2022

2023

Online Survey of Micro-and-small Enterprises (OSOME):

Quarterly Report (2022Q4) and Confidence Index (2023Q1)

Center for Enterprise Research, Peking University

Institute of Social Science Survey, Peking University

Ant Group Research Institute

MYbank

2023 2

February, 2023

https://www.cer.pku.edu.cn/osome

https://www.deor.org.cn/research/confidencedata

2022

2023 2022 12 19 30

2023 **2023**

2023 1 30 2 3

1 2023 **8** **2023**

2023 2 3 85%

84% 2023

78.5% 2023

50% 40.3%

38.2% 30.5%

63.3%

2023 10

2 **2022**

17.7% 11.2 42.7%

2.5 2020

-2.5% 2.4

22.1% 16.0%

6

19.2%

3 2022

4

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2022

6 2022

74.4% 69.9%

2022

80

7 2022 **2023**

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2022

2023 **2023**

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[1] https://www.deor.org.cn/research/laboratory

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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 2023 71
2023 84% 2023 .....71....j4EMC -1 T14A

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[2] 6,076

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2020 9

[3]

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

ESIEC

2020 2 5 8 2021 7-8

[2] 2017

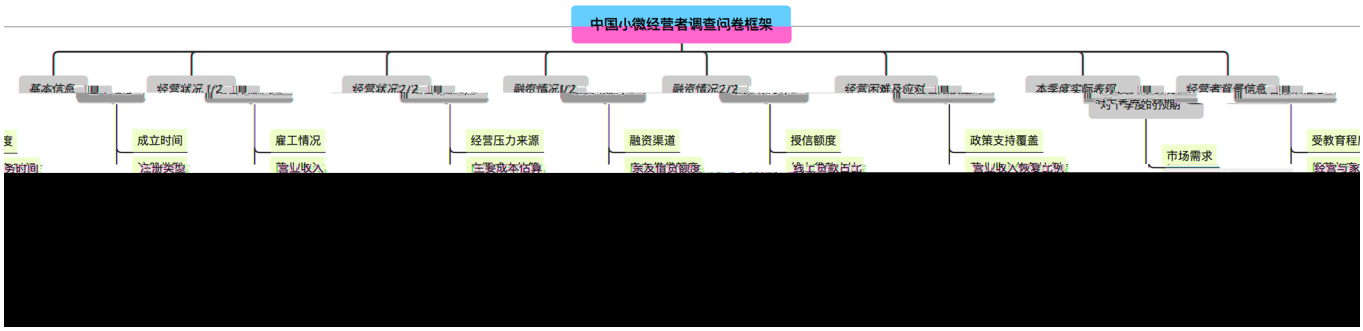
1000

90 2000

[3] “

” 2021(02):5-24 Kong et al., "One Year after COVID: the Challenges and Outlook of Chinese Micro-and-small Enterprises.", China Economic Journal (2021): 1-28.

[4] https://www.isss.pku.edu.cn/sjsj/zgqycxcytcesiecxm/index.htm



2022 [5]

44.1%

44.8% 11.1%

0-4 78.4%

2022

4.8 1 [6]

82.2% 10.7%

7.1%

80 90

“ ” 47.6%

2.5 37.6%

15.9%

49.9% 34.7%

15.4%

[5] https://www.deor.org.cn/research/confidencedata

[6] 300

300

2021 2022

4.4 5.5 4.6 4.3 4.3 4.6 5.8

1

				1-4
	4.8	2.0	33.5%	44.9%
	2.7	1.0	47.8%	40.1%
	4.1	2.0	25.9%	52.3%
	16.3	5.0	10.9%	32.7%

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
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2.7 1

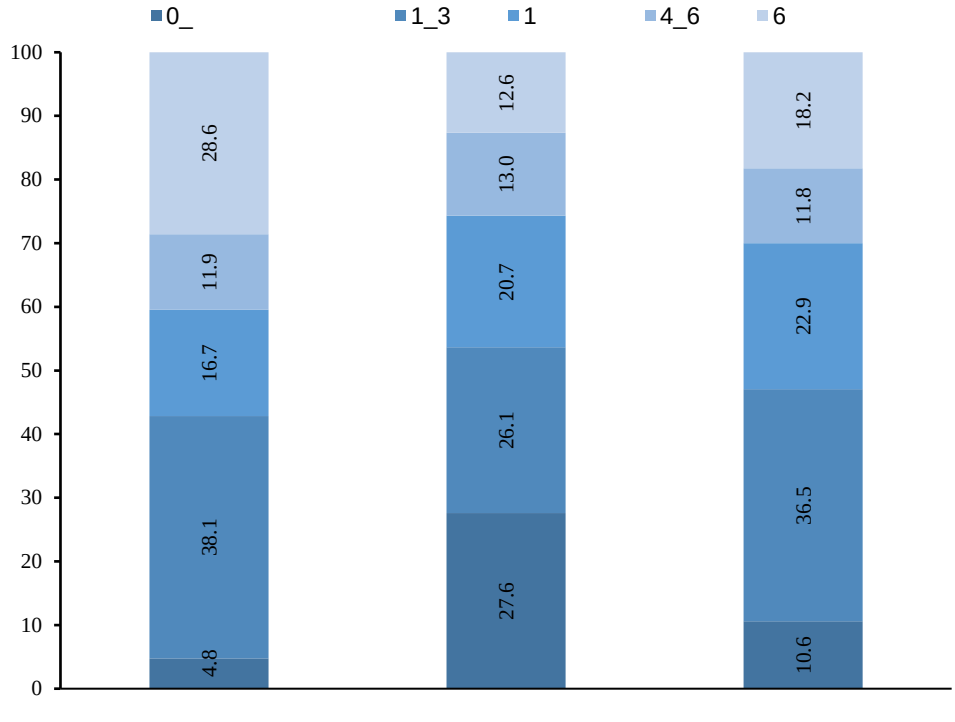
27.6%

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
1-3	42.3	41.5	39.5	40.8	20.6	20.0	33.1
4-6	13.3	12.7	10.7	8.8	10.6	11.1	9.6
6	20.7	20.3	16.5	12.3	21.3	22.6	19.2



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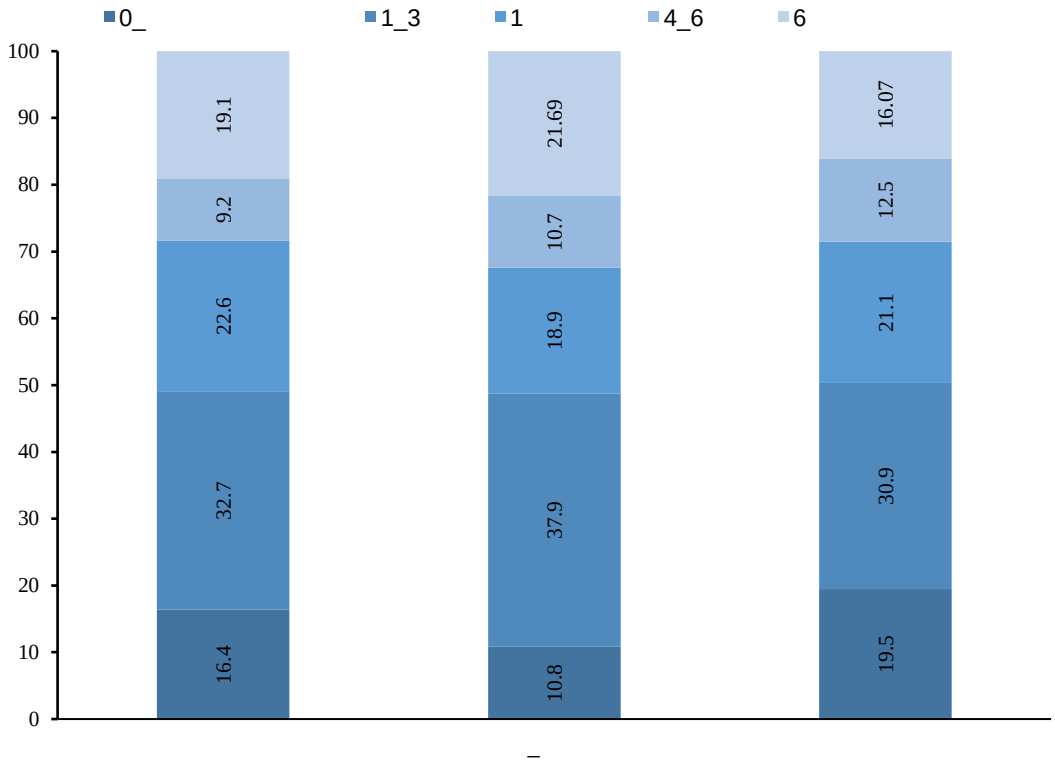

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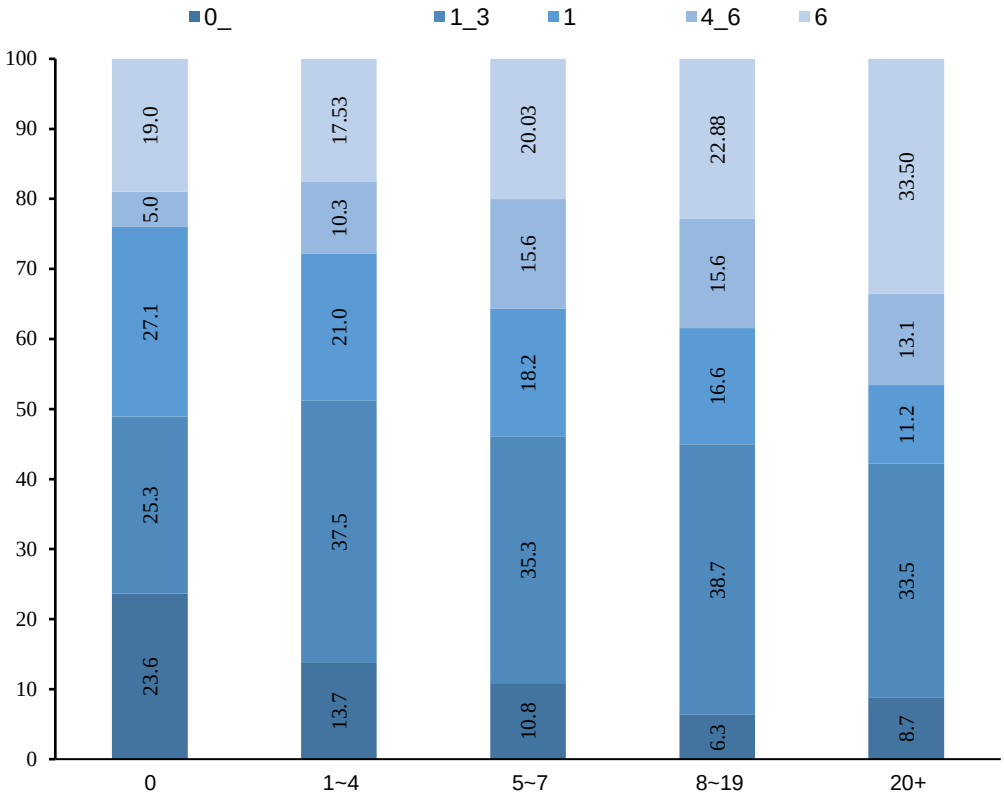
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38.7
16.6
15.6
22.88
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11.2
13.1
33.50
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1~4
5~7
8~19
20+

3 2022

1.

2022

4 4

30.9%

2020

21.2% 9.9

38.1%

43.1% 2020

48.5% 10.4

43.1% 38.9% 4.2

48.7% 9.8

6.6% 8.4% 2020

4

4 **%**

	2021Q1	**2021Q2**	**2021Q3**	**2021Q4**	**2022Q1**	**2022Q2**	**2022Q3**	**2022Q4**
	55.1	47.9	47.1	49.6	51.5	45.1	43.1	38.5
	48.6	46.9	45.4	46.5	46.5	40.2	43.1	38.9
	20.8	21.9	21.9	21.0	21.9	21.7	23.0	21.8	22.0

4 4 6F 10 ` ™ Ü E ä5 :[ƒ ?] Á Ñ ›$Æ –" ´ % µ

5 2022

40.8% 25.5%

19.4%

4 5 2022 ª ™ Ü E ä5 :[6;M˜ j,º q?· Á Ñ ›$Æ –" ´ % µ <>, P

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5-7

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4 6 2022 ª ™ Ü E ä5 :[6;5 :[Á Ñ –" ´ % µ <?ú W

2.

2022

51.1% 56.4%

5.3 42.6%

37.7%

26.4% 5.7

5

>ž 5 2021 ª 68) ™ Ü 2022 ª ? ™ Ü F b Á Ñ ›$Æ,º" Á ´ % µ

	2021Q1	2021Q2	2021Q3	2021Q4	2022Q1	2022Q2	2022Q3	2022Q4
	40.9	50.3	55.3	55.5	57.5	53.1	56.4	51.1
	53.1	49.3	43.4	50.2	48.0	46.4	42.6	37.7
	33.3	32.1	31.2	27.6	29.4	27.7	2	

7.1	10.7	11.3	11.9	10.5	9.7	10.2	9.8
9.7	5.9	5.9	5.4	5.5	5.9	5.8	6.7
1.9	2.7	2.4	2.6	2.2	1.4	1.7	1.5
1.4	0.8	0.9	1.3	0.8	1.4	1.1	0.8

6

>ž 6 2022 ª ™ Ü F b Á Ñ ›$Æ,º" Á ´ % µ <>, P

51.1	36.8	38.4	45.3	55.2	
37.7	47.7	52.3	24.0	36.4	
29.4	26.5	37.2	33.3	27.9	
26.4	14.8	22.5	23.6	28.4	
10.4	16.1	10.1	20.4	8.5	
9.8	10.3	7.0	14.2	9.6	
11.0	8.5	7.6	5.9	11.0	
2.6	1.9	0.9	1.4	2.6	
1.3	0.8	1.3	0.7	1.3	

3.

2022 3.1%

40.9%

7.6%

7

7 2022

2022 “ ”[7] “ ”[8]
“ ” “ ”[9]
12 2022 2023 1
7 68.8%
2023 1 76.2%

>ž 7 2022 ª 12 >8) 2023 ª 1 > E ä5 :[6;8 F& æ Ö+û" U û ë

	2022 12 19 20	**2022 12 29 30**	**2023 1 30 31**
	23.0%	**68.8%**	**76.2%**
	7.9%	26.0%	31.0%
	8.2%	32.4%	36.2%
	2.7%	4.0%	4.4%
	4.1%	6.4%	4.6%
	73.9%	**27.6%**	**21.7%**
	3.1%	**3.6%**	**2.1%**

1
2 3

7 http://www.gov.cn/xinwen/2022-11/11/content_5726144.htm
8 http://www.gov.cn/xinwen/2022-12/09/content_5730902.htm
9 “ ” “ ” http://www.gov.cn/xinwen/2022-12/27/content_5733672.htm

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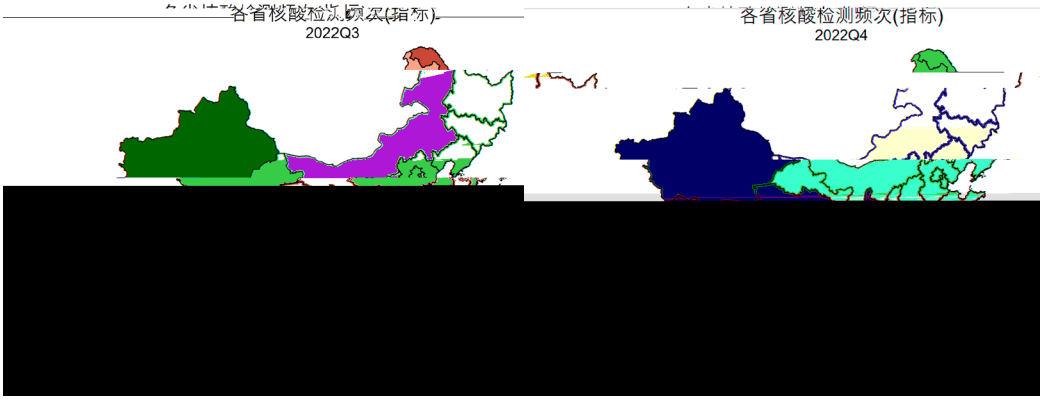
10 2022 2022

3.35 2.89

“ ” 21.8% 12.0% 9.8

“ ” 74.0% 61.9% 12.1



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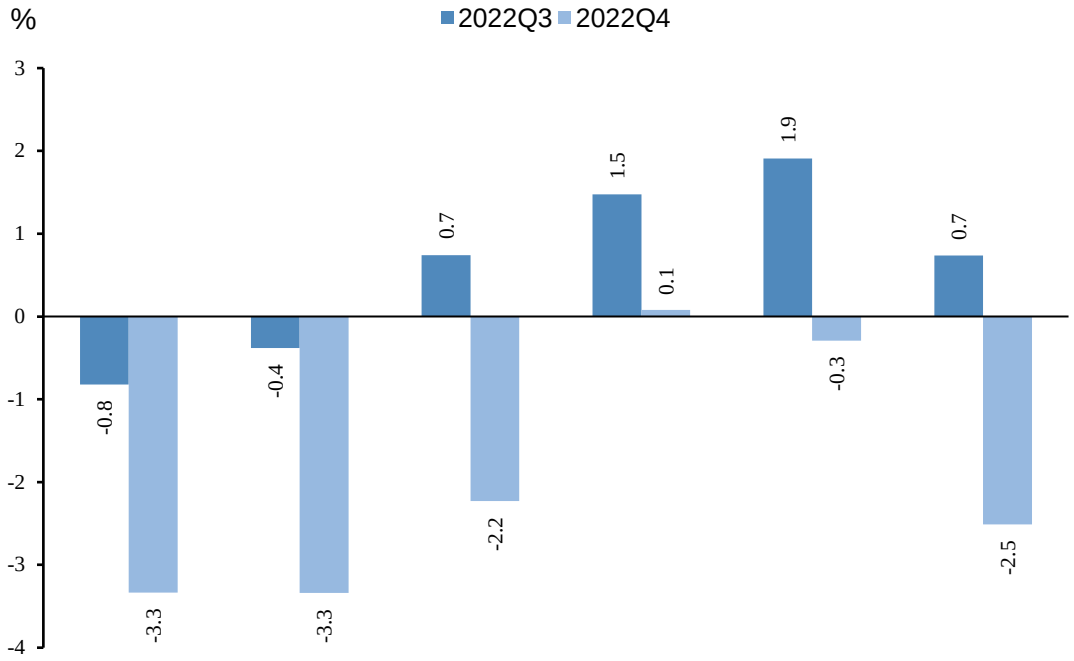

4 11 2022 ª ? ™ Ü = ™ Ü C BLh Ý u1Œ [r0A Ü A,º _#Ü)½

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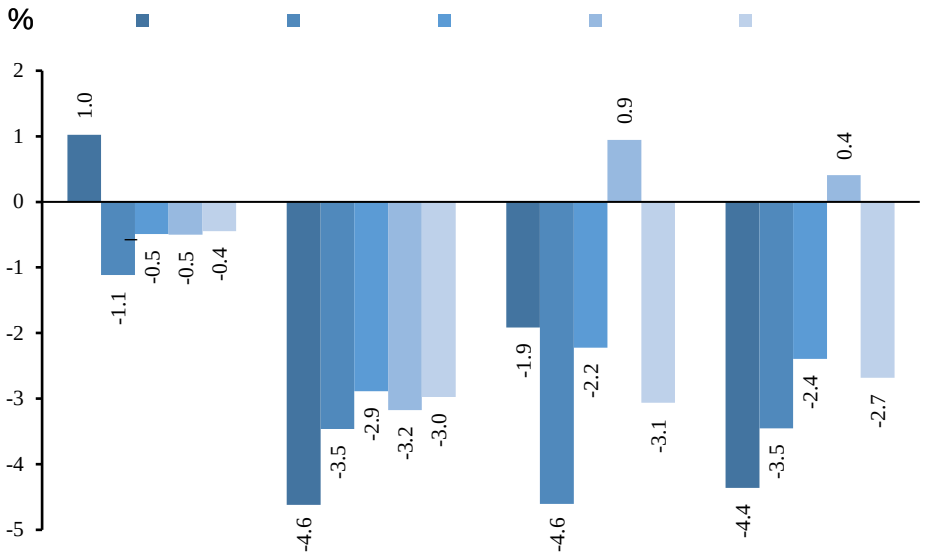

4 12 2022 ª ™ Ü C BLh Ý u1Œ [r0A Ü A,º _#Ü)½ ¸ < >, P

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2022

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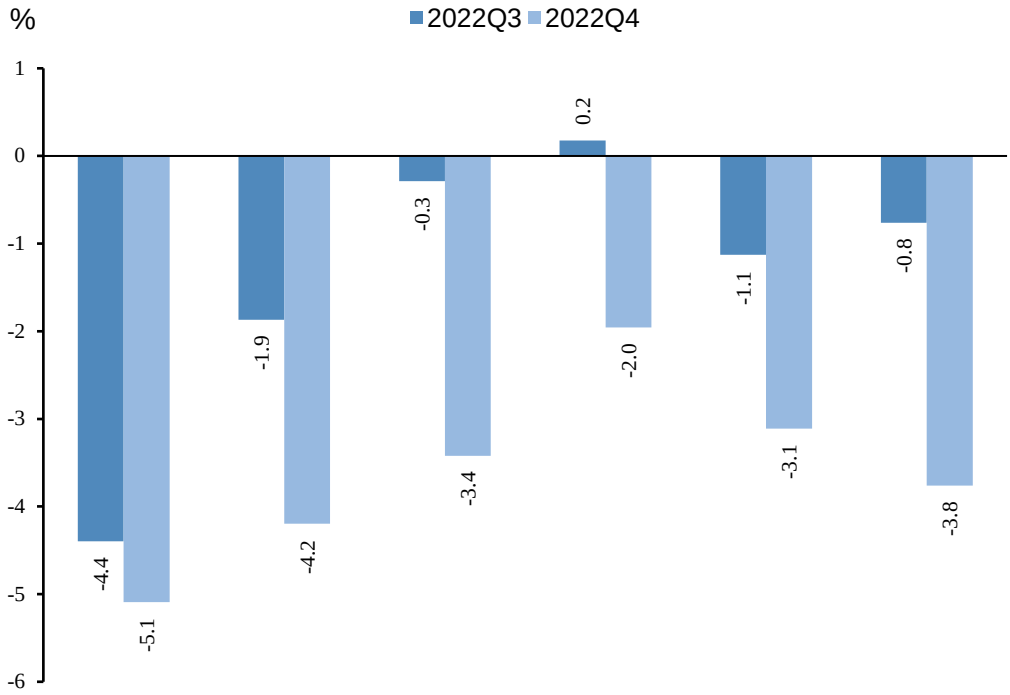
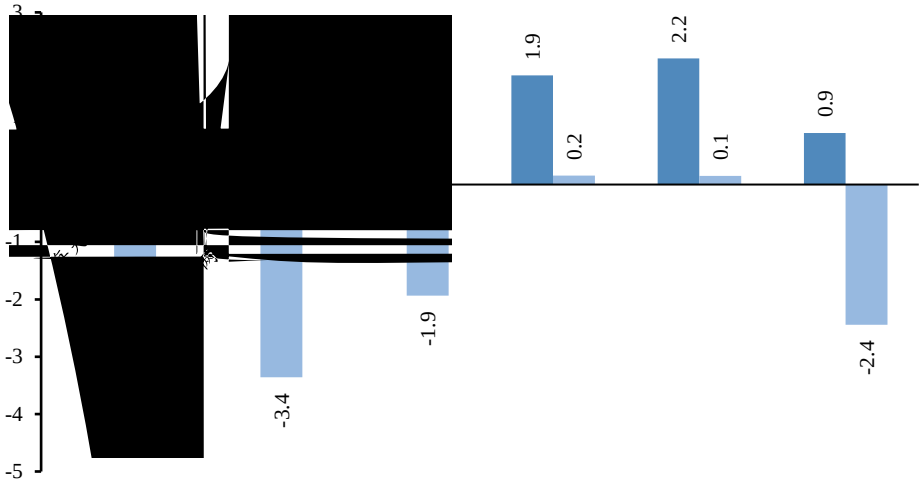


4 13 2022 1b ? =1b ™ Ü C B u1Œ Ąº 7 P _#Ü)½ÆLý Ž ð ¦ p 0 ð



4 14 2022 1b ? =1b ™ Ü C B u1Œ Ąº 7 P _#Ü)½ÆLý Ž ð ¦ p 1-4 ð

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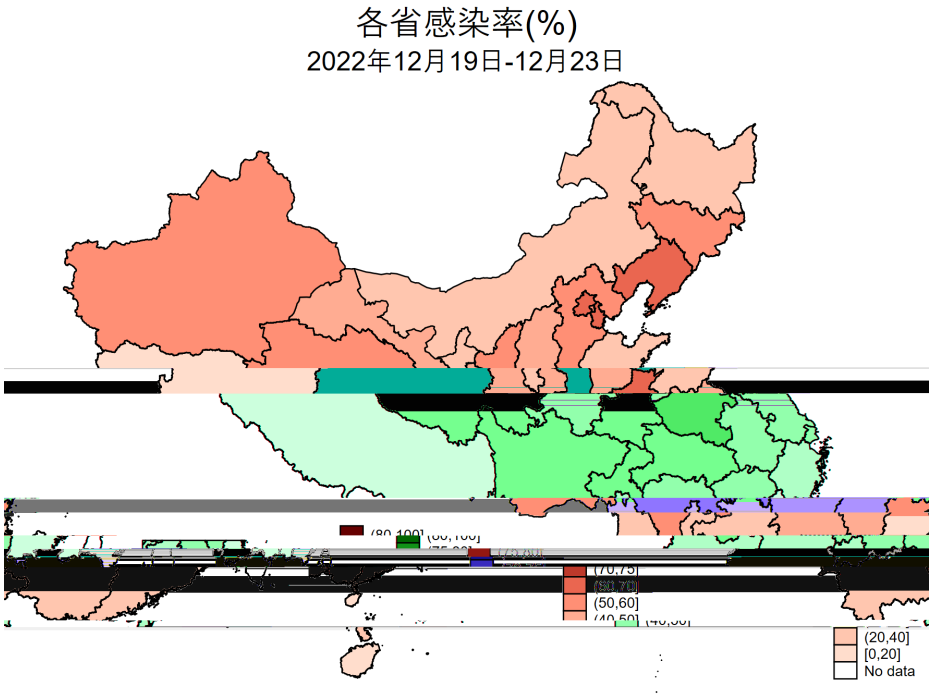
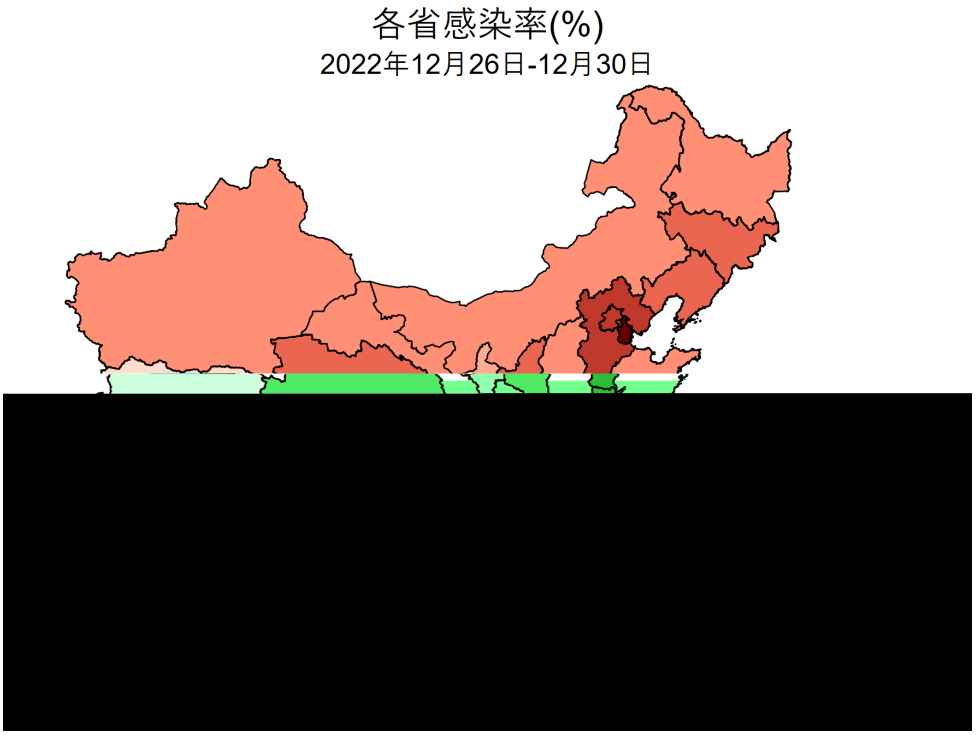
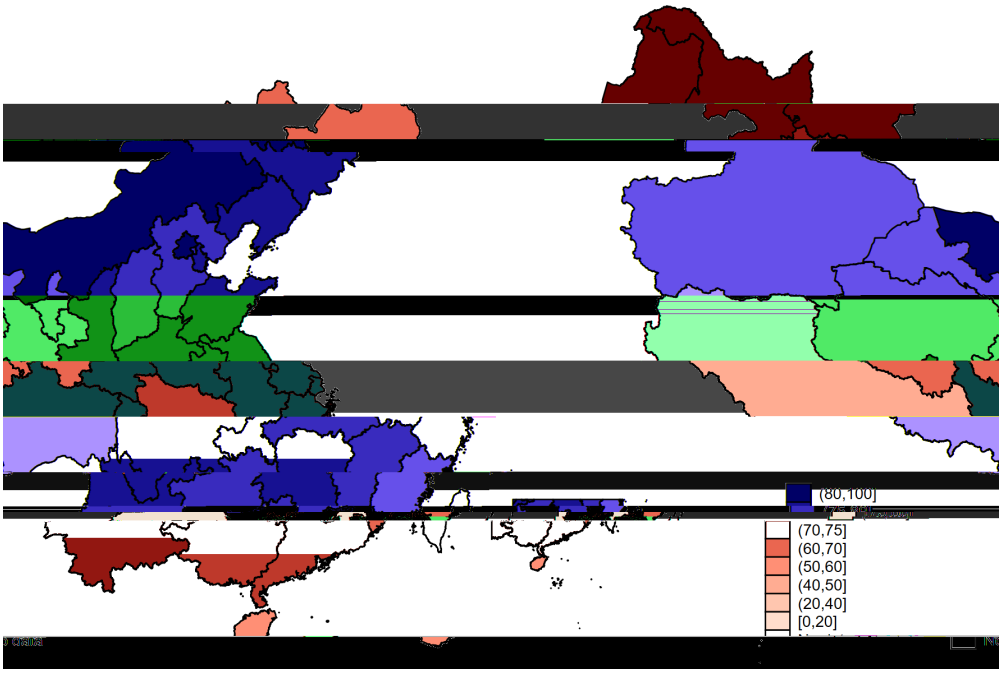


4 21 :-7 æ Ö+û" U)½ Æ 2022 ª 12 > 19 -12 > 23

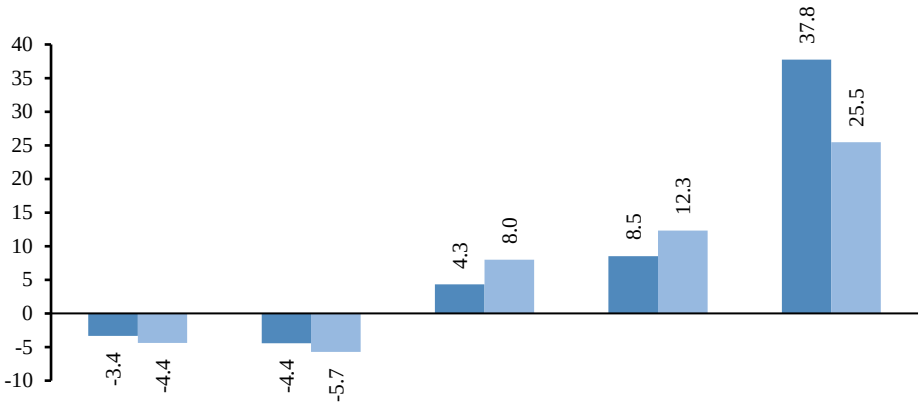


4 22 :-7 æ Ö+û" U)½ Æ 2022 ª 12 > 26 -12 > 30



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

24



4 24 ? 1 ð5 :[,º E ä c5 :[6; b ð e \ U D :N¯ = =

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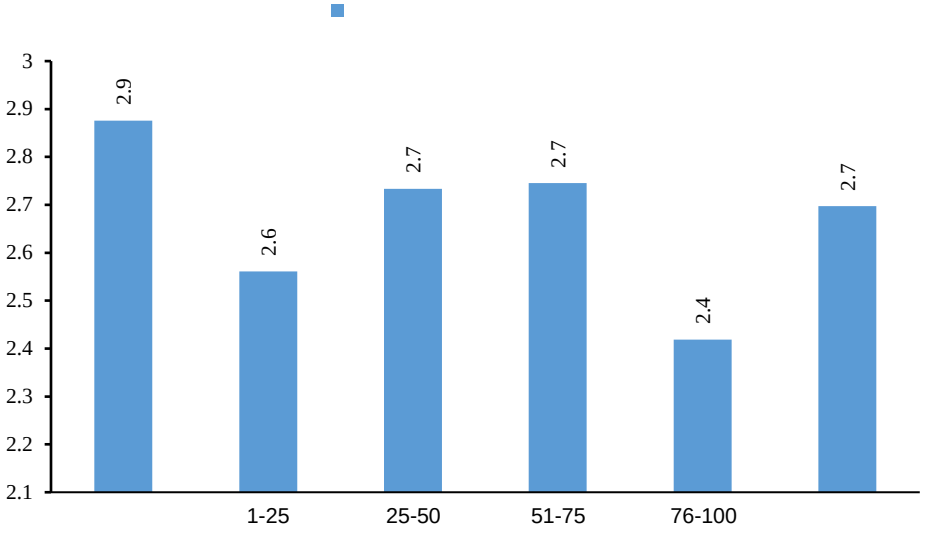
4 25 U " Á Â © } _#Ü)½



4 26 U " Á D)æH #w5* 7 û ë

4 27 U " Á D5 :[,º Á Ñ ^ û ë

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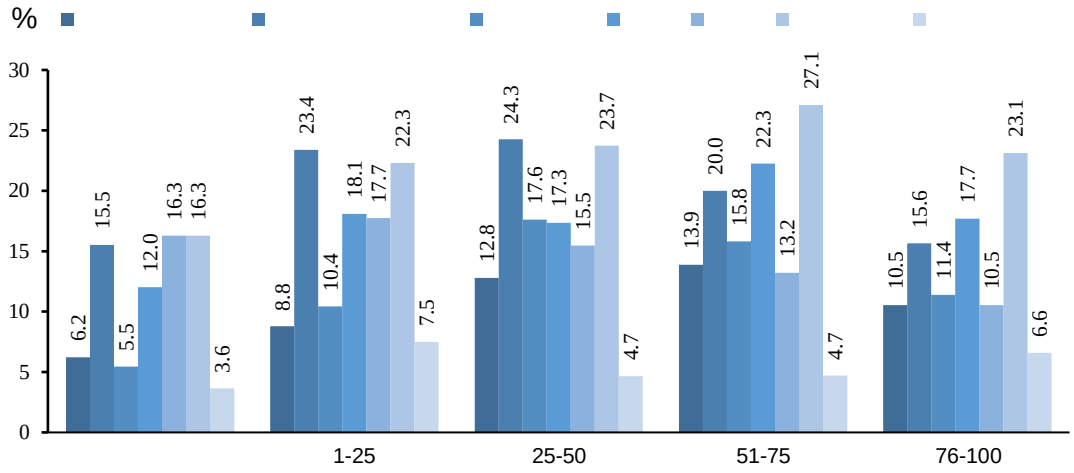

4 28 U " Á D5 :[B9 ª û ë

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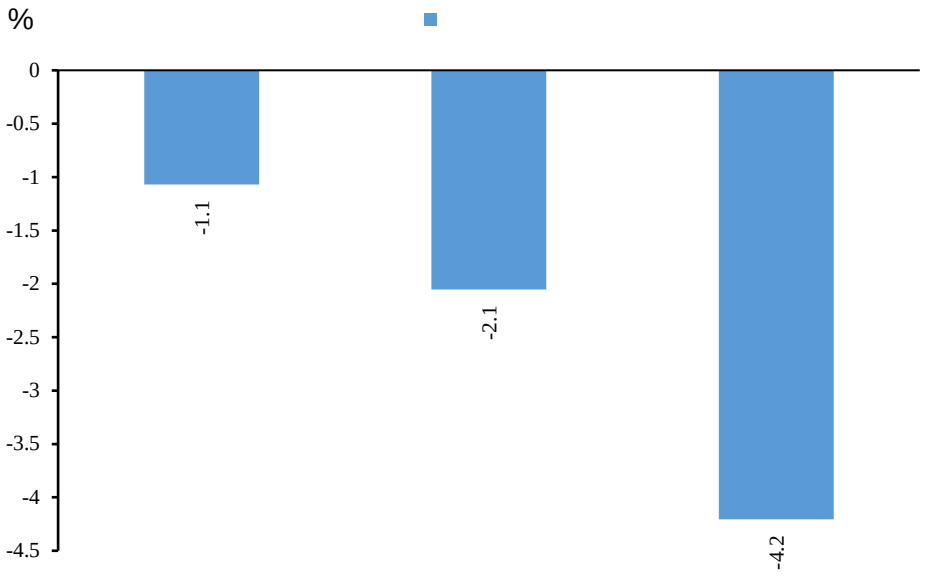

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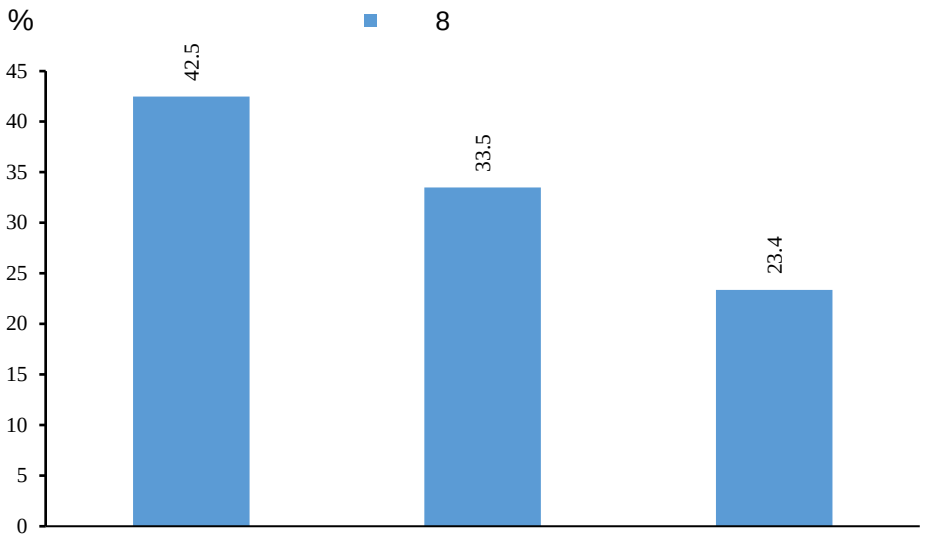
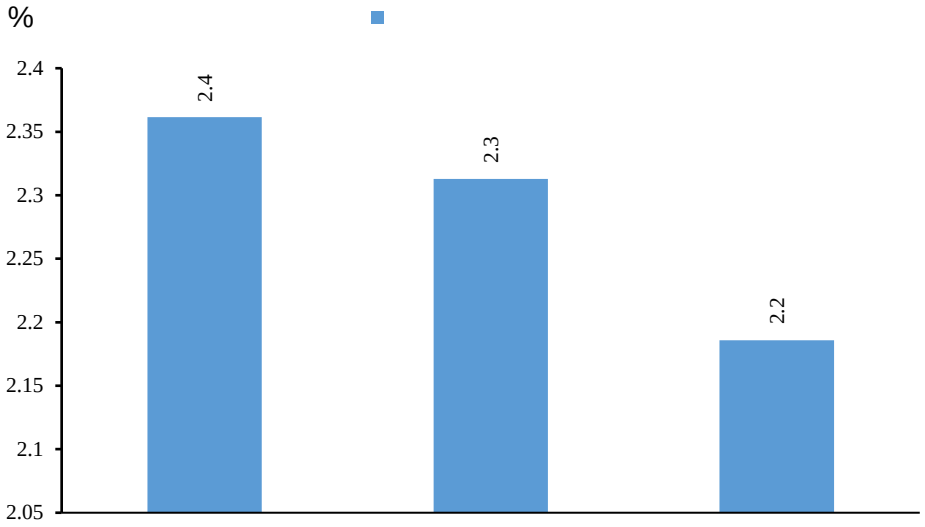
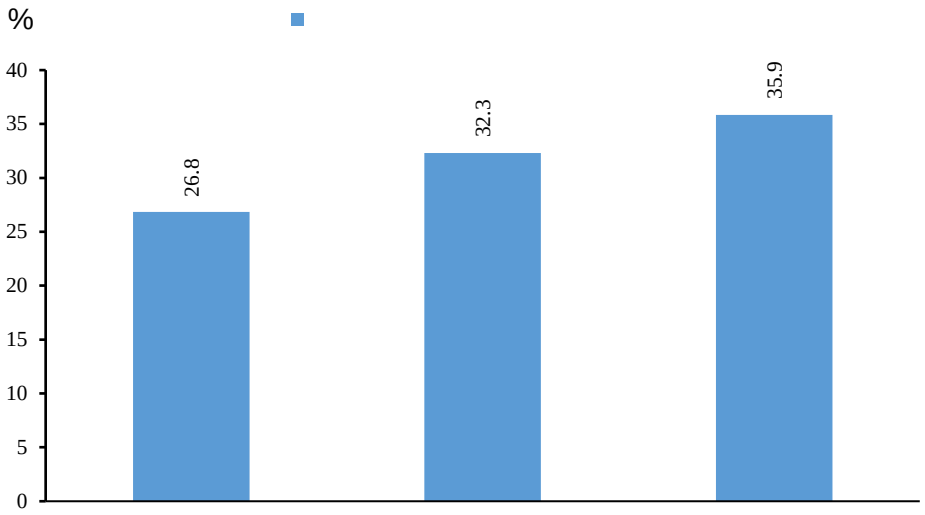


4 30 f p U " Á Â 6L 8 ž @ 7 P –"



4 31 f p U " Á Â)æH #w %5* 7 > ¦



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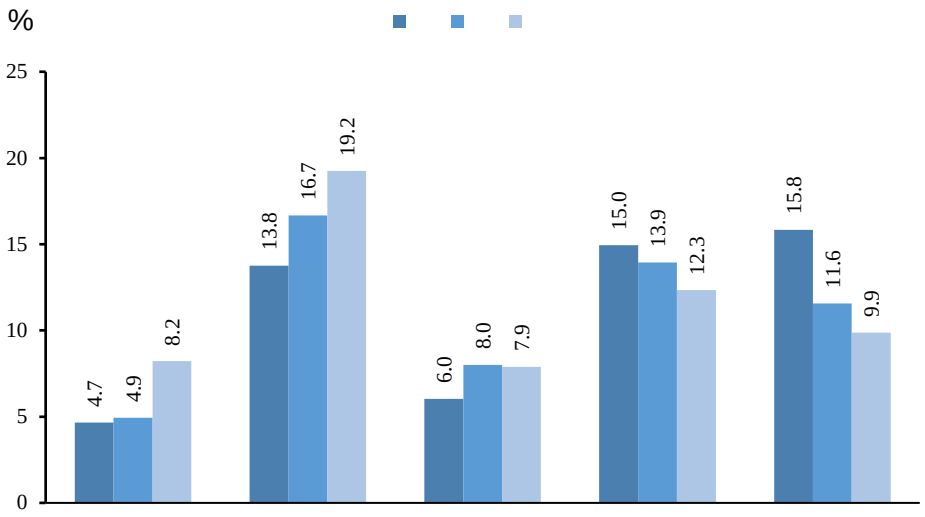

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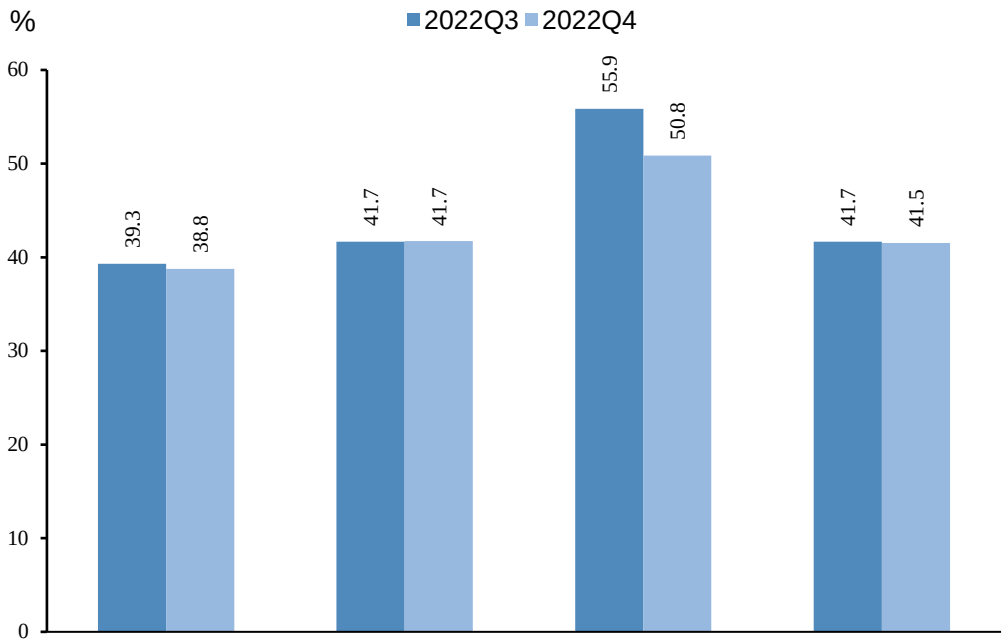
2022

50.8%

5.1 41.7% 41.5%

38.8% 35



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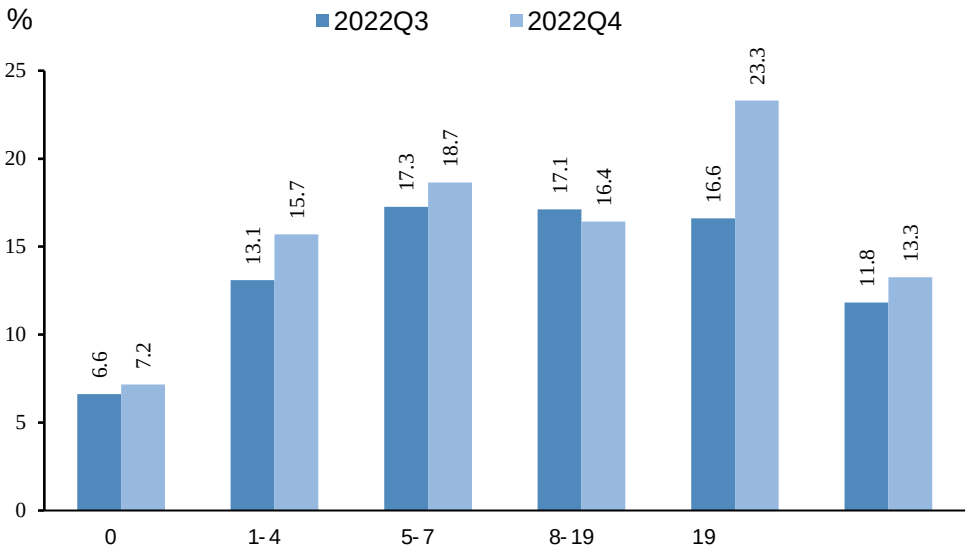

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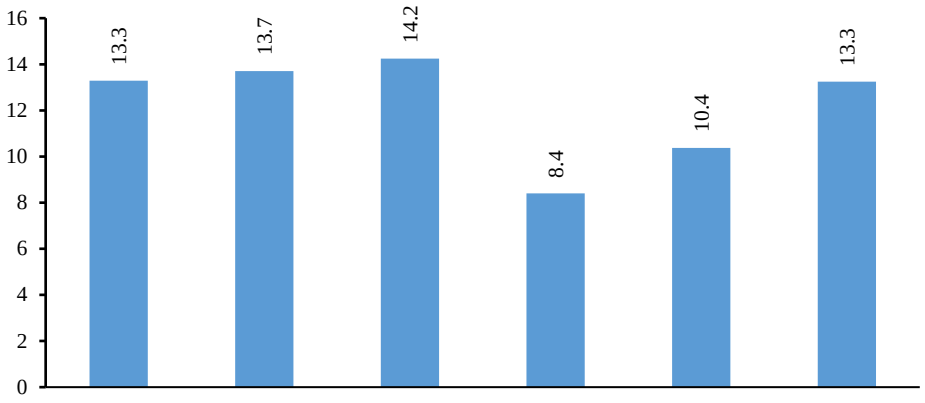

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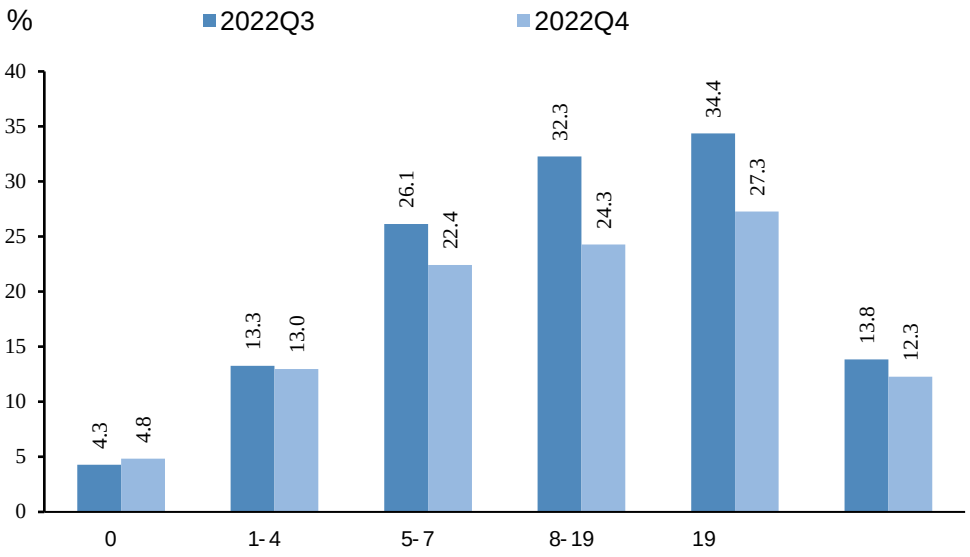

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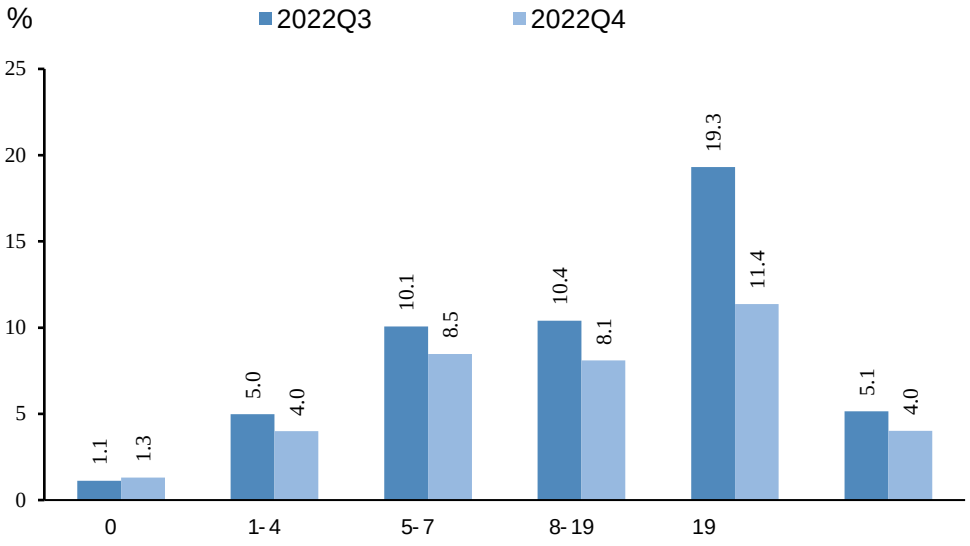

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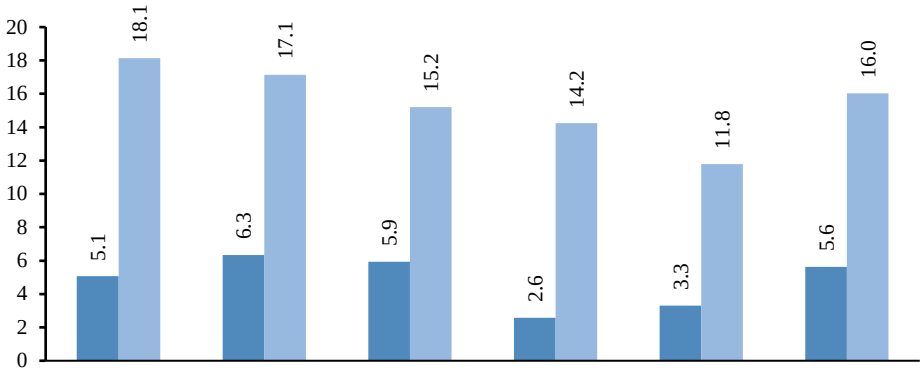

4 45 2022 ª ? ™ Ü = ™ Ü Kµ U ’ Ý –" Â+á ûLh Ý u1Œ [r0A Ü ©31

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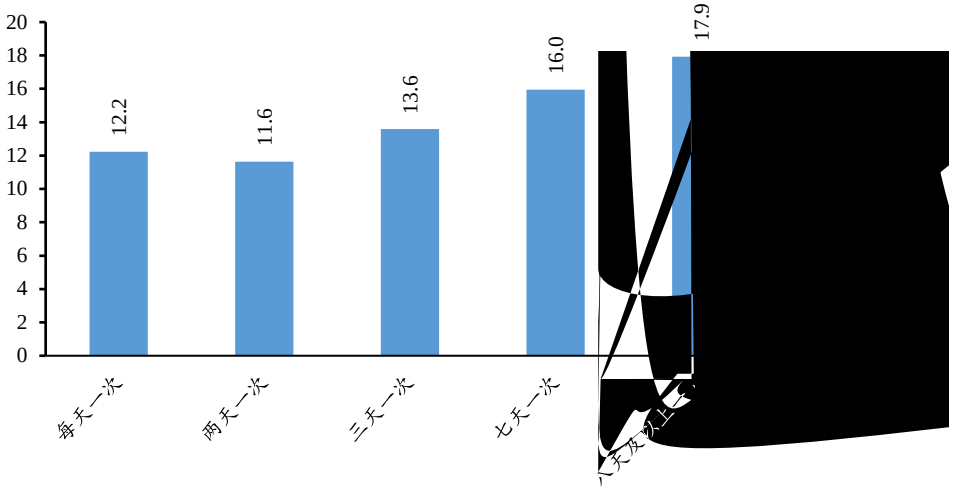
4 46 2022 ª ? ™ Ü = ™ Ü #Þ - –" Â 7 P?ú W ©31



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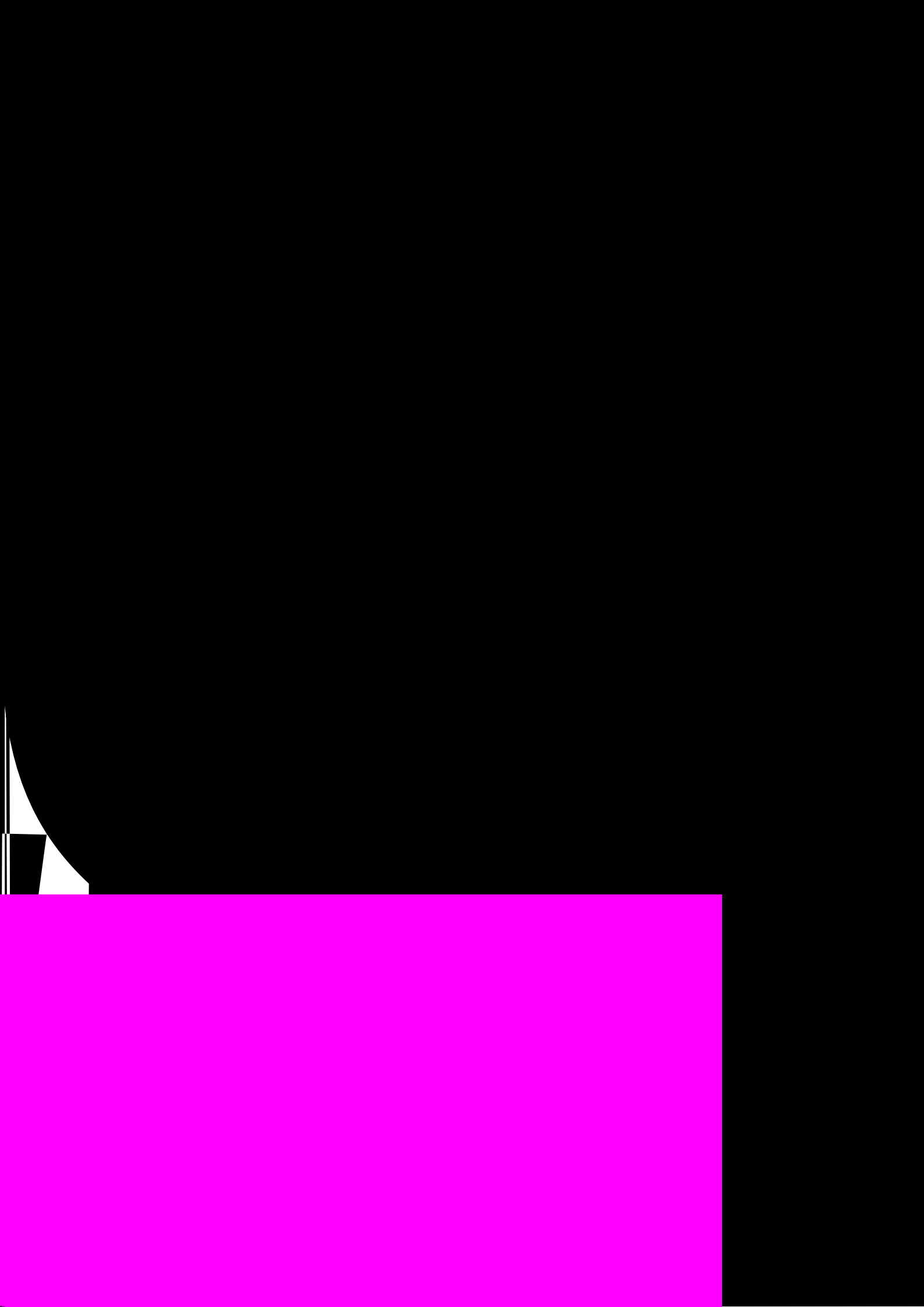
4 48 2022 ª ? ™ Ü = ™ Ü Ö p4õ @K6 d –" Æ <?ú W



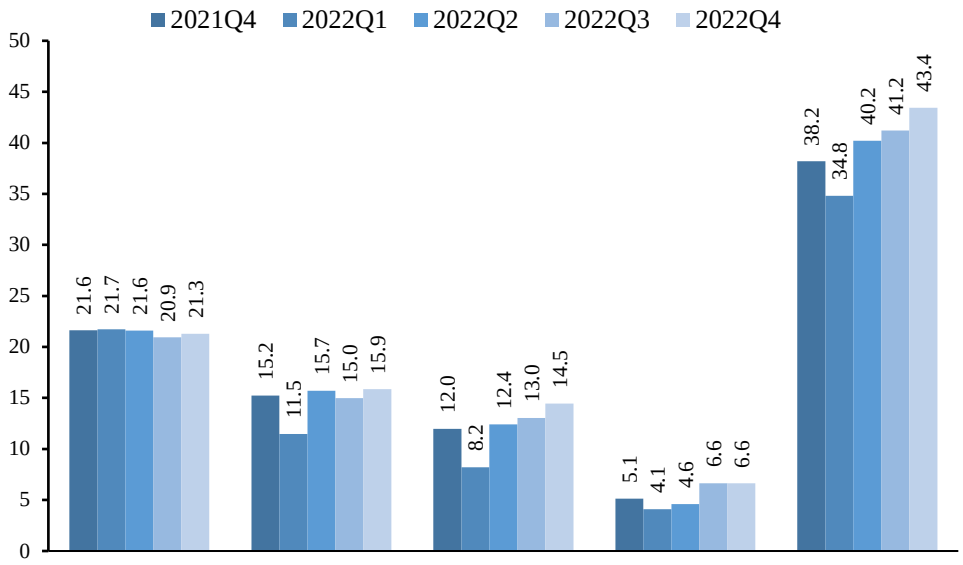
1.

2020

2022 52

43.4%

21.3% 15.9% 14.5% 6.6% 2022 8



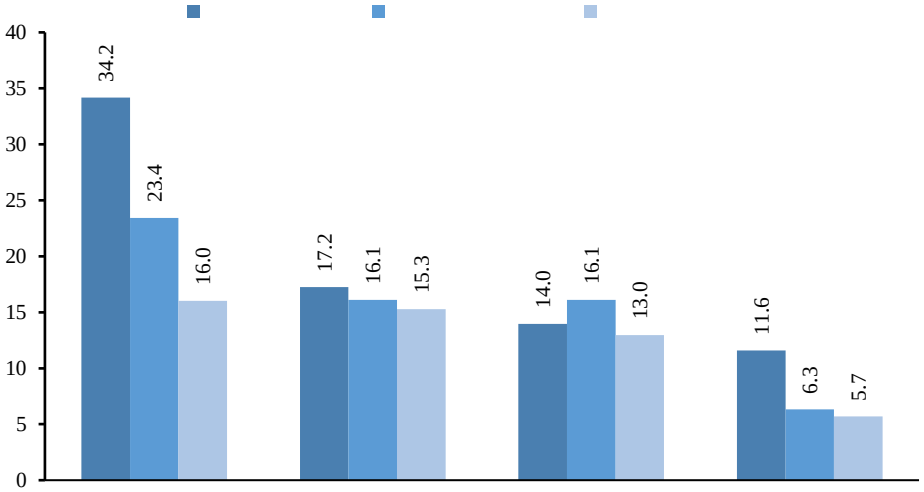
52 2022

8 6

	2021Q3	2021Q4	2022Q1	2022Q2	2022Q3	2022Q4
	-5%	-3%	0%	-1%	-3%	2%
	0%	-8%	-25%	37%	-5%	6%
	2%	-4%	-31%	51%	5%	11%
	-11%	-4%	-20%	12%	45%	0%

2022

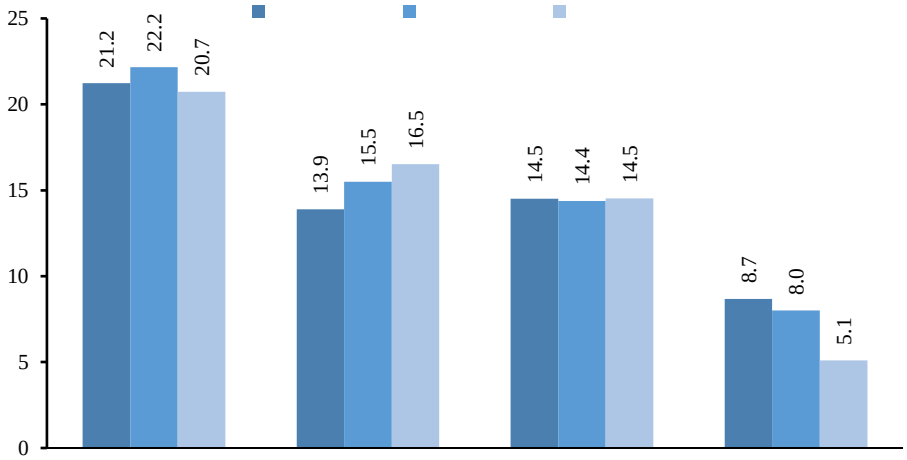
53



4 53 2022

12 2022

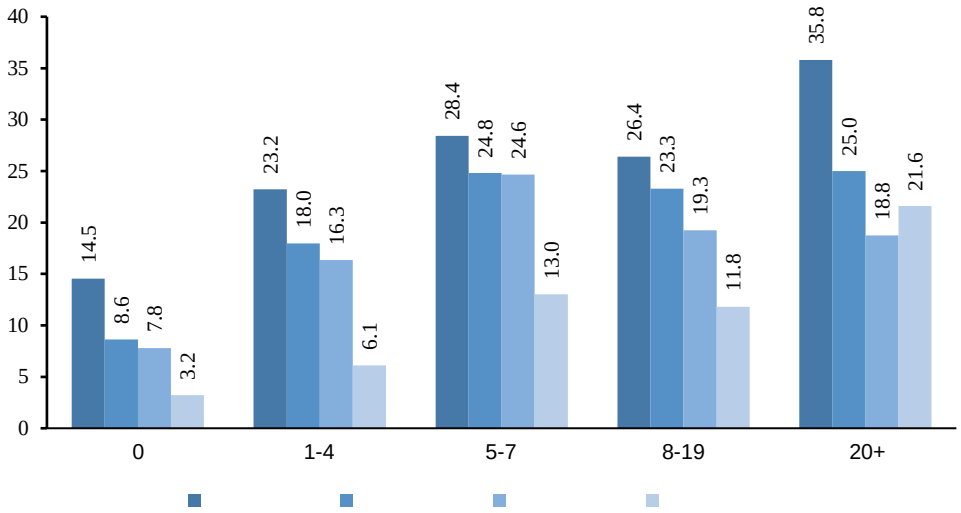
54



12 1 https://www.yicai.com/news/100648666.html

54 2022

55



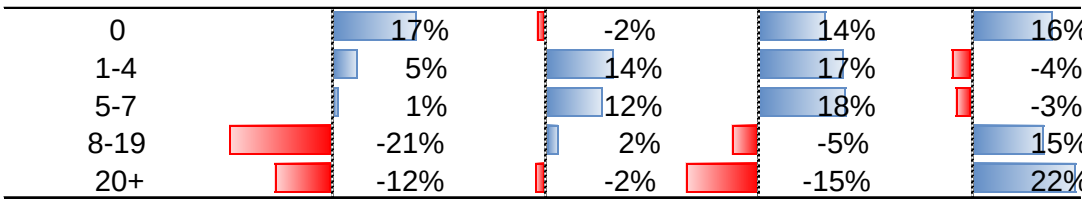
55 2022

2022

9

20+ 16% 22% 8

9 2022 **2022**

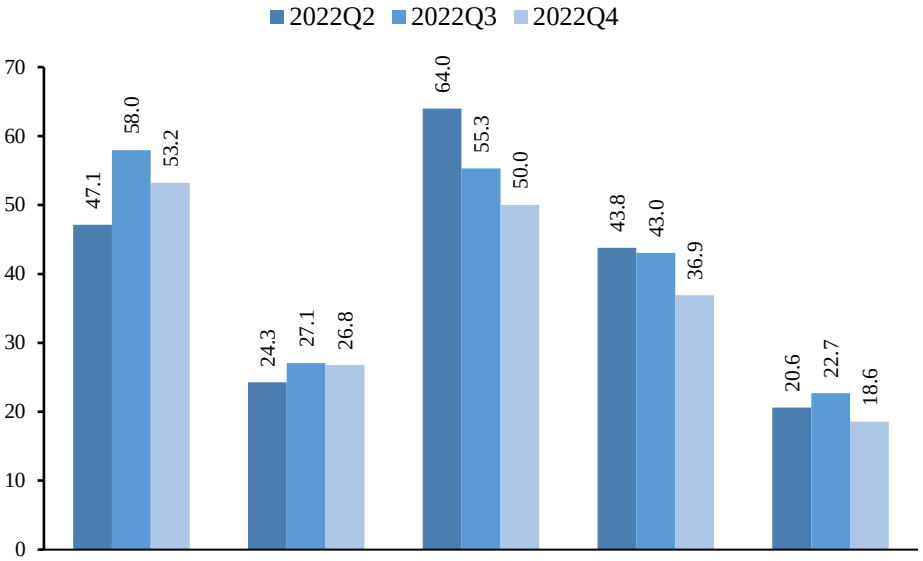


2.

56

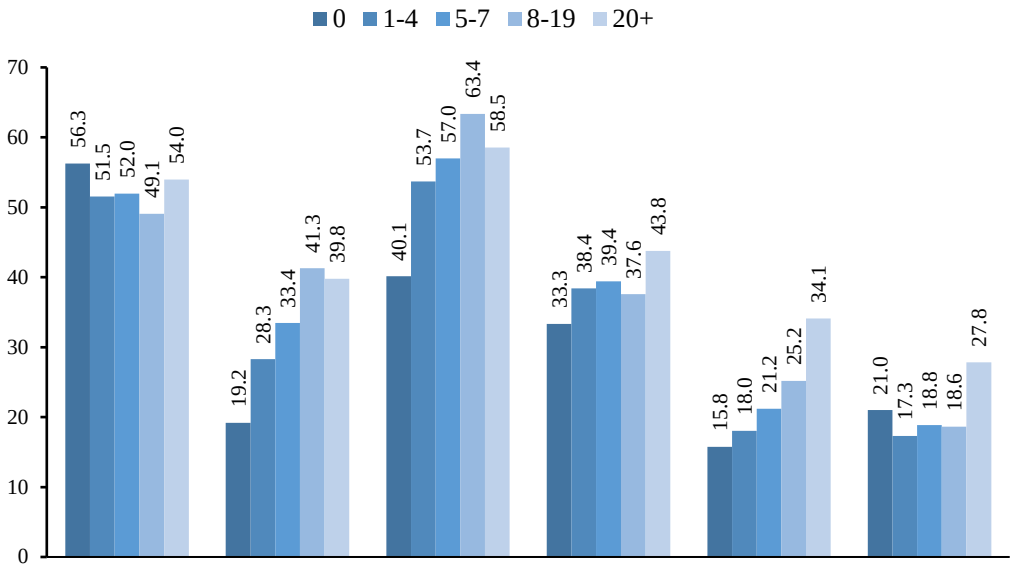
53.2%

50.0%



56

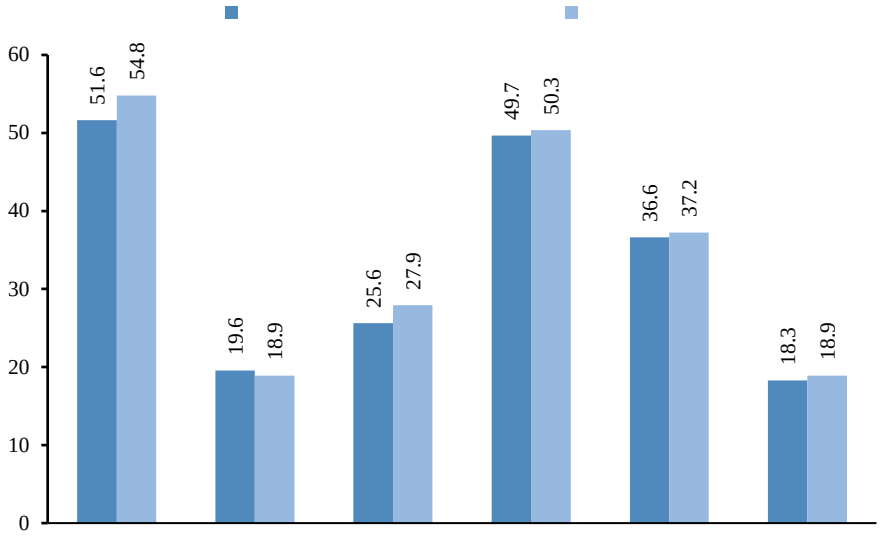
“ ” 57



57

3.

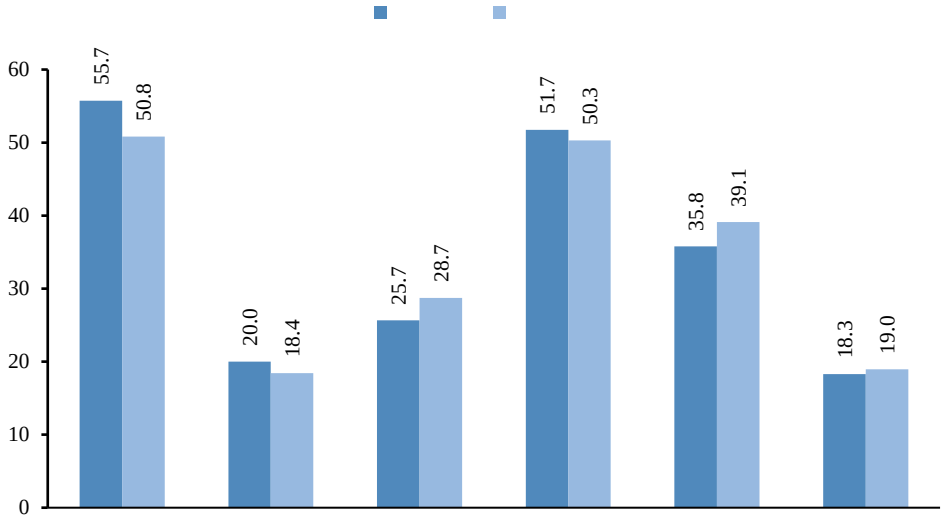
58



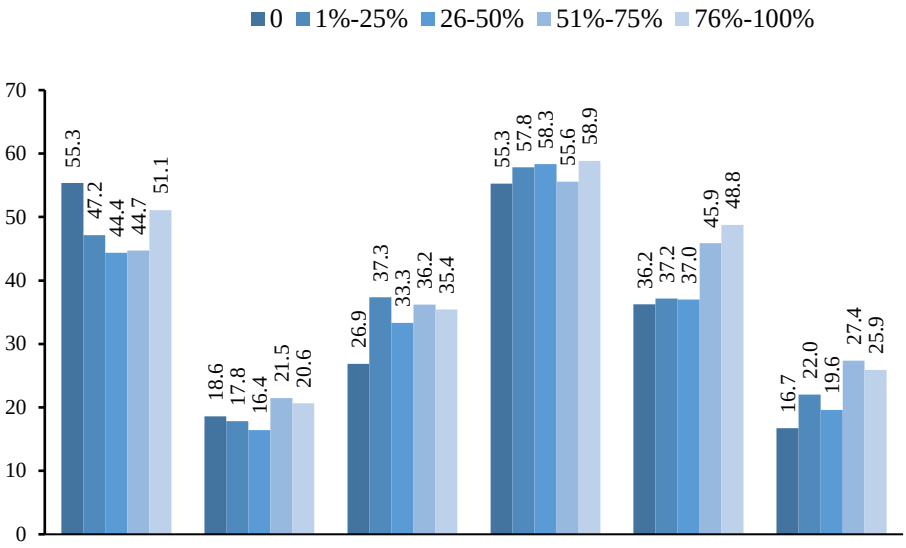
4 58 E ä5 :[6;,º u1ŒAÿ"x ¸ < f p nG®NÇ!W

59

60



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



4 60 E ä5 :[6;,º u1ŒAÿ"x ¸ < Ž U)½

1.

2022

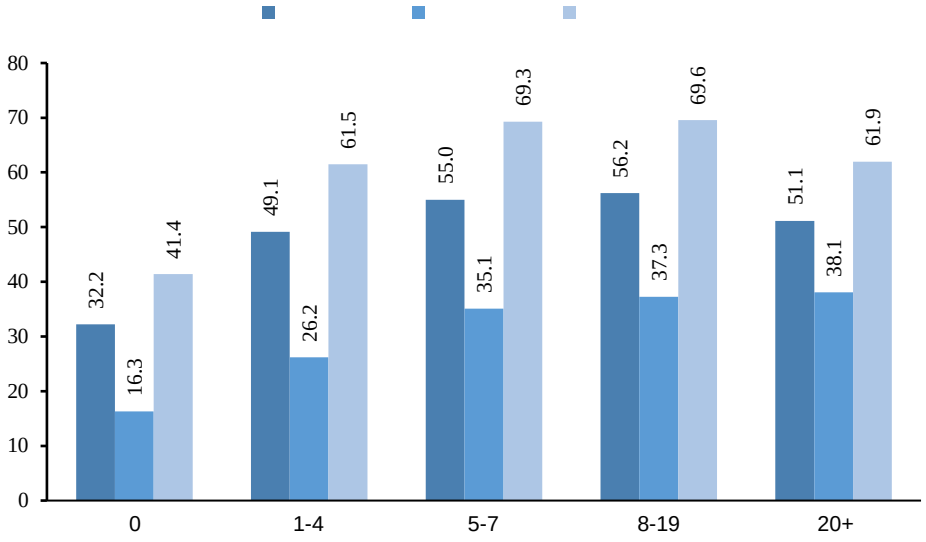
74.4%

	2.7	4.5	4.0	3.5	2.7	3.6	3.3	3.7
	6.3	4.5	4.5	5.2				

15.9	19.4	18.4	20.7	20.8	21.0	23.0	18.6	26.5	23.2

20 61.9%
64.9% 3 8-19
69.6% 0 41.4%
43.9%

0
2 20
1.4
61



61 2022

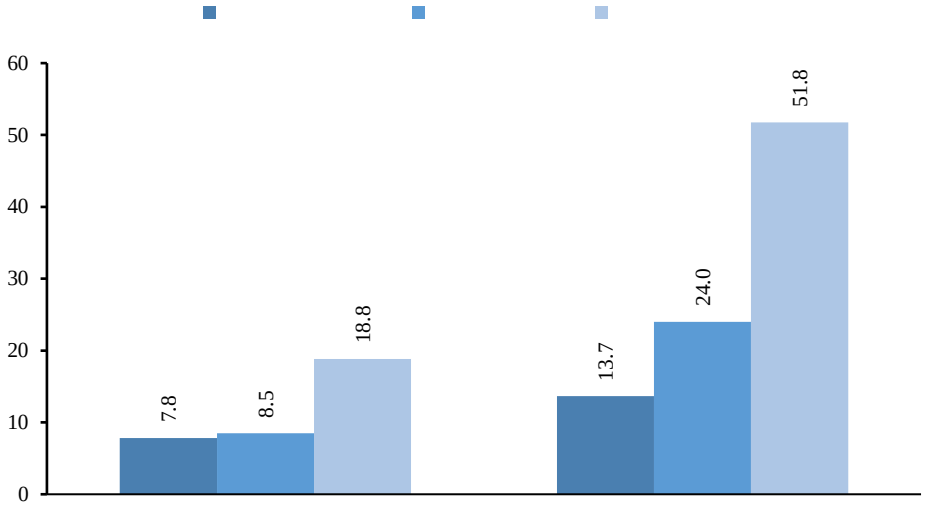
2022
23.2 26.5 3.3
20.3 24.4
4.1 40.1
41.0 0.9
25.5 24.8 0.7
62
18.8 24.5 5.7 51.8
57.8 6 2022

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

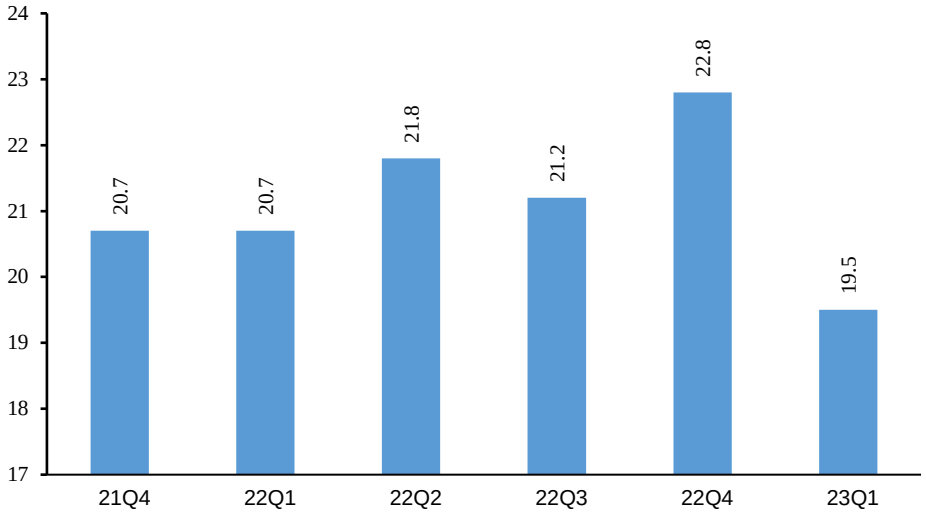
4.

2023 63

19.5

3.3 2022

20.7 1.2



63 2023

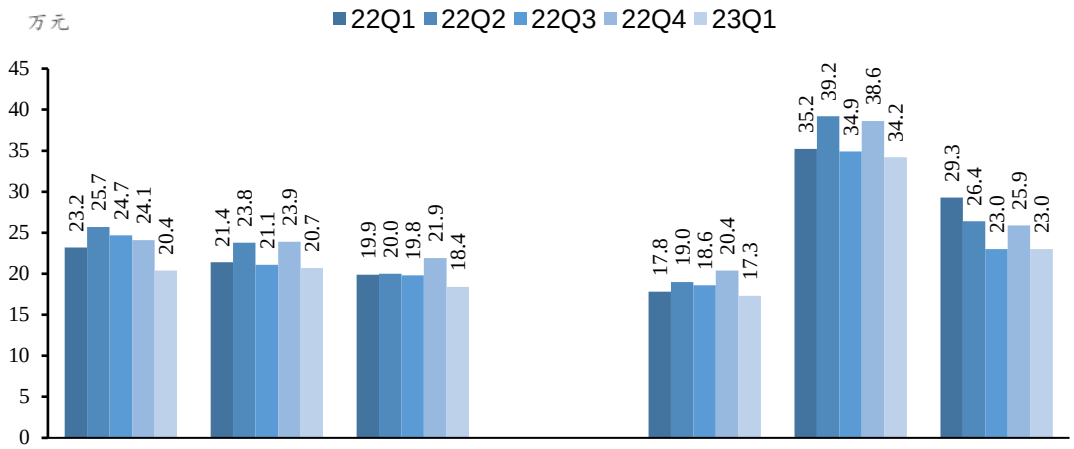
4.4

3.1 2.9 64

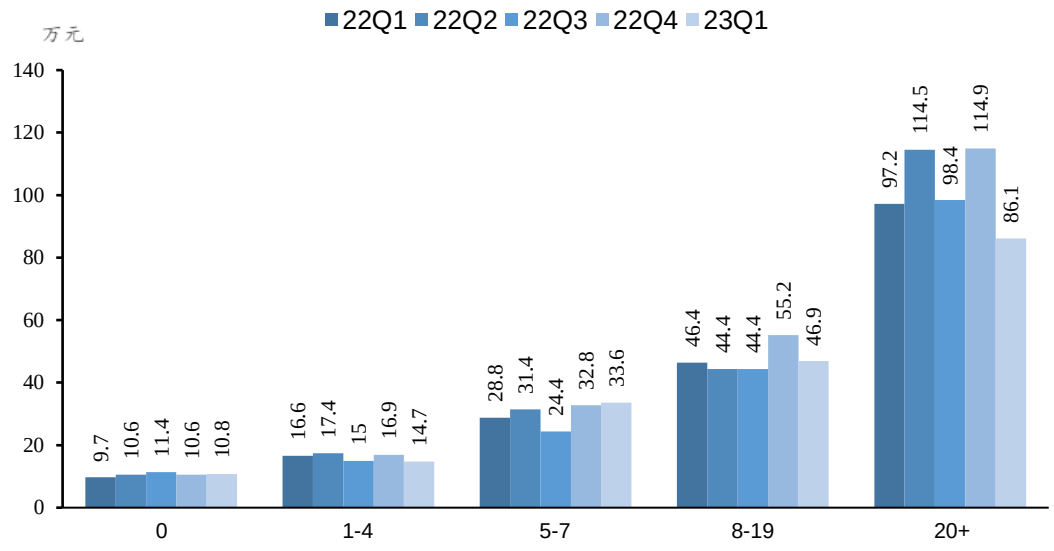
0

20

, 28.8 65



64



65

21.7 23.9

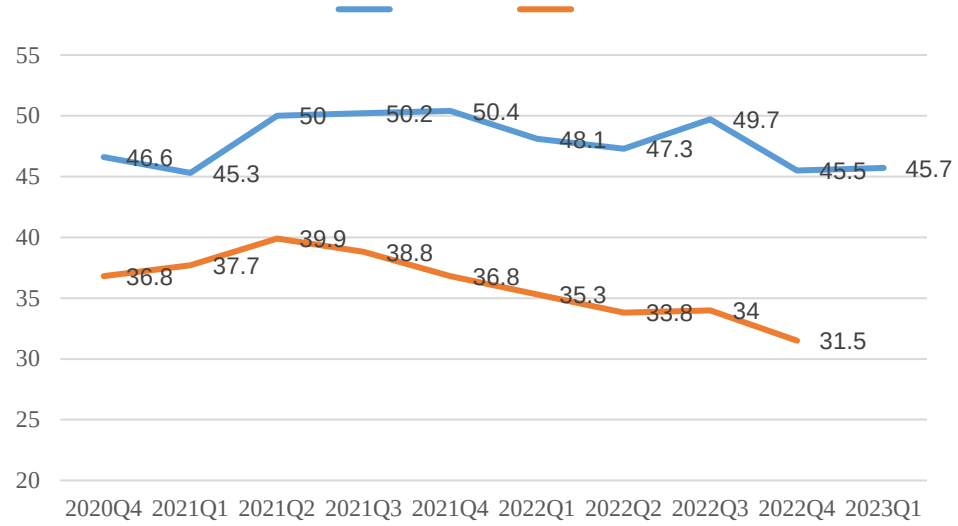
19.8 25% 25.9

75% 32.8

2022 **2023**

1.

2022 31.5% 34%
2.5 2020 2023
45.7% 2022
66



66 2022 **2023**

67
38.5% 45%

2023

68

46.7% 46.0% 45.7% 45.1% 44.8% 44.0%
43.6% 48.7%

2023

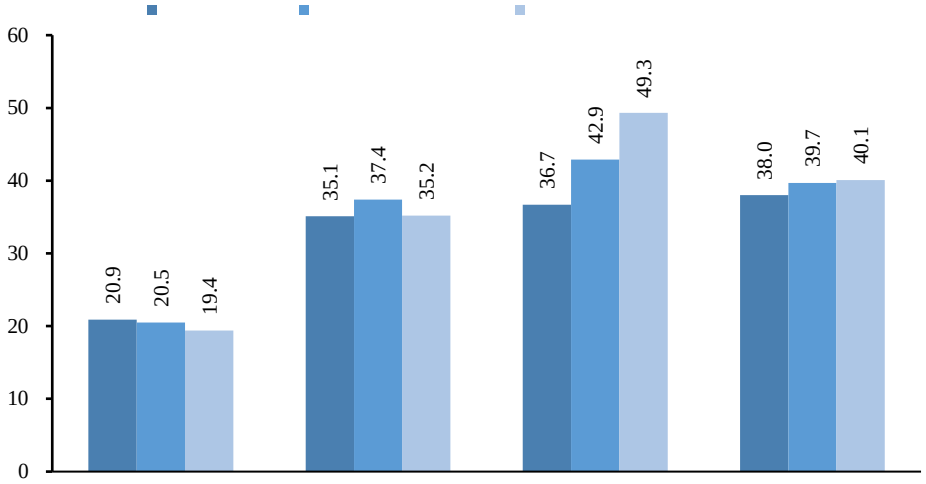
67 2022

68 2023

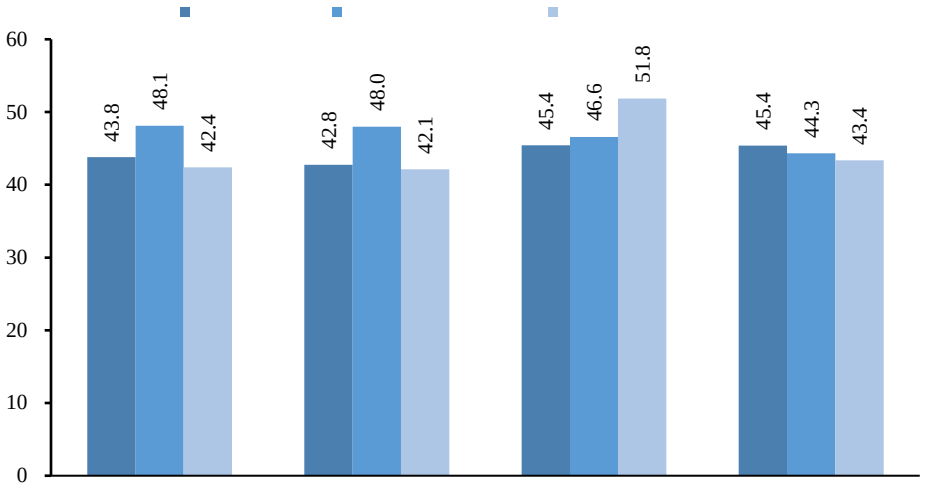
2.

69

70



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

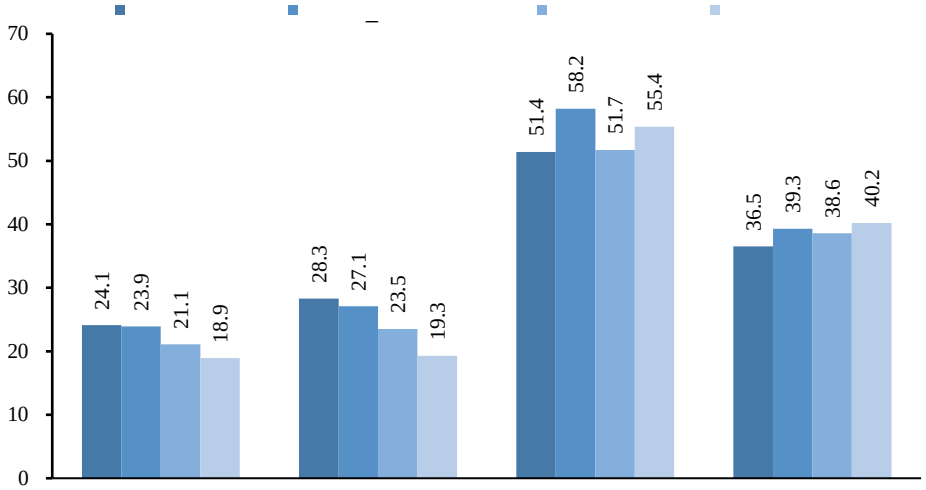


4 70 2023 ª 6 ™ Ü E ä5 :[ù = ¦ <N¯ = ¦ Æ <# Â2± Á

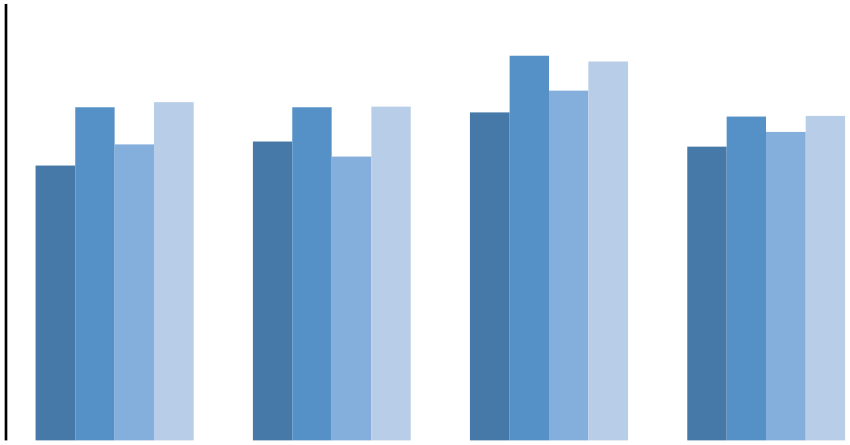
71

20

72



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



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

3.

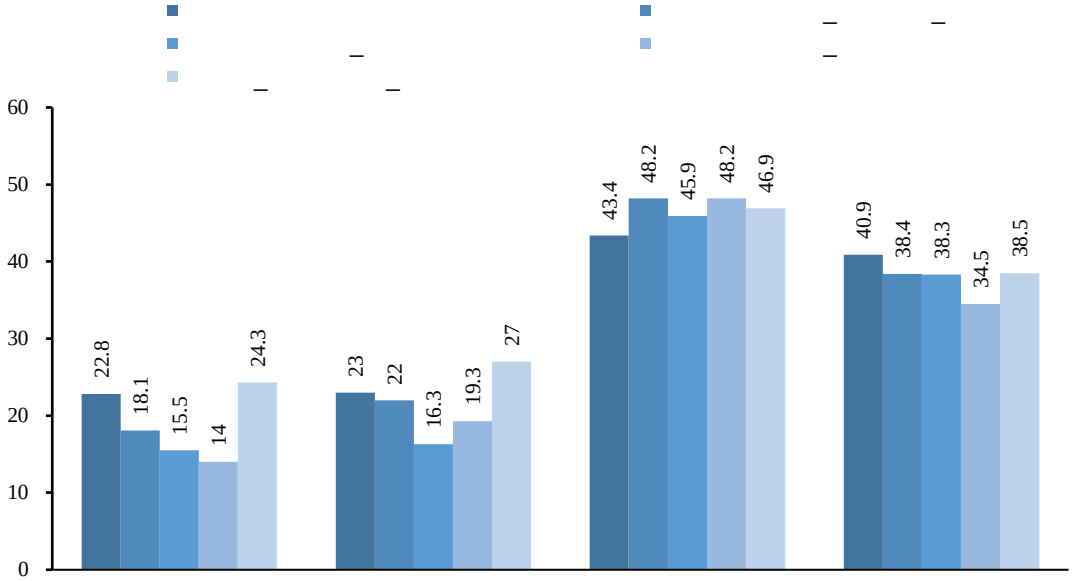
2022 12

15.9%

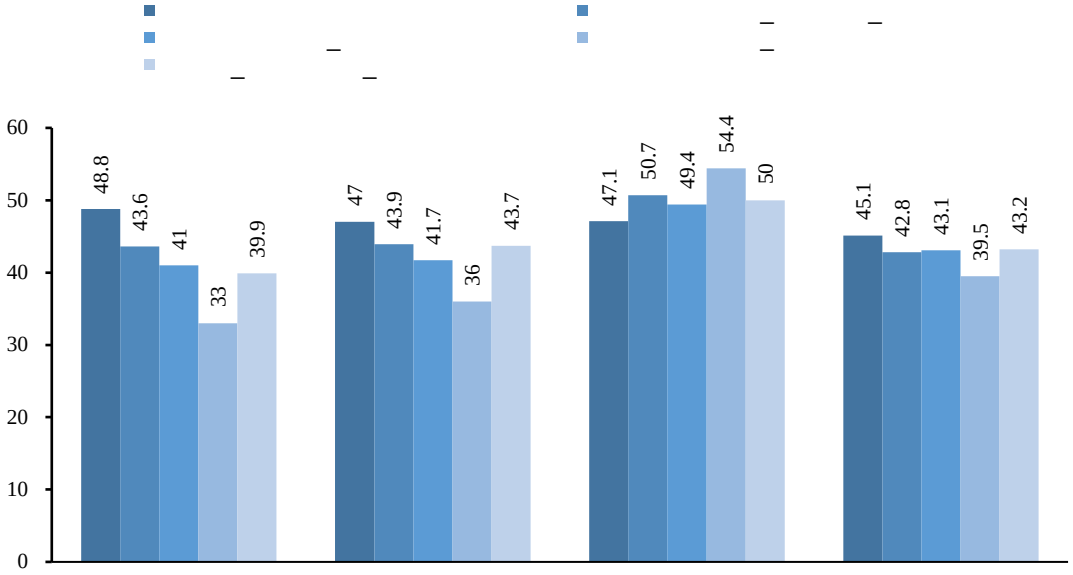
19.2% 39.2%

40.5% 75

75



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

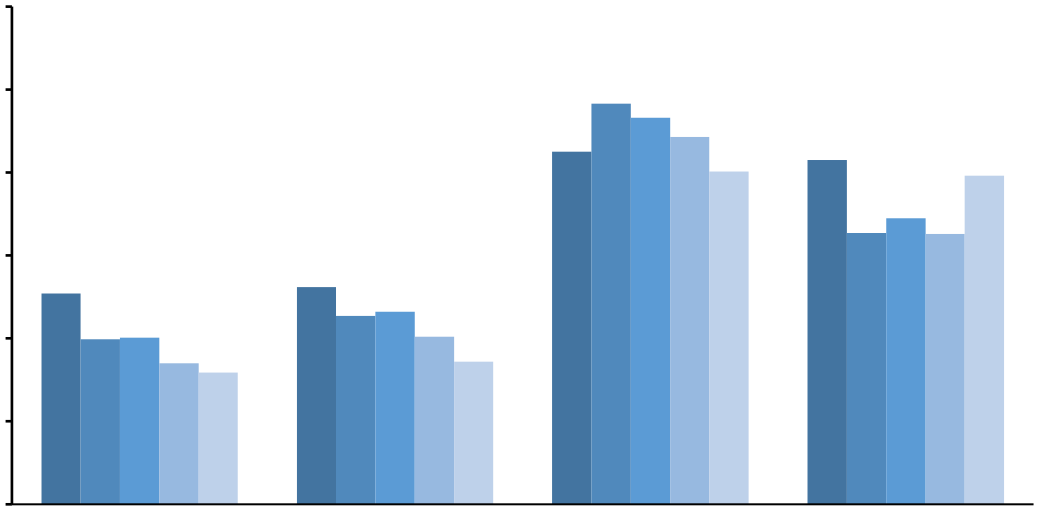
77

U 76%

U

76%

78 “ ”

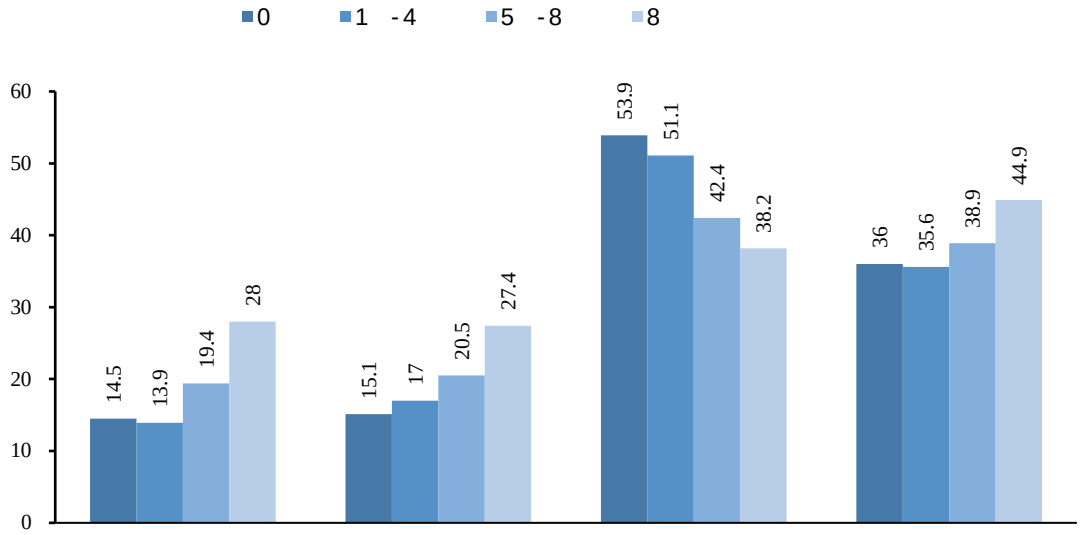


4 77 2022 ª ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ ÆLý Ž U " Á

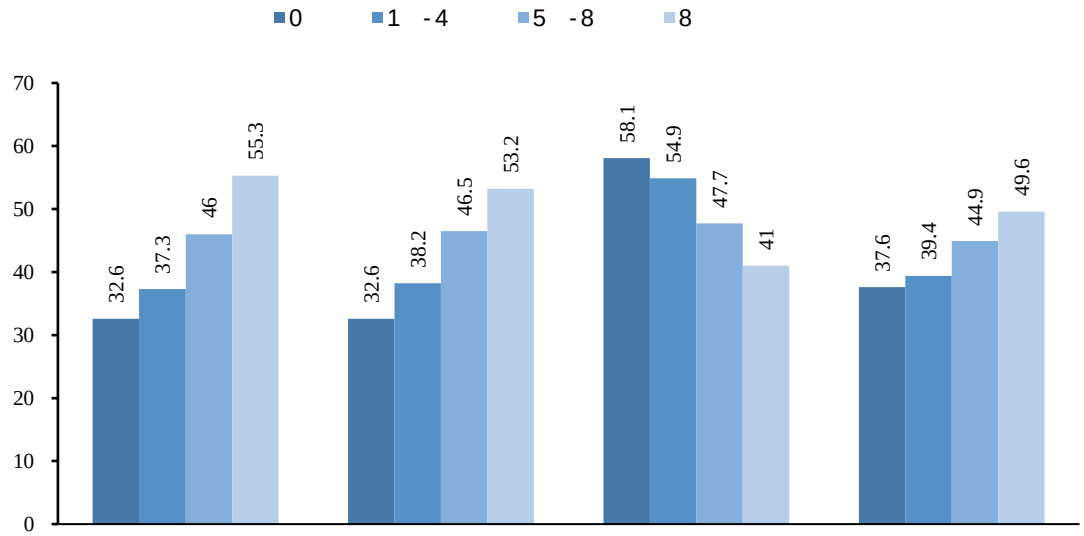
4 78 2023 ª 6 ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ ÆLý Ž U " Á

2022 10 2

79 80



4 79 2022 ª ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ Æ 6 P ž ¦



4 80 2023 ª 6 ™ Ü E ä5 :[ÔL{>ž)æ <N¯ = ¦ Æ 6 P ž ¦

2023 9 8

2023

2022

2023 1

2023 1 30 2 3

5176

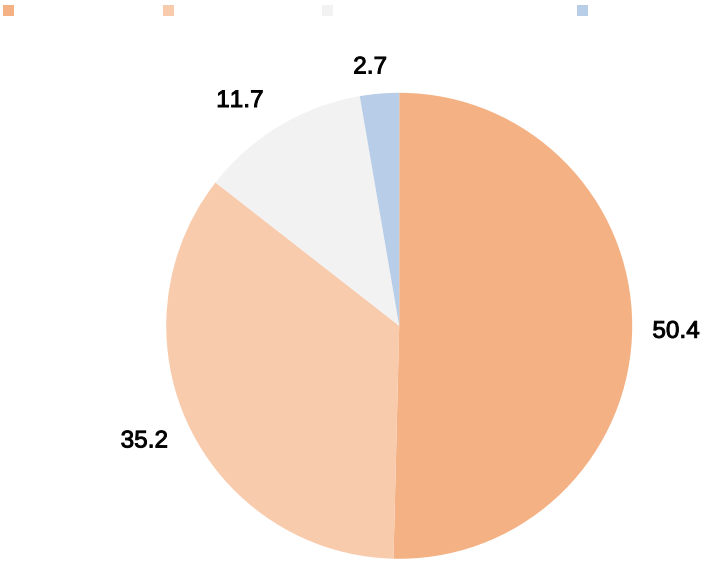
1. 2023

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

“ ” 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

2022

2022

2022 80

2022 2023

2023
45.7% 43.6%
48.7%
2022 46.7% 46.0% 45.7% 45.1% 44.8% 44.0%

U

2023

84% 2023

2023 1 50%
35% 84%

2023 78.5% 2023

50% 4

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6 2023

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2022

2023 **2023**

2022 “ ”

“ ”

2022 1182 “ ”

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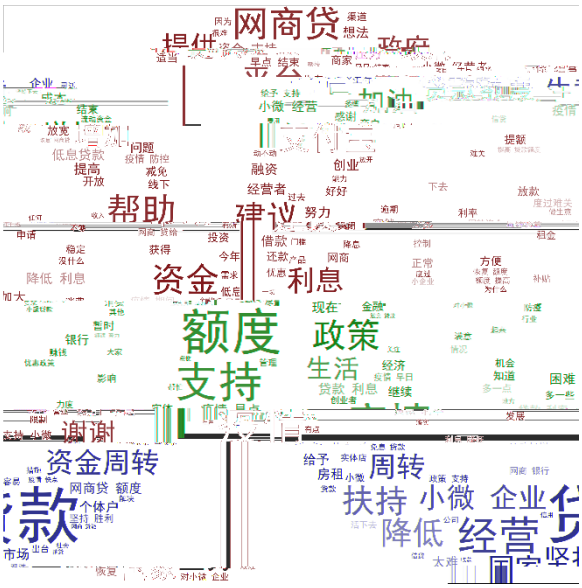


1 2022

7 52% 69%

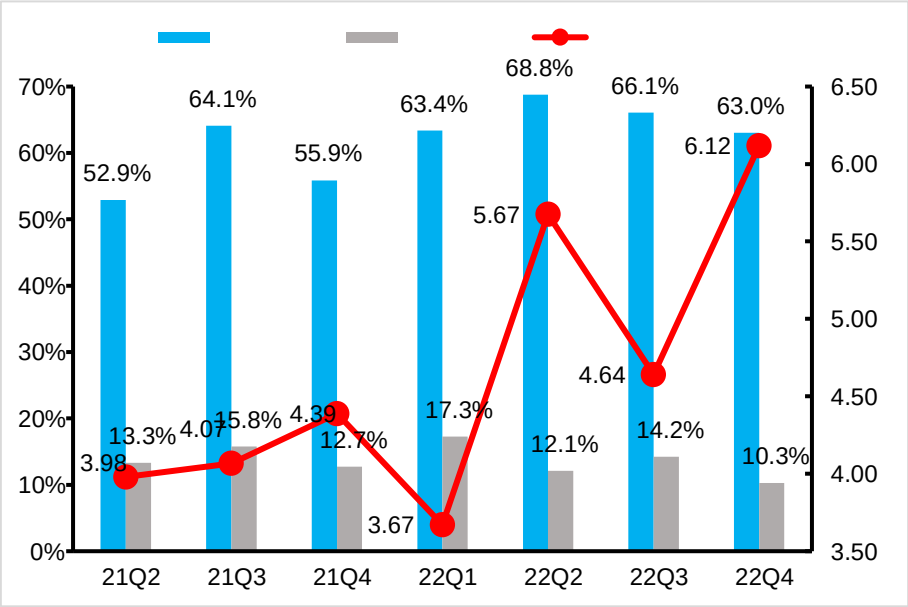
10% 17% 3.6 6.1

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
4.39
4.07
3.98
3.67
13.3%
15.8%
12.7%
17.3%
12.1%
14.2%
10.3%
21Q2
21Q3
21Q4
22Q1
22Q2
22Q3
22Q4

2

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