2022

2023

Online Survey of Micro-and-small Enterprises (OSOME): Quarterly Report (2022Q4) and Confidence Index (2023Q1)

Center for Enterprise Research, Peking University

Eiversity

2.5 2020

-2.5% 2.4

22.1% 16.0%

6

19.2%

3 2022

4

2023 1

2022

2023 **2023**

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1. 53
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4. 56
2022 2023 59
1. 59
2. 60
3. 63
2023 9 8 2023 67
1. 2023 67
2. 6 68
3. 68
.....70
2022 70
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2022 12 19 30

[2] 6,076

2022

2023 1

2023 1 30 2 3

5176

2020 9

[3]

“

”(Enterprise Survey for Innovation and Entrepreneurship in China ESIEC)[4]

` Θ ↴ ESIna020

1.

2022 11.2 13.6
17.7% 13.3%
42.7% 2.5
“ ”
34.7 35.6 2.4%
11.9 4.9
12% 29.7% 2022 2021
12.9 13.3%
5.4% 3.0%
31.1%
-2.5% 2021
2020
0.7% 3.2
2021 5
-3.4% -1.9%
-1.9%
3.9 2.7
2022 -0.8% 2.6

2.

2022
2.4 2 2022Q3 2.7
2021
2.7 0.3
0 3
2022 16.0%
3 22.1%
11.1 19.2% 6
3.4

2.5

2.7 1

27.6%

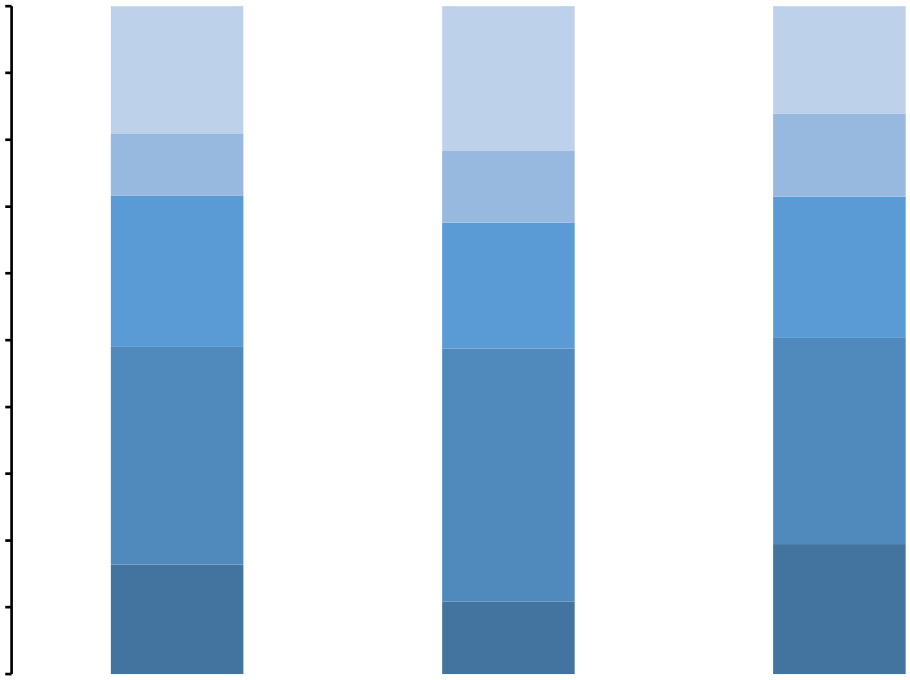
2

	2021Q1	2021Q2	2021Q3	2021Q4	2022Q1	2022Q2	2022Q3	2022Q4
	2.6	3.0	2.9	2.7	2.4	2.6	2.7	2.4
	2.6	2.9	2.9	2.7	2.4	2.4	2.5	2.2
	2.6	3.1	3.0	2.6	2.3	2.7	2.8	2.5
	2.7	3.1	3.0	2.7	2.5	2.7	2.9	2.7

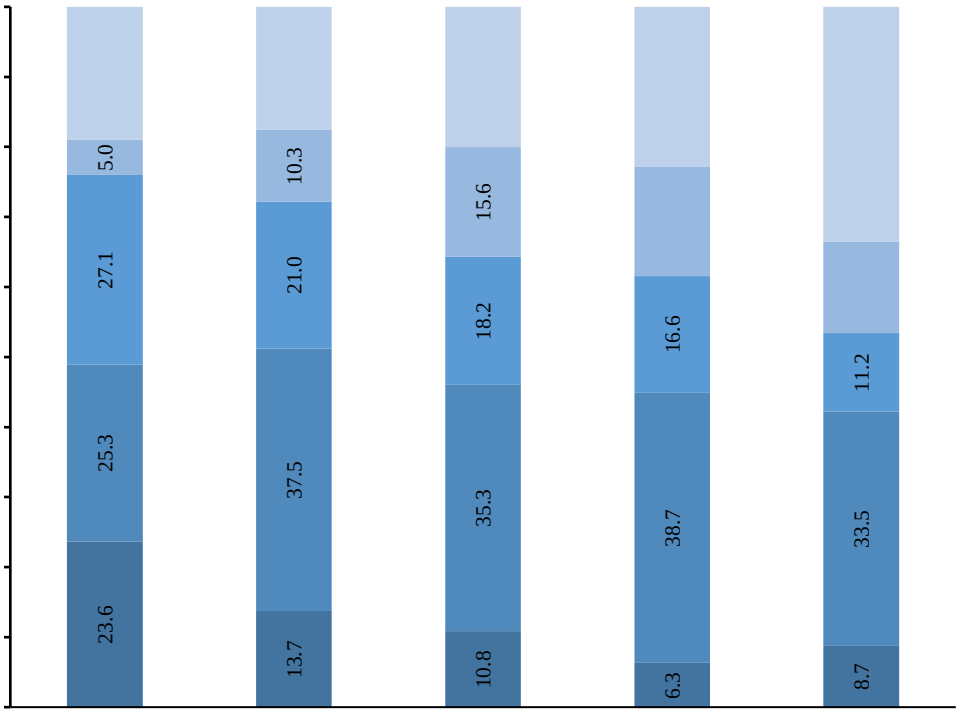
3 %

	2021Q2	2021Q3	2021Q4	2022Q1	2022Q2	2022Q3	2022Q4
0					13.6	13.1	16.0
1	23.6	25.5	33.2	38.2	33.9	33.2	22.1

2 2.4
2.7
2.7
2.3 2.7
3
20 3.4 1 4
2.4
2.0



2 2022


23.6
25.3
27.1
5.0
13.7
37.5
21.0
10.3
10.8
35.3
18.2
15.6
6.3
38.7
16.6
8.7
33.5
11.2

3 2022

1.

2022

4 4

30.9% 42.6f (30.9)Tj (

E ä5 :[ƒ ?] Á Ñ ›$Æ –" ´ % µ

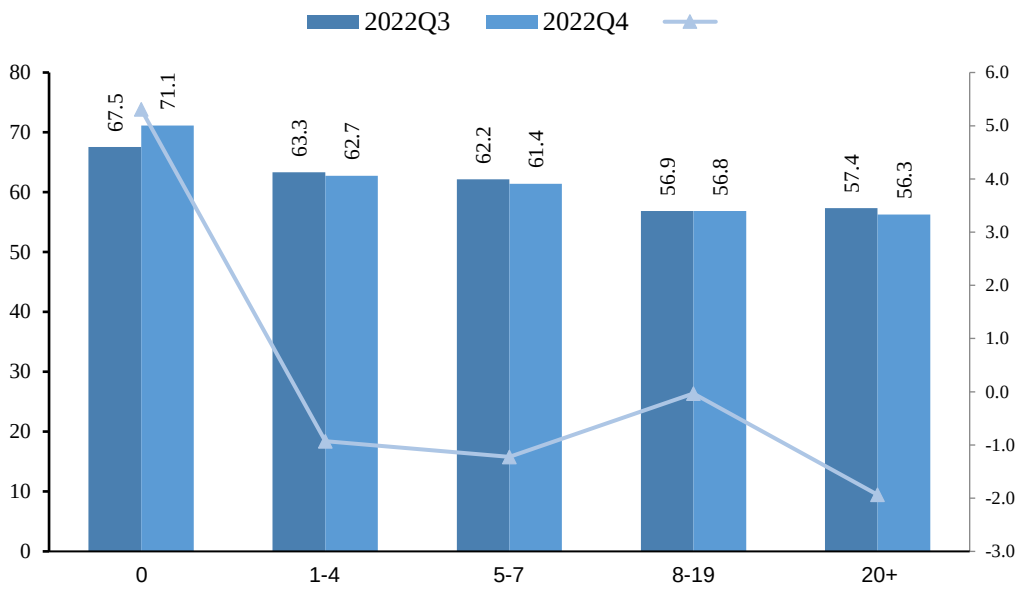
2022

40.8% 25.5%

M˜ j,º q?· Á Ñ ›$Æ –" ´ % µ <>, P

6

7 2022



4 9 2022 ª ™ Ü q?ø0DCoCU û L Æ < ð Ž?ú W

1.

“ - ”

10

10 2022 2022

3.35 2.89

“ ” 21.8% 12.0% 9.8

“ ” 74.0% 61.9% 12.1

4 10 2022 ª ? ™ Ü Â ™ Ü E ä5 :[6; nG® ö#• p Ü

11 2022

“ ”

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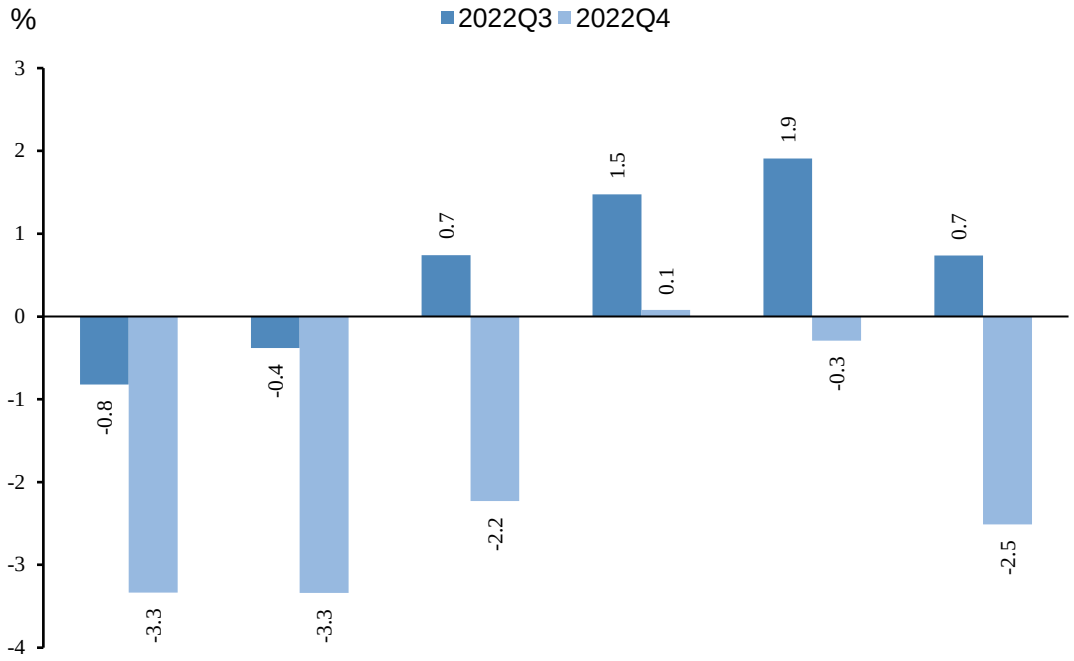
10 “ * ” “ ”

“ ”“ 8 ” 1 “ 7 ” 2 “ 3 ” 3 “ 2

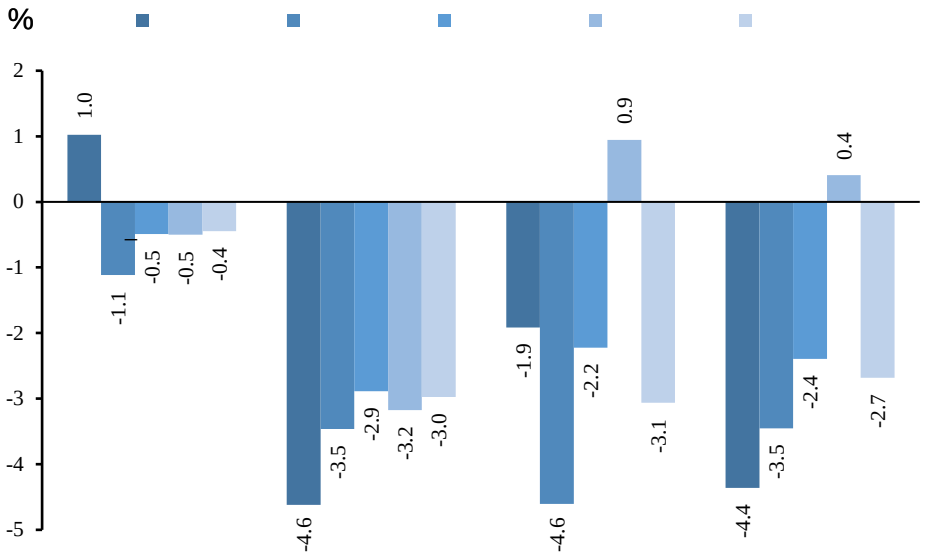
” 4 “ ” 5



4 11 2022 ª ? ™ Ü = ™ Ü C BLh Ý u1Œ [r0A Ü A,º _#Ü)½

12 “

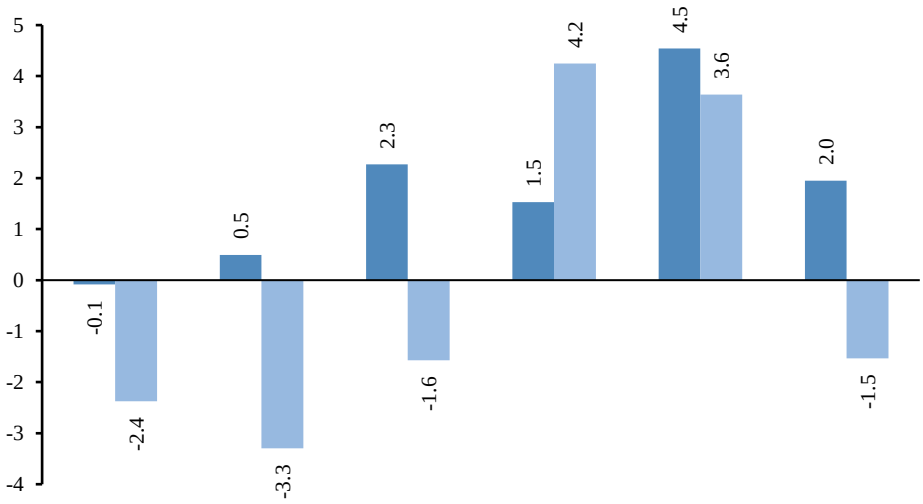
”



4 12 2022 ª ™ Ü C BLh Ý u1Œ [r0A Ü A,º _#Ü)½ ¸ < >, P

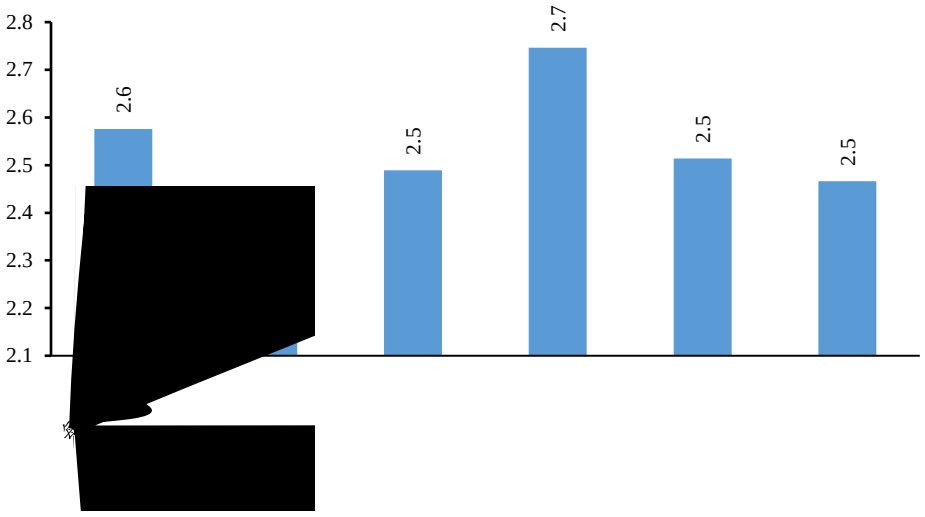
13- 17

2022 2022



4 15 2022 1b ? =1b ™ Ü C B u1Œ Ą° 7 P _#Ü)½ÆLý Ž ð ¦ p 5-7 ð

4 16 2022 1b ? =1b ™ Ü C B u1Œ A,° 7 P _#Ü)½ÆLý Ž ð ¦ p 8-19 ð



4 19 Lh Ý u1Œ [r0A Ü Â)æH #w %5* 7 > ¦

20

8

3 0

4 20 2022 ª ™ Ü 6L ,Kµ D)æH #w5* 7 ,L*

2.6

2.2

2.8 25%

2.5 75% 2.2

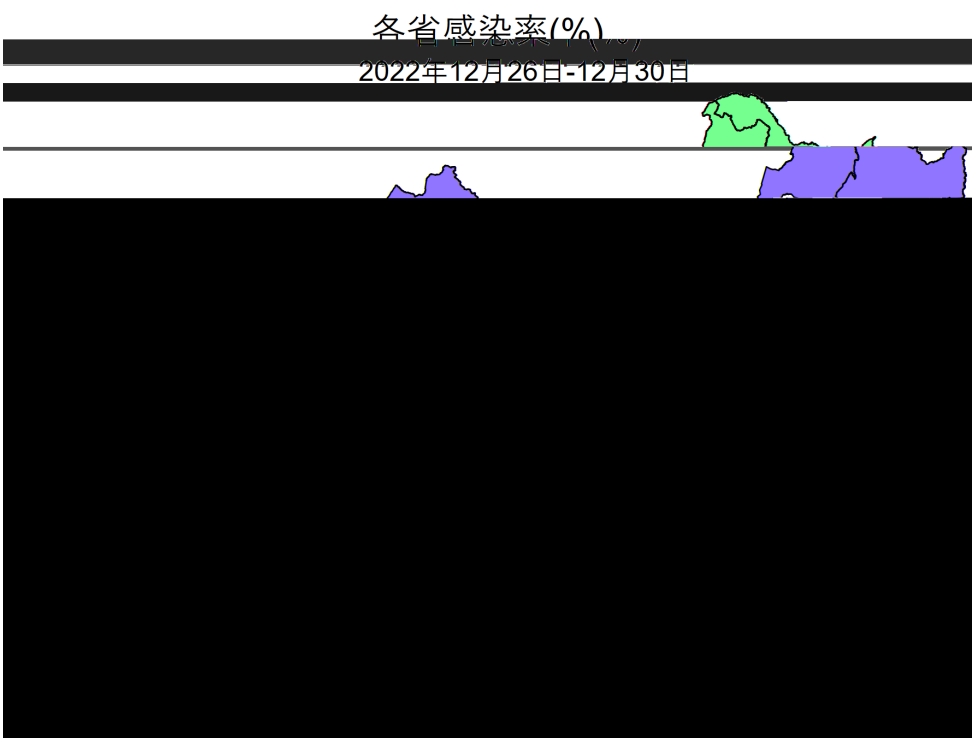
2.

12 2022 12

2023 1

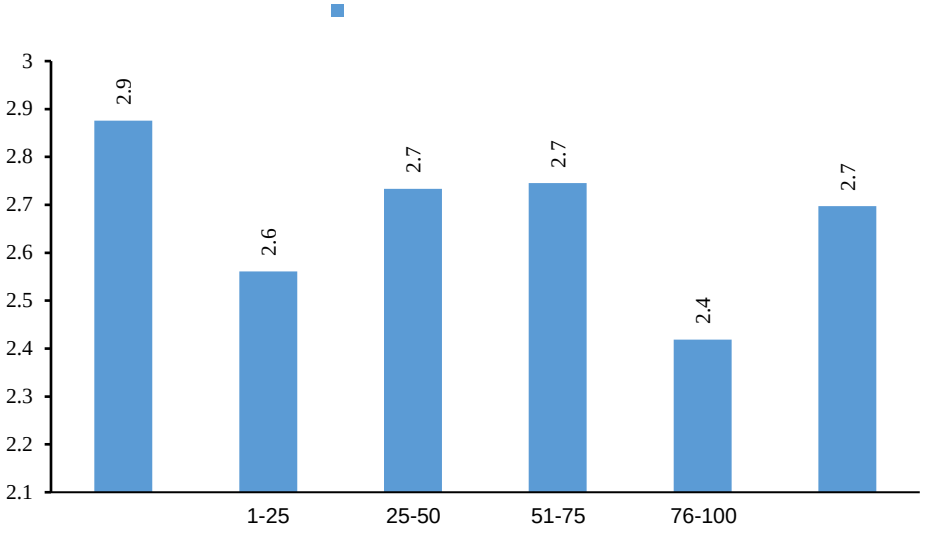
21- 23

4 21 :-7 æ Ö+û" U)½ Æ 2022 ª 12 > 19 -12 > 23



4 22 :-7 æ Ö+û" U)½ Æ 2022 ª 12 > 26 -12 > 30

4 23 :-7 æ Ö+û" U)½ Æ 2023 ª 1 > 30 -2 > 3



4 26 U " Á D)æH #w5* 7 û ë

4 27 U " Á D5 :[,º Á Ñ ^ û ë

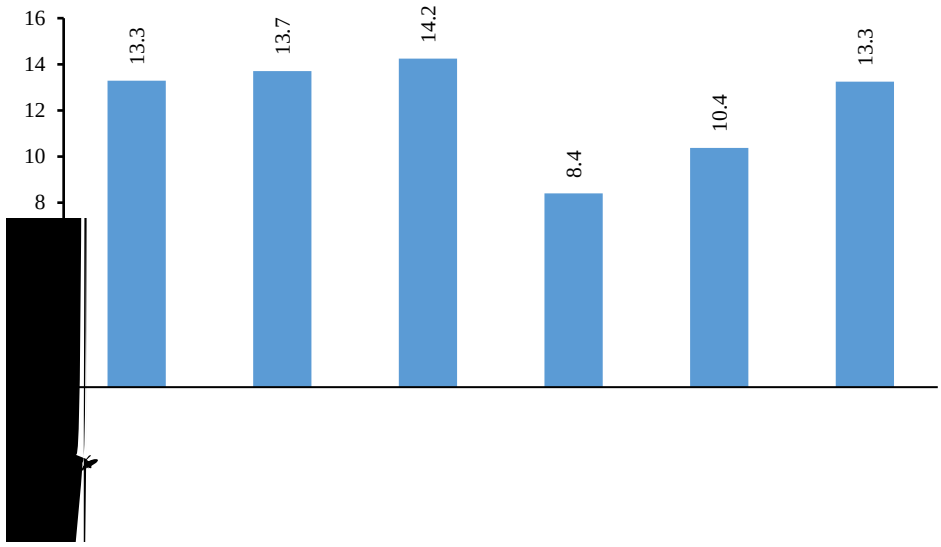
28

“ ” “ U ”

“ U ”

4 30 f p U " Á Â 6L 8 ž @ 7 P –"

4 31 f p U " Á Â)æH #w %5* 7 > ¦

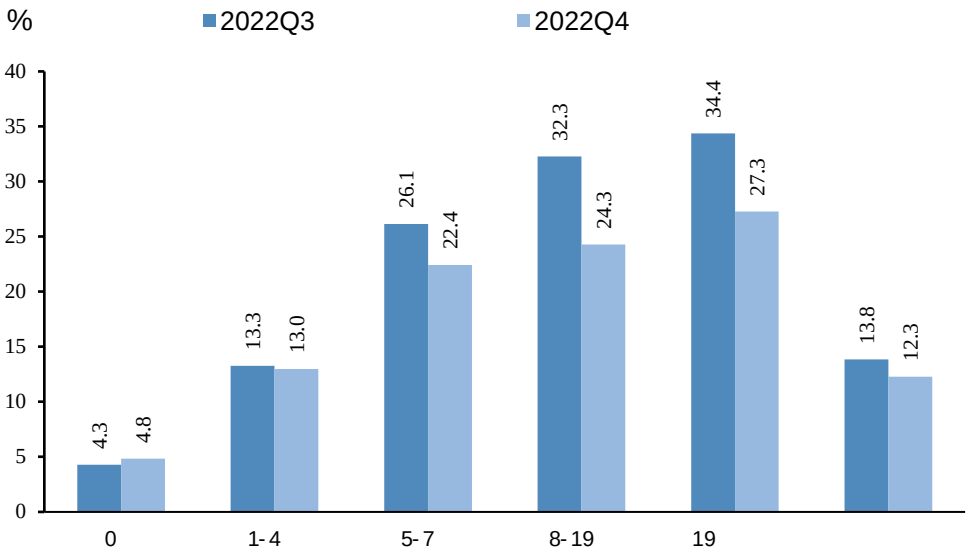


4 37 2022Q4 F >,>÷ Ž Â+á ûLh Ý u1Œ ©31

2022

38 39

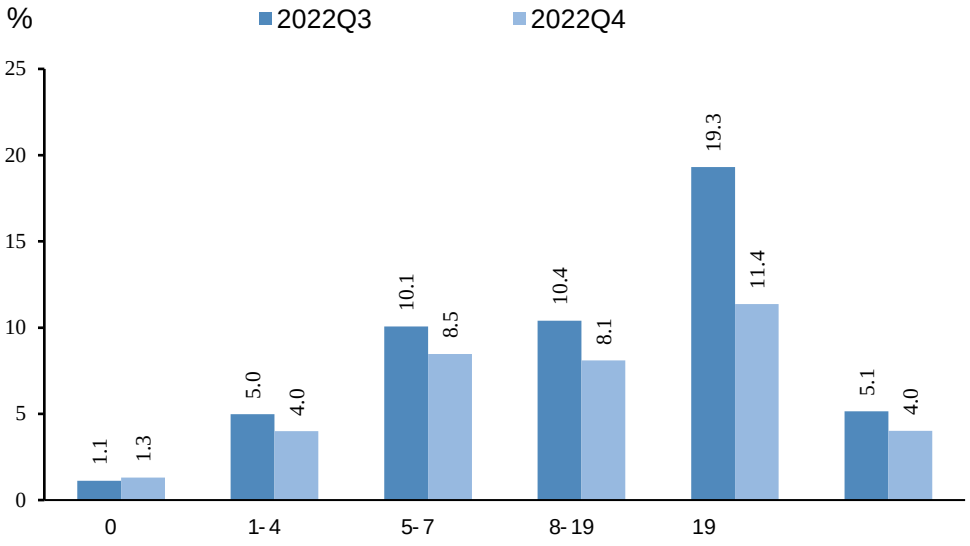
4 38 2022 ª ? ™ Ü Â ™ ÜLý ™ * P ž6, ð Ž û ë Æ <5 :[?ú W



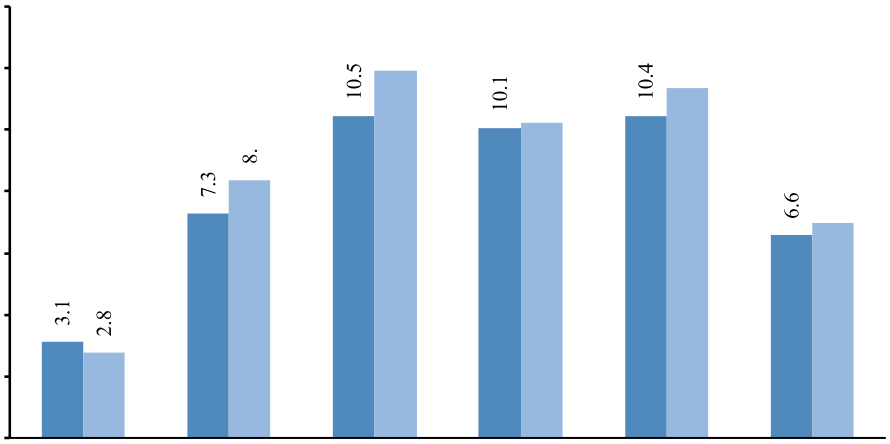
4 39 2022 ª ? ™ Ü Â ™ ÜLý ™ * P&«#q g P ð Ž û ë Æ <5 :[?ú W

40 41

42



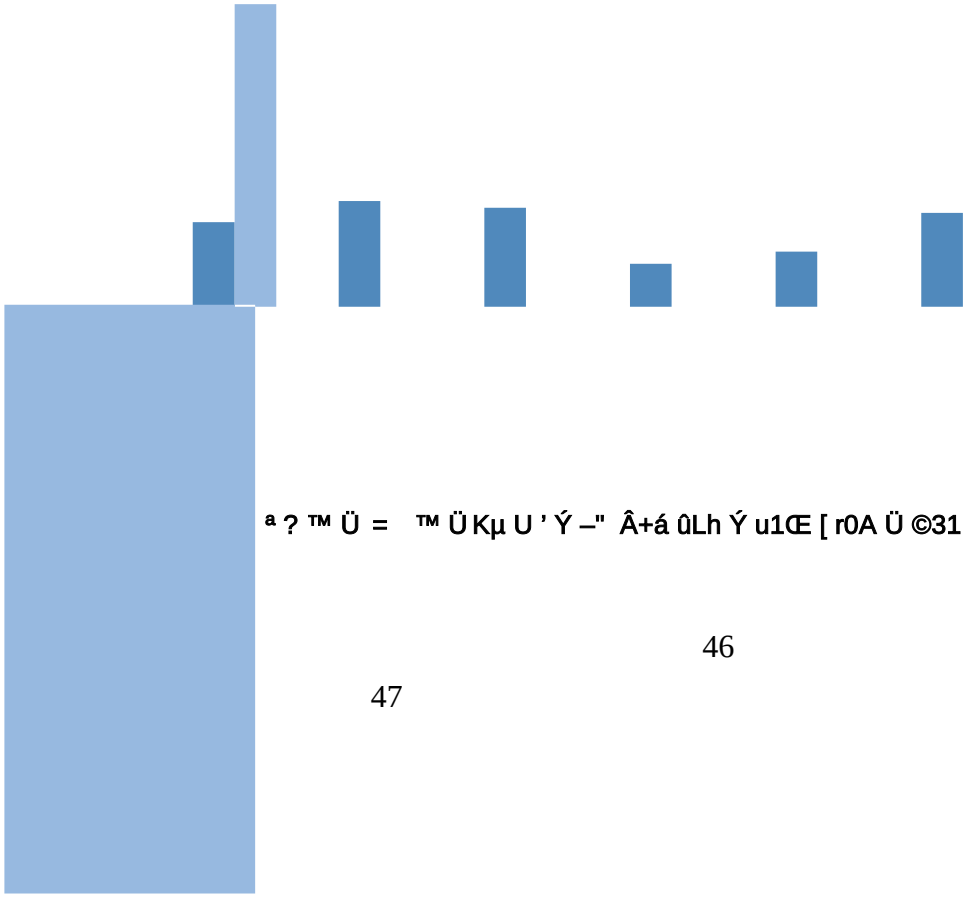
4 40 2022 ª ? ™ Ü Â ™ Ü Ô Ö Cz 7 P –" û ë Æ <5 :[?ú W



4 41 Lƒ „ Cz 7 P –" Â 7 P?ú W ©31

4 42 Lƒ „ / Ô Ö Cz –" Â+á ûLh Ý [r0A Ü ©31

43- 45 2022



ª ? ™ Ü = ™ Ü Kµ U ’ Ý –" Â+á ûLh Ý u1Œ [r0A Ü ©31

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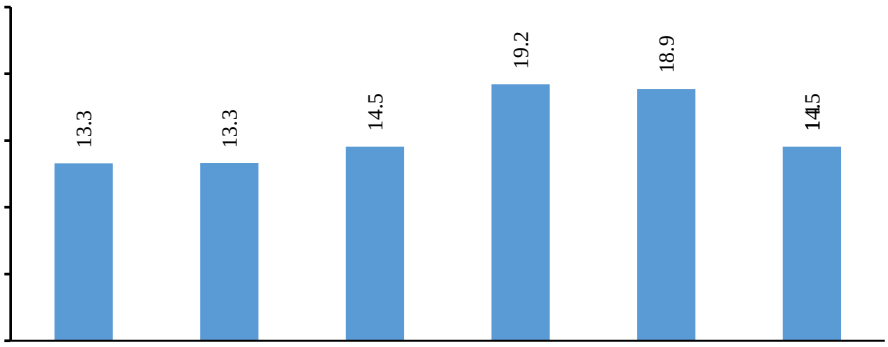
4 46 2022 ª ? ™ Ü = ™ Ü #Þ - –" Â 7 P?ú W ©31

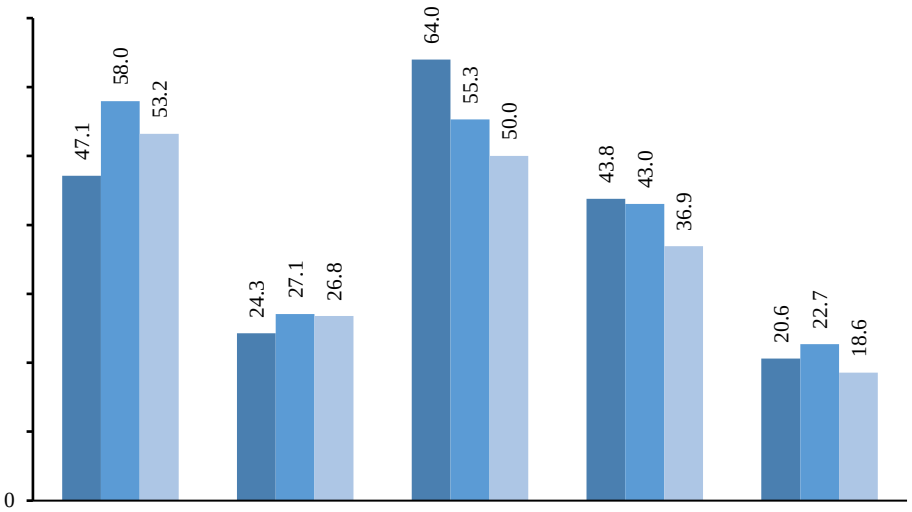


4 51 2022 ª ™ Ü 6 æ 8 p –" ÂLh Ý u1Œ [r0A Ü ©31

56

53.2%

50.0%



56

“ ”

57

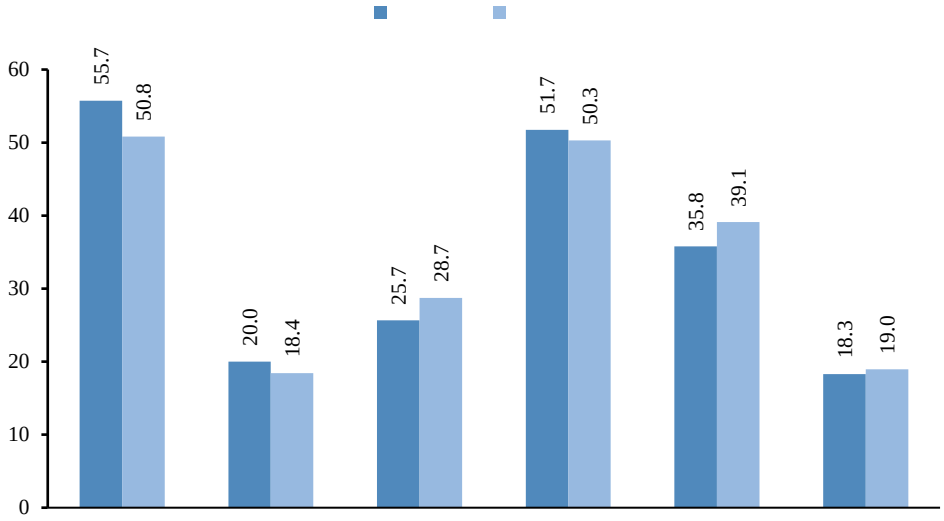
57

3.

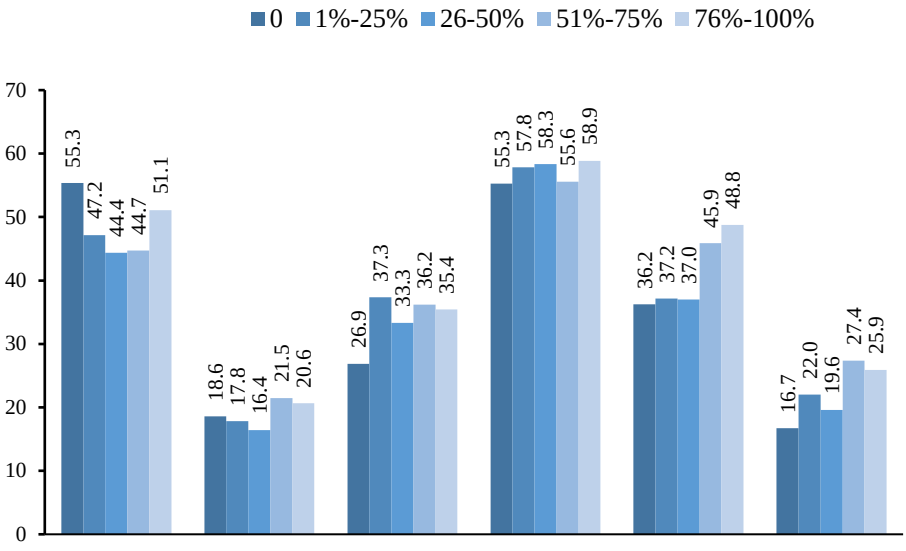
58

4 58 E ä5 :[6;,º u1ŒAÿ"x ¸ < f p nG®NÇ!W

59



4 59 E ä5 :[6;,º u1ŒAÿ"x ¸ <5 :[6; e \ U



4 60 E ä5 :[6;,º u1ŒAÿ"x ¸ < Ž U)½

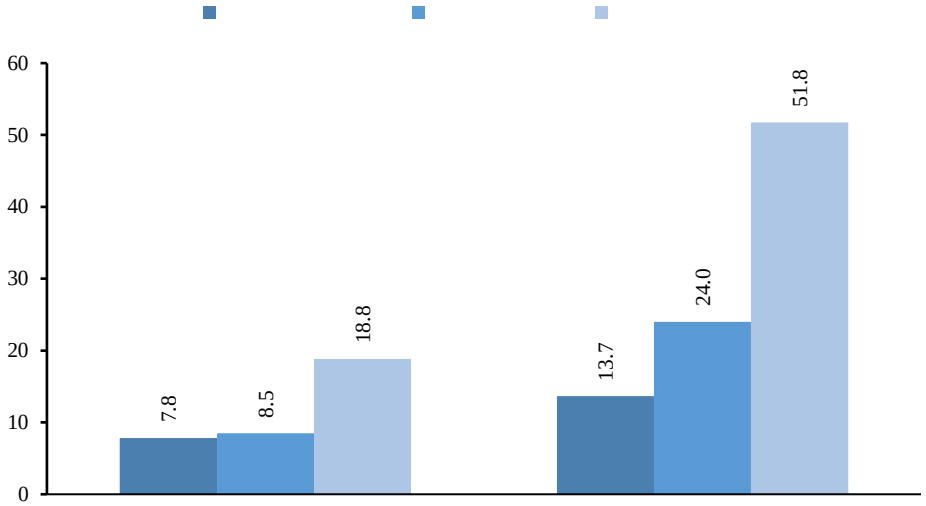
	2.7	4.5	4.0	3.5	2.7	3.5	3.7
š	6.3	4.5	4.5	5.2	4.2-6.3		

7.8 8.8 1

2022 8.5 8.3 0.2

13.7 24.0

16.5 24.6 2.8 0.6



62 2022

13 2022

7.8% 5.7%

13 “ ”

13

	2021Q1	2021Q2	2021Q3	2021Q4	2022Q1	2022Q2	2022Q3	2022Q4
%	7.4	7.9	8.2	8.6	8.6	8.3	8.0	7.8
%	5.9	6.4	6.5	6.8	6.6	6.3	6.1	5.7

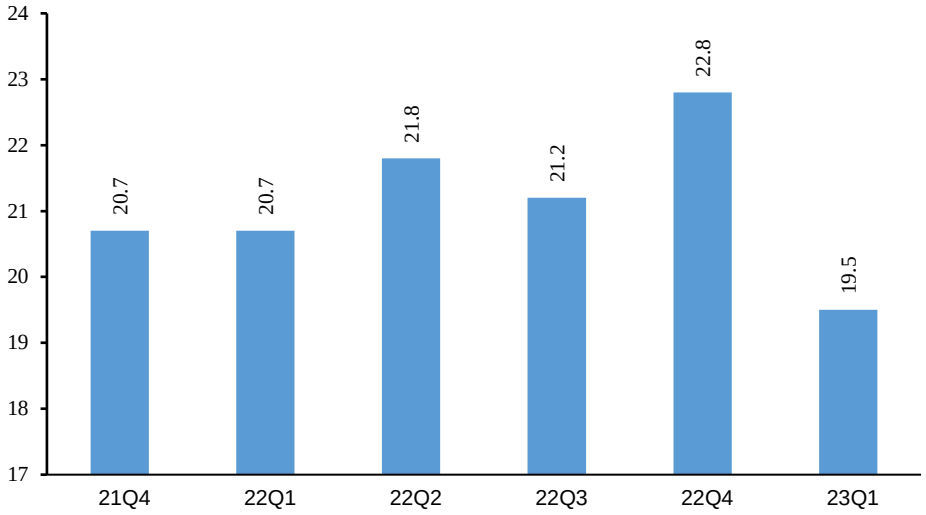
4.

2023 63

19.5

3.3 2022

20.7 1.2



63 2023

4.4

3.1 2.9 64

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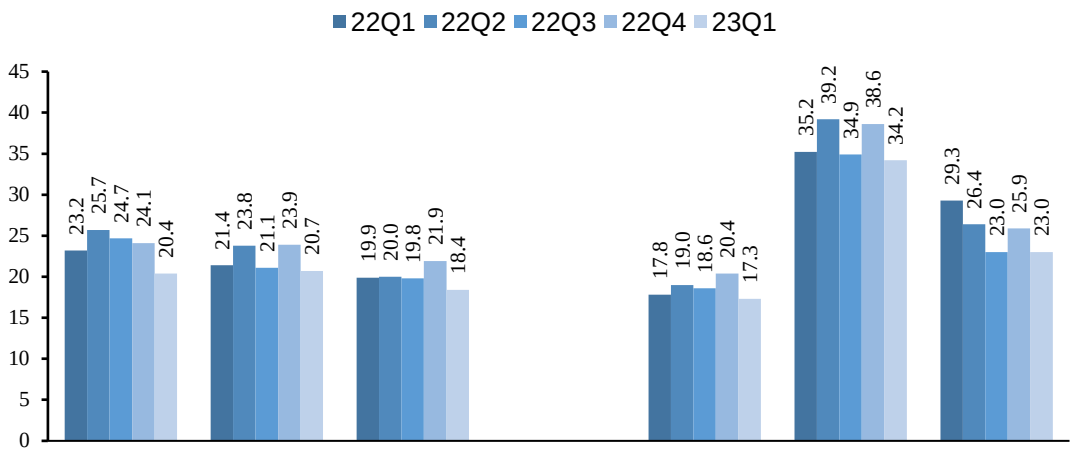
, 28.8 65



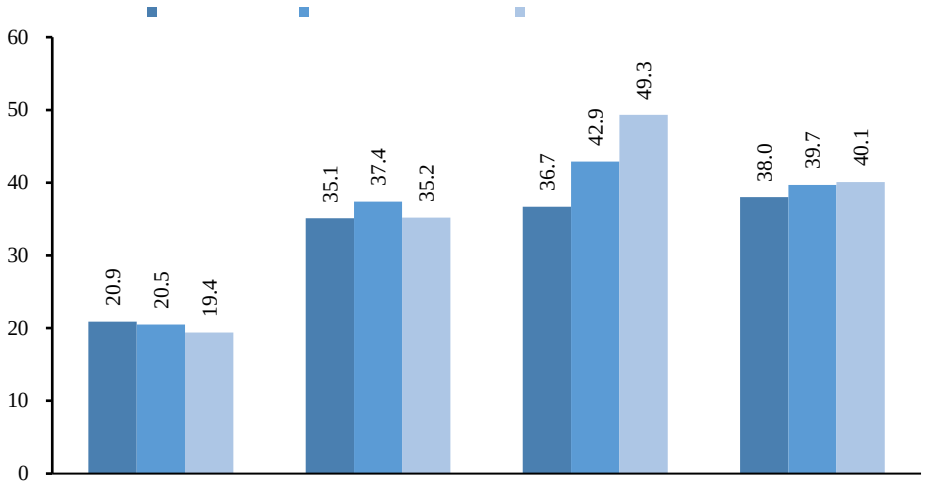
67 2022

68 2023

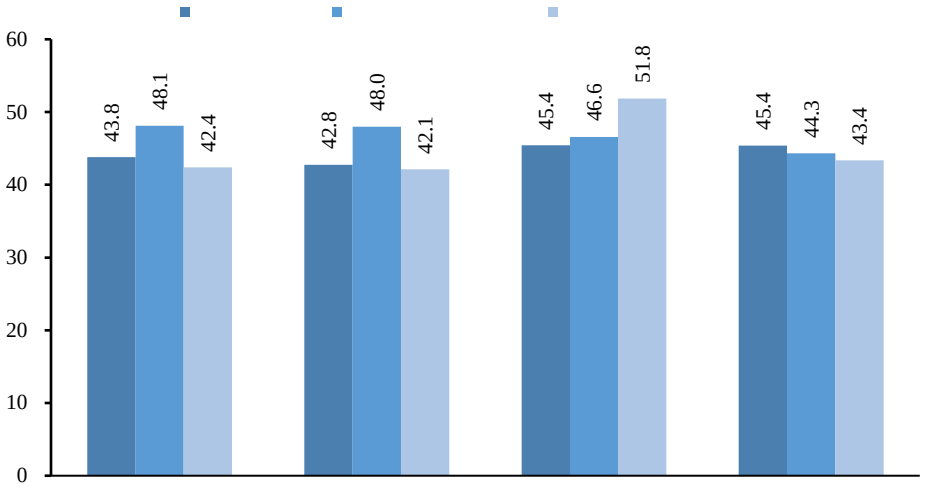
2.

69

70



4 69 2022 ª ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ Æ <# Â2± Á

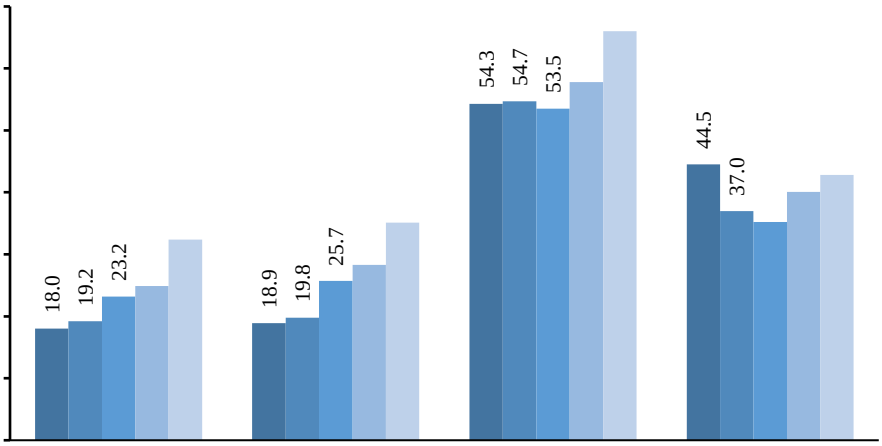


4 70 2023 ª 6 ™ Ü E ä5 :[ù = ¦ <N¯ = ¦ Æ <# Â2± Á

71

20

72



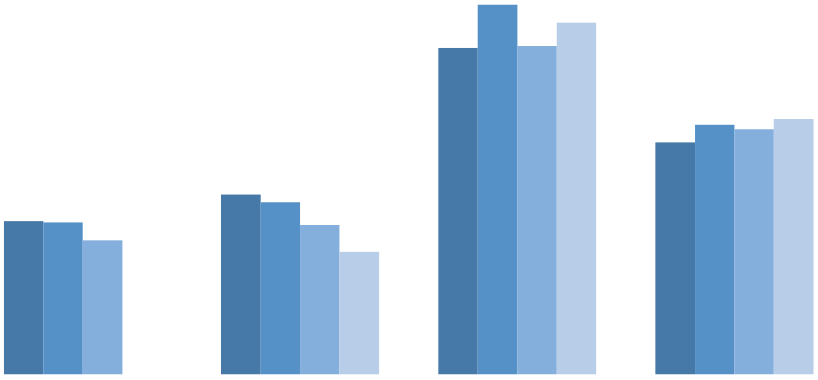
71 2022

4 72 2023 ª 6 ™ Ü E ä5 :[6; ` › ù <N¯ = ¦ ¸ <?ú W

2022

73 2023

74



4 73 2022 ª ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ ¸ <>, P

4 74 2023 ª 6 ™ Ü E ä5 :[` › ù <N¯ = ¦ ¸ <>, P

3.

2022 12

15.9%

19.2% 39.2%

40.5% 75

75 1 .

4 75 2022 ª ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ Æ 5 :[6; æ Ö U û ë

4 76 2023 ª 6 ™ Ü E ä5 :[ù <N¯ = ¦ Æ5 :[6; æ Ö U û ë

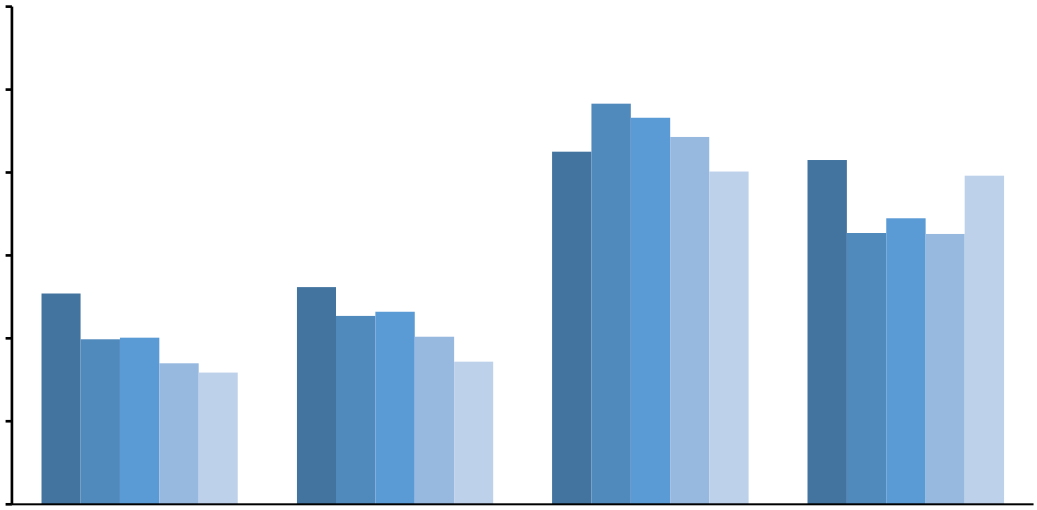
77

U 76%

U

76%

78 “ ”



4 77 2022 ª ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ ÆLý Ž U " Á

4 78 2023 ª 6 ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ ÆLý Ž U " Á

2022 10 2

2023 9 8

2023

2022

2023 1

2023 1 30 2 3

5176

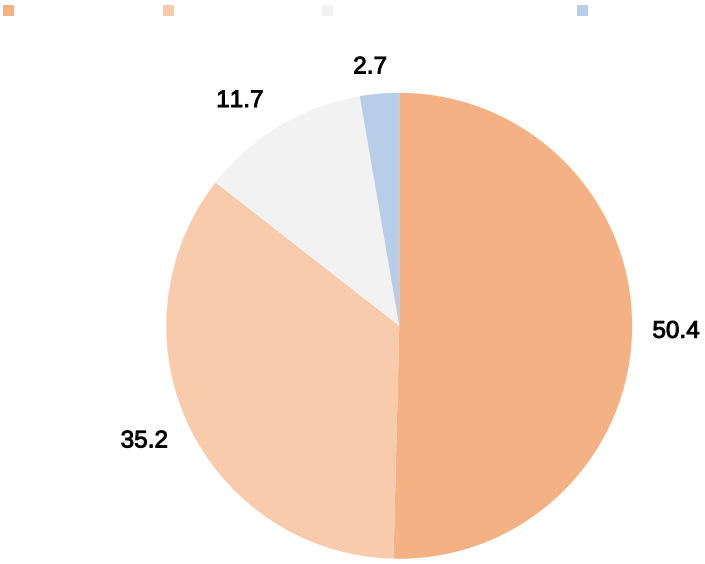
1. 2023

2023 2023 1 50.4%

35.2% 11.8%

2.7%

81



4 81 2023 ª 1 > Ë E ä5 :[6; ˜ C5 :[û ë < 9 ´ % µ

2023 84.3%

45.7% “ ” 38.6%

“ ” 12.1% “ ” 3.3%

“ ” 82

4 82 E ä5 :[6; / 2023 ª5 :[û ë ù û ë < 9 ´ % µ

2023 ל

“ ” 27.8% “
” 4.5% “ ” 4
16.5% “ ” 17.7% “
”

2023
63.6% 21.9% 14.5%
4
55.3%

2022

2022 2022 2021

17.7% 13.3%

0.7% -2.5%

2.4

16.0% 22.1%

6

19.2%

29.7% 31.1% -3.4%

2.2

2022

6 &Ÿ‘”⊁ YQ„ wµÔ@PÕá$Q^CPS¥³c³] X•F0 Ê ÒÁ %X@EžR #Đ •‘^Bµ :[Ìc~ b5 TÂ û nð;€E£c´[• óâ<Ô@

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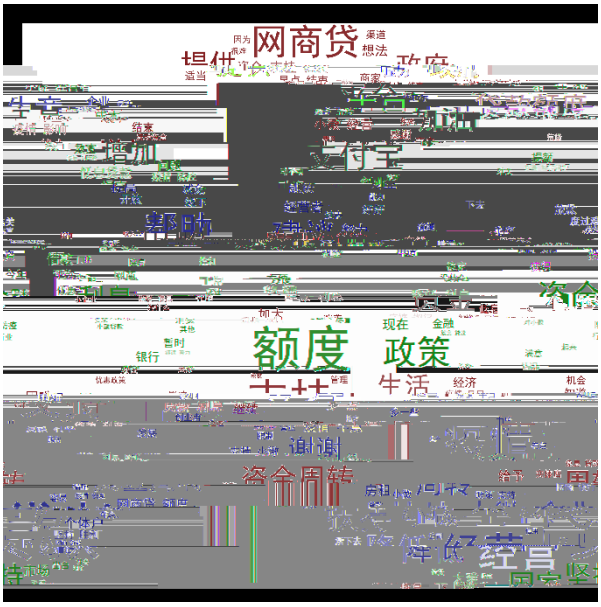


1 2022

7 52% 69%

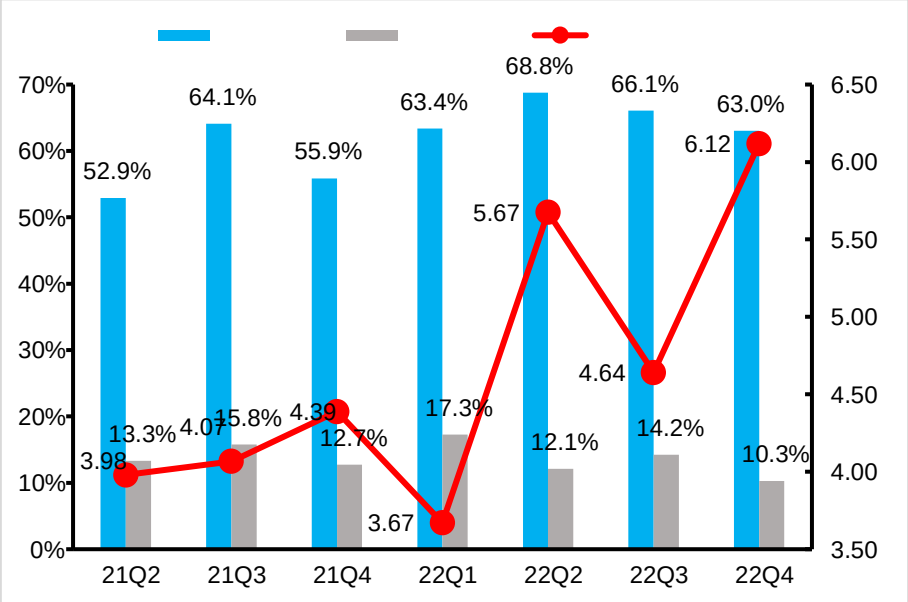
10% 17% 3.6 6.1

7.1

2.4 4.39

6.12 2

2023


70%
60%
50%
40%
30%
20%
10%
0%
6.50
6.00
5.50
5.00
4.50
4.00
3.50
52.9%
64.1%
55.9%
63.4%
68.8%
66.1%
63.0%
6.12
5.67
4.64
3.98
4.07
4.39
3.67
13.3%
15.8%
12.7%
17.3%
12.1%
14.2%
10.3%
21Q2
21Q3
21Q4
22Q1
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22Q3
22Q4

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