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商业环境： 巨大、巨变、巨复杂

CHINA'S DISRUPTORS

China's economic scale and dynamic business environment make it the main contender with the United States to produce a rival to Google, Facebook or Twitter. In this excerpt from Edward Tse's new book *China's Disruptors: How Alibaba, Xiaomi, Tencent, and Other Companies Are Changing the Rules of Business*, Tse looks at some of the key milestones China's home-grown e-commerce giants have passed, and how they will likely shape global consumer trends.

中国的经济实力及其生机勃勃的商业环境令中国市场有能力培植与美国一争高下，与谷歌、脸书、推特等公司分庭抗礼的竞争强手。本文摘自谢祖墀（Edward Tse）新书《中国科技新世代的革命者：阿里巴巴、小米、腾讯等公司如何改变商业规则》。作者检视了中国本土的电商巨无霸不断取得的重大成就，并探讨为何他们可能引领全球消费者大趋势的潜力。

To understand the achievements of these entrepreneurs, we need look no further than China's business environment. China is the only country with the economic scale and robust activity to match that of the United States. Unlike the United States, however, China is still at a relatively early stage of economic development. Its markets have progressively opened wider, and much basic infrastructure has been put in place, but its business environment is still raw and volatile, with a rate of change and pace of activity that is rivalled possibly only by Silicon Valley.

Because of the size of its market, China is the only country likely to produce a rival to Google, Facebook, or Twitter just by building on business established in its home country. Tencent's WeChat, a social networking tool similar at its core to U.S.-based messaging service WhatsApp, had nearly 440 million users in mid 2014 (up from 240 million a year earlier), not far behind WhatsApp's 500 million.

Alibaba, likewise, thanks to the nearly US\$250 billion of business conducted through its various web sites in 2013 (a figure forecast to rise to around \$350 billion in 2014), looks set to become the world's first non-American e-commerce giant.

China will also shape worldwide trends with physical as well as virtual goods. In 2010, it overtook the United States to become the world's biggest manufacturer. As products made in China become more sophisticated and companies embrace more domestically developed technology, it will increasingly be Chinese goods and Chinese consumers that set global standards and preferences. If, as is likely in the near future, Chinese entrepreneurs create a \$50 smartphone, or cost-effective solar energy, or mass-produced electric cars, then these offerings will rapidly appear around the world.

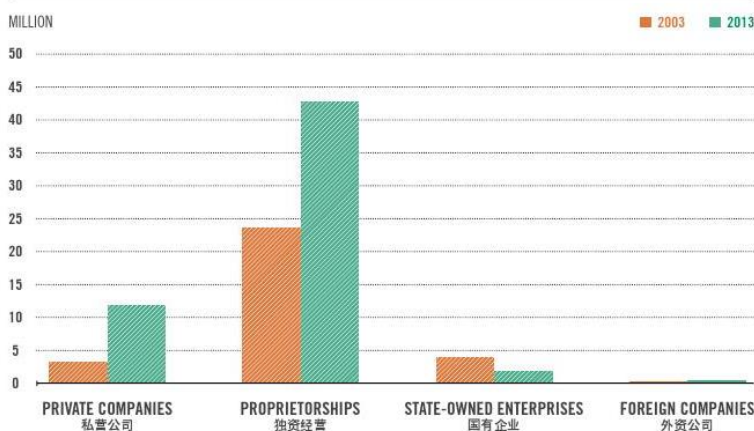
On top of its scale and rate of change, China is also hugely complex. Its entrepreneurs have to cope with a country whose markets are not

要理解这些企业家的成就，我们还要进一步看看中国的商业环境。要论经济规模及活跃度，中国是唯一能与美国相提并论的。不过与美国不同的是，中国相对而言尚处于发展初期。虽然市场日益开放，基础设施逐步完善，但商业环境仍然比较原始，并且不稳定。可以这么说，中国商业环境所经历的变化和进步，只有硅谷能与之比肩。

由于国内市场规模庞大，所以只要根植国内市场，就能培养出足以与Google（谷歌）、Facebook（脸书网）和Twitter（推特网）等大公司相抗衡的企业，这恐怕也只有中国才能做到了。腾讯公司的微信（与美国的WhatsApp软件相似）在2013年年中拥有2.4亿用户，而在2014年年中，这个数字已经接近4.4亿。要知道，这距离WhatsApp的5亿用户已经不远。同样，2013年，阿里巴巴各种线上平台的总体营收约为2500亿美元（据预测，2014年将达到3500亿美元），看来其对于成为美国之外的第一电商巨头志在必得。

不仅如此，在实体经济领域，中国也将引导世界潮流。2010年，中国已经超过美国，成

FIGURE 1: NUMBER OF CHINESE COMPANIES BY OWNERSHIP, 2003 AND 2013
图1：2003年及2013年中国企业拥有权数据图

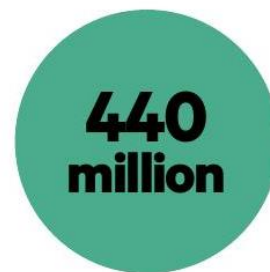


just large and fast-growing, but also at very different stages of development both in different regions of China and often within the same region. Given the speed with which Chinese buying power is rising, products, technologies, and business models often leapfrog entire stages of development. In poorer regions, for example, people can find themselves going from shopping in markets and small family-owned stores to using smartphones to shop online with no intermediate stage. Chinese consumers, presented with a bewildering range of products

Most Chinese show little brand loyalty, whether shopping for everyday goods or big-ticket items.

from domestic, Asian, and multinational brands, are also perhaps the world's most fickle customers. Studies of consumer behaviour have repeatedly found that most Chinese show little brand loyalty, whether shopping for everyday goods or big-ticket items. A 2014 survey of 2,400 drivers carried out by the Boston Consulting Group, for example, found that three-quarters planned to switch brands when buying their next car.

And yet, unique as China is in both the size and complexity of its market, I also believe that it is in many ways a harbinger of how the world's business environment will evolve. The main reason for this is technology, especially the ways in which the internet is bringing down barriers between industries and increasing cross-sector competition. To survive, businesses must look to find new sources of advantage wherever they can, even if this means moving beyond their traditional areas of expertise. Because of the relatively undeveloped nature of its economy, the competitive landscape in China is more fluid than it is in Europe, North America, or Japan. Retailing, for example, is being turned on its head as e-commerce allows shoppers, even in China's most remote regions, to gain access to goods long before stores can build out chains of brick-and-mortar outlets. The country's e-commerce giants are moving into finance, offering money-market products that offer higher interest rates than banks can. Chinese



China's WeChat had nearly 440 million users in mid-2014.

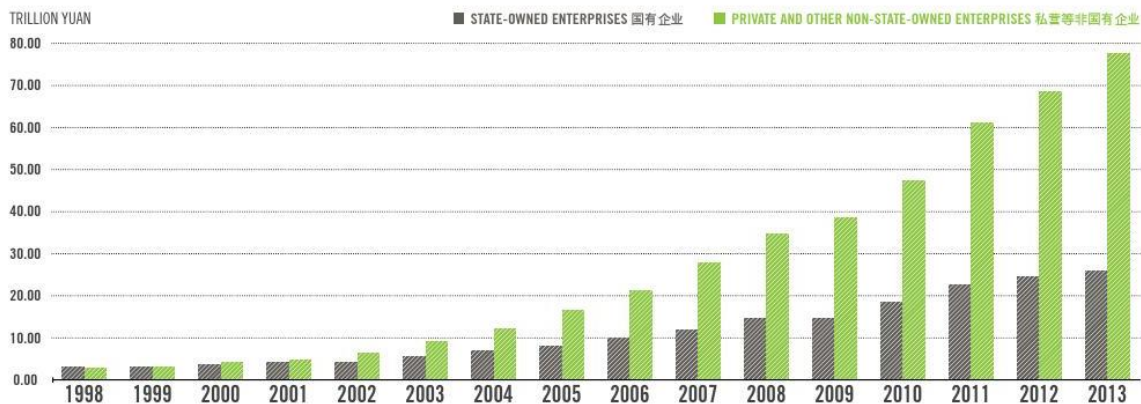
在2014年年中微信用户已经接近4.4亿。

为全球最大制造业国家。随着“中国制造”变得更加精密，中国企业拥有更多自主技术，中国的产品和消费者将决定全球的产品标准和消费者偏好。设想一下，假如在不久的将来，中国企业家能创造出价值50美元的智能手机或是低成本的太阳能电源，或是批量生产的电动汽车，这些产品必将很快火遍全球。

和经济规模巨大、市场环境巨变相伴的，还有中国经济极其复杂的一面。不仅是企业家们要面对规模庞大且快速成长的市场，而且不同地区的发展阶段也各不相同，甚至同一地区的发展也有所差异。此外，由于中国人购买力的快速提高，产品、技术、商业模式往往都会呈现出跳跃式发展。例如，在一些较落后地区，消费者原来在市场和便利店买东西，之后他们就直接开始使用智能手机在网上购物，两种方式之间并没有过渡阶段。来自中国国内、亚洲其他地区和世界各地的品牌涌入中国市场，使中国消费者眼花缭乱。有了这么多选择，他们成了也许是世界上最善变的消费者群体。不同的消费者行为研究一再表明，多数中国人缺乏品牌忠诚度，不管是对日用品还是奢侈品都是如此。例如，2014年，波士顿咨询公司对2400名司机做了一项调查，结果发现，3/4的消费者表示，在购买下一辆车时将会尝试其他品牌。

中国市场兼具庞大、复杂两个特点，这是其独特之处。不过我也相信，在某种程度上，它也在很多方面预示着未来世界商业环境的发展方向。之所以这样说，是考虑到技术的作用，尤其是互联网技术，它降低了行业间门槛，促进了跨部门竞争。为了生存，企业必须绞尽脑汁寻找新的竞争优势，即使这可能意味着要涉足自己并不熟悉的领域。而且，恰恰是因为中国经济相对不发达，所以相比于欧洲、北美和日本市场，中国的跨部门竞争反而更加具有流动性。例如，中国的电子商务已经颠覆了零售

FIGURE 2: REVENUES BY COMPANY TYPE, 1998-2013 图2：1998至2013年收入总额（按公司类型分布）



companies are constantly stretching from their established territories into new areas. Computer giant Lenovo and telecom equipment maker Huawei are both striving to become global smartphone players. Broad Group, a maker of industrial and commercial air-conditioning equipment, now also makes buildings using prefabricated units. BYD, which established itself as a maker of batteries for mobile phones, has now emerged as a viable automaker.

When companies struggle to hold on to any form of competitive advantage, sources of long-term profit become harder to find and retain. As Zhang Ruimin, CEO of Haier Group, likes to point out, companies can no longer think about establishing a defensible position for themselves and their products; instead, they can only think of creating the means to transform themselves over and over again.

Through the 1990s and 2000s, a lot of

Chinese companies set themselves the goal of catching up with multinationals, often benchmarking themselves against what they saw as Western "best practices." Today, having closed the gap, many have realised that they will need to figure out their own paths forward. This is leading to much experimentation, in particular in the area of business strategy, where China's complex, fast-changing, and often ambiguous business environment is making companies rethink how they plan for the future. Rather than setting goals or targets, companies are instead concentrating on ways of strengthening their capabilities to improvise and innovate in the face of immediate challenges and opportunities.

To be successful, entrepreneurs have to seize on the advantages of China's scale and dynamism to make their companies fast-growing, powerful, and flexible, and build around the idea of reinventing themselves repeatedly. Almost all of the Chinese entrepreneurs we'll meet in this book have an extraordinary openness to outside ideas and an increasing willingness to bring in resources from outside China, especially in the form of people with the right kinds of expertise.

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业的格局：即使购买者身处最偏远的地区，也能更方便地买到商品，比传统实体店的销售链更为快捷。同时，中国的电子商务巨头也正在进军金融领域，提供比银行利息收益更高的货币市场产品。通常，中国企业会从现有业务领域扩张到另一个新领域。比如，计算机巨头联想、电信设备制造商华为都力图在全球智能手机市场上立足。远大集团作为工业冷气、商用空调的生产商，也在使用预制模块来修建大楼。比亚迪从手机电池生产商起家，现在已经转型成为汽车制造商。

当企业将精力全部集中于维系现有竞争优势，其长期的利润来源的开发和稳定就会成为问题。正如张瑞敏所说，企业的出发点不应该是怎样防御性地维持现有优势，相反，它们必须不断积极进取、创新求变。

在20世纪90年代和21世纪初，许多中国企业将赶超跨国公司作为目标，它们往往以西方企业的最佳实践作为努力标杆。今天，随着与西方企业差距的缩小，许多中国企业家意识到，他们更需要找到属于自己的前进路线。为此，中国企业家进行了大量尝试，尤其是在商业战略方面。中国市场的变化迅速而复杂，商业规则也往往模糊不清，这种环境使得企业总是在反思未来的发展。在这种环境下，公司不再设定具体的目标，而是集中精力提升随机应变和开拓创新的能力，以应对往往不期而至的挑战和机遇。

企业家要想获得成功，就必须利用中国市场的巨大和巨变，将其转化为优势，从而将自己的企业打造成为快速成长、强大而不失灵活性、随时准备改变自己的市场参与者。本书涉及的企业家对外界思想的态度几乎都非常开放，并且日益重视对国外各种资源的引进，尤其是各个领域的急需人才。