

2022

2022

Online Survey of Micro-

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

<https://www.dfor.org.cn/research/confidencedata>

2020

2021

2022 3

“ ”

3

60% 37% 83%

4

10%
63.2% 3.2

10%

5

2022

		.....	7
		.....	7
		.....	8
		.....	10
		.....	10
1.		.....	10
2.		.....	10
3.		.....	11
		.....	14
1.		.....	14
2.		.....	16
3.		.....	17
		.....	19
		.....	21
1.	2/3	.....	21
2.		.....	23
3.	10%	.....	24
2022		.....	27
1.	2022	.....	27
2.		.....	28
		.....	31
“	”	.....	33

2022 3

1

16529

2020 9

2

“

”(Enterprise Survey for Innovation and Entrepreneurship in China

ESIEC)³

ESIEC 2020

2 5 8 2021 7-8

1

2017

1000

90

2000

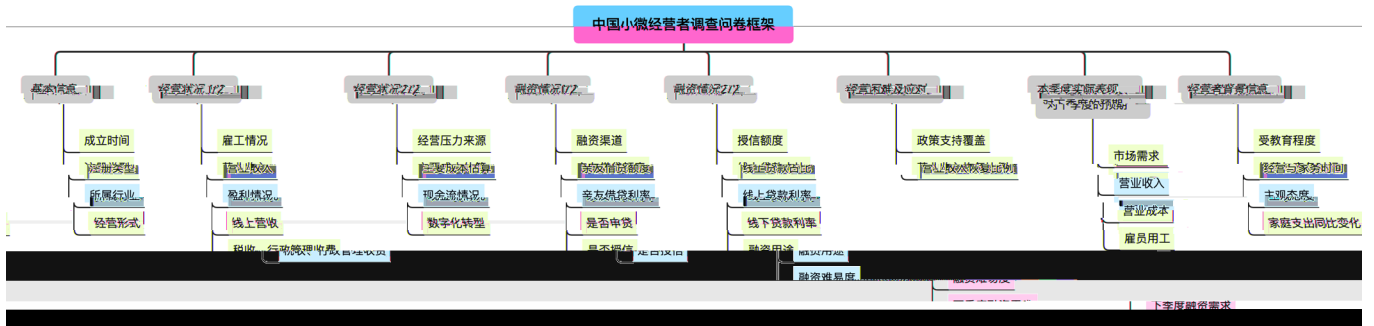
2

“

”

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.

³ <https://www.iss.pku.edu.cn/sjsj/zgqycxycsesiecxm/index.htm>



2022

4

49.8%

38.1%

80.2%

12.1%

2022

4.3

81.1%

1 5

11.7%

7.2%

80 90

“ ”

2.5

26.4%

19.2%

58.1%

30.8%

11.1%

1

1-4

4.3	1.0	38.1%	42.1%
2.8	0.0	50.8%	36.2%
3.3	2.0	34.7%	49.0%
13.0	5.0	12.2%	32.1%

4 2020 2021
<https://www.dfor.org.cn/research/confidencedata#news>

5 300 300

2021
 4.4 5.5 4.6 4.3

2

“ ”

17.0%

29.6%

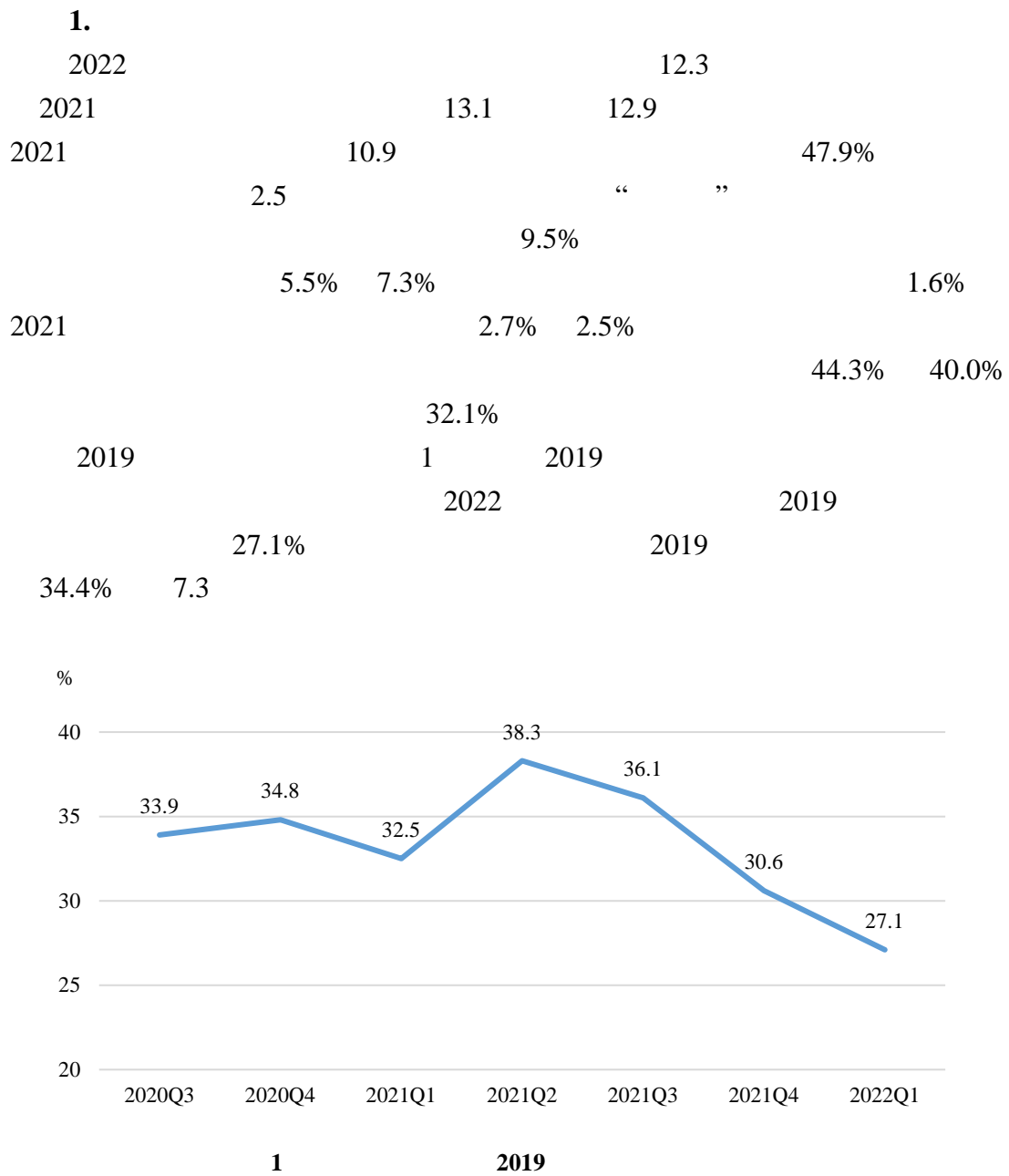
20.5% ⁶

2

	%			
	1	2	3	4
	83.0	14.2	1.2	1.6
	70.4	23.8	3.2	2.6
	79.5	17.1	1.3	2.1
	86.3	11.5	1.0	1.2
	83.0	14.5	0.5	2.1

⁶

https://www.thepaper.cn/newsDetail_forward_10580766



2.

2.4 2021 0.3 3
 2021 2.6

0.2

1

2

2021

38.2%

30.0%

8

2021

2.6-2.7

2.4-2.5

3

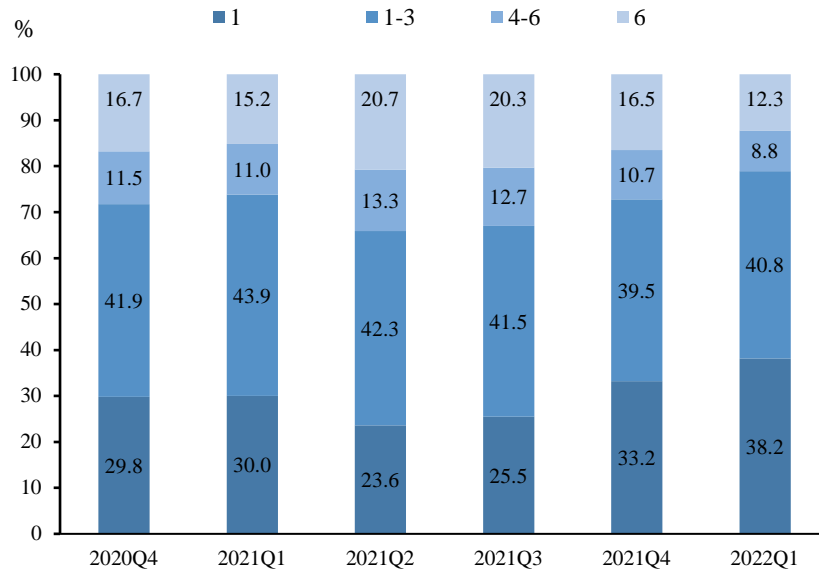
10.4%

11.2%

7.8%

3

	2020Q3	2020Q4	2021Q1	2021Q2	2021Q3	2021Q4	2022Q1
	2.9	2.7	2.6	3.0	2.9	2.7	2.4
	2.8	2.8	2.6	2.9	2.9	2.7	2.4
	2.9	2.7	2.6	3.1	3.0	2.6	2.3
	3.0	2.8	2.7	3.1	3.0	2.7	2.5



2

3.

13.1

0.1% 2.3

2021

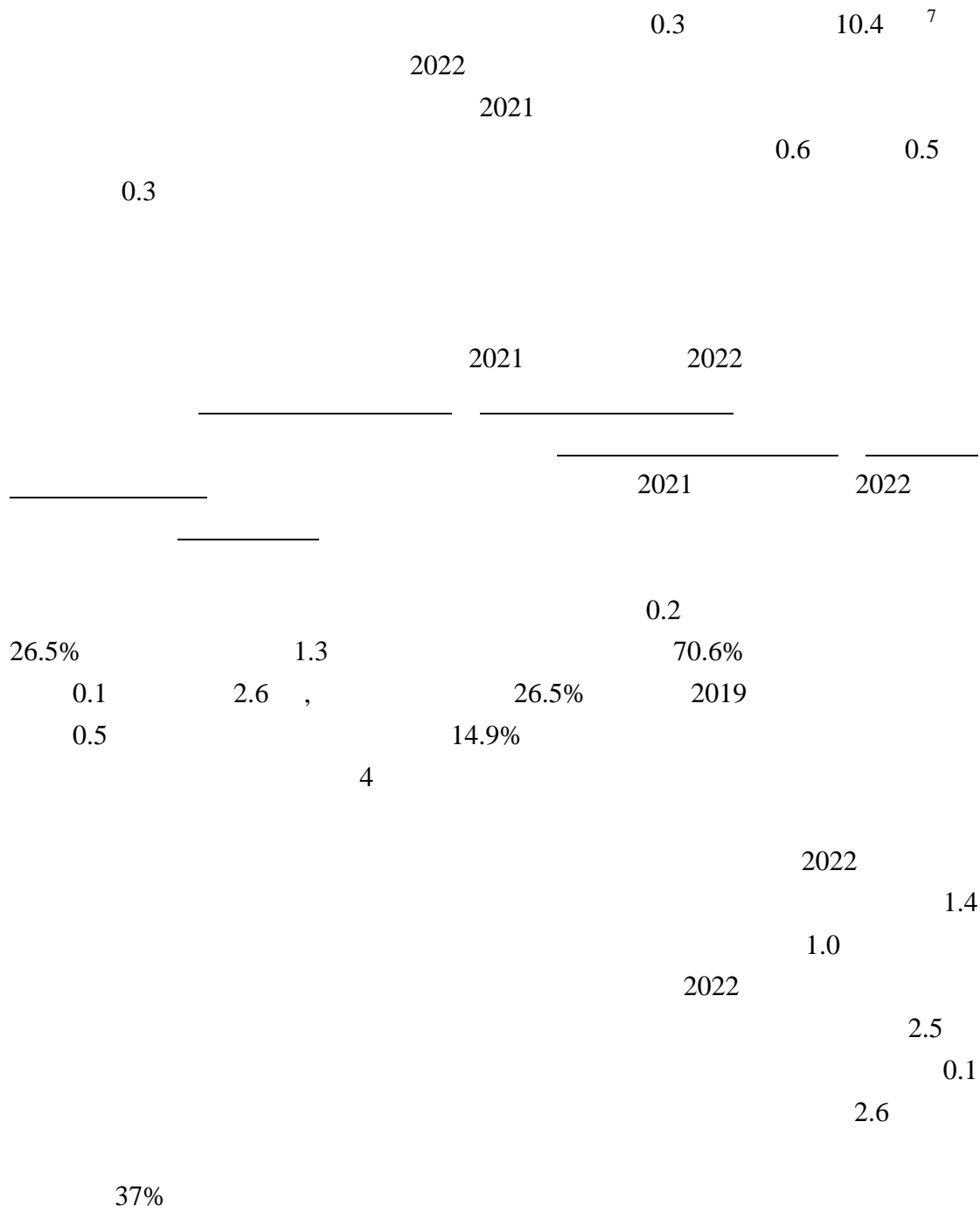
13.9

1.8% 2.6

4

0.8

1.8



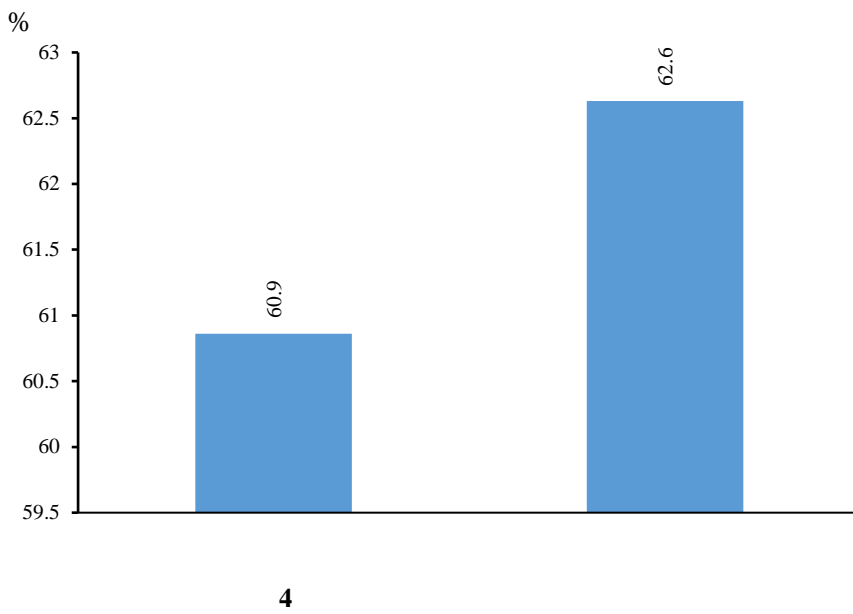
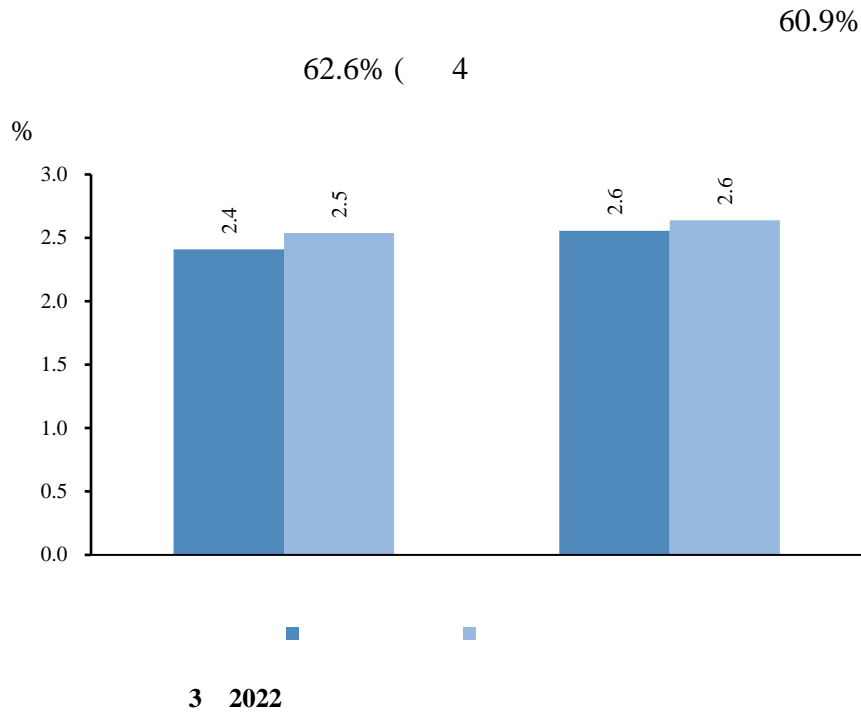
4 2022

		22Q1		22Q1					
		21Q4	22Q1	21Q4	22Q1				
		12.6	12.0	-0.6	13.9	13.1	-0.8	-0.2	26.5%
	%	2.7	2.1	-0.5	1.8	0.1	-1.8	-1.3	70.6%
		2.7	2.4	-0.3	2.6	2.3	-0.3	-0.1	26.5%
2019	%	30.2	27.5	-2.7	29.3	26.1	-3.2	-0.5	14.9%
		21.5	21.4	-0.1	20.5	23.0	2.5	2.6	104.0%

⁷ $(2.6-2.3) \times 365 \div 12 \approx 10.4$

3

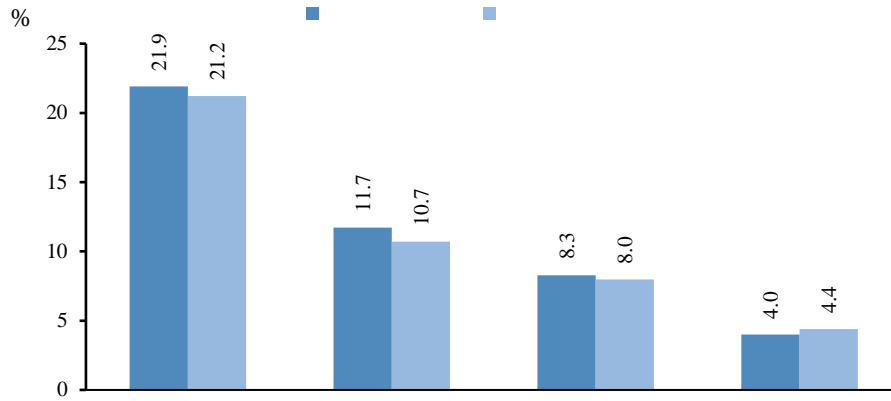
8



8

" " 100 " " 0 " " 50 50 50
0-50

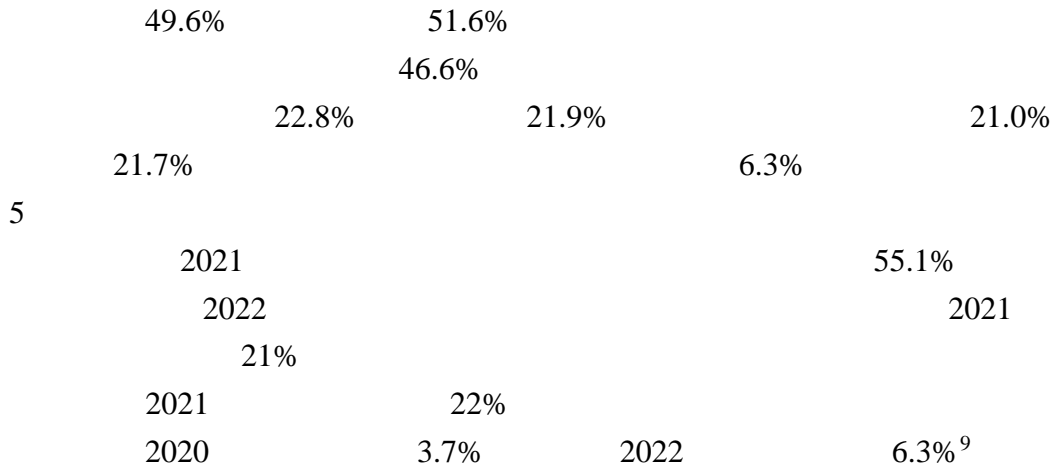
5



5

1.

2022



5

5

	2021Q1	2021Q2	2021Q3	2021Q4	2022Q1
	55.1	47.9	47.1	49.6	51.5
	48.6	46.9	45.4	46.5	46.5
	20.8	21.9	21.9	21.0	21.7
	17.9	17.3	22.8	22.8	21.8
	4.8	5.1	5.3	5.5	6.4
	3.4	5.1	5.1	5.2	4.9

⁹ 2021

6

51.5% 58.3%

26.7%

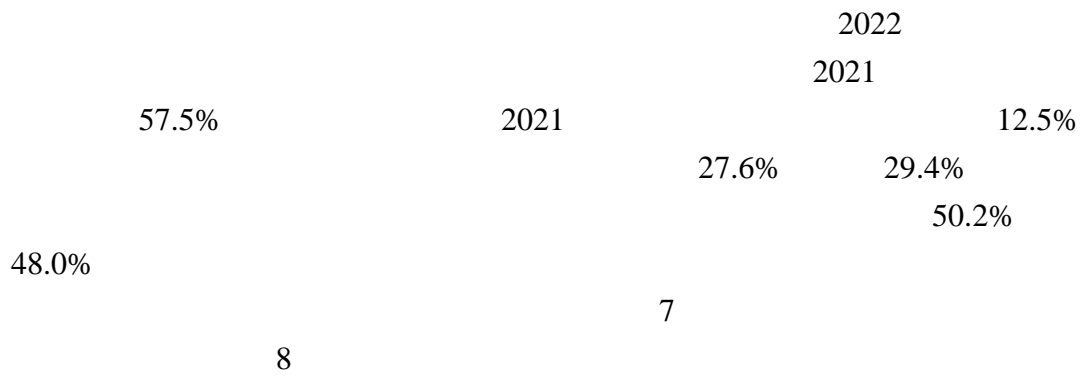
6 2022					%
51.6	51.5	58.3	50.7	38.1	
46.6	41.4	44.6	47.3	47.7	
21.7	19.0	19.7	22.4	21.4	
21.9	24.5	22.5	21.4	26.7	
6.3	7.9	6.5	6.2	9.2	
4.9	5.2	4.1	5.0	5.3	

6

20

6 2022

2.



7	2021	2022			%	
		2021Q1	2021Q2	2021Q3	2021Q4	2022Q1
		40.9	50.3	55.3	55.5	57.5
		53.1	49.3	43.4	50.2	48.0
		33.3	32.1	31.2	27.6	29.4
		8.8	9.0	13.0	12.6	12.7
		14.7	12.2	11.6		

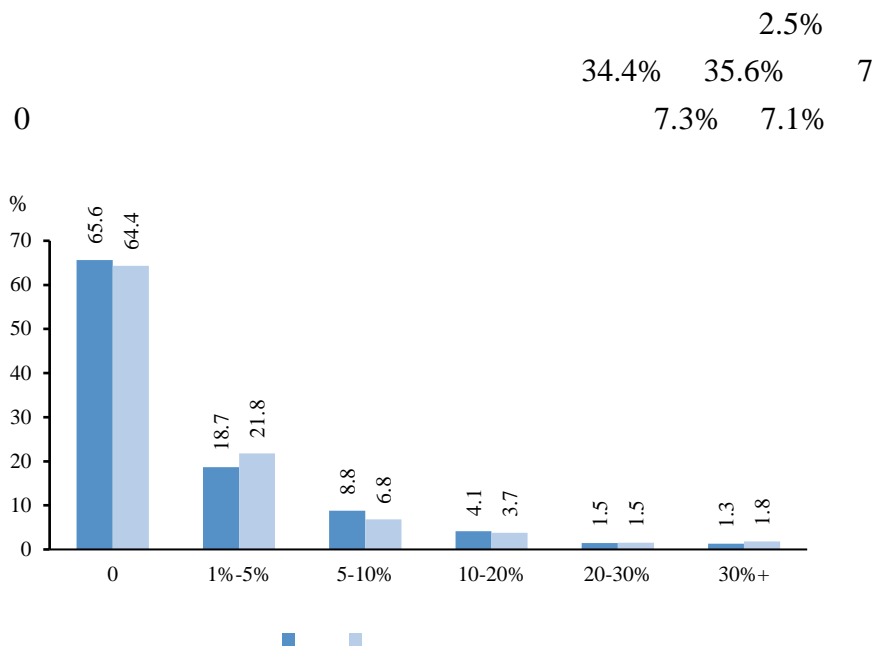
9	2022	%				
	0	1-4	5-7	8-19	19	
	60.4	59.4	52.4	48.7	43.2	
	57.4	43.6	41.8	42.1	35.8	
	5.4	36.3	49.7	57.9	64.2	
	13.9	13.0	8.7	11.7	10.5	
	10.3	9.8	11.6	12.3	11.7	
	15.5	10.3	9.5	5.4	8.6	
	7.0	4.6	5.3	3.8	5.6	
	1.9	2.1	2.1	3.2	3.7	

3.

2022

"

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7 2022

8

0.9%

9.2%

7.8%

1.4%

20

8 2022

9

9 2022

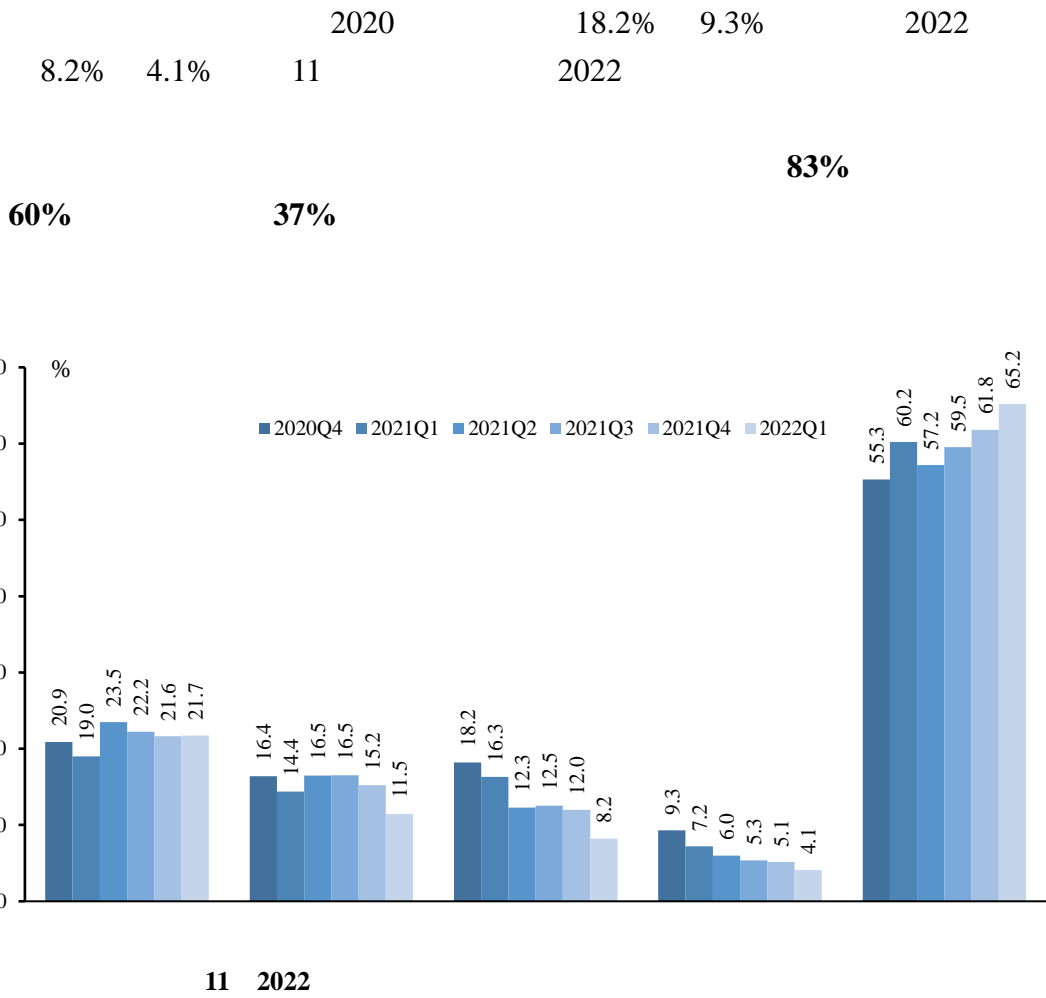
10 2022

10

10

2020

2022



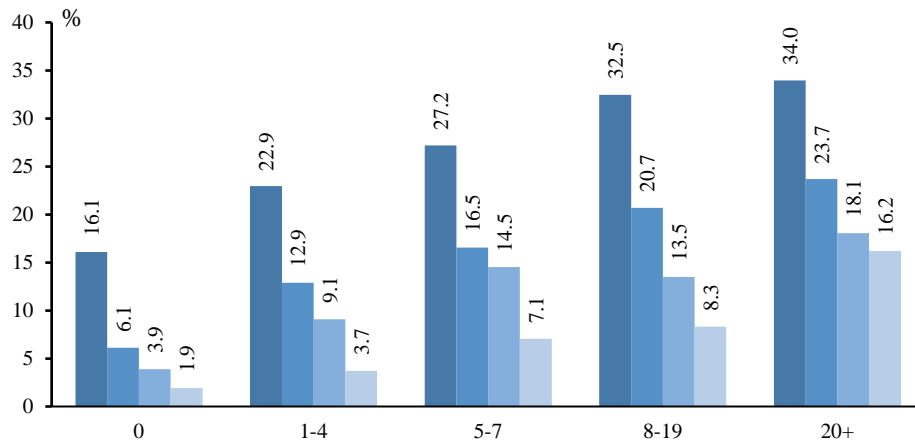
12

12 2022

10

13

13 2022



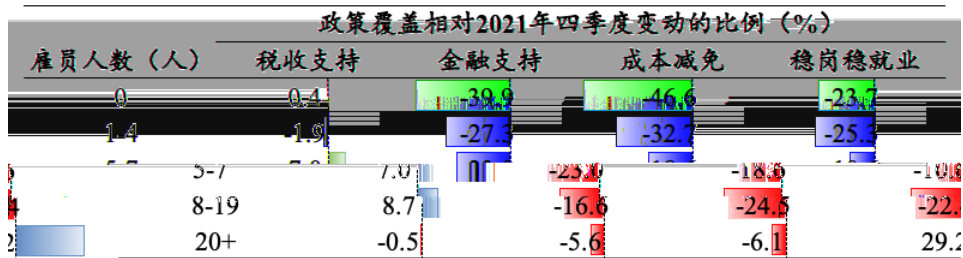
14 2022

2022
2021

10

10 2022

2021



1.

2/3

2022

63.2%

3.2

49.6%

24.7%

1.1

2021

9.1

15.1%

7.1

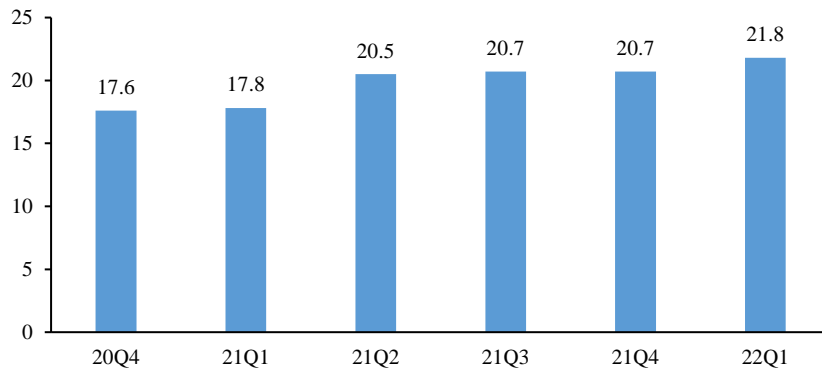
11

11 2022				%			
2020Q3	2020Q4	2021Q1	2021Q2	2021Q3	2021Q4	2022Q1	
49.8	50.7	42.1	48.9	48.1	49.4	49.6	
26.3	24.6	33.8	27.2	28.2	25.8	24.7	
12.5	13.5	11.7	11.8	12.6	8.0	15.1	
8.9	8.4	10.1	9.2	8.4	14.1	7.7	
1.7	1.7	1.3	1.8	1.6	1.5	1.3	
0.8	1.1	1.0	1.1	1.1	1.2	1.6	

15
2022

2020
2022

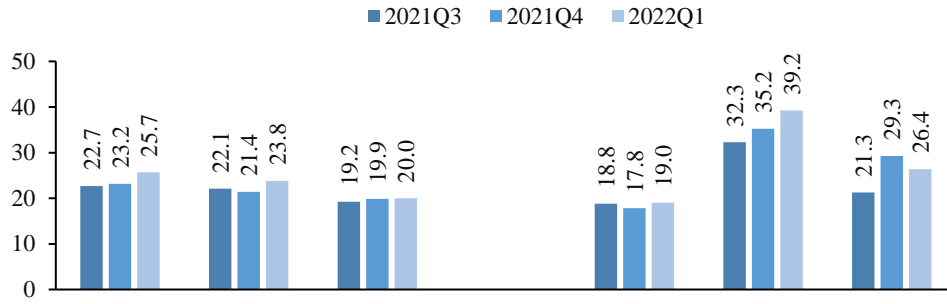
2021



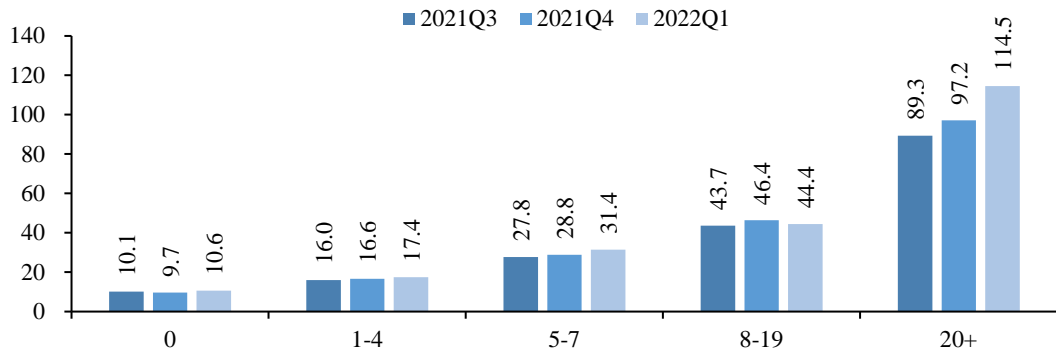
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8-19

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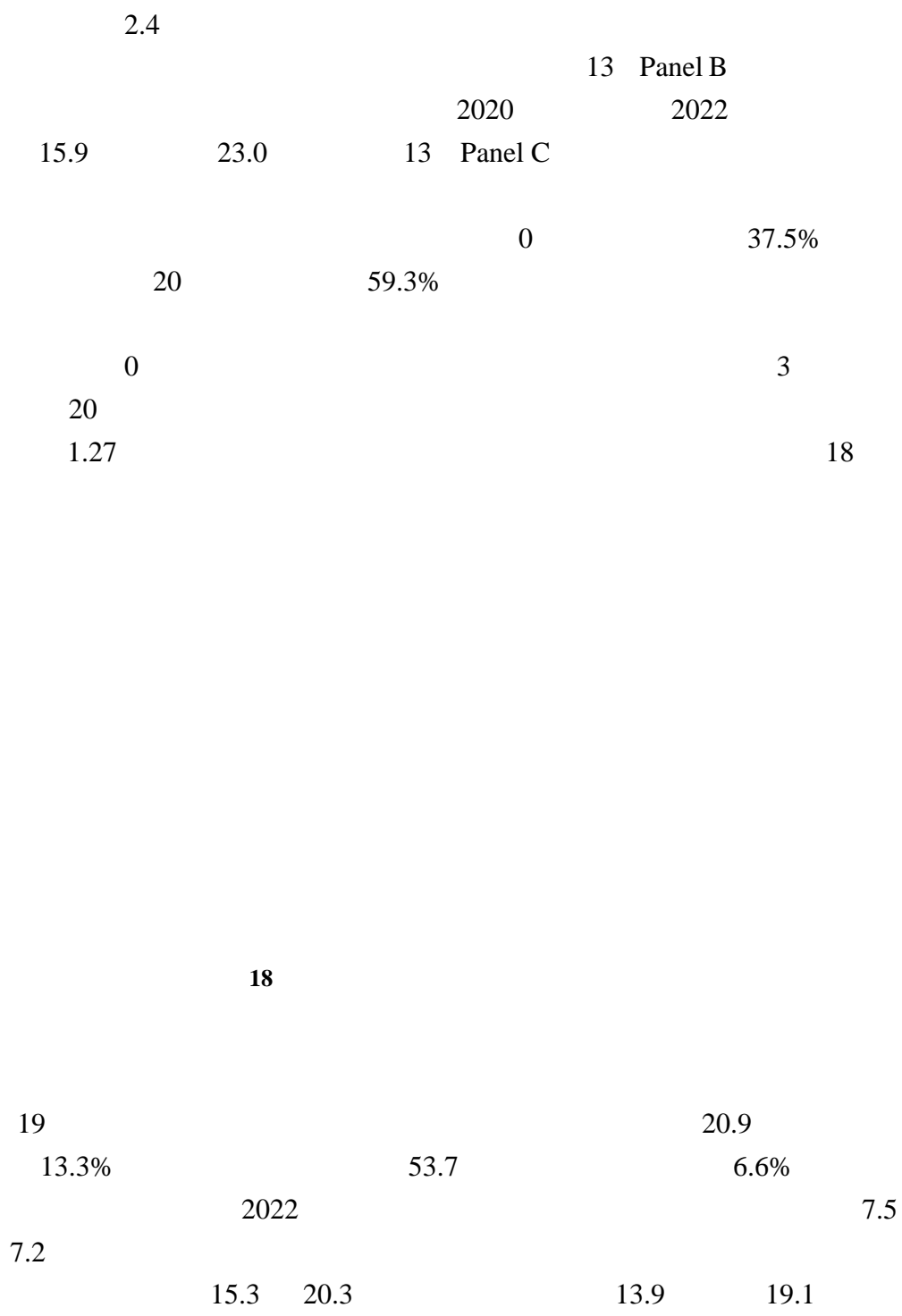


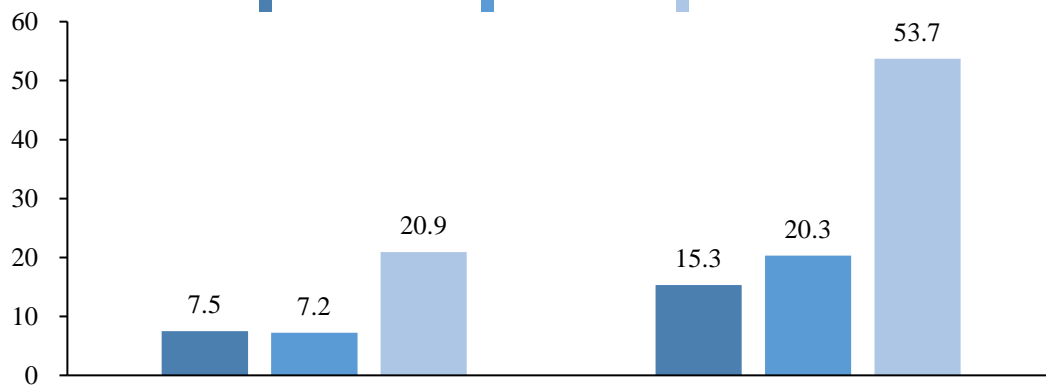
17

2.

“ 2021 ” 2021 14 19.5% 2022 12 2022 24.4% 10% 14%-18%

							%
2020Q3	2020Q4	2021Q1	2021Q2	2021Q3	2021Q4	2021Q1	
38.6	36.5	37.8	31.3	30.9	33.6	36.8	



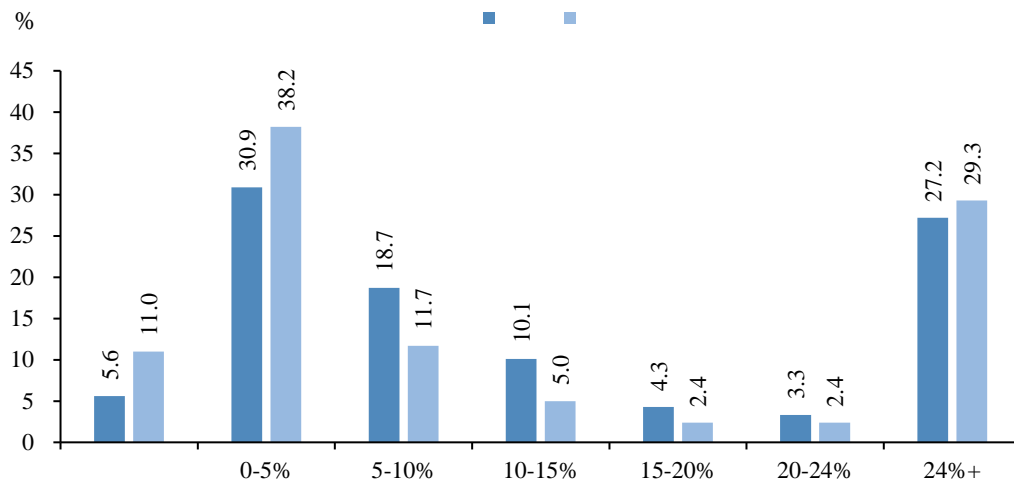


19

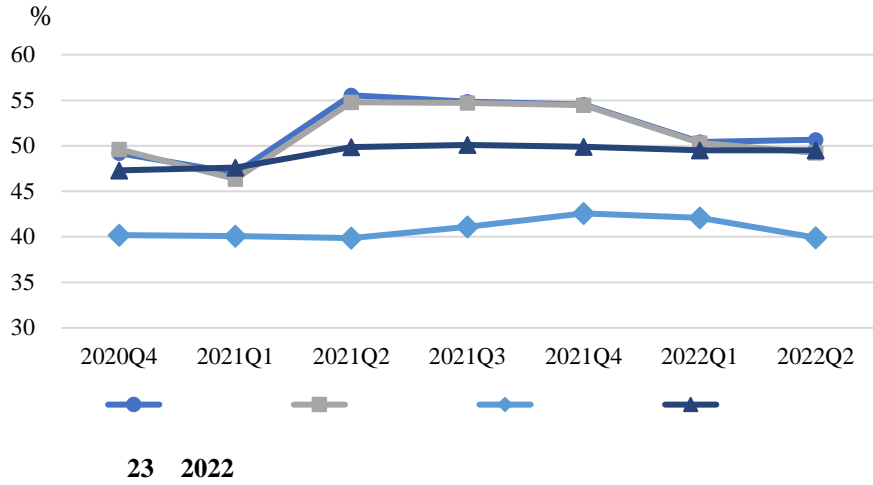
14
8.6%
2022
6.6%
14
20

14

	20Q4	21Q1	21Q2	21Q3	21Q4	22Q1
%	7.8	7.4	7.9	8.2	8.6	8.6
%	6.1	5.9	6.4	6.5	6.8	6.6



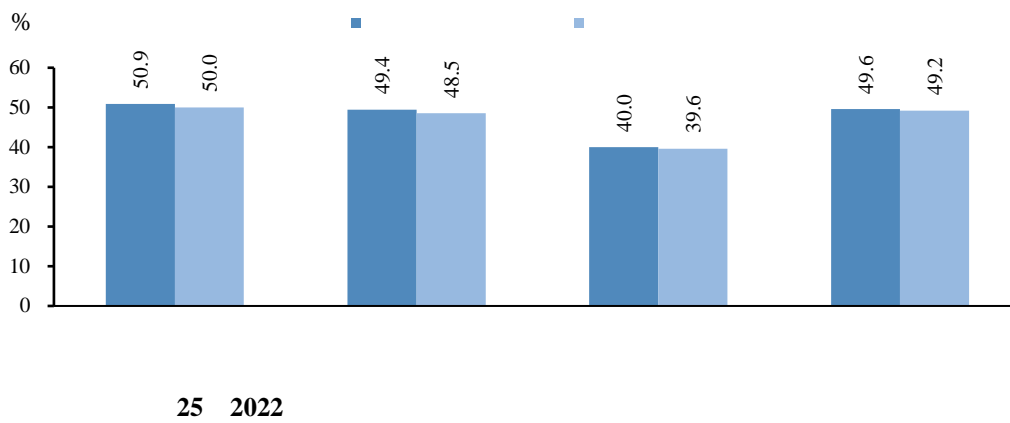
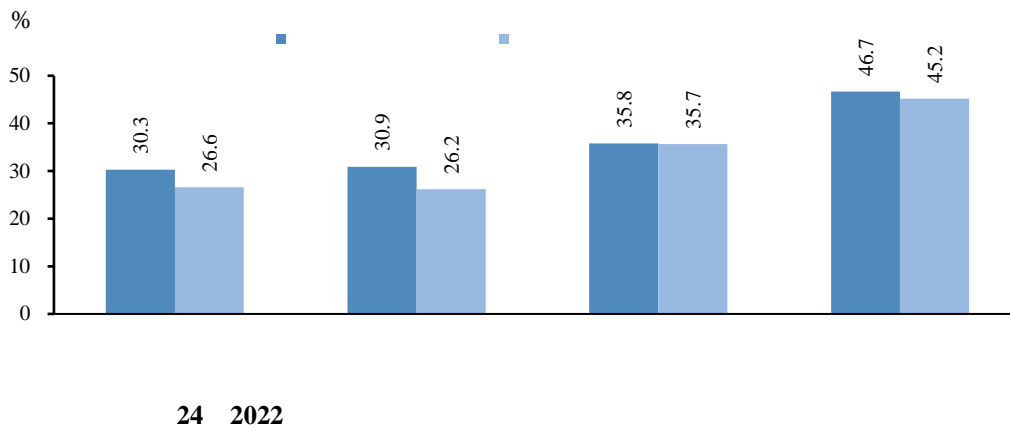
20 2022



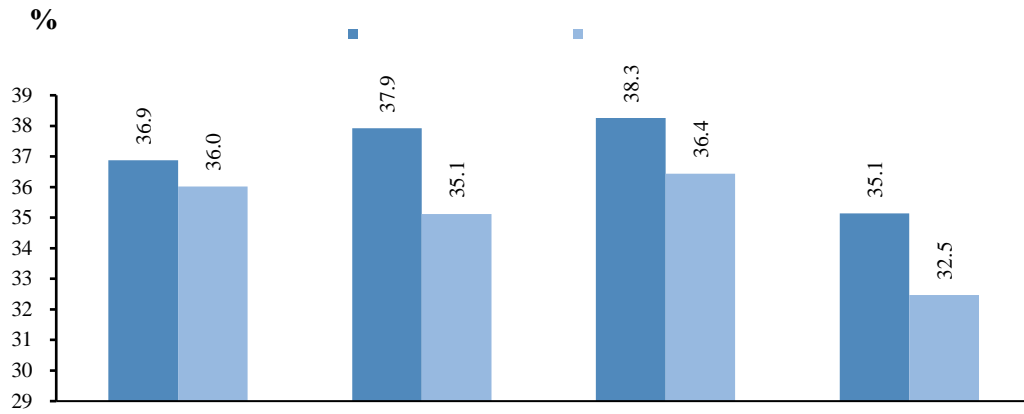
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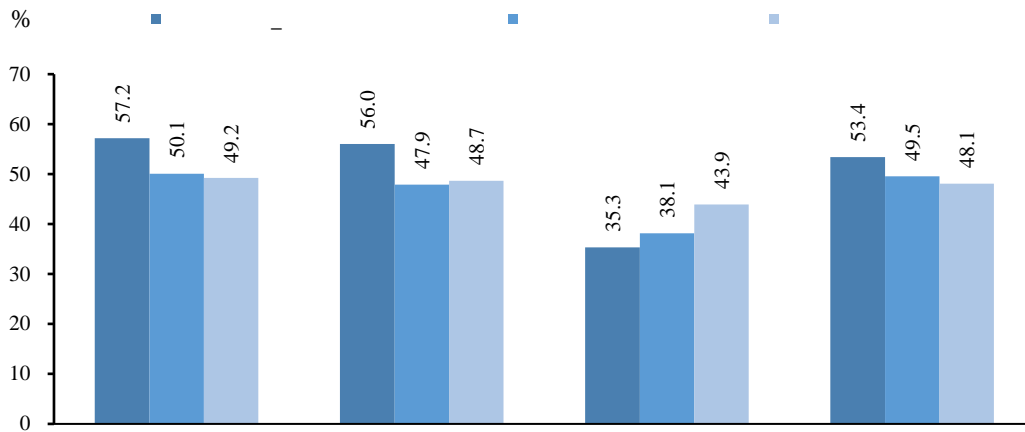


26



26 2022

27

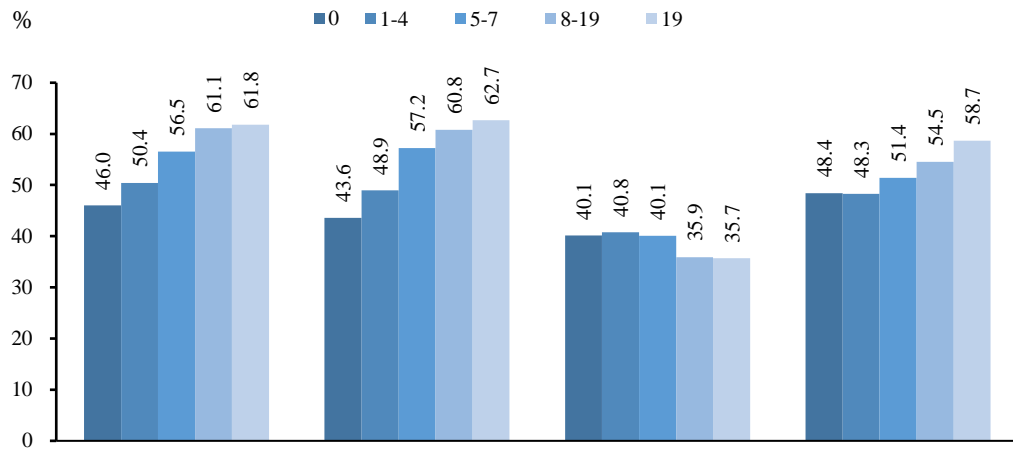


27 2022

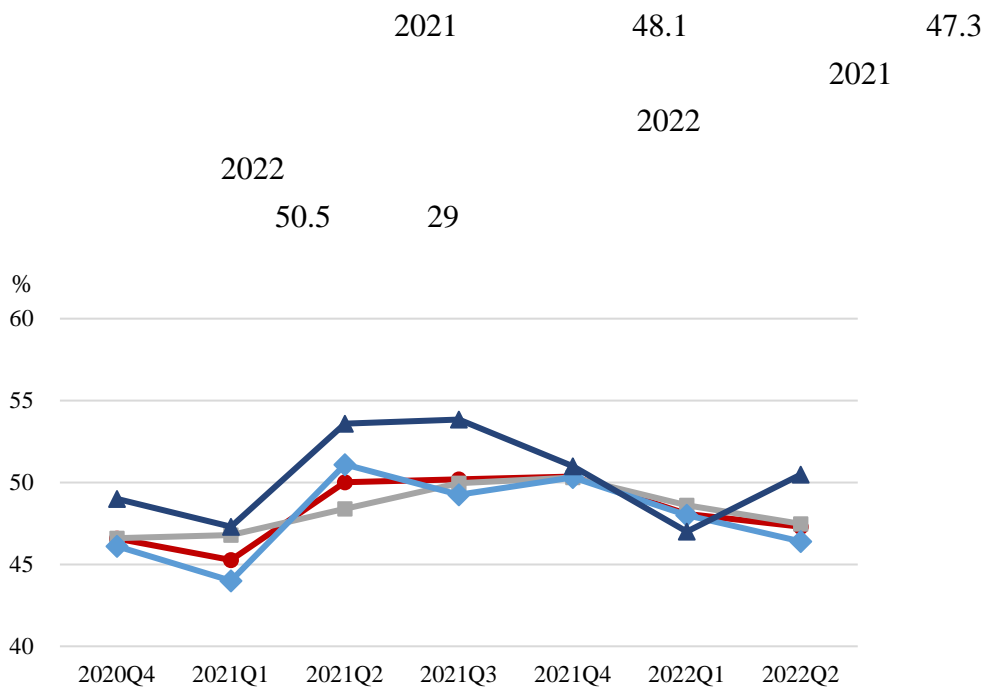
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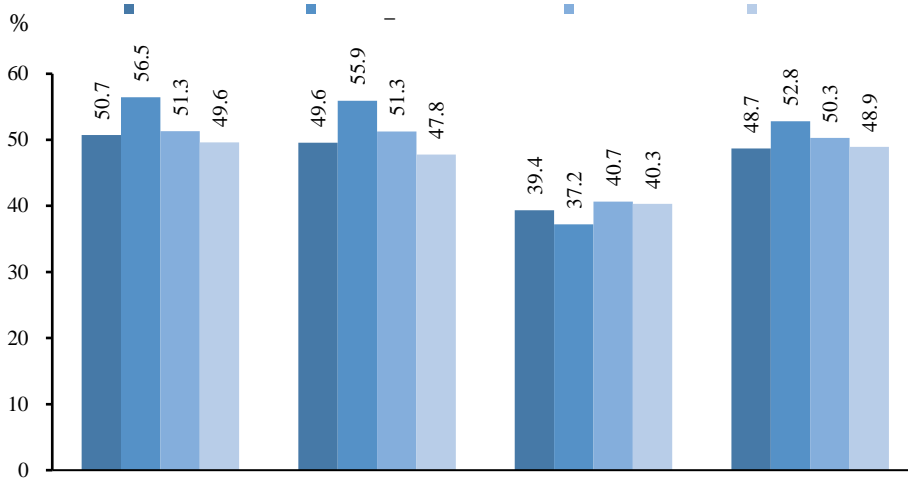


28 2022



29 2022

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30 2022

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2019

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