

全球创业观察2017/2018中国报告
Global Entrepreneurship Monitor 2017/2018 China Report

二十国集团创业研究中心
The Entrepreneurship Research Center on G20 Economies
启迪创新研究院
TusPark Research Institute for Innovation

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发布背景

Background

- 该报告是中国自2002年加入全球创业观察研究以来第15个年度的中国报告。
This is the 15th year of the GEM China research since we have joined in the Global Entrepreneurship Monitor research in 2002.
- 该报告是二十国集团创业研究中心与启迪创新研究院联合发布的第四份全球创业观察中国报告。

This is the 4th consecutive GEM China report released by the Entrepreneurship Research Center on G20 Economies and the Tuspark Research Institute for Innovation.

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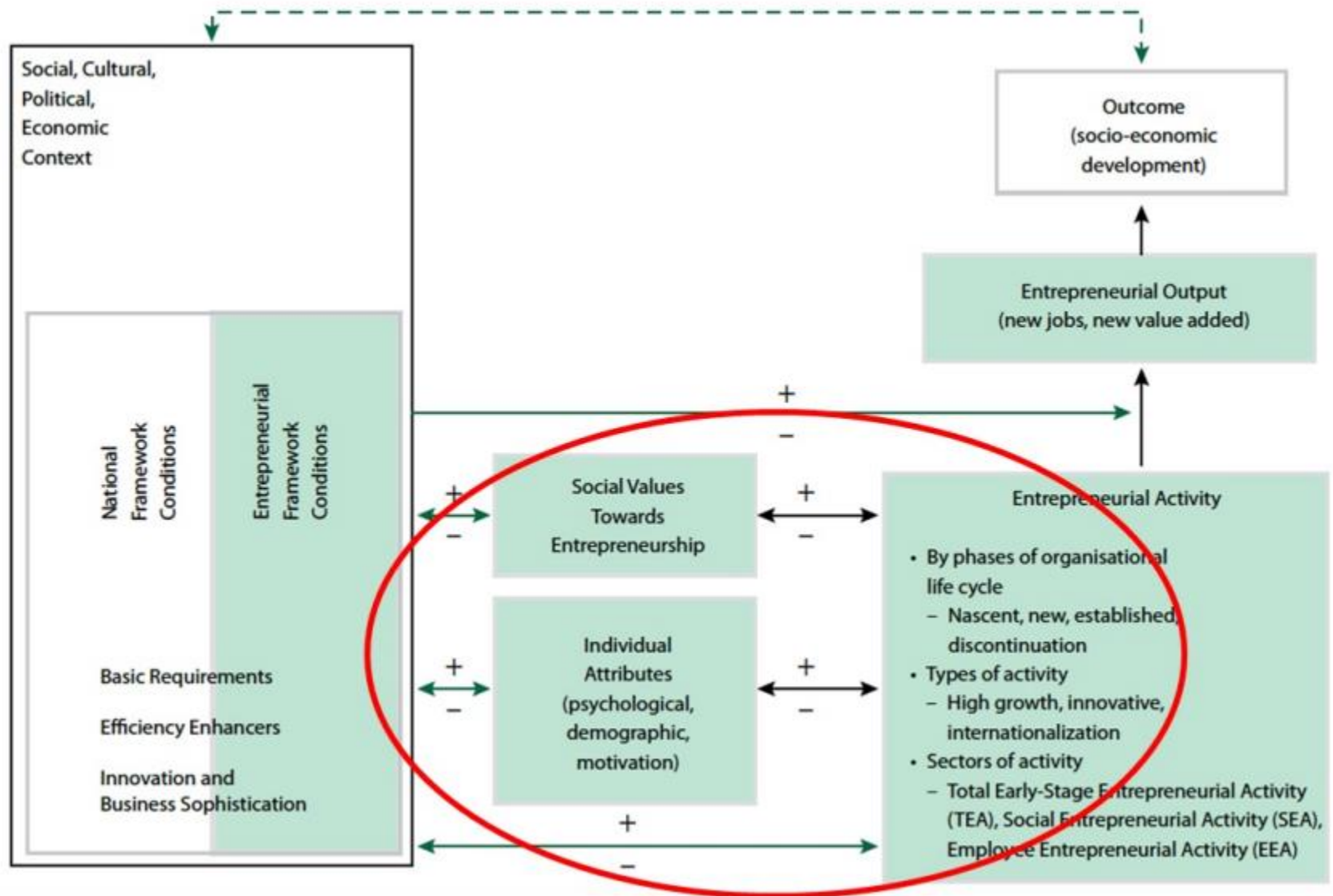
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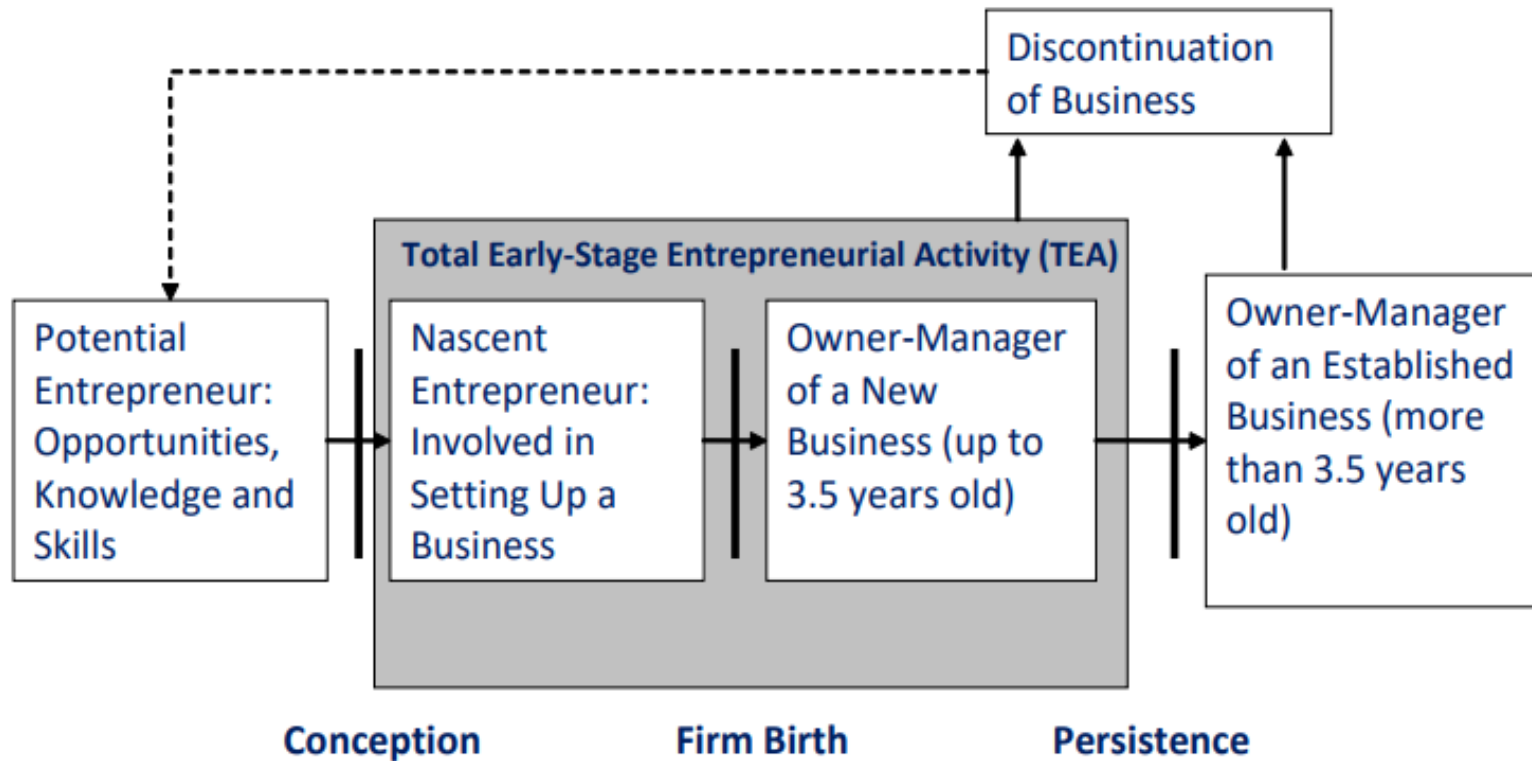
一、全球创业观察研究介绍

1. Introduction on the Global Entrepreneurship Monitor research

GEM的概念模型(The Conceptual Framework of GEM)



GEM创业过程分解(Phases of entrepreneurship in the GEM research framework)

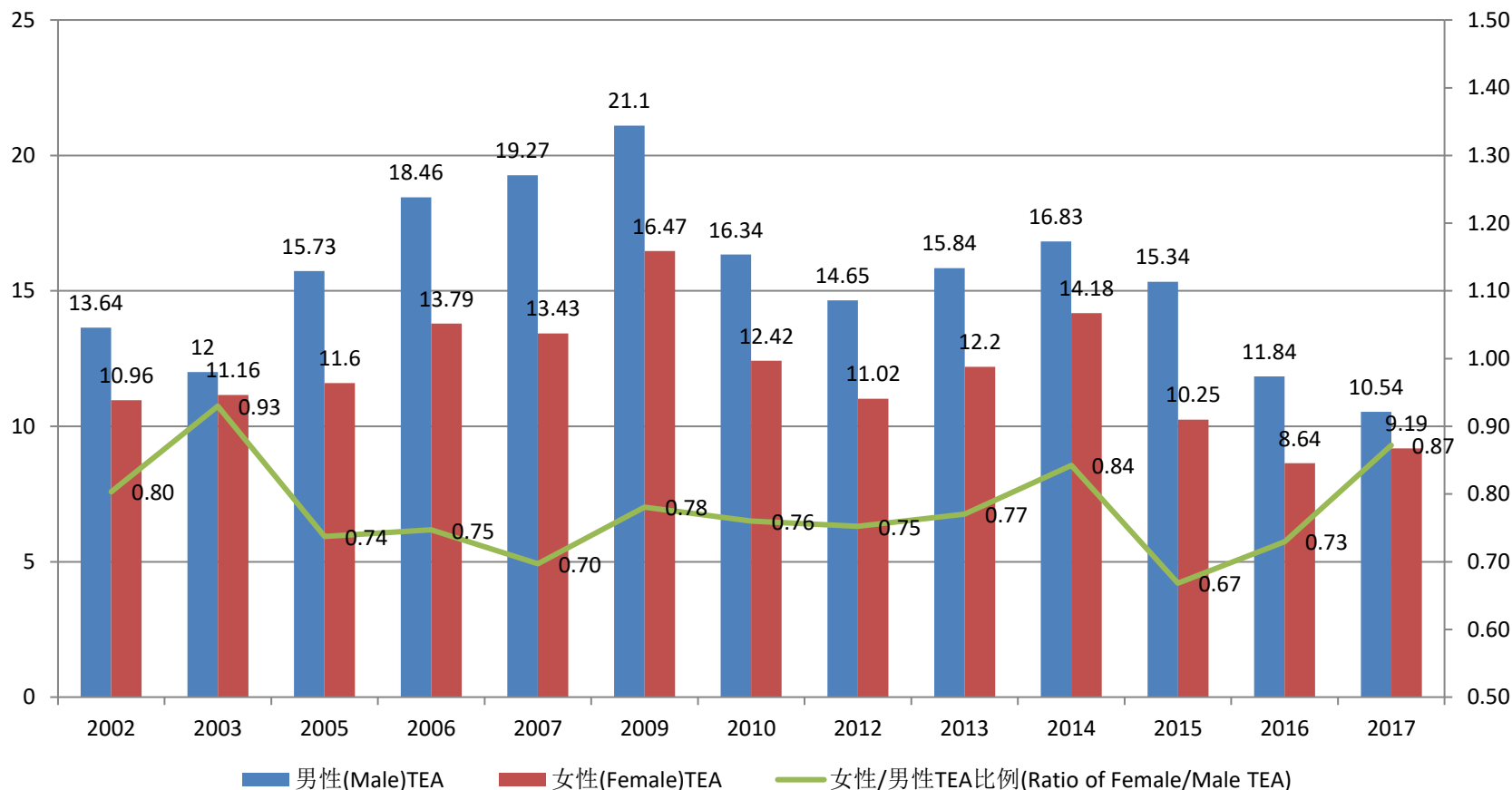


二、中国创业活动的结构特征

2. The structure and characteristics of the entrepreneurial activities in China

1. 结构分析：性别(中国男性创业者人数较多)

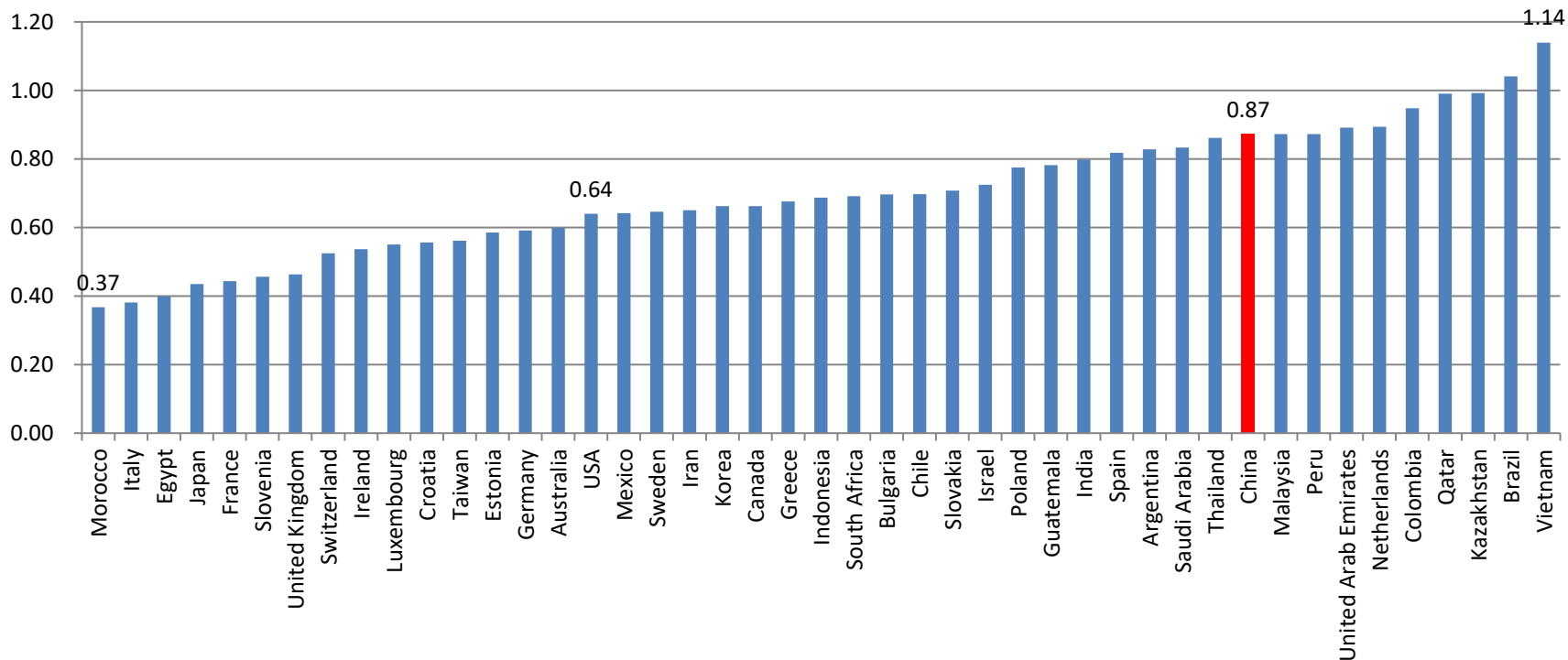
1. Gender(More male entrepreneurs than female in China)



1. 结构分析：性别 (中国女性创业相对活跃)

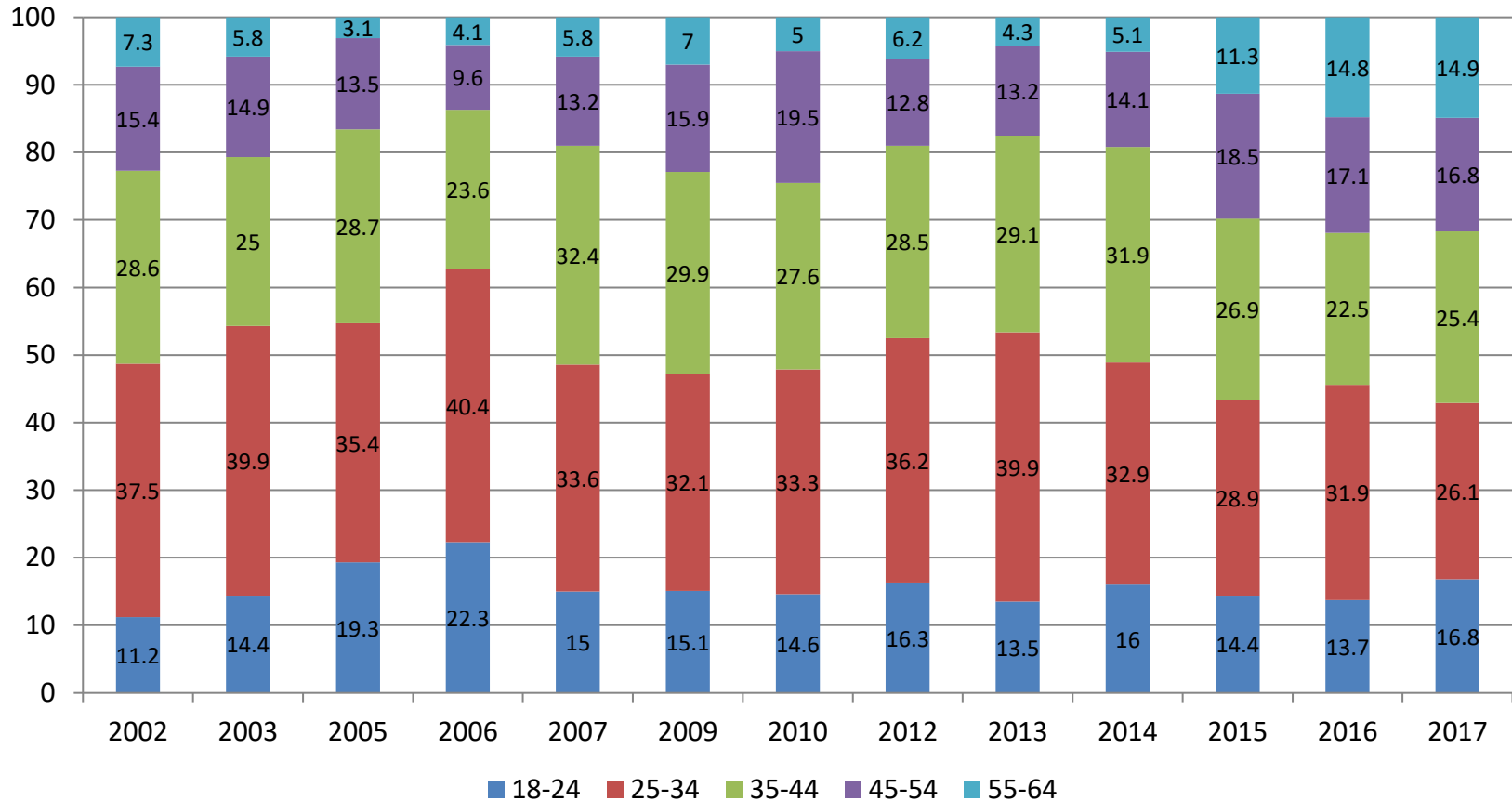
1. Structure analysis: Gender(The female entrepreneurship is relatively active in China)

女性/男性TEA比例(Ratio of Female/Male TEA)



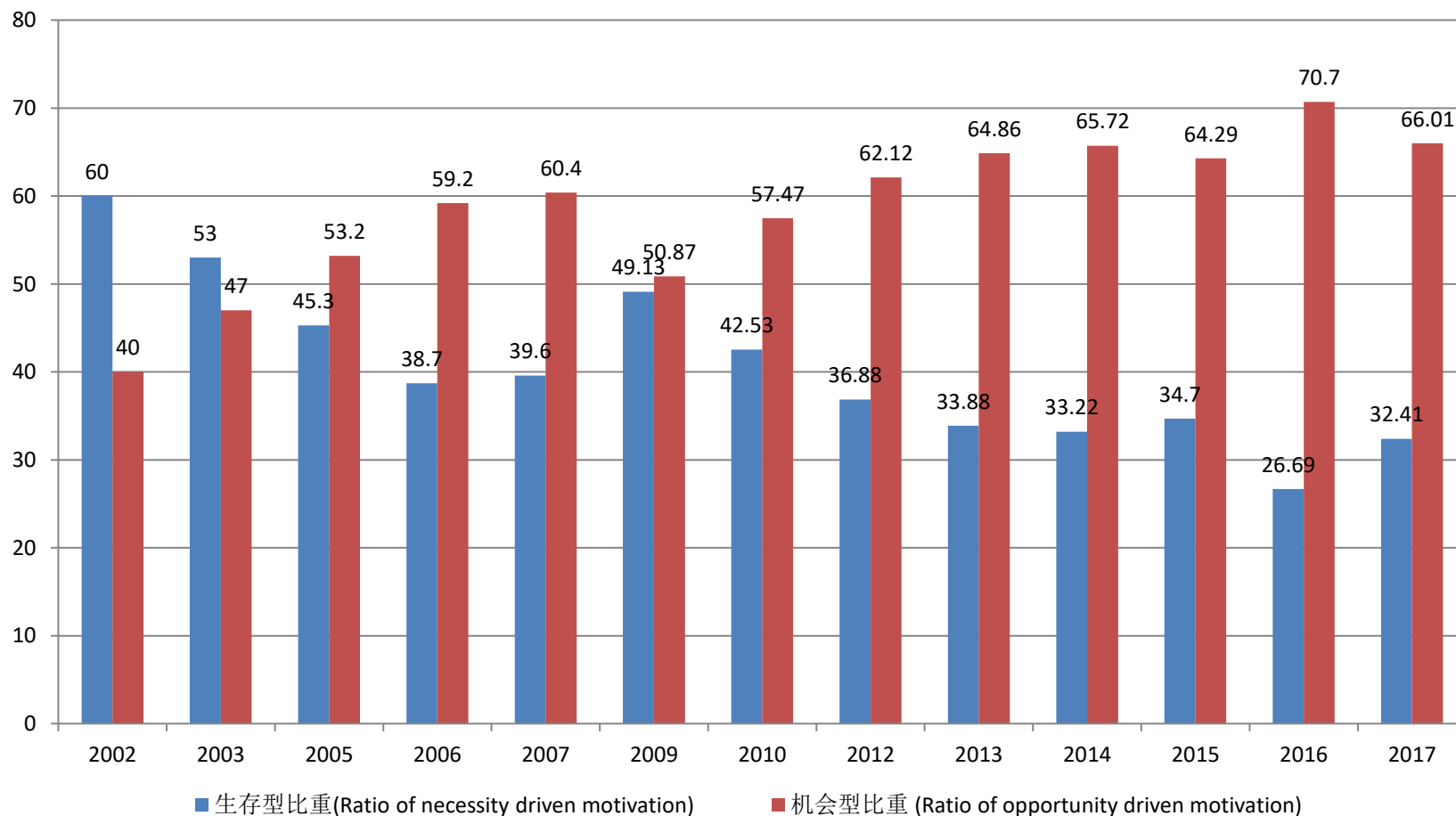
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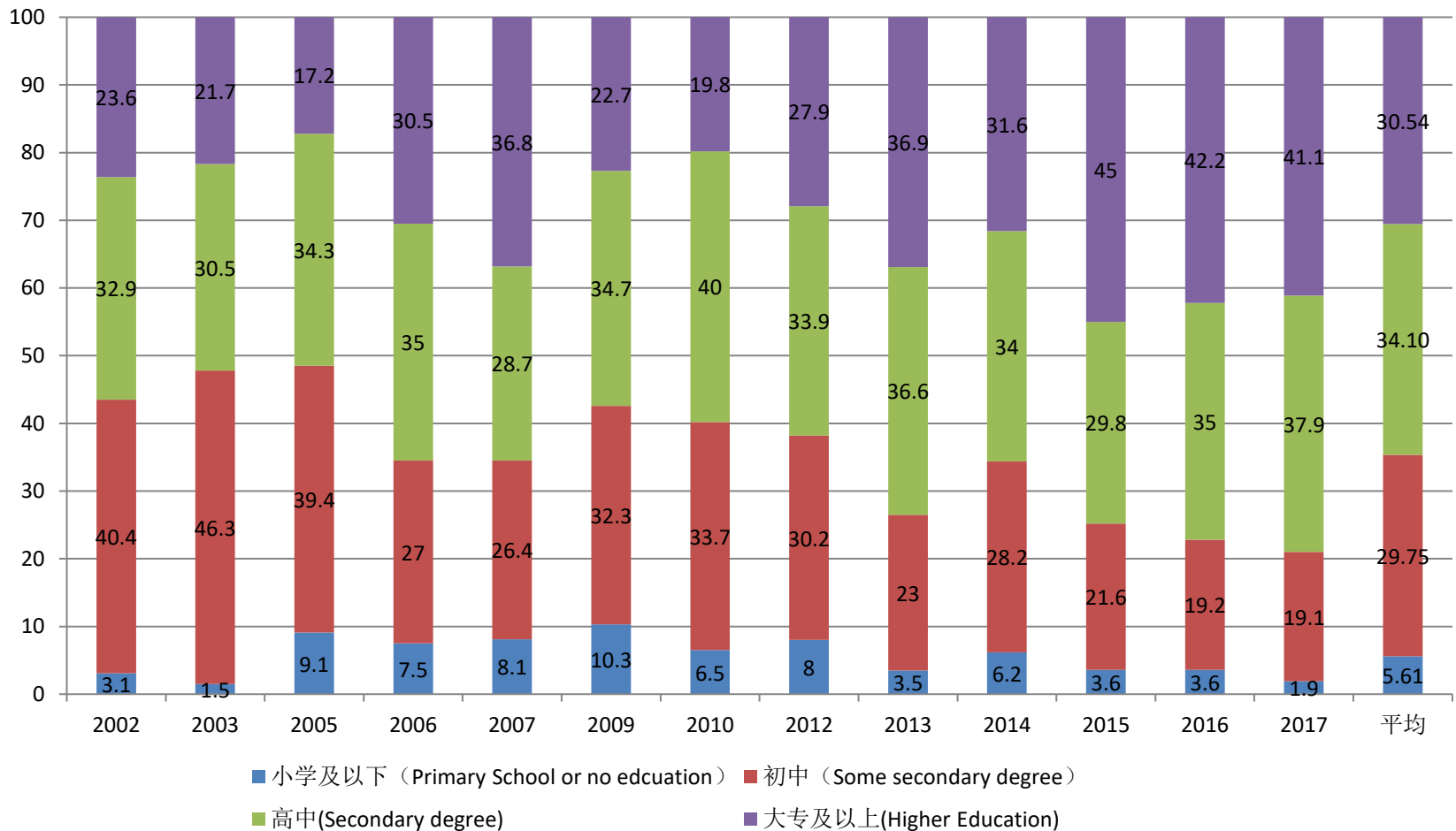
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4. 结构分析：受教育程度（中国创业者中高中学历占比最高）

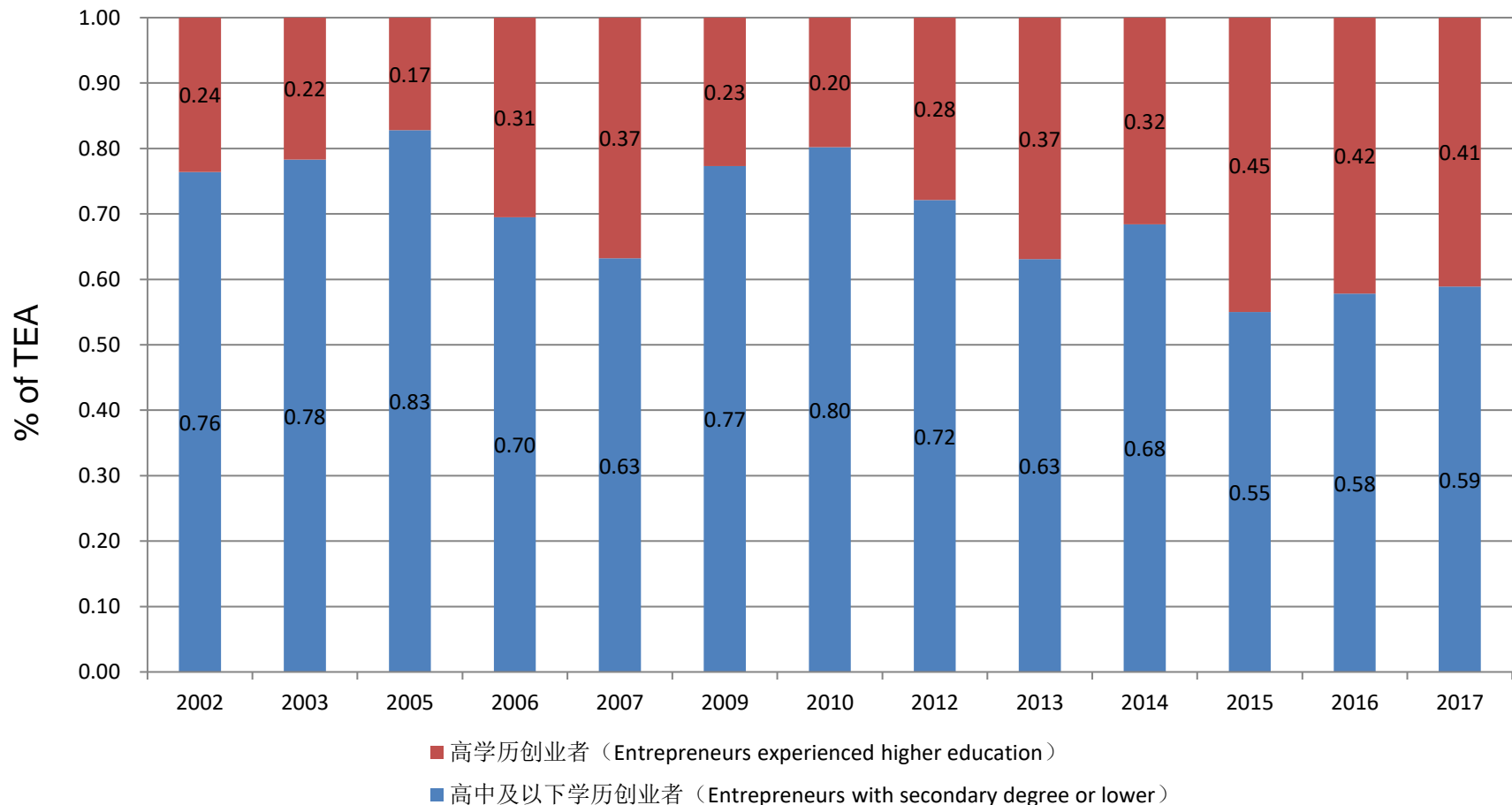
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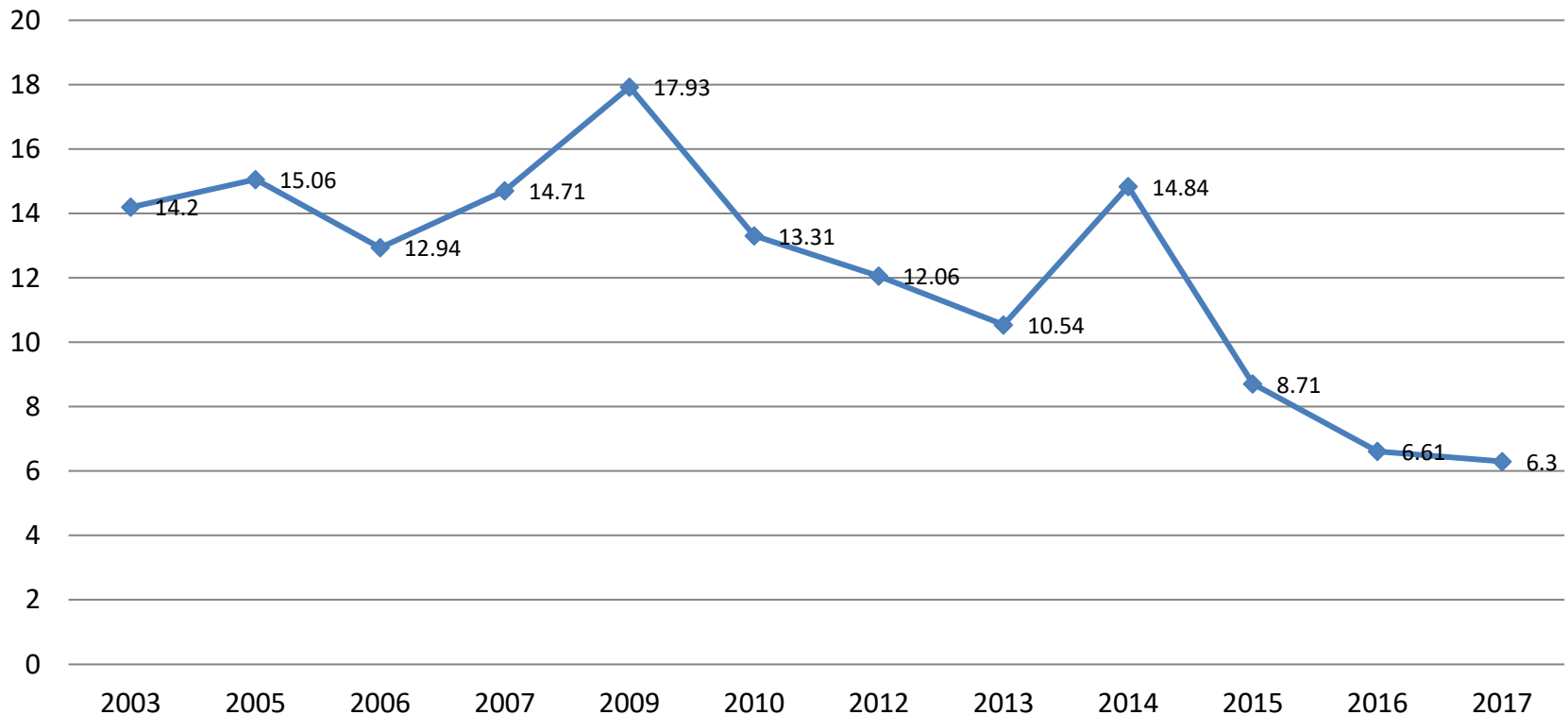
The educational attainment of entrepreneurs in China



4. 结构分析：受教育程度（低学历人口创业比例不断降低）

4. Structure analysis: Educational attainment (Fewer people with low educational attainment choose to start up from 2003 to 2017)

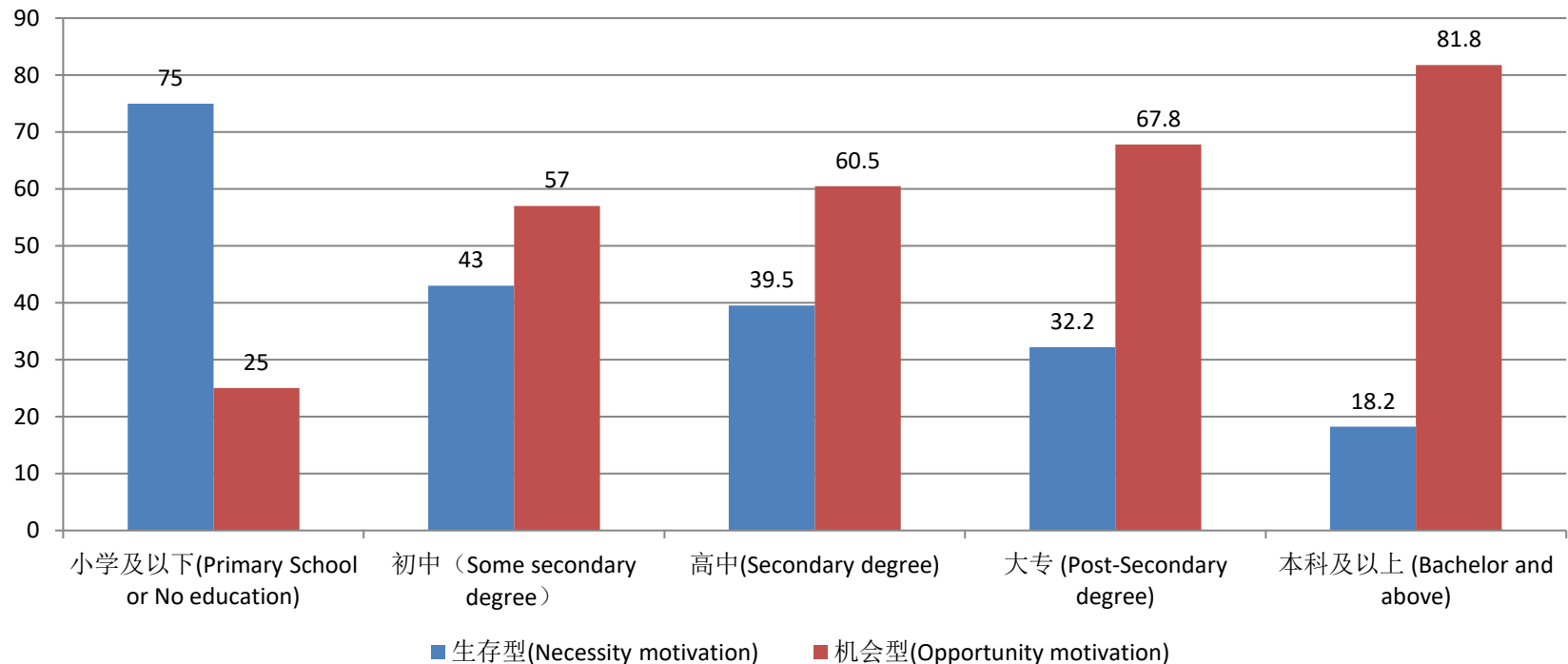
The percentage of adults with educational attainment of some secondary degree or lower start a business in China



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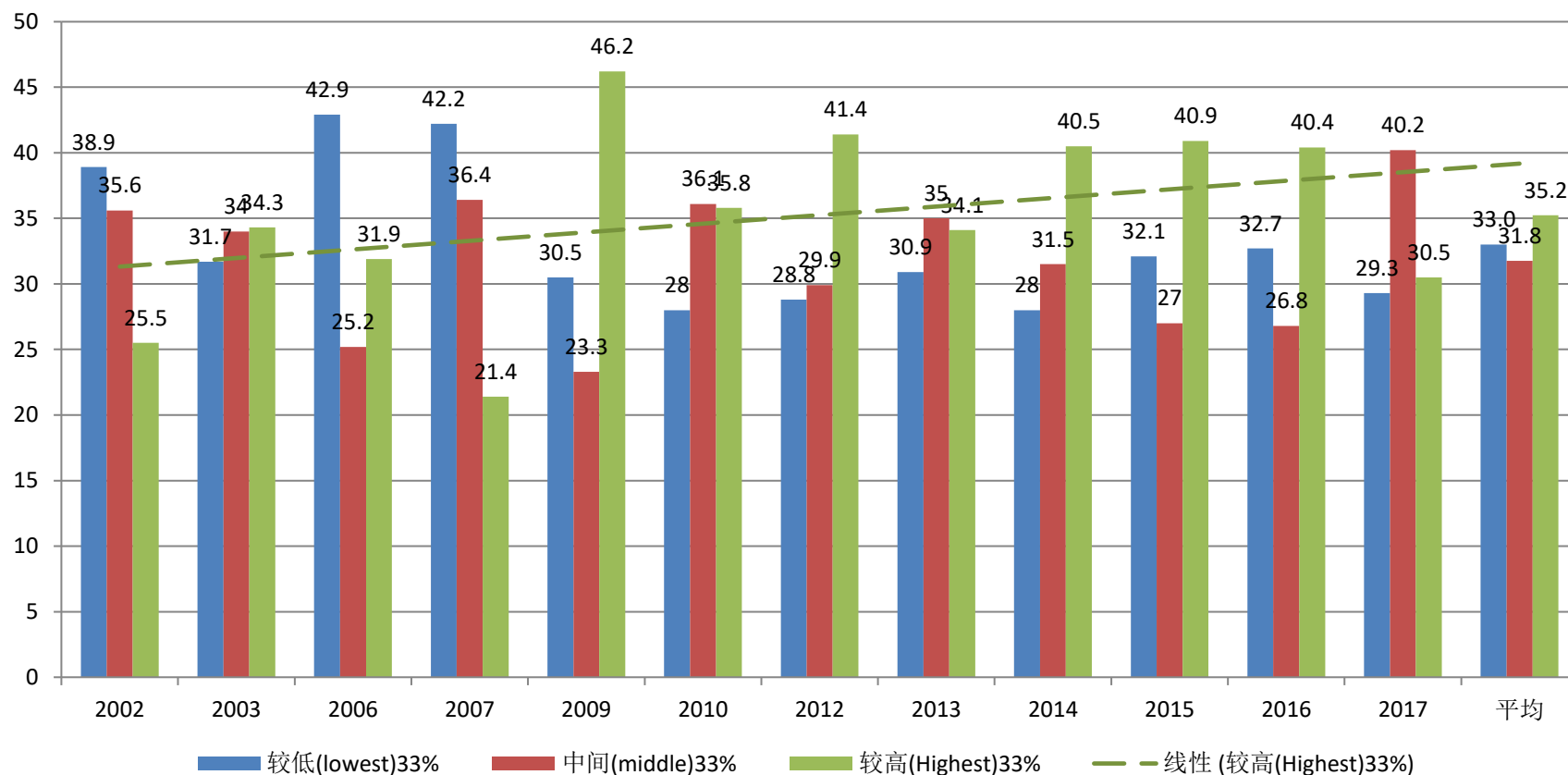
Entrepreneurs with different educational attainment and motivation in China (2017)



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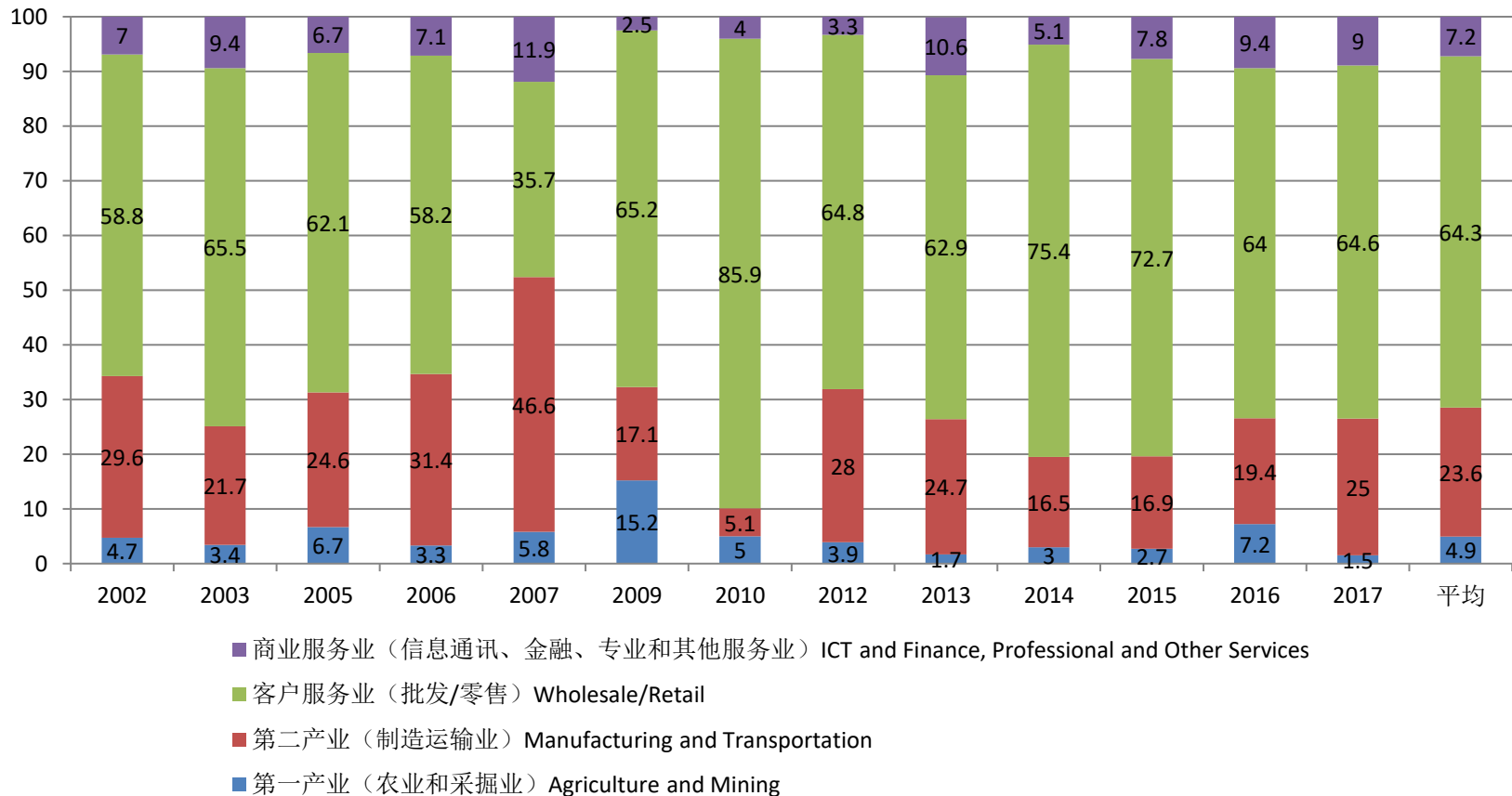
The income level of the entrepreneurs in China (Classified into 33% percentiles)



In 2017, the highest 33% of income level is classified as the total annual household income more than 100,000 Yuan.

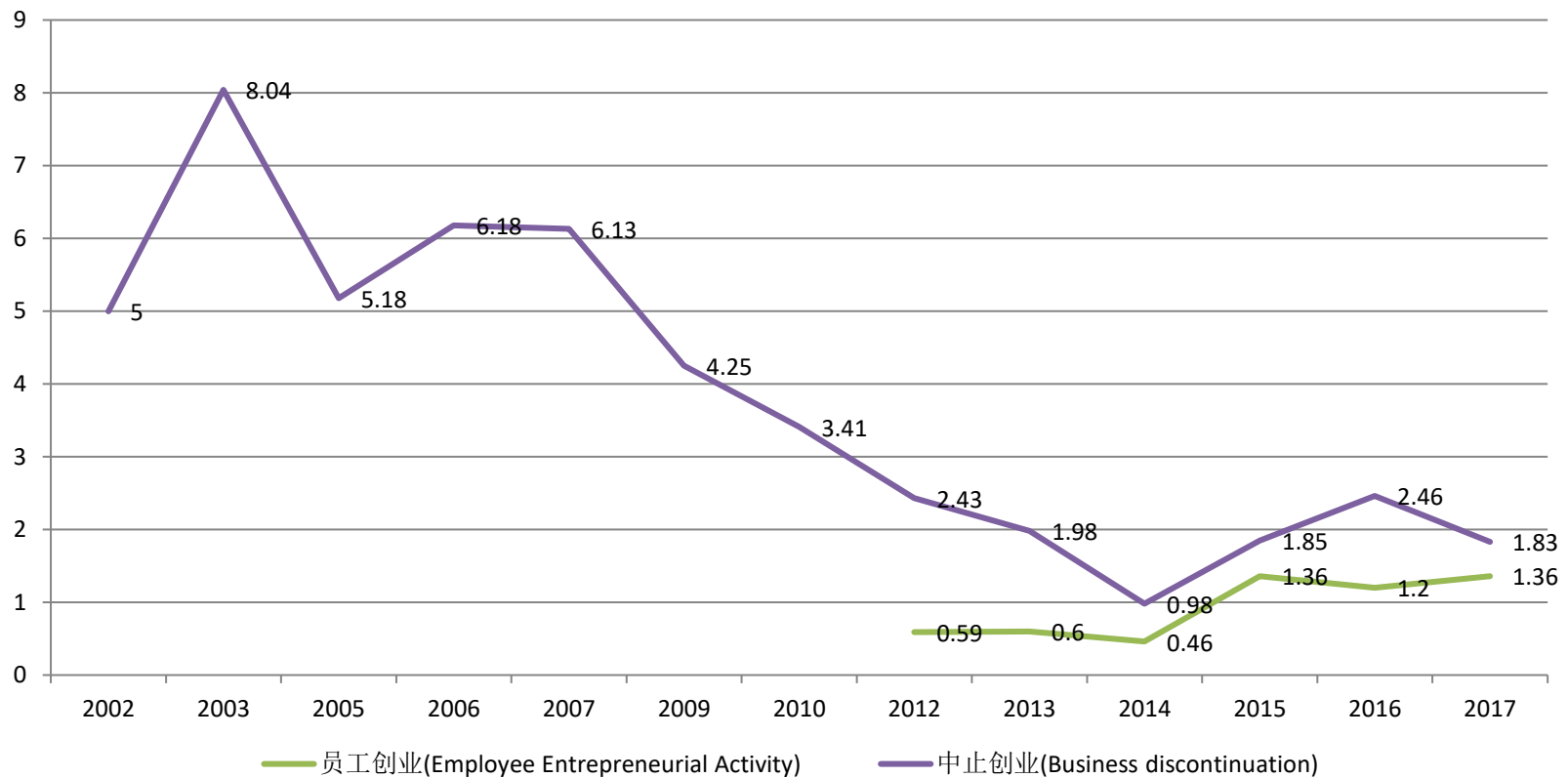
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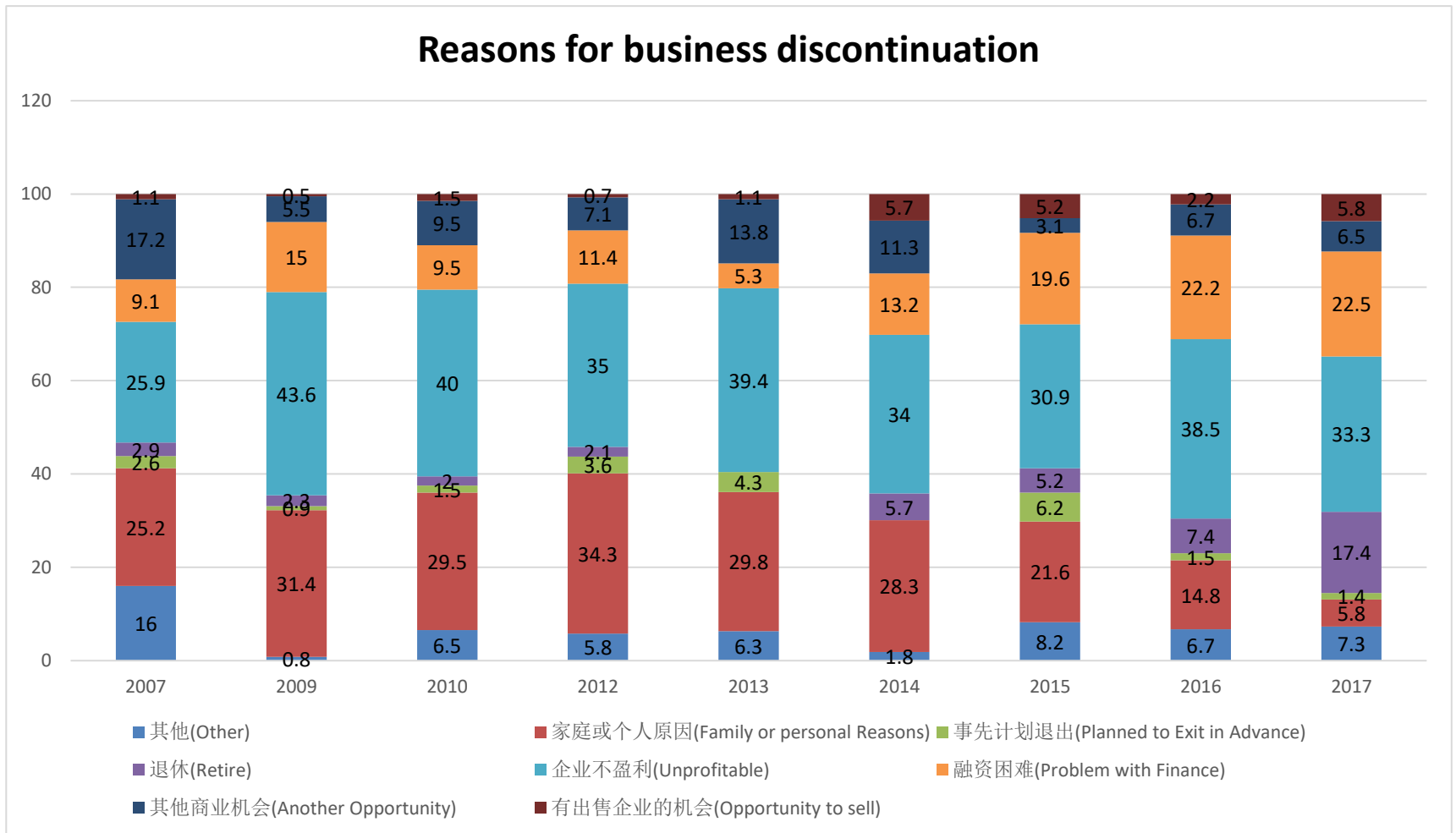
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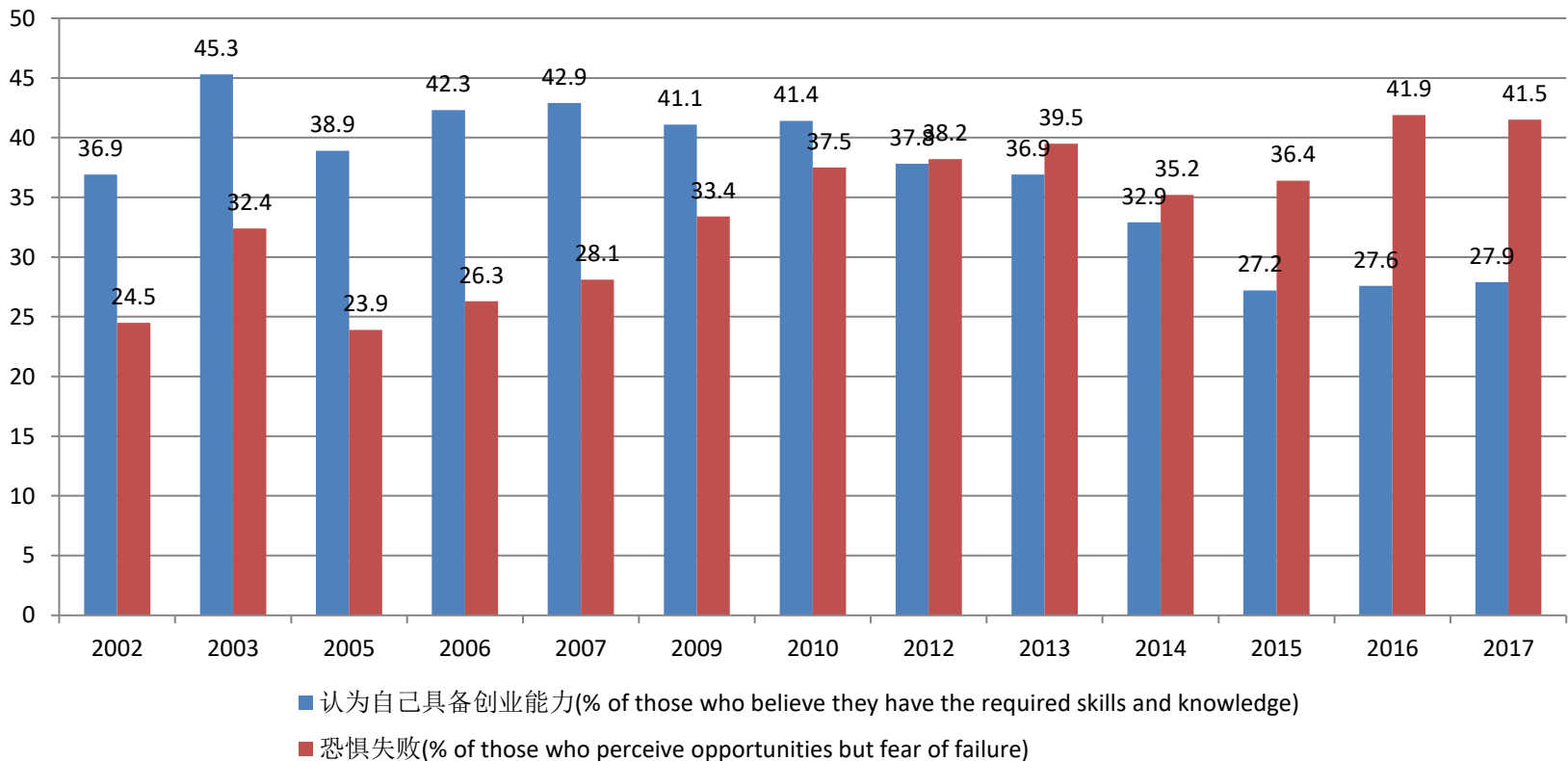
7. Structure analysis: Reasons for business discontinuation(Unprofitable is the major reason for business discontinuation in China)



8. 结构分析：创业能力的自我感知（认为自己具备创业能力的创业者比例不断下降，恐惧失败的比例逐步提高）

8. Structure analysis: Self-perceptions on entrepreneurship(Fewer people believe they have the required skills and knowledge to start up, while, more people fear of failure)

Self-perceptions on entrepreneurship



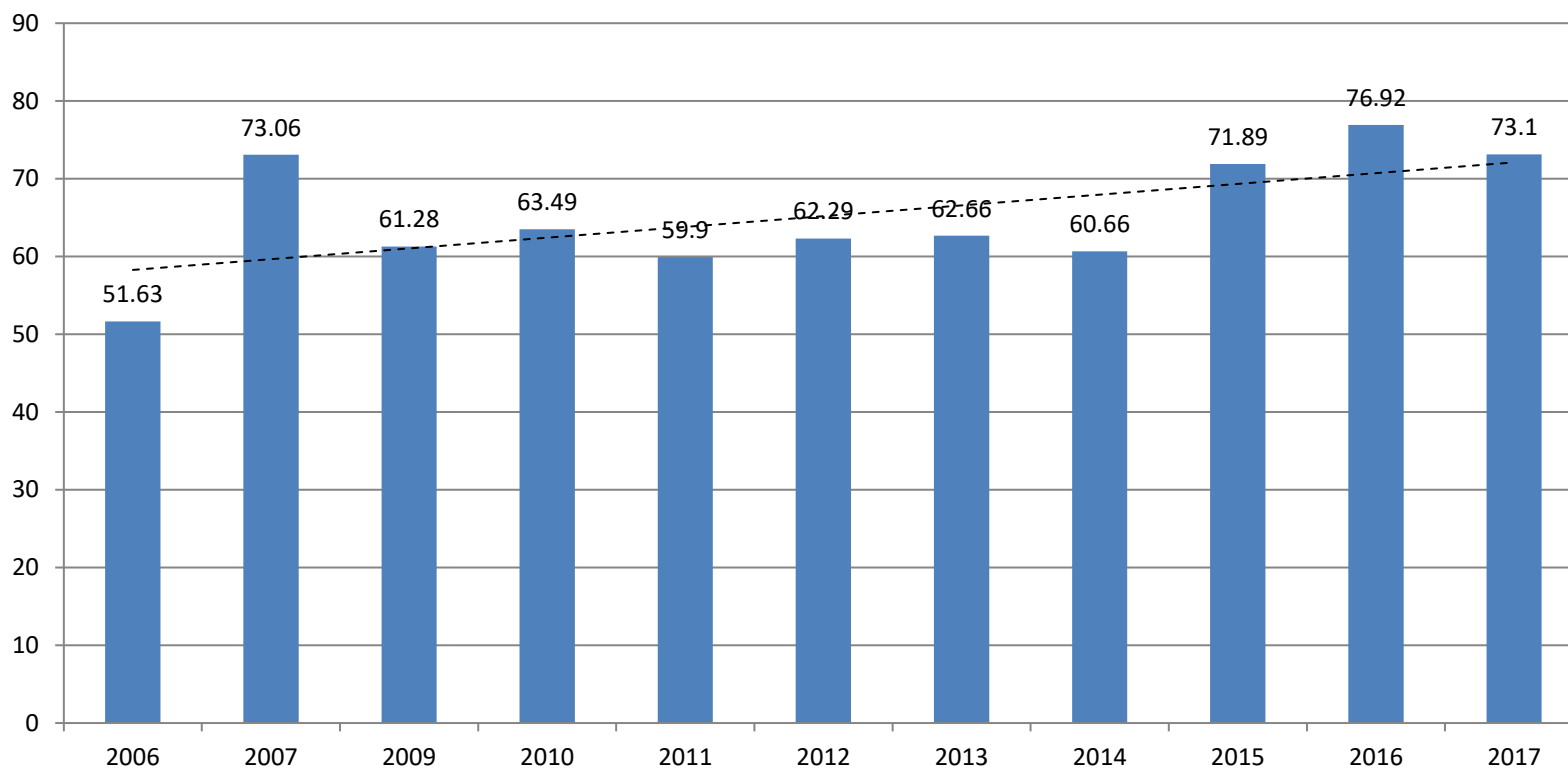
三、中国创业活动的质量

3. The quality of entrepreneurship in China

产品新颖性逐步提高

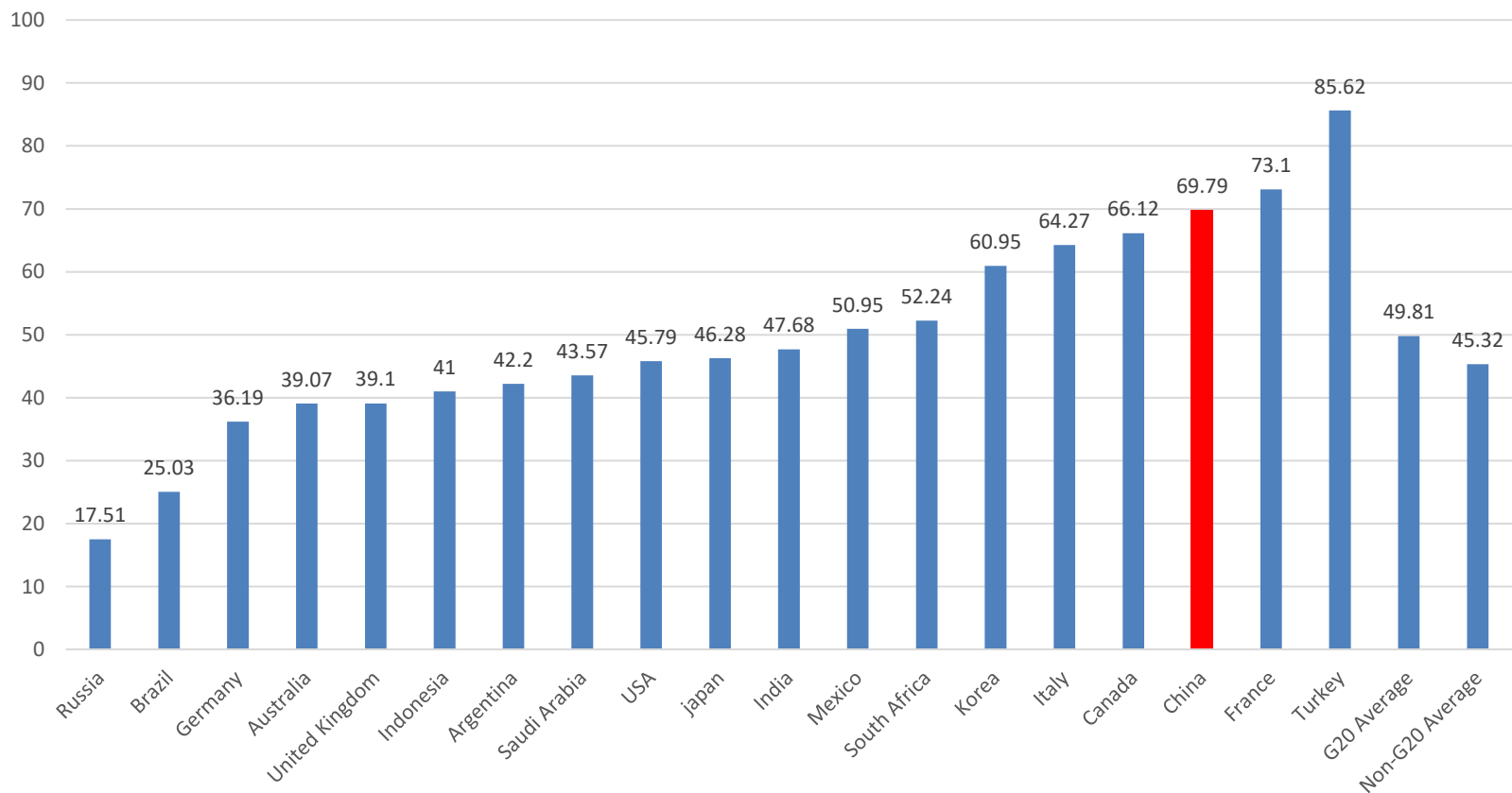
The percentage of novel products/services is increasing

All or some of the customers consider the product/service is new in the market



与G20经济体相比，中国创业企业的产品新颖性较好
The percentage of novel products/services of the start up companies in China is relatively high compared to G20 economies

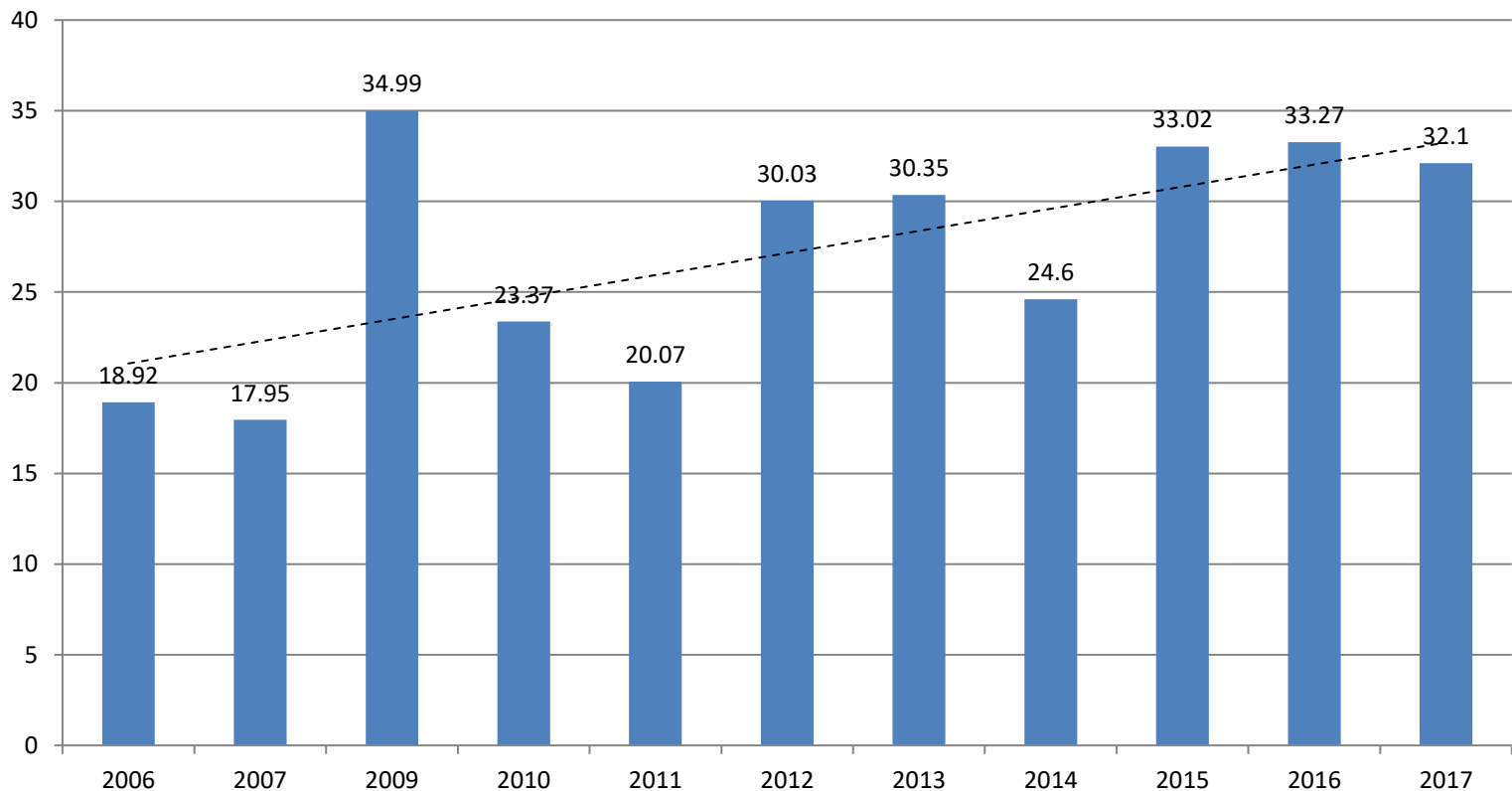
All or some of the customers consider the product/service is new in the market



新市场开发能力逐步上升

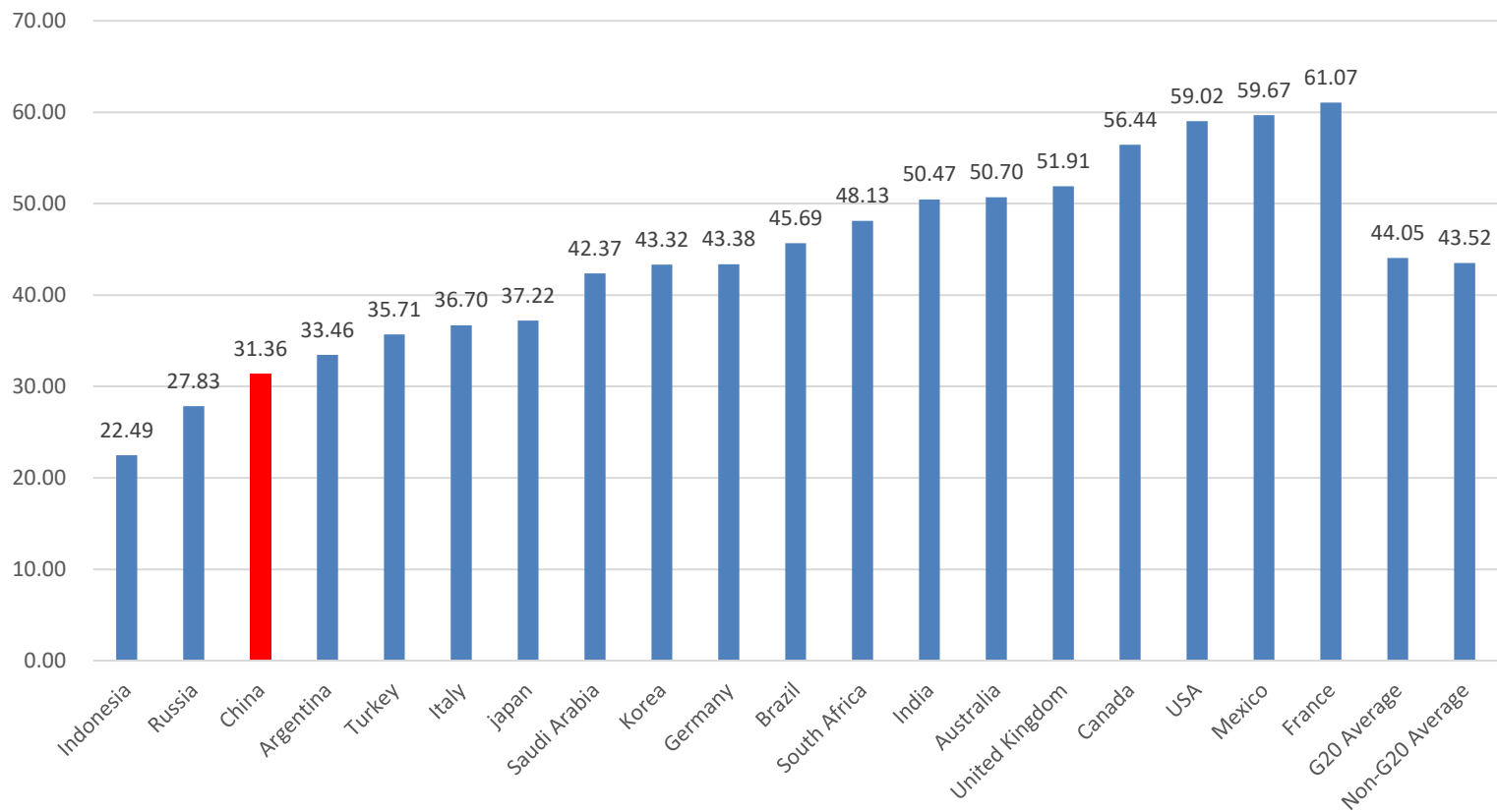
The capability of new market development is improving

Few or no competitor offer the same products/ services in the market



与G20经济体相比，中国创业企业的新市场开发能力较弱
The capability of new market development of start up companies in
China is relatively weak among G20 economies

**Few or no competitor offer the same products/ services in
the market**

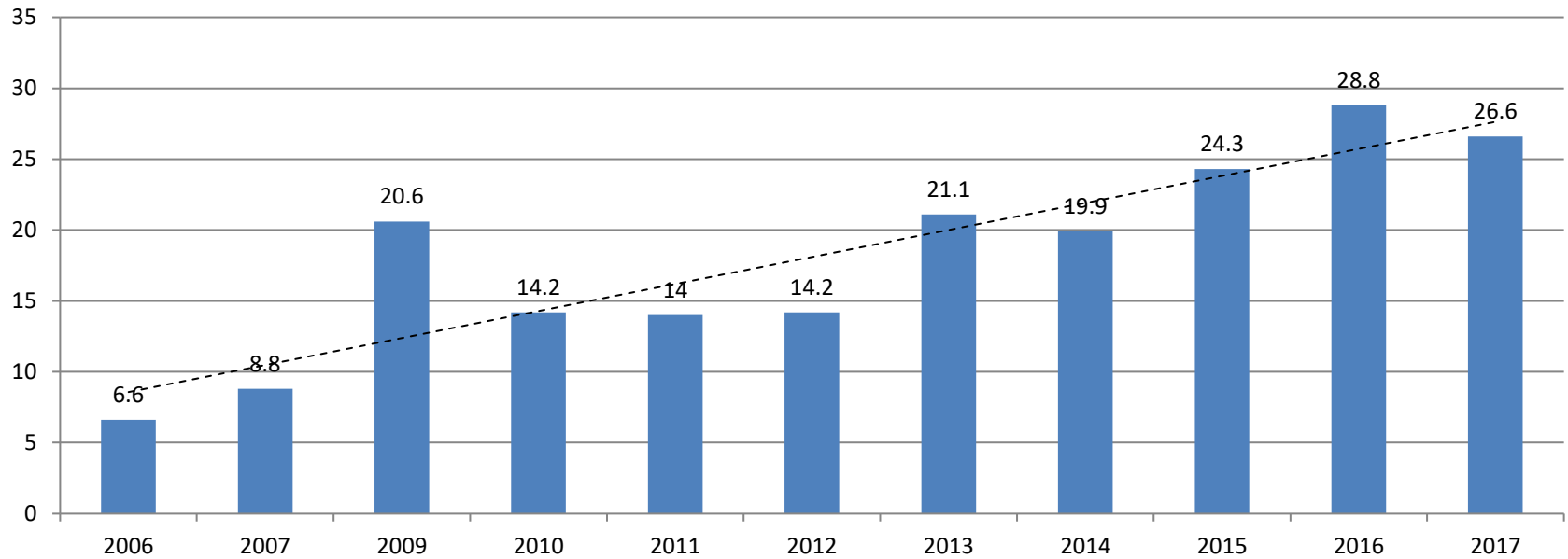


创业企业的创新能力显著提高

The innovation capabilities of start up companies are boosted

(Innovation - Product is new to all or some customers **AND** few/no businesses offer the same product)

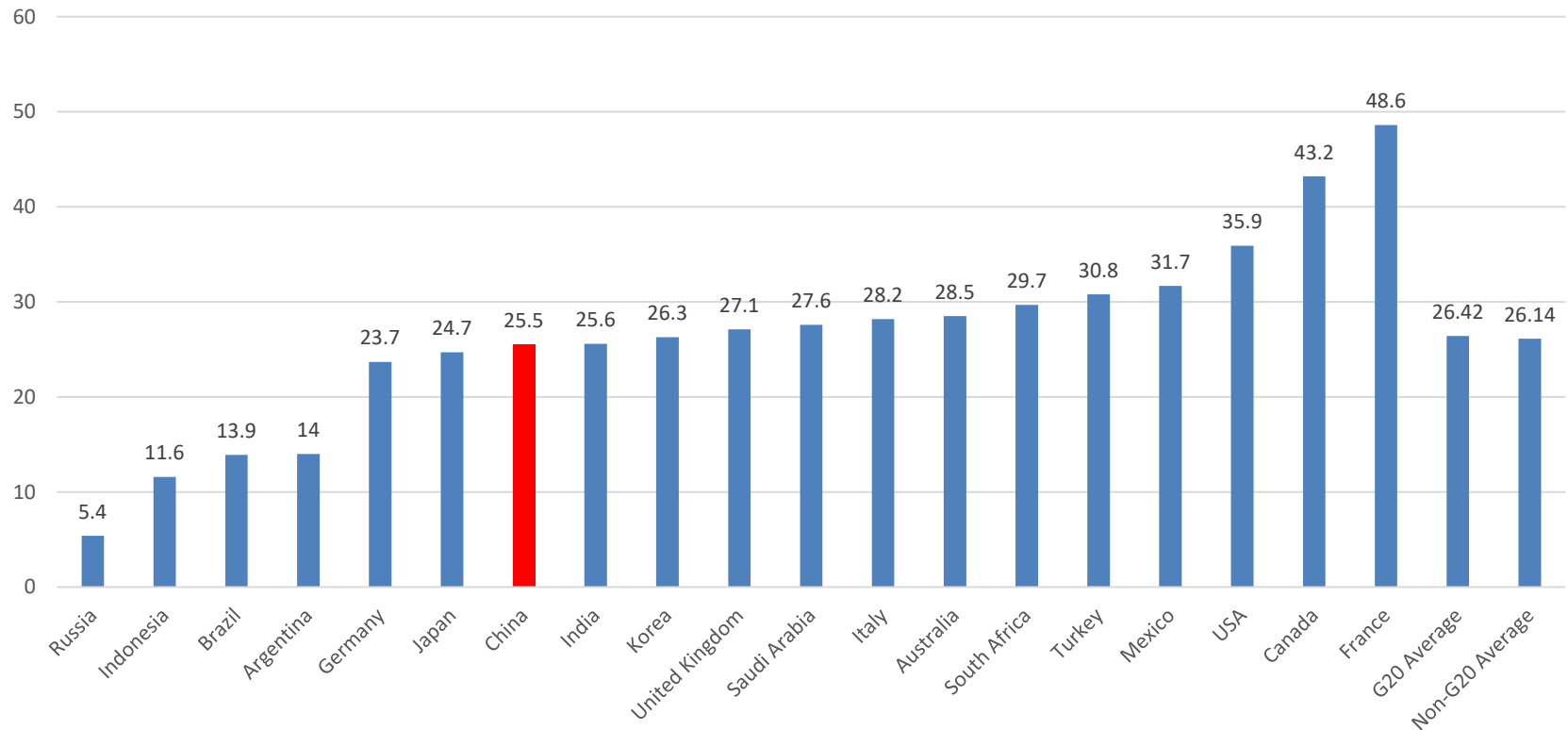
The index of innovation capabilities of start up companies



与G20经济体相比，中国创业企业的创新能力依旧较弱
The innovation capabilities of start up companies in China are relatively weak compared with its G20 counterparts

(Innovation - Product is new to all or some customers **AND** few/no businesses offer the same product)

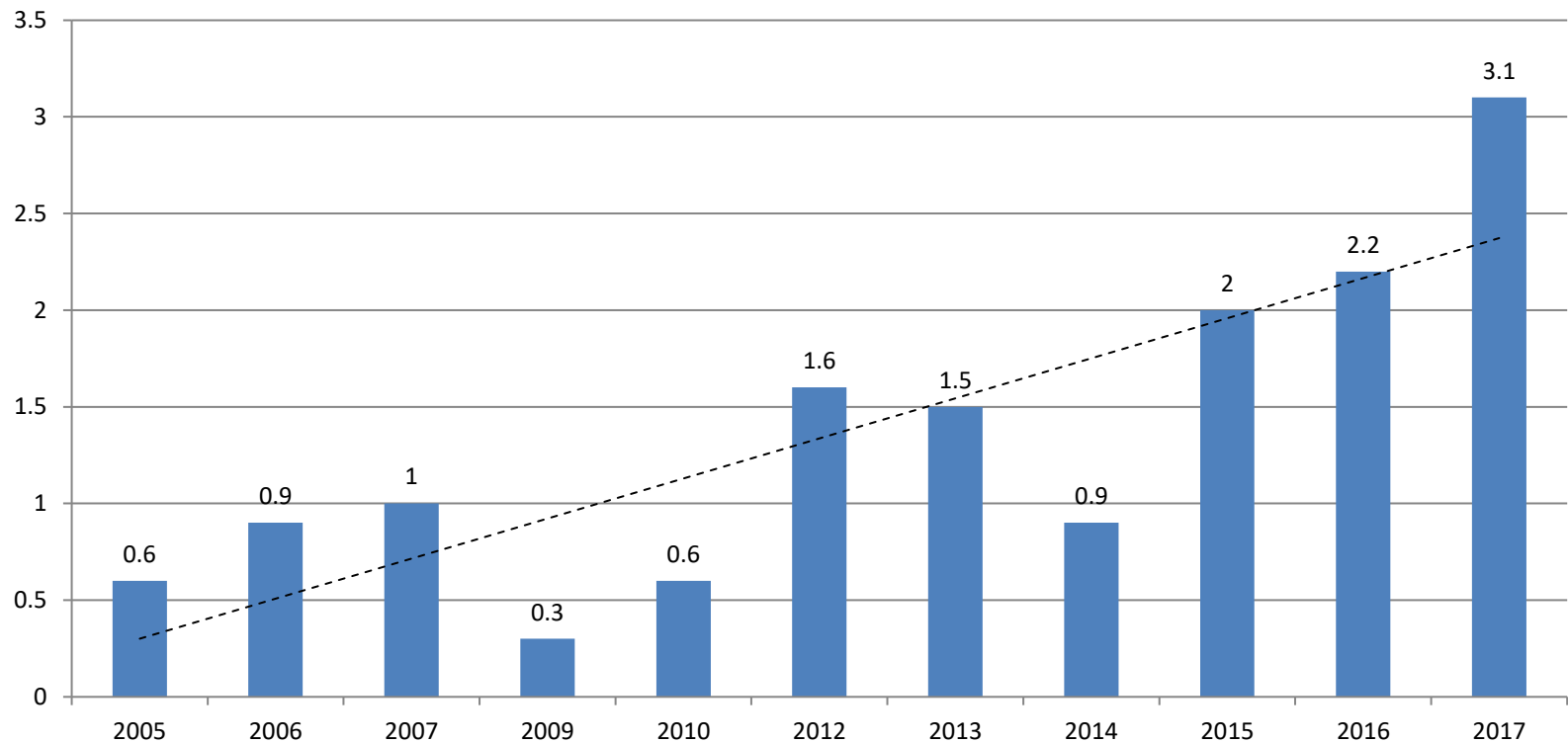
The index of innovation capabilities of start up companies



高技术产业创业比例不断上升

The percentage of high-tech entrepreneurship is increasing
(High-tech industry are classified according to the OECD industry classifications)

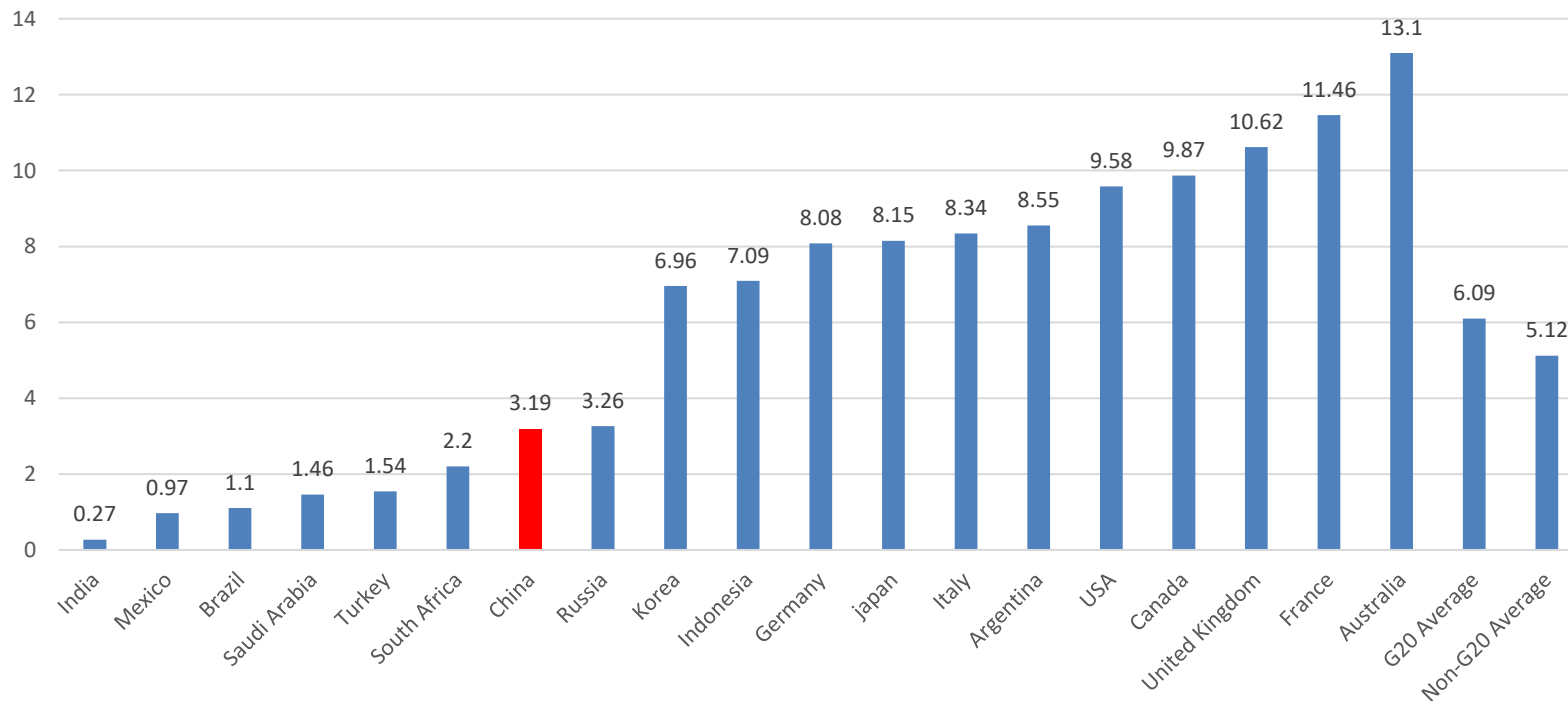
The percentage of start up companies classified in medium or high-tech industry



与G20经济体相比，中国高技术产业创业比例依旧较低

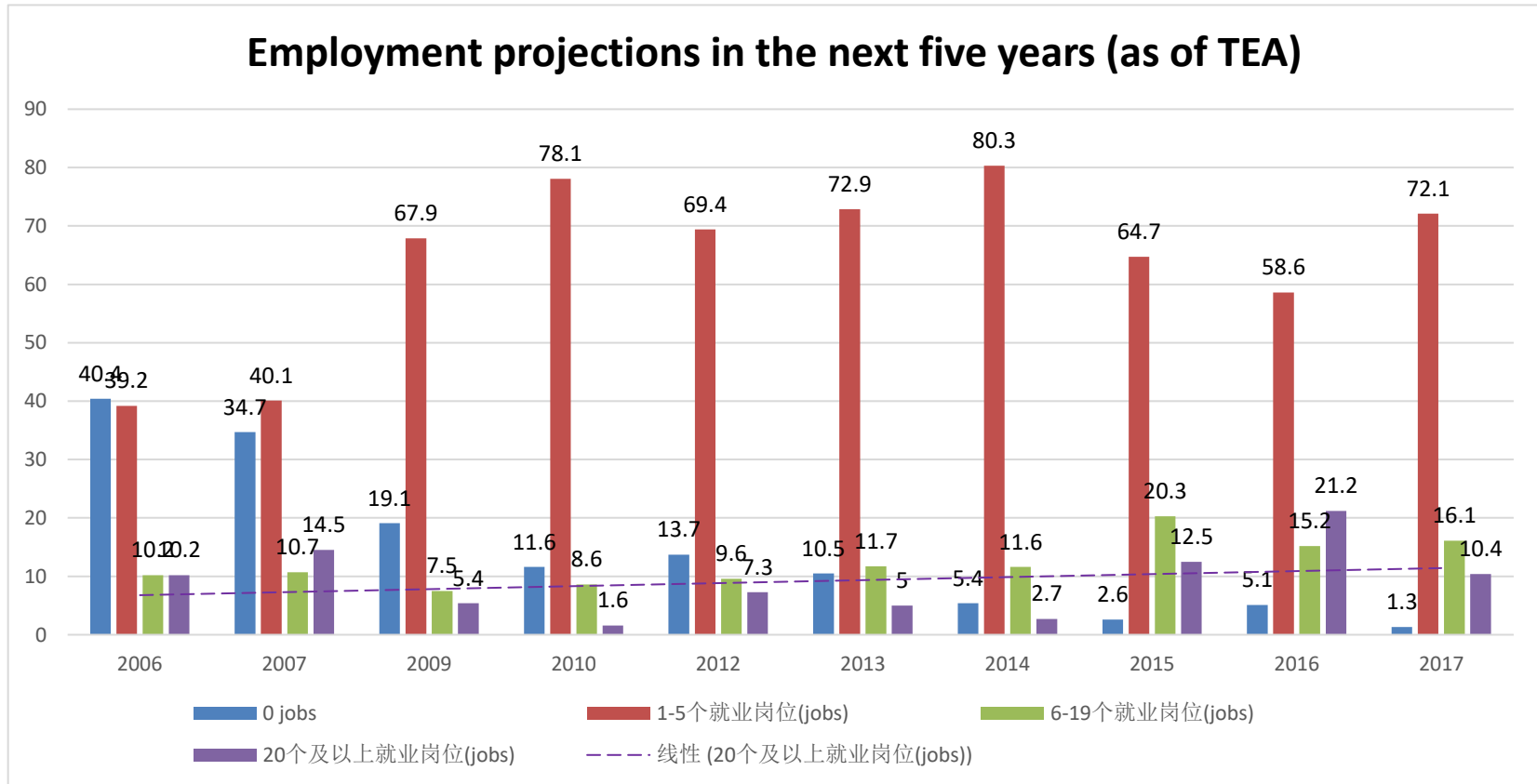
The percentage of high-tech entrepreneurship of China is still relatively low compared to other G20 members, especially the developed economies

The percentage of start up companies classified in medium or high-tech industry



创造就业岗位能力不断提升

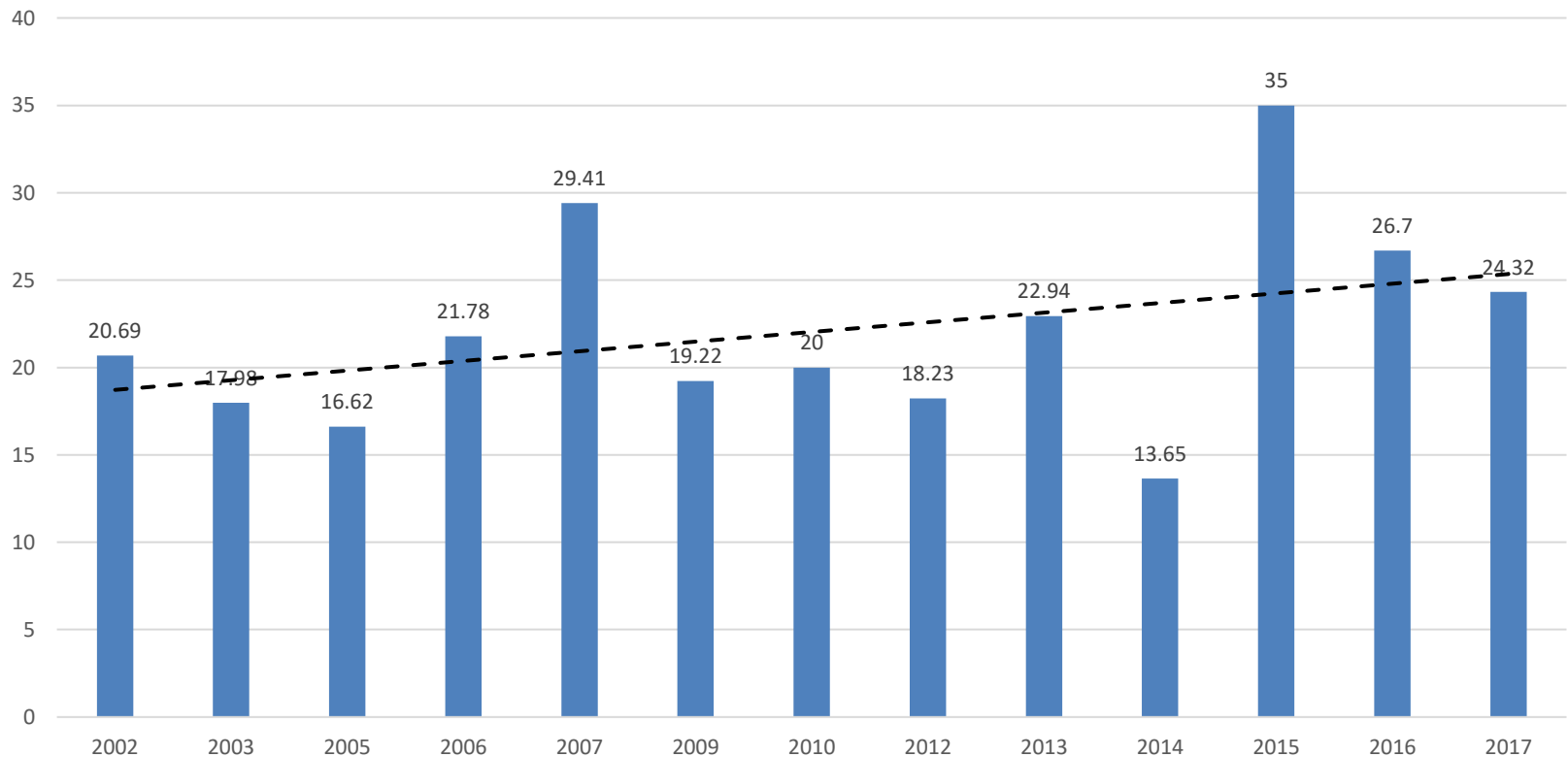
The capability of job creation is rising



高成长企业比例逐步上升

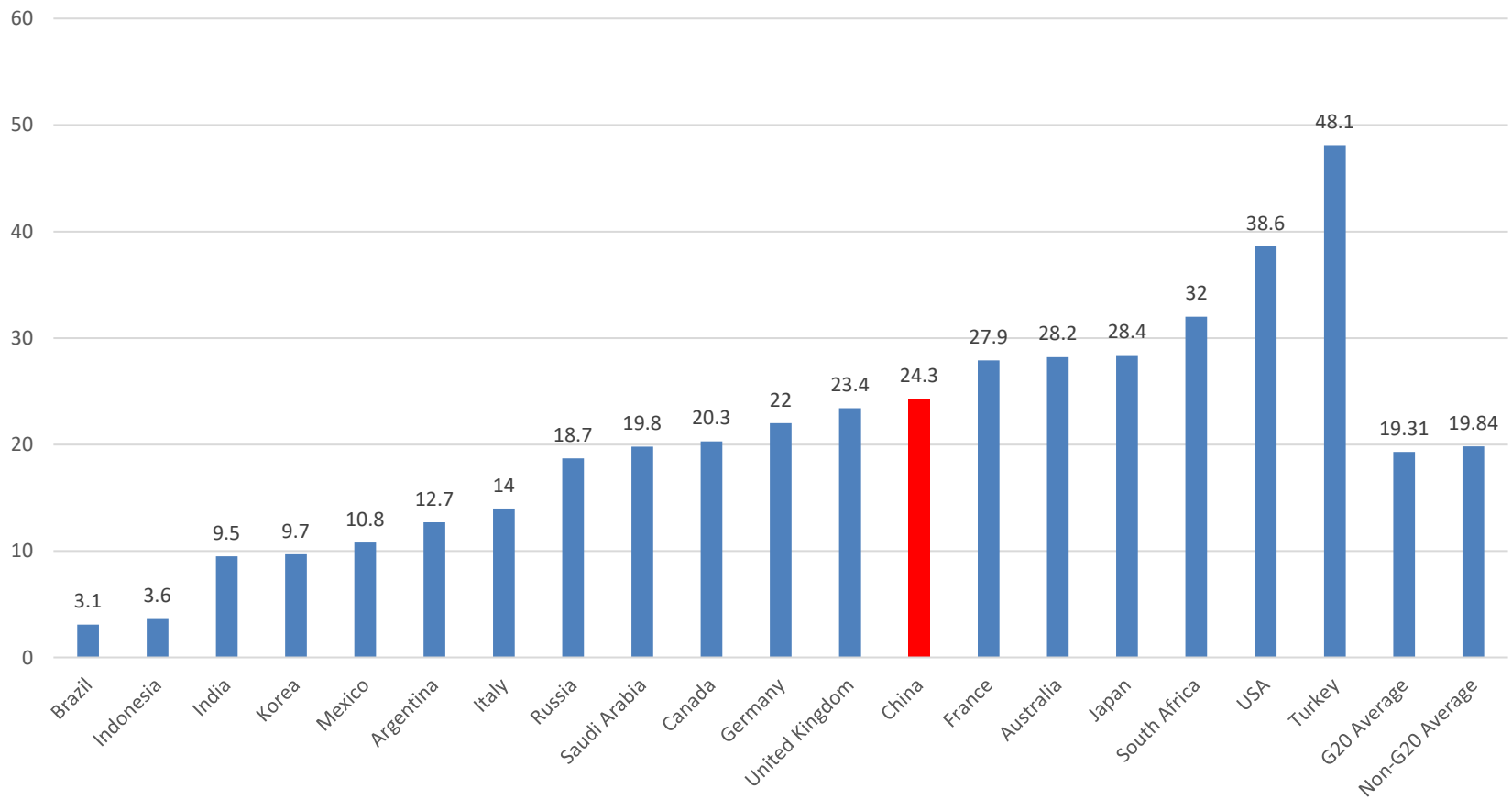
The percentage of high growth companies is increasing

Percentage of those involved in TEA who expect to create 6 or more jobs in 5 years



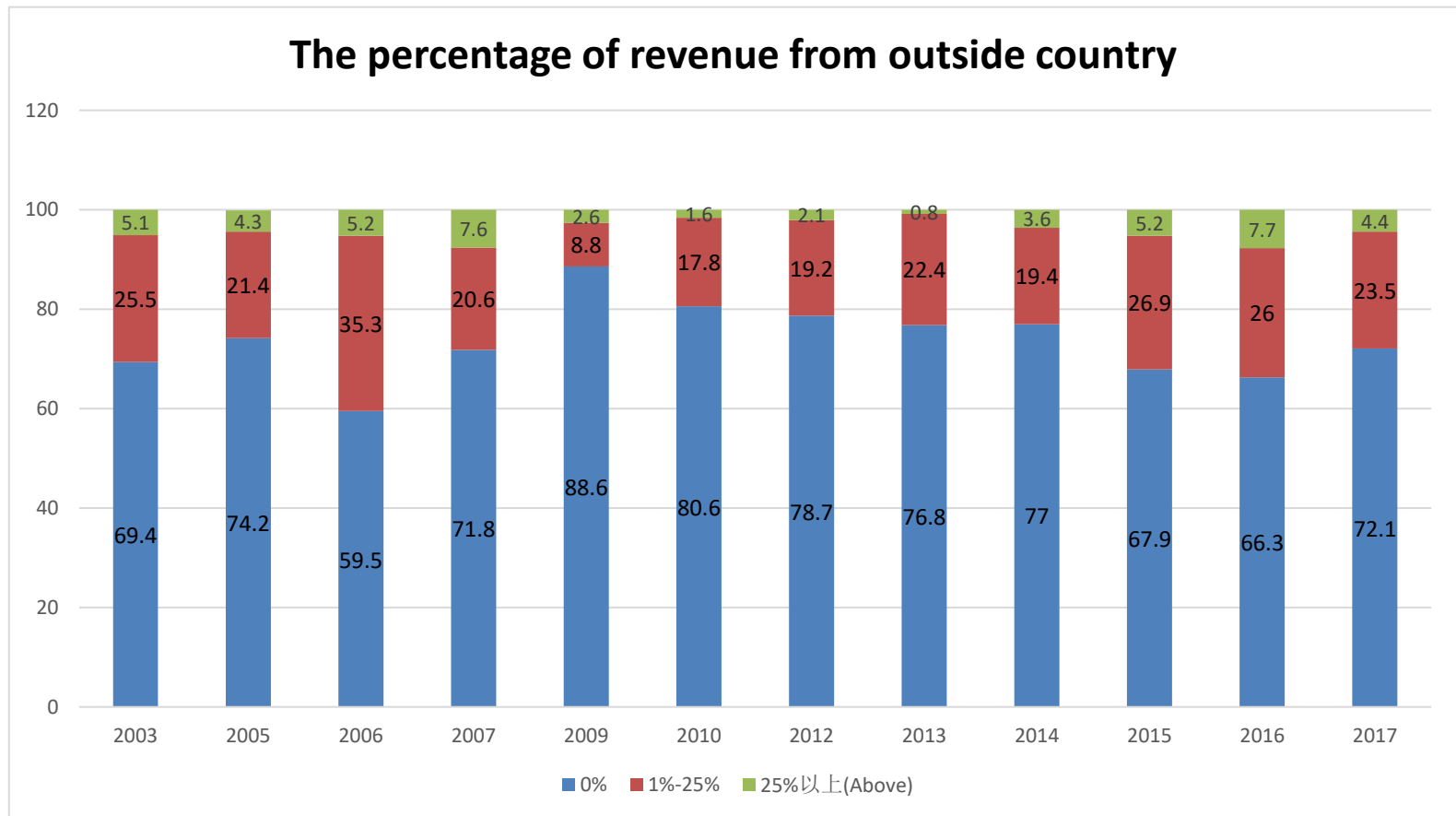
与G20经济体相比，中国高成长企业比例处于中上水平
The percentage of high growth start up companies in China ranked
above the average of G20 economies

Percentage of those involved in TEA who expect to create 6 or
more jobs in 5 years



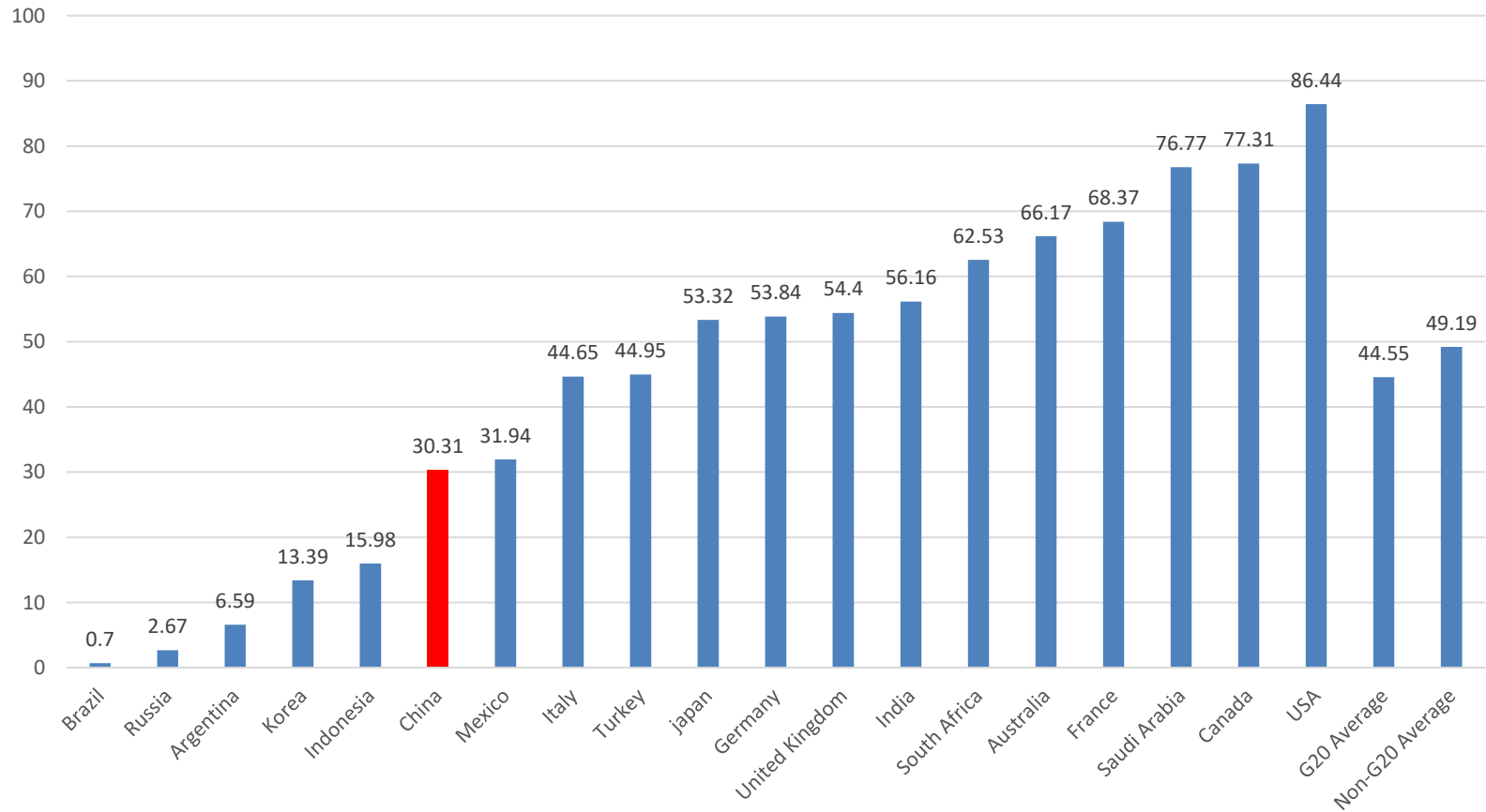
近三成创业企业拥有海外客户

Approximately 30% of start up companies have foreign customers



与G20经济体相比，中国具有国际导向的创业企业比例较低
The percentage of international oriented start up companies in China is relatively low compared to its G20 counterparts

The percentage of start up companies have customers abroad



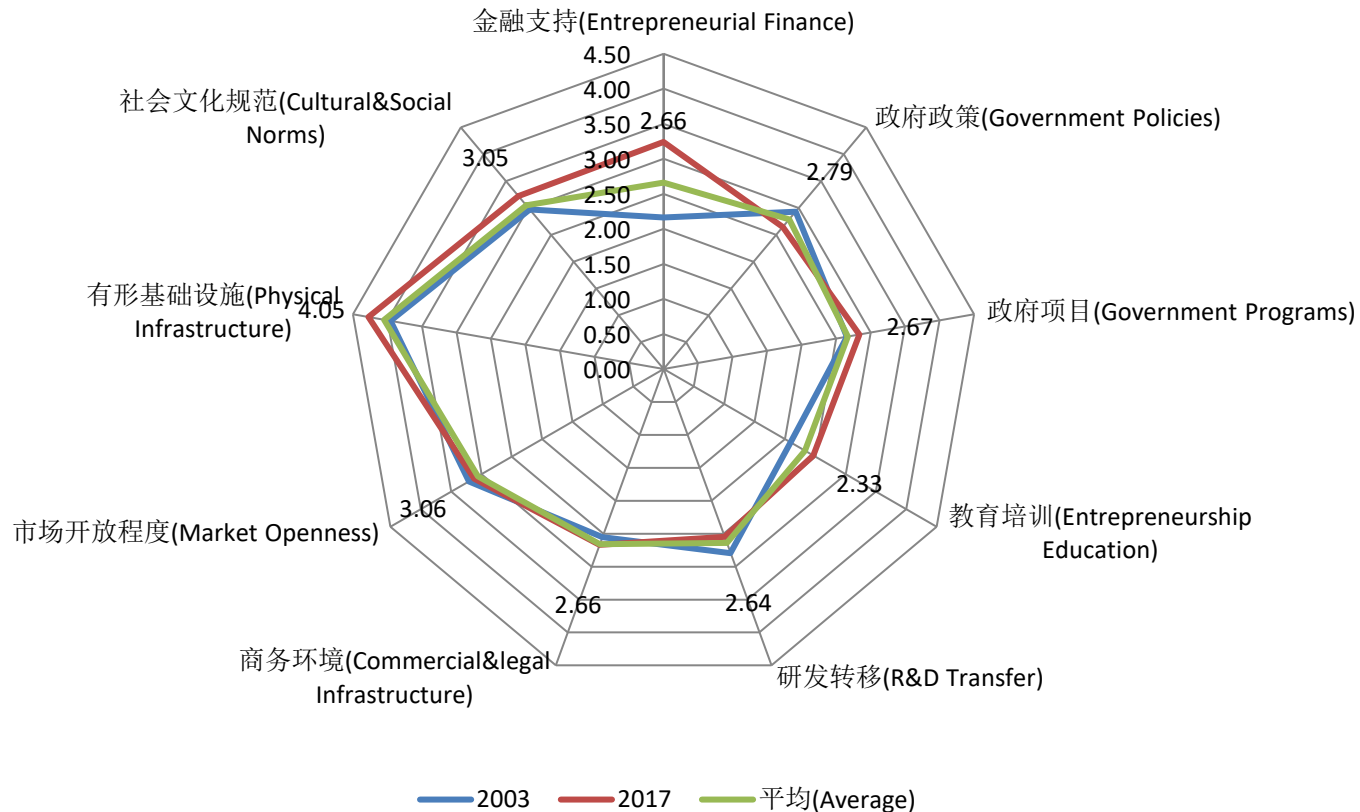
四、中国创业环境

4. The entrepreneurial ecosystem in China

中国创业环境的变化

(金融支持改善明显, 研发转移和政府政策亟需改善)

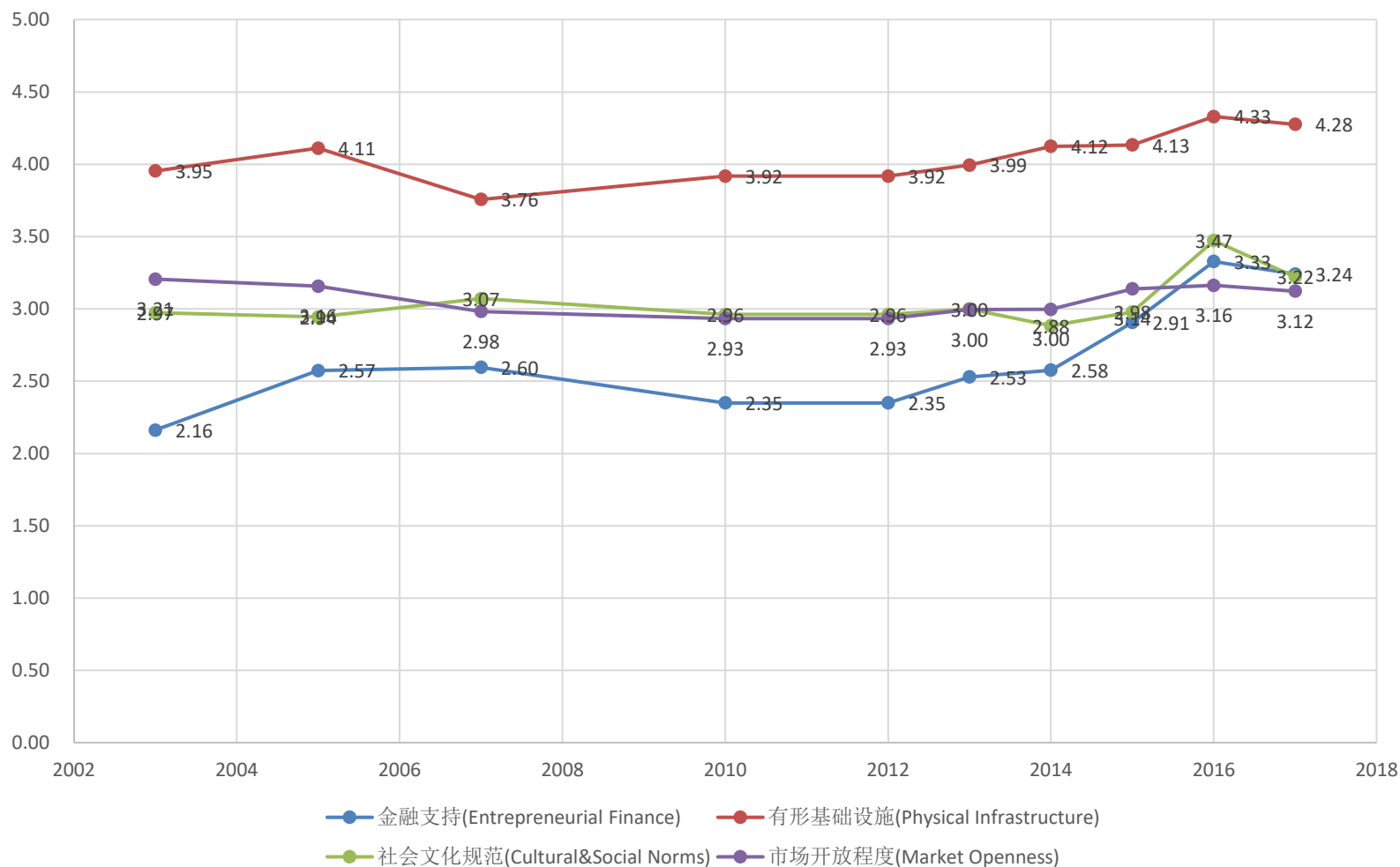
The changes of the entrepreneurial ecosystem in China (The entrepreneurship finance has been improved significantly, however, the R&D transfer and government policies still need further development)



表现较好的创业环境条件

（有形基础设施是中国创业环境最好的一环，金融支持的评价不断提高）

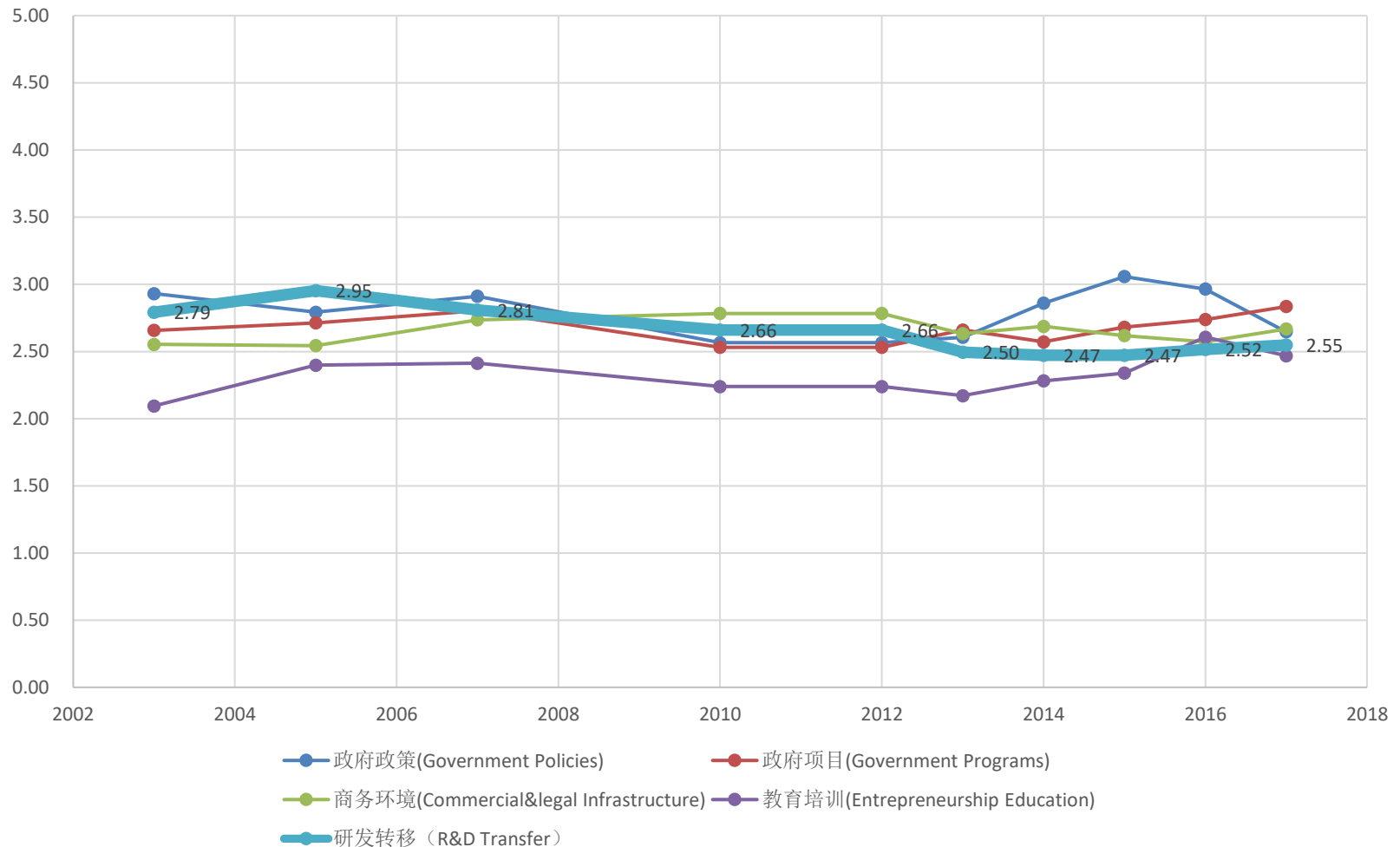
The better performed entrepreneurial framework conditions in the ecosystem （Physical infrastructure is the best aspect of the entrepreneurial ecosystem in China , while, the assessment of entrepreneurial finance has been improved gradually）



表现较弱的创业环境条件

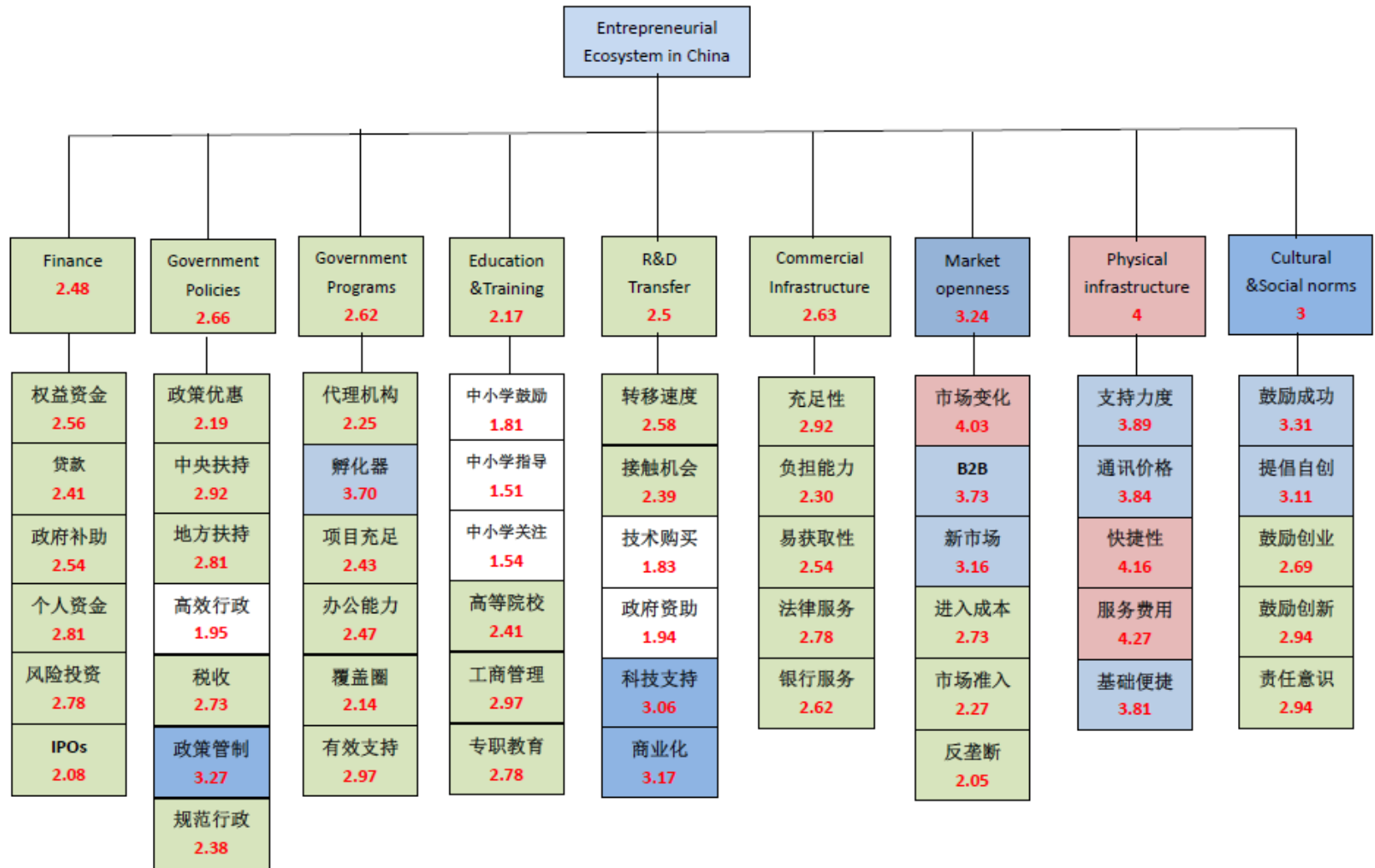
（创业教育与培训是中国创业环境最弱的一环，研发转移的评价不断降低）

The underperformed entrepreneurial framework conditions in the ecosystem （Entrepreneurial education and training is the weakest aspect of the entrepreneurial ecosystem in China , while, the assessment of R&D transfer is decreasing in last 15 years）



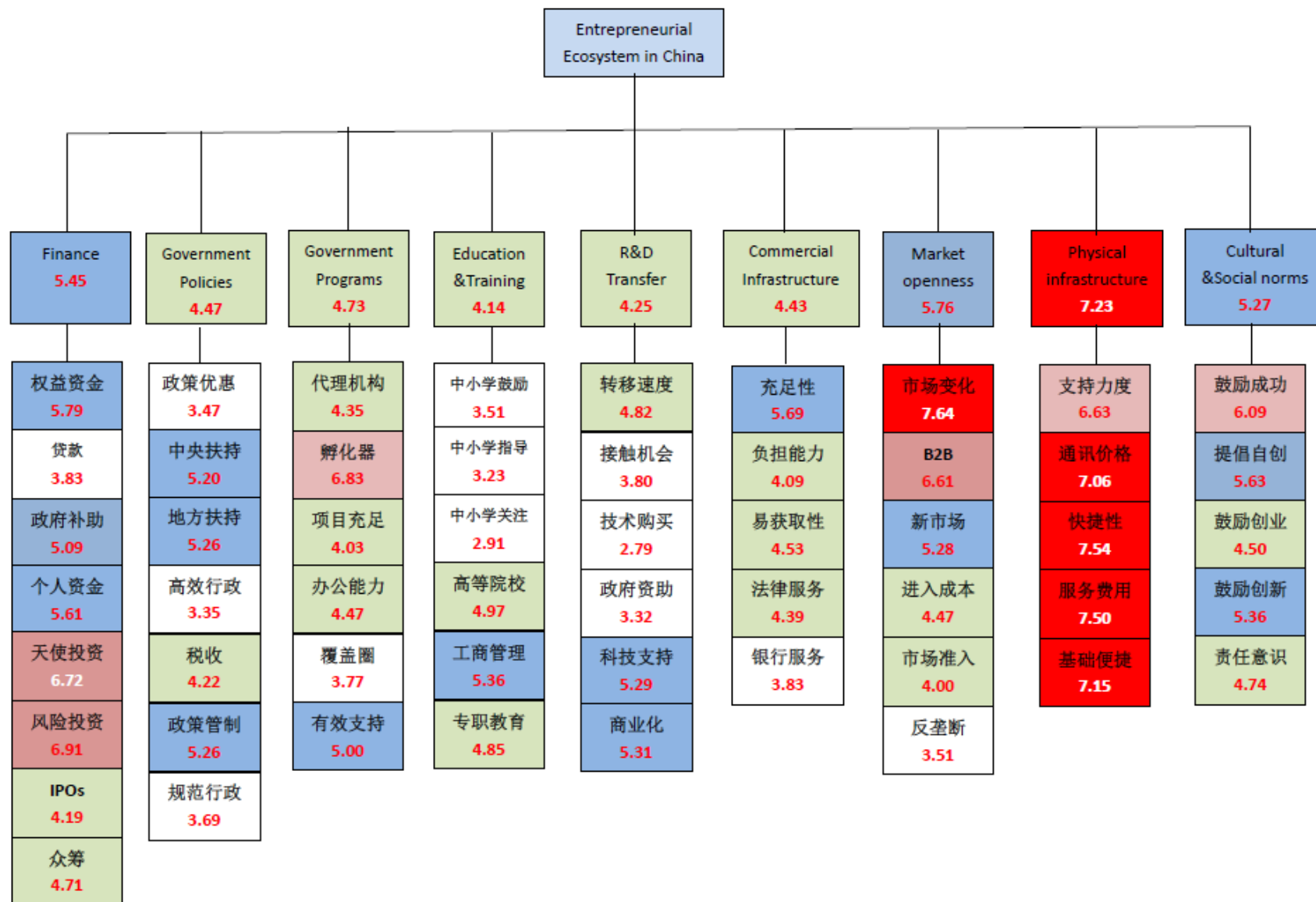
2012-2013中国创业生态环境图解

The entrepreneurial ecosystem in China 2012-2013



2017-2018中国创业生态环境图解

The entrepreneurial ecosystem in China 2017-2018



五、中国创业活动的区域差异

5. The regional disparities of entrepreneurial activities in China

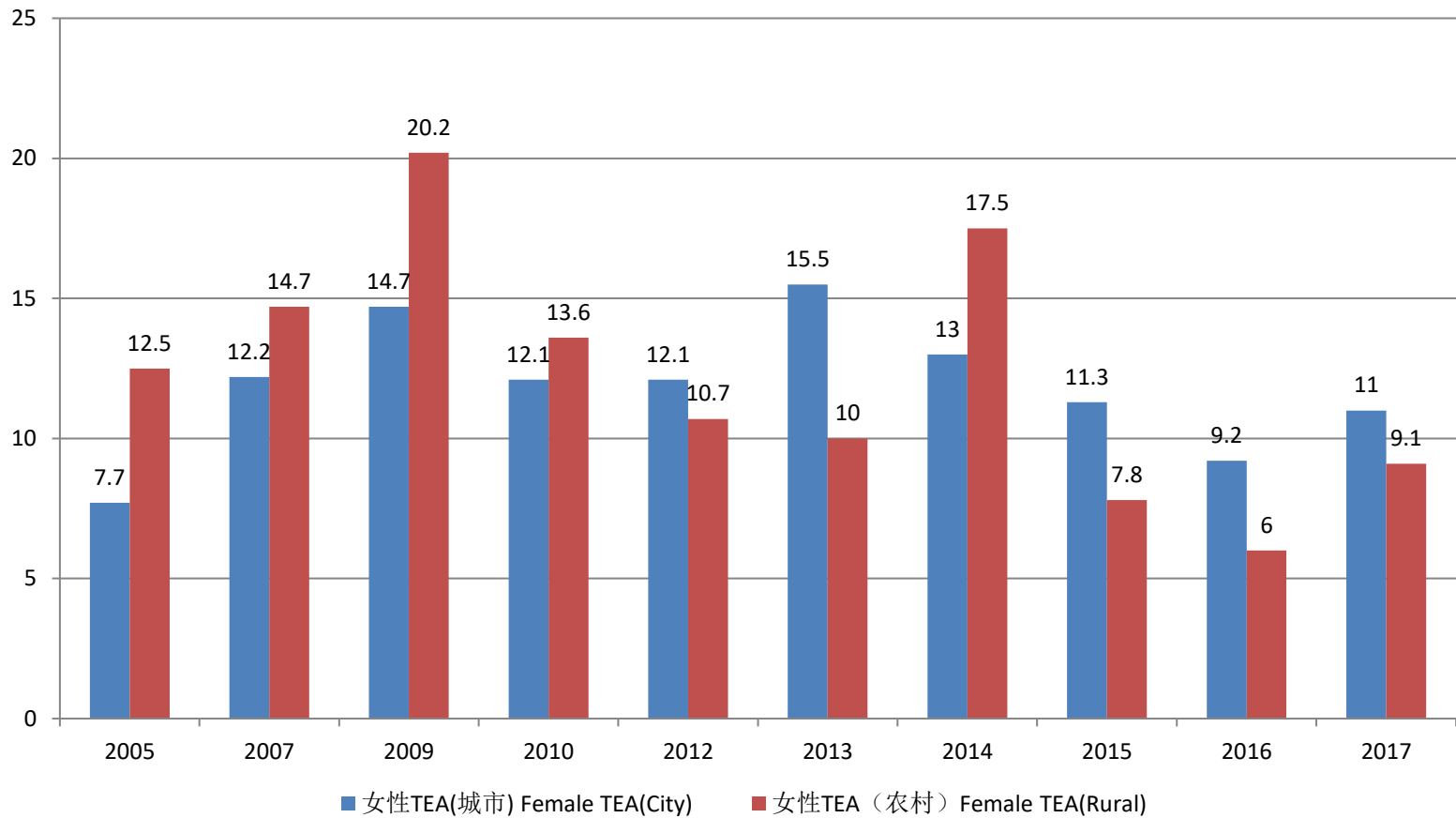
城乡差异（城市创业逐渐活跃且机会型创业比例更高）

The differences between cities and rural area (Entrepreneurship in cities are getting more active and more opportunity-based)

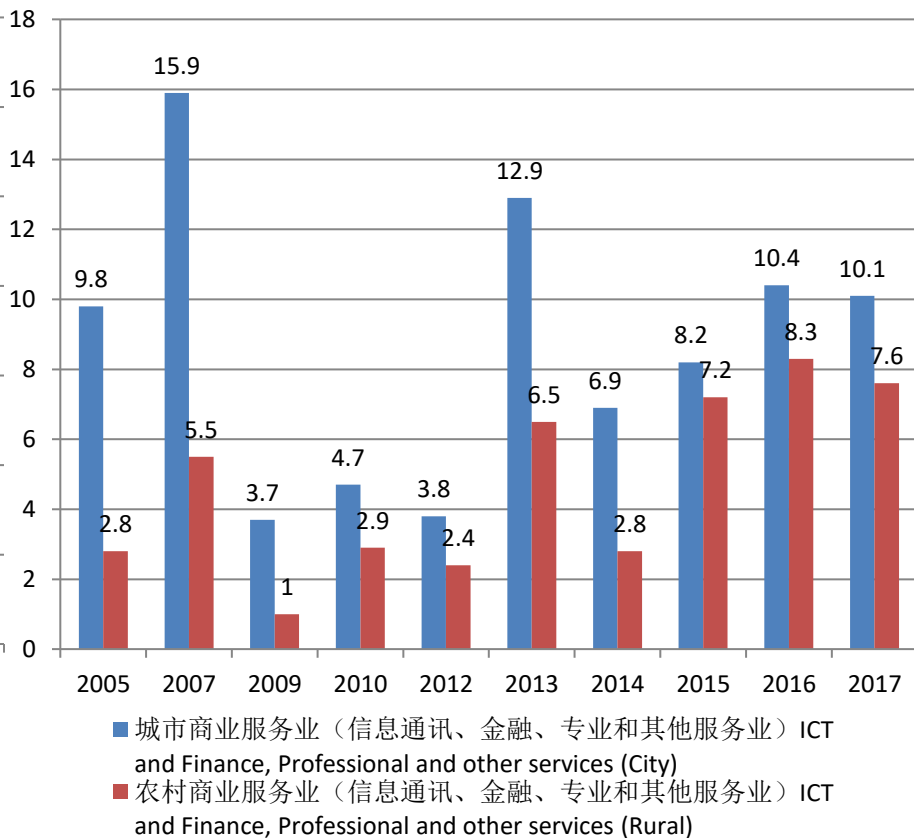
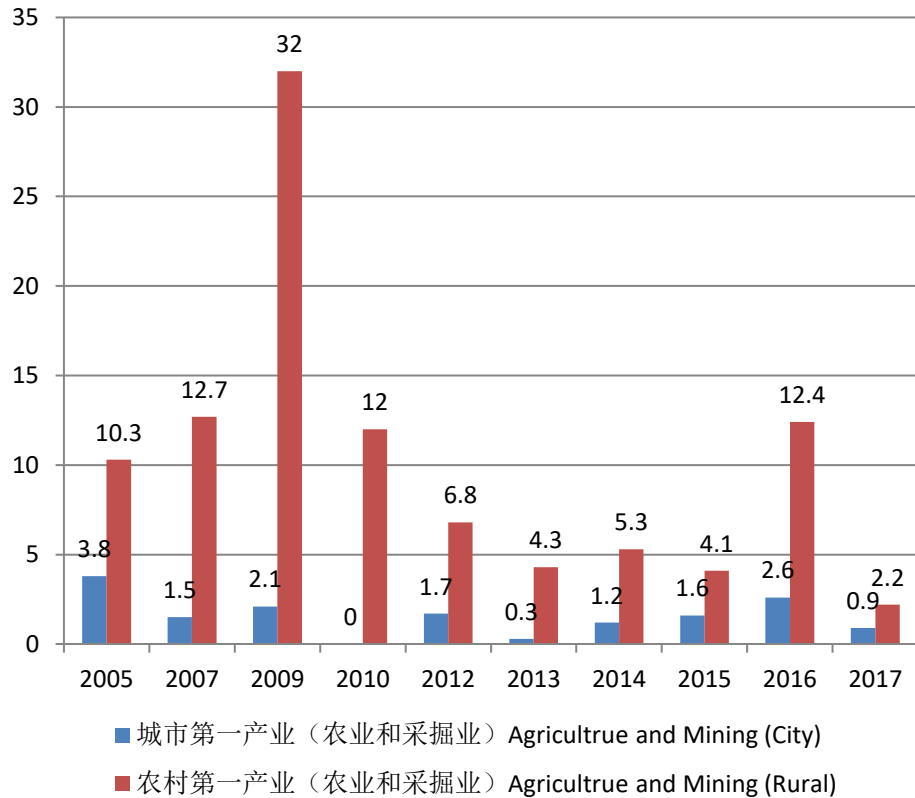
	城市TEA (TEA in Cities)	机会型占比 (Ratio of opportunity-based)	生存型占比 (Ratio of necessity- based)	农村TEA (TEA in Rural area)	机会型占比 (Ratio of opportunity-based)	生存型占比 (Ratio of necessity- based)
2005	10.00	64.30	35.70	16.00	46.50	53.50
2007	15.60	65.00	35.00	17.20	49.40	50.60
2009	17.50	53.80	46.20	20.50	43.00	57.00
2010	13.40	57.00	43.00	15.50	55.80	44.20
2012	13.30	62.40	37.60	13.40	65.90	34.10
2013	16.70	67.10	32.90	12.70	60.30	39.70
2014	14.20	65.40	34.60	17.70	66.00	34.00
2015	13.10	63.70	36.30	10.70	58.60	41.40
2016	9.40	67.50	32.50	8.90	63.50	36.50
2017	11.10	66.50	33.50	10.20	61.00	39.00

城乡差异（城市的女性创业逐渐活跃）

The differences between cities and rural area (The women entrepreneurship in cities gradually overtake its counterpart in rural area)



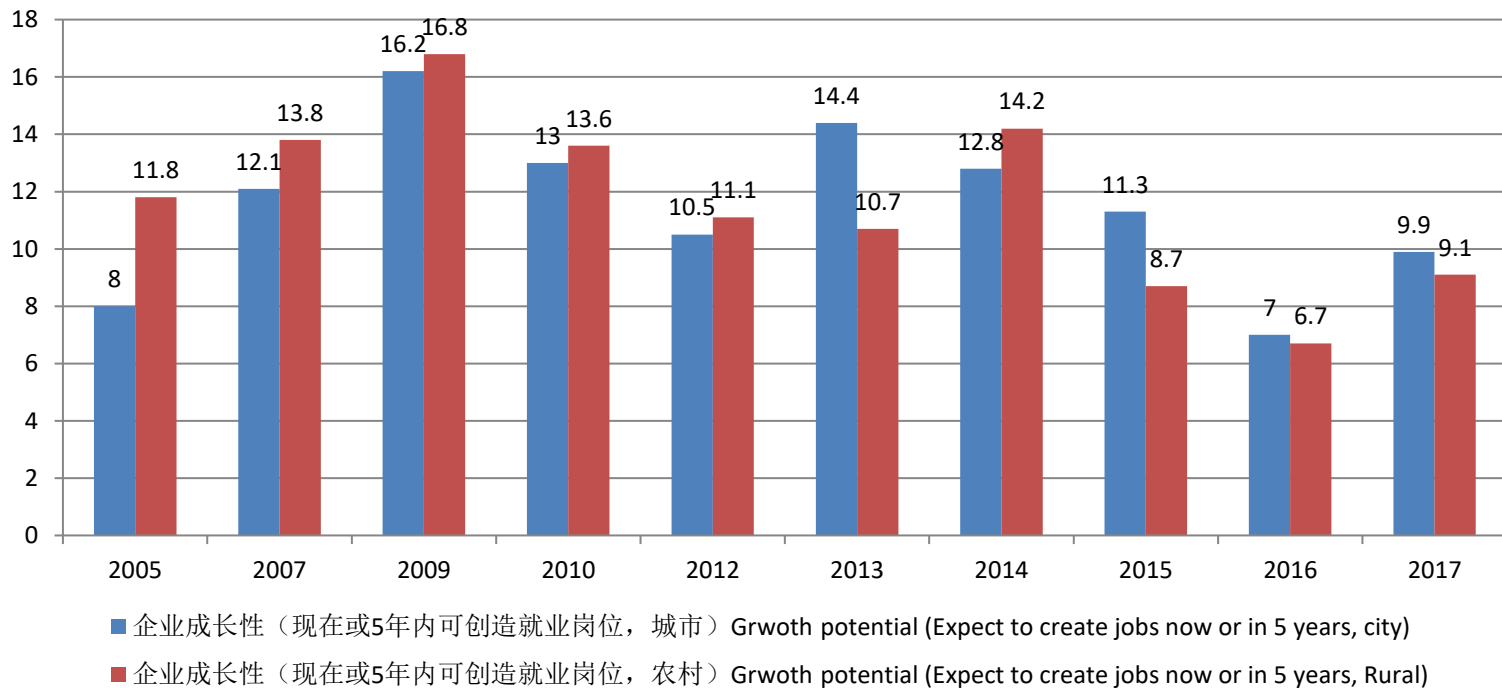
城乡差异（农村农业和采掘业创业较多，而城市商业服务业创业比例更高）
 The differences between cities and rural area (More entrepreneurship in agriculture and mining industry in rural area, while, more business service industry entrepreneurship in cities)



城乡差异（城市创业企业的成长性逐渐超过农村）

The differences between cities and rural area (The growth potential of the start up companies in cities gradually overtake its counterpart in rural area)

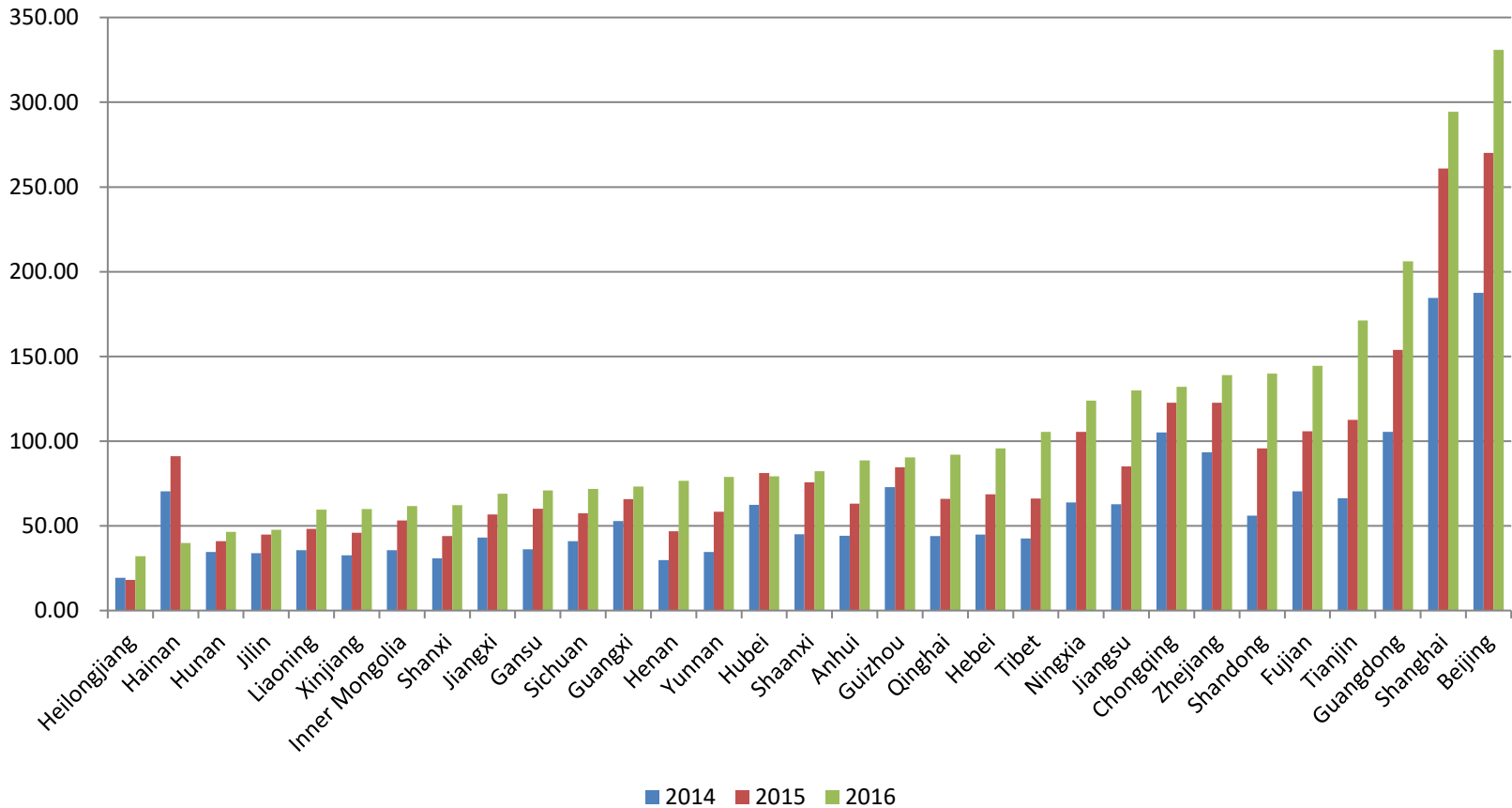
**Percentage of adults who start up and expect to create jobs
now or in 5 years**



区域创业活动的差异：中国私营企业创业指数（CPEA）

The regional disparities of entrepreneurial activities: China Private Entrepreneurship Activity Index

Number of Start up companies per 10,000 adults(15-64 years old)



不同地区创业活跃程度的变化趋势

The changes of entrepreneurial activities between different provinces

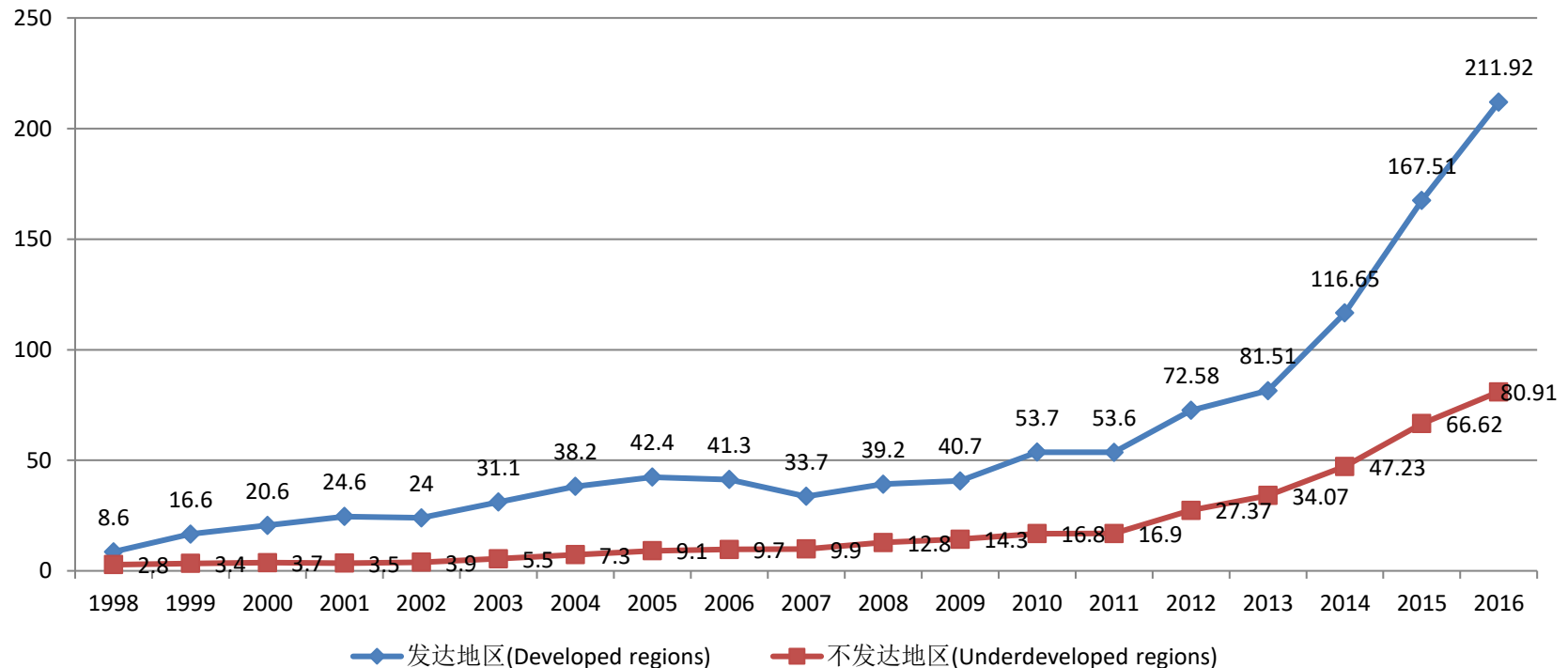
Year	高活跃地区 (Highly active)	活跃地区 (Active)	不活跃地区 (Inactive)	沉寂地区 (Silent)
2016	Beijing、Shanghai、Guangdong、Tianjin、Fujian、Shandong	Zhejiang、Chongqing、Jiangsu、Ningxia、Tibet、Hebei、Qinghai、Guizhou、Anhui、Shaanxi	Hubei、Yunnan、Henan、Guangxi、Sichuan、Gansu、Jiangxi、Shanxi、Inner Mongolia	Xinjiang、Liaoning、Jilin、Hunan、Hainan、Heilongjiang
2011	Shanghai、Beijing、Jiangsu 、Guangdong、Hainan、Zhejiang、Tianjin	Fujian、Shaanxi、Liaoning、Guangxi、Jiangxi、Shandong、Ningxia、Jilin、Inner Mongolia	Anhui、Shanxi、Hebei、Hubei、Henan、Hunan、Jiangxi、Yunnan	Gansu、Guangxi、Guizhou、Qinghai、Xinjiang、Heilongjiang
2006	Shanghai、Beijing、Jiangsu、Guangdong、Tianjin、Zhejiang	Fujian、Hainan、Liaoning、Ningxia、Jilin、Shandong、Shanxi、Sichuan 、Xinjiang	Anhui、Chongqing、Hebei、Hubei、Henan、Hunan、Jiangxi、Yunnan、Inner Mongolia	Gansu、Guangxi、Guizhou、Qinghai、Shaanxi、Tibet 、Heilongjiang
2000	Shanghai、Beijing、Jiangsu 、Tianjin、Zhejiang、Shaanxi	Chongqing、Fujian、Guangdong、Hainan、Hebei、Liaoning、Shandong、Ningxia、Inner Mongolia	Anhui、Gansu、Guizhou、Jilin、Qinghai、Sichuan、Yunnan、Xinjiang、Heilongjiang	Hubei、Hunan、Guangxi 、Henan、Jiangxi、Shanxi

标准(Standard):
高活跃地区前20%；沉寂地区后20%； (Top 20% of CPEA scores are highly active regions and last 20% are silent regions)
活跃地区和不活跃地区各占30%（中间部分） (Active and inactive regions account for the middle 30% respectively)

发达地区和不发达地区间的差距

The gap between developed regions and underdeveloped regions

Number of Start up companies per 10,000 adults(15-64 years old)



Developed regions: Beijing, Shanghai, Tianjin, Guangdong, Zhejiang and Jiangsu

Underdeveloped regions: Provinces and cities except the 6 cities and provinces above

Developed and underdeveloped regions are classified by the GDP per capita and its CPEA score of each province or city.

创业地区差异的决定因素

Determinant factors for the regional disparities of entrepreneurial activities

Independent variables (A year Lagged)	Model1	Model2	Model 3	Model4
Constants	-0.59 (-0.35)	-1.74 (-1.53)	-5.29** (-4.95)	-12.39** (-8.34)
Change of population	0.07** (4.52)	0.03 (1.87)	0.09** (4.79)	0.03 (1.86)
Growth of consumption	0.12* (2.34)	0.13** (2.62)	0.16** (3.26)	0.16** (2.60)
Industrial structure upgrading	0.72** (2.75)	0.82** (2.86)	1.21** (4.37)	1.30** (4.60)
Level of human capital	0.46** (7.08)	0.65** (11.30)		
Level of technology development	0.26** (7.03)		0.36** (11.56)	
Level of private wealth	-0.25 (-1.54)			0.99** (6.89)
Level of entrepreneurial culture	1.02* (2.33)	1.33** (2.91)	1.40** (3.08)	1.33** (2.74)

*P<0.05, ** p<0.01, z statistics are in parentheses。

创业地区差异的决定因素

Determinant factors for the regional disparities of entrepreneurial activities

上表的研究中选取了2006-2016年除西藏外30个省（直辖市、自治区）的面板数据对造成创业活动地区差异的因素进行了回归分析。

The table above shows the regression results of the different factors' impacts on the entrepreneurial actives(CPEA) in 30 provinces and cities by using panel data from 2006 to 2016.

研究发现(Research finds):

1.创业文化水平和产业结构变化对不同地区CPEA得分的影响最为显著。私营企业就业人数越多以及第三产业GDP占比越高，该地区的创业活动就越发达。

The level of entrepreneurial culture and the Industrial structure upgrading are the most influential factors among different provinces. More employments in the private business sector and higher ratio of the tertiary industry proportion of GDP, the entrepreneurial activities are more active in a region.

2.人力资本和技术发展水平也与CPEA的得分显著相关。劳动力人口中本科以上学历比重越高以及发明专利授权量越多，则该地区的创业活动就越发达。

Level of human capital and technology development also have significant positive impacts on entrepreneurial activities. The higher ratio of labour with bachelor degrees and more granted patents for invention, the entrepreneurial activities are more active in a region.

3. 市场需求和人口变化对区域创业活动的影响程度相对较弱。

The changes of population and consumptions have less influence on entrepreneurial activities compared to other factors.

谢谢！

Thank you!