

郭广昌： 从三次争论 中学到的

Guo Guangchang: What I've Learnt from Other Masters

4月26日，复星集团董事长郭广昌做客中欧国际工商学院20周年校庆系列活动“大师课堂”，发表了题为“中国企业全球化战略：反向整合资源”的演讲，并在演讲中分享了自己与一些中国知名企业家的交往。本文系根据演讲内容整理而成。



做 企业这些年来，我觉得最重要的是倾听别人的声音。最近我时常回想，这二十多年来，在与中国企业界的交流中，我其实从其他企业家身上学到很多东西，这里借其中三次比较深入的讨论，与大家分享我一下从中得到的启发。

第一次比较大的讨论是与王石的所谓“专业化与多元化之争”。从我个人来说，这次讨论非常重要。它让我意识到，一个企业如果做多产业的运营，就已经是在做投资了。你可以请这个行业最优秀的人来做，是能做到很专业的。最重要的决定是如何分散资源。复星已经意识到自己是一个投资集团。作为一个投资集团，资金、人才、项目等都很重要的，但是精力的分配也非常重要。如果你的核心团队还沉浸在单个行业的运营中，陷在里面的话，就会把最重要的工作给忘了。

也有一种说法叫做“同心多元化”，认为将一个行业做得特别优秀之后再去做别的，结果会更好。但我觉得，如果把一个行业做得很强，那种固有的观念和想法恰恰会阻碍你在别的行业投资。所以我觉得多行业作为投资来说是可行的，但作为运营来说可能不行，你必须要有专业团队去做，这就是与王石争论后我思考得出的结论。



On April 26, Fosun Chairman Guo Guangchang spoke about “Strategies for Chinese Companies Going Global: Role Reversal in Integrating Resources” during a Master Class, one of a series of lectures being held to mark CEIBS’ 20th anniversary. He drew heavily on lessons he’s learned from some of China’s best known business figures. Here are excerpts from his speech.

“Looking back on my path as an entrepreneur, I think it’s been important to listen to others and try to learn lessons during conversations. During the past 20 years I’ve learned a lot from conversations with many major business figures, and I’d like to share with you my thoughts about three of these discussions.

The first conversation was with Vanke’s Wang Shi. We talked about specialised operations vs diversified operations. The conversation made me realise that an enterprise can do well in multiple industries, through investment, and it won’t necessarily be unprofessional, because it can hire the best teams in those industries to handle operations. What’s most important

is that it should properly allocate its resources, like Fosun has done as an investment group. So in my view, for an investment group, the source of capital is very important. Of course talented employees and project knowledge are also important, but knowing how to allocate resources is crucial. An investor should always ensure that he makes the right decision about these important factors, instead of having the core team being stuck operating one single industry.

Based on the theory of diversification, extraordinary success in one industry may be a huge help for new investment in another. But those fixed mind-sets and stereotypes brought by success might instead block the new investment. So while it’s worthwhile to be a good multi-

industrial investor, it might not be possible to be a good multi-industrial operator. To be a good multi-industrial investor we have to hire industry professionals to handle the job and look at it as an investment – that’s what I learnt from my conversation with Wang Shi. That’s why Fosun now clearly defines itself as an investment group.

In the future, we will move ahead on two “tracks”, one is to be a financial group with the insurance business at the core, while the other track is to be a China-rooted global investment group with a multi-industrial foundation. Those are our two goals, which were inspired by the conversation with Wang Shi. I really appreciate that he was willing to share his insights with me, though he’s more well-known than

“企业要有活力，哪怕有一点混乱都不怕。最怕的是看上去完美，其实已经完了。”

因此，复星集团现在非常明确地提出，我们是一个投资集团。

复星未来有两个轮子：我们要打造以保险产业为核心的金融集团，我们还希望成为具有深厚产业基础、植根于中国的全球投资集团。这是我们设定的目标。一步步走到今天，与那场争论很有关系。因此我从心底感谢王石先生。当时他的声望比我高很多，但我觉得中国企业界最让我佩服的一批人都是这样，他们可以放下身段和大家讨论一些问题，而不是用权威去打压别人。

另一个看上去跟企业管理毫无关系的争论，对我的影响也很大。我跟马云都练太极拳。马云的师父是非常正宗的门派传人，再加上马云天生聪明，因此他直接从高处落手，一开始就讲究神气相通、流畅，等等。而我练的叫易太极，讲究准确性，每个动作都要到位，就像写毛笔字一样，从一撇一捺开始学。马云认为我太认真了，而我也反击，他不是用身体在练，是用思想在练。

我和马云关于怎样练太极的争论，让我想起佛教界很有名的争论：顿悟和渐悟。有些人也许上辈子做了很多修行，哪怕没怎么读过书，但他有慧根，可以走顿悟的道路，突然哪一天明白了，就成了佛。另一种人天性比较愚钝，上辈子没有好好修行，就像我这样的人，目标应该怎么设定呢？我可以每天悟一点点，就算这辈子成不了佛，下辈子也有希望。

太极就是这样，其中没有对错，只与一个人的禀赋和天性有关。其实做企业也一样，有些人可以走顿悟的道路，比如马云、马化腾，找到一个商业模式，一下子就一千多亿美元的市值。但不是所有人都能学。复星起步就是一个三无企业，没资金，没技术，没人才。我这样的人，虽然成功的速度和程度跟他们不能比，但毕竟可以一步步去做。

走向全球

2004年，我们下决心一定要将资金渠道打开，否则成不了一流的投资集团，因此我们用了三年的时间实现上市。2007年复星国际在香港上市，这至少帮助我们解决了两个问题：一是我们拥有了一个全球化的融资平台，二是为此后复

星的全球化打下了良好的基础。

但即使在这种情况下还是有问题，那就是我们想做的事情跟我们拥有的资金之间还有差距。复星上市之后，我们就在思考一个问题，复星未来到底要走什么模式，我们要从哪些方面去突破。

我们要从两个方面着手。第一，在投资能力方面，我们已经有香港这个平台，一定要往全球化的方向去走。那时候复星在投资方面面临的竞争已不仅来自中国企业，很多项目是在跟黑石（编者注：黑石集团是全球最大的独立另类资产管理机构之一）竞争。他们具有全球整合资源的能力，而复星没有，在竞争中我们就处于劣势了。我们必须把劣势变成优势，因此我们提出了一个战略，叫“中国动力嫁接全球资源”。我们当时设想，要跟黑石竞争的话，我们的优势在哪里？那就是我们懂中国，能够帮助全球投资型企业在中国发展。

但我们的劣势在哪里？劣势就是我们的全球眼光、全球组织资源的能力还不够，因此提出“中国动力嫁接全球资源”，用我们的优势去打击别人的劣势。

适度混乱

第三次争论是私下发生的。李彦宏最近跟我说，未来机器会比你聪明。而我的观点是，机器永远不可能代替人，因为人是有自由意志的，可以做未必完全出于自身利益的选择，没有被设定的程序。我最近看了马化腾的内部演讲稿《打造一个可以进化的生物组织》。大家开始关注一个问题：企业组织是不是应该像计算机一样准确，没有混乱，还是更像一个生物体，可能里面有灰度和混乱？答案是后者。有些人跟我说，要打造一个百年组织，确定一套一百年都管用的东西。怎么可能呢？我更倾向于认为，企业要有活力，哪怕有一点混乱都不怕。最怕的是看上去完美，其实已经完了。

复星一路走来，每一个来到复星的人都会问这样一句话，怎么这么乱啊。可能过了一个月还不知道向谁汇报。我现在在大概有三分之一的的时间花在招人上。最后我会问招来的人，你还有什么要问我的。他也许会问，你觉得这个项目的KPI（关键绩效指标）应该怎么定，你有什么宏伟目标。我就对他说，我的特点是这样的，我会告诉你我提供的一些什么，资金我会保证，平台、资源，包括我的个人资源，你都可以用。你叫我做什么，我就帮你做什么。但你能做多少也请告诉我，如果你不告诉我，没有一个很好的目标的话，我觉得你也别做了。很多人会跟我说，有个项目我去谈了，复星的另外一个团队也去谈过了。我说蛮好的，你们两个一起。我这么做是因为开放性能够保证企业永久的活力。



I am. I've found that those Chinese business figures that I admire most are all willing to share their thoughts with and listen to each other, instead of exerting power over others. That's really important.

The second thought-provoking conversation is one I had with Alibaba's Jack Ma. It was about *tai chi*, which may seem to have nothing to do with corporate management. Jack Ma introduced me to my *tai chi* teacher, who he actually thought isn't a good teacher. But I worked very hard with my teacher to learn *Yi tai chi* – even though Ma said I didn't have to. *Yi tai chi* focuses on the accuracy of every motion, by which one can facilitate the circulation of *chi* and blood, and be fully vitalised through this process. However, with the help of his *tai chi* teacher, who is an authentic master,

and relying on his gifted high-level perception, Ma focuses more on spirit enlightenment and *chi* circulation than on accuracy. In my view, he's practicing with his mind instead of his body.

Talking with Ma reminded me of two well-known concepts in Buddhism – sudden enlightenment and enlightenment in meditation. People with high-level perception and who are gifted with wisdom, even if they're not educated, might achieve success by sudden enlightenment. But for those who are not that gifted and intelligent, like me, what shall we do to get enlightened and achieve success? We need to believe in enlightenment in meditation.

The same goes for *tai chi* – it's not about right or wrong. It's about gift, natural talent. And it also applies to entrepreneurship. Entrepreneurs such as Jack Ma and Tencent's Ma

Huateng can achieve success by sudden enlightenment. They suddenly found a successful business model and received a market value of over a hundred billion. However if we think it through, we will know that their stories are legends that cannot be learnt and created by everyone. But you can learn from me. Why? Because Fosun began from scratch in 1994. At that time we had no money, no technology, no MBA. Though we didn't achieve a quick and huge success as Alibaba and Tencent did, we took it step by step and also became successful.

Going global

In 2004, we were determined to open up the financing channels; that was the only way we could be a top-ranked investment group. So what did

“ Our advantage came from knowing China better than any outside company could. ”



we do? We spent three years getting listed in Hong Kong. Fosun International was listed in Hong Kong in 2007, and it had a positive impact. At the very least, it solved the financing problems because by going public we could enjoy the global financing platform. Besides, it laid a solid foundation for us to go global.

However, gaps still existed, and our capital was still insufficient for what we needed for future development. So after the company was listed in 2007, we began to think about which future path we were going to take, and where we should look for breakthroughs.

Then we decided on our main areas of focus for the future. One focus is to enhance our investment capability. Because we had already listed in Hong Kong, I thought it was time to go global. At that time we faced fierce investment competition, and our competitors were not just Chinese companies. Blackrock was also a competitor then. They were good at integrating global resources, which was exactly what Fosun lacked. We were at a disadvantage in competition, and we had to reverse the situation. So we came up with a strategy, which needed other Chinese companies to go global and integrate global resources. We all knew that to win the competition, we had to be clear about our strengths and weaknesses. Our advantage came from knowing China better than any outside company could, and our capability to help global companies develop in China.

But what about our weakness?

Our weakness was the lack of a truly global vision and organising capability when it came to global resources. So we needed Chinese companies to go global

and integrate global resources, and through this we could give full play to our advantages.

Method to the madness

Some people have advised me to establish a corporation with a set of clearly defined systems which we can successfully apply forever. But I think that's absolutely impossible. I prefer to establish a corporation with a lot of vitality, even if it's a bit messy in its organisational structure. This kind of corporation is much better than one that seems perfectly organised but is really going downhill. Many companies fail even when they seem perfectly organised.

Throughout Fosun's history, every new employee feels the disorder within the company and might not even know whom they should report to after one month on the job. I now spend a third of my time on recruitment. At the end of job interviews, I usually ask candidates if they have any questions. Some ask me about the project, our KPIs, our goals and their future prospects. Then I will tell them how Fosun rolls. In Fosun you tell me what I need to provide for you, and I will provide the money, our platforms, and our resources, whatever you need. You can even ask me to assist you, and I'll always be ready to help, but only if you tell me your goal. If you can't tell me your goal, or your goal doesn't seem like a good one to me, then I won't let you go ahead with the project. Sometimes when two of my teams separately tell me their plans to do the same project, I will encourage the two teams to work together on it. The point I'm making is that openness ensures a company's lasting vitality.”



2014第十二届中国汽车产业高峰论坛

CEIBS 12th Annual China Automotive Industry Forum 2014

10月25日 | 中欧国际工商学院上海校园

智能城市与汽车产业: 中国与世界

随着全球城市化进程的推进, 城市规划和管理将从根本上影响其宜居程度。中国的城市交通问题尤甚于世界其他任何国家, 要予以纾解, 唯有多管齐下: 让公交担纲主力, 鼓励人们以多种方式拼车出行, 出台各种私车限行措施等等。市政府和消费者固然是推动这一大势的主力军, 汽车产业包括乘用车和商用车更是一股不可或缺的关键力量。汽车产业必须与其他利益相关者持续对话, 才能为城市提供恰当的交通运输工具, 而城市也应致力于为新点子和新技术的涌现提供一个适宜的环境。中国目前已发展成为全球最大的汽车市场, 并已接近发达国家的先进技术水平。全球性的发展趋势为中国市场带来了冲击, 而中国也应当有能力在城市化和交通运输维度上塑造或影响这一趋势。

拟邀请演讲嘉宾



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