



中国美国商会
The American Chamber of Commerce
People's Republic of China



China Business Climate Survey



AmCham-China

• Beijing 北京 • Tianjin 天津
• Central China 华中 • Dalian 大连

2011 BUSINESS CLIMATE SURVEY REPORT

中国美国商会 2011 年 商务环境调查报告

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CHAIRMAN'S MESSAGE

The 2011 *Business Climate Survey* is the 13th annual review and assessment of the prevailing business environment conducted by the American Chamber of Commerce in the People's Republic of China (AmCham-China). It is based upon direct input from chamber members doing business in Beijing and throughout China, including Dalian, Tianjin and Central China (Wuhan), where AmCham-China has established chapters. Based on years of existing data, the 2011 survey provides insights into historical trends and the most current experiences of American companies operating in China.

AmCham-China relies heavily on the annual data gathered from the *Business Climate Survey*. It signals to us where our members see progress, where they are struggling, and where they will allocate their company's resources. We use this data to inform our advocacy efforts and outreach. This year, the *Business Climate Survey* indicates that the US business community has ambitious goals to continue and expand operations in China, but the regulatory environment presents significant uncertainties and causes apprehension about how or if it will be clarified. AmCham-China members hope there will be greater transparency and consistency regarding the policies affecting their business.

Another clear message from the *Business Climate Survey* shows that our members no longer worry about the possibility of a double-dip recession. When asked about investment in their China operations, 83 percent of surveyed companies report they anticipate increasing their investment in China. US enterprises are less concerned about macroeconomic risk and more confident in pursuing opportunities in China.

AmCham-China notes the success of the recent Joint Commission on Commerce and Trade (JCCT) and President Hu Jintao's state visit to the US. It is evident both countries consider their bilateral relationship a top priority. The JCCT agreements included reforms to the protection of intellectual property rights (IPR), the clean energy market, indigenous innovation policies, and standards testing, among others. President Hu's visit resulted in a critical declaration de-linking government procurement from product catalogues based on indigenous innovation criteria. The *Business Climate Survey* was conducted before these meetings took place and so responses to the survey do not reflect reactions to those meetings. However, you will note that the results of the survey correlate well with the areas addressed in the JCCT and state visit discussions, reflecting the close coordination we have maintained with both governments on trade and commercial matters.

主席致辞

2011年《商务环境调查》是中国美国商会（AmCham-China）对主流商务环境的第十三次年度回顾和评估。本次调查数据来源于在京和全国开展业务的商会会员企业的直接反馈，其中包括大连、天津和中部地区（武汉）等商会设立办公室的地区的会员企业。2011年的调查将在以往数据的基础上，深度分析美国在华企业经营的历史趋势以及最新状况。

中国美国商会十分倚重每年从《商务环境调查》中获得的数据。该数据反映了商会的会员企业取得的进步、面临的困难以及未来公司资源的布局。我们根据这些数据决定自身工作的重点和拓展方向。今年的《商务环境调查》显示，美国商界对继续并扩大在中国的业务经营设立了雄心勃勃的目标，但鉴于目前中国的监管环境还存在相当的不确定性，也引发了对于监管环境是否会以及如何明朗化的担忧。中国美国商会成员企业希望那些影响美国在华商业运营的相关政策能够增加透明度和一致性。

本次商务环境调查传达的另一个清晰的信号是我们的会员企业不再担心中国经济出现二次探底的可能。当被问及在中国的投资运营状况时，83%的受访企业表示计划增加在华投资。美国的企业对中国宏观经济风险的担心减弱，对中国商机的信心增强。

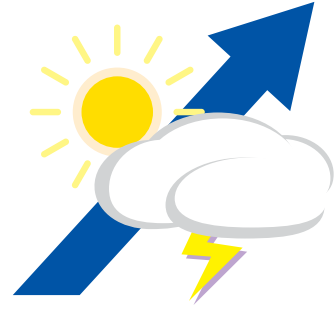
中国美国商会注意到近期两国成功召开了中美商贸联委会（JCCT）会议，胡锦涛主席成功地对美国进行了国事访问。显然中美两国都认为加强双边关系是头等大事。本次JCCT达成的协议中包括改革知识产权（IPR）保护、清洁能源市场、自主创新政策和标准测试等。胡主席访美期间中美双方发表了重要的联合声明，表示政府采购产品目录不与自主创新标准挂钩。本次商务环境调查开始于上述会议和访问之前，因此调查结果中没有体现会员企业对会议和访问的看法。但读者可以发现，本次调查的结果与JCCT会议和胡主席访美双方讨论的内容高度相关，充分说明了商会一直以来与两国政府在商贸领域保持着密切的协调关系。



Ted Dean 耿安华
AmCham-China Chairman
中国美国商会主席

SUMMARY

This year's *Business Climate Survey* shows that business performance has returned to pre-financial crisis levels in many sectors. But, importantly, the forecast is tempered with continued concerns over market access and industrial policies, among other issues. While the current environment is generally positive, the survey reveals concerns and warnings about the future.



AmCham-China members continue to be optimistic regarding China's economy today and into the near term across most sectors. When asked how 2010 revenues of their China operations compare to 2009 results, 42 percent said revenues increased slightly, and 43 percent said revenues increased substantially. In other words, 85 percent reported an increase in revenue this year. This reflects a rise of 29 percentage points from last year's survey response, a substantial improvement.

However, China's regulatory landscape continues to hamper current and future opportunities for American companies. This puts long-term growth and, in some sectors, continued market participation, into question for the first time since China began its market reforms more than 30 years ago. Survey respondents report increasing levels of unease with government policies and regulations. While concerns about economic instability diminished this year, **bureaucracy, unclear laws and regulations, and corruption** have all moved up the ladder of business challenges for US companies in China.

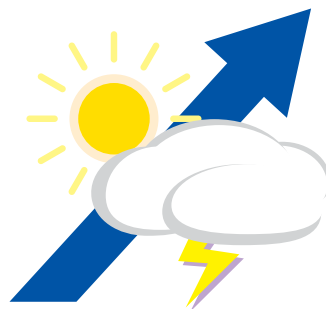
83%

of respondents report they will increase investment in China operations in 2011.

More AmCham-China members participated in the survey this year than last year (434 respondents), and results show that most companies are doing well in China and are achieving growth in revenues and profits. China is a key market for most of these member companies and investment remains strong. At the same time, survey results demonstrate that American businesses are facing a growing wave of barriers, rooted in discriminatory policies and inconsistent local practices, which have a negative impact on current business results and threaten to constrict growth and limit opportunities for the future.

摘要

今年的《商务环境调查》显示，许多行业的企业经营业绩已经恢复到金融危机之前的水平。但重要的一点是，对未来的预期仍然受到对市场准入和产业政策等问题担忧的影响。当前的环境整体呈现积极态势，但本次调查中依然显示了对未来情况的担忧和警示。



中国美国商会的会员企业继续对当前和近期中国经济以及大部分产业情况表示乐观。当问及与 2009 年相比，2010 年在华经营收入状况时，42% 的受访企业表示收入略有提高，43% 表示收入大幅提高，即受访者中表示今年收入增长的占 85%，与去年的调查结果相比有显著增加，增幅达 29 个百分点。

然而，中国的监管环境继续对美国公司当前和未来的业务发展机会形成了阻碍。这造成了自中国实施改革开放政策 30 多年来美国企业第一次对在华能否保持长期增长以及是否能继续参与部分行业的业务经营产生了怀疑。受访者对中国政府相关政策法规所持有的不安程度有所增强。今年美国企业对经济不稳定的担忧与去年相比有所减弱，而**官僚主义、法律法规不清晰**以及**腐败**则在美国企业在华运营的挑战阶梯上有所攀升。

83%

的受访者表示 2011 年将增加对中国业务的投资。

与去年相比，参与今年调查的商会会员企业有所增加（受访企业共 434 家），调查结果显示，大部分企业在中国的业务经营状况良好，实现了收入和利润的增长。大部分受访的会员企业认为中国是他们的重要市场，投资势头依然强劲。与此同时，调查也显示，美国在华企业经营面临的障碍也不断增加，主要源自歧视性政策以及各地执法缺乏一致性，这些因素对当前业务的发展已经产生了负面影响，同时也会限制未来增长和发展机会。

Economic and Company Performance 经济发展状况和公司业绩

Profitability returns to pre-financial crisis levels

企业盈利状况已经恢复至金融危机爆发之前的水平

percent of respondents report
increased revenue

85%的受访企业表示业务收入增长

▶▶▶ Surveyed companies' financial performance is at its highest level since we began asking this question in 2002, with 78 percent reporting profitability in the past year. When we compared how long a company had operations in China and its profitability, we found consistently that the longer a company is in China the more profitable it is. The most unprofitable members are new in the market and still in the start-up phase. Companies that have five years or more in China are better equipped to sustain profitable enterprises (see chart 1).

According to the data, 21 percent of respondents said their operating margins "improved substantially" this year, up from 10 percent last year. Another 42 percent said margins "improved slightly," up from 34 percent in the prior year (see chart 2).

Survey responses indicate that revenue from operations in 2010 was much higher than the past two years. Even more impressive, the number of respondents who said revenue "increased substantially" rose by 21 percentage points (see chart 3).

▶▶▶ 我们从2002年起开始在调查中设置有关企业财务状况的问题，今年的调查结果显示，受访企业的财务状况处于历史最好水平，78%的受访企业表示去年实现盈利。我们发现企业在华经营时间越长，盈利水平就越高。而刚进入中国且仍然处于起步阶段的会员企业往往最不赚钱。在华经营时间满五年以上的企业更具备持续盈利的能力(参见图1)。

数据显示，21%的受访者表明企业今年的利润率“显著增长”，高于去年10%的比例。另外回答利润率“略有增长”的比例从去年的34%增加至今年的42%(参见图2)。

调查结果显示，2010年在华运营收入与前两年相比有了大幅增加。值得特别注意的是，回答“显著增长”这一项的比例较去年提高了21个百分点(参见图3)。

- American companies responding to our survey are doing well in the China market. 受访美国企业在中国的业务经营状况良好。
- Companies see opportunity in most sectors and geographical regions. 他们认为中国的大部分产业和地区都蕴含着发展机会。



How would you characterize your company's financial performance in China in 2010?
企业 2010 年在华财务状况

- Very profitable
盈利丰厚
- Profitable
盈利
- Break even, small loss
持平或略有亏损
- Large loss
严重亏损

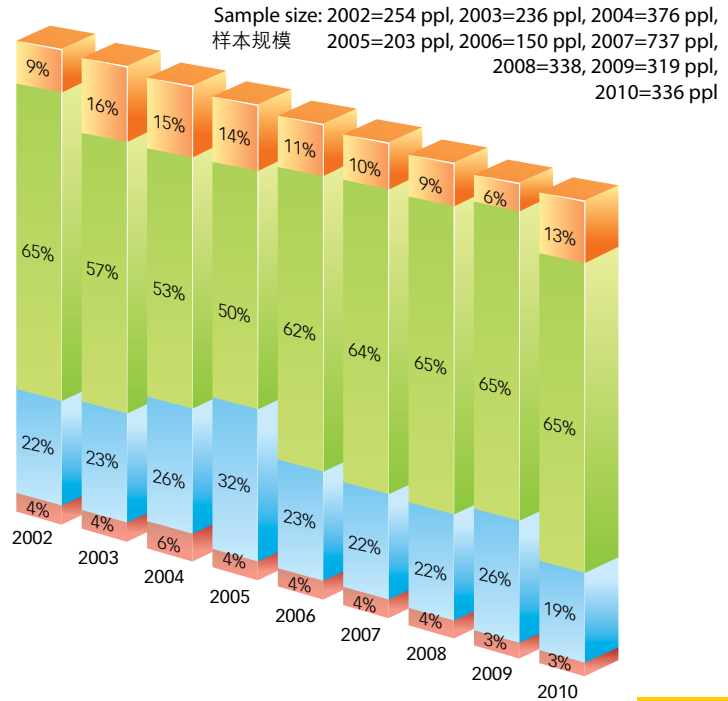


Chart (图) 1



How do the overall 2010 operating margins of your China operations compare to those of 2009?
2010 年企业在华利润率与 2009 年相比

Sample size: 2010=273 ppl, 2011=321 ppl
 样本规模

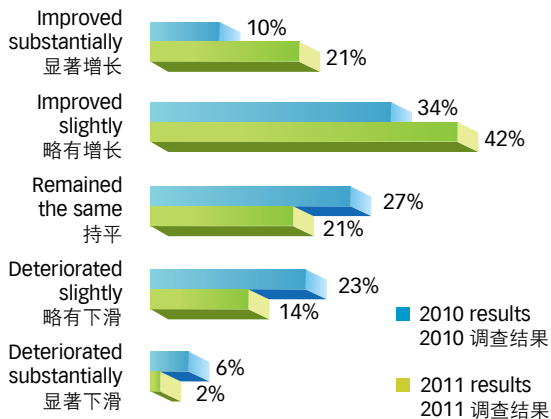


Chart (图) 2

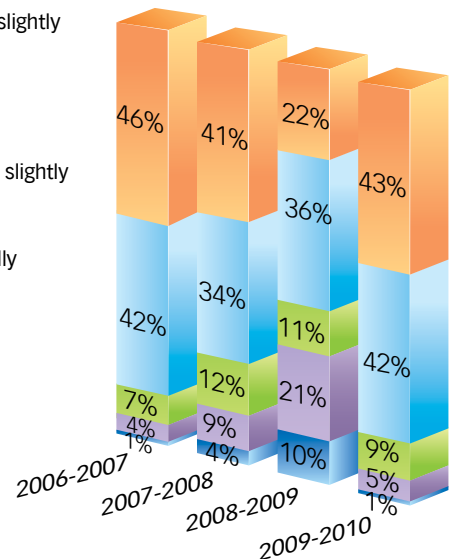
Chart (图) 3



How does the 2010 revenue of your China operations compare to 2009 results?
企业在华运营收入较 2009 年相比较

Sample size: 2007=126 ppl, 2008=658 ppl, 2009=282 ppl, 2010=280 ppl
 样本规模

- Increased substantially
显著增长
- Increased slightly
略有增长
- Remained the same
持平
- Decreased slightly
略有下滑
- Decreased substantially
显著下滑



Business Strategy

经营战略

83

Percent of survey respondents plan to expand operations in China.

83% 的受访企业表示计划扩大在华业务规模。

While concerns about economic stability have declined, apprehension about bureaucracy and the US-China relationship has increased as companies consider the risks to their China operations.

尽管对经济不稳定的担忧有所减弱，但对于官僚主义和中美关系可能对美国在华企业造成风险的担心又有所上升。

▶▶▶ Providing goods and services in China for the Chinese market remains the top priority for US companies in China. Contrary to the common notion that foreign companies come to China because of a cheap labor market and to export to the US and other markets, members consistently express a stronger interest in breaking into the Chinese consumer market and serving the Chinese customer (see chart 4).

China maintains its position as a top destination for global investment. Seventy-eight percent of companies surveyed rank China among their top three priority locations for investment. The number of companies who rank China as a "number-one priority" rose four percentage points from last year. Clearly, more and more US companies want to compete in the China market (see chart 5).

A striking 83 percent of companies have expansion plans this year, up four percentage points from last year. This year-on-year increase occurred only among respondents who said they plan to increase investments by at least 21 percent (see chart 6).

Again, the optimistic forecasts of our survey respondents for the next year illustrate higher levels of confidence than we have seen in recent years. In a year-on-year comparison, 57 percent of respondents forecast their revenues will increase by more than 11 percent. Given expectations for strong sales growth, it is not surprising that many survey respondents plan to significantly boost their investments in China. Based on this and the previous charts, US enterprises are willing to make much larger investments in China and they anticipate much greater returns on those investments here as well (see chart 7).

While member companies continue to rank a Chinese economic slowdown as the greatest risk to their China organization, macroeconomic worries are not as dominant as in previous years. US companies show growing concern about business challenges from bureaucracy and the deterioration of Sino-US relations. Compared to last year, the percentage of respondents who named bureaucracy and Sino-US political tensions as a serious risk increased by at least five percentage points. US companies are focusing on the big picture in China and considering what obstacles they will have to overcome to sustain their business in the future (see chart 8).

▶▶▶ 面向中国市场、为中国的消费者提供产品和服务继续成为美国在华企业的首要目标。与那些认为外国企业进入中国是为了利用中国廉价的劳动力市场，生产供出口美国和其他市场的一般观念正好相反，商会的会员企业一直对进入中国的消费市场、服务于中国的客户表示出更强烈的兴趣（参见图4）。

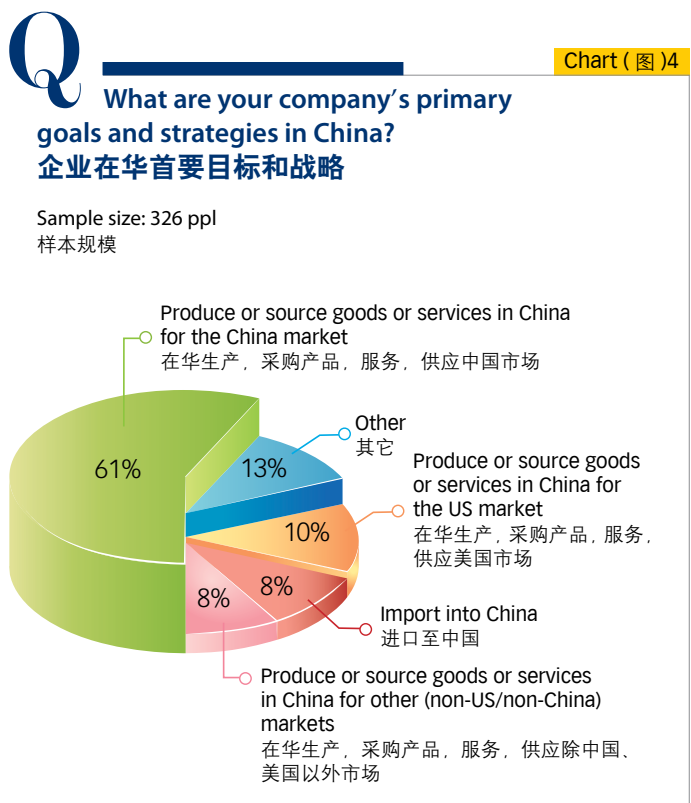
中国依然是全球投资的首选国。78%的受访企业将中国列为前三位投资意向地。且今年将中国选为“排名首位”的比例增长了4个百分点。显然，越来越多的美国企业希望参与到中国的市场中来（参见图5）。

高达83%的受访企业今年有增加投资的计划，与去年相比增长了四个百分点。所增加的这四个百分点来自于计划增加投资21%或以上的企业（参见图6）。

受访者对于来年收入的乐观预期又一次表明，美国企业对在华经营的信心处于近年来的较高水平。调查显示，57%的受访者预计其收入增长将达11%以上。基于对销售业绩大幅增长的预期，许多受访者表示将显著增加其在中国投资。从下图及前述相关图表中可以看出，美国企业愿意大规模扩大在华投资，并且预期该投资也将带来收益的大幅提高（参见图7）。

尽管会员企业依然将中国经济增速放缓视为在华经营面临的最大风险，但对中国经济状况的担忧与往年相比有所减轻。美国企业对官僚主义和中美关系恶化所造成的营商环境挑战担忧增强。与去年相比，视官僚主义和中美政治关系紧张为严重风险的应答比例增加至少五个百分点。美国公司在关注中国的宏观走向，并考虑今后维持他们业务的可持续性需要克服哪些障碍（参见图8）。

- Trend: Companies are increasingly in China to serve the China market.
趋势：企业越来越多地服务于中国市场。
- China continues to rank as a top market for international companies.
中国继续成为跨国公司的首要市场。
- Survey respondents see an economic slowdown as the greatest risk to their operations here, but are less concerned about this risk than last year.
受访企业认为经济放缓依然是他们在华经营面临的最大风险，但与去年相比，上述对经济放缓风险的担忧有所减弱。



Q How much do you estimate your company will increase investment in China operations for 2011?
企业对 2011 年在华投资增长的预期

Sample size: 281 ppl
样本规模

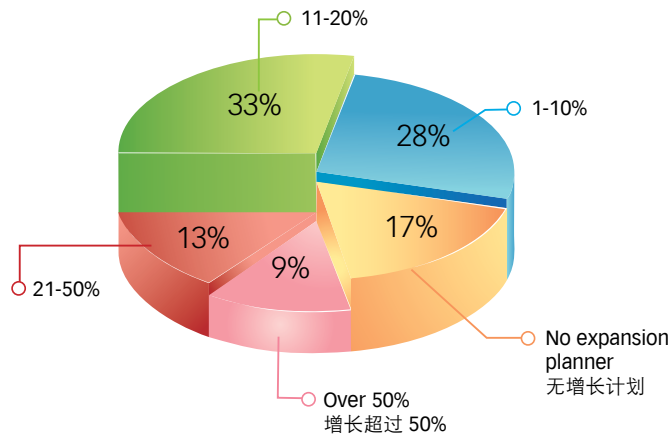


Chart (图) 6

Q What are your forecasts for 2011 China revenues compared to 2010?
企业 2011 年在华运营收入预期较 2010 年的对比

Sample size: 2008=381 ppl, 2009=274 ppl,
样本规模 2010=288 ppl, 2011=324 ppl

- Up over 50% (增长超过 50%)
- Up 21-50% (增长 21-50%)
- Up 11-20% (增长 11-20%)
- Up 1-10% (增长 1-10%)
- Remain the same (持平)
- Down 1-10% (下滑 1-10%)
- Down 11-20% (下滑 11-20%)

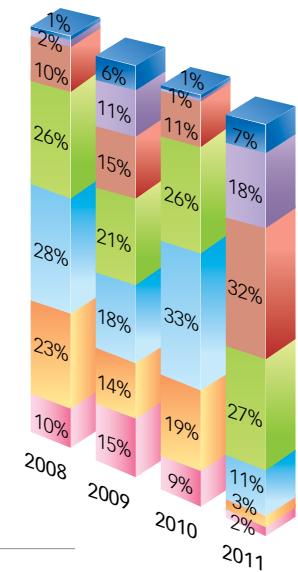


Chart (图) 7

Q What do you think are the greatest risks facing your China organization?
企业在华运营面临的主要风险

Sample size: 2007=168 ppl, 2008=309 ppl,
样本规模 2009=270 ppl, 2010=262 ppl,
2011=337 ppl

- Labor shortages (劳动力短缺)
- Increased bureaucracy (官僚主义加重)
- Deterioration of Sino-US relations (中美关系恶化)
- RMB appreciation (人民币升值)
- Chinese financial market instability (中国金融市场不稳定)
- Increased Chinese protectionism (中国保护主义增强)
- Labor costs (劳动力成本增加)
- Global economic slowdown (全球经济增长速度放缓)
- Chinese economic slowdown (中国经济增长速度放缓)

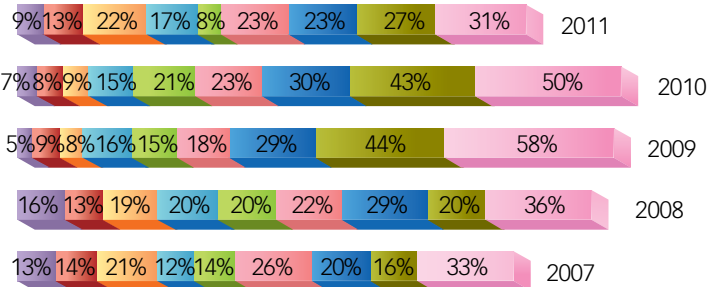


Chart (图) 8

Business Challenges

运营挑战

Transparency 透明度

▶▶▶ When respondents were asked to list their top five business challenges in China, bureaucracy ranked number one this year, up substantially from last year. In addition, compared to last year, an increasing number of respondents voiced concerns about unclear laws and regulations, inadequate IPR protection, and non-management human resources constraints. Each of these categories saw at least a five percentage point increase in the number of respondents who reported it as a top-five business challenge (see chart 9).

▶▶▶ 当受访者被问及并列出在华运营的五大挑战时，官僚主义今年位居第一，与去年相比排名大幅提升。此外，与去年相比，越来越多的受访者强调了对不明确的法律法规、不充分的知识产权保护以及非管理层人力资源匮乏的担忧。以上几类的选择率与去年相比提高了至少五个百分点(参见图9)。

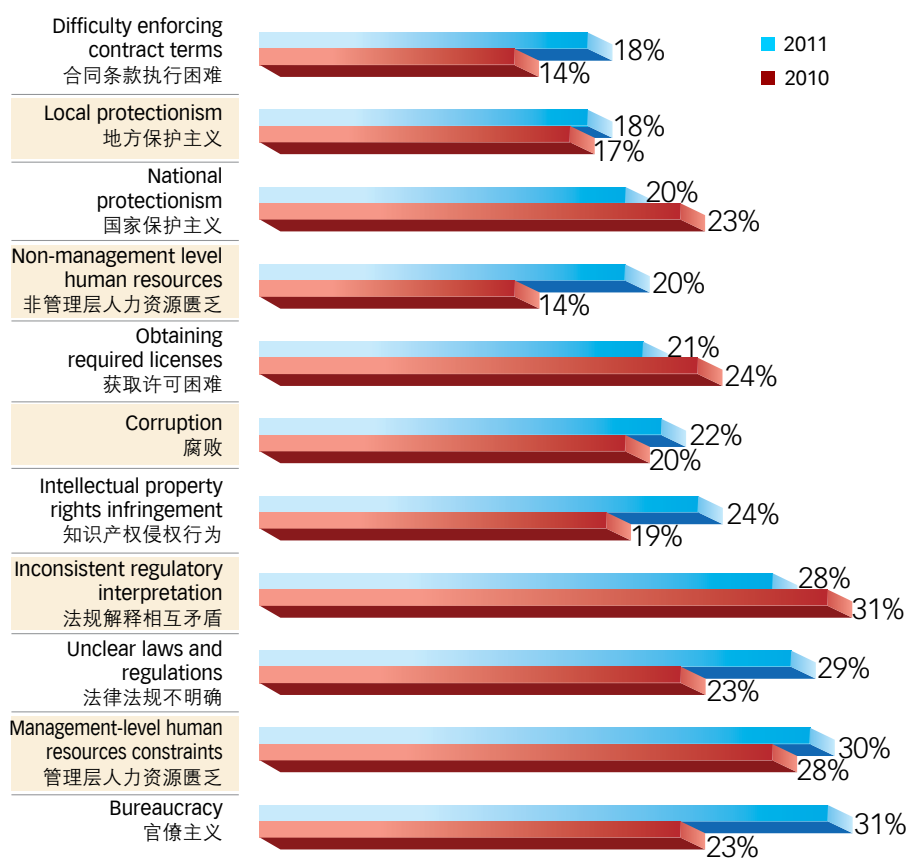
- Bureaucracy is a number-one concern for US business in China.
官僚主义成为美国企业在华经营的首要挑战。
- Corruption, unclear laws and regulations, and IPR protection have become bigger challenges this year.
腐败、法律法规不清晰和知识产权保护成为今年的重大挑战。

Chart (图) 9

Q

Issues reported as top-five business challenges 企业在华运营的五大挑战

Sample size: 2010=318 ppl, 2011=338 ppl
样本规模



National Treatment and Industrial Policy

国民待遇和产业政策

▶▶▶ In past years, economic reforms were rated as having a much greater, positive effect on US business in China. China made considerable strides in the early 2000s in opening its market and attempting to meet international demands. However, quite notably this year, when asked to what extent recent economic reforms had improved the climate for US business in China, the number of respondents who selected "not at all" increased by 15 percentage points. While this could reflect that reforms are no longer as essential as they were in the past, it could also demonstrate a sentiment that progress on economic reform has stalled. As US companies seek to make China a second home, they expect more of China and the development of its economic policies (see chart 10).

AmCham-China only started asking questions about indigenous innovation last year. The responses this year are similar to last year, with over a quarter of businesses reporting they have lost business as a result of indigenous innovation policies (see chart 11). Forty percent of those surveyed replied that they believe the effects of indigenous innovation policies *will* begin to negatively impact their business.

Respondents who said they anticipated losing business as a result of indigenous innovation were then asked how they would be affected by this policy. Survey respondents were most concerned about losing business in the state-owned enterprise (SOE) purchasing market. Sixty-two percent of respondents voiced worries about the impact of indigenous innovation policies on their sales into the SOE market, a rise of ten percentage points from last year. Other business segments received roughly the same response rates as last year; however, concerns over SOE purchasing have substantially increased (see chart 12).

Q To what extent have recent economic reforms improved the climate for US business in China?

中国近期经济改革对美国企业在华商务环境的改善程度

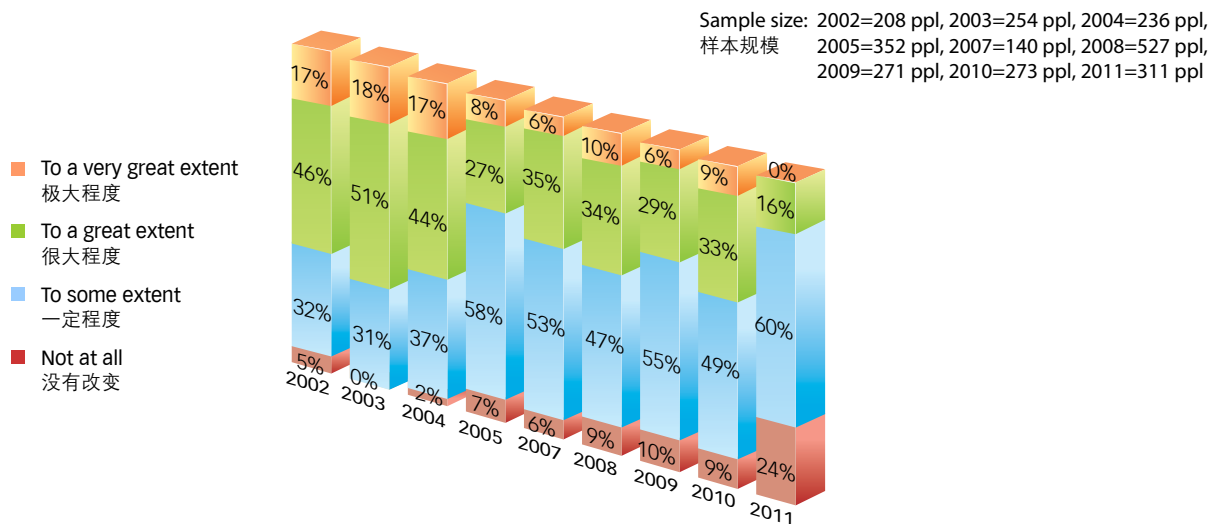


Chart (图) 10

**Q Do you feel that your company is losing out on business in China as a result of indigenous innovation?
企业在中国的业务是否受到自主创新政策的影响而处于不利地位?**

Sample size: 360 ppl
样本规模

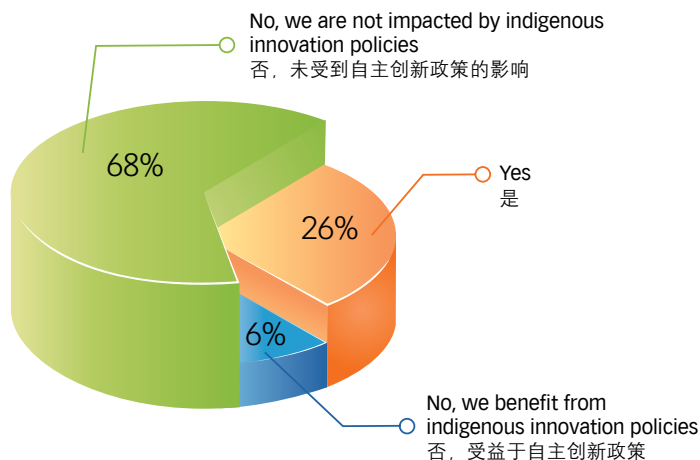


Chart (图)11

过去的几年中，经济改革被认为对美国企业在华经营具有极大的积极影响。中国在21世纪头几年在开放市场和满足国际需求方面改革力度很大。不过，特别是今年，当被问及中国近期的经济改革对美国企业在华商务环境的改善程度时，选择“没有改变”的比例比去年增加了15个百分点。这一方面显示出改革对于美国企业在华商务环境的改善不再像过去那样重要，但另一方面也折射出经济改革出现了停滞现象。鉴于美国企业正努力将中国变成自己的第二故乡，他们对中国的期望值提高并希望出台更多的利好经济政策(参见图10)。

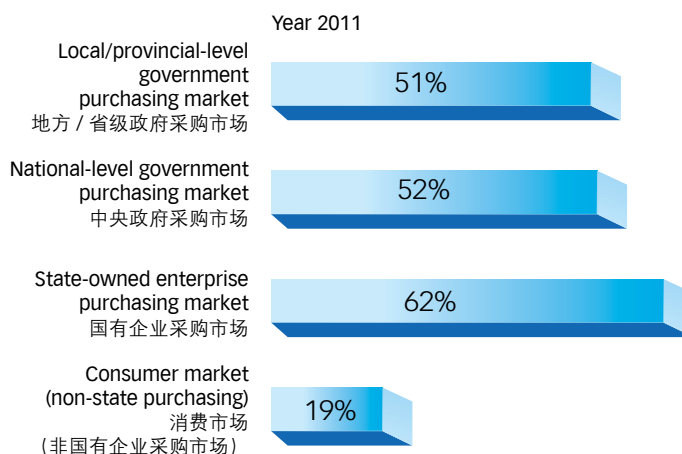
中国美国商会在去年的调查中首次涉及关于自主创新政策的问题。今年本题的回答情况与去年类似。超过25%的受访企业表示自主创新政策已经对其造成了业务损失(参见图11)，40%的受访者认为自主创新政策已经开始对他们的业务经营造成负面影响。

回答预计受自主创新政策影响将使其业务处于不利地位的受访者还被问及会在哪方面处于不利地位，受访者表示主要存在于国有企业(SOE)采购市场。62%的受访者对自主创新政策给其在国有企业采购市场带来的业务影响表示担忧，这一数据比去年大幅地上涨了10%。而其他选项的选择率与去年相比区别不大(参见图12)。

Chart (图)12

**Q Under China's indigenous innovation policy, in what segments of the market do you feel that your business is losing out, or will lose out?
中国自主创新政策对企业持续造成/未来造成的负面影响包括哪些方面?**

Sample size: 124 ppl
样本规模



Intellectual Property Rights

知识产权



▶▶▶ Eighty-seven percent of survey respondents reported that protection of intellectual property rights (IPR) protection is of some importance to their business, with 66 percent reporting it “very” or “critically” important (see chart 13).

Based on year-on-year data, survey respondents have not seen much progress in the protection of IPR protection in China. This survey was distributed between November and December 2010, right at the start of China’s six-month Special IPR Campaign. After the positive feedback received by the campaign, US business is hopeful that China will continue to strengthen enforcement. However, at the time of the survey, respondents expressed an equivalent amount of discontent with the protection of IPR as in previous years (see chart 14).

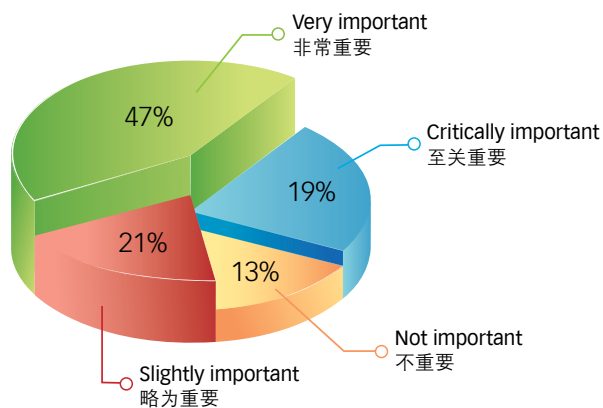
Those who reported that IPR is “slightly,” “very,” or “critically” important were asked about the extent of damage China-based IPR infringements cause for their companies. They responded that the damage mostly remains within China. However, global material damage is not insignificant. Given the strong interest US companies have shown in expanding their China operations, AmCham-China urges the Chinese government to respond by strengthening opportunities to sustain that goodwill, for example through greater protection of IPR (see chart 15).



How important is the protection of intellectual property rights to your business? 知识产权保护对企业发展的重要性

Chart (图) 13

Sample size: 331 ppl
样本规模



▶▶▶ 87% 的受访者认为知识产权保护对企业的业务经营具有重要性，其中回答“非常重要”或“至关重要”的高达66%(参见图13)。

对照去年的数据，受访者表示并未感觉到中国在知识产权保护方面的进步。本次调查问卷下发的时间是2010年的11月和12月，当时正值中国开展为期六个月的知识产权专项行动初期，该行动取得了积极的成果，美国商界希望中国能够继续加强知识产权执法。然而在本次调查阶段的结果显示，受访者在知识产权保护方面的不满意程度与往年相当(参见图14)。

回答知识产权“略为重要”、“非常重要”或“至关重要”的受访者还被问及源自中国的知识产权侵权行为对企业造成的损害程度。他们表示损害主要体现在中国境内。但是对全球运营造成的实质性损害也不可小觑。如上文数据显示，美国企业继续在华投资运营的势头强劲，中国美国商会敦促中国政府应继续加强知识产权保护工作，为扩大美国在华投资提供更多的机遇(参见图15)。



How would you rate China's enforcement of intellectual property rights (IPR)?
企业对中国政府保护知识产权执行力的评估

Sample size: 2002=219 ppl, 2004=210 ppl,
 样本规模 2005=331 ppl, 2008=389 ppl,
 2009=129 ppl, 2010=146 ppl,
 2011=251 ppl

- Totally ineffective 完全无效
- Ineffective 无效
- Effective or Very effective 有效或非常有效

Chart (图)14

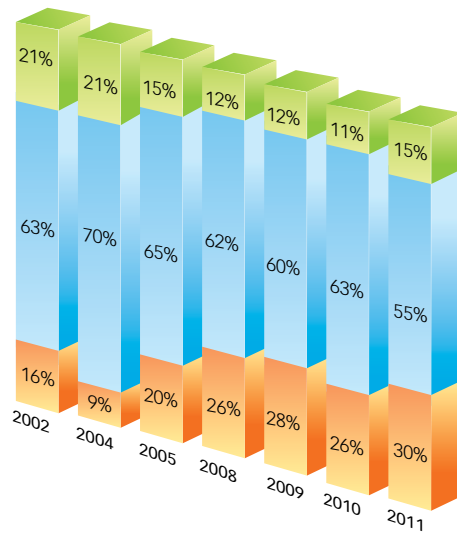
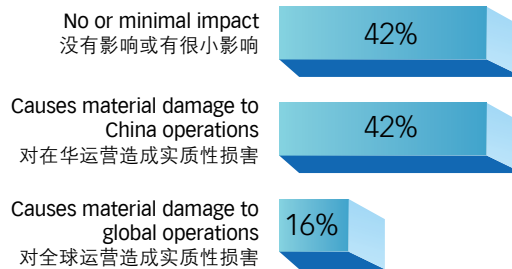


Chart (图)15

What is the extent of damage caused by China-originating IPR infringements of your company's products?
源于中国的知识产权侵权行为(对企业产品)造成的损害程度

Sample size: 130 ppl
 样本规模



Licensing and Market Access

许可和市场准入



71 percent of respondents believe the licensing process is not the same for foreign and Chinese companies.

71% 的受访者认为非中国企业和中国企业在获取许可方面受到差别对待。

▶▶▶ Questions regarding licensing were included for the first time this year, so there is no comparative data from prior years. However, obtaining licenses has ranked among the top business challenges for years in our annual *Business Climate Surveys*, and the data below reiterates that message. Sixty percent of our survey respondents say securing licenses is very or critically important to their business (see chart 16).

Those who reported that licenses were pertinent to their operations in China were then asked a series of follow-up questions, as shown below. Seventy-one percent of respondents stated that licenses are not equally granted to foreign and Chinese companies (see chart 17).

Despite efforts by the Chinese government to enhance market access, 49 percent of survey respondents say that there has still been no change in the licensing process and 35 percent report that licensing procedures have become more onerous than in previous years (see chart 18).

Based on the evidence below, a difficult licensing environment not only hinders foreign business opportunities, but also impedes expansion and investment in China. Given that 43 percent of respondents say licensing requirements put them at a competitive disadvantage, one can deduce that US companies feel they are losing business to local competitors who have an easier time obtaining licenses than they do (see chart 19).

Of survey respondents who indicated that licensing was important to their operations, 42 percent found business licenses the most difficult to obtain. Just below that, new product licenses and, further below, new local expansion ranked among those more difficult to attain (see chart 20).

Respondents reported increased competition from both foreign and Chinese firms. The perceived increase in competition from Chinese firms could be due in part to regulatory obstacles that give local firms a competitive advantage. The survey indicates that foreign companies are being forced to work harder than ever to keep pace in China (see chart 21).



35 percent find the awarding of licensing has become more onerous in recent years.

35% 的受访者认为近年来申请许可的程序愈加繁琐。



How important is the obtaining of licenses to your business (i.e. for the addition of new branches, retail outlets, products or lines of service)?

获得许可对于企业经营的重要性（如新增分支机构、设立零售网点、产品及服务许可）

Sample size: 348 ppl
样本规模

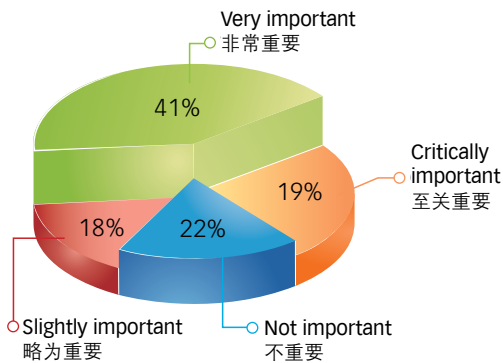


Chart (图) 16

▶▶▶ 今年的调查中首次增加了关于许可证的问题，因此无以往的数据可作比较。不过，根据我们每年的商务环境调查显示，获取许可困难一直是美国企业在华运营面临的几大挑战之一，以下数据再次证实了这一点。60%的受访者表示获取许可对他们的业务经营非常重要或至关重要(参见图16)。

回答获取许可与其在华经营相关的企业还被问及一系列的后续问题，详见下文。71%的受访者表示在中国许可授予并未做到对中外企业一视同仁(参见图17)。

尽管中国政府在放宽市场准入方面已经做了大量的工作，依然有49%的受访者认为许可程序并未发生变化，35%的受访者认为许可程序与以前相比更加繁琐(参见图18)。

基于以下数据，可以发现繁琐的许可程序不仅妨碍了外资企业的业务发展机会，同时也阻碍了外商在华业务扩张和投资的速度。从43%的较高选择率可以看出，美国企业感受到由于中国竞争者在获取许可上较为容易，致使他们在与中国竞争者竞争时处于劣势，逐渐丧失市场(参见图19)。



How are the relevant licenses in your industry applied?

企业所在行业相关许可申请情况

Sample size: 248 ppl
样本规模

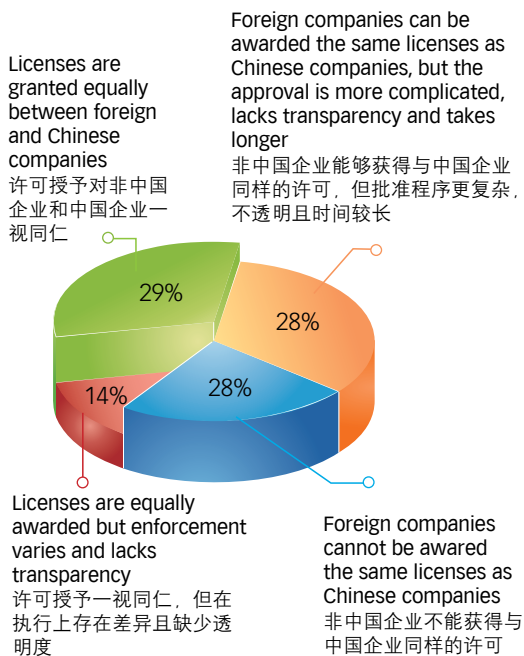


Chart (图) 17

在回答许可对业务经营重要的受访者中，有42%认为最难获得的许可是营业执照，第二难获取的是新产品许可，第三难的是新业务网点扩张许可(参见图20)。

受访者表示，与非中国企业和中国企业的竞争都在加剧。其中，与中国企业竞争加剧部分源自监管障碍，从中国企业获得一定竞争优势。调查显示，外资企业必须比以往更加努力，才能与中国的发展同步(参见图21)。

Chart (图) 18

Q How has the awarding of licenses changed in your industry in the past couple of years?
过去几年企业所在行业获得许可过程的变化情况

Sample size: 249 ppl
样本规模

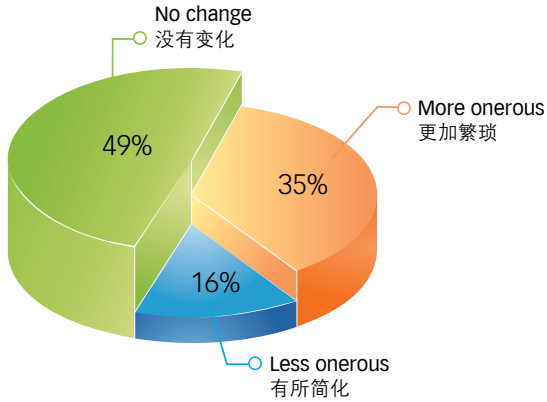


Chart (图) 19

Q How do licensing requirements impact your business?
许可要求对企业业务经营的影响

Sample size: 219 ppl
样本规模

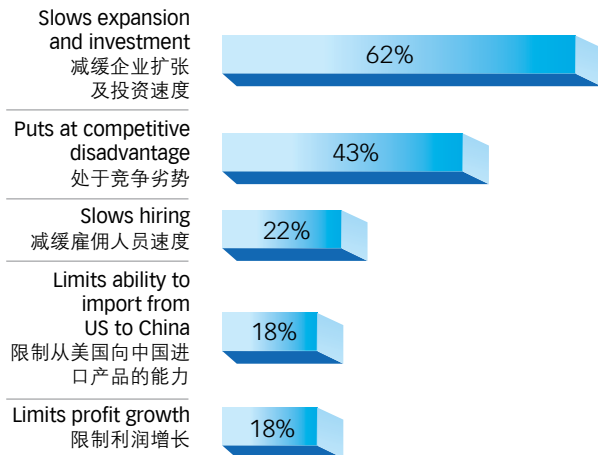
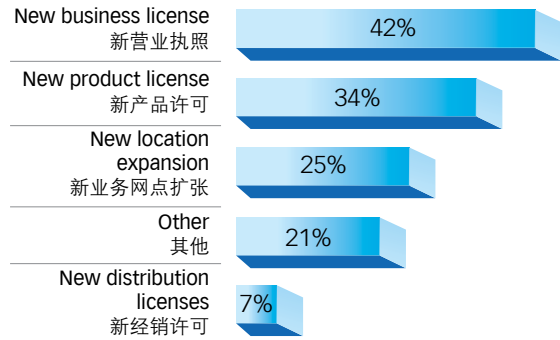


Chart (图) 20

Q Which licenses are difficult to obtain?
企业难以获得的许可种类

Sample size: 220 ppl
样本规模



Q How would you rate competition for your company's productions and services in China in 2010 vs. 2009?
与2009年相比，企业在华产品与服务在2010年所面临的竞争压力

Sample size: PRC firms/ 中国企业 =334 ppl, 样本规模
Foreign firms/ 非中国企业 =340 ppl, Imports/ 进口产品 =233 ppl

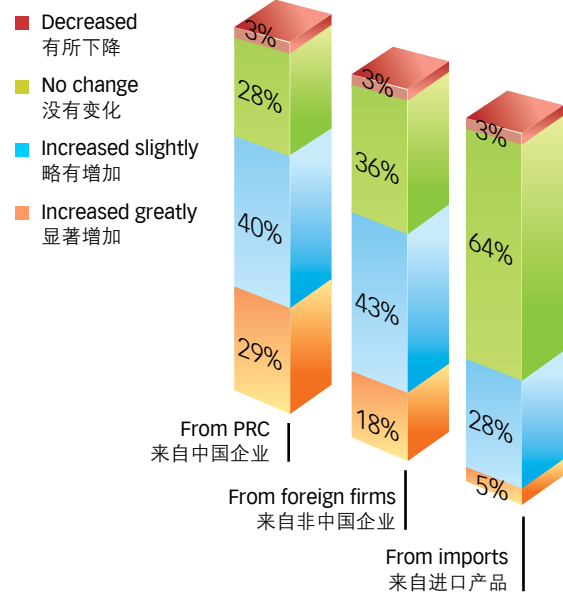


Chart (图) 21

Human Resources

人力资源

▶▶▶ Consistent with last year, increasing salary and wage expenses remain the number-one human resource issue for foreign business in China. This may reflect both the maturation of China's work force as workers accumulate more advanced technical and managerial skills and the effects of ongoing wage inflation (see chart 22).

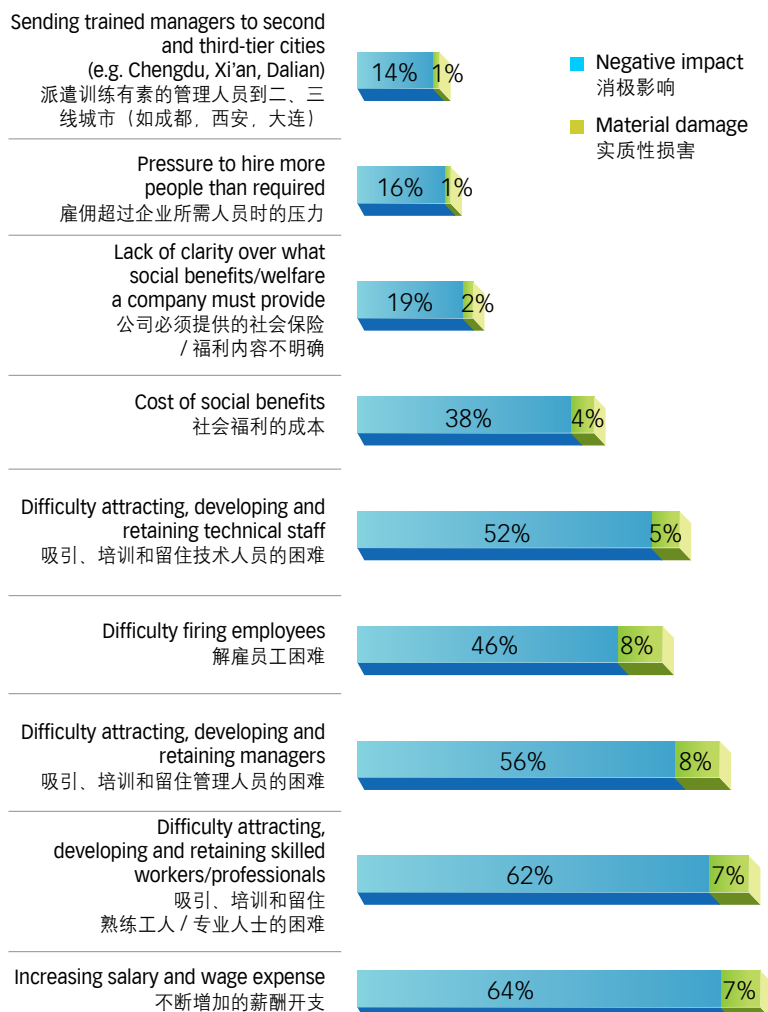
▶▶▶ 与去年的调查结果相同，不断增加的薪酬开支依然是外商在华经营在人力资源方面面临的首要问题。薪酬上涨一方面反映了劳动者掌握了更先进的技术及管理方法而日趋成熟，也反映了工资持续膨胀的影响（参见图 22）。

Q

Chart (图) 22

How do the following human resources issues affect your business operations in China? 相关人力资源问题对企业在华运营产生的影响

Sample size: 303 ppl
样本规模



Survey Profile

商务调查说明

434 respondents

68% Senior level, Country manager, 10% Director of other department, 8% Director of government relations or public relations department, 14% Other

36% Services, 23% Manufacturing, 18% Other (NGO, non profit), 11% High Tech, 9% IT, 3% Retail

63% Wholly foreign owned, 33% Representative office, 27% Joint Venture, 25% Regional/Branch office, 14% R&D center, 14% Regional headquarters, 7% Holding company, 4% Foreign invested company limited by shares, 2% Global headquarters, 2% Other.

434 个受访者

中国区总经理，高级管理人员占68%；部门总监占10%；政府关系或公共关系总监占8%；其他占14%

服务业占36%，制造业占23%，其他（非政府组织，非营利组织）占18%，高科技企业占11%，信息技术企业占9%，零售企业占3%

外商独资企业占63%；公司代表处占33%；中外合资企业占27%；区域办公室或分支机构占25%；研发中心占14%；区域总部占14%；控股公司占7%；外国投资股份有限公司占4%；全球总部占2%；其他占2%

Note: All charts represent data collected in the *2011 AmCham-China Business Climate Survey*.

注：本报告中所有图表数据来源于《中国美国商会 2011 年商务环境调查》



www.amchamchina.org/businessclimate2011



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