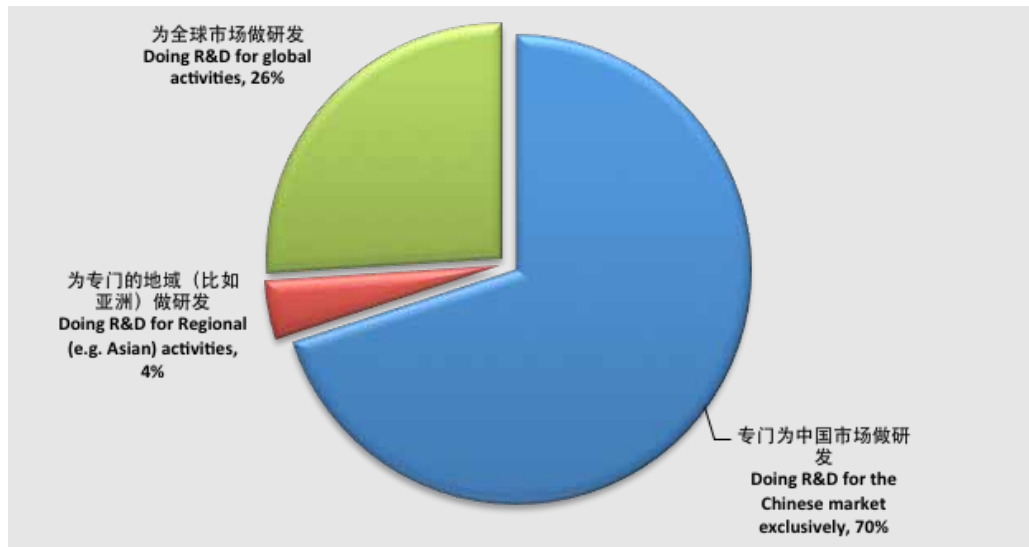
**Chart VI.1.7 贵公司每年研发支出约占销售收入的百分之几? (N=209)**  
**What is your annual expenditure on R&D as a percent of revenues?**

答案 / Answer	人数 / Response	百分比 / %
5% 以下 / Below 5%	112	54%
5-10%	60	29%
10% 以上 / Above 10%	37	18%

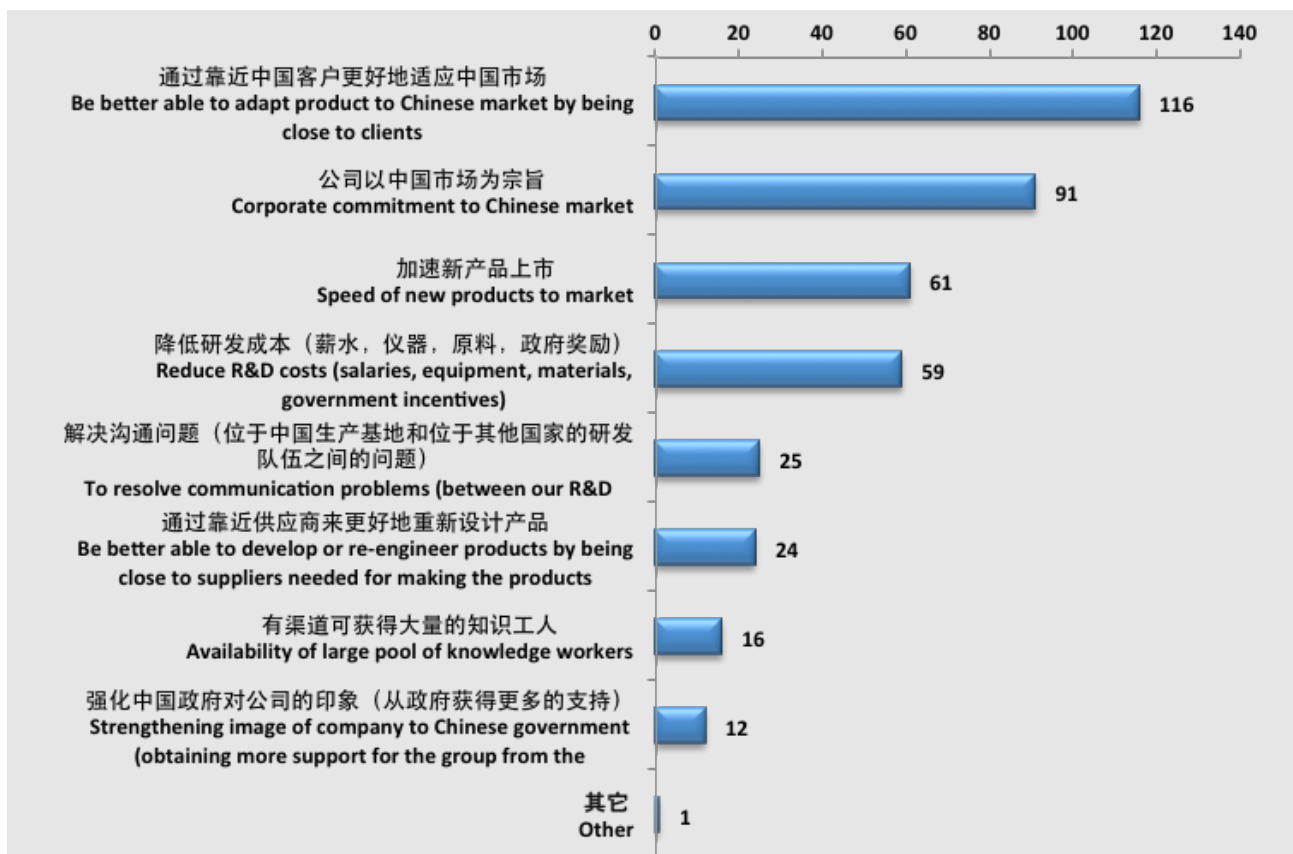
为配合公司服务中国市场的宗旨，多数受访企业专门为中国市场做研发，以更好地适应中国市场。这个发现表明多数受访公司还是专注于中国市场，而有 26% 的公司面对全球市场开发新产品。（表 VI.1.7/1.8）

In line with the corporate commitment to Chinese market, the majority of the companies interviewed conduct the R&D activities for Chinese market exclusively to be better able to adapt to market. This finding indicates that most of companies interviewed still focus on Chinese market while a certain proportion of companies (26%) aim at global market. (Chart VI.1.7/1.8)

**Chart VI.1.7 贵公司的研发活动是针对哪个市场 / 地域 ? (N=207)**  
**For what market(s)/region(s) are or will your R&D activities for?**



**Chart VI.1.8 下列哪些原因决定了贵公司把研发机构或研发中心设在中国?**  
**How important are the following reasons for having opened or your plan to open an R&D unit or center in China?**



只有 13% 的受访者所在企业在海外设有或计划设立研发中心。主要位于美国，德国，印度等国。（表 VI.1.9）

Only 13% of the respondents have or plan to open R&D centers outside of China. They are mostly located in U.S., Germany and India etc. (Chart VI.1.9)

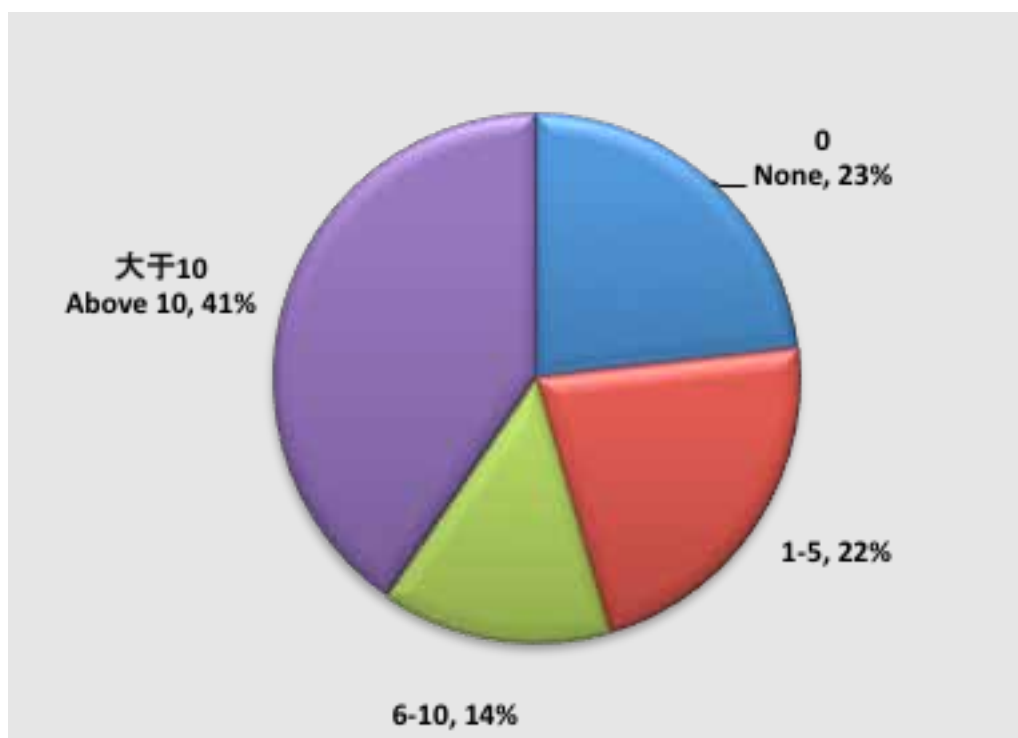
**Chart VI.1.9 您在哪些国家或地区设立了（或计划设立）海外研发中心？**  
**Where will be your overseas R&D center located in?**

答案 /Answer	人数 /Response
美国 US	7
德国 Germany	4
印度 India	3
法国 France	3
日本 Japan	3
英国 UK	2
香港特别行政区 H.K.(S.A.R.)	2
加拿大 Canada	1
其它东亚和东南亚国家和地区 Other East Asia Southeast Asia	1
台湾 Taiwan(China)	1
其它东欧国家 Other Eastern Europe	1
其它西欧国家 Other Western Europe	1

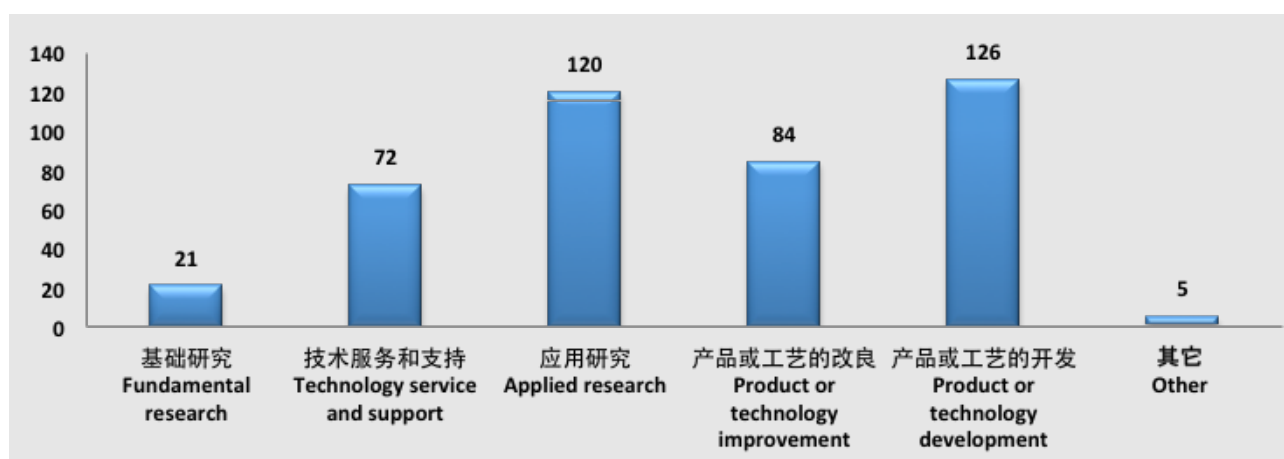
大多数受访公司拥有大于 10 项专利，受访公司的研发类型主要有应用研究，产品和工艺开发。（表 VI.1.10/11）

When we asked the surveyed companies how many patents they registered in the past 2 years, most of them registered more than 10 patents. The dominant types of R&D activities are applied research and product or technology development. (Chart VI.1.10/11).

**Chart VI.1.10 贵公司（大约）拥有多少专利？ (N=209)**  
**Have you obtained any patent in the last 2 years?**



**Chart VI.1.12 贵公司进行的研发属于哪一类型？**  
**What type of R& D activities do you do?**



“其他”包括：投资咨询，进口药品注册，设计。

The "other" category includes: investment consulting, registration of imported drug, design.

## VI.2 知识产权

# Intellectual Property Right

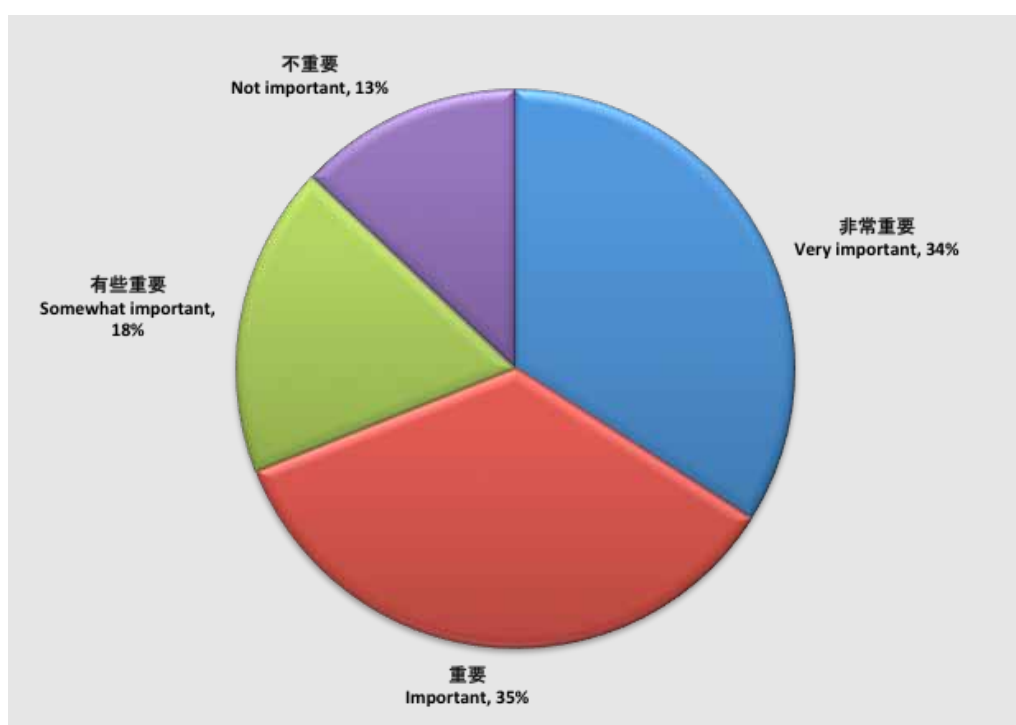
多数受访公司收到知识产权侵权的影响。通常侵权人为国内竞争对手或者公司内部员工，公司的客户或者供应商。这种现象影响受访公司的业绩，甚至造成很大损害。他们通过注册商标，人力资源管理等手段保护知识产权。虽然政府在知识产权保护方面已经取得一些成就，受访公司认为还远远不够。94%的受访公司认为知识产权状况没有得到改善。

The majority of the respondents are affected by intellectual property infringement. In most cases, a Chinese manufacturer or its own employees/ suppliers/clients are behind the problem. This situation has an impact on our respondents' results, severe in some cases. To protect their IPR they advocate for registering IP and HR management actions. Although the government is making positive advances in IPR protection, the perception of our executives on this regard is that those initiatives are insufficient and/or ineffective, 94% of the respondents believe that the situation has not been improved.

在受访公司中，多数（87%）认为知识产权很重要，应该受到保护。（表 VI.2.1）

Among the companies participating in the survey, the majority (87%) believe that intellectual property has a discernible impact on their business results and therefore should be protected (Chart VI.2.1).

**Chart VI.2.1 知识产权对贵公司是否重要？ (N=269)**  
**How important is IP (intellectual property) to your business?**

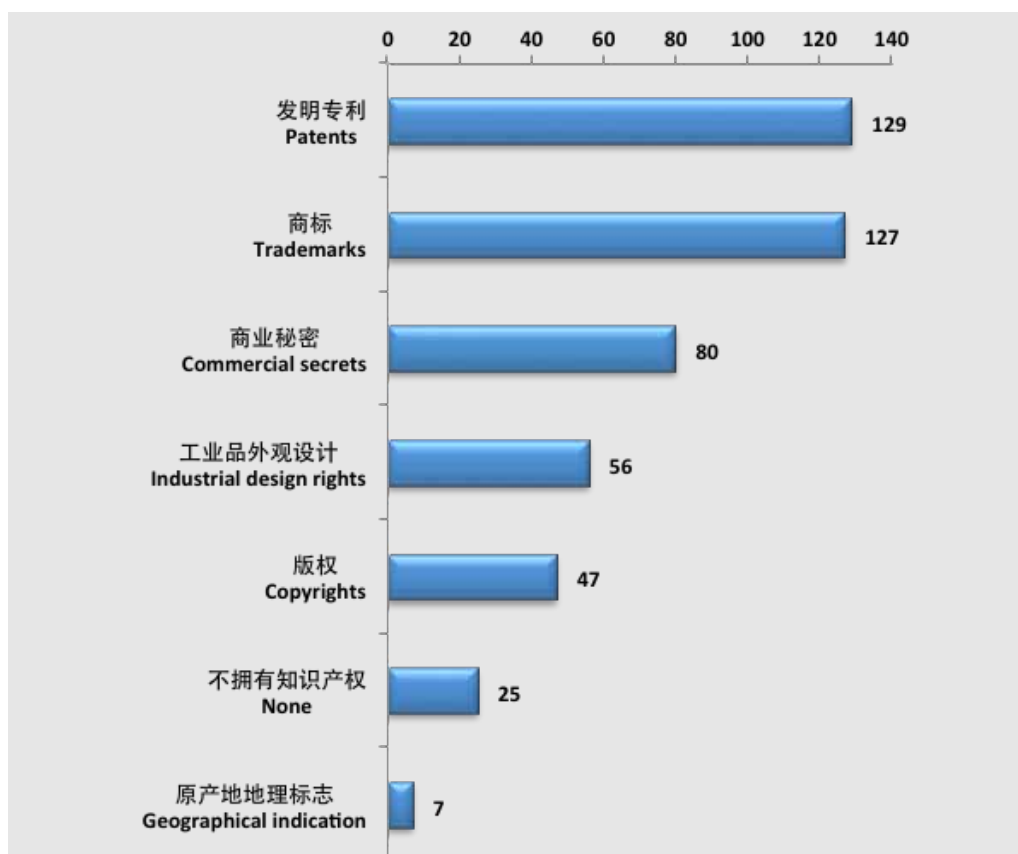




谈及知识产权的类型，多数公司拥有专利和商标。版权与他们相比排名比较靠后。（表 VI.2.2）

Regarding the type of IPR, the majority of the respondents own patents and trademarks. Copyrights have ended up further down the list (Chart VI.2.2).

**Chart VI.2.2 贵公司拥有哪种类型的知识产权？**  
**What type of IP do you own?**



在拥有知识产权的公司中，只有 16% 的企业知识产权从未受到过侵犯。大约 12% 的公司经常被侵犯，3% 的公司宣称他们的知识产权总是被侵犯。知识产权侵权损害公司业务并对受访公司的利润有不良影响。只有 1% 的公司认为侵权没有对他们造成损害。2% 的认为损害非常严重而 23% 的认为有损害。虽然中国已经采取了很多措施保护知识产权，但还不够有效。48% 的公司认为侵权和过去三年相比没有改善，42% 的公司甚至认为是恶化了。为了推进创新和研发，政府还需要在这方面更加努力。（表 VI.2.3、2.4、2.5、2.6）

Amongst the respondents who own IP, only 16% of them claim that their intellectual property has never been infringed. About 12% of them report that it is often violated and 3% of the sample state that infringement happens all the time. IP infringement damages business and has a negative impact on the profits of our respondents. Only 1% of them hold the view that IP violation has not caused them any harm. 2% report that the damage has been very serious and 23% say it has been serious. Although new initiatives have been put into place to protect this kind of property ownership, most companies interviewed (48%) believe that IP infringement remains the same compared to previous years. And 42% of them think that IP the situation is getting worse. Government's plans to protect intellectual rights seem to be insufficient and ineffective. It appears that more work needs to be done in this area by the Chinese government to promote innovation and R&D. (Chart VI.2.3/2.4/2.5/6)

Chart VI.2.3 2011年贵公司的知识产权是否经常受到侵犯？(N=229)  
How often has your IP been infringed in 2011?

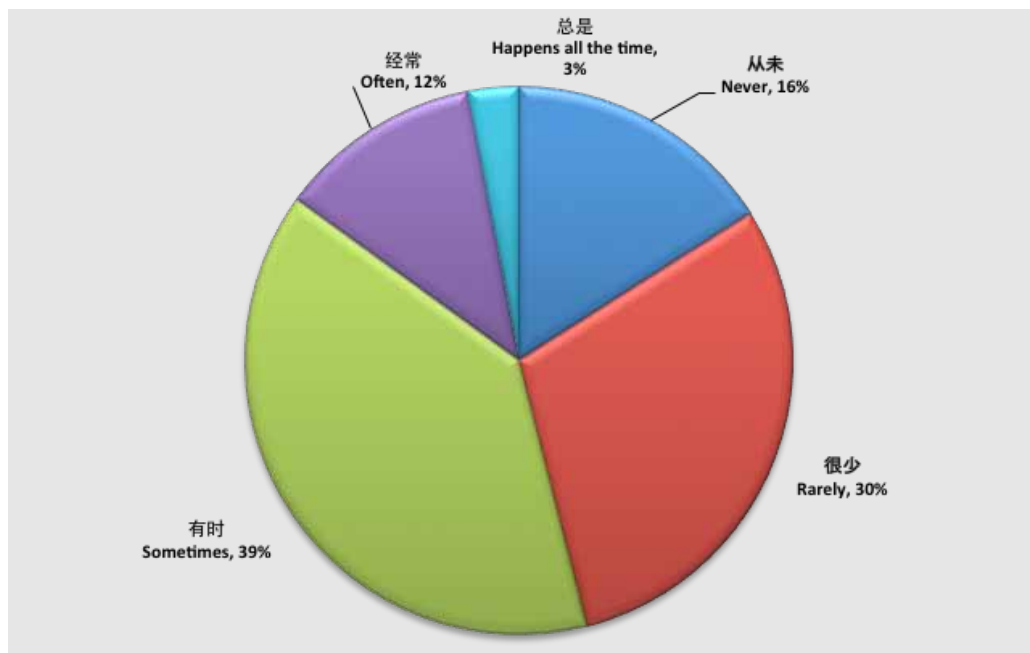
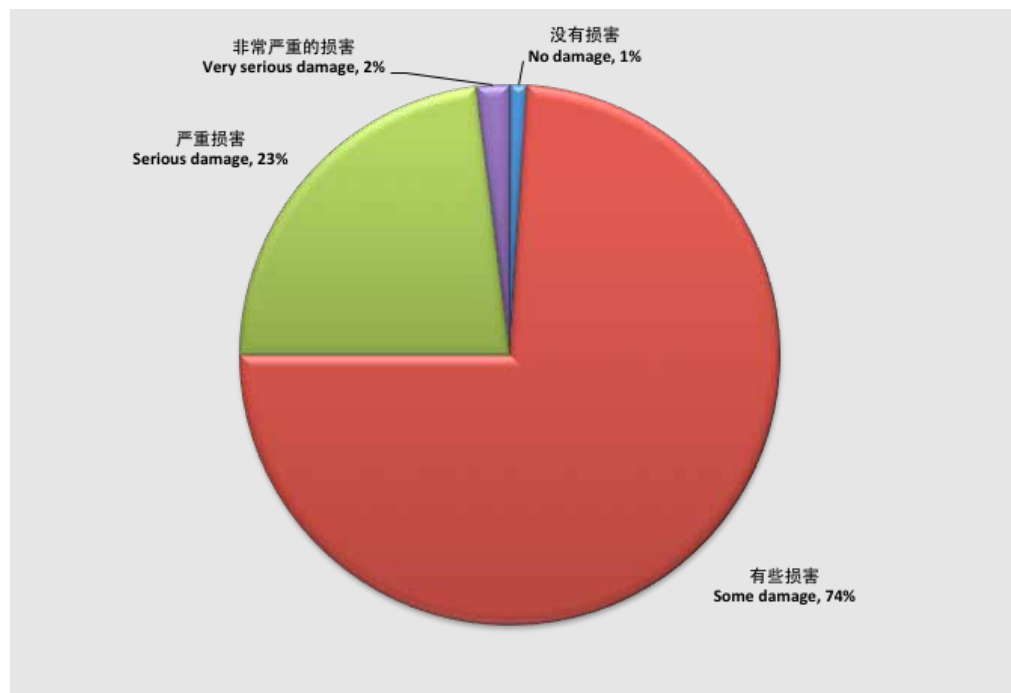
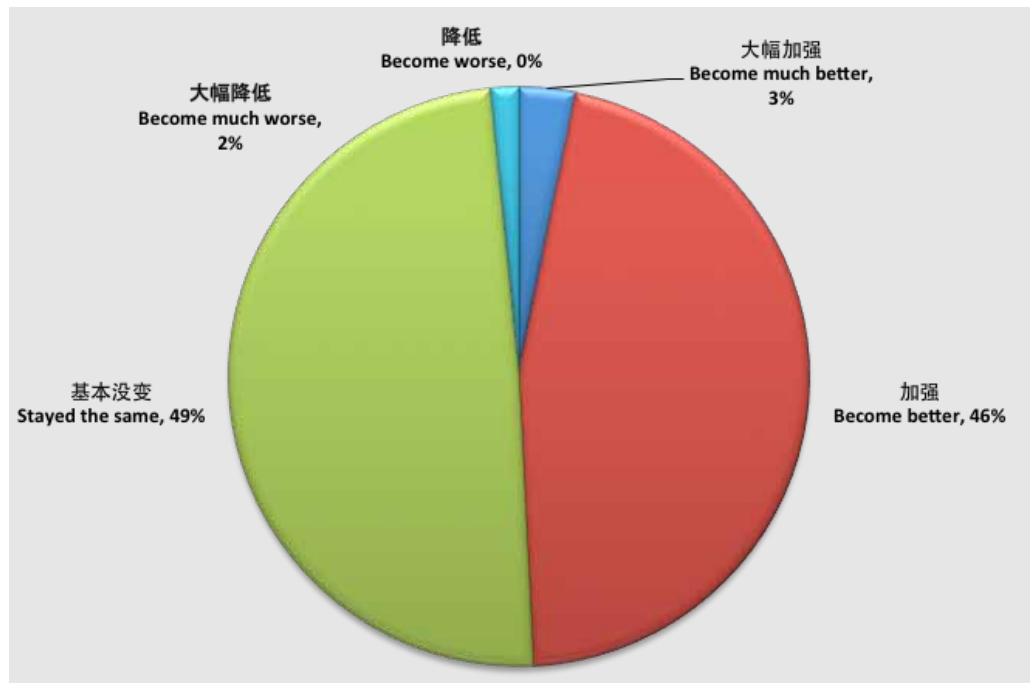


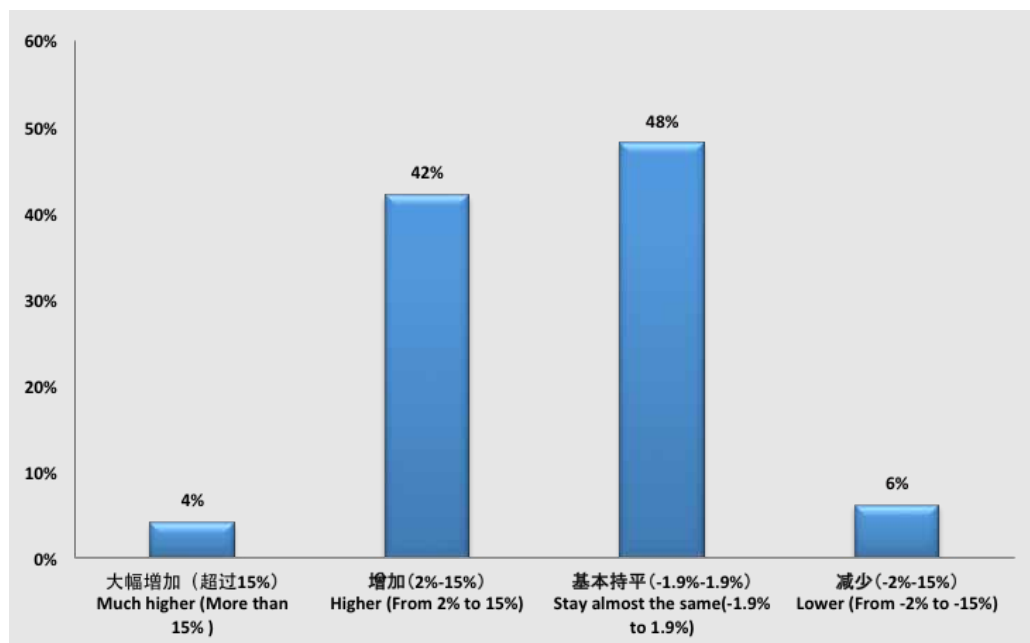
Chart VI.2.4 知识产权被侵犯对贵公司业务造成的损害有多大？(N=124)  
What is the extent of damage caused by IP infringement in your business?



**Chart VI.2.5** 您认为近三年来政府在知识产权保护方面的力度是否有所加强？ (N=126)  
**In the past three years, how do you describe the IPR protection from the government?**



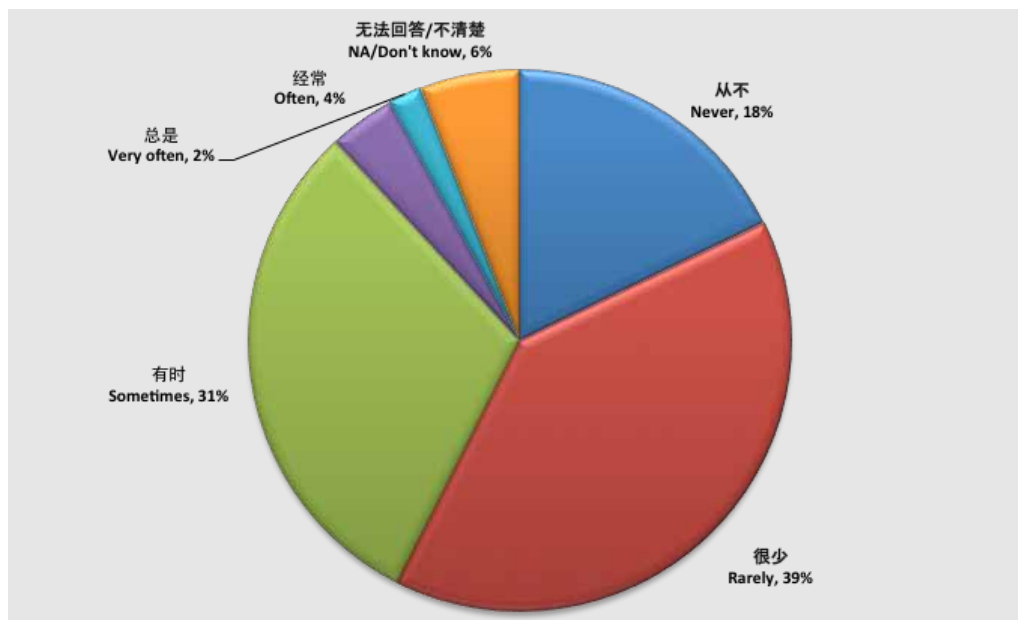
**Chart VI.2.6** 相比过去三年，贵公司知识产权被侵犯的次数？ (N=124)  
**Compared with the past three years, would you consider that the amount of IP infringement in your business has:**



多数公司从未（18%）或者很少（39%）把知识产权侵权诉诸法律。看来受访公司不愿意为了保护知识产权在法庭上花费时间和金钱。（表 VI.2.7）

The majority of the respondents never (18%) or rarely (39%) take legal action to protect their IPR. It seems that our respondents opt not spend time and money on the courts to fight for their IP rights (Chart VI.2.7).

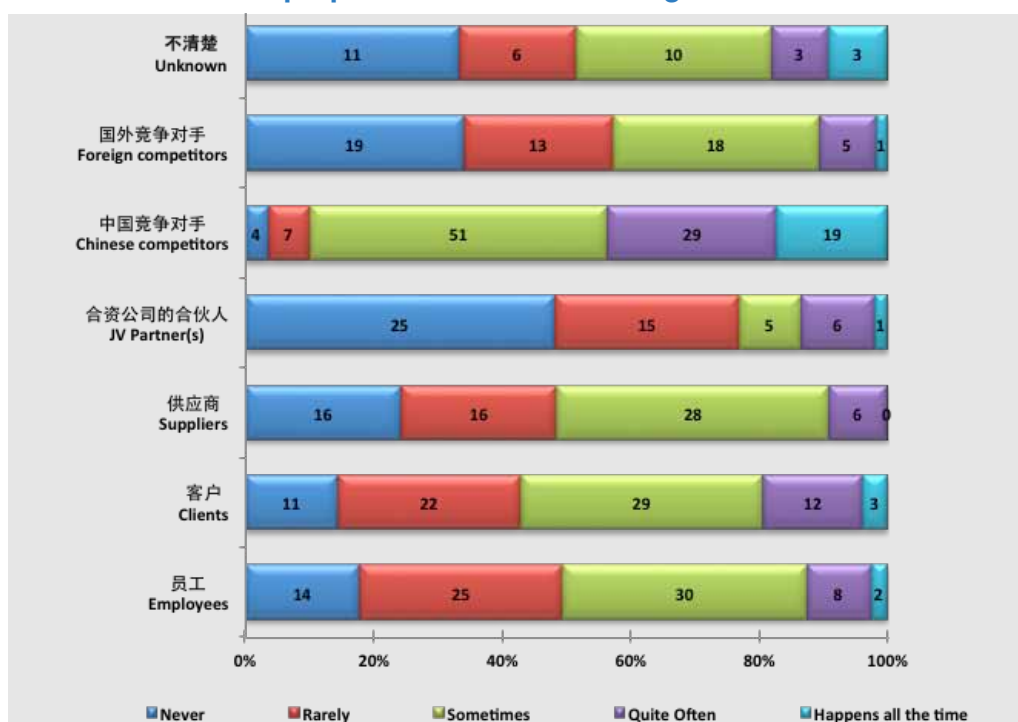
**Chart VI.2.7 贵公司是否把知识产权侵权诉诸法律？ (N=125)**  
**How often do you take IP cases to court?**



受访公司表示，多数情况下，国内竞争对手，本公司员工，供应商和客户是知识产权的侵犯者。（表 VI.2.8）

According to our executives, most of the time Chinese companies are behind IP infringement, followed closely by suppliers, clients and employees. (Chart VI.2.8).

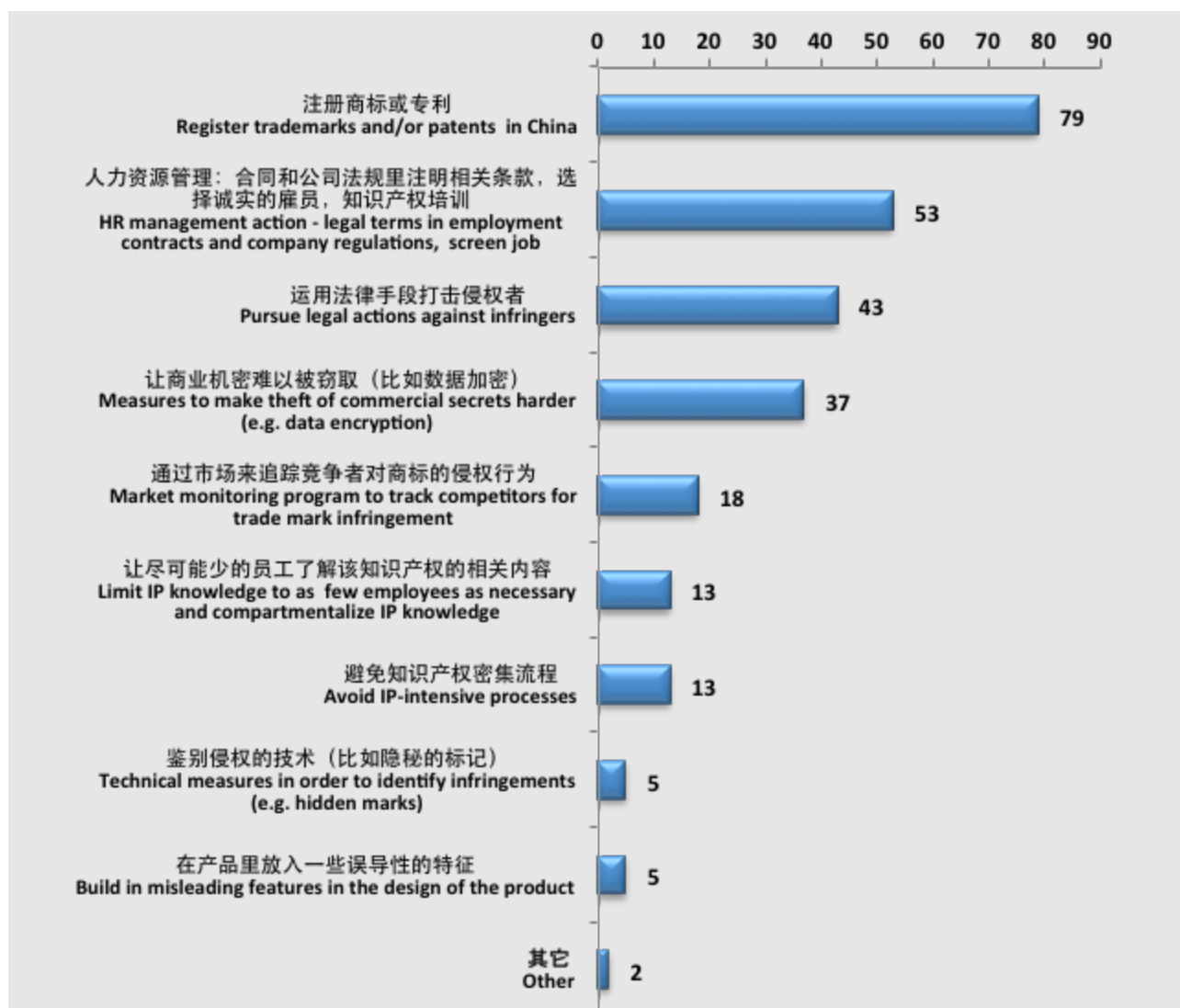
**Chart VI.2.8 哪些人是知识产权的侵犯者？**  
**Who have been the perpetrators of the IP infringements?**



受访公司表示，在中国最有效的保护知识产权的方式是注册商标或专利。第二是采取一些人力资源管理的手段如员工合同条款，选择诚实的员工以及提供知识产权培训。（表 VI.2.9）

According to the respondents, the most effective way to protect intellectual property in China is to register it. Second on the list are HR actions such as employment contracts, checking for honesty in the hiring process and providing IPR training (Chart VI.2.9).

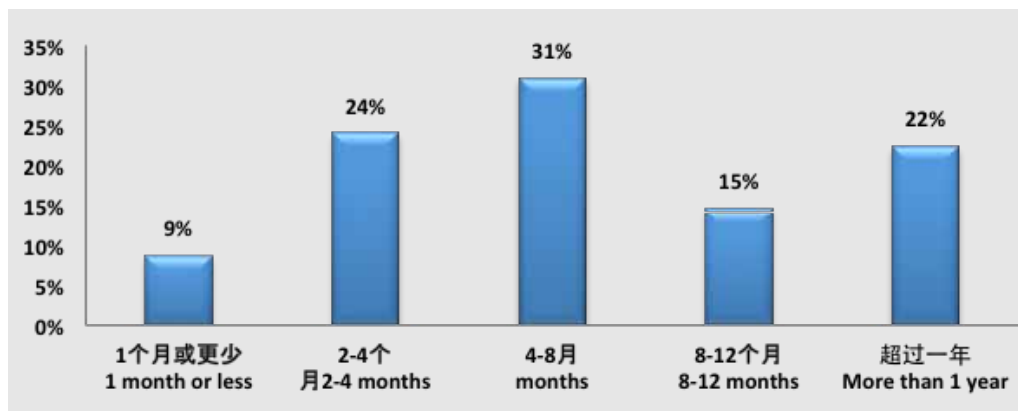
**Chart VI.2.9 在中国，保护知识产权的有效方式有哪些？**  
**Which are the most effective measures you use to protect your Intellectual Property in China?**



根据问卷结果分析，在中国，63% 的竞争对手平均需要不到 8 个月的时间就可以推出类似的产品。为了走在这些竞争对手前面，公司的创新进程压力很大。（表 VI.2.10）

According to our sample, 63% of the competitors only need less than 8 months to launch similar products. This fact puts pressure on the innovation process in order to keep ahead of those competitors (Chart VI.2.10).

**Chart VI.2.10 在贵公司新产品上市以后，多久会出现类似的产品或者复制品？ (N=117)**  
**How long after one of your new products has come to the market in China do you see the competition releasing the same kind of product, or copies?**



# 第七部分

## Section VII

### 外贸，投资与融资

### FOREIGN TRADE, INVESTMENT AND FINANCING

这部分内容涵盖出口，投资计划和融资情况，使读者对受访公司在这几方面的情况有大致了解：

- 出口：与 2010 年比较，出口目的地
- 投资：投资计划，挑战和选址
- 融资：资金来源，融资困难

This section includes information about exports, future investment plans and financing:

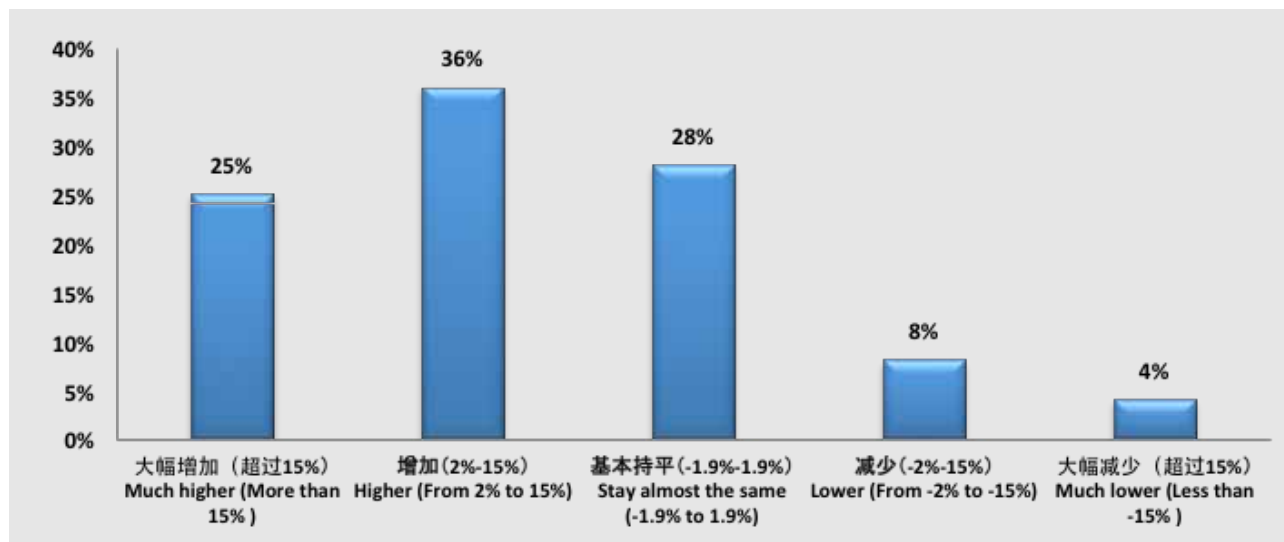
- Exports: compared to previous year and main destinations.
- Investment: future plans, challenges and locations.
- Financing: source of finance, difficulties.

The purpose of this section is to give a general idea of our respondents' export performance, investment plans and their financing situation.

46% 的受访公司有出口业务，平均而言出口额占到他们营业总额的 28.48%。这些公司中，61% 的 2011 年的出口收入较 2010 年增加，28% 的与 2010 年持平（表 VII.1）

46% of our respondents have export operations and exports represent 28.48% of their total revenues. Of these, they report exporting more (61%) or the same (28%) in 2011 than in 2010 approximately (Chart VII.1).

**Chart VII.1 贵公司 2011 年的出口收入较 2010 年 ? (N=120)**  
**How does your exports in 2011 compare to 2010?**





有出口业务的受访公司主要出口到其它东亚，东南亚国家（尤其是日本），美国，西欧（特别是德国），印度和中东等国家。（表 VII.2）

Most of the companies' exports were to other east and Southeast Asian countries (especially Japan), US, Western Europe (particularly Germany), India and Middle East (Chart VII.2).

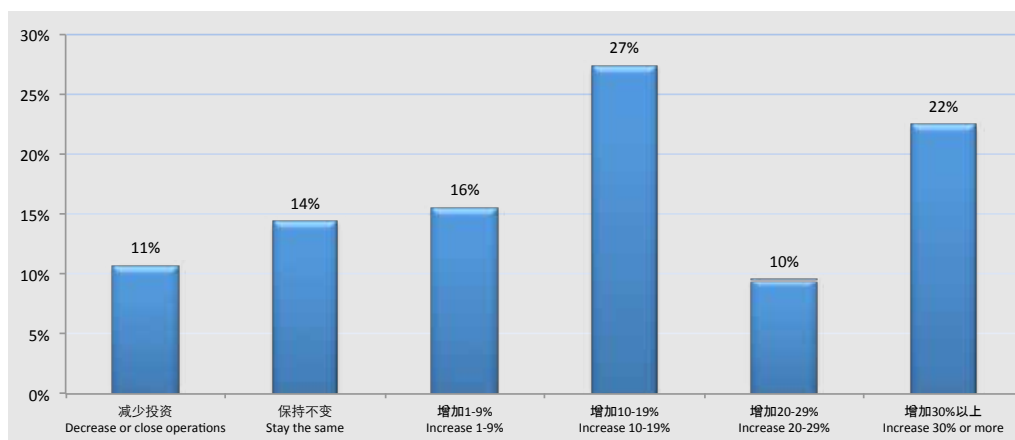
**Chart VII.2 贵公司主要出口到哪些国家？**  
**Which is your key export market?**

答案 /Answer	人数 /Response
其它东南亚国家 Other East and Southeast Asian Countries	53
美国 US	48
其它西欧国家 Other Western Europe	35
印度 India	31
中东（包括土耳其） Middle East(incl. Turkey)	31
日本 Japan	28
德国 Germany	26
拉丁美洲（包括墨西哥和巴西） Latin America (including Mexico and Brazil)	23
俄罗斯 Russia	22
韩国 South Korea	22
中国台湾 Taiwan(China)	22
澳大利亚和新西兰 Australia and New Zealand	22
加拿大 Canada	20
英国 UK	19
香港 H.K.(S.A.R.)	18
其它南亚国家 Other South Asia Countries	17
巴基斯坦 Pakistan	16
法国 France	14
其它东欧国家 Other eastern Europe	13
中亚 Central Asia	13
其它美洲国家 Other American countries	10
其它 Other	5

75% 的受访企业计划增加投资，这进一步证明了他们对中国商业未来有信心。(表 VII.3)

75% of the companies interviewed plan to increase the investment. This proves they are confident about the business future in China. (VII.3)

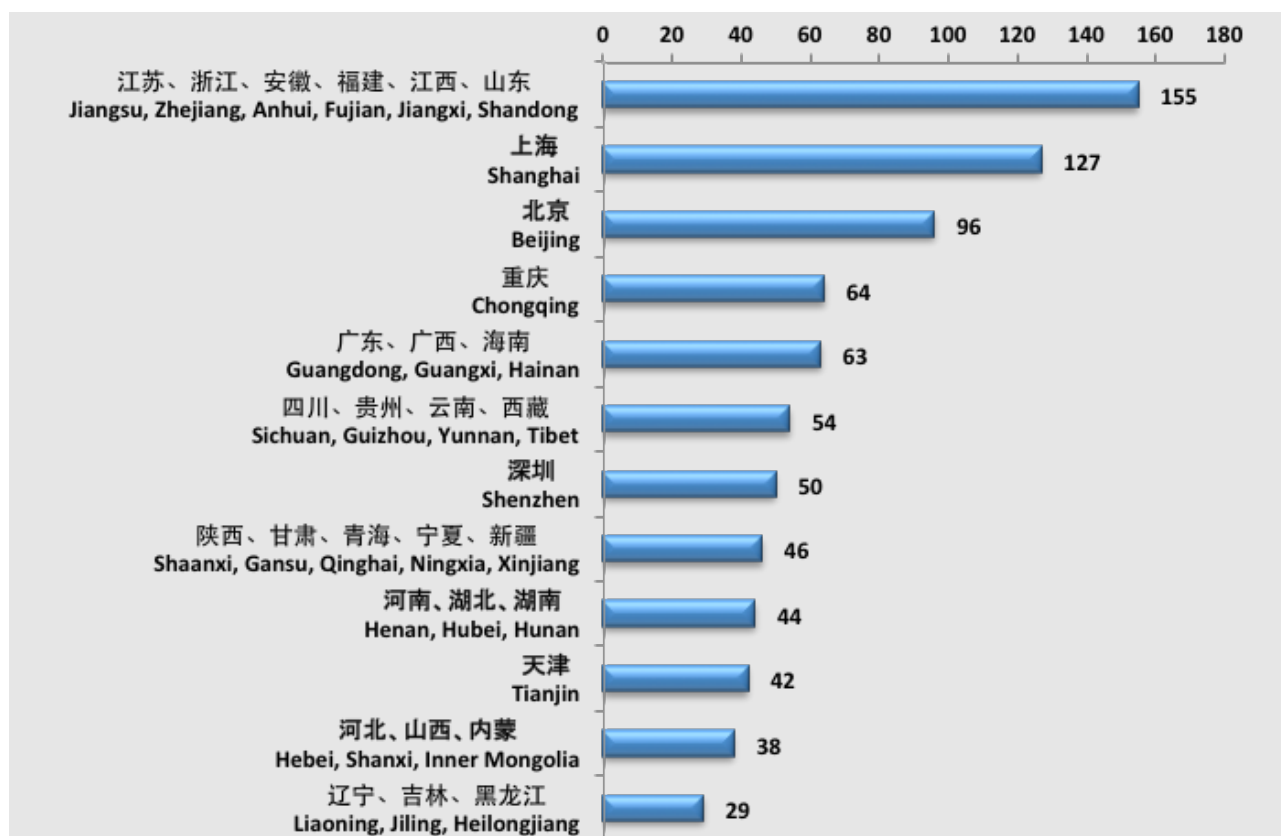
**Chart VII.3 2012 年贵公司有何投资计划? (N=347)**  
**What investments do you plan for 2012?**



虽然很多公司西迁，受访公司中大多数还是打算在东部沿海以及大城市如北京、上海投资 (表 VII.4)

Although some companies are moving westward, the majority of the investment will be done in the Eastern Coastal provinces and the big cities (Shanghai, Beijing) (Chart VII.4).

**Chart VII.4 未来三年中，贵公司打算在国内哪些地区进行投资?**  
**Where in China do you plan to invest in the next 3 years?**



29% 的受访者表示在海外有投资，主要在美国，加拿大，拉美国家等地，投资情况不错，遇到的主要困难是文化差异。（表 VII.5/6/7）

29% of the respondents have investment abroad, mainly in U.S., Canada and Latin America, etc. And the results are good. The main challenge of doing business there is cultural difference. (Chart VII.5/6/7)

### Chart VII.5 您在海外哪些地方有投资？

#### Where are your actual abroad investments located?

答案 /Answer	人数 /Response
美国 US	36
加拿大 Canada	10
拉美国家（包括墨西哥） Latin America (including Mexico and Brazil)	10
其他美洲国家 Other American countries	2
德国 Germany	12
英国 UK	7
法国 France	3
其他西欧国家 Other Western Europe	8
俄罗斯 Russia	7
其他东欧国家 Other eastern Europe	2
日本 Japan	9
韩国 South Korea	8
台湾（中国） Taiwan (China)	10
香港特别行政区 H.K.(S.A.R)	14
其他东亚和东南亚国家 Other East and Southeast Asian Countries	21
印度 India	14
巴基斯坦 Pakistan	2
其他南亚国家 Other South Asia Countries	4
中东（包括土耳其） Middle East (incl. Turkey)	15
中亚 Central Asia	1
澳大利亚和新西兰 Australia and New Zealand	14
其他 Other,	11

Chart VII.6 您怎么评价在这些国家的投资情况？ (N=96)

How do you evaluate the results of your investments in those countries?

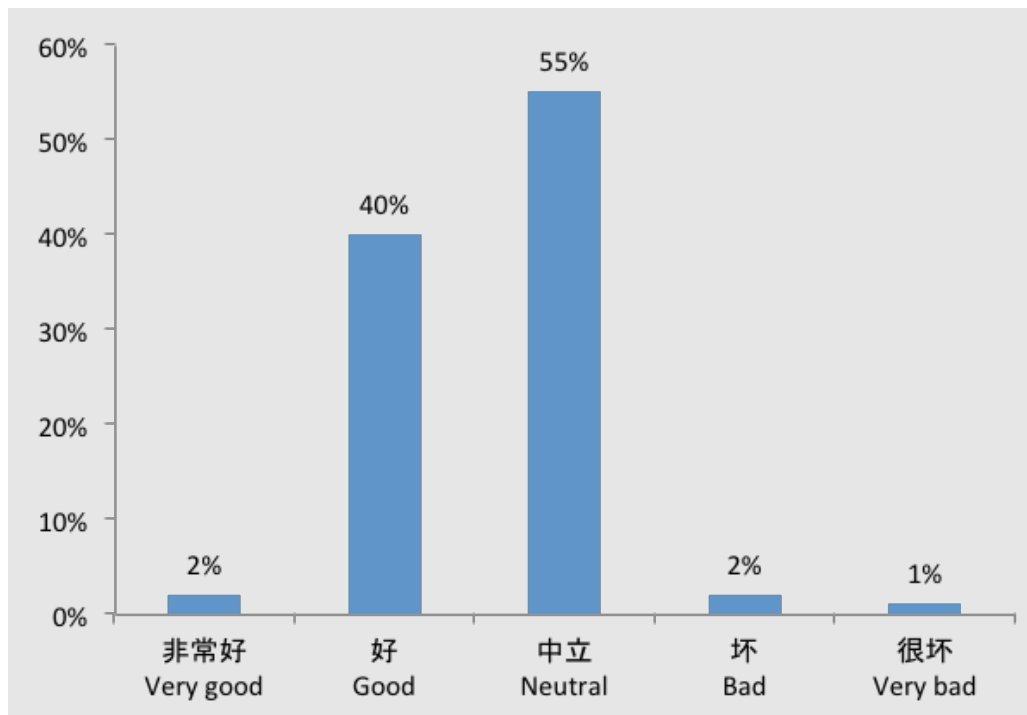
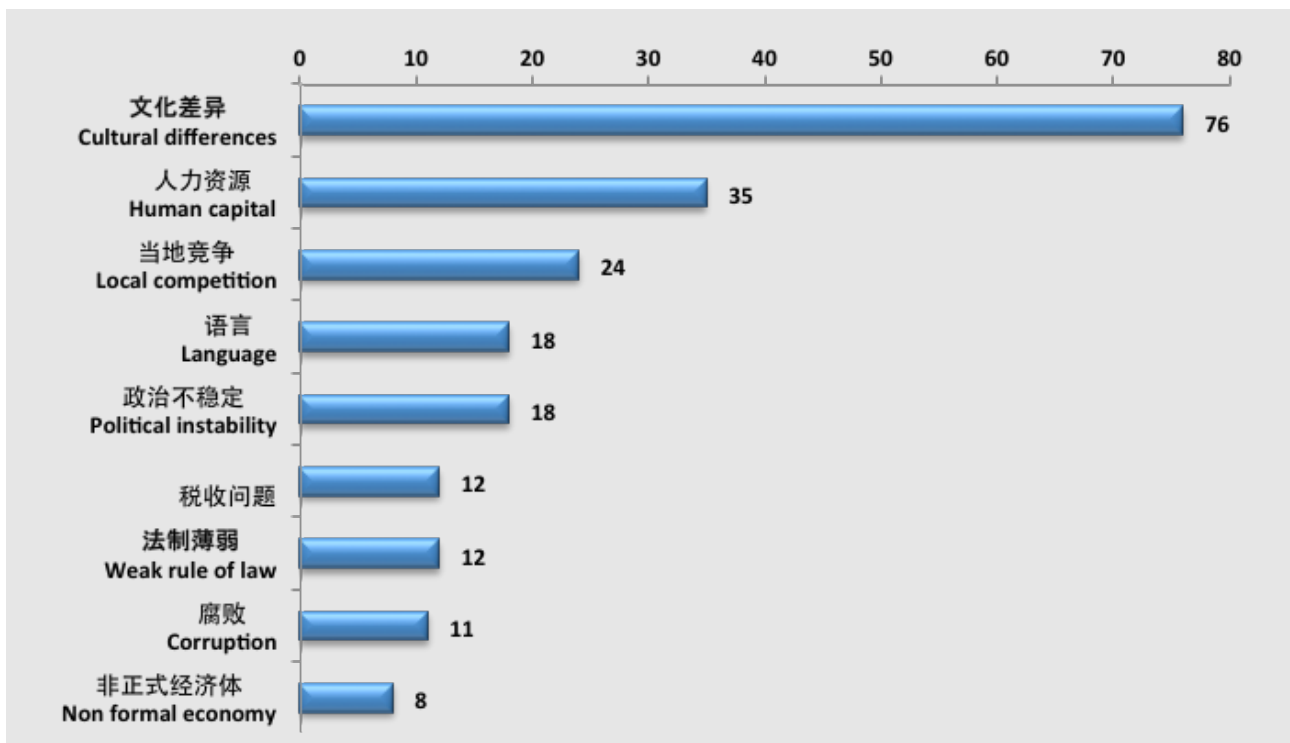


Chart VII.7 在这些国家做生意碰到的主要挑战是什么？

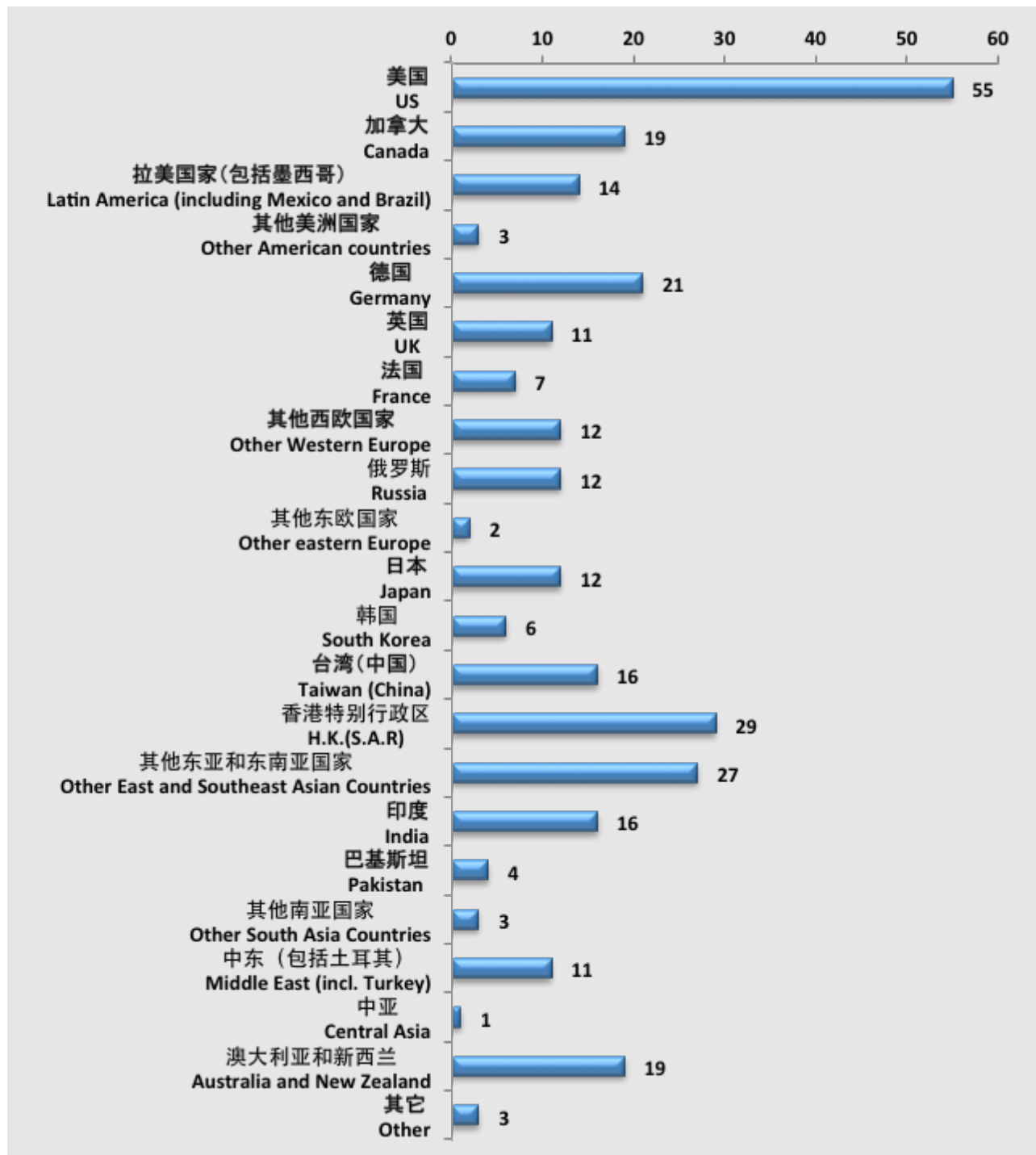
What are the major challenges of doing business in those countries?



41% 的受访者表示未来 3 年内投资海外。主要投资地为美国，香港，其它东亚和东南亚国家等。(表 VII.8/9)

(N=342) 41% of the respondents plan to invest abroad in the next 3 years. The main destinations are U.S., Hongkong, other East and Southeast countries etc. (Chart VII.8/9)

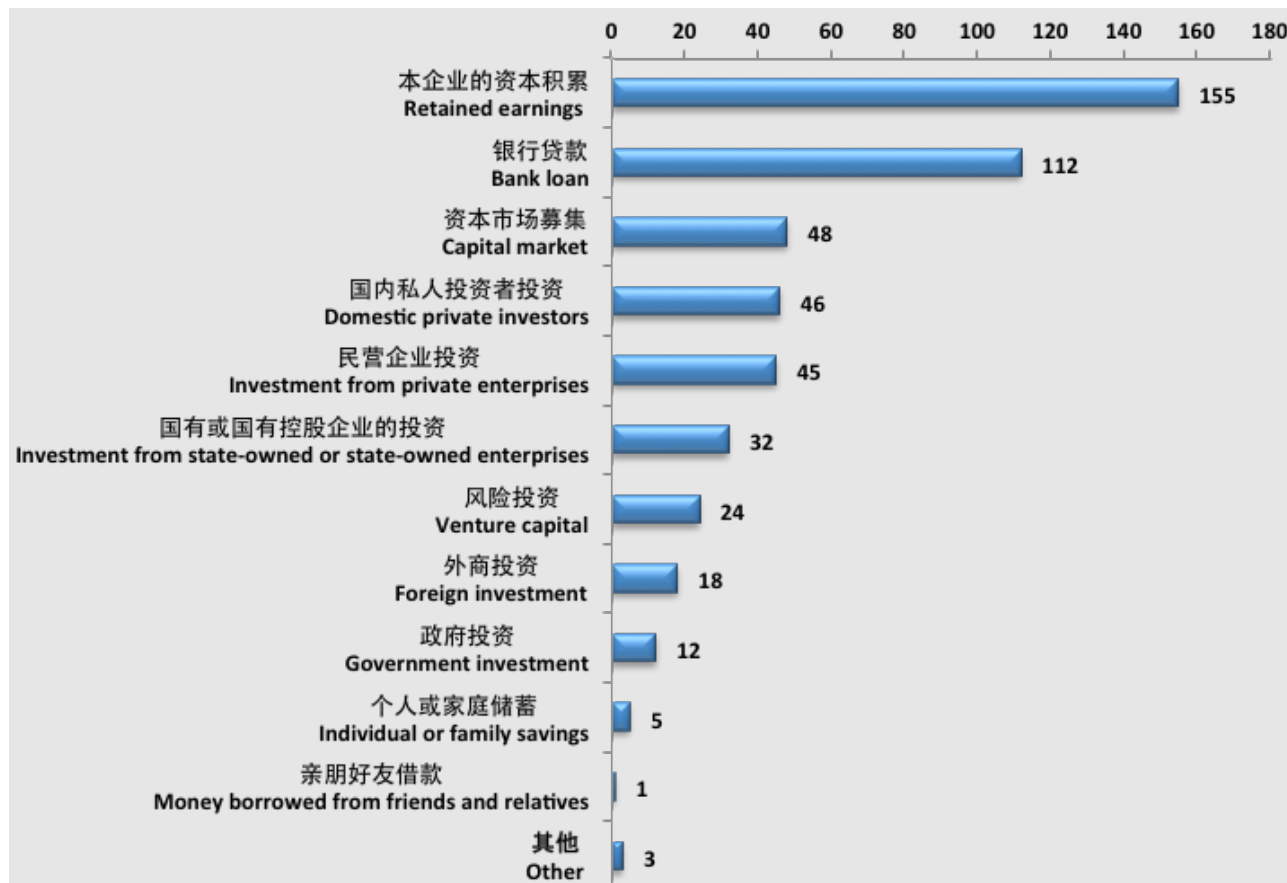
**Chart VII.8 您打算投资哪里?**  
Where do you plan to invest?



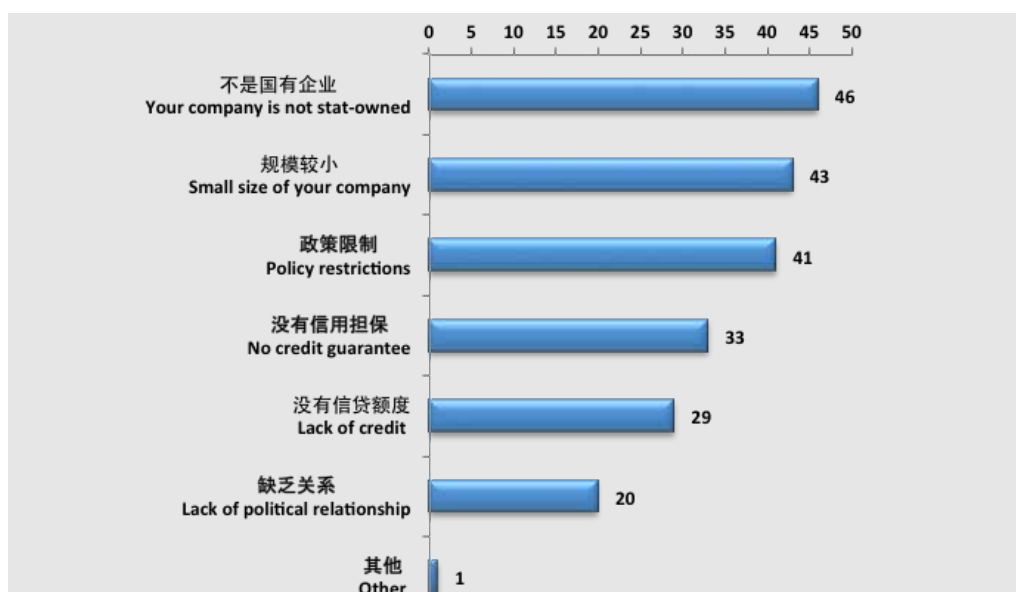
受访公司的主要资金来源是本企业的资金积累和银行贷款。多数受访者宣称获得融资（不论是银行还是非银行融资）困难或非常困难。融资主要受到企业规模，性质以及政策的制约。（表 VII.9/10/11/12）

The main source of funding of the companies interviewed are retained earnings and bank loan. It's difficult to obtain bank loan and non-bank finance because of the restrictions by legal status, size of the companies and the policy. (Chart VII.9/10/11/12)

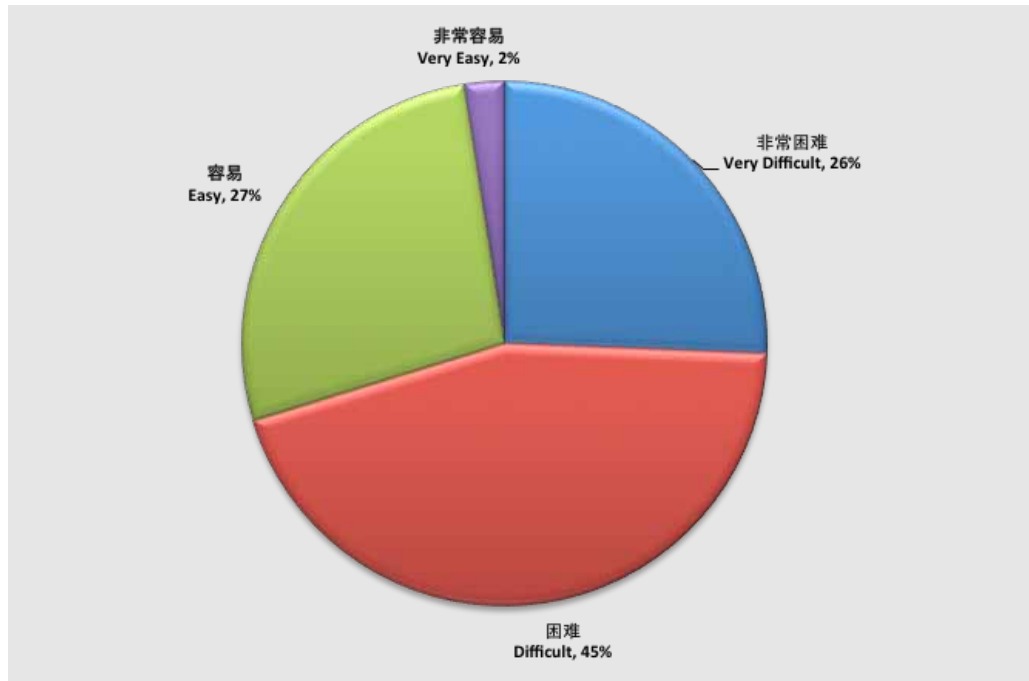
**Chart VII.9 贵公司目前经营与投资的主要资金来源是？**  
Which are the main sources of funding for your company?



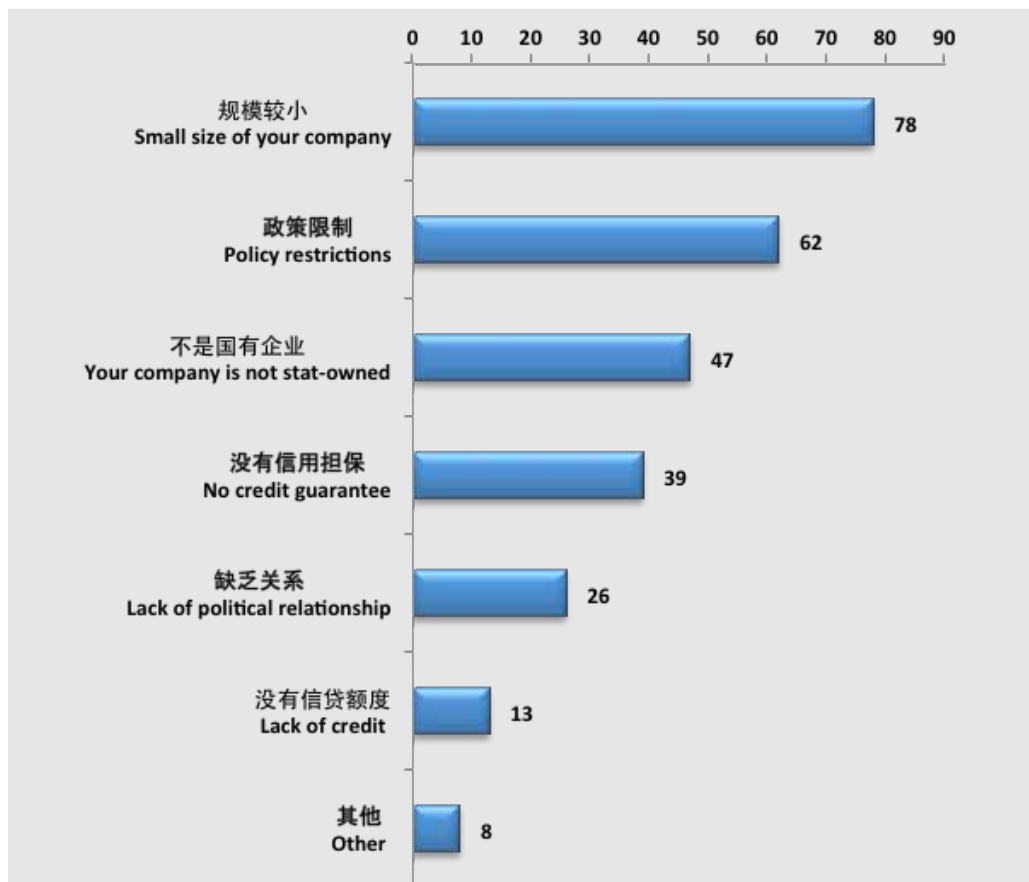
**Chart VII.10 贷款难的主要原因是什么？**  
What are the main reasons for not being able to obtain bank loans?



**Chart VII.11** 贵公司在非银行市场上（如股票市场，债券市场等）融资困难吗？ (N=242)  
**Your access to financial resources from non-bank sources (e.g. stock market, bond market and etc.) is?**



**Chart VII.12** 就贵公司而言，在非银行市场上融资难的主要原因是什么？  
**What are the main reasons for not being able to obtain non-bank finance?**



**谢谢！**  
**THANK YOU!**

**中欧国际工商学院教授团队**  
**The Research Team**