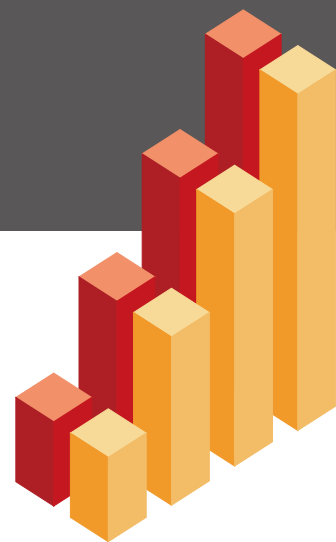


# 中外企业积极应对中国商业新环境



文 / 范悦安教授 许斌教授 周东生教授



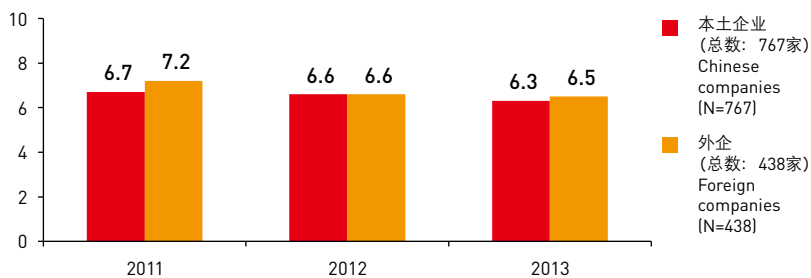
中国本土企业和在华外企正在积极调整战略以适应全新的中国商业环境。这是中欧国际工商学院‘2013年中国商务调查’的总体研究结论，其调研对象为来自本土企业和在华外企的一千多位高管。”

Chinese and foreign companies are actively adapting to China's new business environment. That's the overall finding from the *CEIBS Business in China Survey 2013* which polled executives from both groups in China.

近年来，中国经济面临劳动力成本不断上涨以及经济增速放缓的问题，因此在中国经营的本土企业及外资企业都必须调整商业战略，以适应新的商业环境。中欧国际工商学院“2013年中国商务调查”通过对1214位中外企业高管的问卷调查，验证了这一趋势。

一年一度的中欧“中国商务调查”是针对在中国经营的中外企业高管开展的调研活动。2013年的调查自2012年11月启动，历经两个月时间，共有1214位高管参与，其中768位来自本土企业，446位来自在华外企。这些高管中有539位是企业的首席执行官、总经理或企业所有者，388位是企业的副总裁、副总经理或者总监，其余则来自其他职能部门，包括人力资源、财务、市场营销、销售、运营以及研发部门。81%的受访高管来自中国大陆，3%来自台湾、香港或者澳门地区，16%来自其他28个不

图表1：您对贵公司明年在中国的经营能获成功有多大信心？  
Chart 1: How confident are you that your operations in China will be successful in the following year?



同国家。大部分受访高管（92%）拥有10年以上工作经验，拥有20年以上工作经验的高管比例也占到40%。这些层面广泛、经验丰富的受访者们为本次调研提供了丰富而极具参考价值的视角与洞见。

每家企业对中国新商业环境的认知首先反映在信心指数上。该指数的设定

基于问卷中一个特定的问题：“您对贵公司明年在中国的经营能获成功有多大信心？”在我们设定的0（完全没有信心）到10（完全有信心）这一区间内，本土企业对2013年的平均信心指数为6.3，低于对2011年的6.7和对2012年的6.6；在华外企对2013年的平均信心指数为6.5，低于对2011年的7.2和对2012年

# Companies Adapting to China's New BUSINESS CLIMATE

By Professors Juan Antonio Fernandez, Xu Bin and Zhou Dongsheng

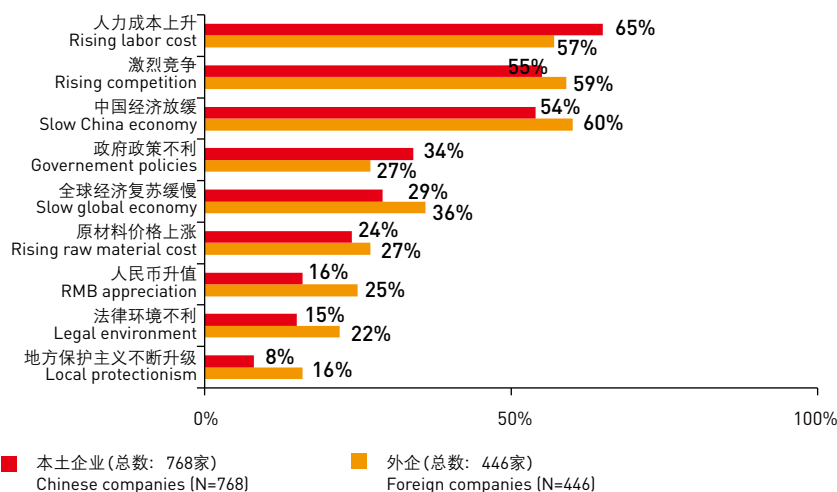
With the Chinese economy experiencing rising labour costs and slower growth rates in recent years, companies in China – both domestic and foreign – must adjust their business strategies to adapt to the new business environment. This trend is spot on, according to the *CEIBS Business in China Survey 2013* which polled 1,214 executives from Chinese and foreign companies doing business in China.

The *CEIBS Business in China Survey* is an annual poll of business executives working in China for both Chinese-owned

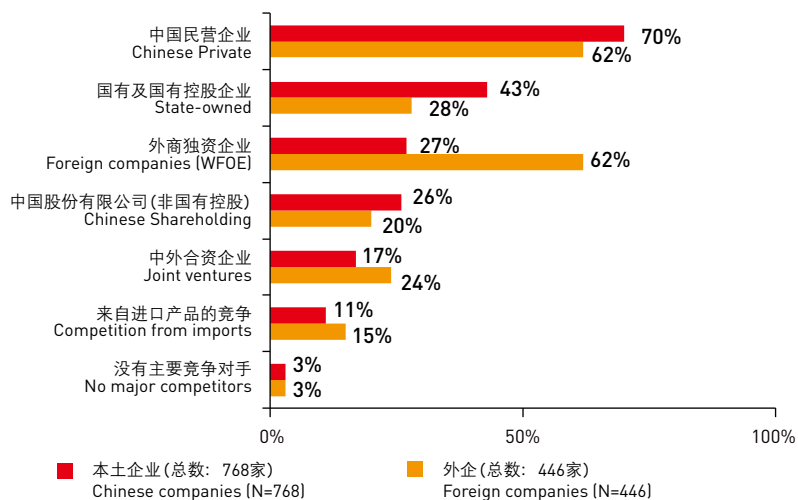
and foreign-owned companies. The 2013 survey was completed by 1,214 executives in November/December 2012, with 768 from Chinese companies and 446 from foreign enterprises. Among them were 539 CEOs, GMs, and company owners, and 388 Vice Presidents, Vice General Managers or Directors, while the rest represented all the remaining business functions: HR, Finance, Marketing, Sales, Operations and Research & Development. Of the respondents, 81% are from the Chinese mainland, 3% from Taiwan, Hong Kong or Macao, and 16% from 28 different countries. The great



图表2：目前贵公司在中国面临的最大的外部挑战为？  
Chart 2: What are the greatest external challenges facing your companies in China?



**图表3：贵公司在华的主要竞争对手是？**  
Chart 3: Who are your main competitors in China?



的6.6 (参见图表1)。虽然对2013年的平均信心指数仍然高于5,但三年来这一指数的下降趋势表明,中国经济放缓对高管们的信心产生了一定的不利影响。

### 挑战与成功因素

从高管们面临的挑战可以推断出中国新商业环境的特点。调查显示,企业在中国经营时所面临的三大外部挑战分别为“人力成本上升”、“激烈竞争”和“中国经济放缓”(参见图表2)。

“人力成本上升”作为中国新商业环境的一个重要特点,连续三年都被高管们视为重大挑战。另外一个重要特点是中国市场上的竞争激烈程度日趋提高,尤其是来自中国民营企业的竞争。当被问及“在中国市场上的主要竞争对手”时,70%的本土企业高管和62%的外企高管的回答是民营企业(参见图表3)。

在中国经济转型期间,企业应该如何应对经营环境的变化?调查结果对此给出了答案。当被问及“企业在中国取得成功的重要因素”时,大多数高管都选择了“高质量的产品和服务”(参见

图表4)。为了能生产出高质量的产品并提供高品质的服务,许多企业计划增加在创新方面的投资。调查结果显示,66%的企业计划增加其未来三年的研发投入(参见图表5)。

### 未来展望

虽然在中国经营的难度有所增加,大多数受访高管仍对未来持有较为乐观积极的态度。当被问及“2013年公司业务与2012年相比会有什么变化”时,62%的本土企业高管以及58%的外企高

管的回答是“比今年好”,更有11%的本土企业高管和8%的外企高管回答“比今年好很多”(参见图表6)。

值得一提的是,52%的外企高管表示,来自中国市场的销售额占其企业全球销售总额的比重有所上升或有显著上升。2012年间52%的外企在中国开展了研发活动,而在2011年间这一比例为39%。这些数据表明,在华外企正在根据中国经济变化的特点,积极进行调整。

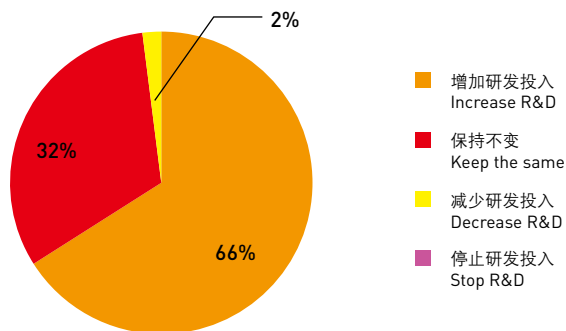
就本土企业而言,对海外市场的投资呈现上升趋势,42%的企业表示会在未来三年内增加海外市场投资。

有意思的是,50%的本土企业高管将“公司治理”视为一项重要的挑战,而只有22%的外企高管选了这一项。这些数据表明,在新的中国商业环境中,本土企业正日益重视公司治理之类的管理问题,并实施诸如海外投资等新战略。

范悦安 (Juan Antonio Fernandez) 教授是中欧国际工商学院管理学教授,许斌教授是学院经济学与金融学教授,周东生教授是学院市场营销学教授。作者们感谢中欧国际工商学院研究基金的支持以及两位研究助理玛利亚·普约罗 (Maria Puyuelo) 和李俊骏的优秀助研工作。

**图表5：未来三年，贵公司在研发方面有何打算？**

Chart 5: What are your R&D plans for the next 3 years? (N=656)



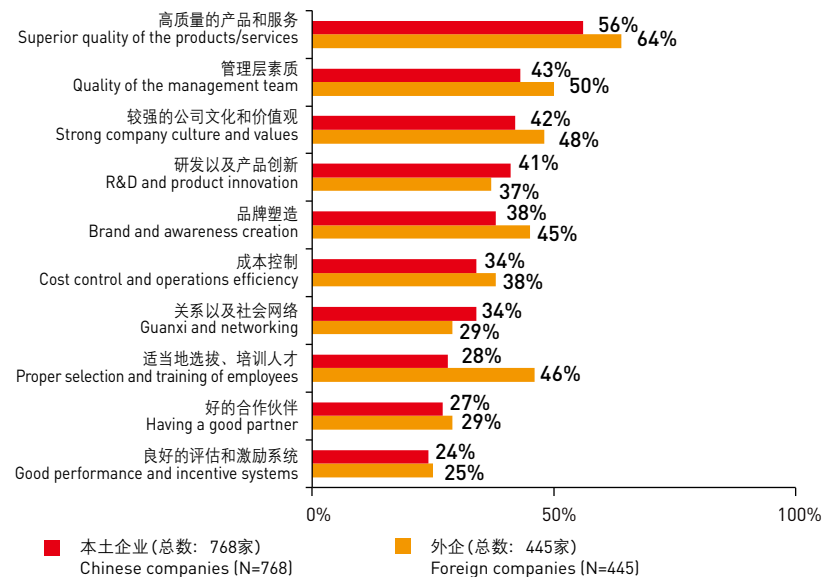
majority of them (92%) have more than 10 years work experience, with 40% of them having more than 20 years work experience. This broad and experienced sample added rich and valuable perspectives to the survey.

The adjustment to China's new business climate is reflected in the confidence index, which is based on the question "How confident are you that your operations in China will be successful in the next year?" On a scale between 0 (no confidence at all) and 10 (maximum confidence), the average rating by Chinese company executives is 6.3 for 2013, dropping from 6.7 for 2011 and 6.6 for 2012. The average rating by foreign company executives is 6.5, dropping from 7.2 for 2011 and 6.6 for 2012 (see chart 1). Although the confidence index remains above 5, the downward trend indicates that the slowdown of businesses in China impacted negatively on executives' business confidence levels.

### Challenges and Success Factors

China's new business climate is evident in the challenges faced by executives. According to the survey, the top three external challenges for companies doing business in China are rising labour costs, increasing competition, and the slowing of the Chinese economy (see chart 2). Rising labour costs have been ranked high in all three recent surveys, which is a key characteristic of China's new business environment. Another key characteristic is intensifying competition in China, especially from Chinese private companies. When asked who their

图表4：贵公司在取得中国成功的重要因素为？  
Chart 4: What are the most important factors for your company's success in China?



main competitors in China are, 70% of Chinese executives and 62% of foreign executives choose Chinese private companies (see chart 3).

With the Chinese economy in transition, how do companies respond to the change? The survey results give the answer. When asked what are the most important factors for their companies to be successful in China, the top answer is quality of products and services (see chart 4). In order to achieve higher quality of products and services, many companies plan to increase their investment in innovative activities. The survey results indicate that 66% of the companies who did R&D in 2012 plan to increase their R&D investment in the next 3 years (see chart 5).

### Looking Ahead

Facing more difficulties in doing

business in China, a majority of the executives surveyed are optimistic about the future. When asked how they expect their company's business to perform next year (2013) compared to this year (2012), 62% of the Chinese company executives and 58% of the foreign company executives choose "better than this year", and another 11% of the Chinese company executives and 8% of the foreign company executives choose "much better than this year" (see chart 6).

It is worth mentioning that 52% of surveyed foreign companies cite an increase or a substantial increase of the share of their China sales in global sales, and 52% of foreign companies reported R&D activities in China in 2012, up from 39% in 2011. These statistics indicate that foreign companies have been actively adjusting to the changing

