



CEIBS

CHINA EUROPE INTERNATIONAL BUSINESS SCHOOL

中欧国际工商学院

中欧国际工商学院

China Europe International Business School

2011 中国企业调查

2011 Chinese Executives Survey

综述 - *Executive Summary*



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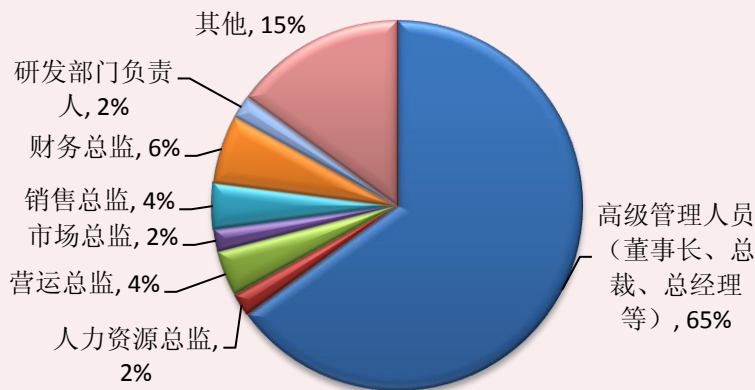
导言

中欧国际工商学院教授团队在 2010 年启动了一项关于中国企业经营环境的研究——中国企业调查，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和在读 EMBA 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、前景与挑战等广泛主题。

今年是中国企业调查开展的第一年。2010 年 10 月底，中欧教授研究团队通过校友会 and EMBA 办公室向校友和 EMBA 在读学员发放了网络匿名调查问卷。在 10 月 29 日至 11 月 30 日的问卷调查期间，共收到有效问卷 698 份，其中 65% 的受访者为公司高层管理人员，其余为职能部门负责人。为回馈广大校友的支持，我们将调查结果的初步分析结果汇集在本报告中，并在第一时间反馈给广大校友。更为详细和深入的分析报告将在 2011 年初出版。

受访者的职务



中欧国际工商学院教授团队的成员包括范悦安教授、许斌教授、周东生教授以及研究员刘瑛博士和陈丽佳。我们在调查过程中得到了多方面的支持和帮助，在此我们深表感谢！首先，感谢中欧国际工商学院院方的大力支持，感谢校友办公室和 EMBA 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进行。

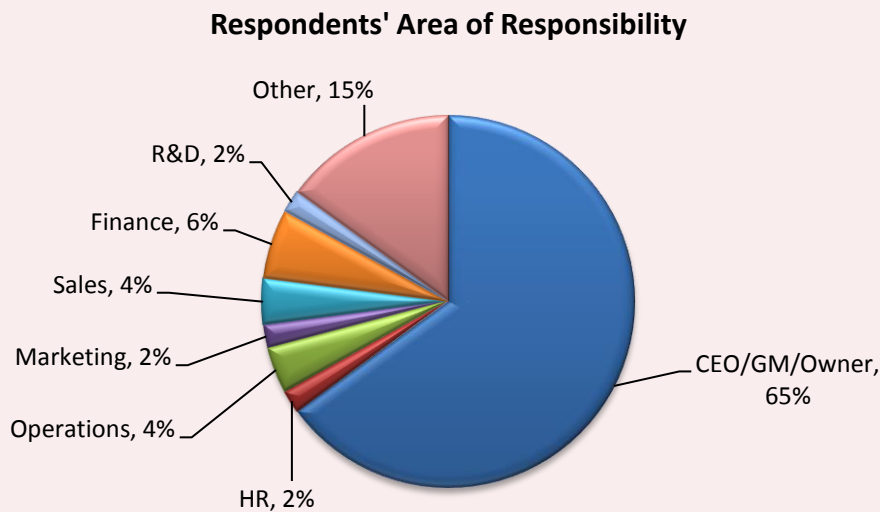
中欧国际工商学院教授团队, 2010 年 12 月

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) in 2010. 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.

This is the first year that Chinese Executives Survey is being conducted. At the end of October 2010, 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 29 October to 30 November 2010. In total, 698 respondents completed the survey. Of those that participated, 65 percent identified themselves as a senior-level manager, 35 percent identified themselves as a department director or functional leader. To show our appreciation for the support we received from alumni and students, we made this executive summary available as soon as it was completed. A more detailed report is expected to be completed by spring of 2011.



Finally, 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 Faculty Team,

December, 2010

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。



许斌教授

许斌博士是中欧国际工商学院经济学和金融学教授，经济学和决策科学系主任。许博士在美国哥伦比亚大学获经济学博士学位。

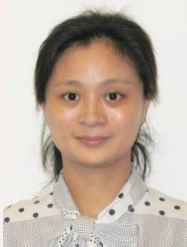
许斌博士目前的研究着重于全球经济和中国经济，跨国企业在中国的战略，以及新兴市场的贸易和金融问题，其研究成果发表于国际国内知名刊物，并著有《国际贸易》一书。许斌博士是 2009 年度和 2010 年度中欧国际工商学院优秀教师奖获奖者。



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，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。



刘瑛研究员

刘瑛博士是中欧国际工商学院研究员，她在南京大学获得经济学博士学位。刘瑛博士的研究领域是人民币汇率和中国经济，研究成果发表于《复旦大学学报（社会科学版）》、《亚太经济》等学术期刊上。



陈丽佳研究员

陈丽佳是中欧国际工商学院助理研究员，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和中国式的管理方式，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。

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 India, Japan, Korea, UK, France, Italy and Spain.



Prof. Bin Xu

Dr. Bin Xu is Professor of Economics and Finance, Chair of the Department of Economics and Decision Sciences at CEIBS. He received his Ph. D. from Columbia University.

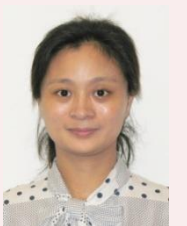
Dr. Xu's current research focuses on the global and Chinese economy, multinational enterprises in China, and trade and finance issues of emerging markets. He has published extensively in both international and Chinese journals, and has authored the book: International Trade. Dr. Xu is the recipient of the 2009 and 2010 CEIBS Teaching Excellence Award.



Prof. Dongsheng Zhou

Dr. Dongsheng Zhou is Professor of Marketing 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).



Ying Liu

Dr. Liu is Research Associate at CEIBS. She got her Ph.D. from Nanjing University. Dr. Liu's research focuses on the RMB exchange rate and the Chinese Economy.

Her research has been published in the Fudan University Journal, the Economy of Asia Pacific, and others.



Lijia Chen

Lijia Chen is Research Assistant at CEIBS. She got her Master of Management from Tongji University.

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

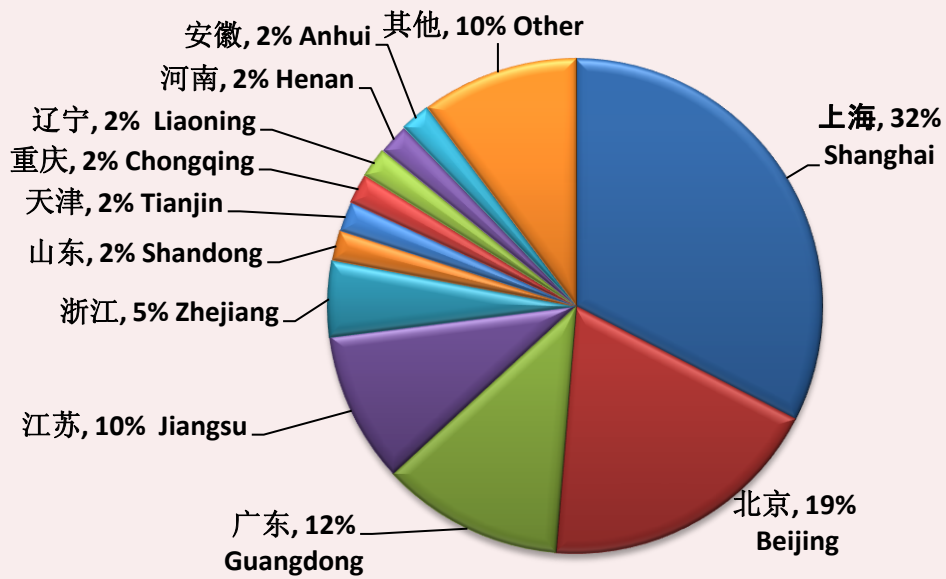
第一部分

Part I

公司背景

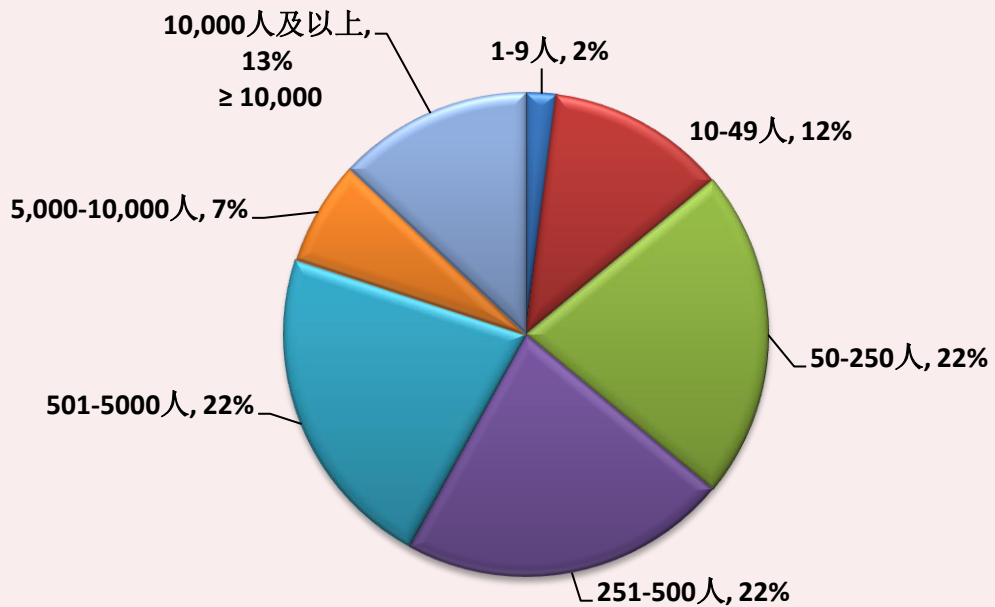
COMPANIES INCLUDED

贵公司设在哪个省（市）？ N=696
Where is your company's headquarters located?

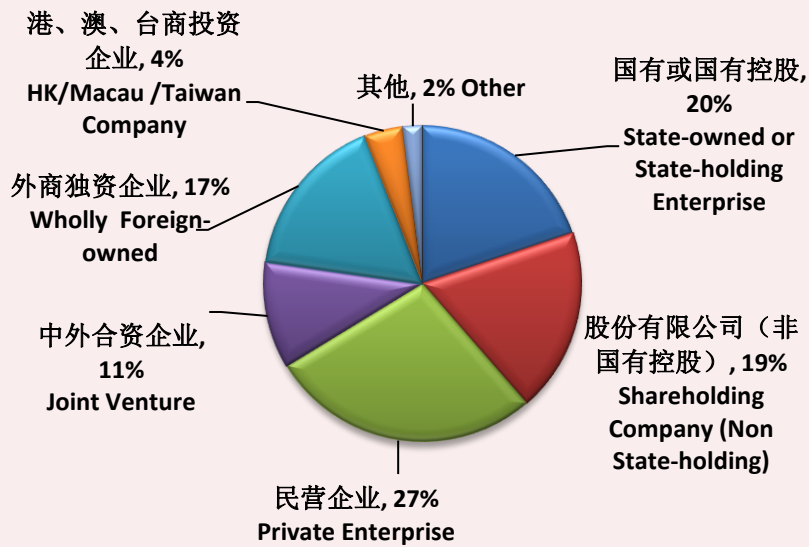


“其他”包括福建，甘肃，广西，贵州等。
The “other” category includes: Fujian, Gansu, Guangxi, Guizhou, etc.

贵公司目前有多少员工？ N=692
How many workers does your company employ?

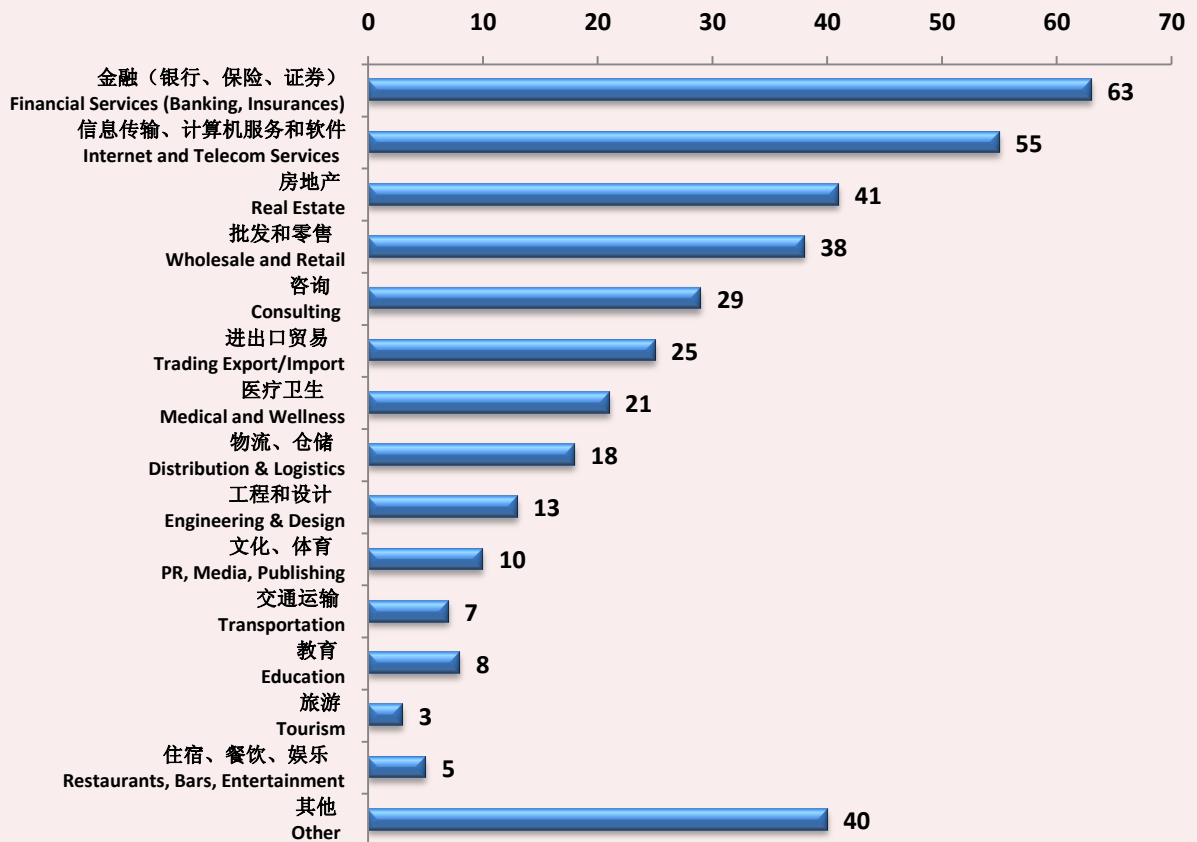


贵公司目前的登记注册类型是什么？ N=695
What is your company's current legal status?



“其他”包括：有限责任公司，有限合伙企业，合伙制企业，民办非企业。
The “other” category includes: Limited partnership, partnership, and non-for-profit organization, etc.

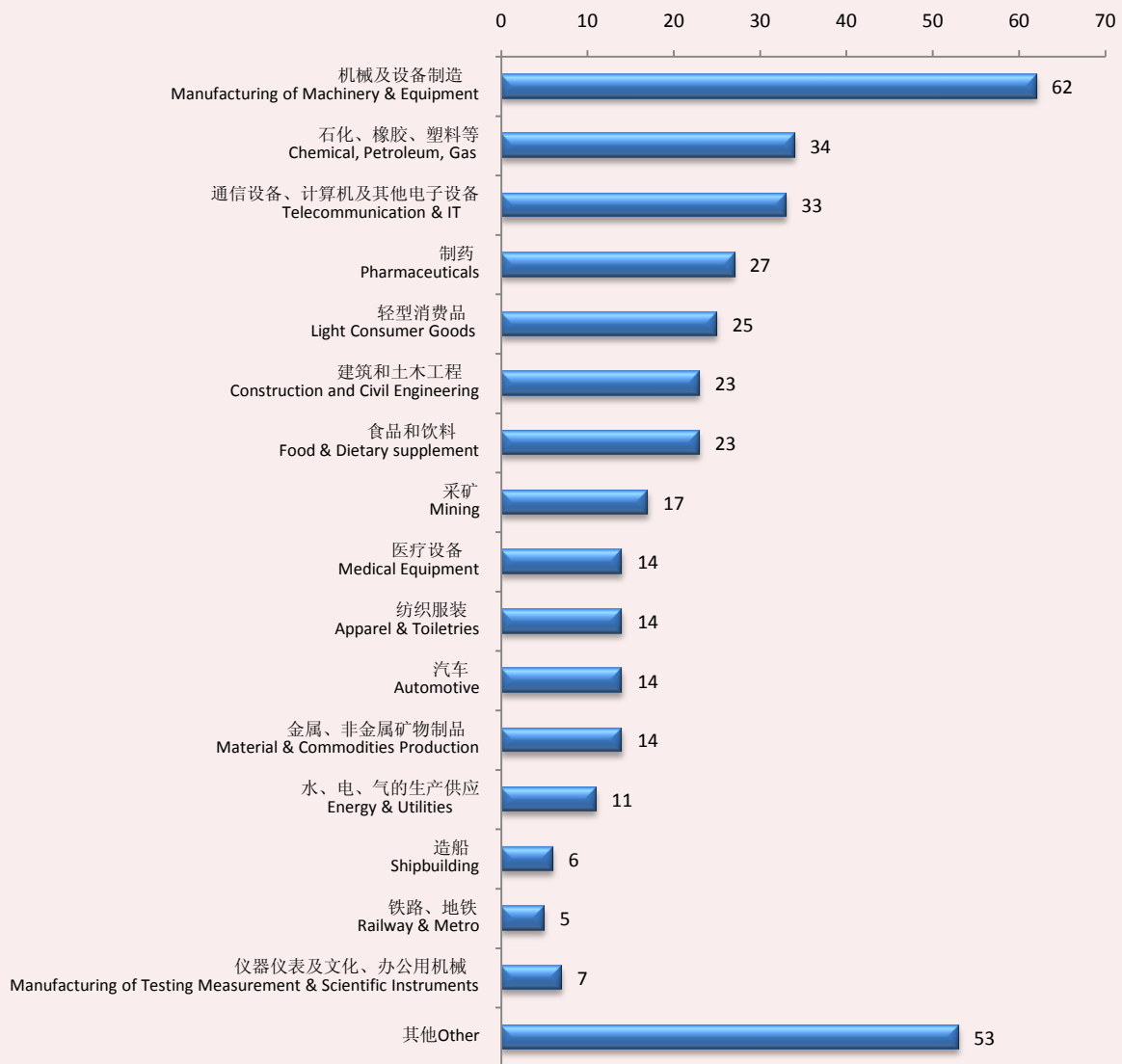
贵公司提供的服务主要是什么类型？ N=316
What type of service does your company provide?



“其他”包括：运营外包，广告，婚纱摄影机相关服务，设备检修保养，中介代理（进出口服务），B2B 电子商务，B2C，邮政等。
The “other” category includes: Outsourcing, advertising, service related to wedding dress and photos, maintenance, export/import, postal service, etc.

贵公司所在的制造业主要从事什么活动？ N=376

What is your manufacturing activity?



“其他”包括：奢侈品，国防，文教体育用品，航空，废弃资源和废旧材料回收加工等。

The “other” category includes: Luxury goods, defense, entertainment & educational products, aeronautics, waste management, recycling & clean technologies, etc.

第二部分

Part II

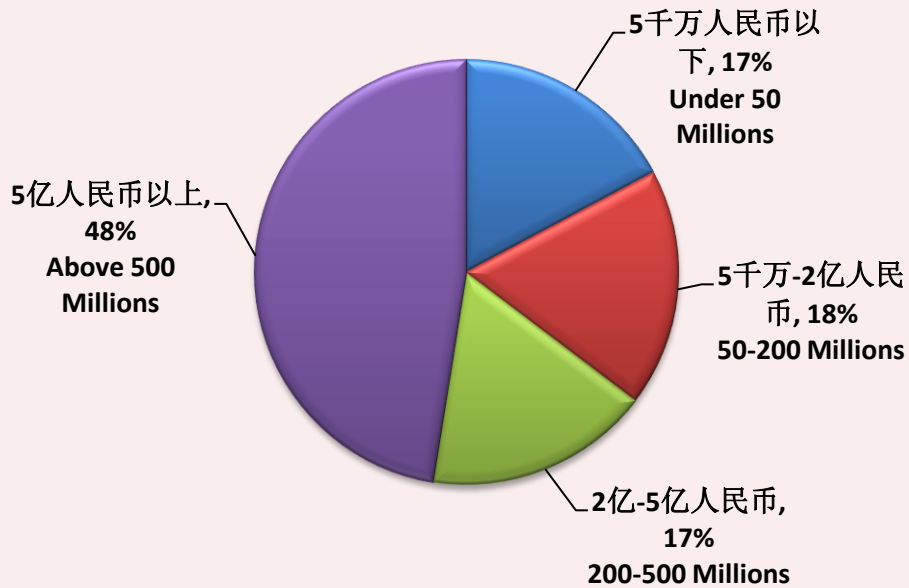
前景与挑战

OUTLOOK AND CHALLENGES

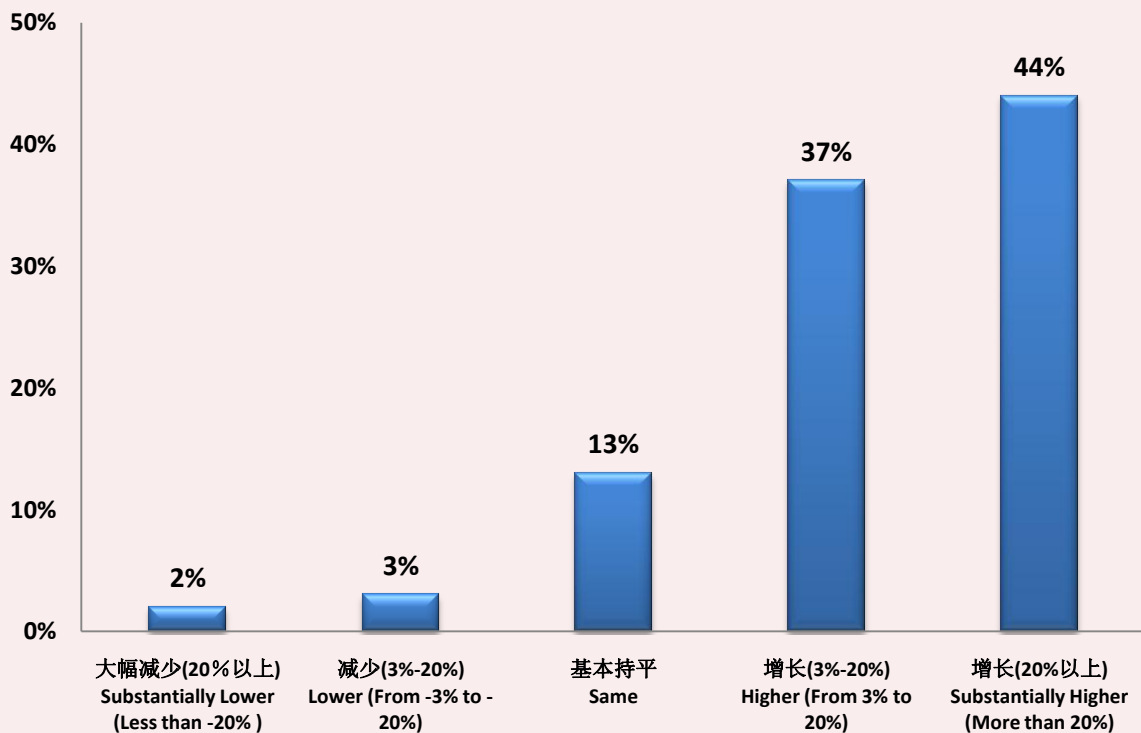
2010 经营业绩

Business Performance in 2010

贵公司 2010 年的销售收入预计将达到多少？ N=694
 What are your company's expected sales in 2010 (RMB)?

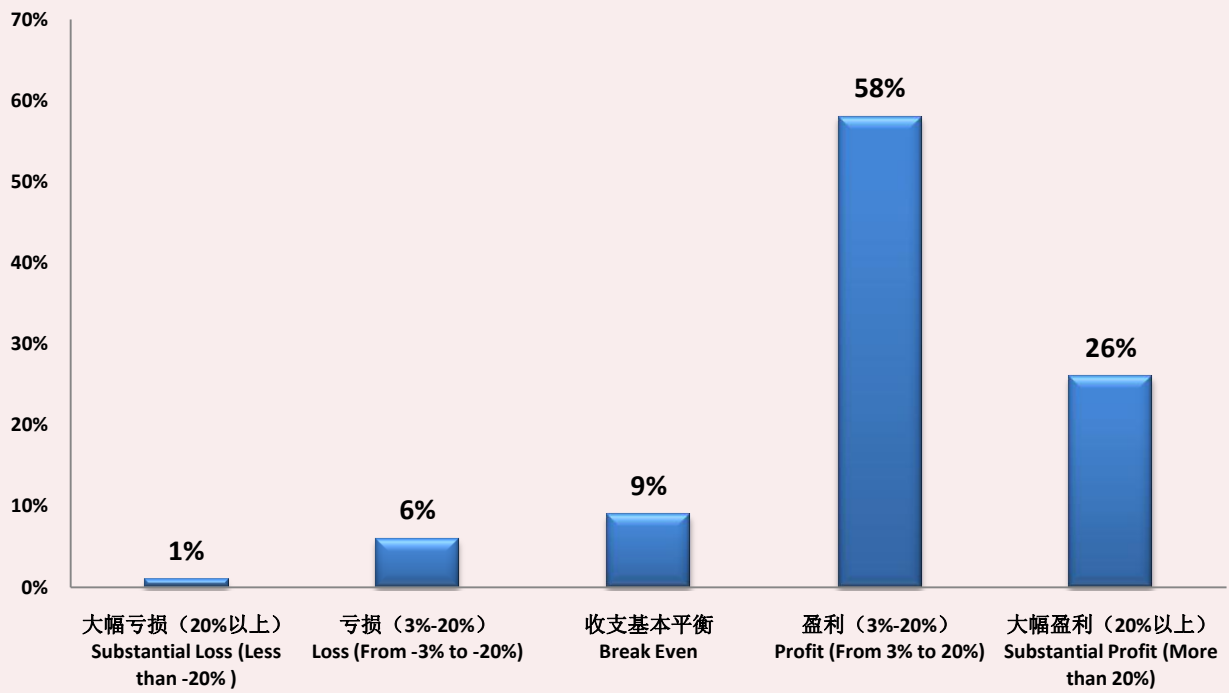


贵公司 2010 年的预计销售收入与 2009 年相比情况如何？ N=697
 What are your company's expected sales in 2010 compared to 2009?



贵公司在 2010 年的预期盈利情况怎么样？ N=696

How is your company's expected profitability in 2010 compared to 2009?

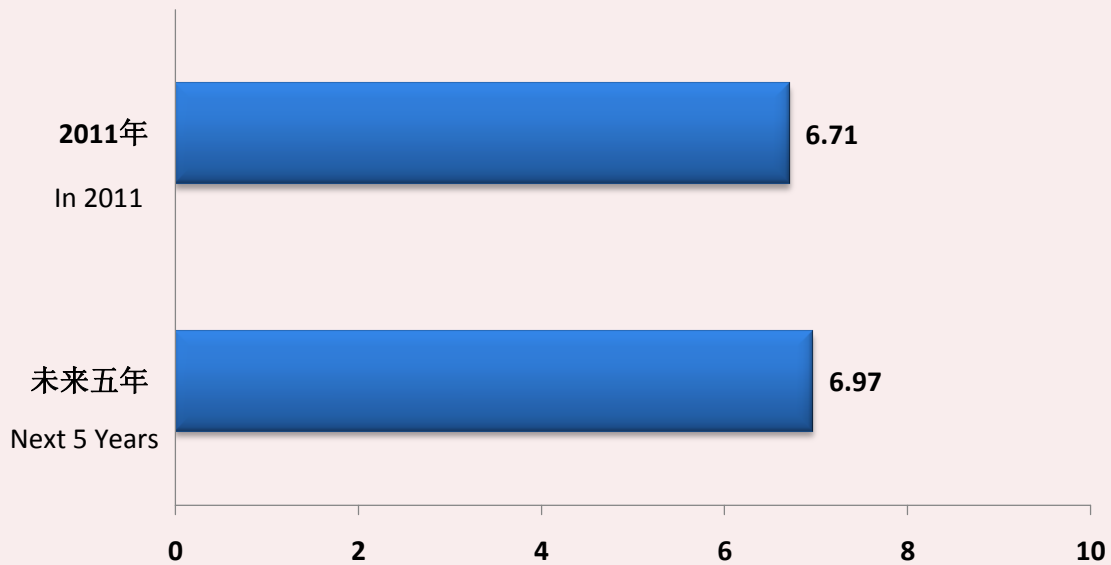


前景与挑战

Outlook and Challenges

您如何预期贵公司在未来 5 年的发展？ N=650

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

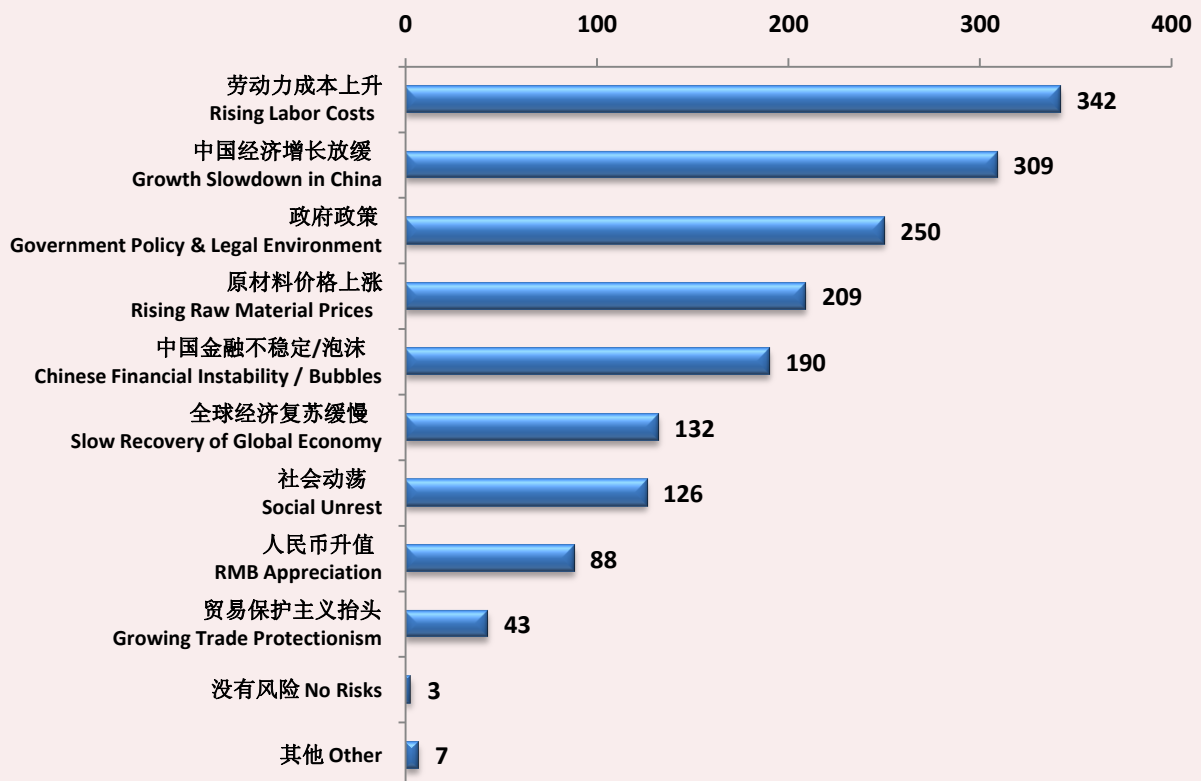


在目前的经营过程中，贵公司面临的困难和挑战主要集中在哪些方面？
What is presently causing you the most difficulty in running your company?

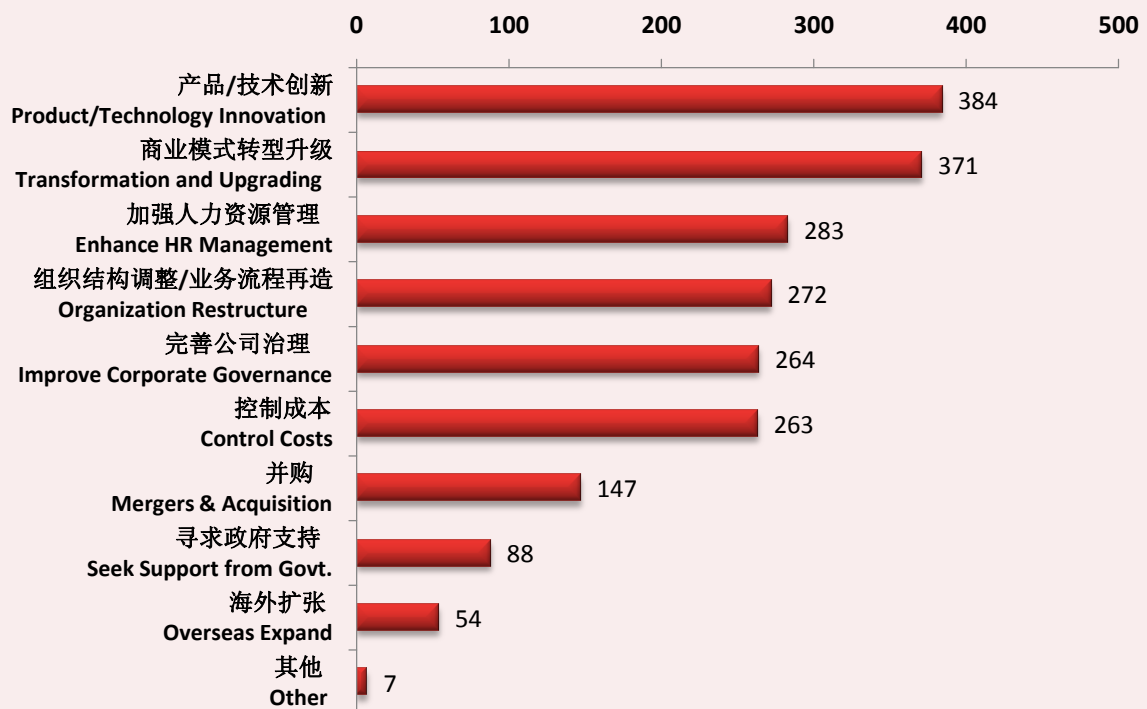


“其他”包括：资源获取，科研水平，经营革新，政府采购间接费用太高等。
The “other” category includes: Getting raw materials, R&D, change in operations, cost of government services, etc.

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 risks facing your company in the coming years?



在您看来，贵公司应该采取哪些措施应对上述挑战？ N=696
How do you respond to the above challenges?



“其他”包括：控制投资风险，转向内需，加强内控，机制创新，设立人民币基金。
The “other” category includes: Control investment risk, turning to domestic demand, strengthen internal control, innovation, setup of RMB fund, etc.

第三部分

Part III

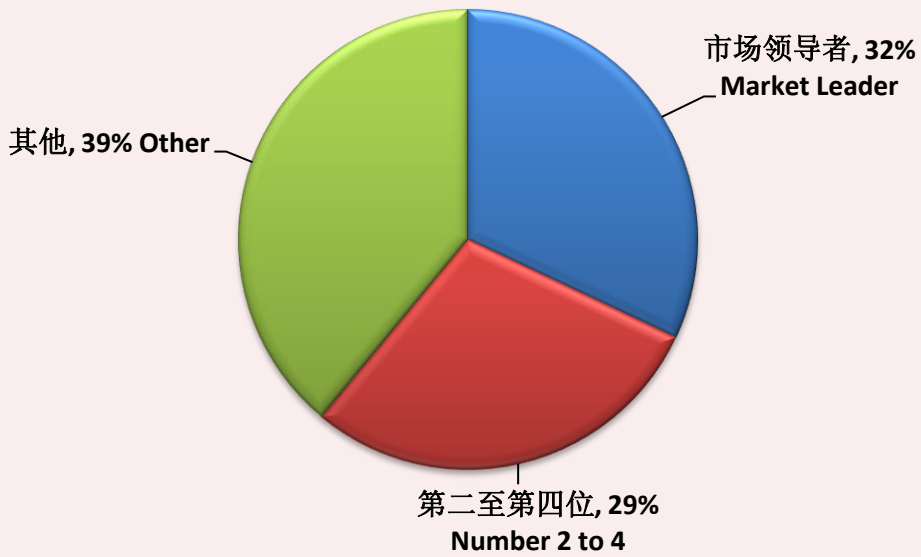
经营环境

BUSINESS ENVIRONMENT

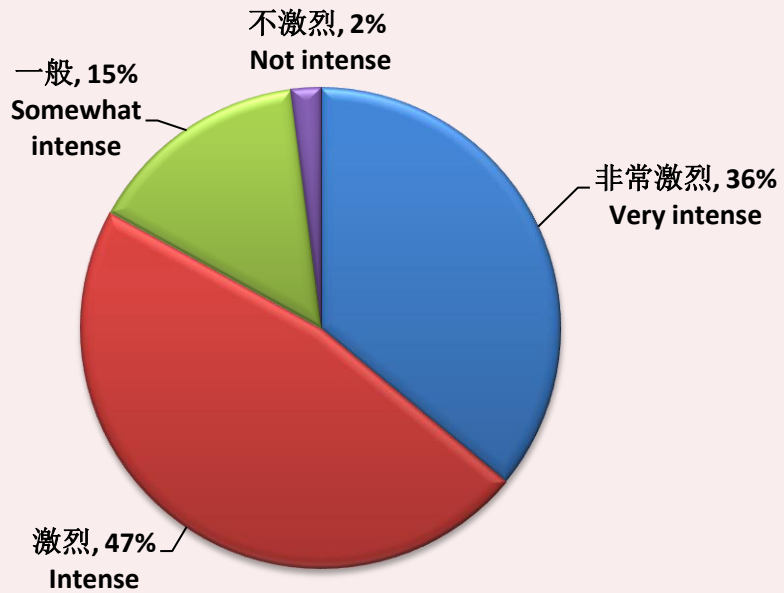
市场竞争

Competition

在中国市场中，贵公司处于什么样的市场地位？ N=495
What is your market position in China?

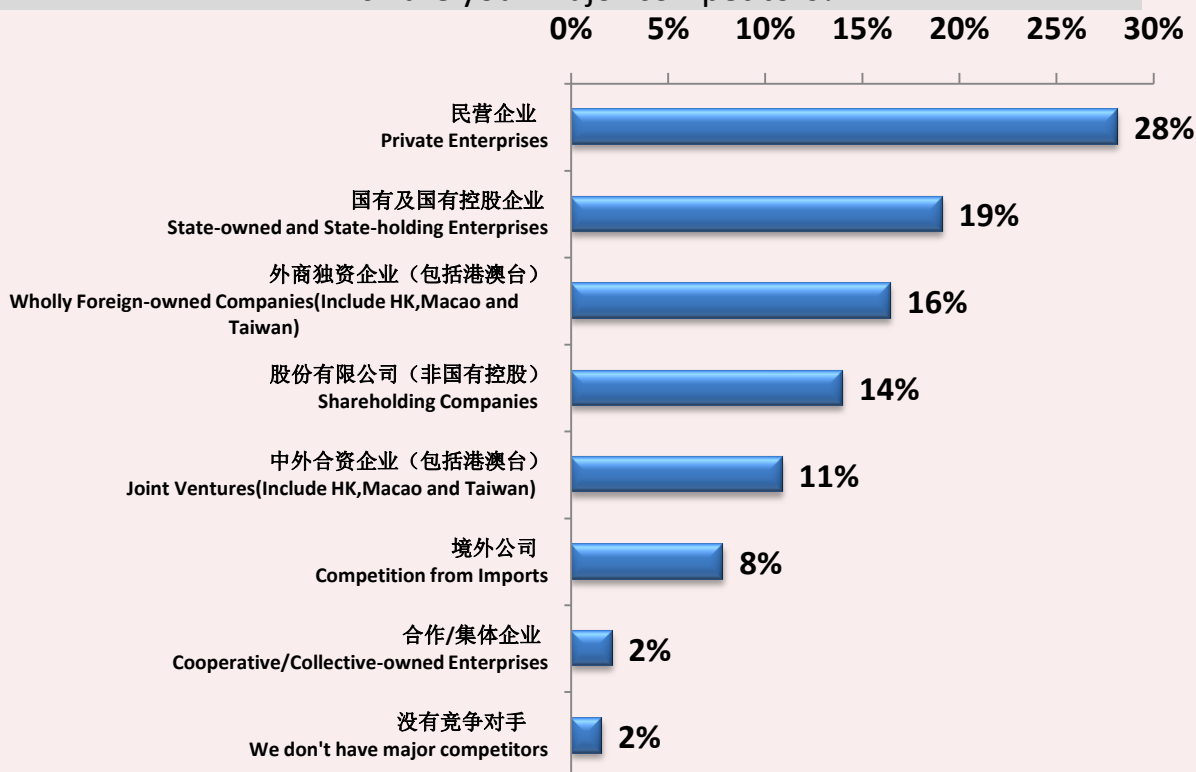


贵公司所在市场的竞争程度如何？ N=694
What is the degree of market competition facing your company?



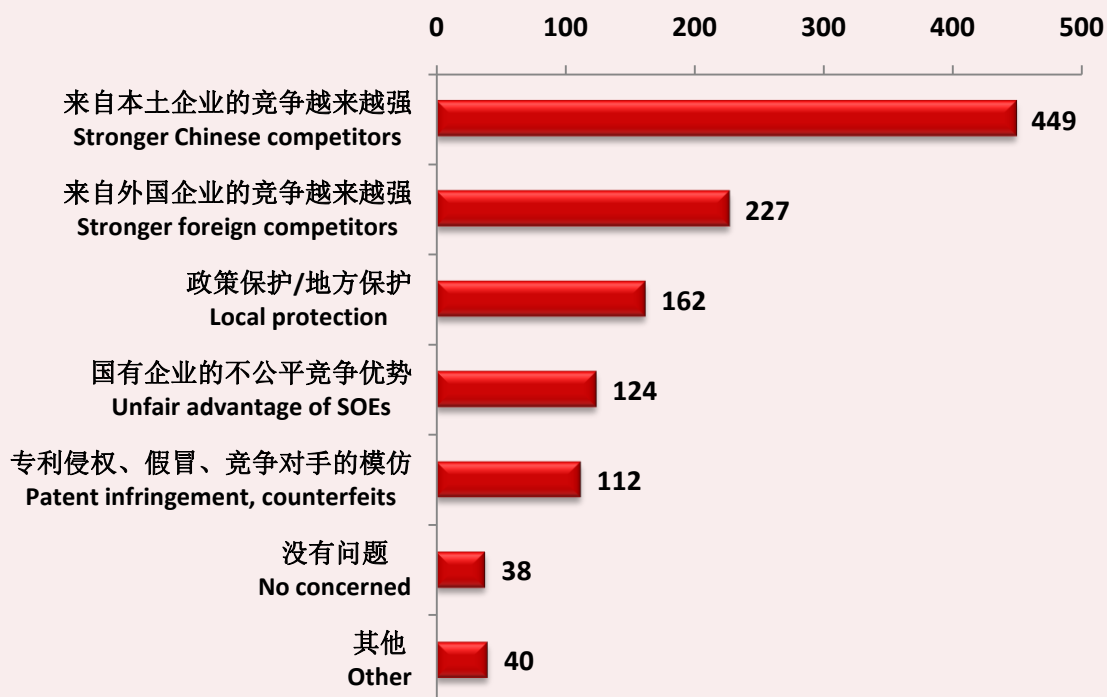
贵公司的主要竞争对手属于下列哪一类型？

Which are your major competitors?



在市场竞争方面，贵公司面临的主要问题是什么？ N=693

Which are your main concerns regarding competition?



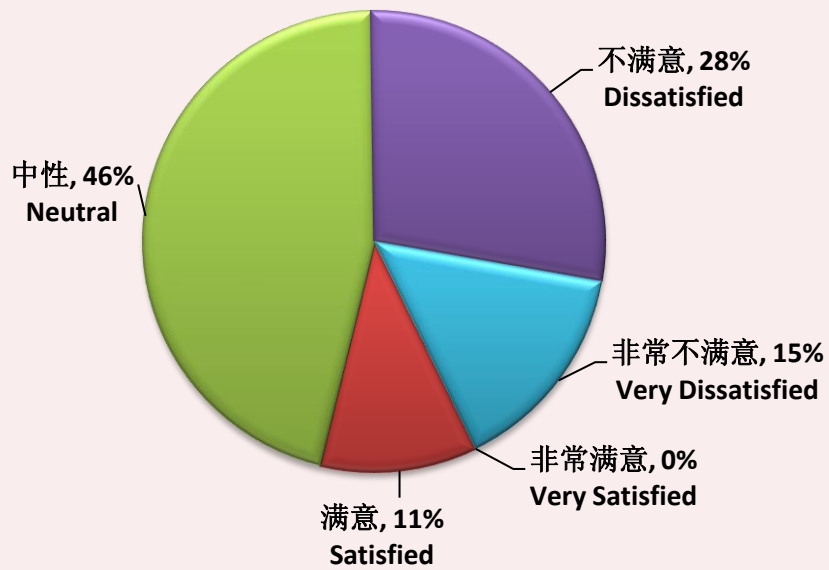
“其他”包括：国内各种资质成为了市场不公平竞争的一种借口，资金门槛越来越高，人际关系网，来自与部分地方官员有密切联系的当地企业，在国外的不公平待遇，自己产品的定位等。

The “other” category includes: All kinds of licenses which become barriers for fair competition, high entry level of capital, guanxi, enterprises who have good relationships with local government, unfair treatment overseas, etc.

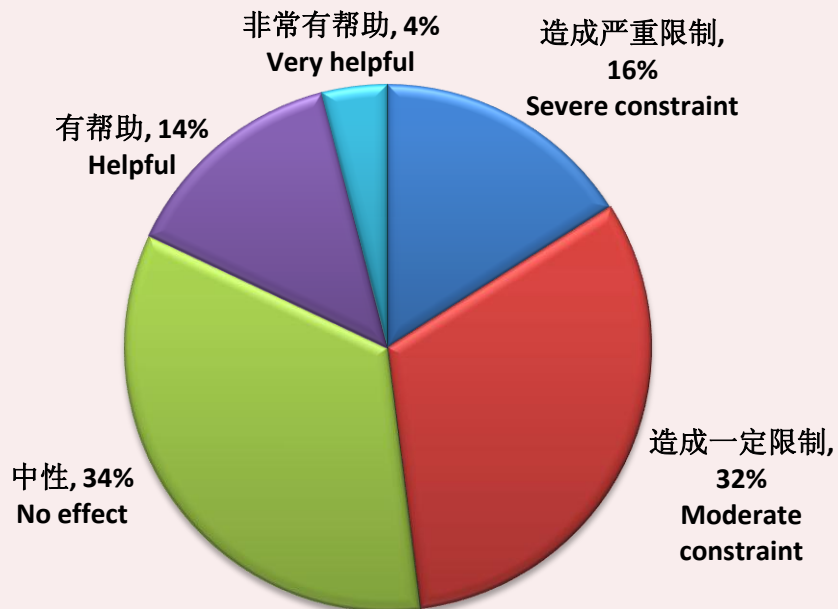
政府政策

Government Policy

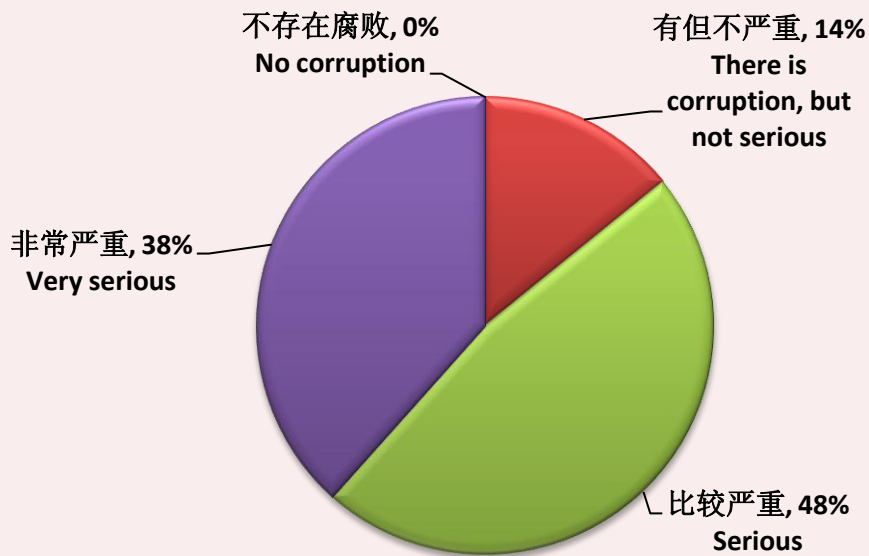
您对政府办事效率是否满意？ N=696
Are you satisfied with the services the government provides?



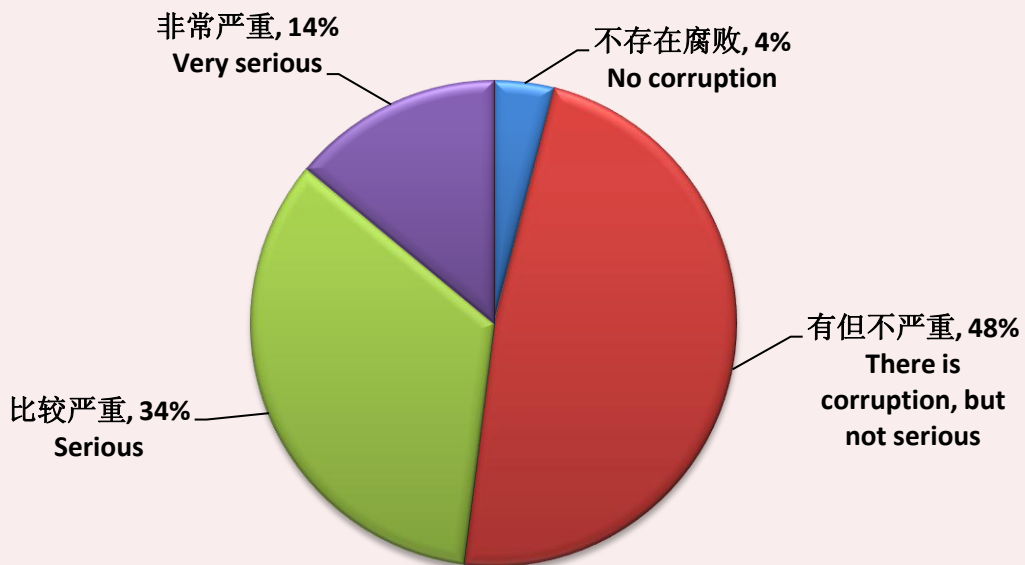
政府政策和管制对贵公司的经营起到了什么作用？ N=695
What is the effect of the government policies and regulations on your industry?



您认为，总体而言，腐败在中国严重吗？ N=694
In your view, how serious is corruption in China, in general?

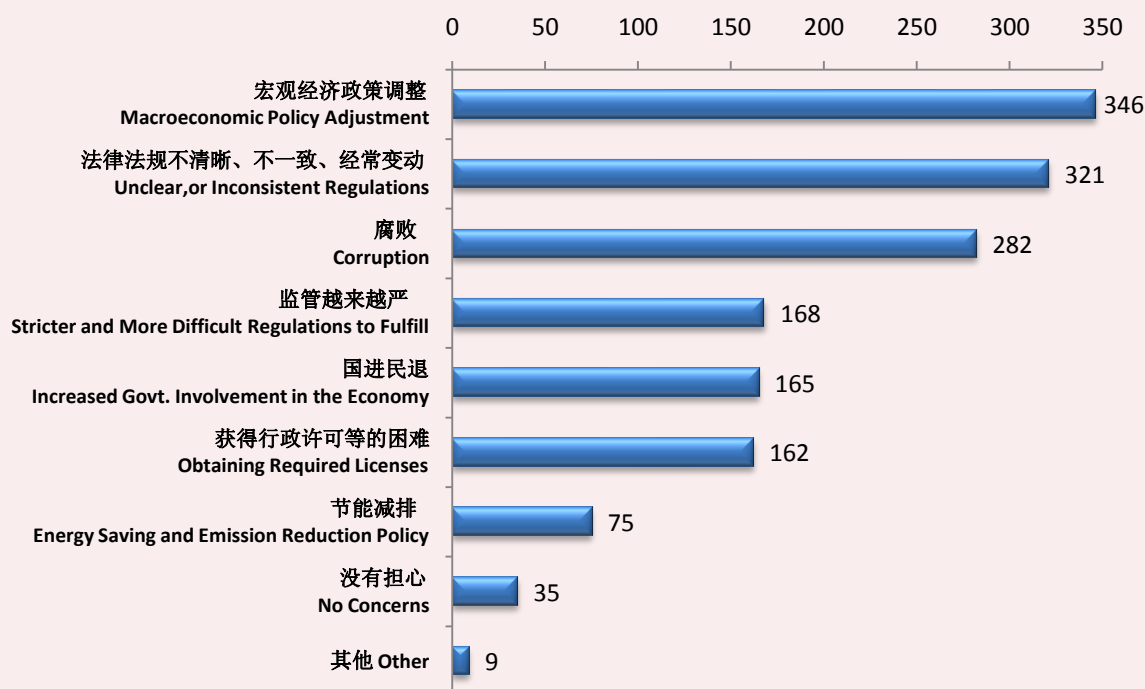


贵公司所在行业存在腐败问题吗？ N=691
In your view, how serious is corruption in your industry?



在政策和法律方面，贵公司存在哪些担心？

What are your main concerns regarding government and the legal environment?



“其他”包括：医疗体制改革政策，劳动法等相关，政策执行的地域差异，政治体制跟不上经济的变化等。

The “other” category includes: health system reform, labor law, regional disparity of policy implementation, political system not keeping up with the changes in the economy, etc.

第四部分

Part IV

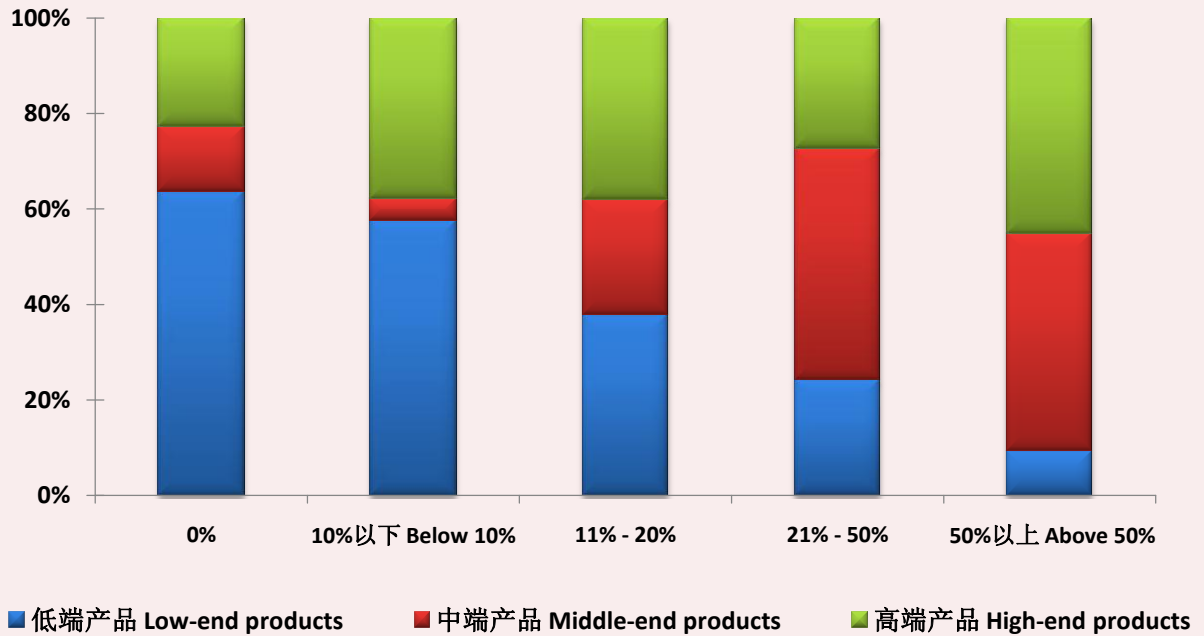
经营活动

FUNCTIONAL PERSPECTIVES

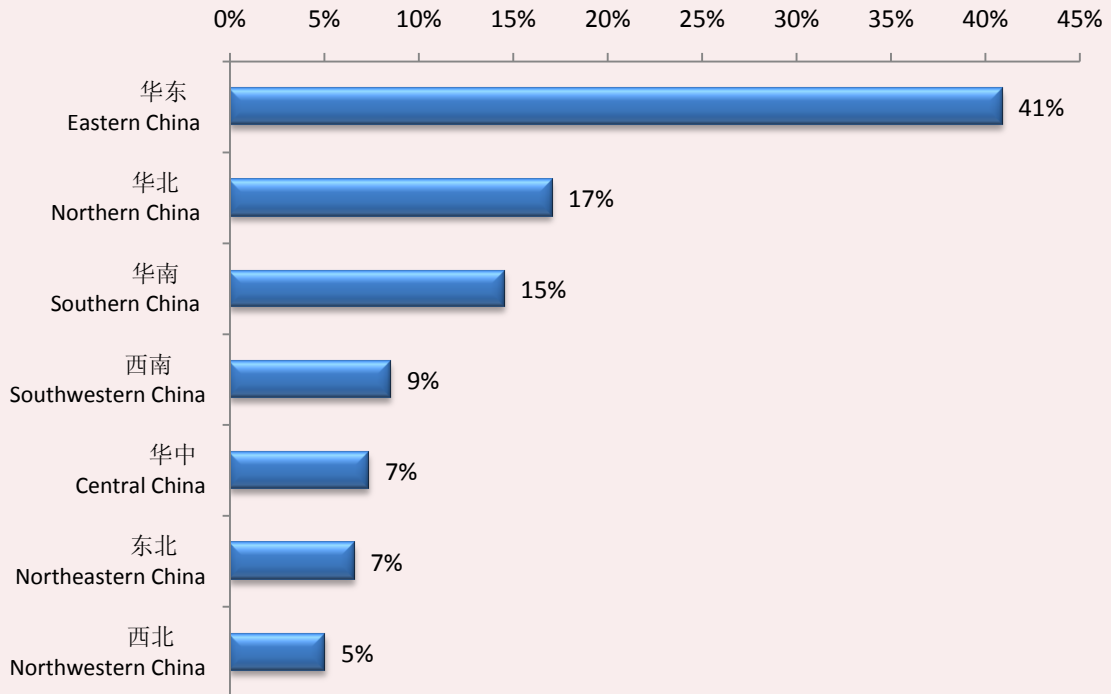
生产与供应

Production and Supply

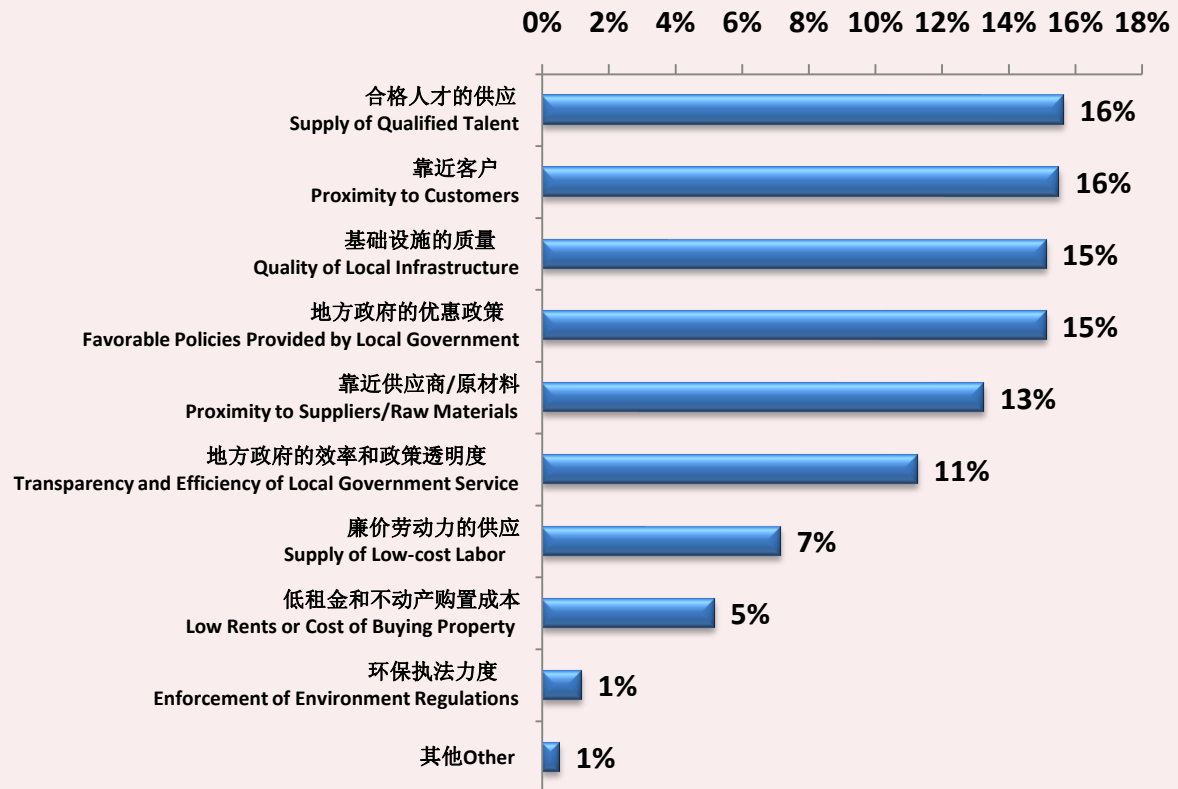
贵公司产品中，低端、中端和高端产品的分布情况如何？
Approximately, what percentage of your products belongs to...?



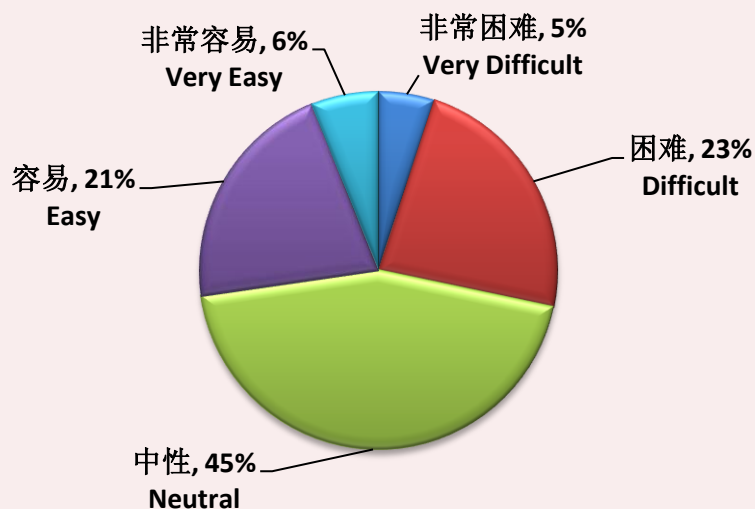
国内工厂位于哪个区域？
Where are your plants located in China?



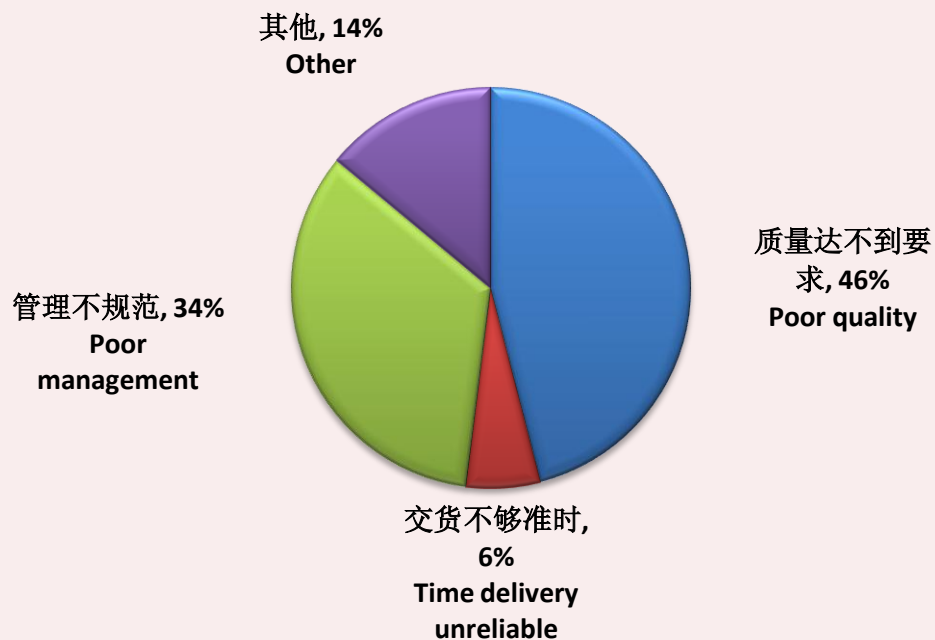
就贵公司而言，工厂选址时的主要考虑因素有哪些？
Which of the following factors are important in deciding the locations of your plants?



对贵公司来说，在国内寻找合格的供应商困难吗？ N=466
How difficult it is to find qualified suppliers in China?



寻找合格的供应商困难的主要原因?
Why is it difficult to find a qualified supplier?

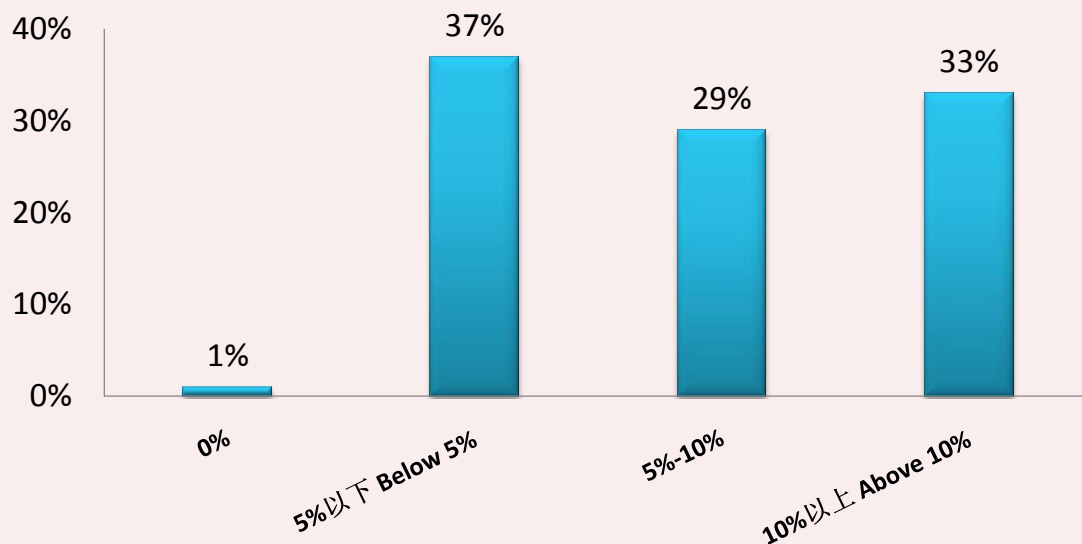


“其他”包括：技术障碍，研发配套不行，基础设施不够要求等。
The “other” category includes: Limited technology, poor R&D, poor infrastructure, etc.

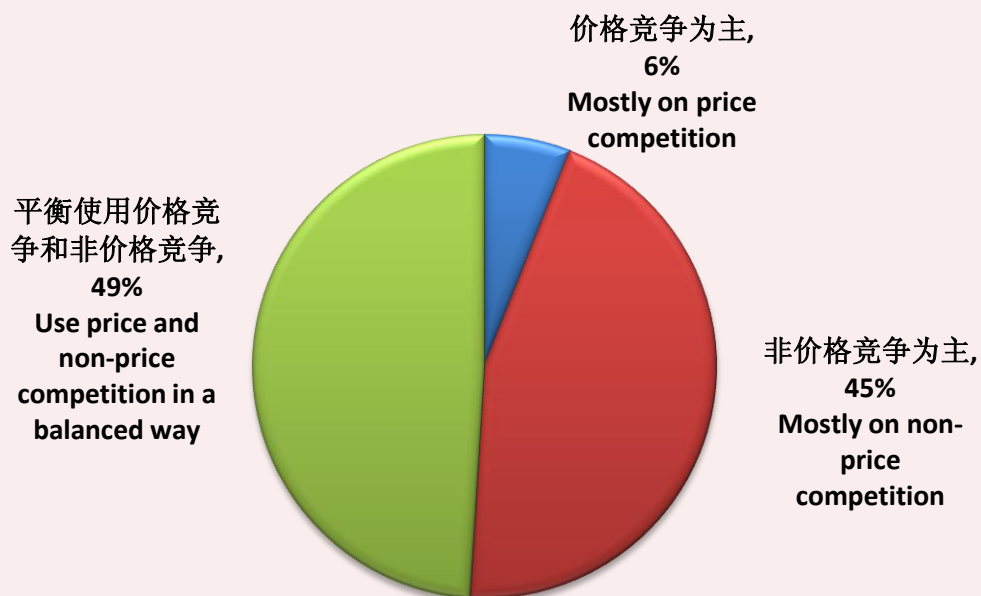
销售管理

Marketing and Sales

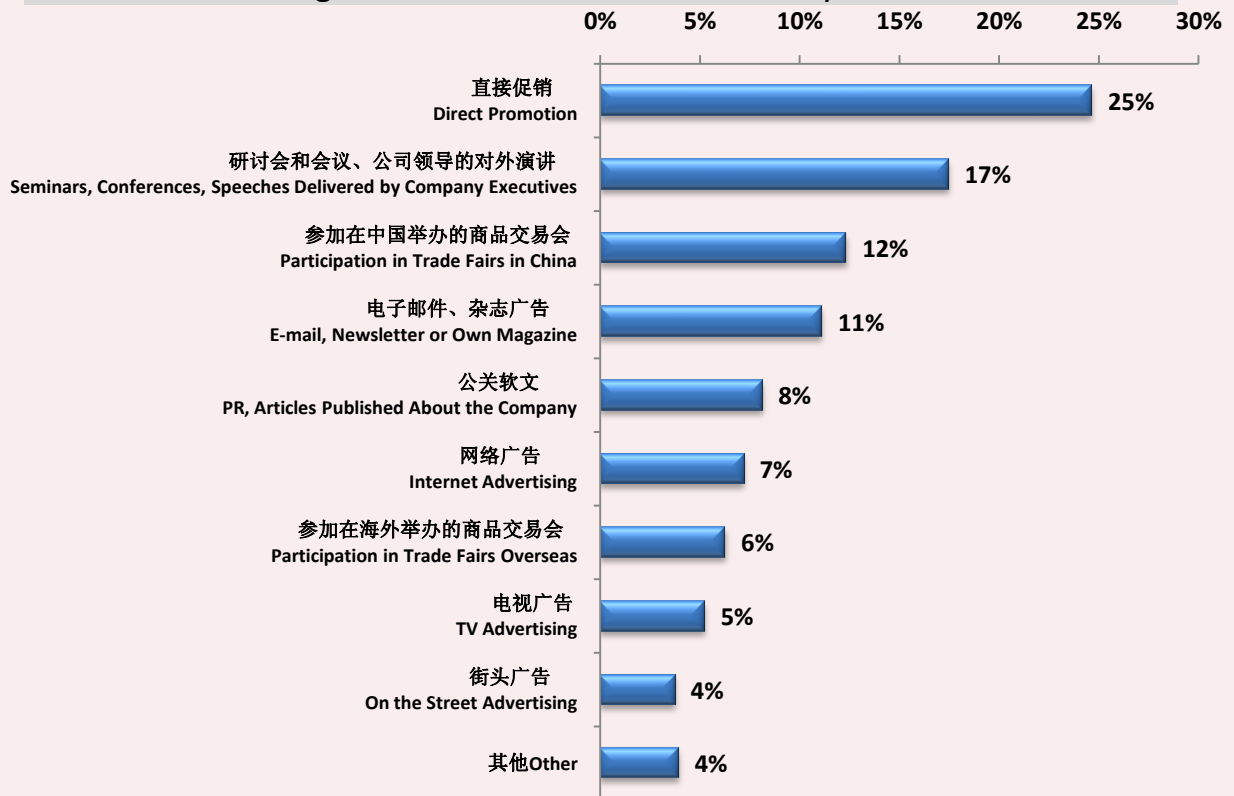
贵公司每年的销售费用约占销售收入的百分之多少？ N=497
What percentage of yearly revenues do you spend on marketing and sales?



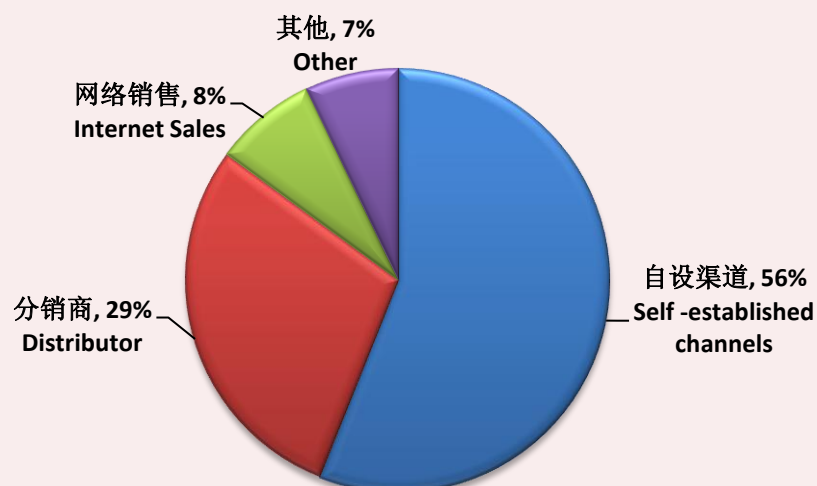
贵公司采用的营销策略主要是什么？ N=492
Which marketing strategy do you use?



就贵公司而言，下列哪些营销手段效果最好？
Which marketing activities are most effective for your main business?



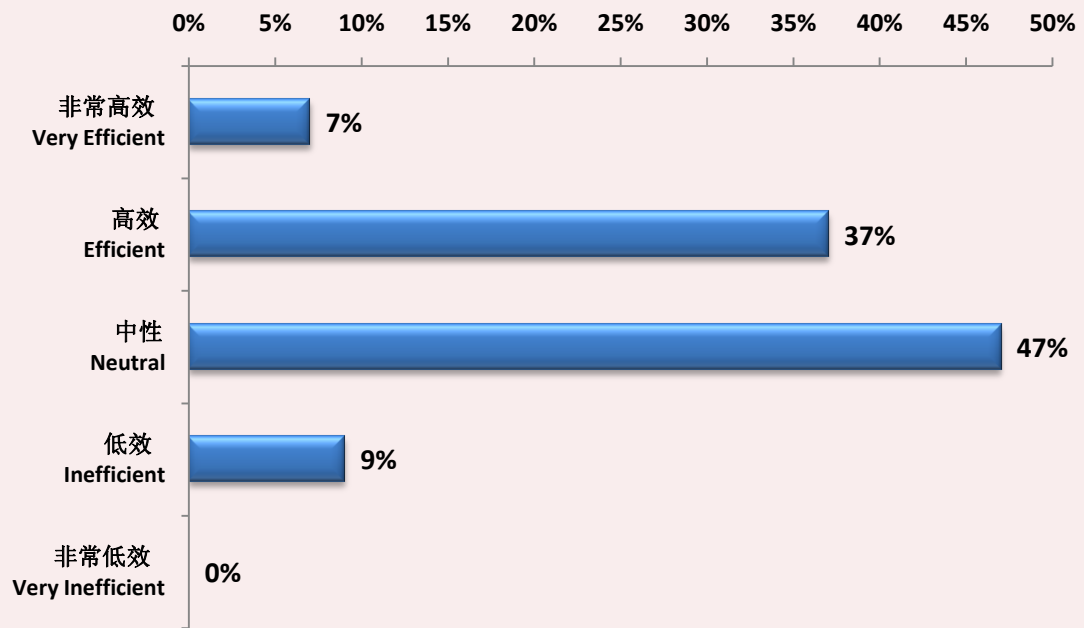
贵公司的主要销售渠道是什么？
Which is your main sales channel?



“其他”包括：客户相互推介，直销等。
The “other” category includes: Introduction from old customers, direct selling, etc.

您如何评价您的销售网络？ N=495

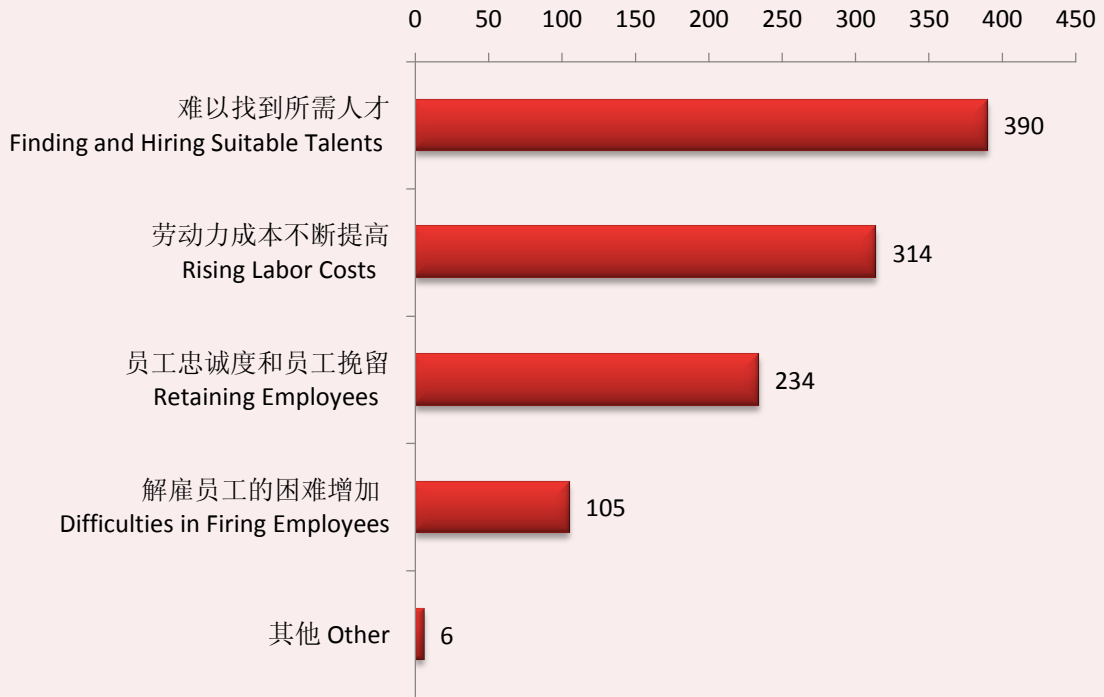
What do you think of your national distribution network?



人才与工资

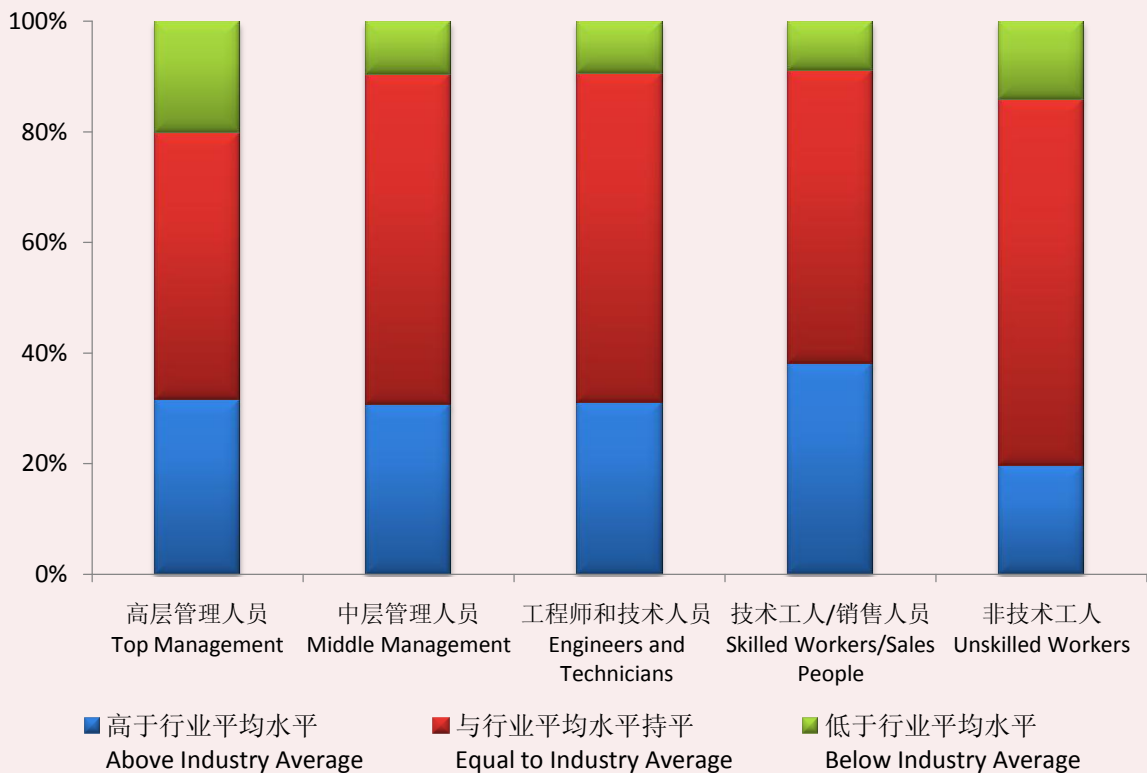
Human Resources

在人力资源方面，贵公司面临的主要问题是什么？
Which are the major human resources issues facing your company?



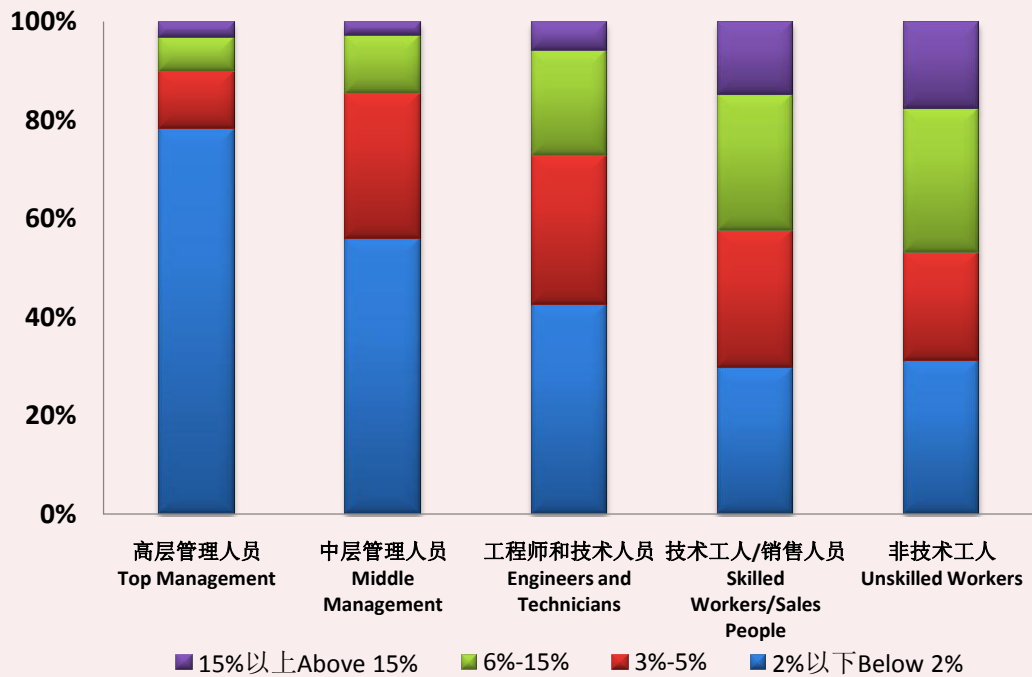
“其他”包括：工作不用心，且效率低，培训 员工不流动等。
The “other” category includes: Employees’ low efficiency, employees’ low mobility, etc.

在 2010 年，贵公司的工资水平与行业平均水平相比是高还是低？
How would you describe the level of salary you paid to employees in 2010?

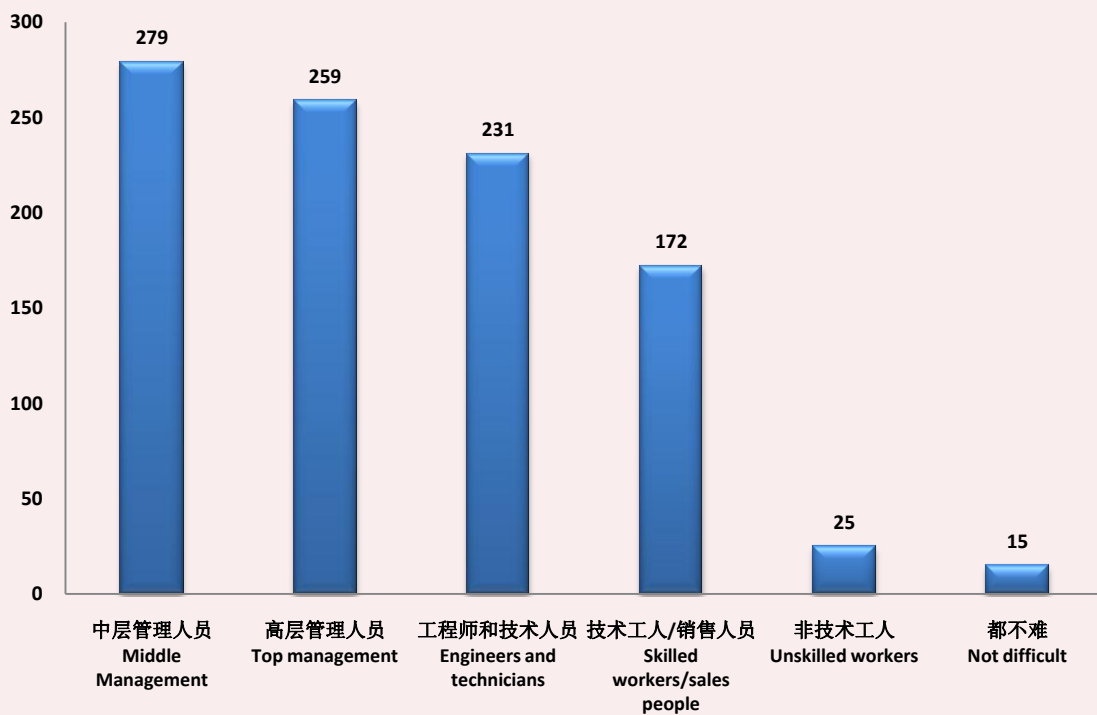


注：受访企业预期在 2011 年的平均加薪幅度为 10%。
Note: Our respondents expected to receive an average salary increase of 10% in 2011.

贵公司 2010 年的平均员工流失率大约是多少？
What is your company's average employee turnover in 2010?

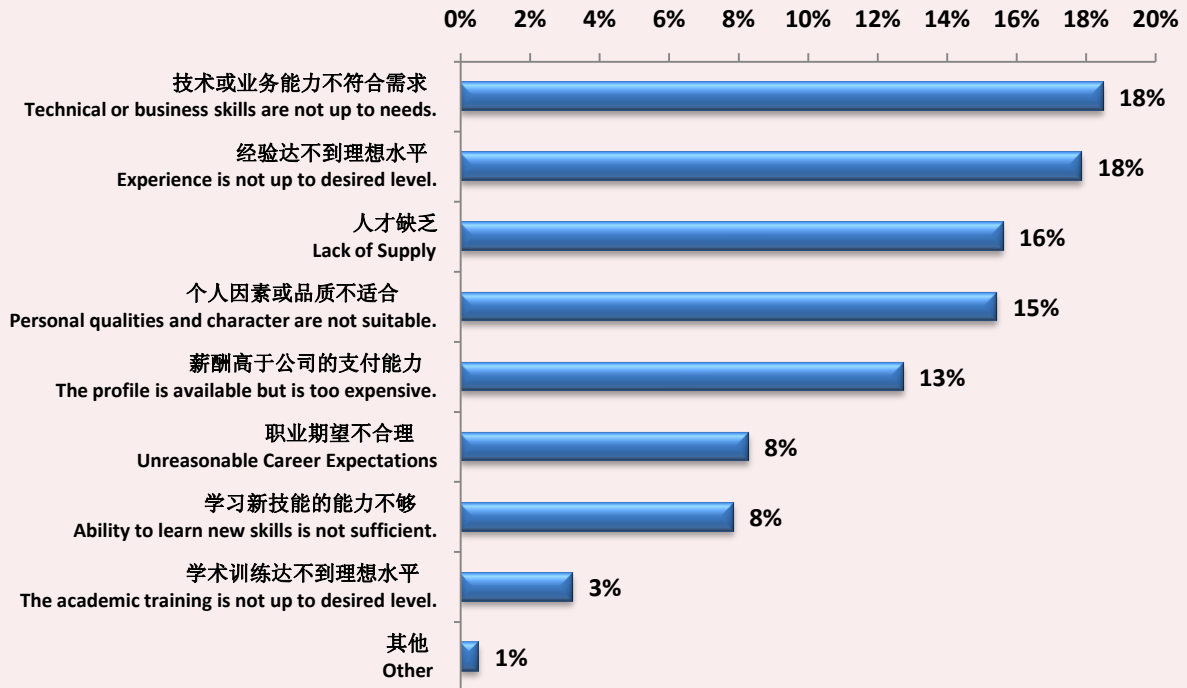


贵公司在哪个层次上最难找到所需的合适人才？ N=491
At which level is it difficult to find suitable human resources for your company?



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?

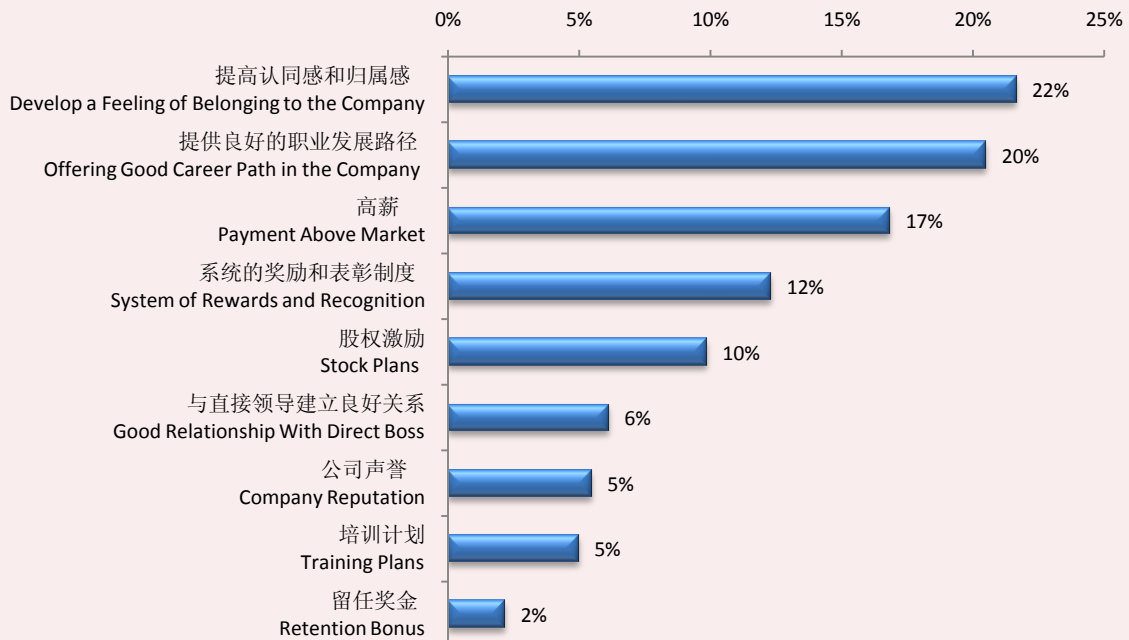


“其他”包括：公司所处位置离城区较远，公司发展太快，机制，人力部门的经验能力，公司还处在风险期，公司文化等。

The “other” category includes: Remote location of organization, fast growth of the organization, HR’s lack of experiences, organization being in a difficult economic situation, organizational culture, etc.

就贵公司而言，最有效的人才挽留手段包括什么？

What measures do you find most efficient in retaining employees?



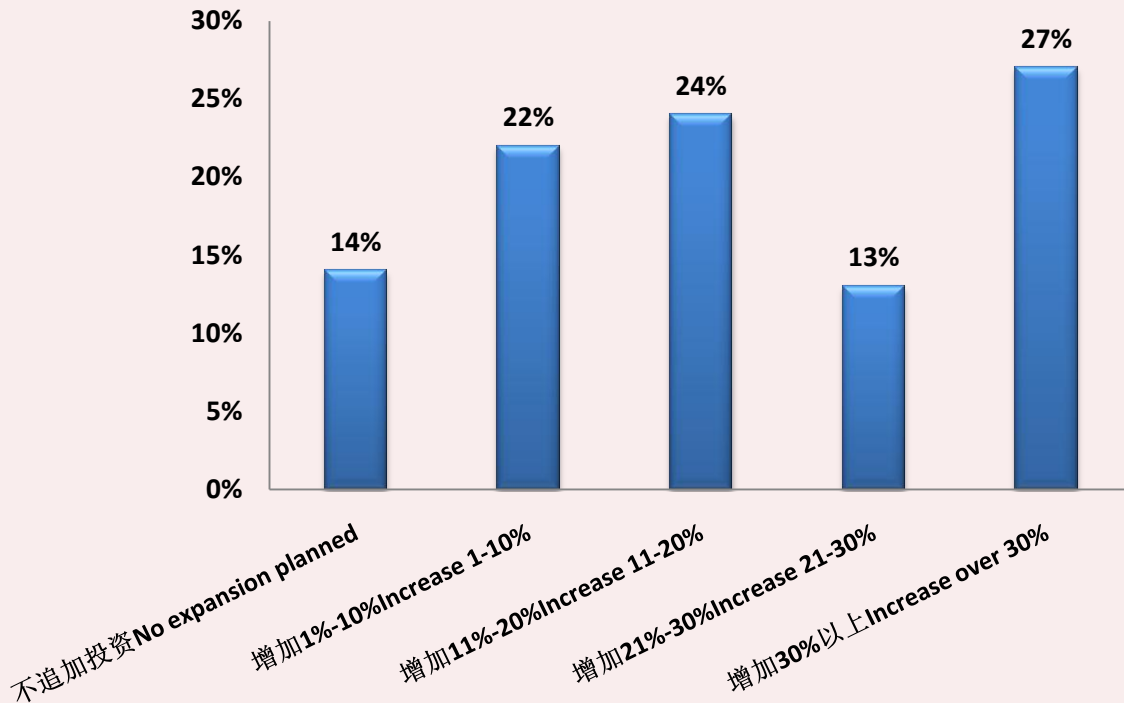
“其他”包括：雇用回国人才，对员工的感情投入，共同的使命等。

The “other” category includes: Employment of those who studied or worked overseas, caring for employees, a shared mission, etc.

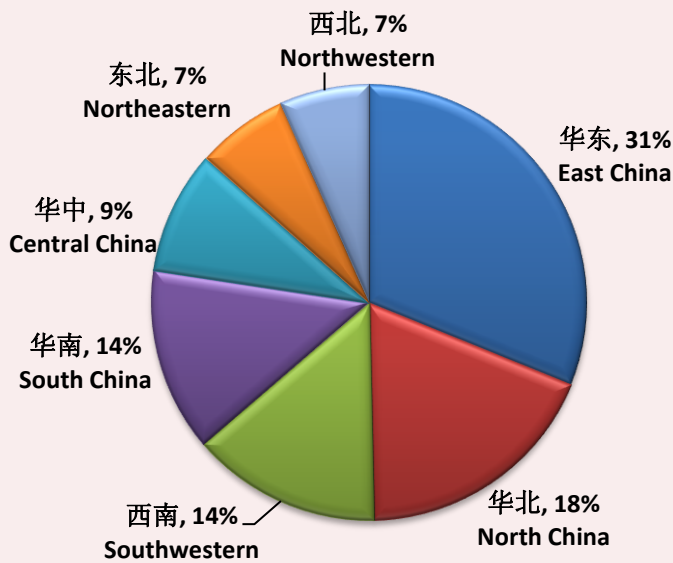
投资与融资

Investment and Financing

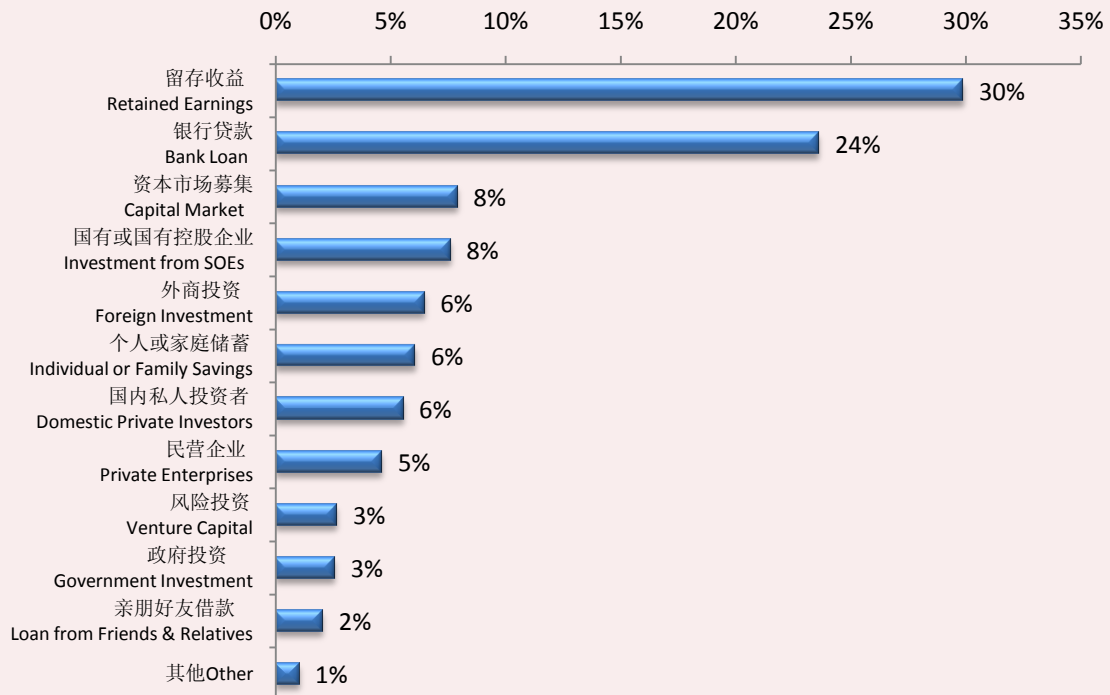
贵公司是否计划在 2011 年增加投资？ N=650
 What investments do you plan in 2011?



未来三年中，贵公司打算在国内哪些地区进行投资？ N=637
 Where in China do you plan to invest in the next 3 years?

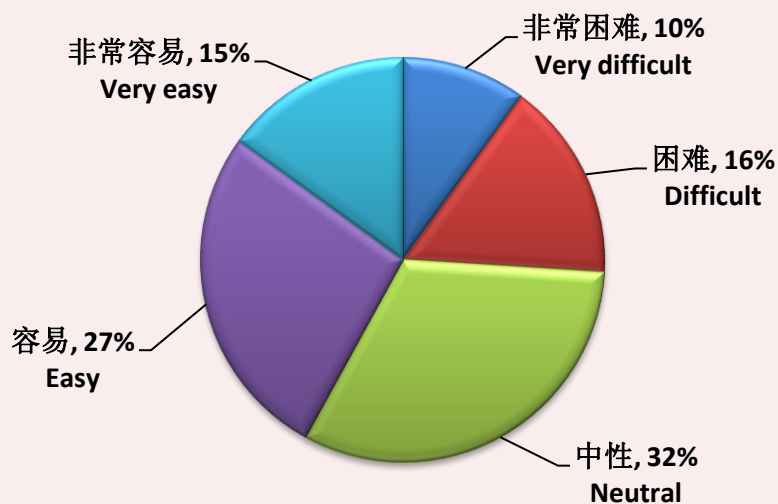


贵公司目前经营与投资项目的
主要资金来源是什么？
Which are the main sources of funding for your company?



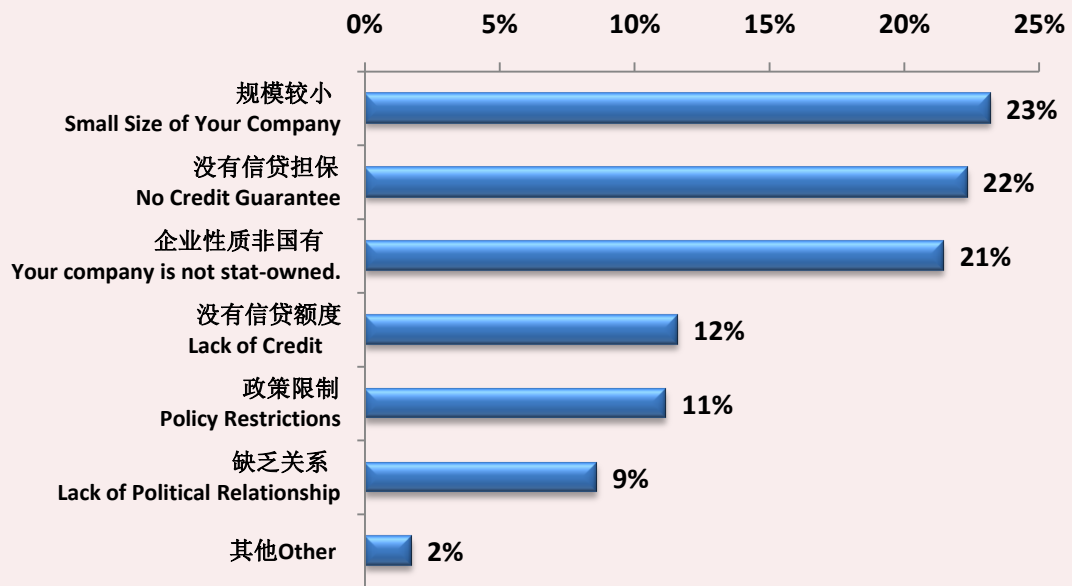
“其他”包括：企业年金及养老金，无息负债，员工投资，供应商融资等。
The “other” category includes: Company’s pension fund, free interest loans, employees’ investment, financing from suppliers, etc.

贵公司容易获得银行贷款吗？ N=487
Is it hard for your organization to get loans from banks?



贷款难的主要原因是什么？

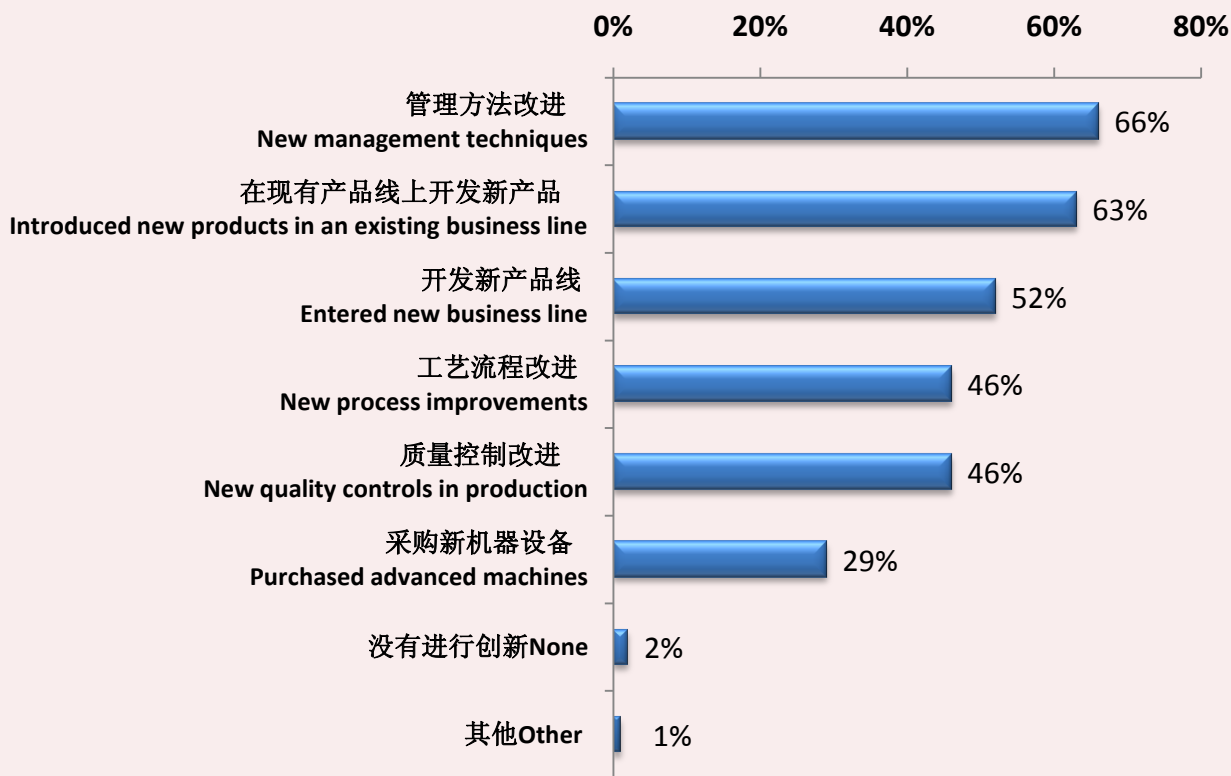
What are the main reasons for not being able to obtain bank loans?



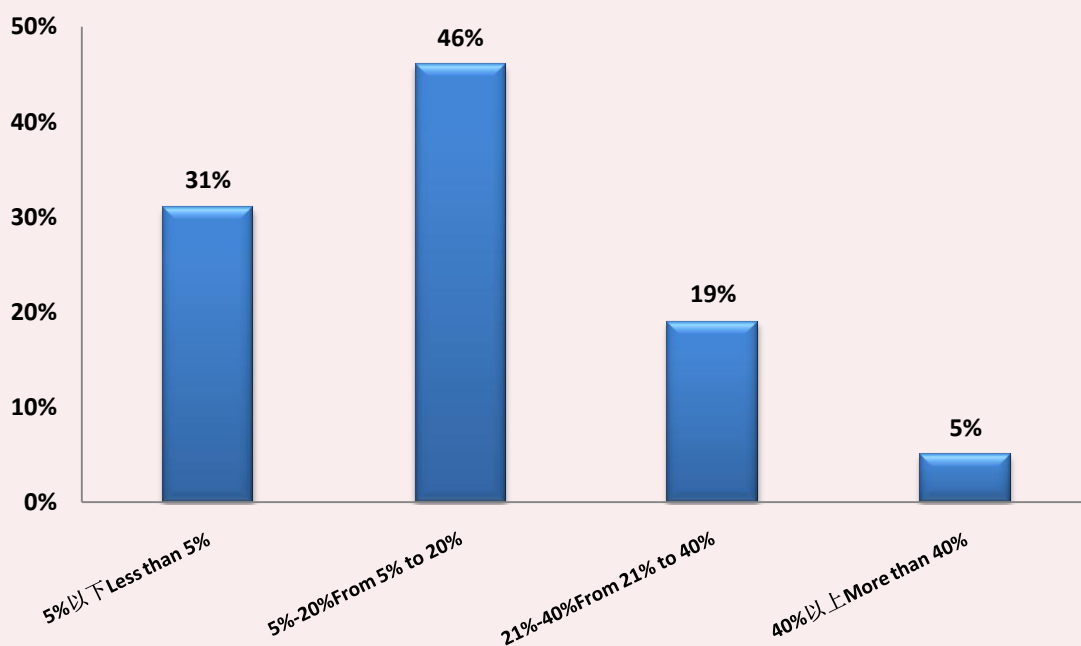
创新与研发

Innovation and R&D

今年以来，贵公司在哪些方面进行了创新？ N=246
 What types of innovation have you introduced since the beginning of 2010?

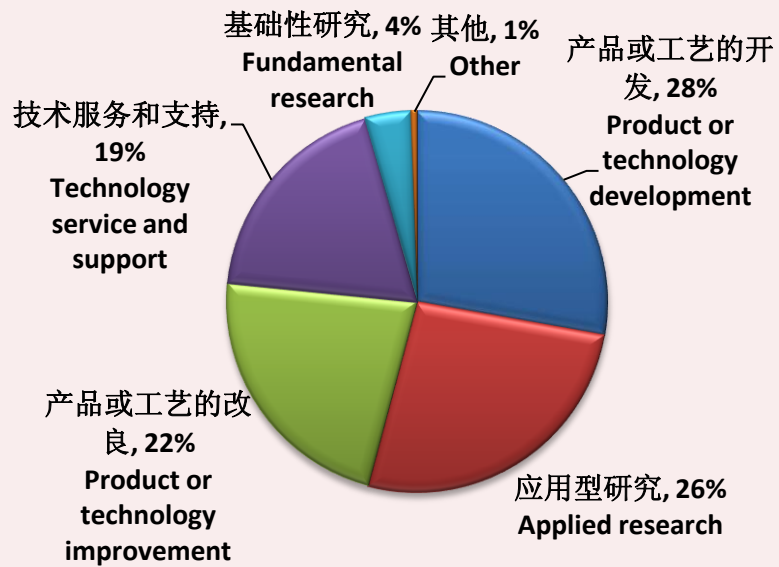


今年开发的新产品约占销售收入的百分之多少？ N=203
 For new products introduced in 2010, what percent of total sales do they account for?

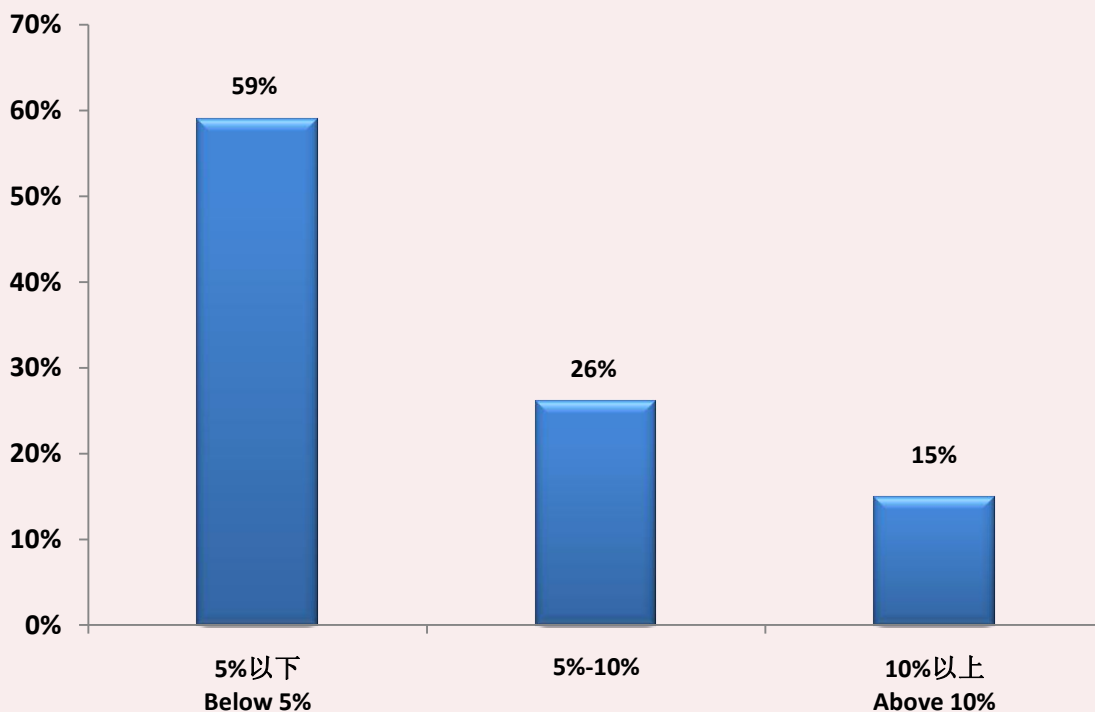


注释：78%的受访者所在企业有研发活动。
 Note: 78% of the respondents' organizations have R&D activities.

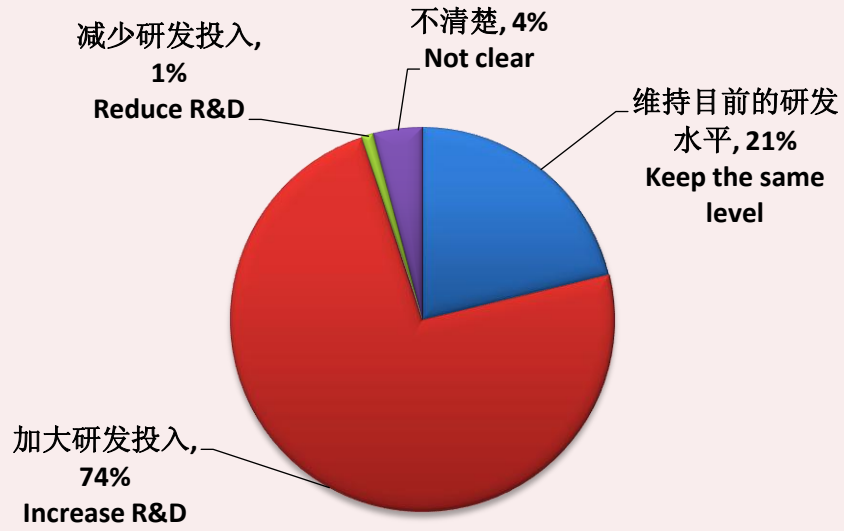
贵公司进行的研发属于哪一类型？ N=246
 What type of R&D activities do you do?



贵公司每年研发支出约占销售收入的百分之多少？ N=406
 What is your annual expenditure on R&D as a percent of sales?



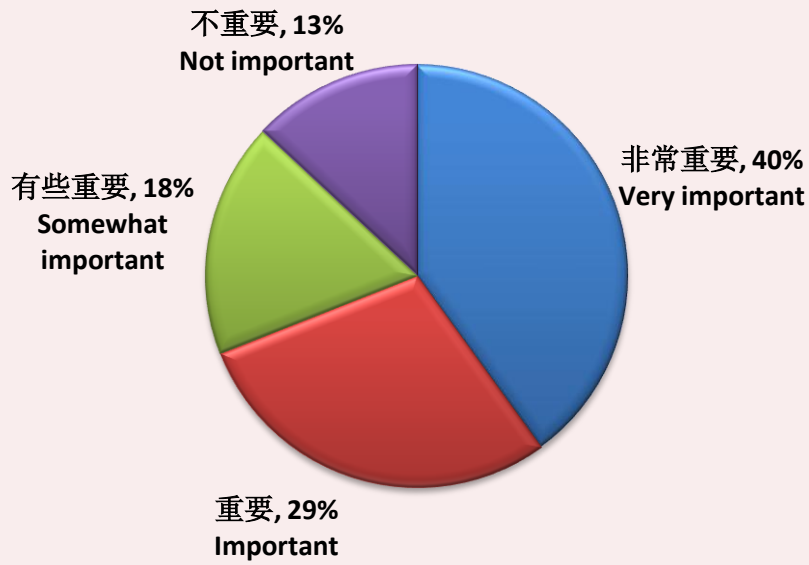
在未来 3 到 5 年，贵公司在研发方面有何打算？ N=412
What are your plans for R&D in the next 3-5 years?



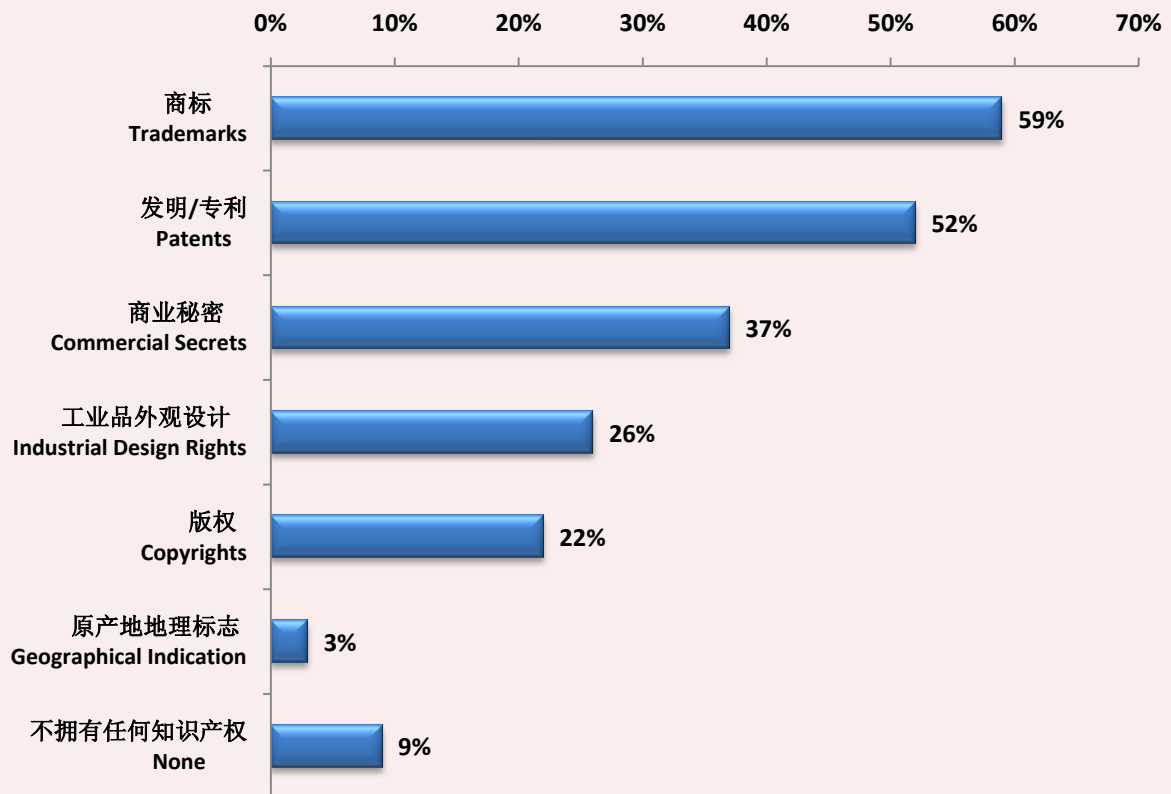
知识产权

Intellectual Property Rights

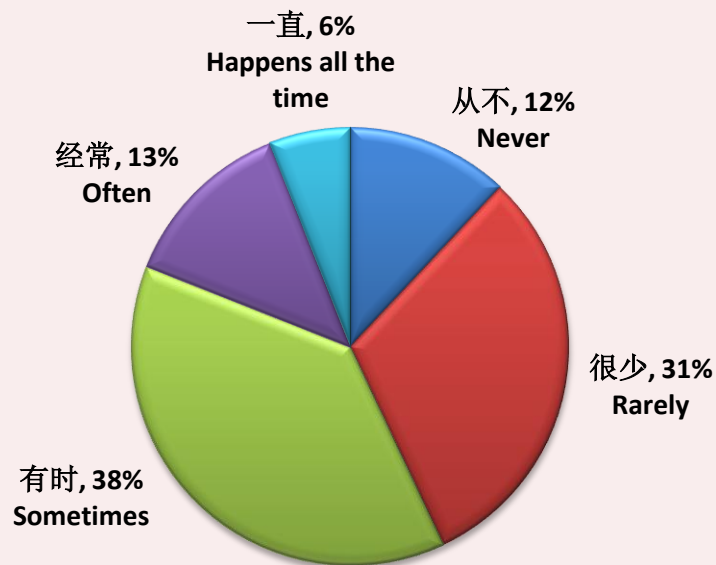
知识产权对贵公司业务是否重要? N=536
How important is IP (Intellectual Property) to your business?



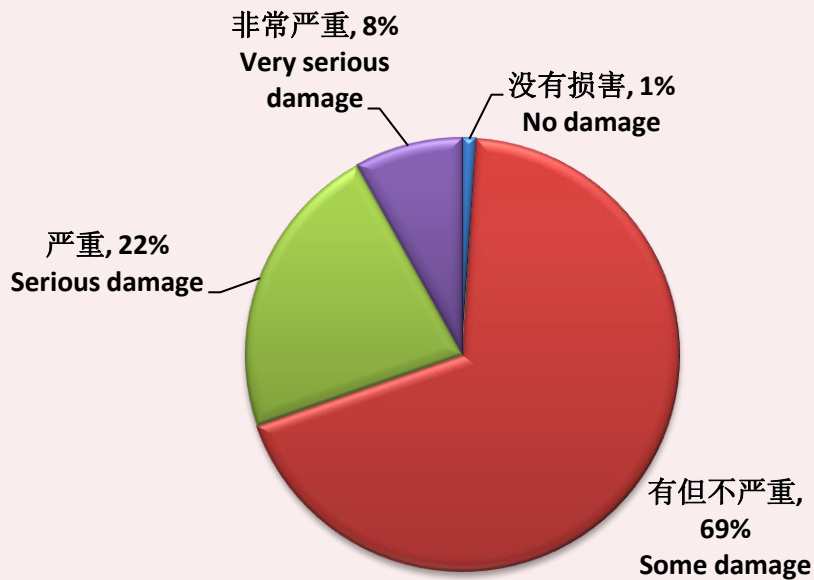
贵公司拥有哪种类型的知识产权? N=465
What type of IP do you own?



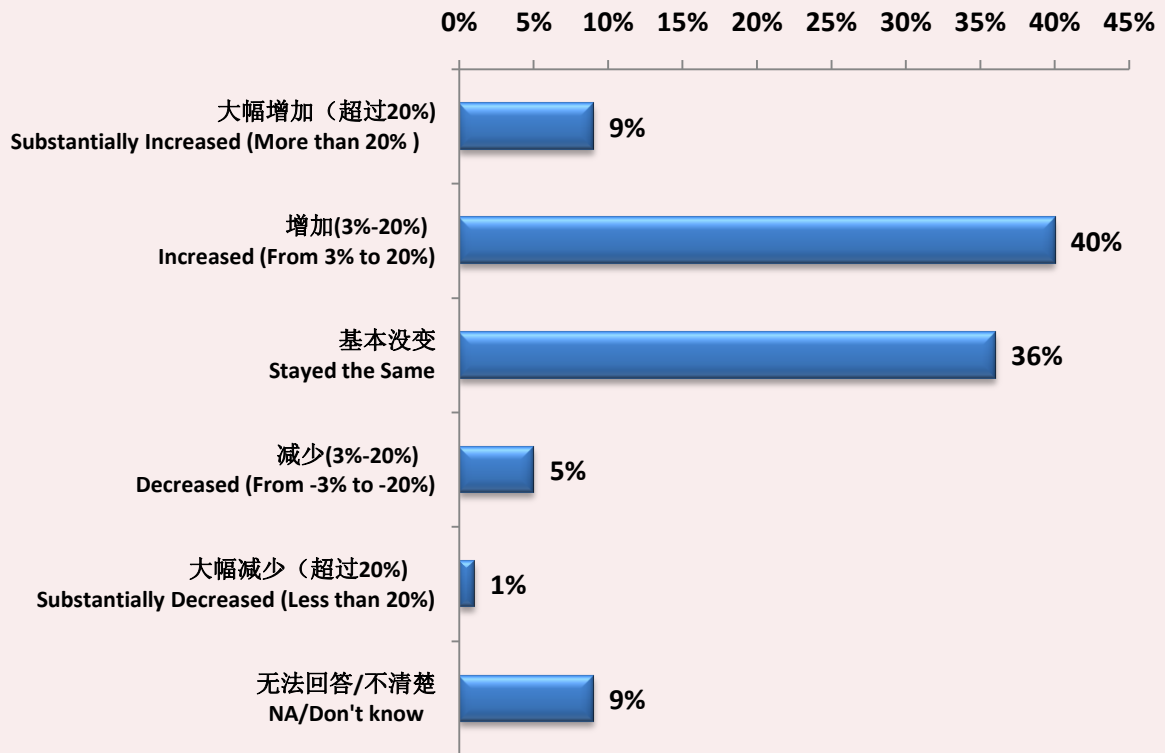
在 2010 年，贵公司的知识产权是否经常受到侵犯？ N=424
How often has your IP been infringed in 2010?



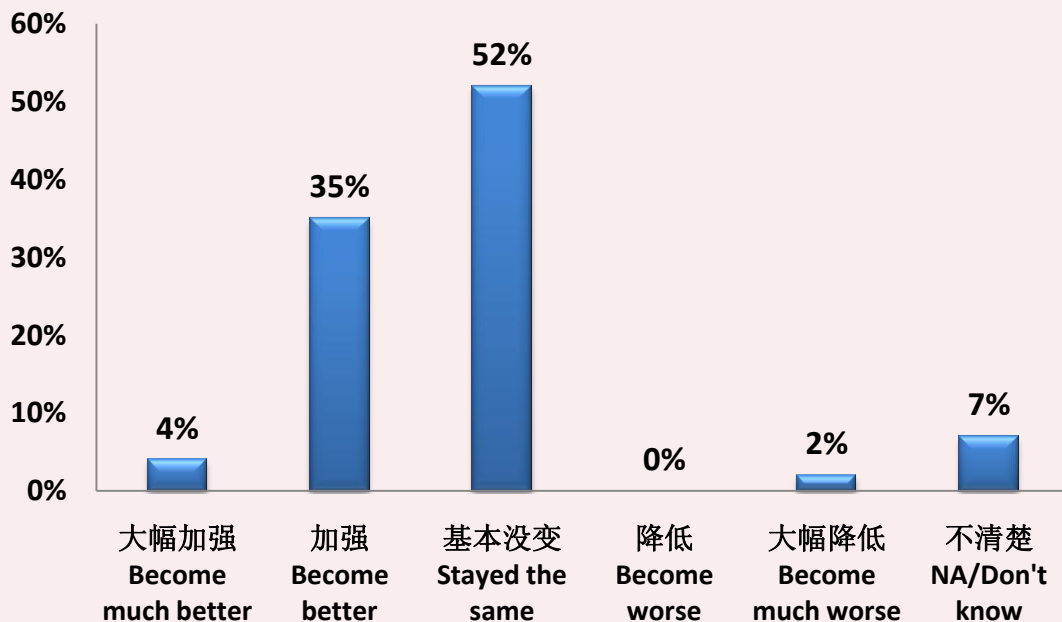
知识产权被侵犯对贵公司业务造成的损害有多大？ N=241
What is the extent of damage caused by IP infringement in your business?



相比过去三年，贵公司知识产权被侵犯的次数是多少？ N=240
 Compared with the past three years, would you consider that the amount of IP infringements in your business has ...?



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=241
 In the past three years, how do you describe the IPR protection from the government?



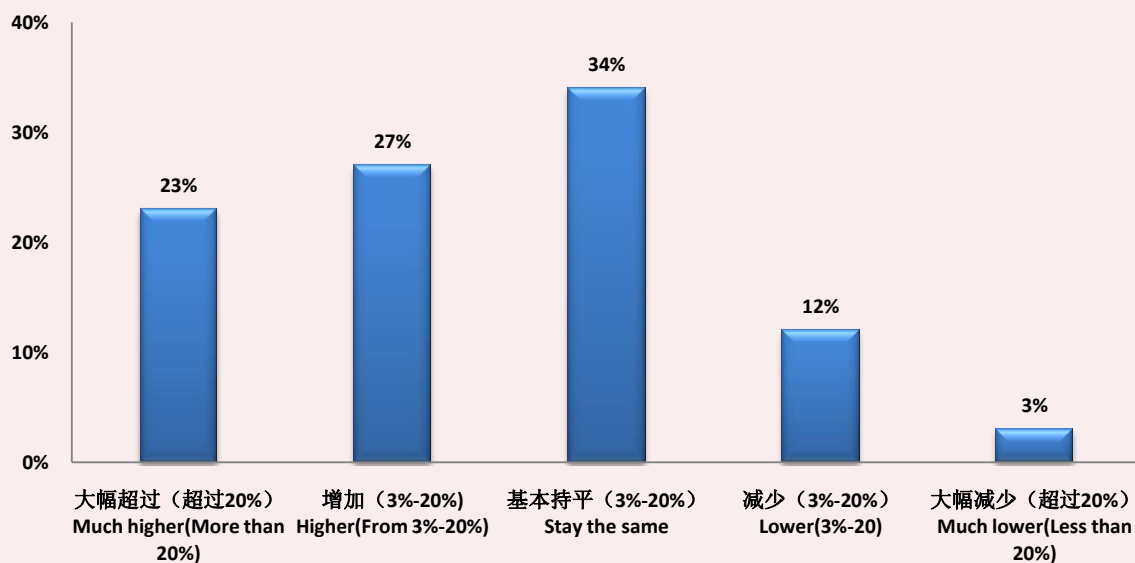
第五部分

Part V

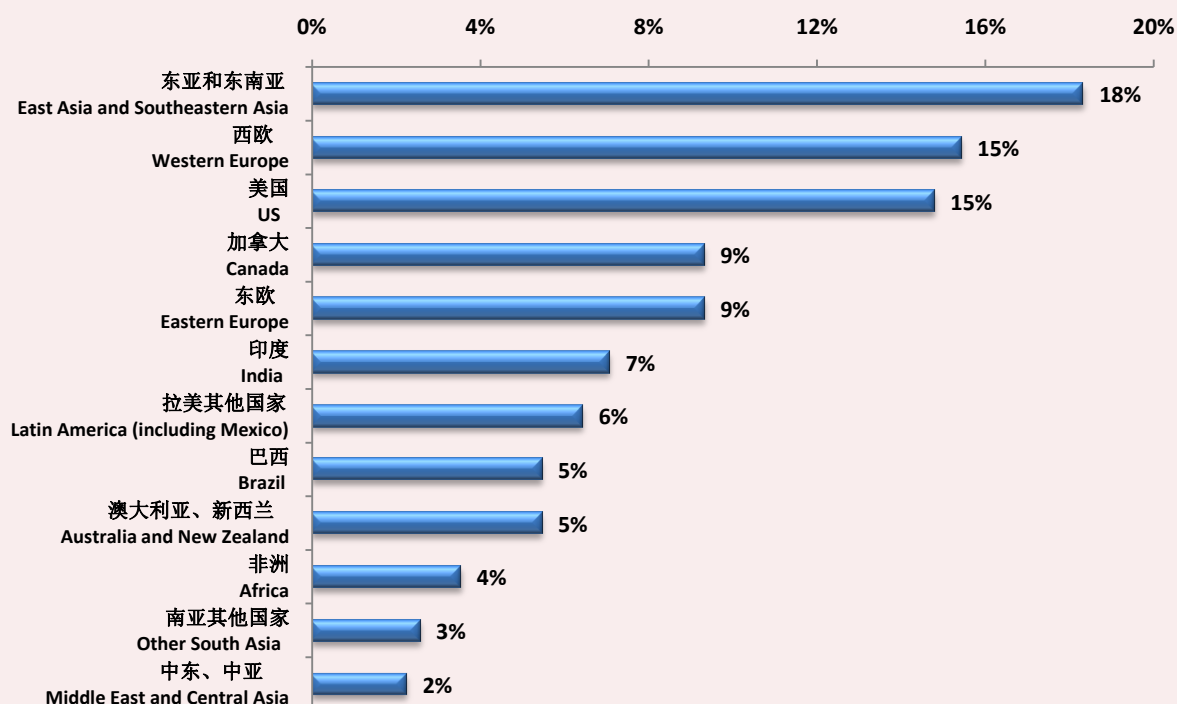
外贸与对外投资

FOREIGN TRADE AND OVERSEAS INVESTMENT

贵公司今年的出口收入较 2009 年情况如何？ N=234
How are your exports in 2010 compared to 2009?



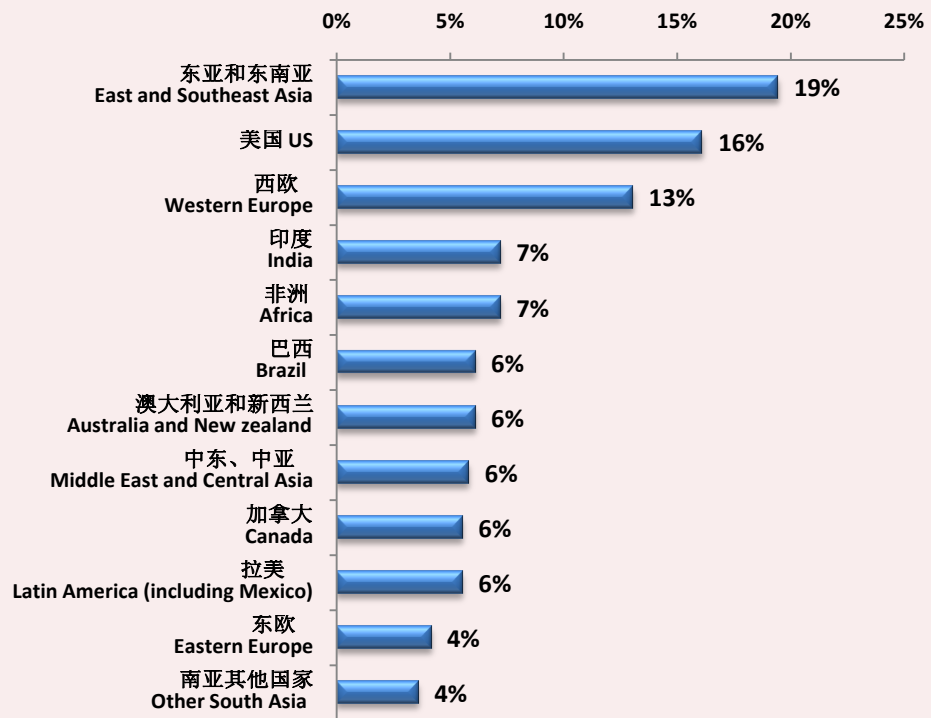
海外工厂位于分布在哪里？ N=86
Where are your overseas plants located?



注释：28%的受访者所在企业在海外有工厂。

Note: 28% of the respondents' organizations have factories overseas.

您打算在海外投资哪里？ N=412 Where do you plan to invest overseas?



注释： 22%的受访者所在企业有海外投资计划。

Note: 22% of the respondents' organizations have plans to invest overseas.

谢谢!

THANK YOU!

中欧国际工商学院教授团队

The Research Team

