

2018/2019 全球创业观察中国报告
2018/2019 Global Entrepreneurship Monitor China Report

二十国集团创业研究中心
The Entrepreneurship Research Center on G20 Economies
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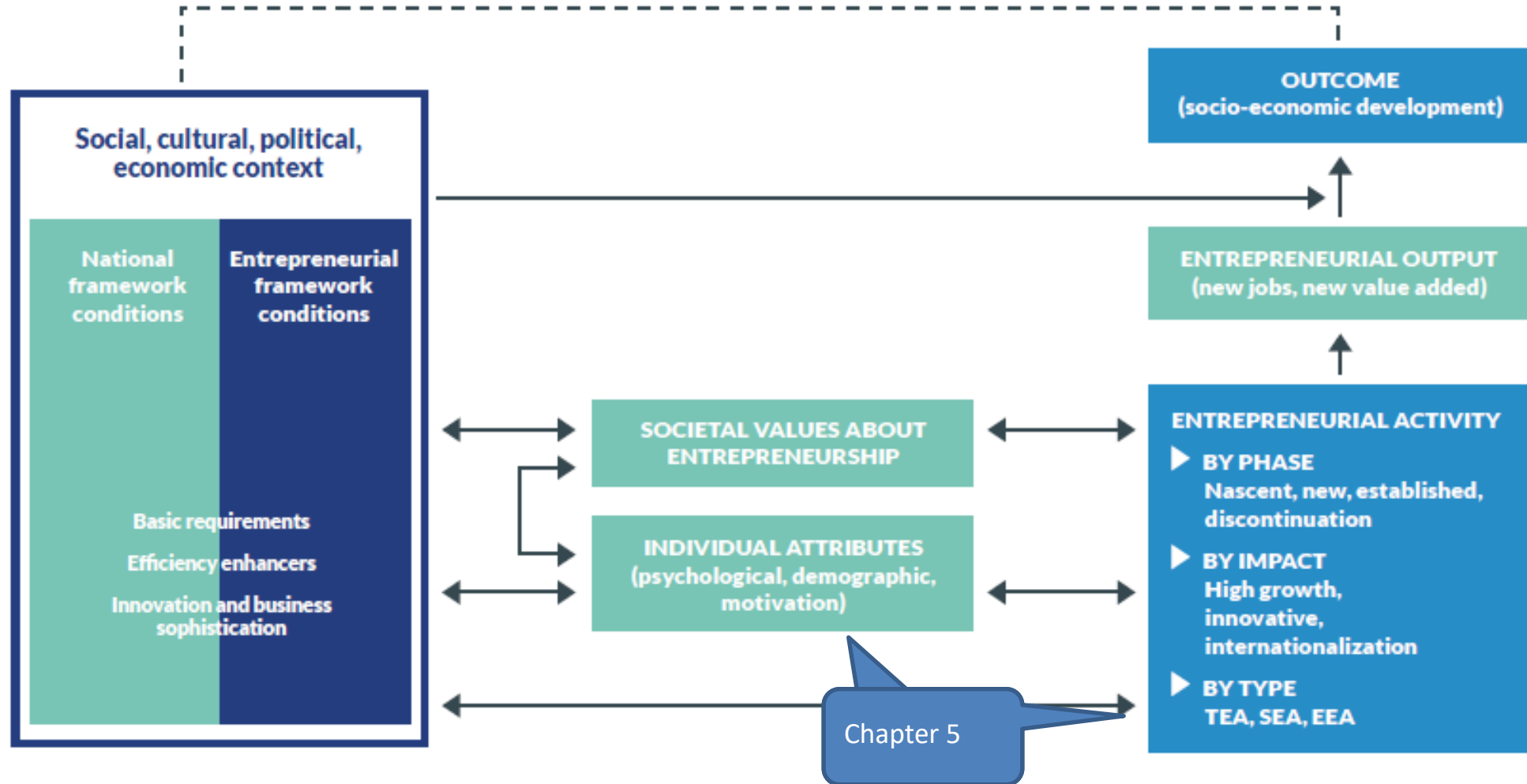
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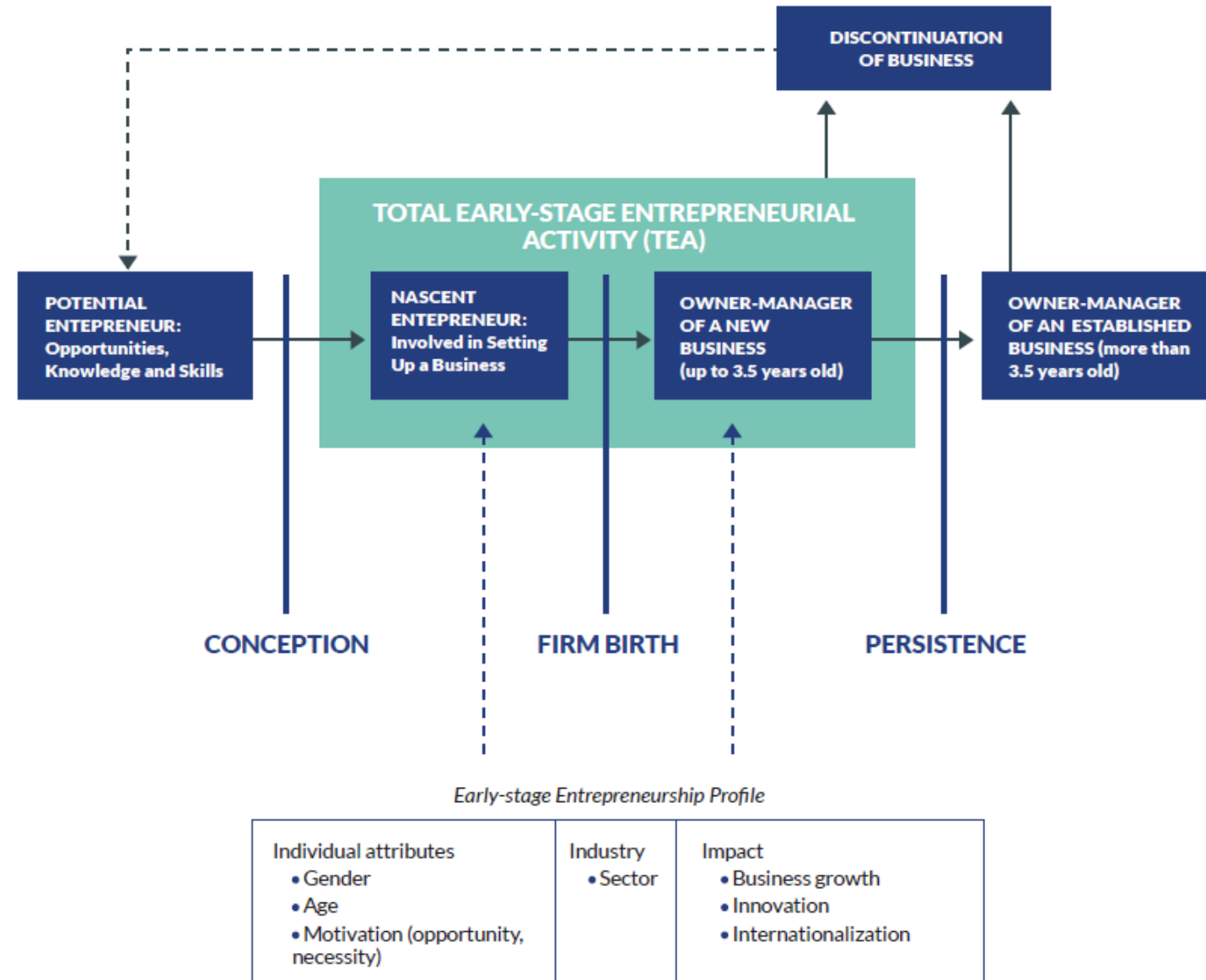
一、全球创业观察研究框架

1. The conceptual framework of Global Entrepreneurship Monitor research

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



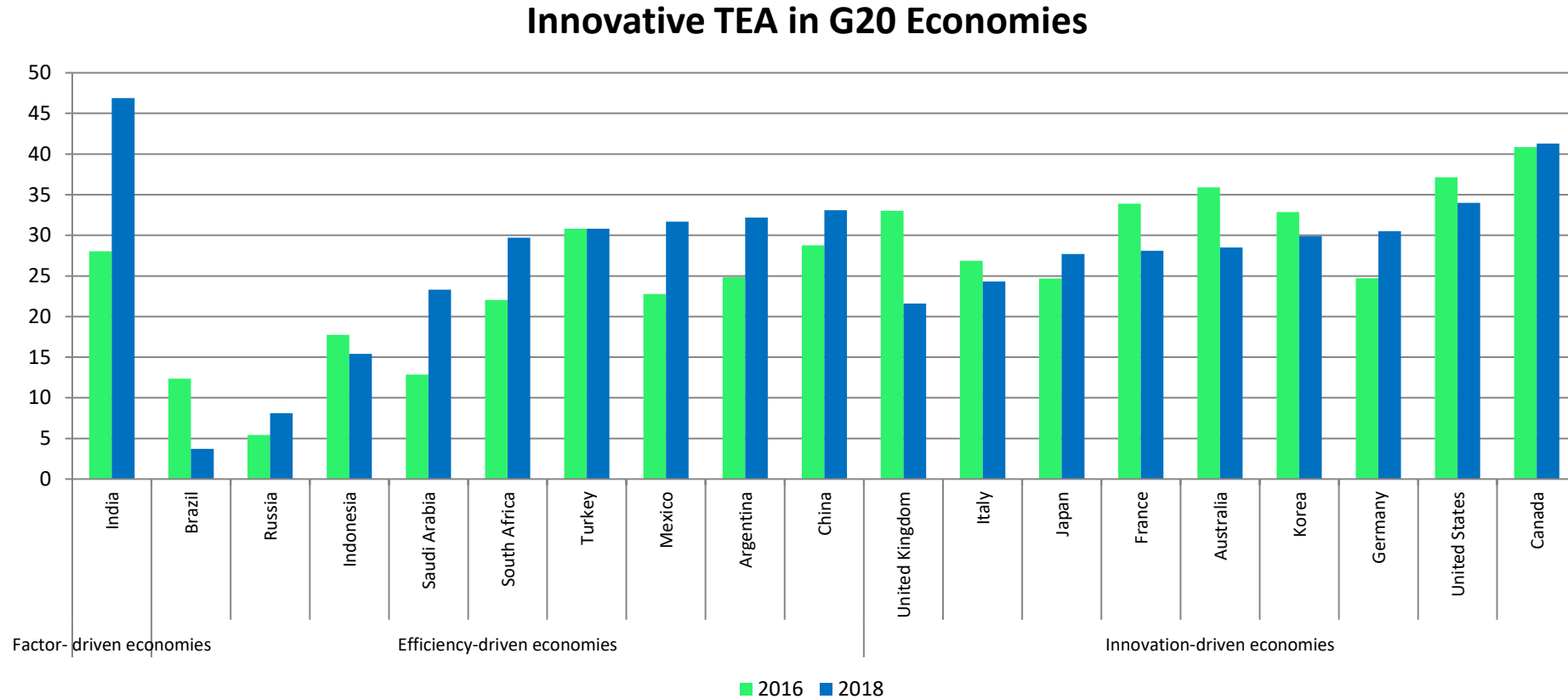
GEM创业过程分解(Phases of entrepreneurship in the GEM research framework)



二、G20经济体创业活动的质量

2. The quality of entrepreneurship in G20 economies

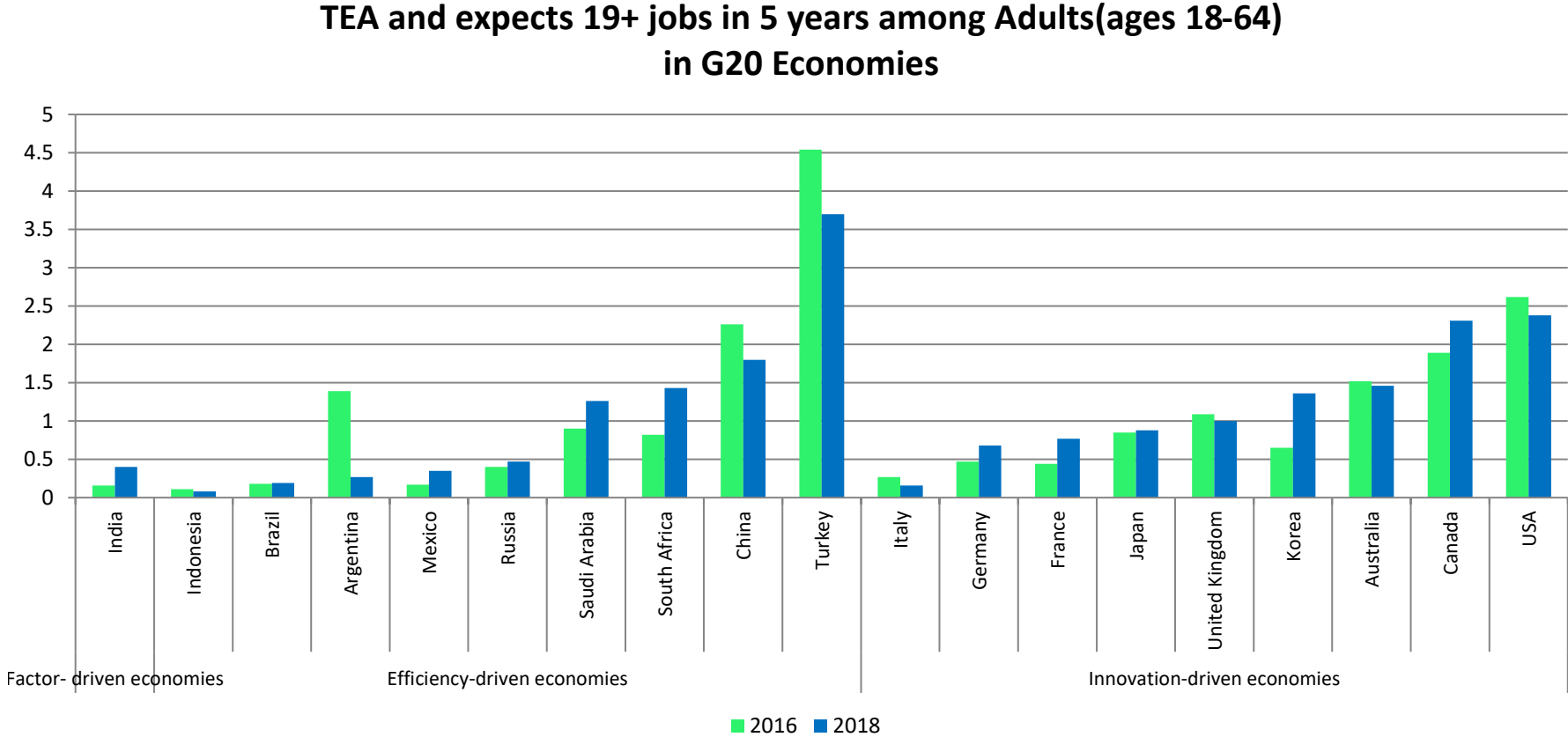
1. 创新(Innovation)



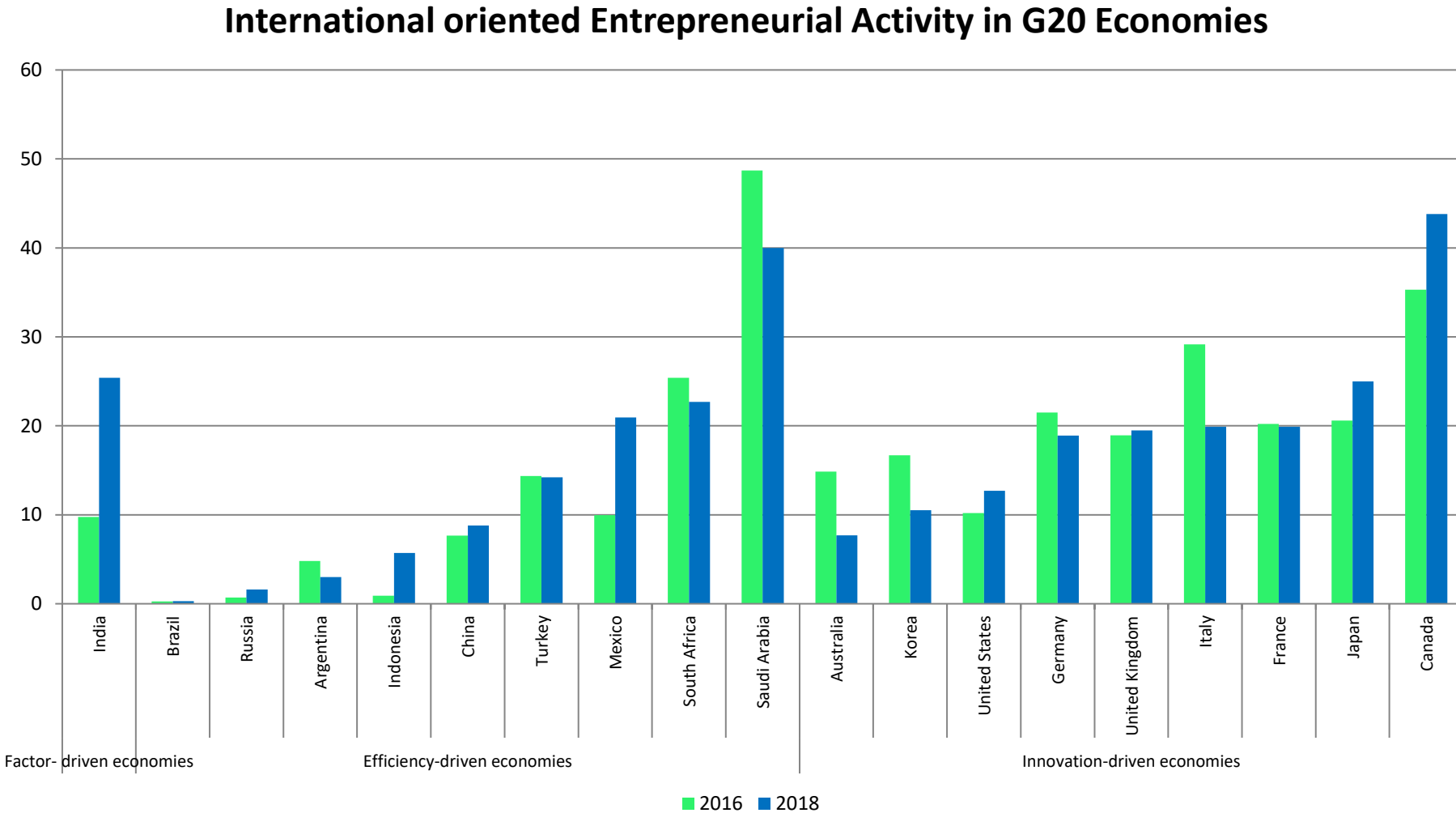
The role and nature of entrepreneurship are considered to differ in terms of a country's stage of economic development. Three major stages of economic development can be identified according to the WEF Global Competitiveness Reports. The factor-driven phase is dominated by subsistence agriculture and extraction businesses, with a heavy reliance on (unskilled) labor and natural resources. In the efficiency-driven phase, an economy has become more competitive with further development accompanied by industrialization and an increased reliance on economies of scale, with capital-intensive large organizations more dominant. As development advances into the innovation-driven phase, businesses are more knowledge-intensive, and the service sector expands.

Innovative entrepreneurs are those who state their products or services are new to all or some customers and for which there are no or few competitors.

2. 高成长(Growth Expectations)

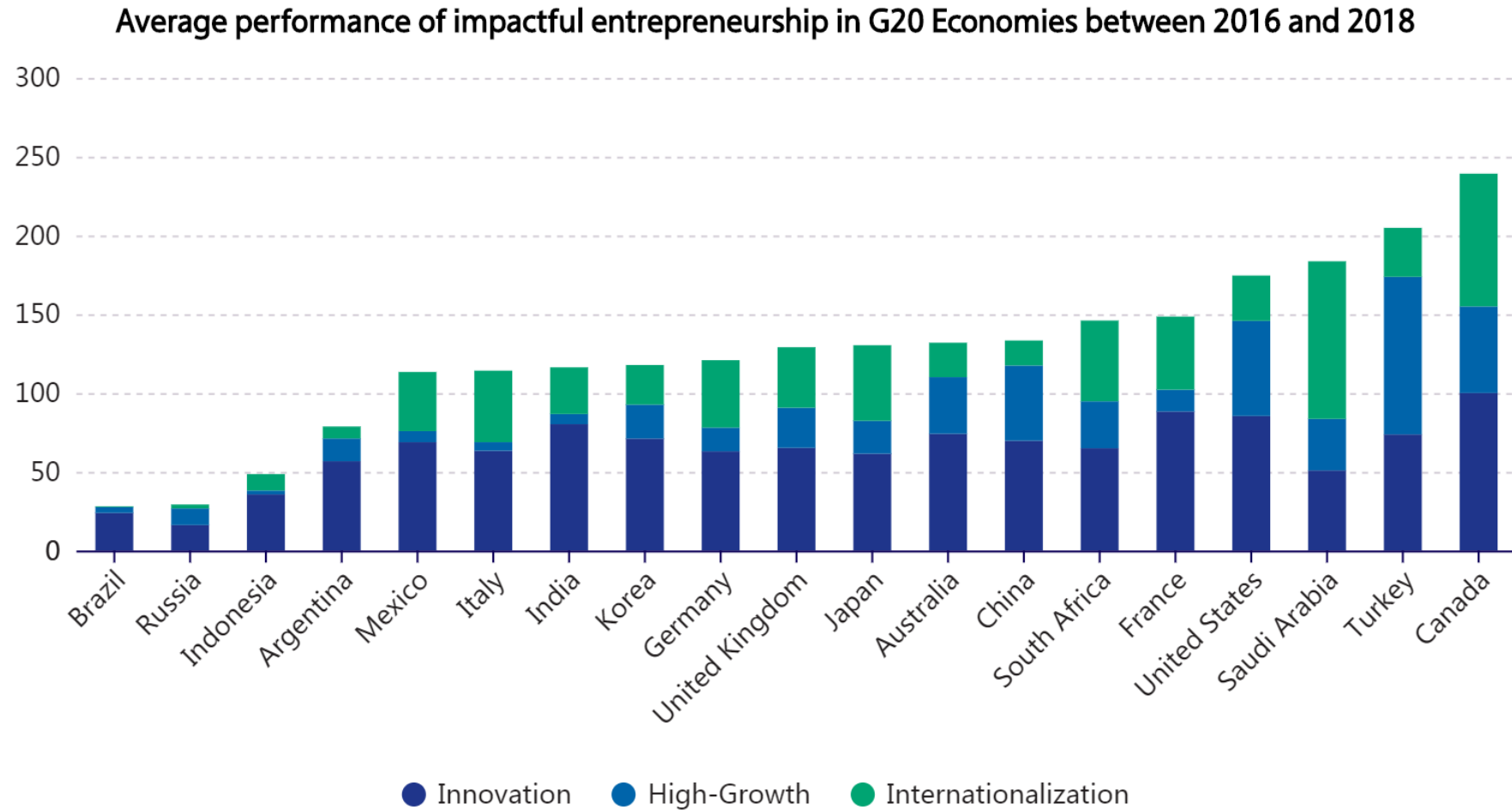


3. 国际化(Internationalization)



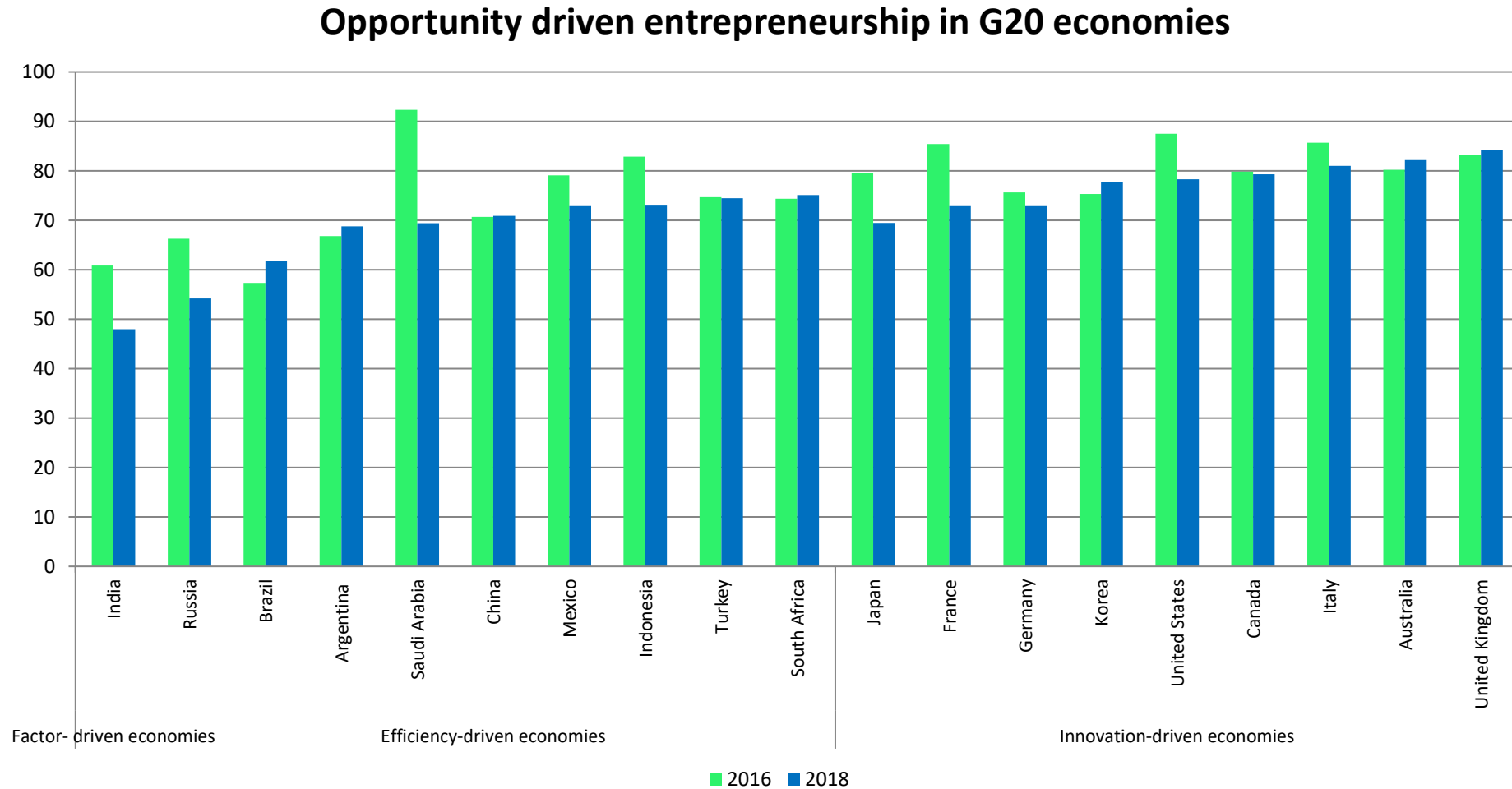
% within TEA: strong international orientation (more than 25% of revenue from outside country)

4. 创业质量(The impactful entrepreneurship)



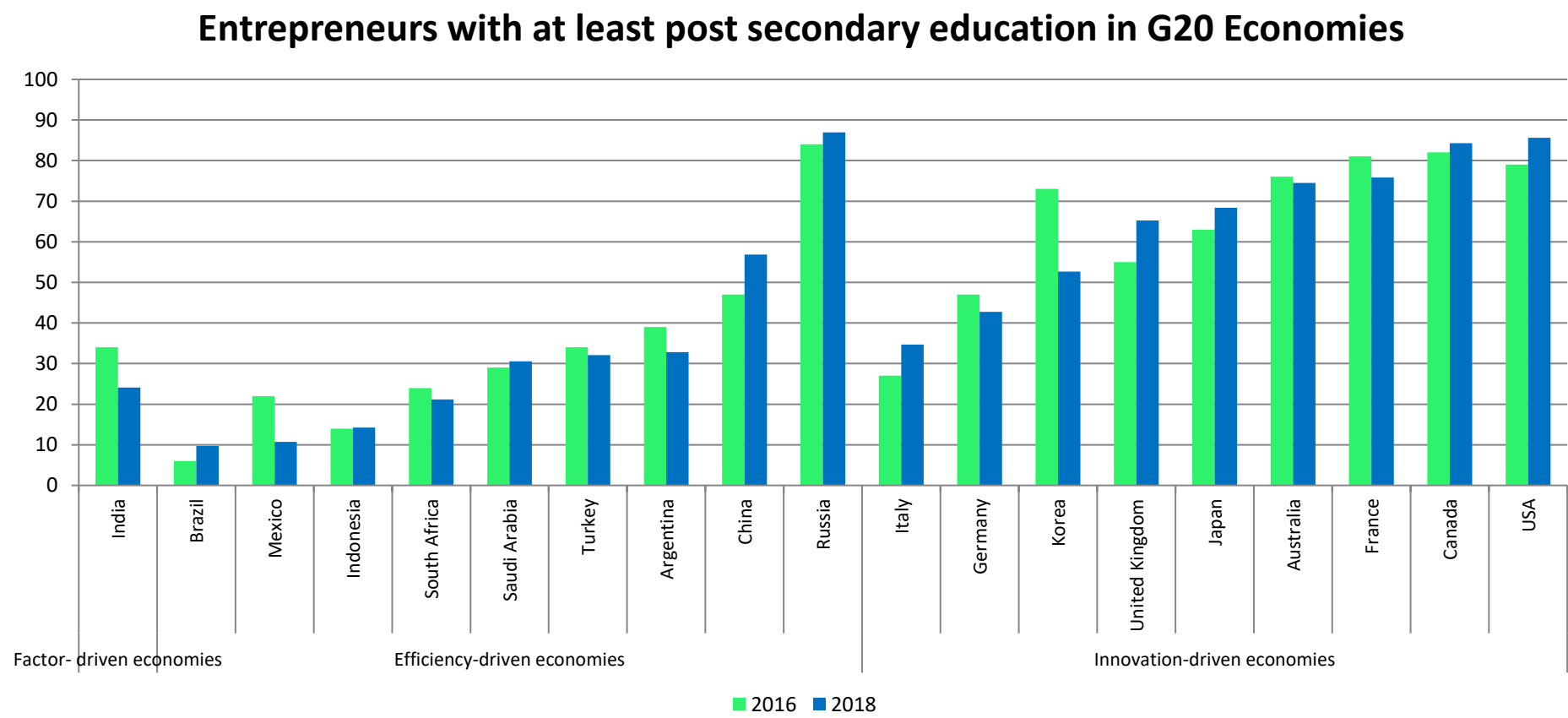
Scores are added by the standardized score of innovation, high growth expectation, and international orientation from 2016 to 2018.

5. 创业动机(Motivation of Entrepreneurship)

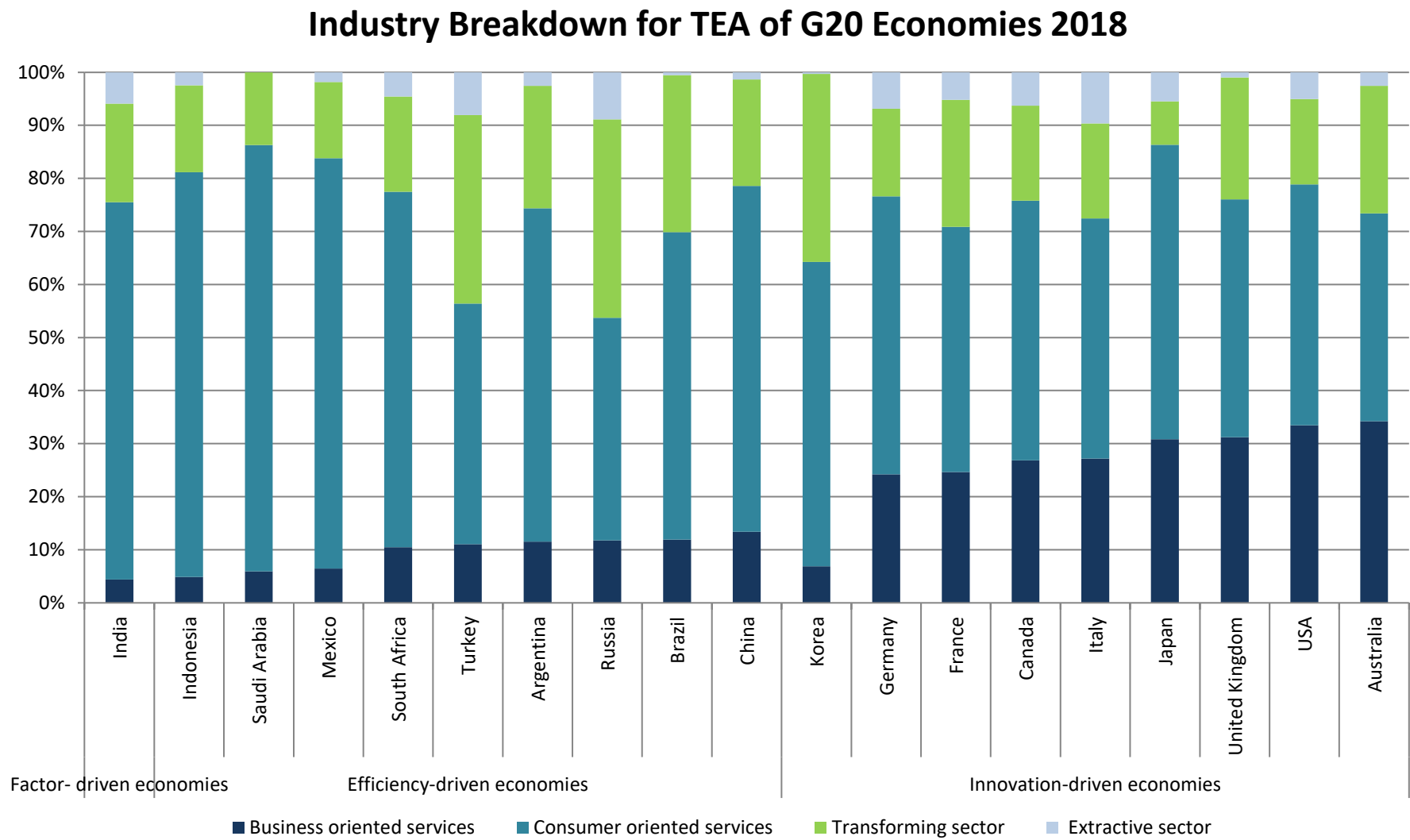


The majority of entrepreneurship are opportunity driven rather than necessity driven in G20 economies.

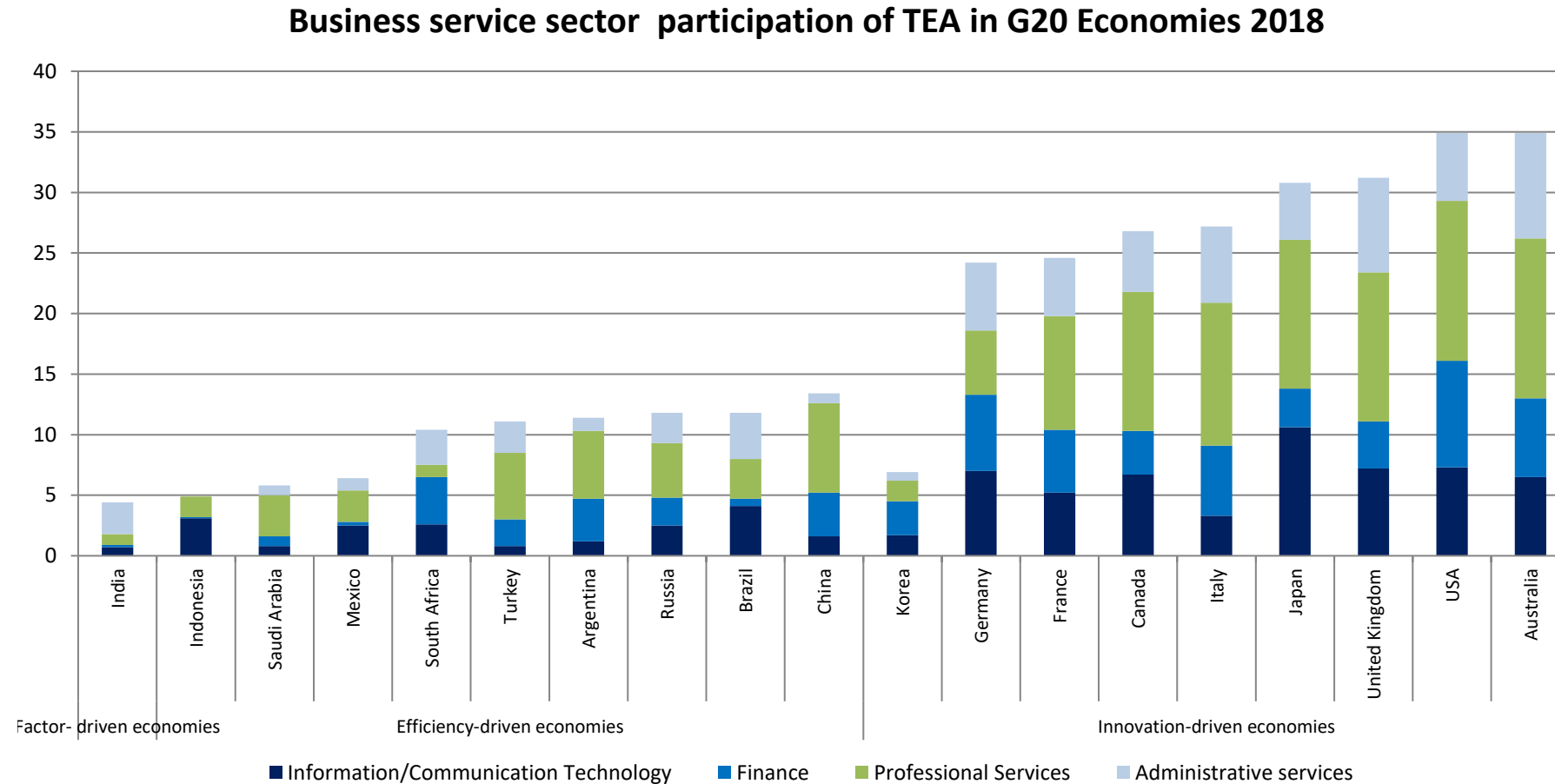
6. 受教育程度(Educational attainments of Total early-stage Entrepreneurial Activity)



7. 产业分布(Industry)



7. 产业分布(Industry)

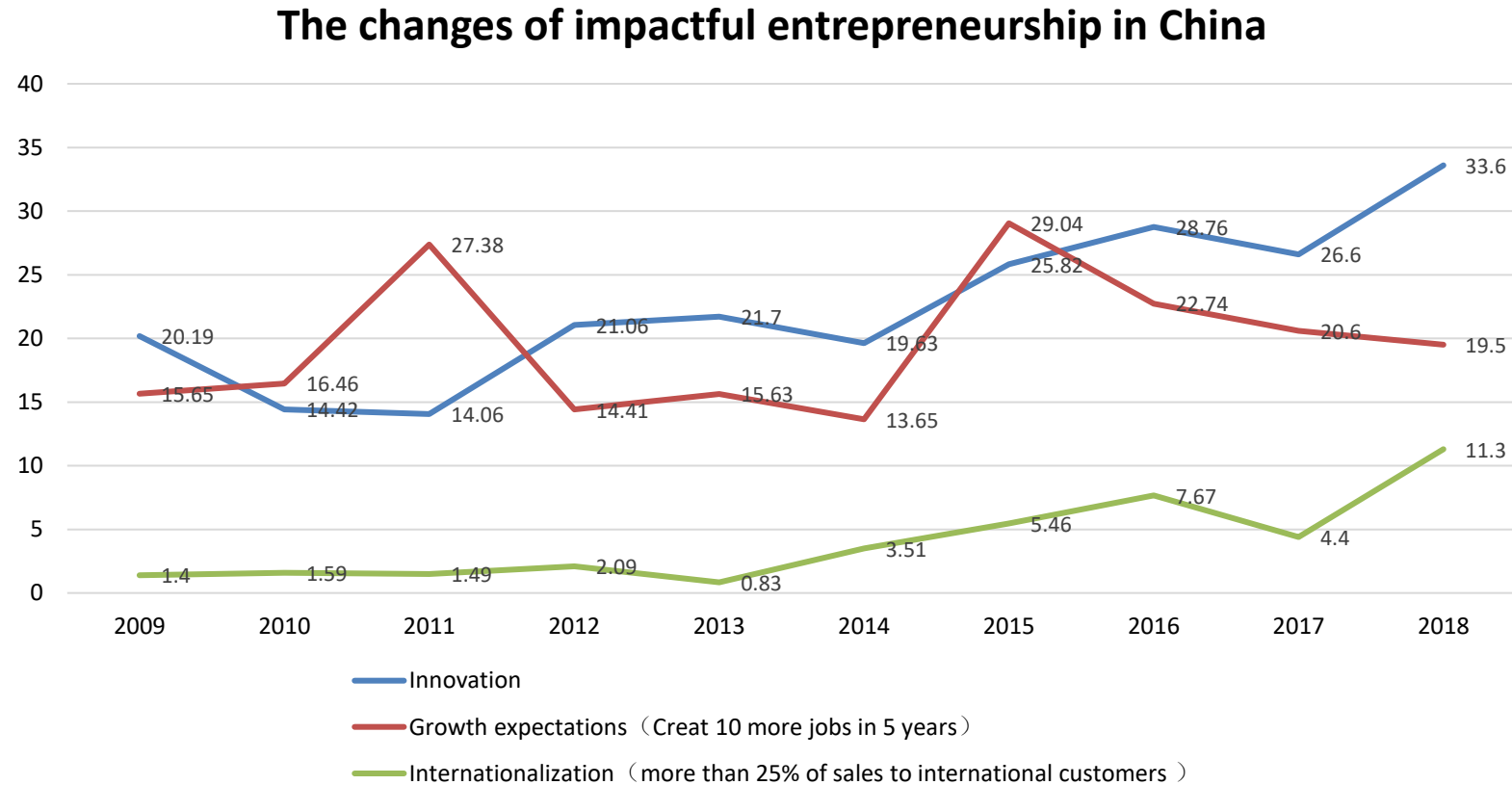


More ICT and professional services entrepreneurship in innovation-driven economies than the efficiency/factor driven economies.

三、 十年间持续改善的中国创业质量

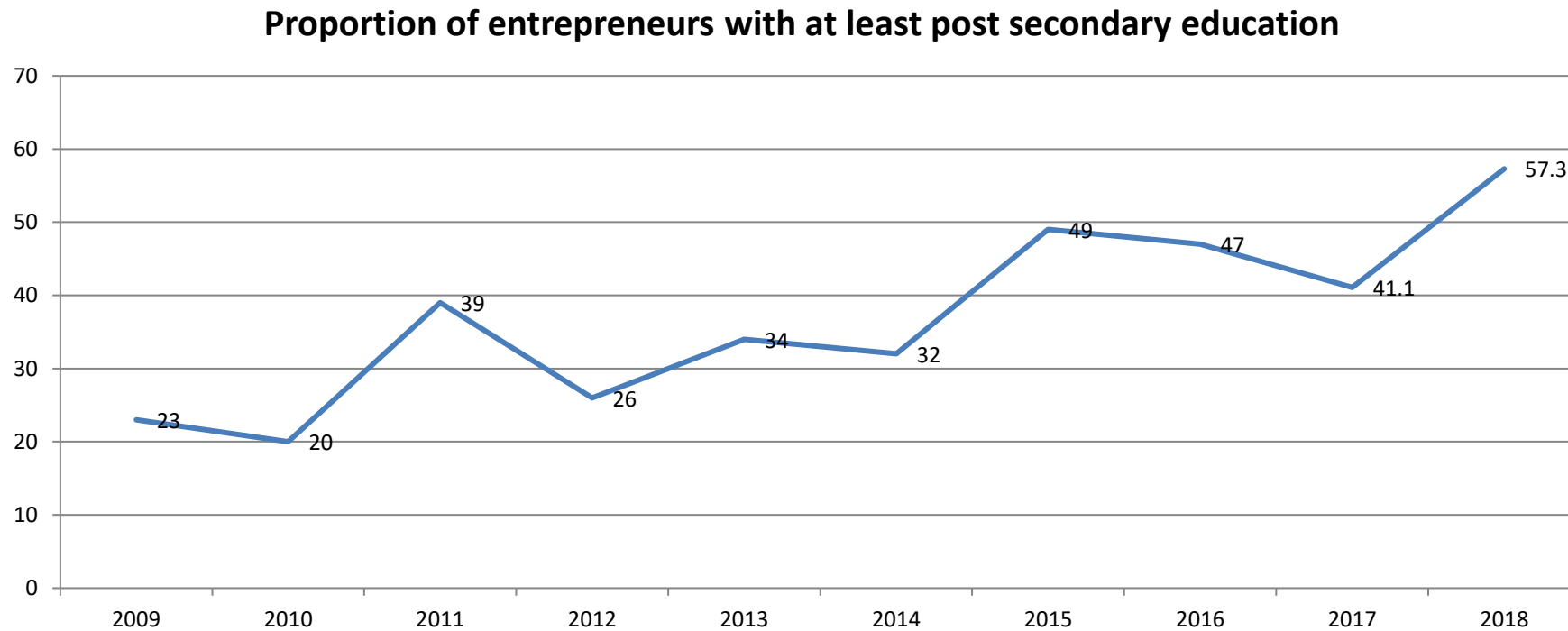
3. The improving quality of entrepreneurship in China in the last decade

1. 中国创业活动的质量(The impactful Entrepreneurship in China)



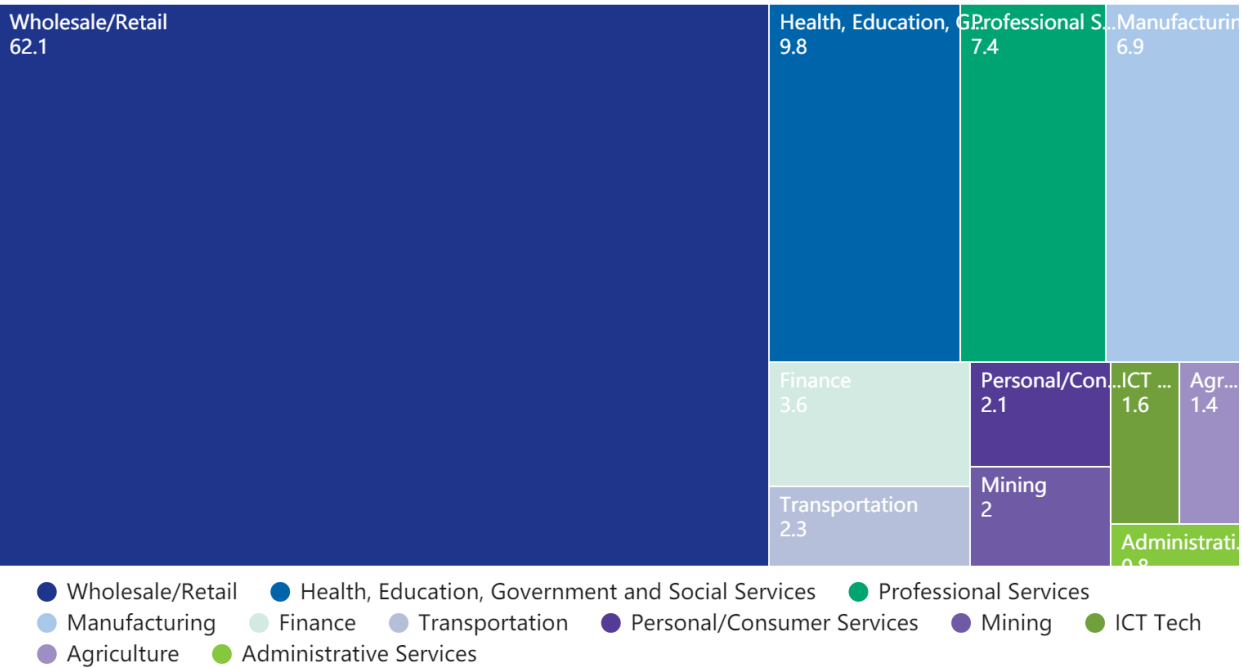
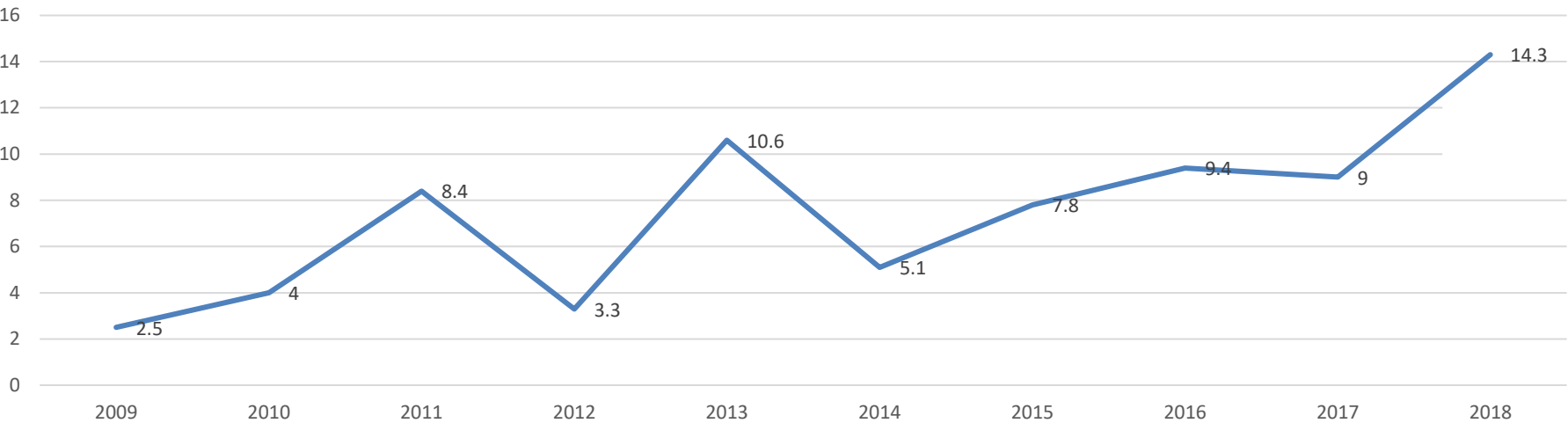
The degree of innovation and international orientation of entrepreneurship in China is increasing, however, the job create expectations is fluctuating in the last decade.

2. 中国创业者受教育程度(The educational attainments of entrepreneurs in China)

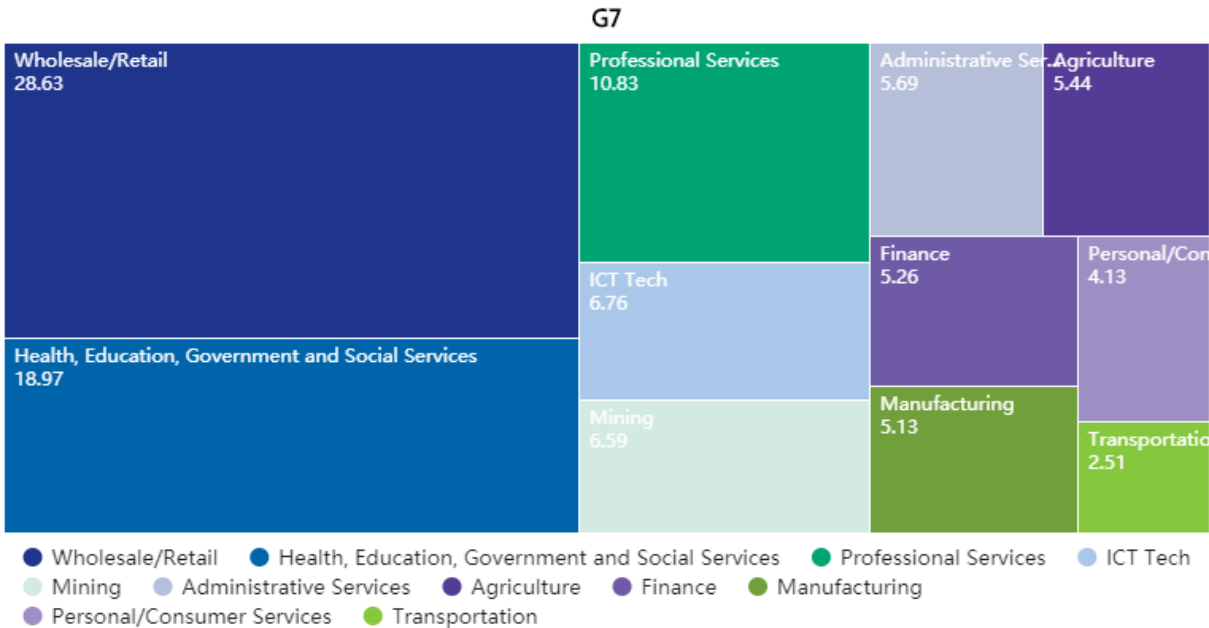
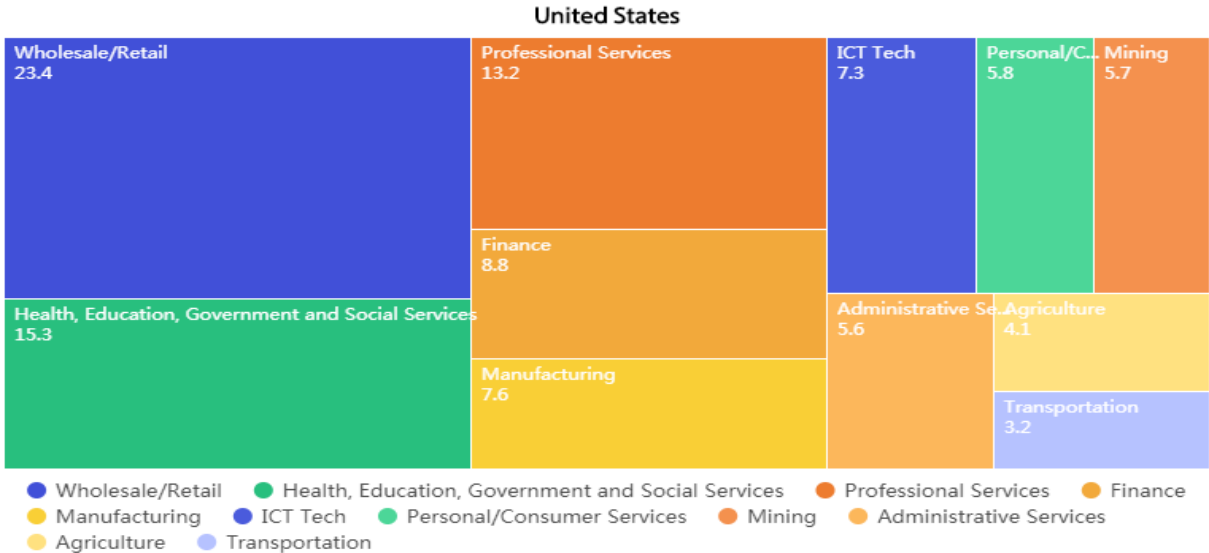


3. 中国创业活动的产业分布(The industry participation of entrepreneurship in China)

Percentage of entrepreneurs starts in business service sectors



4. 美国及G7经济体创业活动的产业分布(The Industry distribution of the entrepreneurship in United States and the G7)



四、 G20经济体的创业环境

4. The Entrepreneurship Context in G20 economies

1. G20经济体的创业环境框架条件（The entrepreneurship framework conditions in G20 economies）

	Finance	Government Policies: support and relevance	Government policies: taxes and bureaucracy	Government programs	Education at school stage	Education at post-school stage	R&D transfer	Commercial and legal infrastructure	Internal market dynamics	Internal market burdens	Physical infrastructure	Cultural and social norms
INDONESIA	5.91	6.27	5.46	5.65	5.12	6.37	5.46	5.75	6.64	5.43	6.46	6.45
INDIA	5.65	6.33	4.71	5.7	4.52	5.23	5.23	5.73	6.45	5.26	6.62	5.58
USA	5.95	4.17	4.68	4.38	4.33	5.49	4.39	5.92	5.49	4.74	7.08	7.27
FRANCE	4.68	5.86	5.34	5.64	2.88	5.64	4.79	5.34	4.29	3.92	7.65	4.71
CANADA	5.27	4.94	4.31	4.85	4.13	4.78	4.8	6.07	4.24	4.51	6.71	5.58
CHINA	4.6	4.79	4.6	4.46	3.38	5.27	4.04	4.23	6.67	4.41	7.4	6.02
KOREA	4.66	6.14	4.45	5.15	3.4	4.36	4.01	4.26	7.2	3.77	6.69	5.12
GERMANY	4.75	4.28	4.34	5.81	3.03	4.55	4.57	5.69	5.07	5.14	6.06	4.45
JAPAN	4.95	5.37	4.04	4.42	2.32	4.14	4.97	4.38	6.97	4.45	7.33	3.62
ARGENTINA	3.2	6.22	3.63	5.26	2.97	5.03	4.5	5.07	5.57	4.2	5.56	5.35
MEXICO	3.99	4.63	3.67	5.07	3.03	5.8	4.21	4.43	5.64	3.69	6.71	5.59
TURKEY	4.76	4.54	3.47	4.18	2.76	5.05	4.5	5.53	6.22	4.19	6.07	5
AUSTRALIA	4.56	4.46	4.4	4.23	3.5	3.74	3.71	5.08	4.87	5.02	6.73	4.45
UK	4.98	3.39	4.89	4.01	2.95	4.35	4.18	5.16	4.91	4.44	5.59	4.82
RUSSIA	3.3	3.74	3.3	3.22	2.89	4.77	2.69	5.07	6.4	3.17	6.03	4.67
ITALY	4.62	4	3.12	3.93	2.65	4.46	4.05	4.27	5.01	4.3	4.99	3.5
SOUTH AFRICA	4.26	4.77	2.73	2.98	2.87	3.82	3.27	5.05	5.19	3.34	5.83	4.02
SAUDI ARABIA	3.91	3.92	4.04	3.43	2.12	3.65	2.99	3.86	4.82	3.95	6.82	4.61
BRAZIL	4.8	2.77	2.03	3.34	2.22	4.07	3.4	4.52	5.8	3.65	5.42	3.38
AVERAGE	4.67	4.77	4.06	4.51	3.21	4.77	4.20	5.02	5.66	4.29	6.41	4.96
SD of EFCs	0.72	1.01	0.85	0.87	0.78	0.73	0.72	0.65	0.87	0.62	0.71	0.98

1. G20经济体的创业环境框架条件（The entrepreneurship framework conditions in G20 economies）



01

Experts are more satisfied and confident

with their entrepreneurial context: Indonesia , India and united states

Experts are less satisfied and confident

with their entrepreneurial context: Brazil, Saudi Arabia and South Africa



02

Best entrepreneurial framework conditions in G20:

Physical infrastructure, Internal market dynamics and
Commercial and legal infrastructure

Worst entrepreneurial framework conditions in G20:

The entrepreneurial education in schools,
Government policies on taxes and bureaucracy and the R&D transfer



03

Entrepreneurial framework conditions with greatest difference of G20:

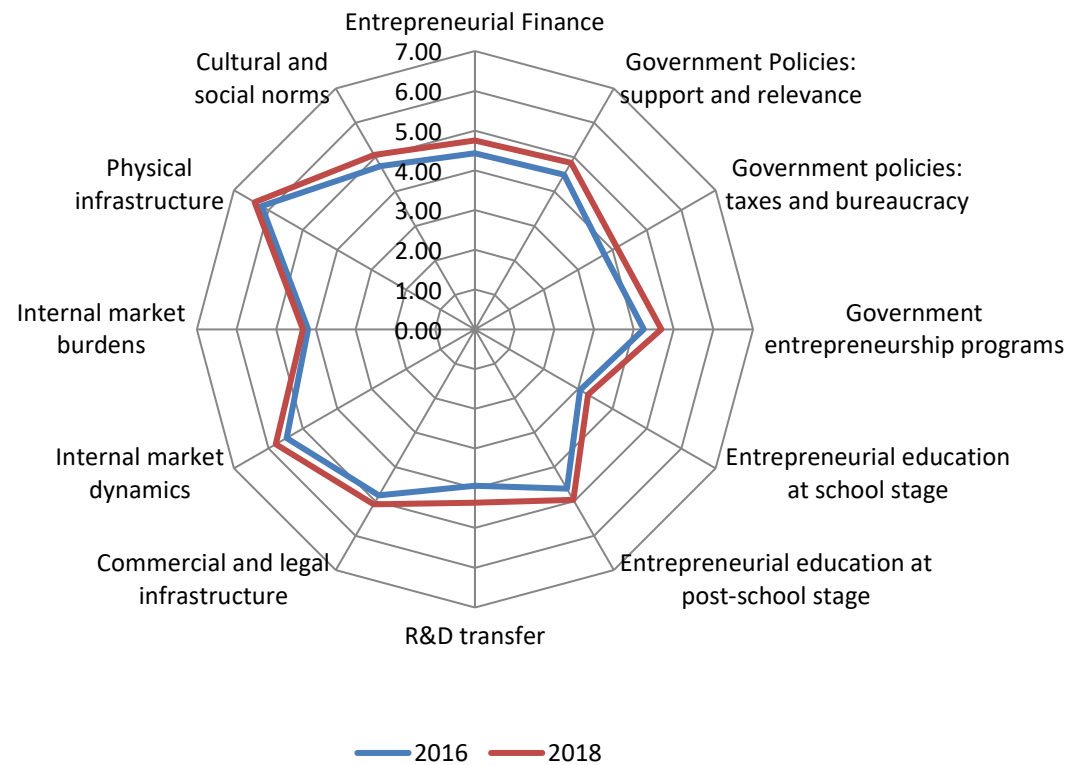
Government policies supports and relevance , Cultural and social norms

Entrepreneurial framework conditions with least difference of G20:

Internal market burdens and Commercial and legal infrastructure

2. G20经济体的创业环境有所改善（The entrepreneurship framework conditions are improving in G20 economies）

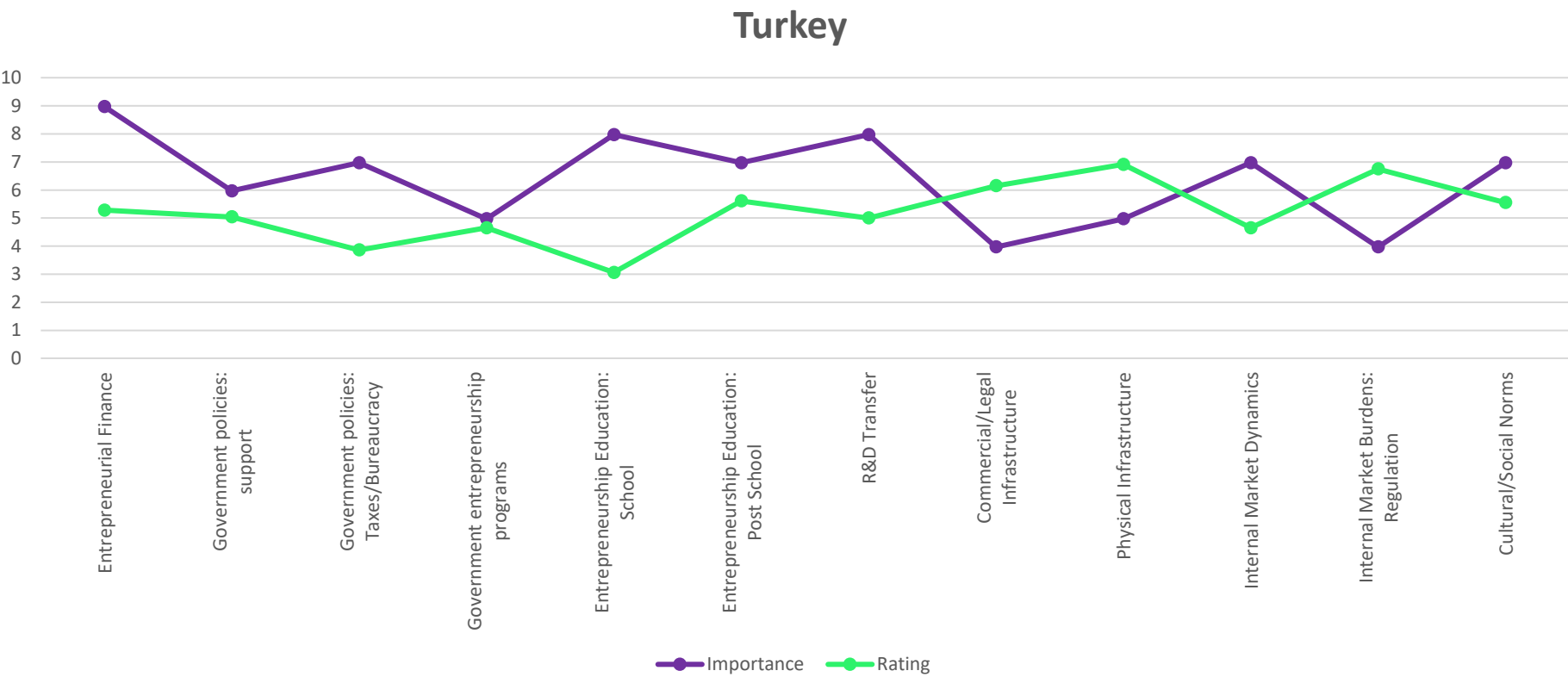
The expert ratings of the entrepreneurial framework conditions in G20 economies



The entrepreneurship framework conditions are improving in G20 economies, especially in finance, R&D transfer and government entrepreneurship programs.

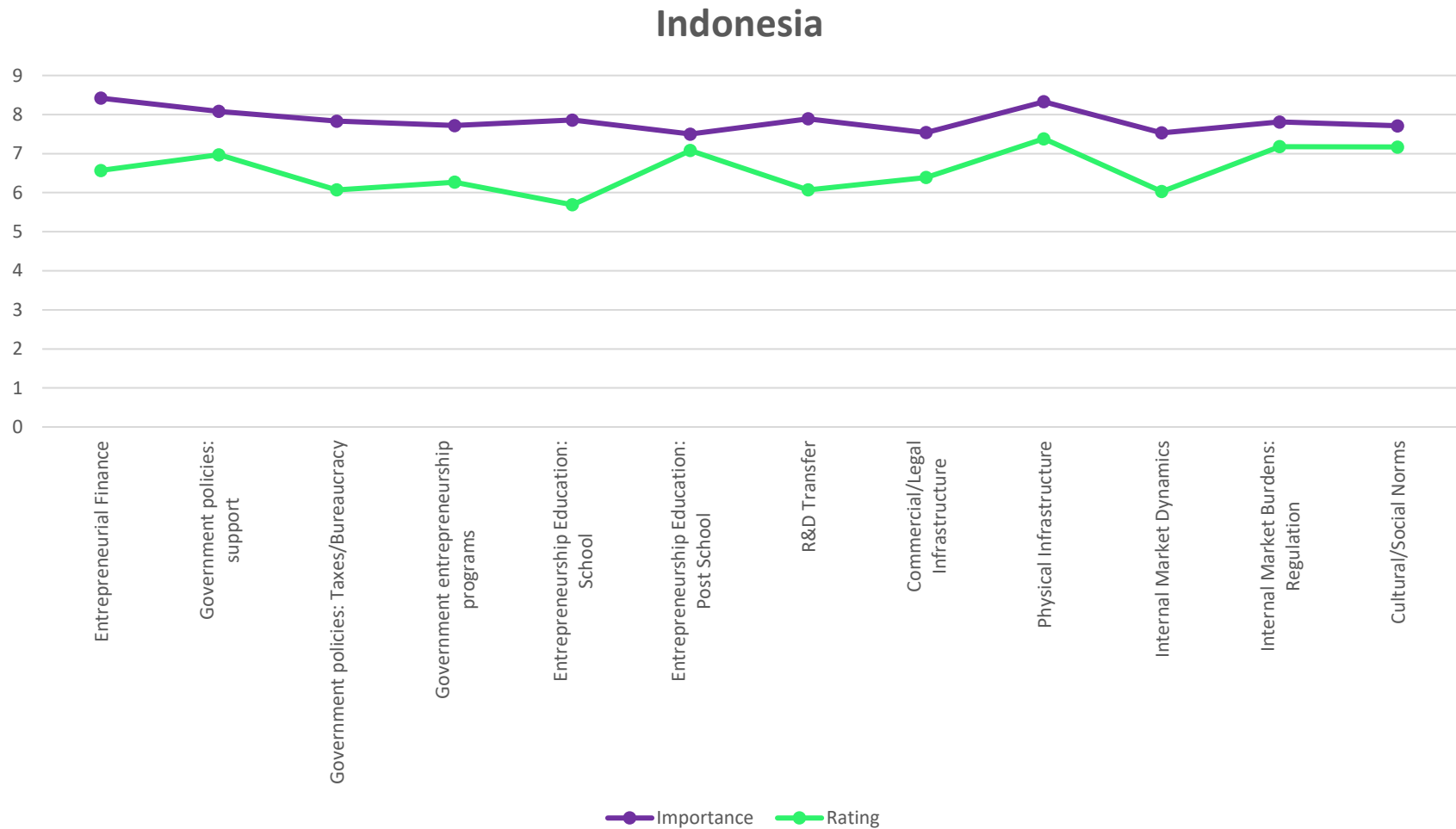
3. G20经济体创业环境框架条件得分和重要程度接近的经济体

The economies with experts' ratings close to the importance values of entrepreneurship framework conditions in G20 economies



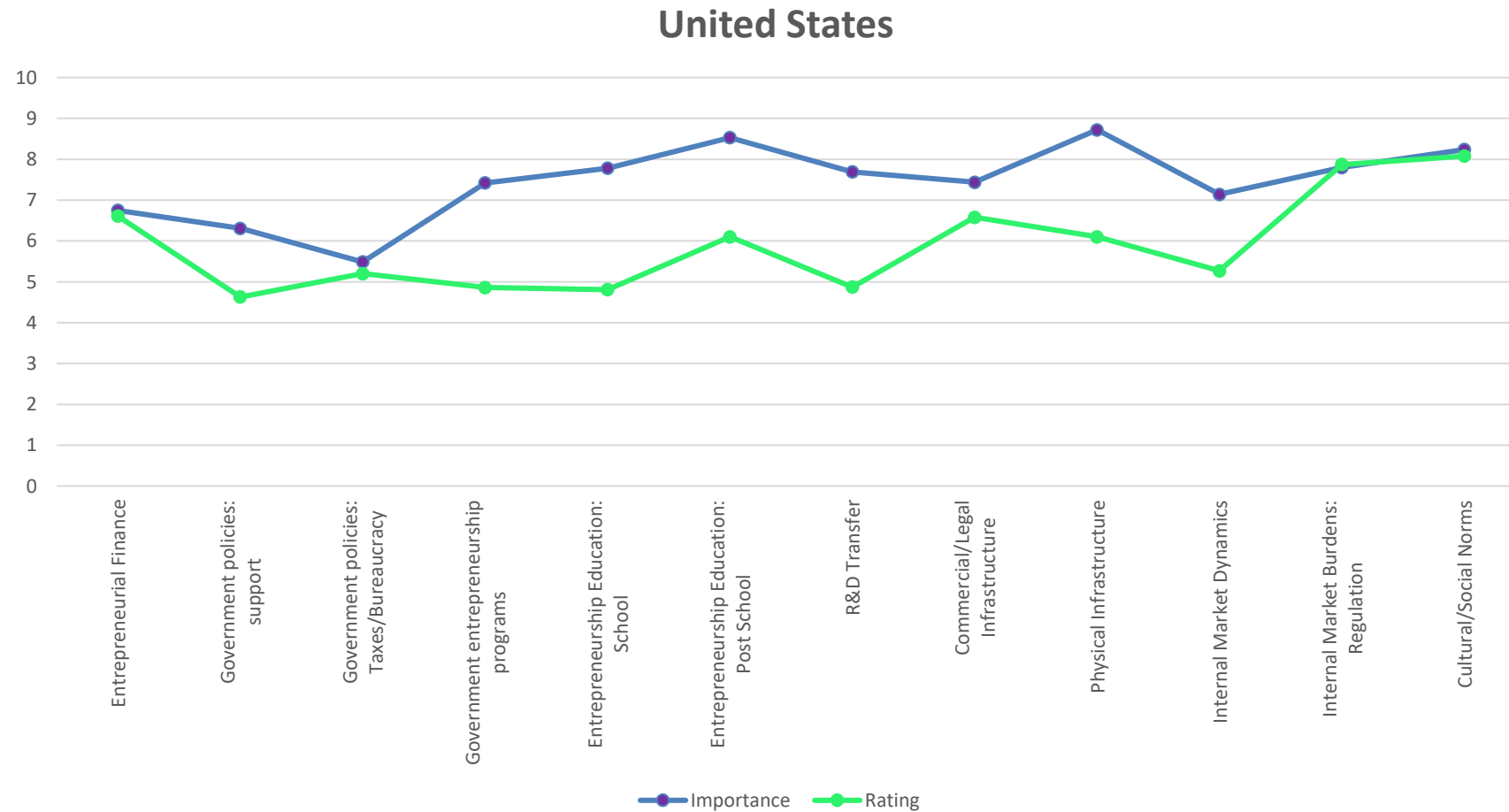
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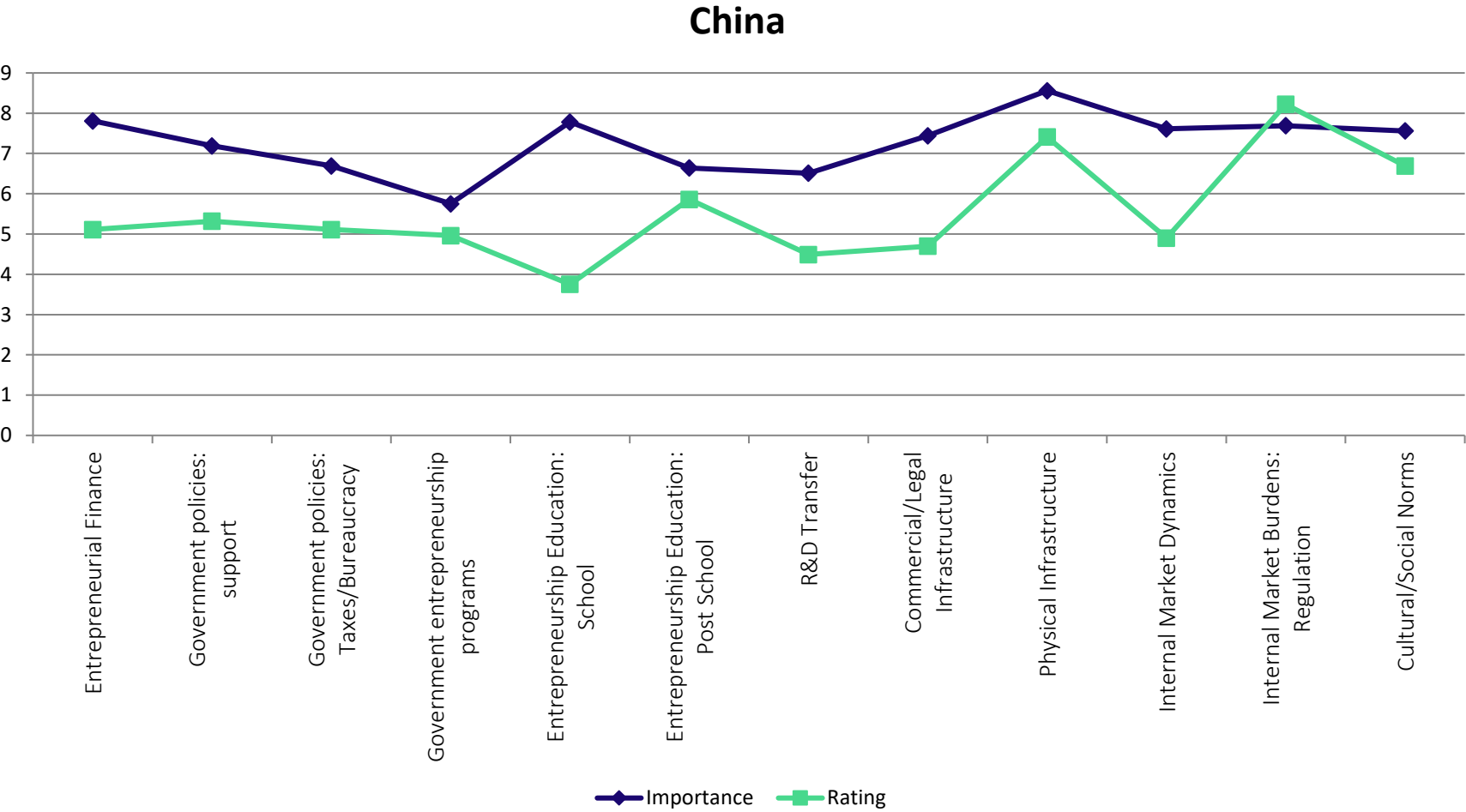
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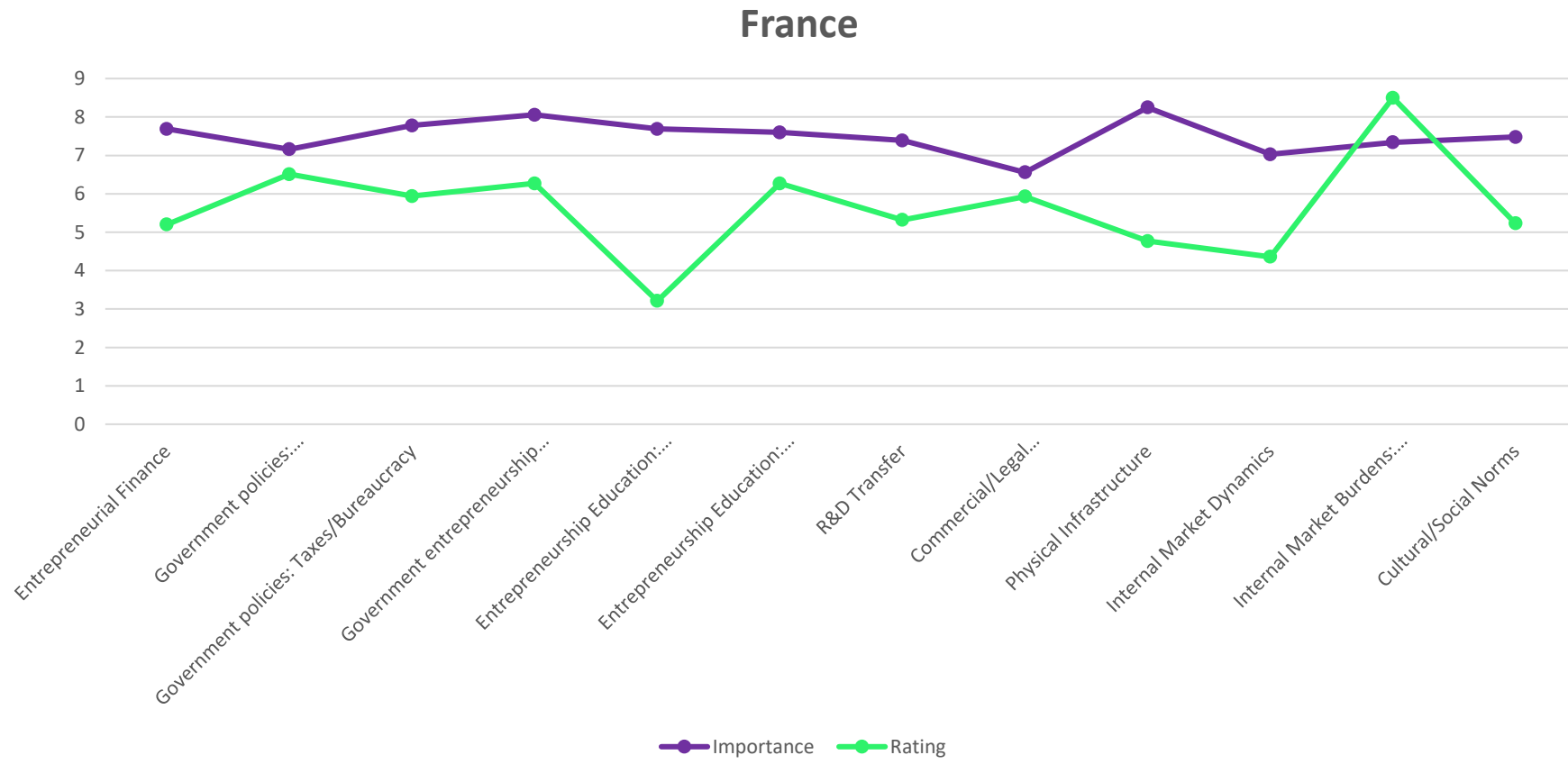
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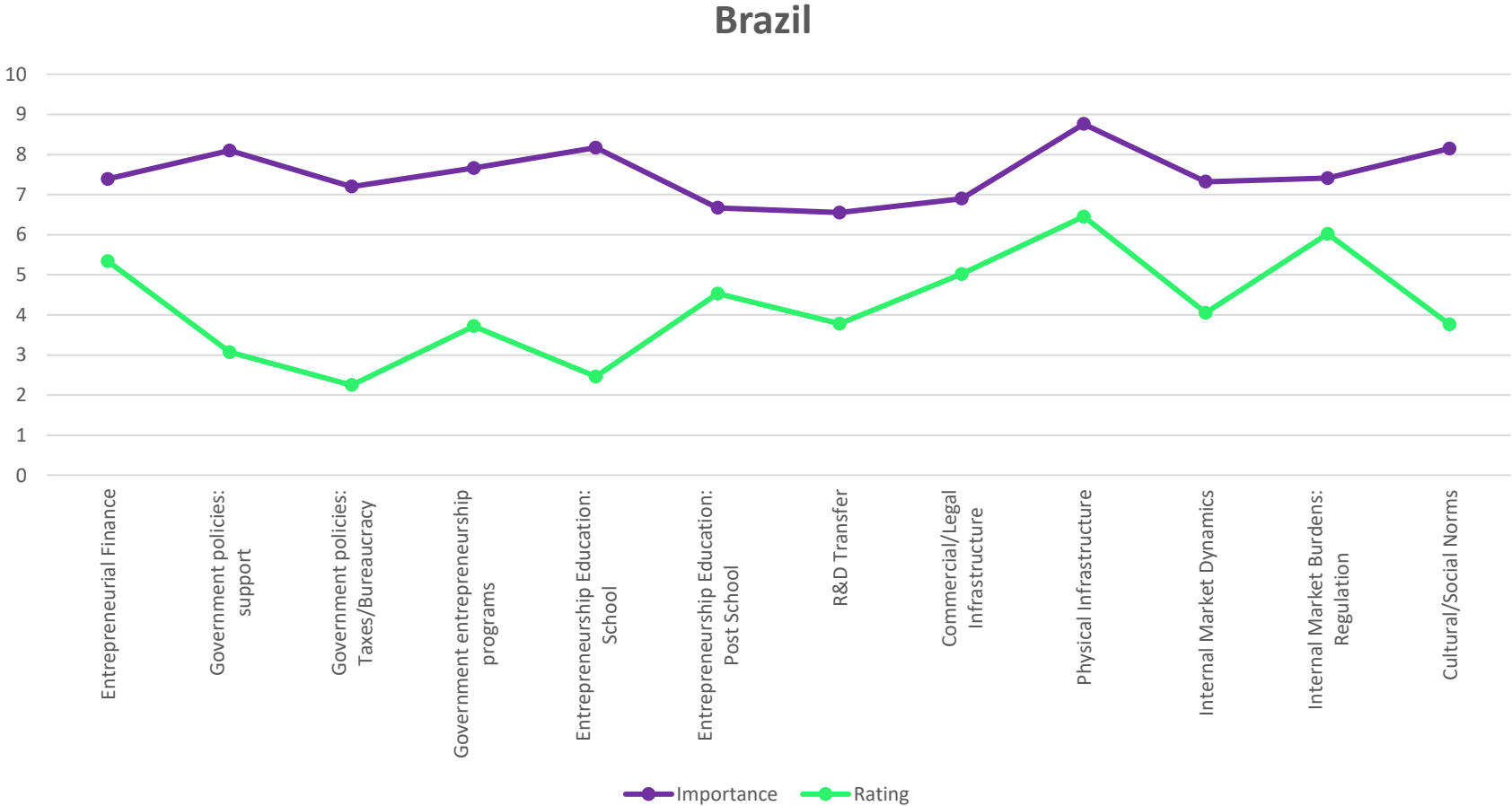
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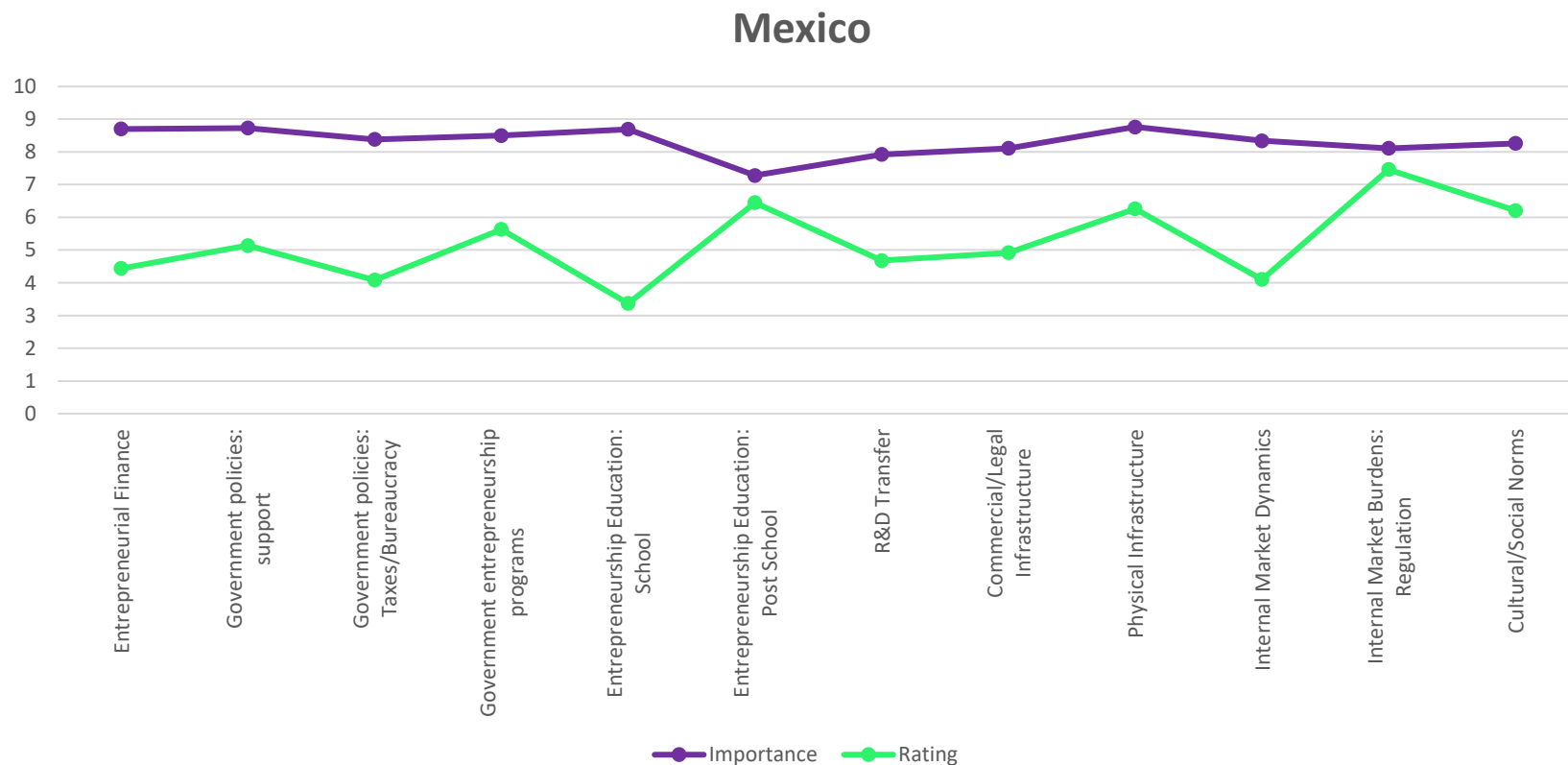
4. G20经济体创业环境框架条件得分和重要程度差异较大的经济体

The economies with gaps between experts' ratings and the importance values of entrepreneurship framework conditions in G20 economies



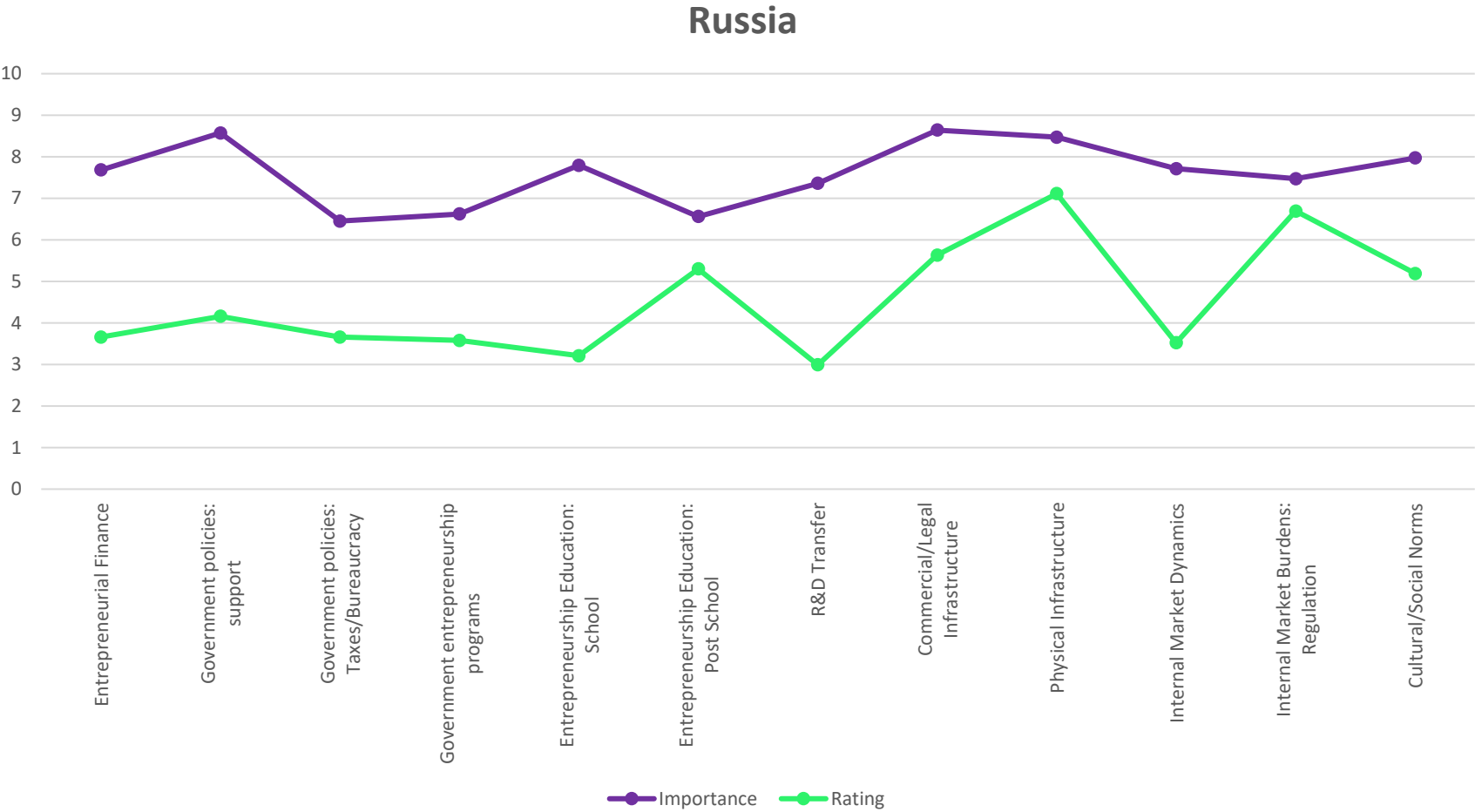
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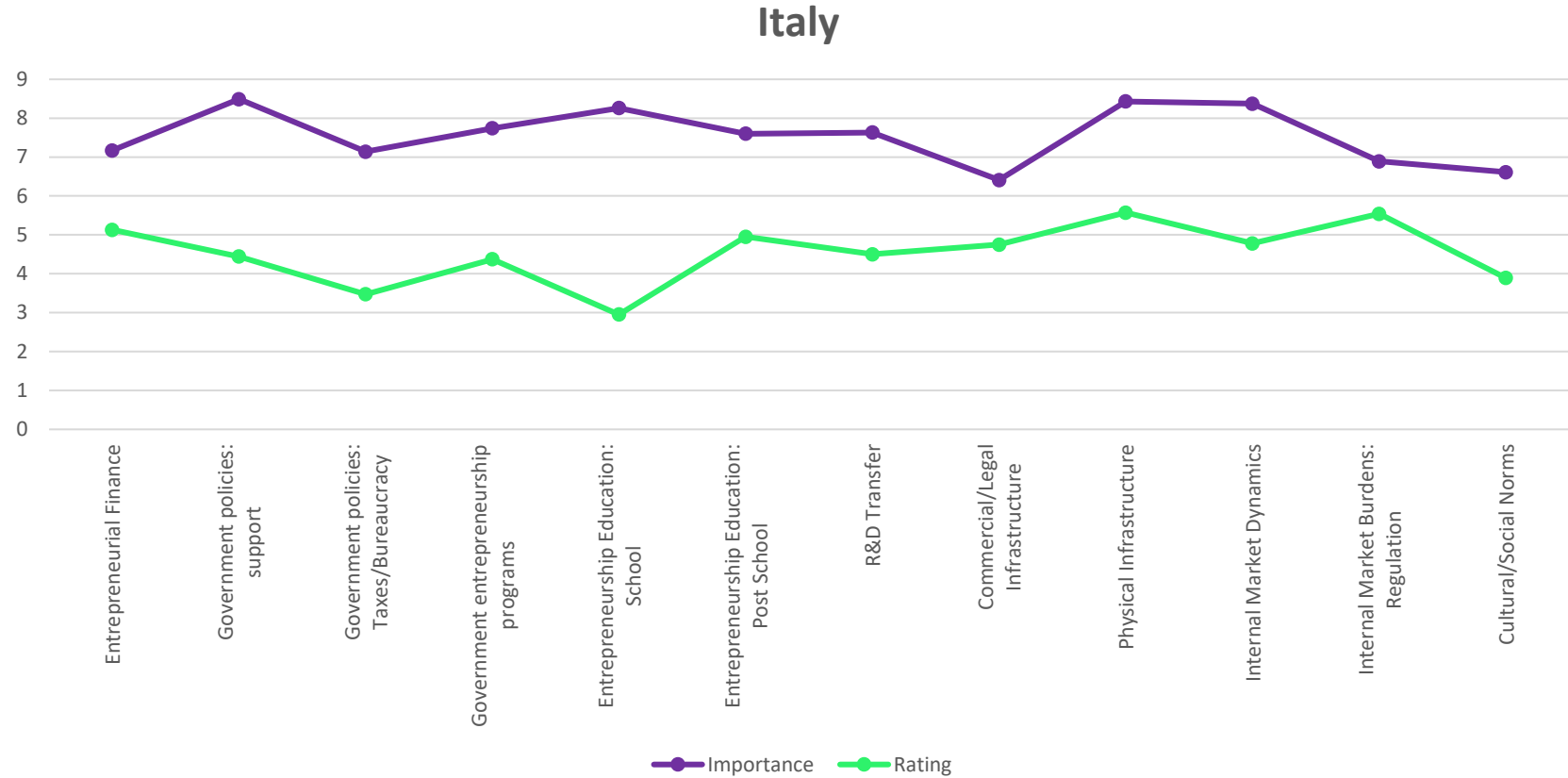
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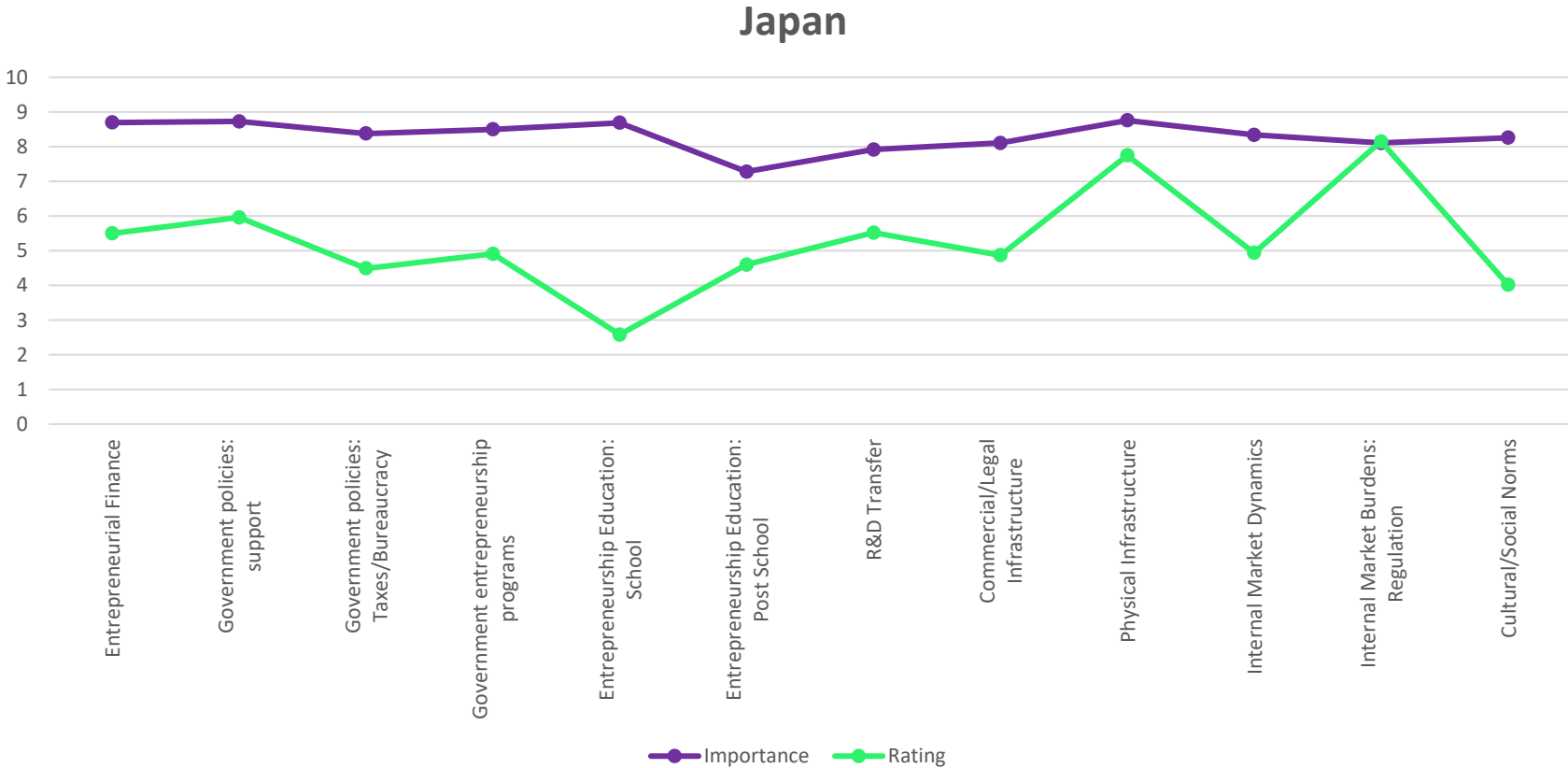
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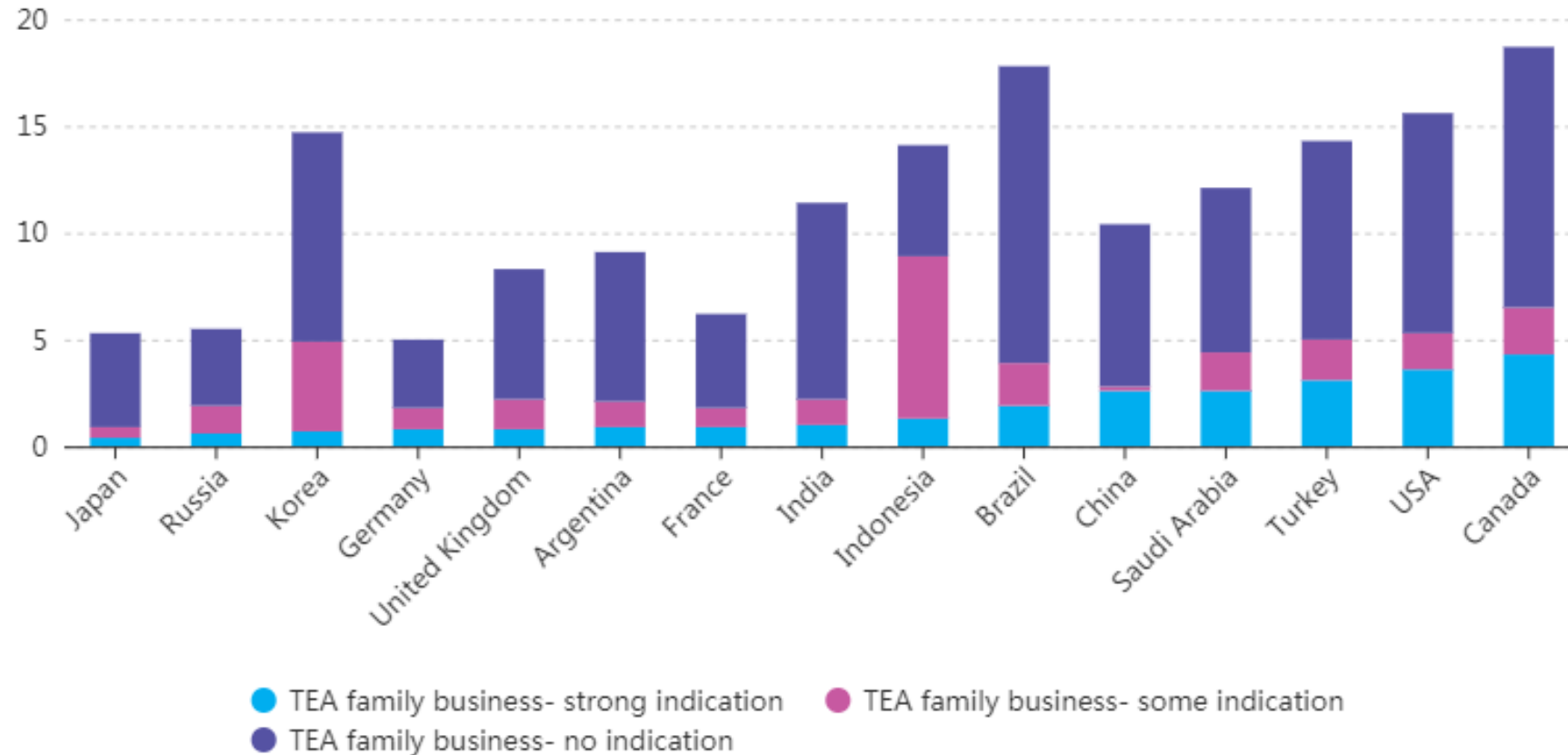


五、 G20经济体创业活动的特征

5. The characteristics of entrepreneurship in G20 economies

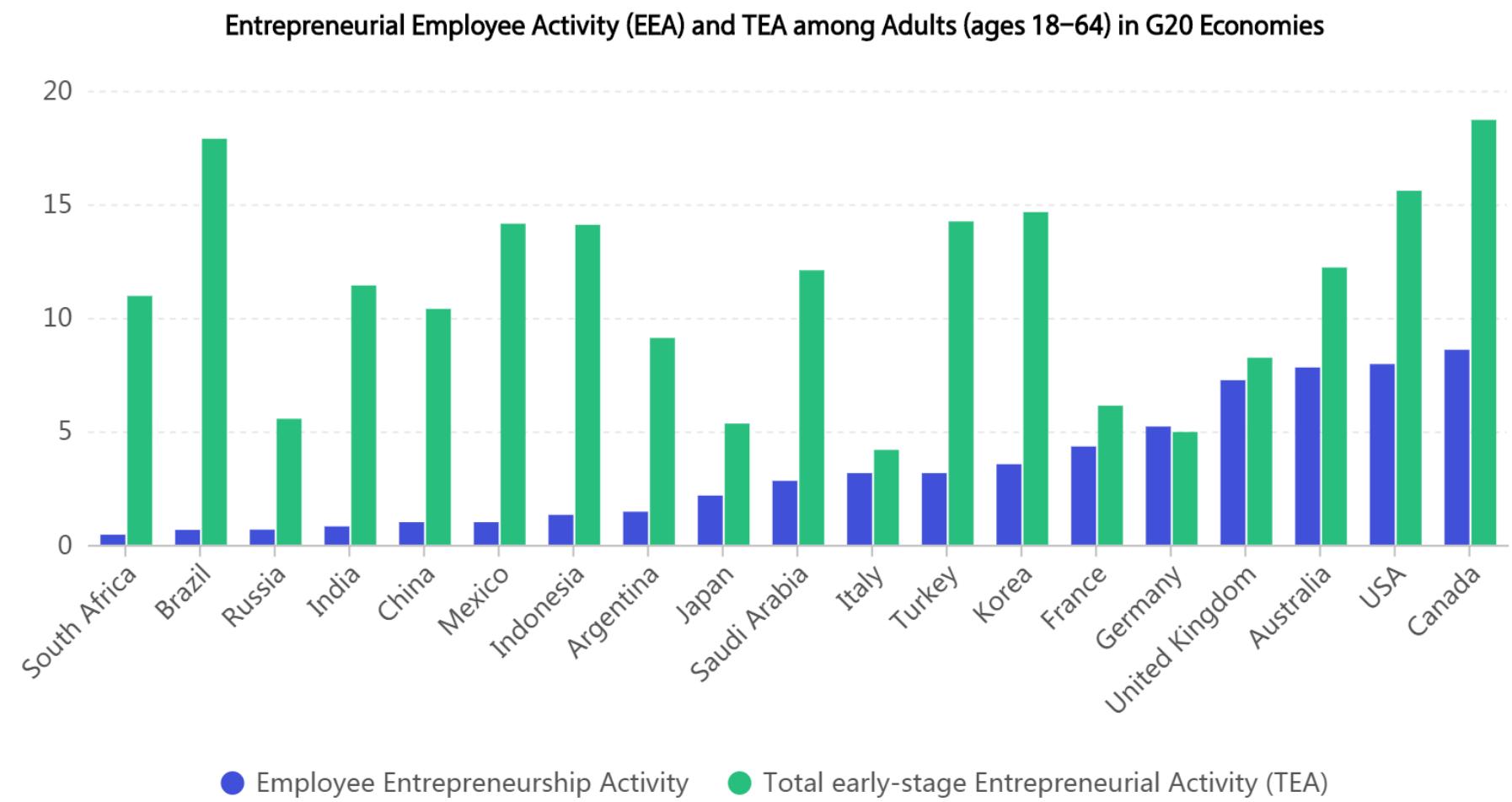
1. 家庭创业（FAMILY-BASED ENTREPRENEURSHIP）

Total early-stage Entrepreneurial Activity (TEA) Rates among Adults (ages 18–64) in G20 Economies, Showing the Proportion of Family-owned or Managed

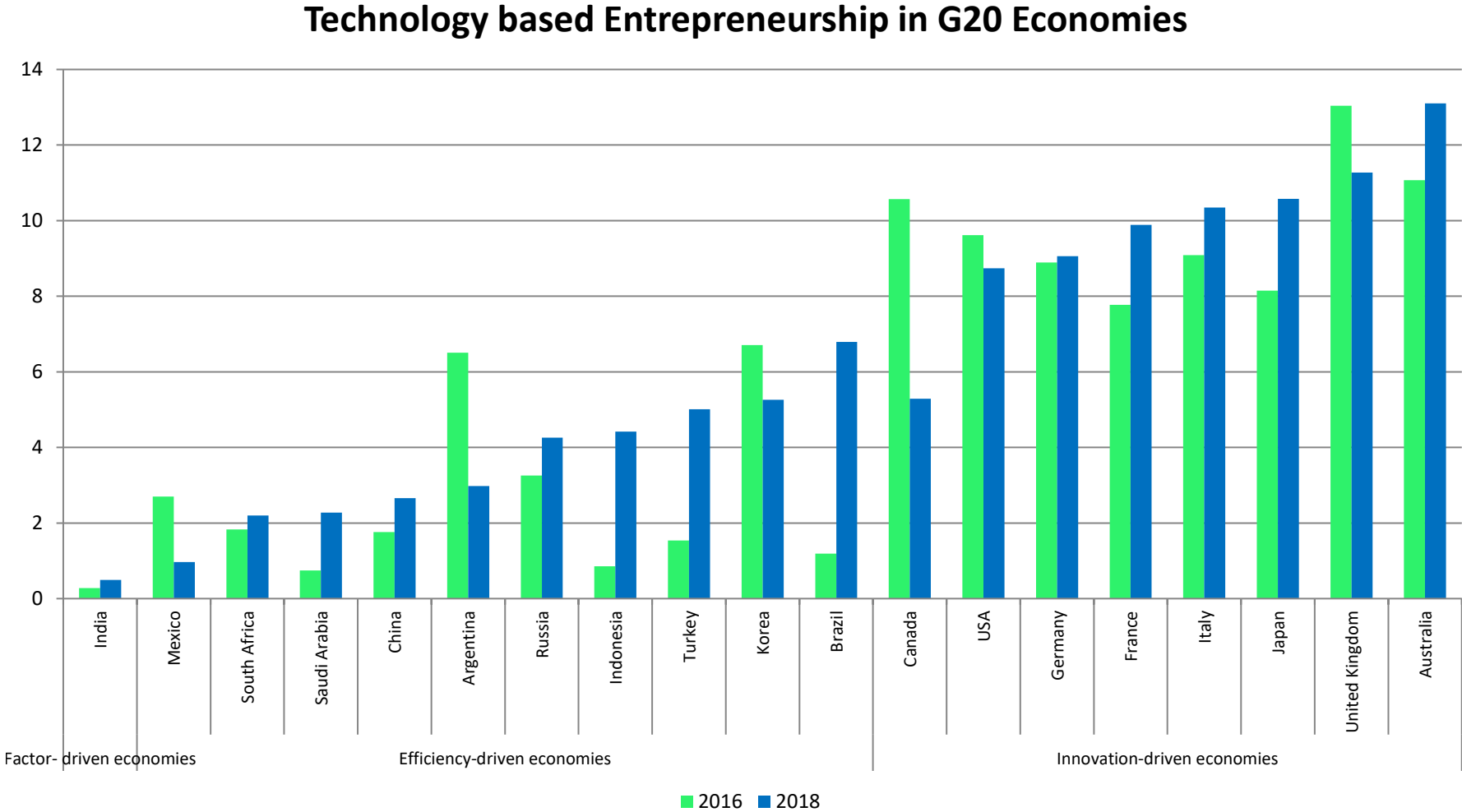


GEM adopts a broad definition of family-based entrepreneurship, including entrepreneurs involved in TEA who: (i) report to (expect to) be partly owning and managing their business jointly with family members, or (ii) do not share ownership but have at least one employee and manage their business jointly with family members. GEM identifies the former as ‘strong indication’ of family-based entrepreneurship and the latter as ‘some indication’ of family-based entrepreneurship.

2. 员工内部创业（ENTREPRENEURIAL EMPLOYEE ACTIVITY）

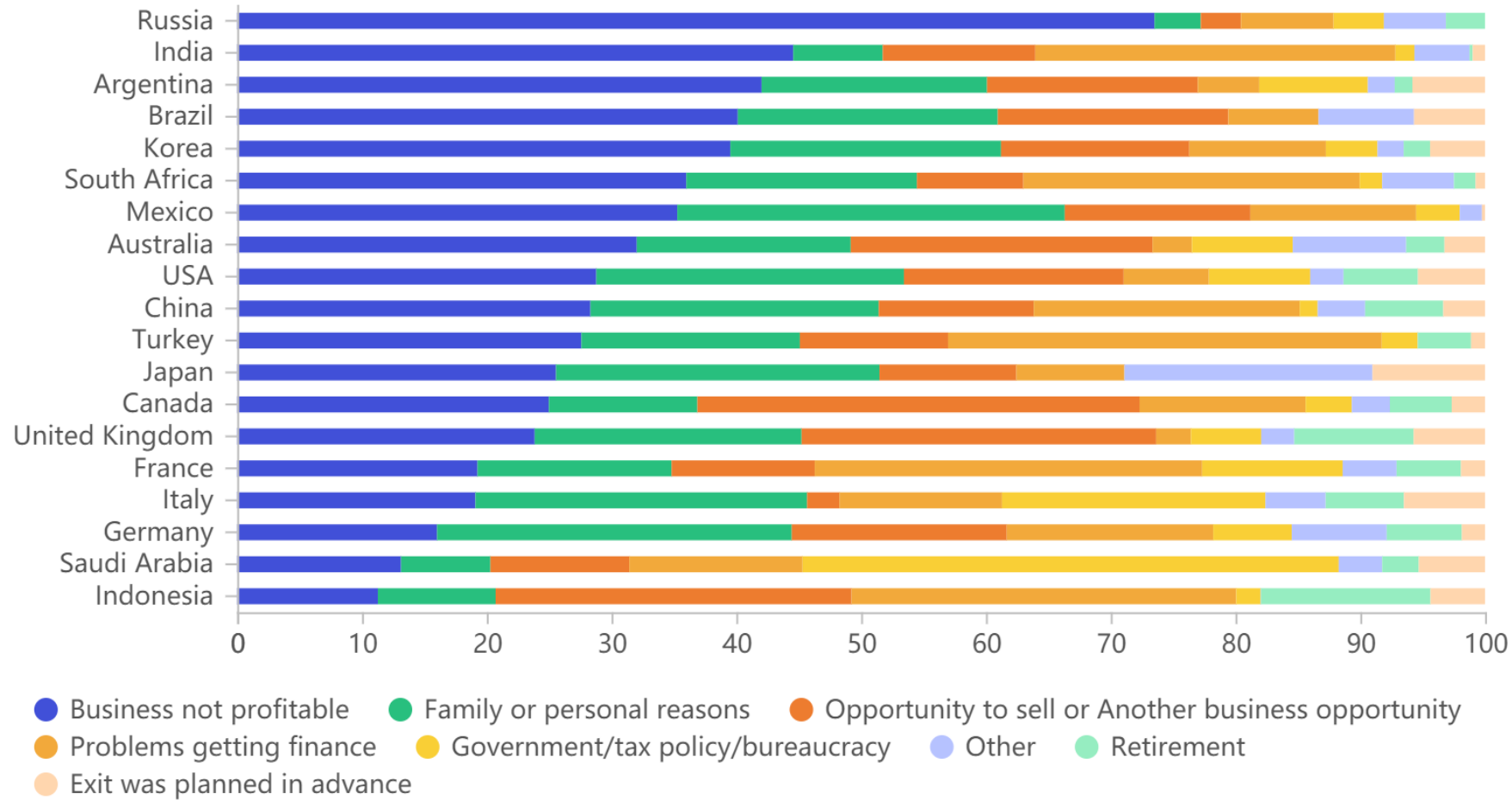


3. 技术创业(Technology Entrepreneurship)

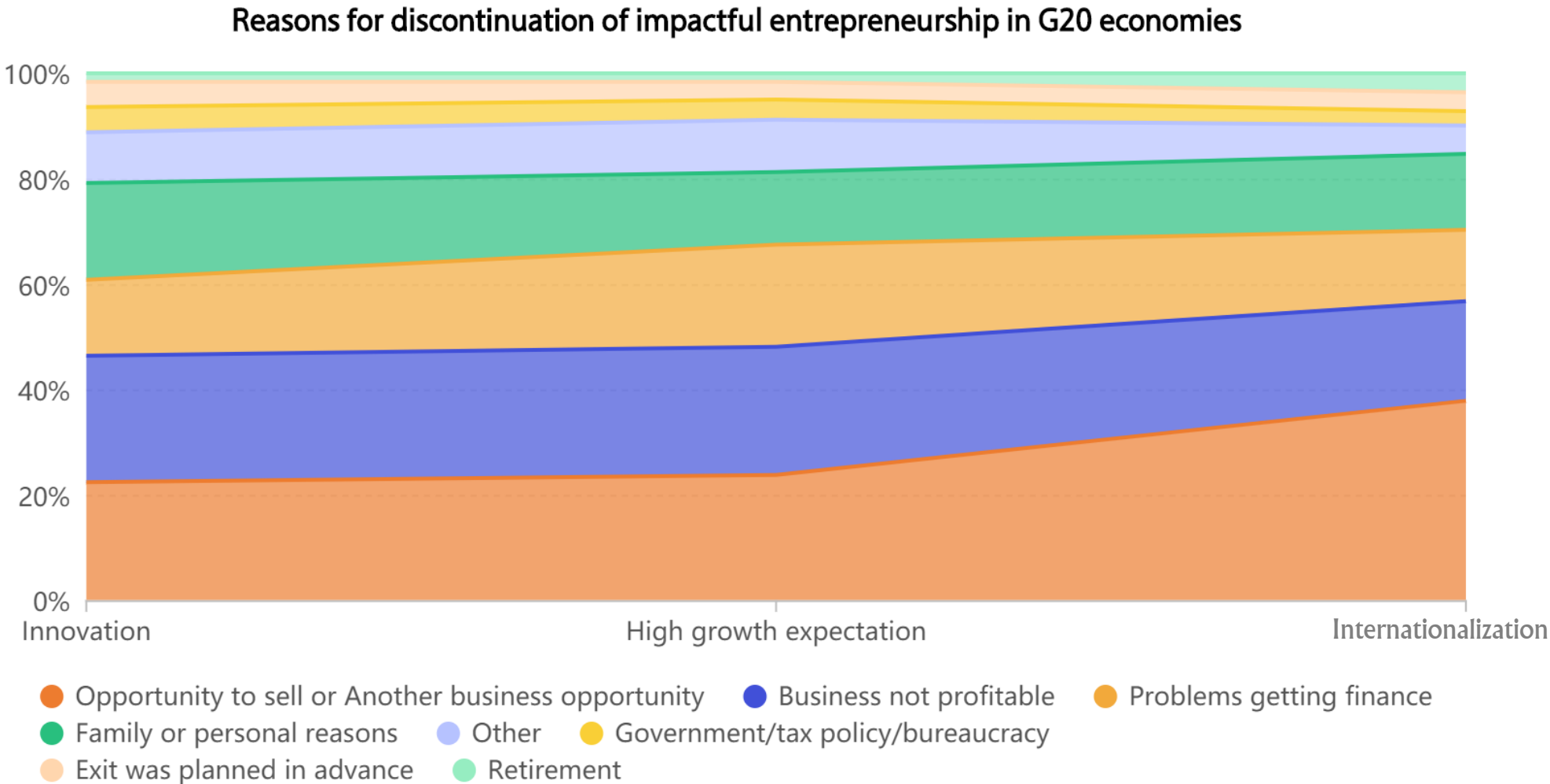


% within TEA: Active in technology sectors (high or medium)

4. 终止创业的原因(Reasons for Discontinuation of business)



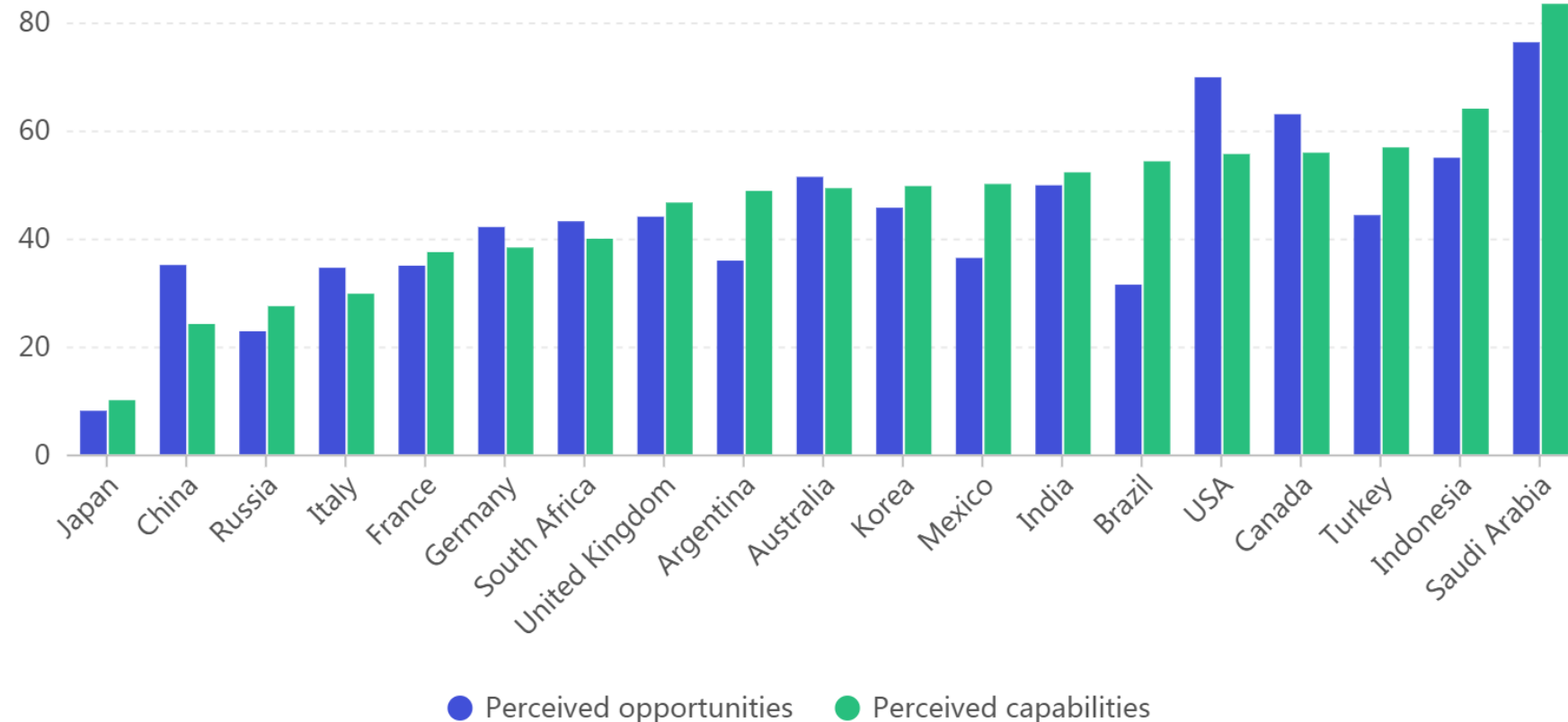
4. G20经济体高质量创业活动终止的原因(Reasons for discontinuation of impactful entrepreneurship in G20 economies)



5. 创业个人感知（机会识别与创业能力）

Self-perceptions about opportunities and capabilities for entrepreneurship

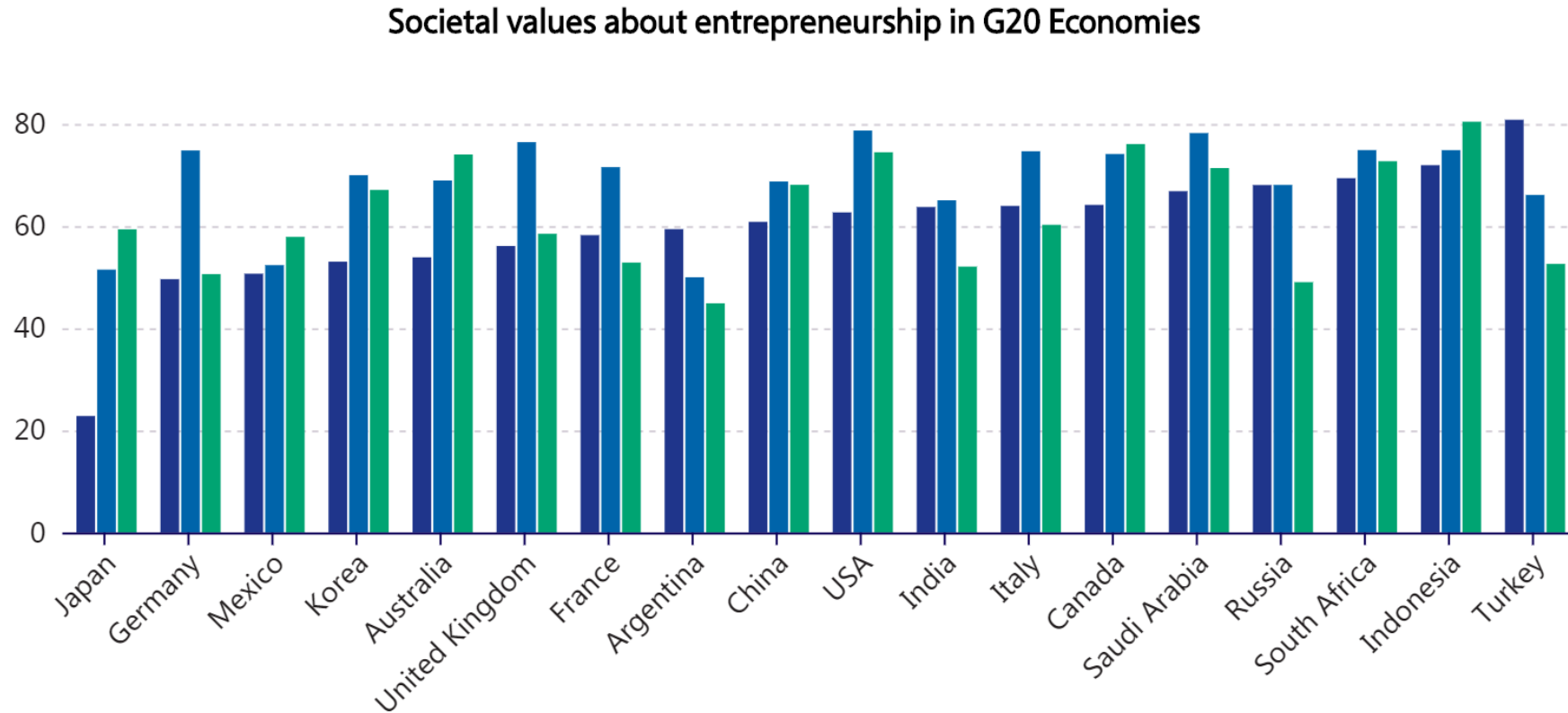
Self-perceptions about Opportunities and Capabilities for Entrepreneurship among Adults (ages 18–64) in G20 Economies



Perceived capabilities on TEA, 0.658** sig 0.002

The self perceptions on entrepreneurial capabilities are positively related to the Total early-stage entrepreneurship activities in G20 economies. However, people in one economy may have a different image of what 'a business' entails compared to other economies. Some developed economies indicate that people consider there are opportunities to start up but they do not have adequate capabilities.

6. 创业社会感知(Societal values towards entrepreneurship)



- Entrepreneurship as a good career choice (% of 18-64)
- High status to successful entrepreneurs (% of 18-64)
- Media Attention for Entrepreneurship

Entrepreneurship as a good career choice on perceived opportunities, 0.534* sig 0.04

High status to successful entrepreneurs on perceived opportunities, 0.660** sig 0.007

Media attention for entrepreneurship on perceived opportunities, 0.596* sig 0.019

Most G20 economies recognized that entrepreneurship represent a good career and the successful entrepreneurs are admired in a society. In the same time, the societal values towards entrepreneurship also has a positive relation with the perceived opportunities by the individuals.

谢谢！

Thank you!