

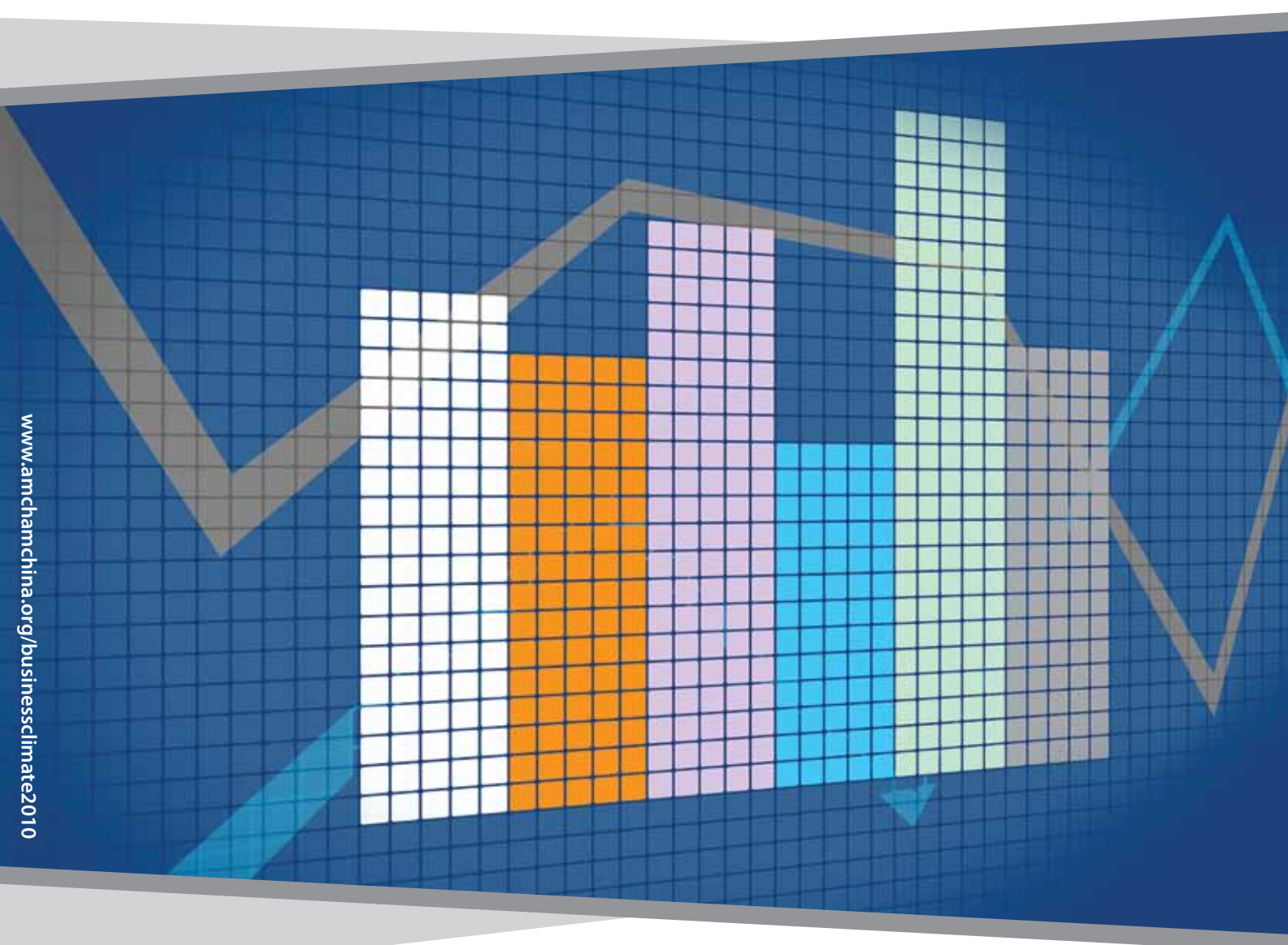
AmCham-China

中 国 美 国 商 会

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



2010 China Business Climate Survey



www.amchamchina.org/businessclimate2010

AmCham-China

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

2010 BUSINESS CLIMATE SURVEY REPORT

中国美国商会 2010 年 商务环境调查报告



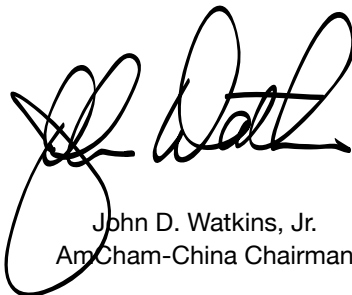
CHAIRMAN'S MESSAGE

The *Business Climate Survey* has been an important tool for AmCham-China since its creation 12 years ago. The survey traditionally played an integral role in AmCham-China's annual *White Paper on the State of American Business in China (White Paper)*. The data we collect helps gauge the environment for business in China and provides the statistical backbone for the analysis and recommendations given in the *White Paper*.

In 2009, during the height of the financial crisis, AmCham-China made the decision to release the *Business Climate Survey* results separately from the *White Paper* to provide standalone information that would quantify the shifting climate for business in China. This year, with both the American and Chinese economies showing signs of recovery, we are releasing the *Business Climate Survey* as its own document for the first time.

This year's findings show the complex challenges facing the US business community in China. While most American companies are doing well in China, they are concurrently troubled by a mounting number of policy challenges ranging from the inconsistent enforcement of laws, to China's discriminatory domestic innovation policies and regulations that limit market access into sectors that had been increasingly open to foreign investment for the past 30 years. These policies appear to be diminishing the ability of foreign companies to access the Chinese domestic market, right at the time China shifts from being an export-led economy to a more domestic-consumption-led economy.

AmCham-China members' concerns regarding this trend are reflected in this year's survey data. AmCham-China is taking proactive steps to engage with both the Chinese and US governments to address challenging areas. Going forward, we plan to continue calibrating our advocacy efforts to meet the issues facing our members. We will work constructively with all stakeholders to ensure that the doors for trade and investment in both China and the US stay open. In framing the concerns of our members, we hope that this year's *Business Climate Survey* provides policymakers in both the US and China insights regarding the environment facing American business people on the ground in China as they compete in China's dynamic marketplace.



John D. Watkins, Jr.
AmCham-China Chairman

主席致辞

中国美国商会商务环境调查始于十二年前，已成为商会重要参考工具。长期以来，该调查结果始终作为中国美国商会年度《美国企业在中国白皮书》的重要组成部分。调查数据有助于业界了解企业在华运营的商务环境，同时为《白皮书》中相关内容的分析和建议提供数据依据。

2009年，尤其是经历全球金融危机后，中国美国商会决定将商务环境调查结果提前于《白皮书》单独进行发布，以便向业界更为及时地提供中国商务环境变化的量化信息。今年是我们第一次单独发布商务环境调查。

本年度调查结果显示，美国在华企业依然面临着错综复杂的挑战。尽管大多数美国企业在华业务发展良好，但同时他们也面临着愈来愈多的政策及监管方面的挑战：执法缺乏一致性，倾向性的自主创新政策，以及由于一些法规的颁布，对过去三十年来对外资开放所实施的市场准入产生的影响等。现阶段中国正在经历从出口拉动型向内需驱动型经济的转变，而这些政策似乎影响了外资企业进入中国国内市场的力量。

本年度调查数据显示出中国美国商会会员企业对这一趋势的关注。商会将积极与中美两国政府共同应对这些挑战。着眼未来，我们希望就广大会员企业共同关注的问题，通过与相关各方开展建设性合作，以确保中美两国贸易和投资的持续发展。同时，我们也希望本年度的商务环境调查，能够让中美两国政策制定者更深入地了解美国企业在中国这一充满机遇的市场中发展的商务环境。



中国美国商会主席
华金声



INTRODUCTION

This year marks the 12th annual American Chamber of Commerce in China (AmCham-China) *Business Climate Survey*. The data represents a comprehensive view of the business climate among US companies in China. Companies participating in the survey come from throughout China, including Dalian, Tianjin and Central China (Wuhan), where AmCham-China has chapters. Relying on years of existing data, the 2010 survey provides insight into historical trends and the most current experiences of American companies operating in China.

Given the economic uncertainty that has overshadowed the global economy for the last 18 months, this year's survey is particularly important in its ability to depict the realities of the post-crisis business climate for American companies in China. Despite facing one of the toughest global economic environments in several generations, most American companies report continued profitability in China in 2009. However, the survey reveals that companies were not left unscathed, with 31 percent of businesses reporting a decrease in revenue between 2008 and 2009, far higher than in previous years.

In past years, AmCham-China members have expressed overwhelming optimism about their business outlook in China. The global economic slowdown tested that optimism with falling demand and diminished revenues in China and around the globe. Despite these challenges, however, this year's survey indicates that US companies remain optimistic about their China outlook in the medium term.

Yet adverse trends significantly temper the business outlook. Most apparent is worry that China's regulatory environment is becoming increasingly difficult for American companies. The *Business Climate Survey* results reveal that, for the first time ever, inconsistent regulatory interpretation became the most significant challenge facing American companies in China, surpassing human resources which had long been the top concern. The ascendance of this issue reflects concern about China's regulatory direction among US companies. Ensuring more consistent regulatory interpretation throughout the country will continue to be a challenge for the government.

Survey results also indicate growing concern over Chinese protectionism and market barriers like the inability of companies to obtain the licenses that they need to enter and compete in the Chinese marketplace. Nevertheless, AmCham-China is cautiously optimistic that China will continue to pursue the market-oriented reforms that have propelled the country's economic rise. We hope China will resist moves in the direction of market intervention.

Finally, protectionism remains a serious concern among member companies. At this critical moment of recovery, AmCham-China strongly urges both the Chinese and US governments to refrain from protectionist measures like tariffs, which hurt both Chinese and American companies and workers and detracts from the ability of both governments to work together to solve other pressing bilateral and multilateral issues.



综述

今年是中国美国商会 (AmCham-China) 开展《商务环境调查》(Business Climate Survey) 的第十二年。调查综述了美国在华企业对商务环境的观点。参与调查的企业遍及中国, 包括大连、天津和武汉等商会设有办公室的城市。2010 年的《商务环境调查》在历年调查结果的基础上进行了发展趋势性分析, 同时也阐述了最新美国在华企业的商务运营情况。

在过去十八个月, 全球经济一直笼罩在经济衰退的阴影之中, 本年度的调查对于分析危机过后美国在华企业所面临的实际运营的商务环境显得尤为重要。尽管面对几十年不遇的严峻的全球经济环境, 但 2009 年大多数美国企业在华业务继续保持盈利。不过调查结果同时也显示企业并非丝毫未受影响, 有 31% 的企业反映 2008 年至 2009 年的运营收入出现下滑, 这一比例远远高出过去的几年。

过去几年, 绝大多数中国美国商会会员企业对其在华整体业务发展前景抱有非常乐观的预期。而全球经济衰退使这种乐观预期面临着考验, 因为无论在中国还是全球市场, 企业均遭遇了需求下滑、收入减少的局面。但本年度的调查发现, 尽管面对这些困难, 美国企业仍然普遍看好其在华的中期发展前景。

但有一些不利的发展趋势也较大地影响了会员对业务的预期。最明显的是美国企业担心随着中国监管环境的发展, 其运营会变得越来越困难。《商务环境调查》结果显示, 法规解释缺乏一致性首次超过人才匮乏这一长期以来备受关注的的首要问题, 成为美国在华企业面临的最严峻挑战。这表明了美国企业对中国政策法规及监管环境发展方面的担忧, 同时, 在全国范围内确保法律法规解释的一致性可能也是中国政府所面临的挑战之一。

调查结果同时显示, 美国企业对中国的保护主义措施以及市场准入障碍 (例如企业无法获得必要的经营许可进入中国市场并展开公平竞争) 有着越来越多的疑虑。尽管如此, 中国美国商会仍然抱有审慎乐观的态度, 相信中国政府会沿着成功的市场化改革道路继续前行。

最后, 保护主义依然是中国美国商会会员企业所深切关注的问题。在经济复苏的关键时期, 中国美国商会敦请中美两国政府制止关税等保护主义措施, 因为这些措施不仅有益于中美两国企业和劳动者的利益, 同时也会对两国政府共同合作解决其他紧迫的双边和多边问题的能力产生影响。

2010 BUSINESS CLIMATE ANALYSIS

Background on the Survey Results

AmCham-China annually conducts its *Business Climate Survey* in order to understand the operating environment, the business outlook and the diverse challenges member companies face.

This year's survey was conducted in November and December 2009, allowing companies to report financial performance for the year accurately. The survey was sent digitally to all AmCham-China corporate members, comprised of both multinational companies and small and medium-sized enterprises. In total, 388 AmCham-China corporate members completed the survey, representing a 35 percent response rate. Of those that participated, 66 percent identified themselves as a senior-level country manager, and an additional 22 percent identified themselves as a department director or functional leader (see Chart 1). Respondents answered 88 questions, covering a range of topics including business outlook, financial performance, investment strategy, and operating and regulatory challenges.

In addition to the 2010 *Business Climate Survey*, AmCham-China also undertook a separate *Innovation Policy Survey* in February to address China's Indigenous Innovation policy, which has been of growing concern to US companies. The survey closed later that month with 203 respondents. AmCham-China presents the key findings from both the 2010 *Business Climate Survey* and the *Innovation Policy Survey* in this report. Charts 19 and 20 consist only of data drawn from the *Innovation Policy Survey*. All other data comes from the *Business Climate Survey*.

2010 年度商务环境分析

调查结果概述

中国美国商会每年进行《商务环境调查》，以了解会员企业所面临的经营环境、业务发展及各种挑战。

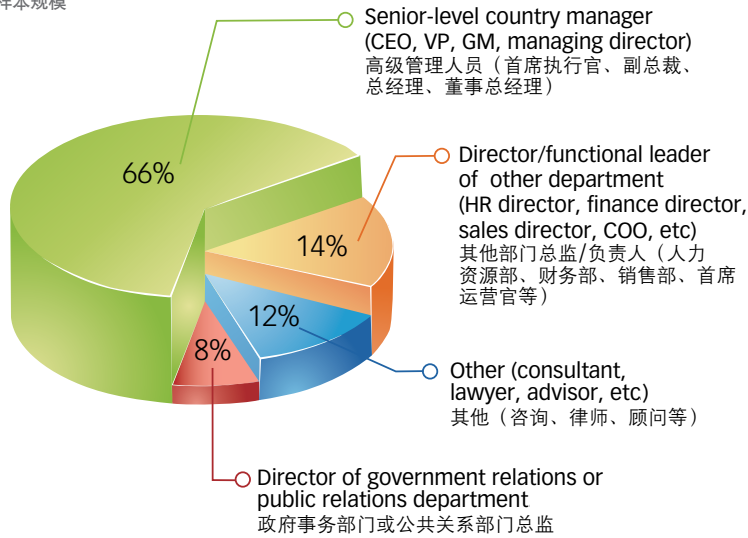
本年度的调查进行于 2009 年 11 月至 12 月，以便于能够准确反映企业 2009 年的财务状况。中国美国商会会员企业，包括跨国公司和中小企业都收到了电子调查问卷。共有 388 家会员企业完成了调查，反馈率为 35%。在反馈人员中，有 66% 为中国区高级管理人员，还有 22% 是部门主管或职能部门负责人（参见图 1）。参与调查反馈的企业共回答了 88 个问题，内容涵盖商业展望、财务业绩、投资战略以及经营和监管挑战等一系列主题。

除了《商务环境调查》之外，在二月份，中国美国商会还就美国企业日益关注的中国自主创新政策开展了《自主创新调查》(Innovation Policy Survey)。此次调查于二月底结束，共收到 203 份答卷。中国美国商会将 2010 年《商务环境调查》和 2010 年《自主创新调查》的主要调查结果均陈述于此报告中。图 19 和图 20 的数据取自《自主创新调查》。所有其他数据均取自《商务环境调查》。

Chart 1

Survey Respondent's Position in his/her Company
问卷反馈人员的职务

Company sample size = 388
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

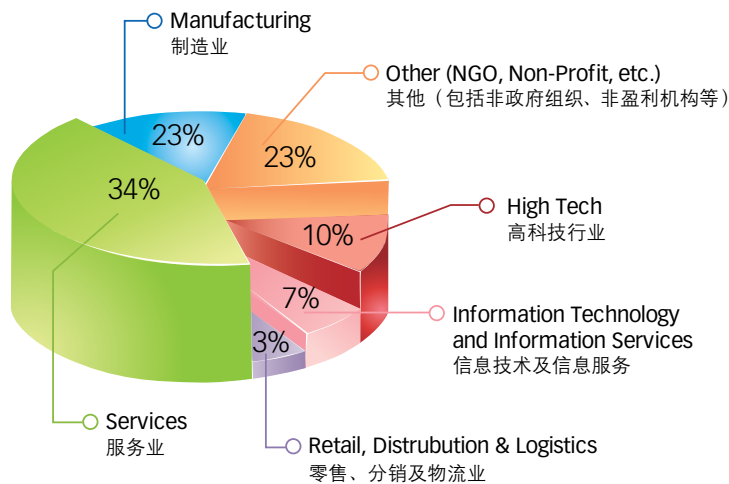
The vast majority of *Business Climate Survey* respondents are senior-level managers or leaders within their companies and organizations who are able to speak authoritatively on their financial situation and the operating challenges that they face.

《商务环境调查》的绝大多数反馈者都是各自公司及机构的高层管理人员或负责人，其对金融形势以及经营挑战的观点较有权威性。

Chart 2

Industry Representation among Survey Respondents
问卷反馈企业所涉及的行业

Company sample size = 388
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

American companies in the *Business Climate Survey* are highly diverse, representing many different sectors. They have come to China to pursue a wide-range of business opportunities in a variety of areas. In this year's survey, 34 percent of respondents identified themselves as companies broadly within the service sector, while 23 percent were manufacturers. The relatively equal distribution of industry sectors reflects the diversity of American companies with operations in China.

参与《商务环境调查》的美国企业高度多元化，代表众多不同的行业。他们来到中国在各个领域寻找更为广泛的商业机遇。本年度调查中，34%的受访企业来自服务领域，来自制造业为23%。相对均衡的行业分布反映了美国在华企业的多元化。

Wholly foreign-owned enterprises are still the most popular legal structure for American companies in China. Representative offices come in a close second with joint ventures remaining a strong option, particularly for companies in sectors where foreign market access is limited, like the automotive industry.

Another emerging trend that reflects the increasing size and complexity of foreign companies is the emergence of other types of legal forms such as regional headquarters, holding companies and research and development centers. AmCham-China expects greater variety as foreign companies look to optimize their China footprint and operations when pursuing new opportunities in China.

外商独资企业仍然是美国在华企业最为普遍的法律组织架构，紧随其后是代表处，而合资企业仍然是一种倾向性的选择，尤其是在汽车等对外资具有严格市场准入限制的行业。

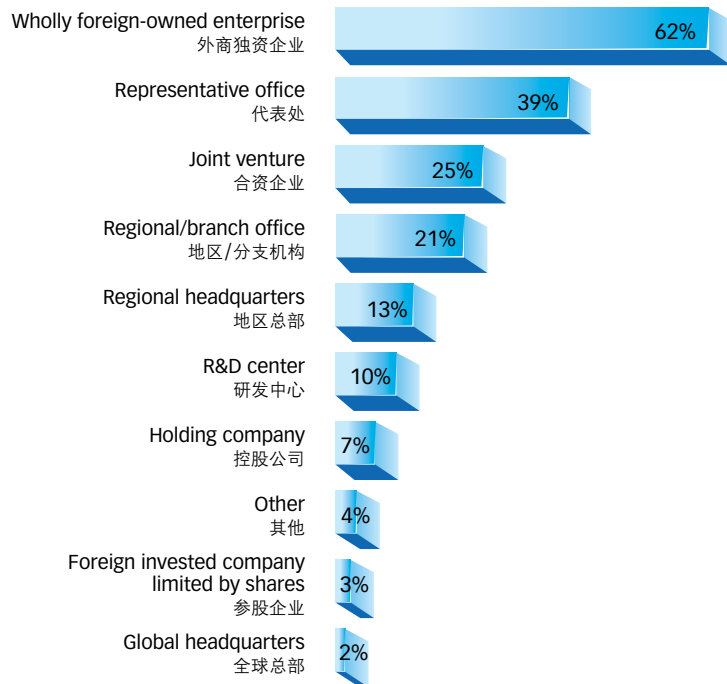
另外，地区总部、控股公司和研发中心等其他类型的法律形式的出现，也体现了外商规模逐步扩大，复杂性日益提高的趋势。中国美国商会预计，随着外资企业在中国寻找新的发展机遇和进一步扩大其在中国的市场，其多样性也将更多呈现。

Chart 3

Which of the following legal entities does your company have in China? (Respondents allowed to choose as many as apply)

企业在华经营的形式

Company sample size = 382
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源：2010年中国美国商会商务环境调查

Chart 4

How would you describe your company's business outlook in China compared to last year?

2008-2010年间企业较前一年对其在华投资前景预期的变化

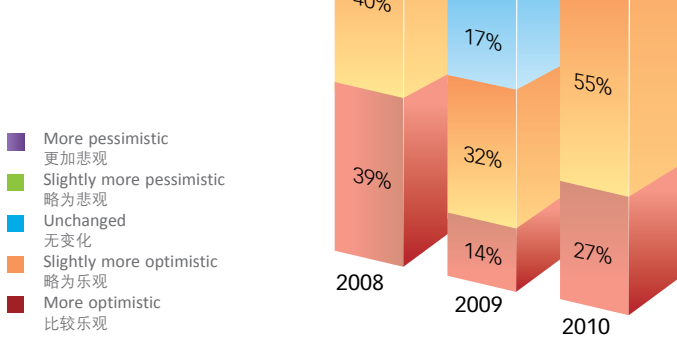
Company sample size:

公司样本规模

2008: 620

2009: 267

2010: 272



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

The overall business outlook suffered in the midst of the global financial crisis in 2009. Responses this year reveal a rebound in confidence by American businesses in China. But while optimism has returned to 2008 levels, more companies report a "slightly" optimistic outlook in 2010 as opposed to "more optimistic" in 2008, indicating some lingering concerns remain.

2009年全球金融危机也影响了企业对整体商务环境的预望。本年度调查结果显示,美国在华企业的信心有所恢复,乐观情绪重返2008年的水平,然而同时,尽管2010年调查中持“略微乐观”态度的企业较多,但持“比较乐观”的比例则远低于2008年。表明企业仍然存在一些担忧。

Chart 5

How would you describe your five-year business outlook in China? (2002 data unavailable)

企业自2000-2010年中对未来五年在华发展的展望

Company sample size:

公司样本规模

2000: 160

2001: 173

2003: 254

2004: 236

2005: 397

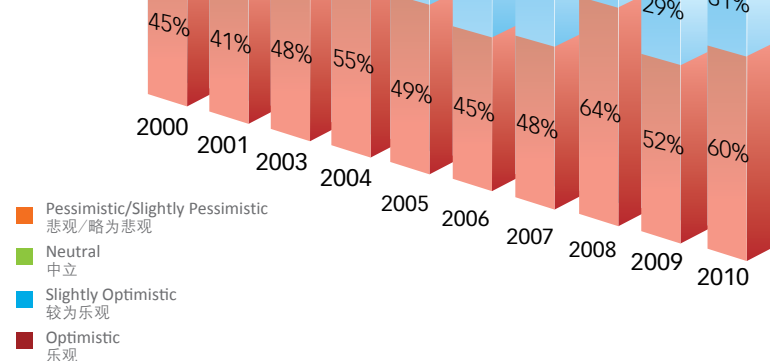
2006: 213

2007: 154

2008: 618

2009: 270

2010: 274



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

Five-year optimism among US companies in China rebounded after a significant drop in the 2009 survey, with 91 percent of companies reporting that their outlook is "slightly optimistic" or "optimistic." This increase in optimism reflects the perception that China has emerged from the downturn in a solid position and that China's medium-term outlook is quite strong. Companies responding "optimistic" reached its second highest level ever after 2008.

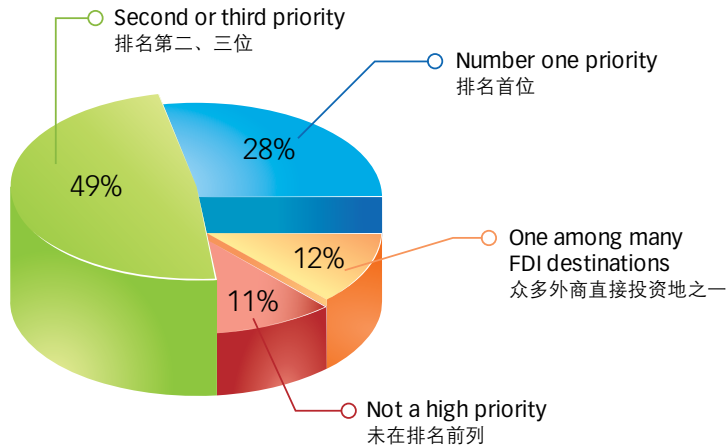
美国在华企业的五年期乐观度指标在2009年调查中出现大幅下跌后,今年有所回升,有91%的企业称对未来五年的发展前景持“略微乐观”或“乐观”态度。乐观情绪的上升表明企业认为中国已经稳步从衰退中走出来,且非常看好中国的中期发展前景。表示“乐观”的企业达到2008年以来的第二个新高。

Chart 6

How does China rank in your company's near-term global investment plans?

中国市场在企业近期全球投资计划中的排名

Company sample size = 238
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

As in recent years, more than 75 percent of companies responded that China remains a top-three priority in their company's global investment plans for 2010. This year's survey saw a significant year-on-year increase in the percentage of companies that reported China as their company's number one priority for global investment (from 22 to 28 percent).

和近年来的调查结果一样, 超过 75% 的企业表示 2010 年中国仍然是其全球投资计划的前三大首选目的地之一。本年度调查结果显示, 将中国作为其全球投资首选国家的比例较上年显著上升, 从 22% 增长至 28%。

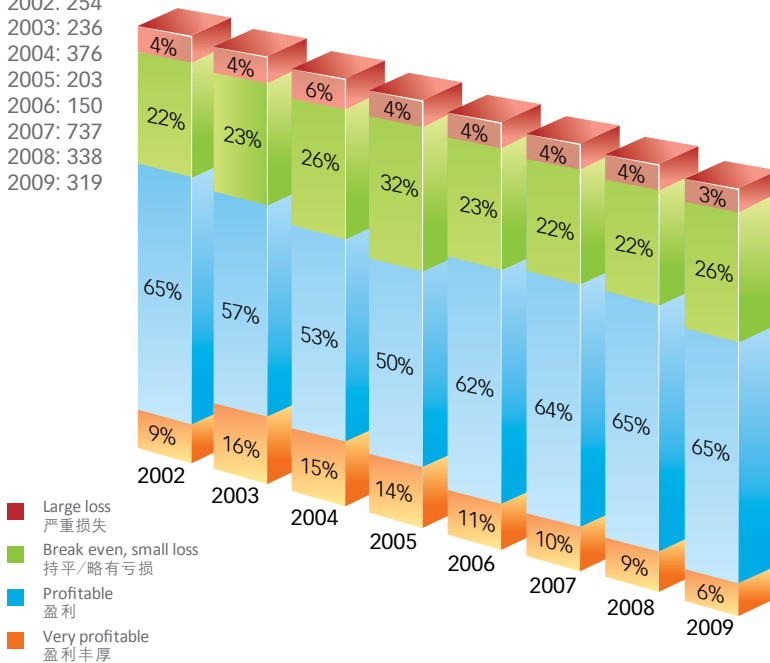
Chart 7

Profitability of China Operations (calendar years 2002-2009)

企业2002年至2009年在华盈利情况

Company sample size:
公司样本规模

2002: 254
2003: 236
2004: 376
2005: 203
2006: 150
2007: 737
2008: 338
2009: 319



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

Despite the economic downturn, profitability has remained relatively constant over the last four years. The trend for companies reporting themselves to be "very profitable," however, has seen a slow but steady downward shift from its high of 16 percent in 2003 to six percent in the most recent results.

尽管遭遇经济衰退, 但在过去四年间企业盈利状况仍然相对稳健。但“盈利丰厚”的企业比例呈缓慢、稳步下降趋势, 从2003年的16%下滑至最近的6%。

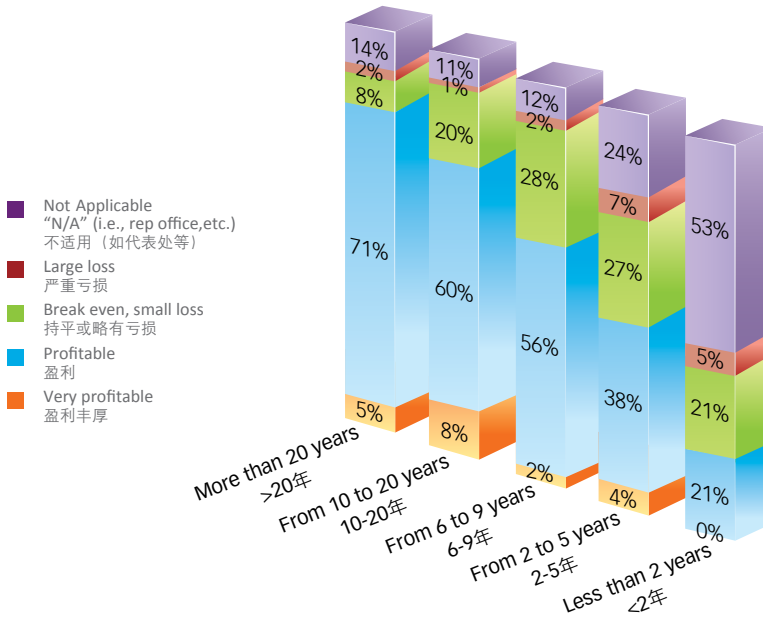
Chart 8

Profitability by Length of Time in China

企业盈利情况随其在华时间长短的变化

Company sample size = 388

公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

As in years past, survey data illustrates that there is a strong positive correlation between levels of profitability and a company's length of time operating in China. This reflects both that unprofitable companies tend to leave the market, and also the increased profitability of US companies as they become increasingly familiar with the Chinese market and regulatory environment.

和往年一样, 调查结果显示一家企业在华经营时间越长, 盈利能力也就越强。这反映了两方面的情况: 一是无法盈利的企业更趋向于撤出中国市场, 二是美国企业盈利能力的提高, 得益于他们对中国市场和监管环境的日渐熟悉。

Chart 9

Change in Revenue of China Operations Compared to Previous Year (2006-2009)

企业在华运营收入较前一年的比较 (2006-2009年)

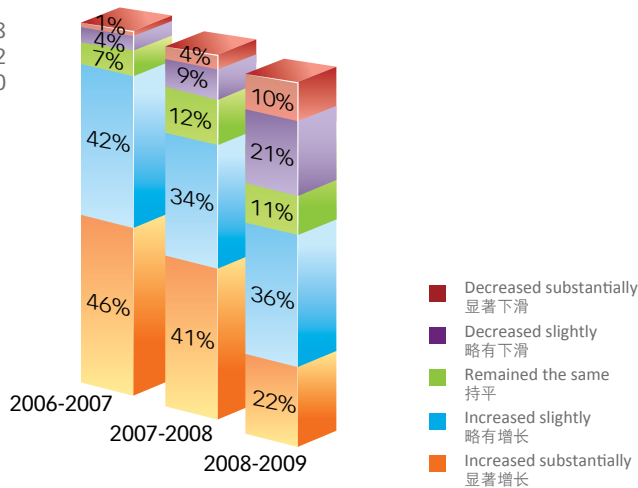
Company sample size:

公司样本规模

2006-2007: 658

2007-2008: 282

2008-2009: 280



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

The 2010 survey continued a three-year trend of fewer respondents reporting increasing revenue. While global revenues began to rebound midway through 2009, the large increase in companies reporting decreases in revenue (31 percent reporting “substantial” or “slight” decreases compared with 13 the prior) shows that overall there was a slowing in the percentage of companies seeing significant revenue gains in China. The 31 percent of American companies in China that report decreased revenue, however, is far below the 58 percent that saw revenue increase.

在反馈的企业中，其运营收入增长的企业数量连续第三年出现下降。虽然自2009年中期开始全球营业收入水平逐步回升，但在反馈中表示运营收入减少的企业比例却大幅上升（31%的企业称营业收入“显著”或“略有”减少，而上一年仅为13%），这表明，在中国实现业务增收的企业比例总体而言有所下降。不过尽管有31%的美国在华企业称营收下降，但这一比例仍远低于58%表示营收有所增长的企业比例。

Chart 10

Operating Margins of China Operations Compared to Worldwide Operating Margins Year-on-Year

企业在华利润率与其全球利润率的同比比较

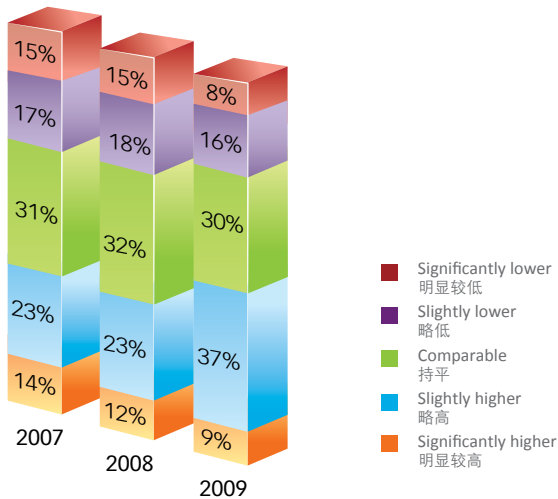
Company sample size:

公司样本规模

2007: 576

2008: 239

2009: 240



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

China operating margins for American companies increased significantly when compared to their worldwide operating margins in 2009. Nearly half of respondents (46 percent) reported comparatively higher China margins in 2009 than they saw worldwide, an increase from 35 percent in 2008. This likely reflects the relative strength of the Chinese market compared to others around the world in 2009.

2009年美国企业在中国市场的运营利润率明显高于其全球运营利润率。近半数(46%)的反馈企业表示,2009年其在中国市场的运营利润率相对高于其全球运营利润率,这一比例高于2008年的35%。这或许反映出2009年与世界其他地区相比中国市场的相对坚挺。

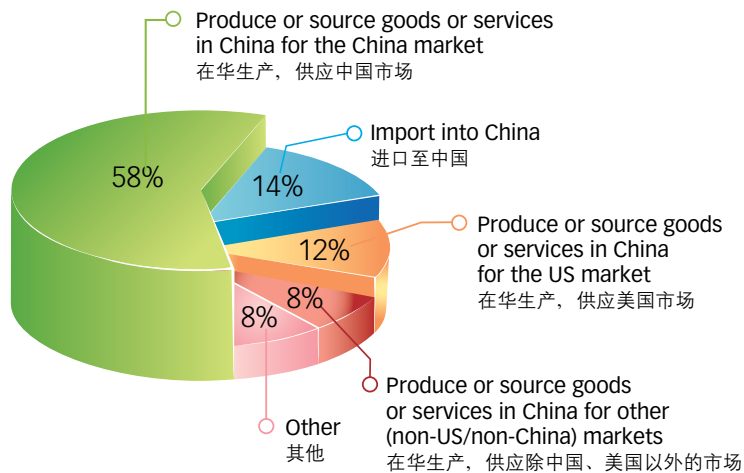
Chart 11

Top Goals and Strategies in China

企业在华首要目标和战略

Company sample size = 264

公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

Consistent with past years, the majority of American companies are primarily in China to pursue the Chinese marketplace. Only 12 percent of companies reported sourcing goods and services to the US as their top objective, less than the 14 percent that reported that their number one goal was importing into the Chinese marketplace. The results contradict the popular notion in the US that American companies primarily go to China to outsource products.

和往年一样,大多数美国企业进入中国市场是为了寻求在中国的发展机遇。仅有12%的企业将为美国采购商品和服务列为其首要目的,略低于表示企业首要目标是向中国市场出口商品与服务比例(14%)。这一调查结果显然与所谓的主流观点有较大的出入,即美国企业进入中国的主要目的是为了将其产品制造外包给中国。

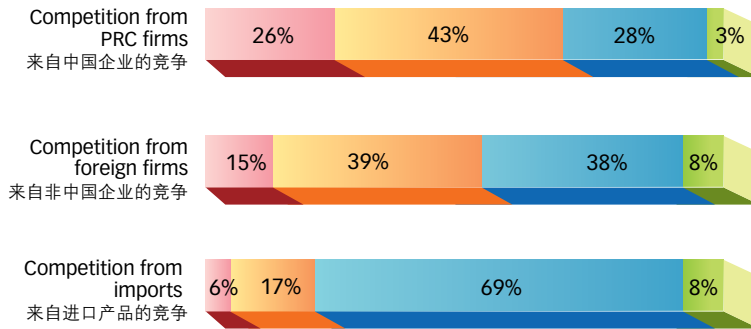
Chart 12

How would you rate competition for your company's products and services in China in 2009 versus 2008?

相比2008年，企业2009年对影响其在华产品及服务竞争力的评估

Company sample size: 278
公司样本规模

■ Increased greatly 显著增强
■ Increased slightly 略有增强
■ No Change 没有变化
■ Decreased 有所下降



Source: 2010 AmCham-China Business Climate Survey
资料来源：2010年中国美国商会商务环境调查

This year's survey data illustrates a clear rise in competition from PRC firms for American firms in China. Meanwhile, competition from foreign firms increased to a lesser extent and competition from imports remained largely static.

本年度的调查结果显示，中国本土企业与美国在华企业的竞争明显增强。同时，来自其他国家的外资企业的竞争也略有上升，而来自进口产品方面的竞争基本上保持不变。

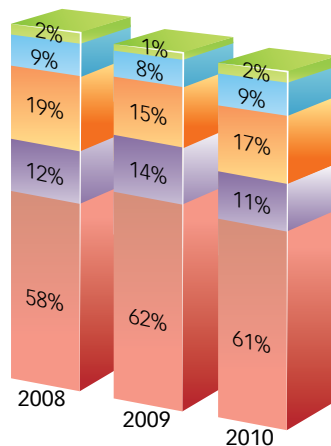
Chart 13

This year, beyond the 1st-tier cities Beijing/Shanghai/Guangzhou, does your business plan to expand to 2nd- and 3rd-tier cities (e.g., Dalian and Chengdu)?

除北京、上海、广州等一线城市外，企业今年是否有拓展到二、三线城市的计划（如大连和成都）

Company sample size = 253
公司样本规模

■ Plan to open offices in over 10 new cities in 2010
计划今年在超过10个城市设立办公室
■ Plan to establish regional network in several provinces in 2010
计划今年在个别省份建立区域性网络
■ Likely to set up sales or manufacturing operations to one or two new cities in 2010
计划今年在一至两个新城市增设销售网点或生产厂
■ Feasibility studies, but unlikely investment in new cities in 2010
有可行性分析报告，但今年此类投资可能性不大
■ No plans
无计划



Source: 2010 AmCham-China Business Climate Survey
资料来源：2010年中国美国商会商务环境调查

Trends for planned expansion into 2nd and 3rd-tier cities remained relatively constant in 2010. While the global financial crisis has forced many companies to focus their efforts and consolidate their business operations, 28 percent of companies foresee establishing operations in two or more cities in 2010.

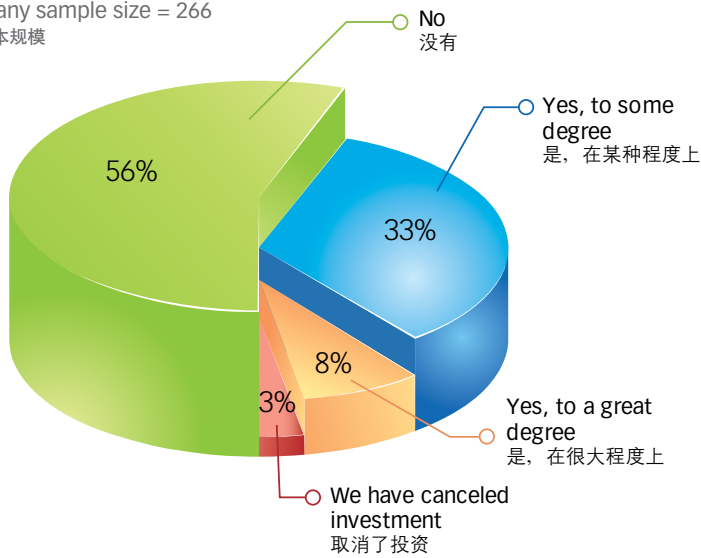
2010年计划将业务拓展至二三线城市的企业比例相对保持稳定。虽然全球金融危机迫使许多企业专注于现有业务的稳定发展方面，但仍有28%的企业预计将在2010年拓展业务至两个或两个以上城市。

Chart 14

In the last 12 months, has your company postponed any planned investment into China?

过去一年中企业是否暂缓对中国的投资计划

Company sample size = 266
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

Reflecting the fallout from the financial crisis, 44 percent of respondents indicated that they postponed or canceled investment in China in 2009.

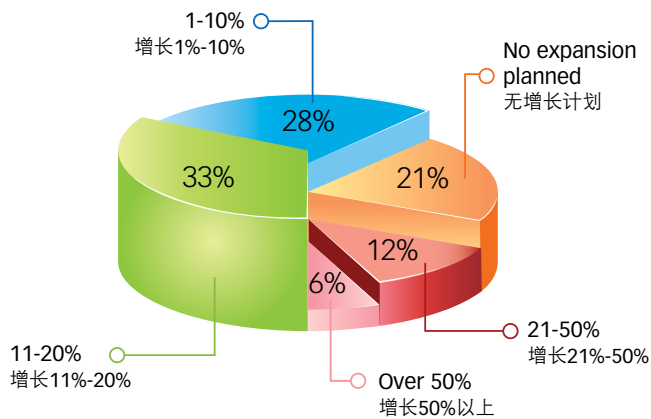
受金融危机的影响, 44%的企业表示 2009 年曾推迟或取消了在华投资。

Chart 15

Estimated Increase in Investment in China Operations for 2010

企业对2010年在华投资增长的预期

Company sample size = 232
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

While many companies put investments and expansion on hold in 2009, almost 80 percent of American businesses in China plan to increase their investment in 2010.

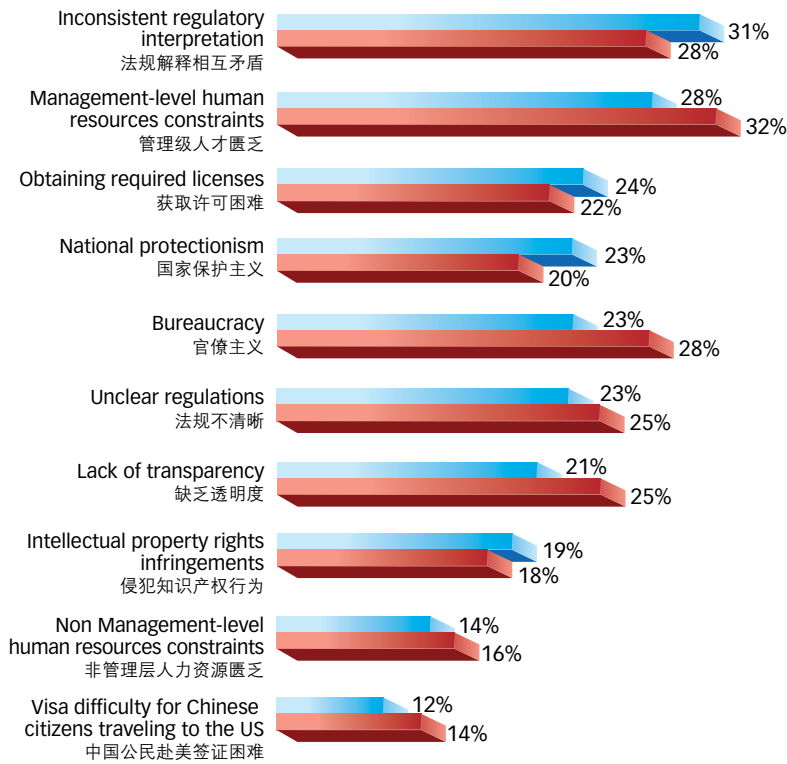
虽然许多企业在 2009 年暂停了投资与扩展计划, 但近 80% 的美国在华企业计划将在 2010 年增加其投资。

Chart 16

Issues Reported as a Top-Five Business Challenge

企业在华运营的五大挑战

Company sample size: 311 (2009) 318 (2010)
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

China's regulatory environment became the most problematic business challenge this year. This represents the first time that companies have ranked "inconsistent regulatory interpretation" as their top challenge, replacing "management-level human resource constraints," which held the number one spot since 2008. Concerns over obtaining required licenses and national protectionism became increasingly problematic, and bureaucracy and unclear regulations remain top challenges to American businesses as well. Seven of the top eight challenges in China relate to obstacles from the Chinese government.

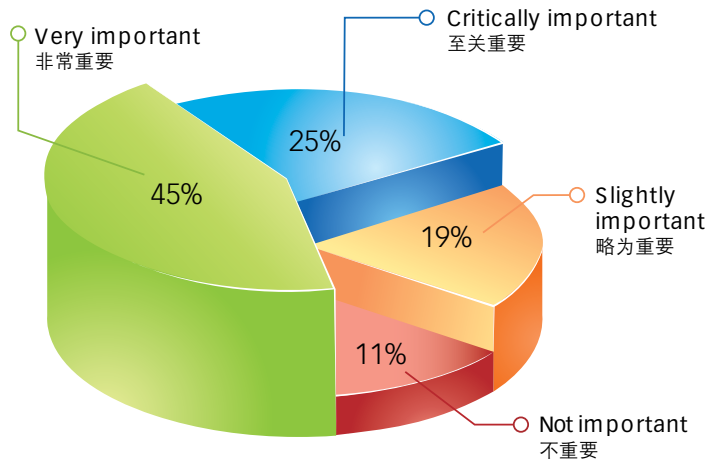
中国的监管环境成为本年度最严峻的业务挑战。这是企业首次将“法规解释相互矛盾”列为其首要挑战，取代了“管理级人才匮乏”问题，而这一问题自2008年以来一直居列为首要问题。企业对于获得必要的经营许可和国家保护主义方面的担忧也日益加剧，而官僚主义和法规不清晰也是在华美国企业面临的主要挑战。企业在华面临的八大挑战中有七项与中国政府相关。

Chart 17

How important is the protection of intellectual property rights to your business?

知识产权对企业发展的重要性

Company sample size: 277
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

Nearly 90 percent of American companies indicated that intellectual property rights are important to their business, and 70 percent of those companies reported that intellectual property rights are “very” or “critically” important.

近 90% 的美国在华企业表示知识产权对其业务有着重要意义，其中有 70% 称知识产权“非常”或“至关”重要。

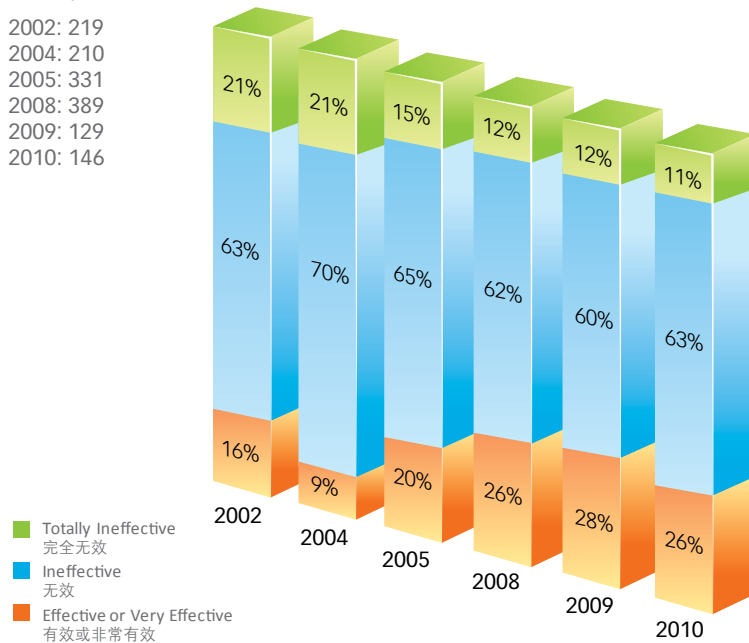
Chart 18

How would you rate China's enforcement of intellectual property rights? (2003, 2006, 2007 data unavailable)

企业对中国政府保护知识产权执行力的评估

Company sample size:
公司样本规模

2002: 219
2004: 210
2005: 331
2008: 389
2009: 129
2010: 146



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

Although China's enforcement of intellectual property rights has improved over the last 10 years, progress has stagnated recently and 74 percent of US companies report that enforcement is “totally ineffective” or “ineffective.”

尽管在过去十年间，中国的知识产权执法有所改进，但近来似踟躇不前，有 74% 的美国企业表示知识产权执法“完全无效”或“无效”。

Chart 19

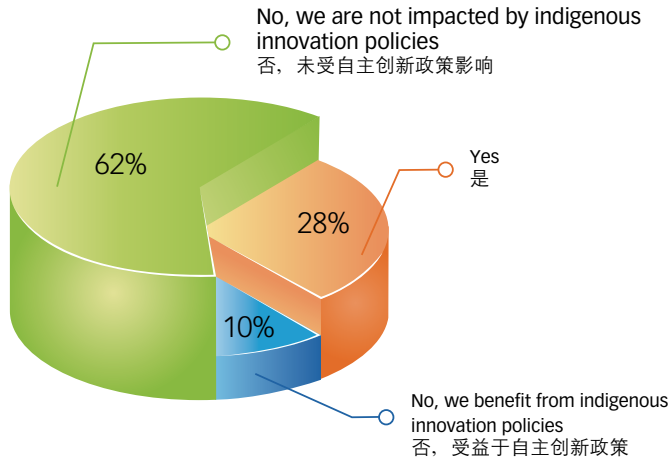
From *Innovation Policy Survey*. See page v for explanation.
此图引自《自主创新调查》，详见第v页

Do you feel that your company is losing out on business in China as a result of indigenous innovation policies?

企业在中国的业务是否受自主创新政策的影响而处于不利地位?

Company sample size = 203

公司样本规模



Source: AmCham-China Innovation Policy Survey
资料来源：中国美国商会《自主创新调查》

One area that has drawn great concern from American companies is China's Indigenous Innovation Policy, China's recent efforts to foster domestic innovation through government procurement incentives. Companies are concerned that the policies used to foster such innovation are being implemented in a way that discriminates against foreign companies. Although the current policy only targets select industries and has not yet been implemented, 28 percent of American companies responded that they are already losing out on business as a result.

中国的自主创新政策，即中国近来通过政府采购激励措施促进自主创新的行为，已经引起了美国在华企业的关注。企业担心中国执行促进自主创新的政策在某种程度上意味着歧视外资企业。尽管目前的政策仅针对某些行业且尚未实施，但已有28%的反馈企业表示他们已因此而遭受业务损失。

Chart 20

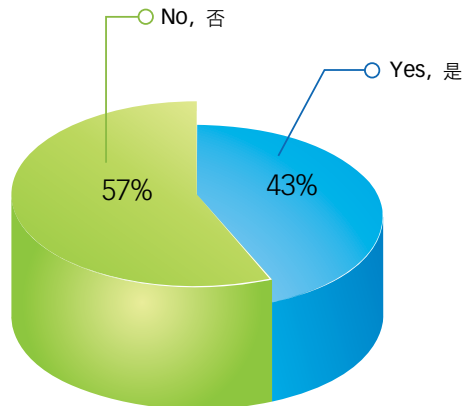
From *Innovation Policy Survey*. See page v for explanation.
此图引自《自主创新调查》，详见第v页

Do you believe that the effects of China's indigenous innovation policy will begin to negatively impact your company/increasingly impact your company in the future?

中国自主创新政策是否将对企业的未来造成/持续造成负面影响?

Company sample size = 203

公司样本规模



Source: AmCham-China Innovation Policy Survey
资料来源：中国美国商会《自主创新调查》

Over 40 percent of companies responded that they expect to be negatively affected by these policies once they are fully implemented. For American high-tech companies, whose industries have been targeted by these policies, 57 percent reported that they expected to lose business.

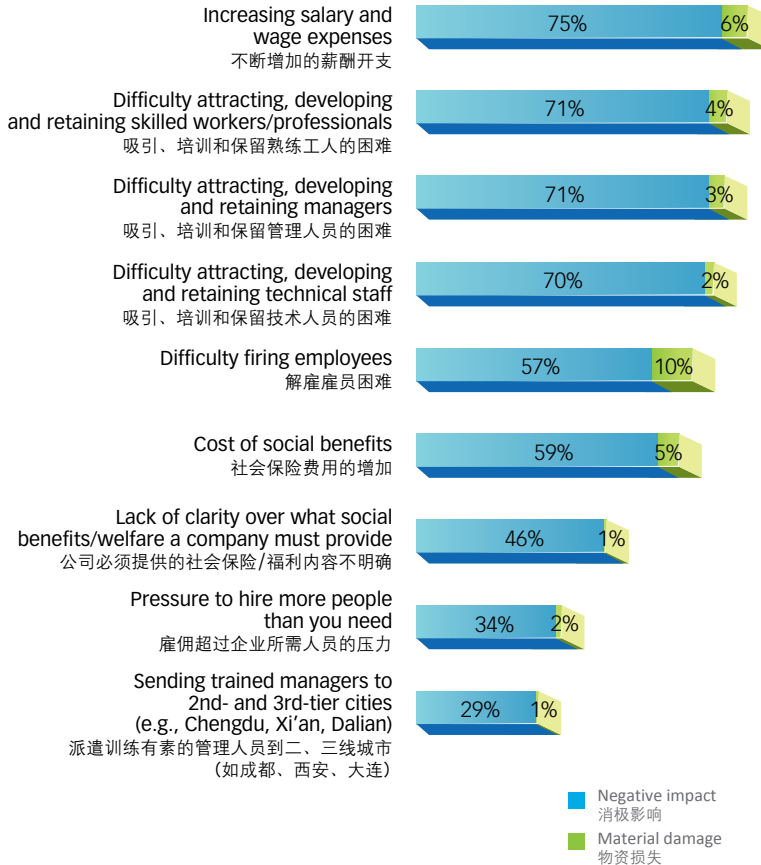
有超过40%的企业反馈，一旦这些政策全面实施，他们预期将受到不利影响。对于这些政策所涉及的美商高科技企业而言，有57%的企业称他们预计会因这些政策而丧失业务。

Chart 21

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

Company sample size = 254
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源: 2010年中国美国商会商务环境调查

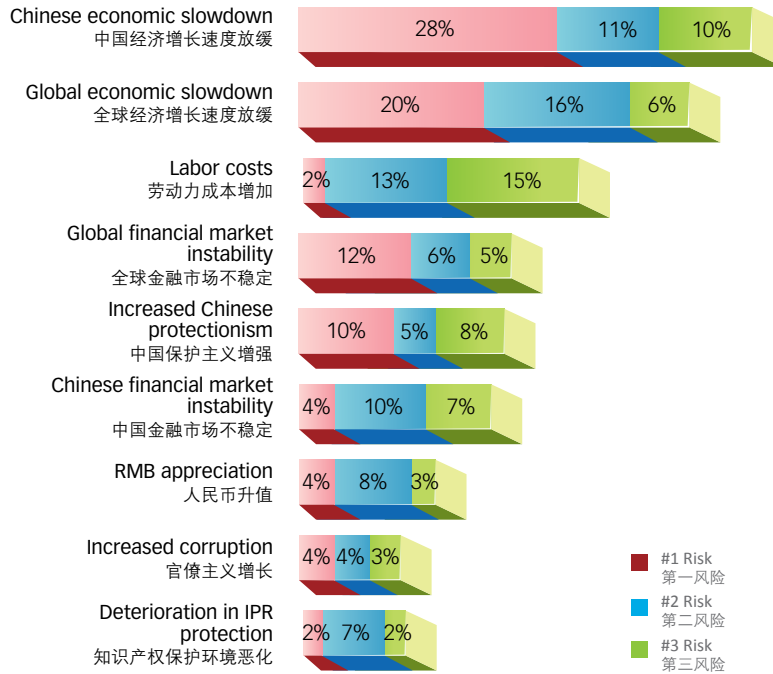
Increasing labor costs and employing skilled workers and managers remained the most important human resource issues for American companies in China in 2009. Difficulty firing ineffective workers, primarily as a result of the Labor Contract Law, ranked as the top human resource issue that caused “material damage” for responding companies. Despite increasing labor costs, this year 34 percent of companies responded that China was not losing competitive advantage due to rising costs, compared to only 16 percent of companies last year. Therefore, although companies responded that labor costs are growing, China’s cost-based competitiveness has actually increased year-on-year.

2009年,日益提高的劳动力成本以及如何聘请优秀员工和管理人员仍然是美国在华企业面临的最重要的人力资源问题。据企业反映,其最大的人力资源问题是随着《劳动合同法》的颁布,很大程度上造成他们难以解雇表现不佳的员工并因此导致“物资损失”。尽管劳动力成本渐增,但今年有34%的企业表示中国并未因成本增加而丧失竞争优势,而去年这一比例仅为16%。因此,尽管企业称劳动力成本在不断上升,但中国的成本竞争力实际上却在逐年提高。

Chart 22

Top Risks for the Coming Years 企业面临的主要风险

Company sample size = 274
公司样本规模



Source: 2010 AmCham-China Business Climate Survey
资料来源：2010年中国美国商会商务环境调查

Chinese and global economic slowdown concerns rate as the top risks for the coming years. Increasing labor costs also rank quite high, although very few companies rank it as their top concern (only two percent).

对中国及全球经济放缓的担忧是未来几年企业面临的首要风险。虽然只有少数企业将日益增加的劳动力成本列为其首要关注的问题（仅有2%），但这同样也是一大风险。



www.amchamchina.org/businessclimate2010

AmCham-China

中 国 美 国 商 会

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

The American Chamber of Commerce
in the People's Republic of China

The Office Park, Tower AB, 6th Floor,
No. 10 Jintongxi Road, Chaoyang District,
Beijing, 100020, the People's Republic of China
Tel: (8610) 8519-0800
Fax: (8610) 8519-0899
Website: www.amchamchina.org

中国北京市朝阳区金桐西路10号,
远洋光华国际AB座6层
邮政编码: 100020
电话: (8610) 8519-0800
传真: (8610) 8519-0899
网址: www.amchamchina.org