

Business Climate Survey Data

For the past 13 years, AmCham-China has surveyed its membership to gauge the current business environment for US companies in China. In the *Business Climate Survey*, the questions aim to identify where our members see progress, where they are struggling and where they will allocate their company's resources. This year, 434 respondents participated in the *Survey* coming from all over China, including Beijing, Dalian, Tianjin and Central China (Wuhan), where AmCham-China has established chapters.

This year's data indicates that business performance has returned to pre-financial crisis levels, and many members have ambitious goals to expand their operations in China. However, the regulatory environment presents significant uncertainties and causes apprehension about the barriers foreign business may have to overcome in the future. AmCham-China hopes that the data from the *Business Climate Survey* will help government, business and policy leaders better understand the economic advantages and challenges to doing business in China.

《商务环境调查》数据

过去十三年里，中国美国商会每年对其会员企业开展一次调查，旨在了解在华美企当前所处的商务环境。在《商务环境调查》中，所提及的问题着眼于细化会员所看到的进步、面临的困难，以及如何配置公司资源。今年，共有 434 家来自中国各地的会员企业回答了问卷，包括北京、大连、天津和华中（武汉）等中国美国商会已设立办公室的地区。

本年度调查数据表明，企业经营业绩已经恢复至金融危机前的水平，许多会员企业已有扩大在华业务的宏伟计划。但监管环境仍存在很大不确定性，致使外资企业对于未来需要克服的市场障碍心存担忧。中国美国商会期望《商务环境调查》数据能够帮助中国政府、商界和政策制定者更好地了解中国所独具的经济优势和企业在华经商所面临的挑战。

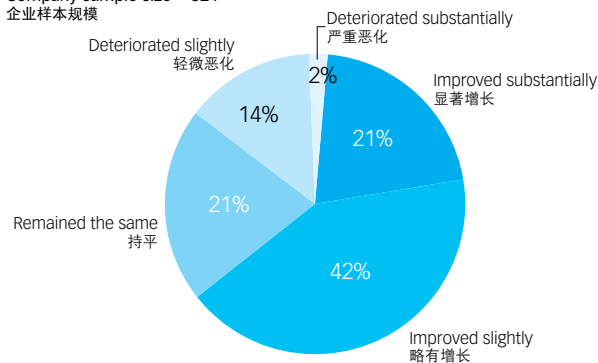
Key Charts 主要图表

How do the overall 2010 operating margins of your China operations compare to those of 2009?

企业2010年在华运营利润率与2009年相比

Company sample size = 321

企业样本规模



1

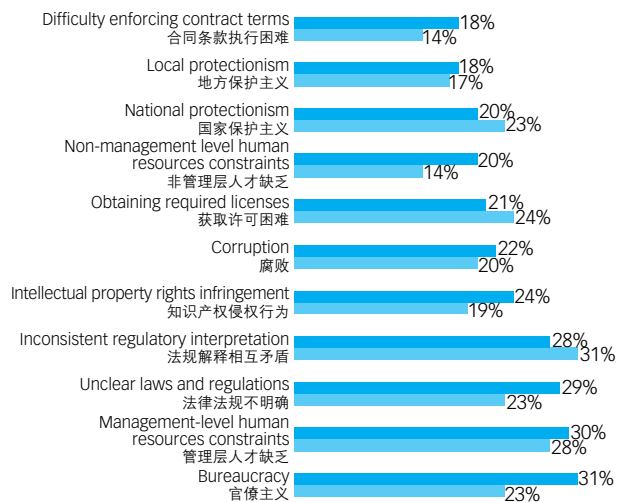
Issues reported as top-five business challenges

企业在华运营的五大挑战

Company sample size = 2010=318

企业样本规模

2011=338

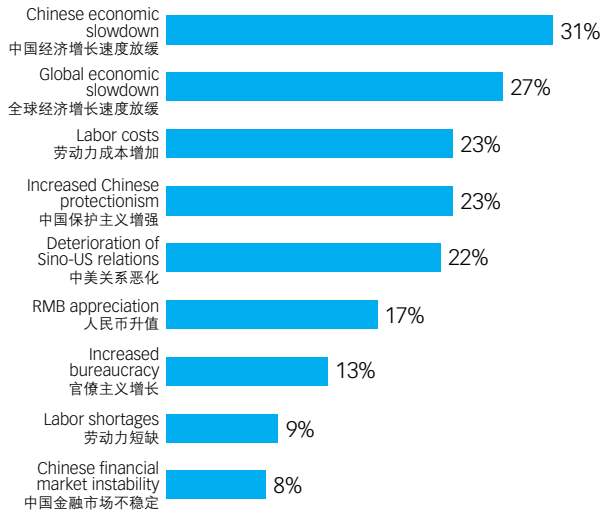


2

What do you think are the greatest risks facing your China organization?

企业面临的主要风险

Company sample size = 337
企业样本规模

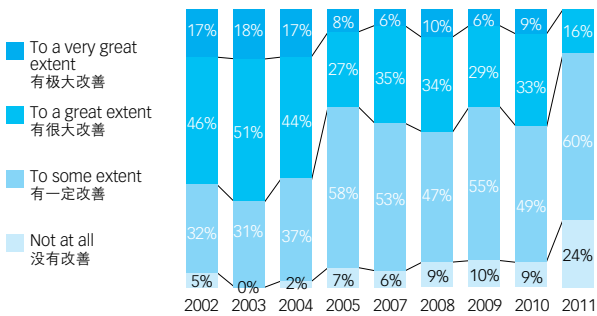


3

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

Company sample size = 208 254 236 352 140 571 271 273 311
企业样本规模

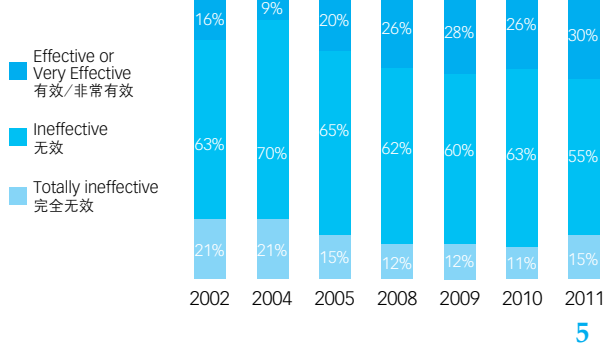


4

How would you rate China's enforcement of intellectual property rights?

企业对中国政府保护知识产权执行力的评估

Company sample size = 219 210 331 389 129 146 251
企业样本规模

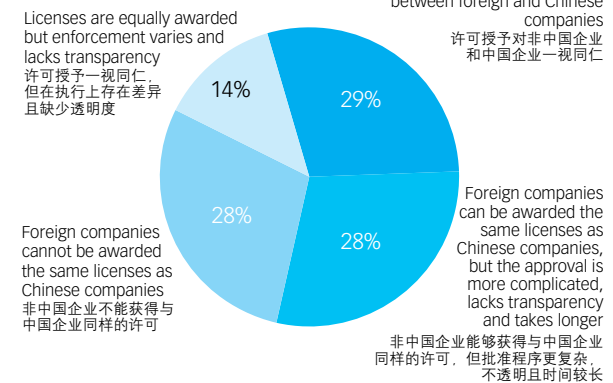


5

How are the relevant licenses in your industry applied?

企业所在行业相关许可申请情况

Company sample size = 248
企业样本规模



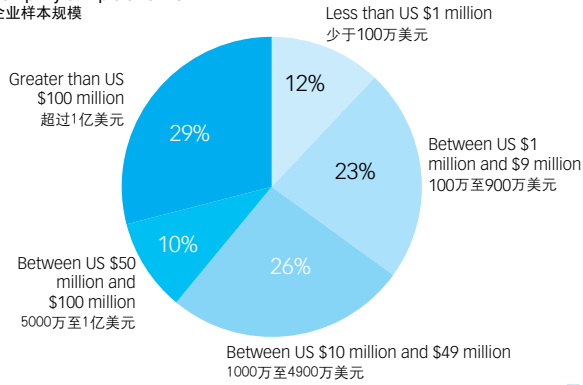
6

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

What are your forecasted total annual China revenues for 2010?

企业对2010年在华总收入的预期

Company sample size = 322
企业样本规模

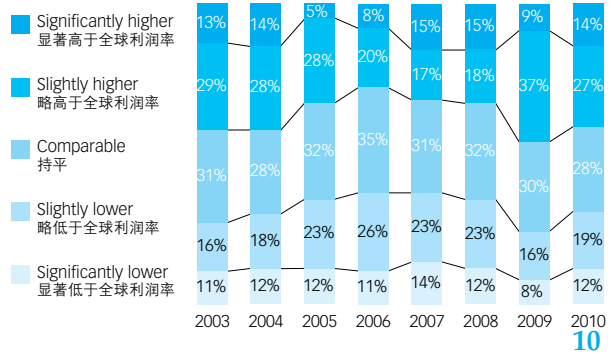


7

China margins compared to worldwide margins (calendar years 2003-2010)

2003-2010年企业在华利润率与其全球利润率的比较

Company sample size = 181 171 145 95 576 239 240 291
企业样本规模

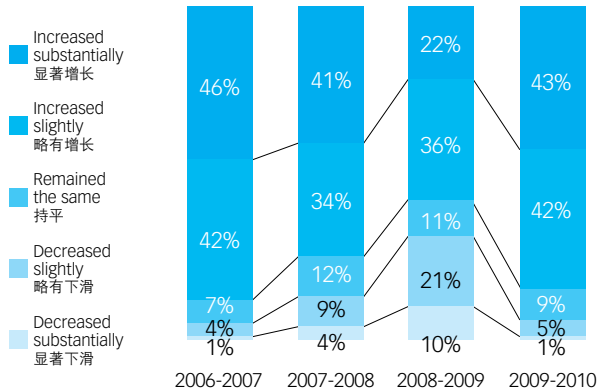


10

How does the 2010 revenue of your China operations compare to 2009 results?

企业2010年在华运营收入与2009年相比较

Company sample size = 2007=126, 2008=658, 2009=282, 2010=280
企业样本规模

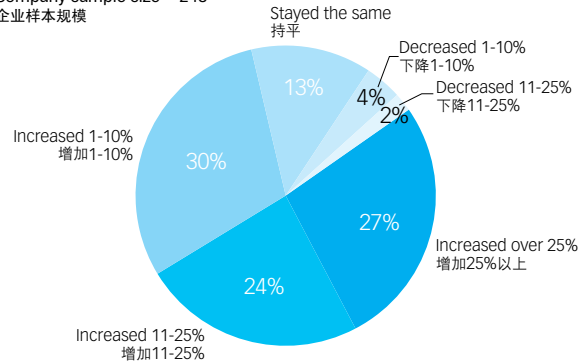


8

How did your company's production in China change over the past year?

企业在华生产产量与上一年的比较

Company sample size = 248
企业样本规模

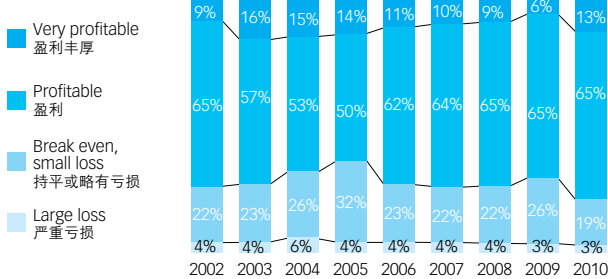


11

Companies' financial performance in China year-on-year

2002-2010年企业在华财务状况

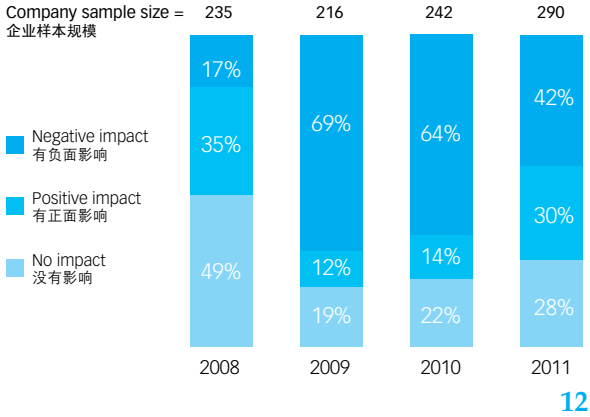
Company sample size = 254 236 376 203 150 737 338 319 336
企业样本规模



9

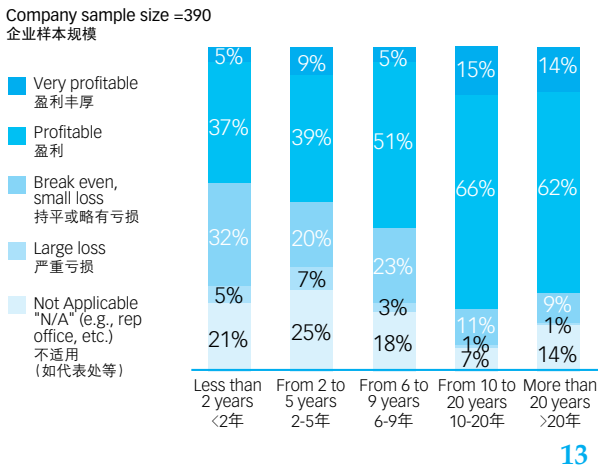
What impact did global economic conditions have on your company's China operations?

全球经济状况对于企业在华运营的影响



Profitability by length of time in China

企业利润率与在华营运时间的关系

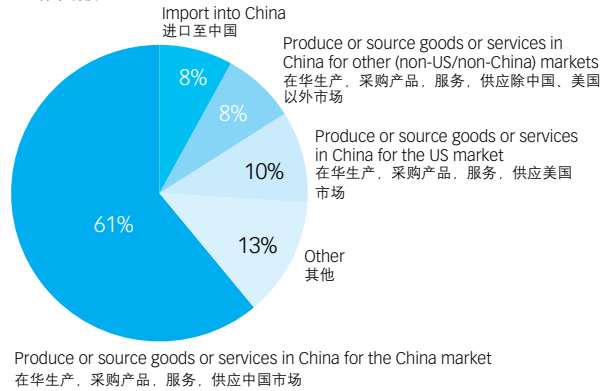


Business Strategy 经营战略

Top goals and strategies in China

企业在华首要目标和战略

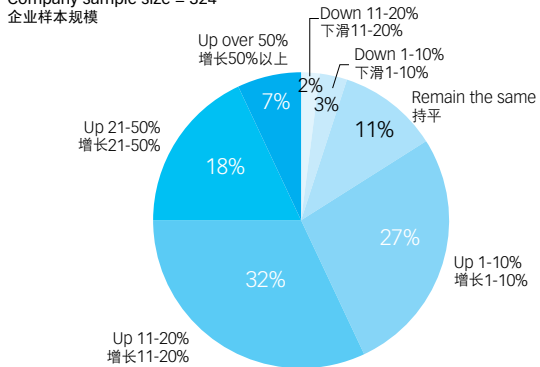
Company sample size = 350
企业样本规模



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

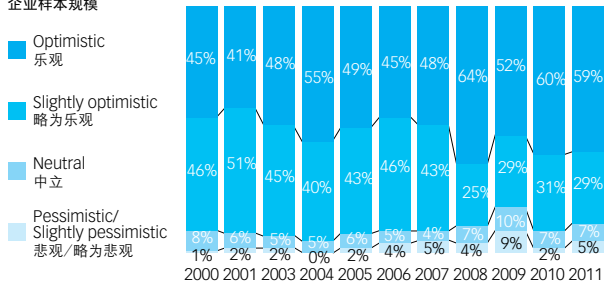
Company sample size = 324
企业样本规模



How would you describe your five-year business outlook in China?

企业对未来五年在华发展的展望

Company sample size = 160 173 173 236 397 213 154 618 270 274 341
企业样本规模

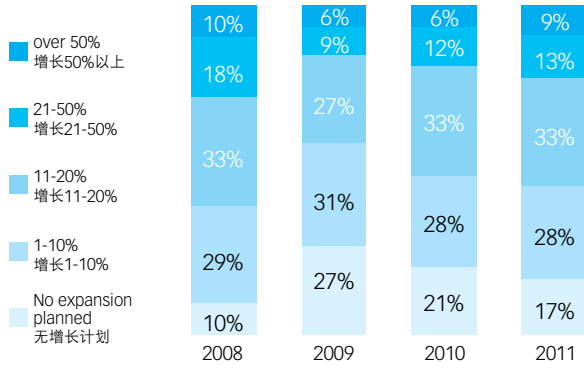


Business Strategy 经营战略

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

Company sample size = 2011=281
企业样本规模

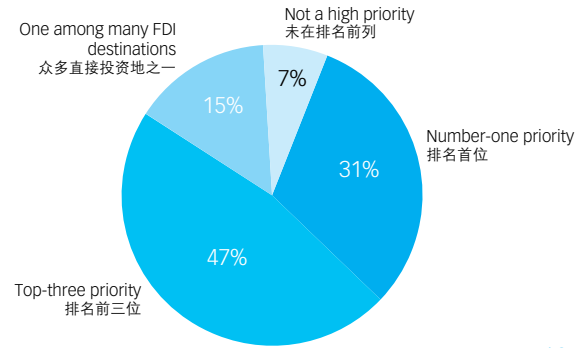


17

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 = 299
企业样本规模

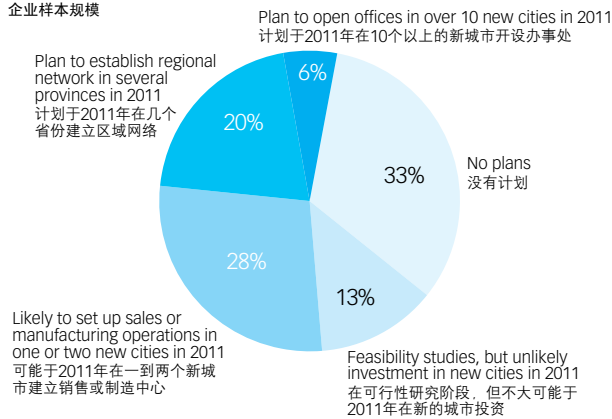


19

In 2011, excluding the first-tier cities Beijing/Shanghai/Guangzhou, does your business plan to expand beyond current locations into second and third-tier cities (e.g., Dalian and Chengdu)?

2011年，除北京、上海、广州等一线城市外，企业是否计划向二、三线城市扩张(如大连和成都)

Sample size = 270
企业样本规模

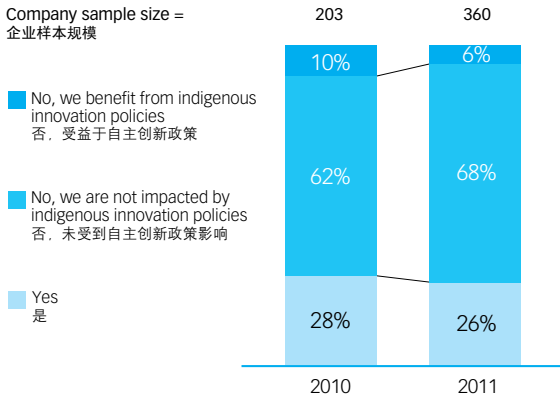


18

National Treatment and Industrial Policy 国民待遇与产业政策

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

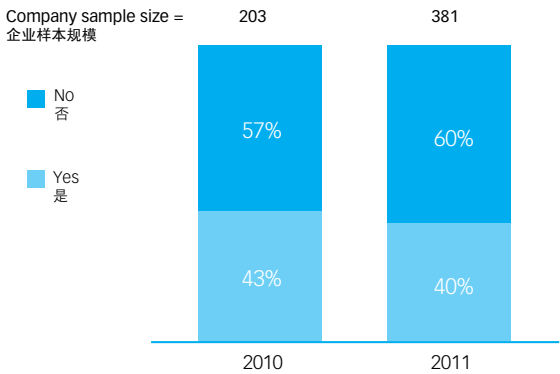
企业在中国的业务是否受到自主创新政策的影响而处于不利地位



20

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

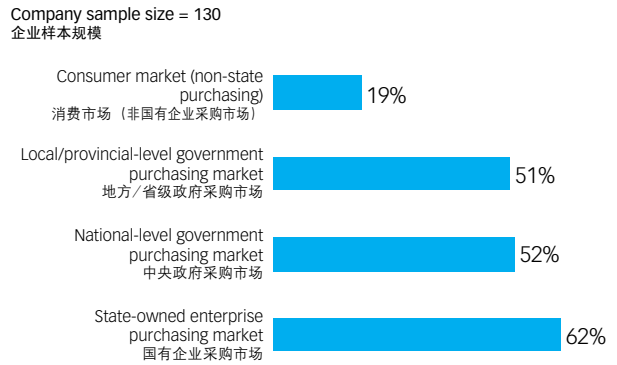
企业是否认为中国的自主创新政策将对其产生负面影响或持续造成更大影响



21

Under China's indigenous innovation policies, in what segments of the market do you feel that your business is losing out or will lose out? Check all that apply.

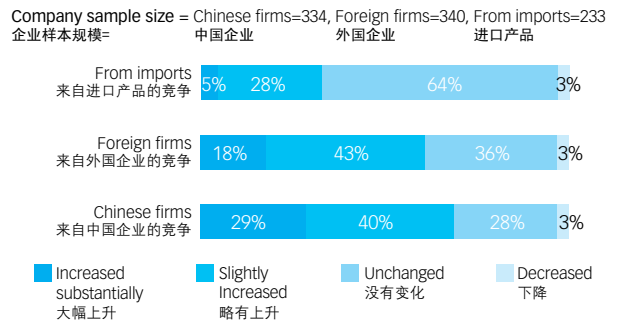
企业在哪些细分市场中，会因中国的自主创新政策而处于不利地位



22

How would you rate competition for your company's products and services in China in 2010 versus 2009?

2010年企业产品及服务的竞争压力与2009年相比较



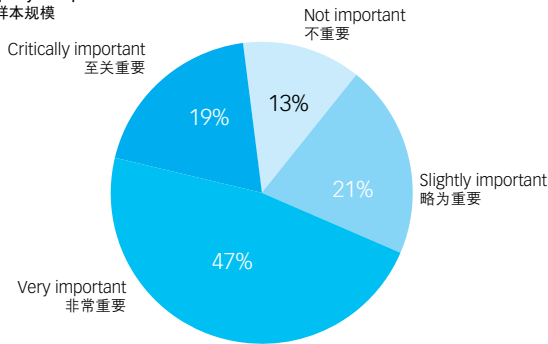
23

Intellectual Property Rights 知识产权

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

知识产权保护对企业发展的重要性

Company sample size = 331
企业样本规模

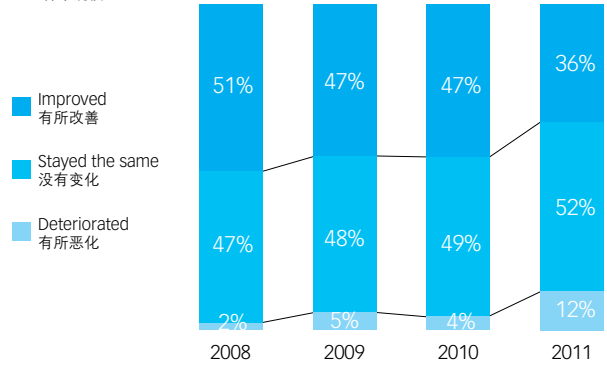


24

Perceived enforcement of IPR in China year-on-year

2008-2011年，中国知识产权执法情况逐年比较

Company sample size = 405
企业样本规模

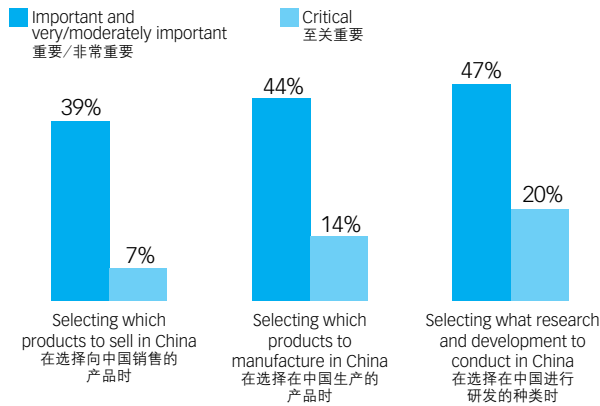


26

How important a factor is IPR when...?

在以下情况下，知识产权对企业的重要性

Company sample size = 205
企业样本规模

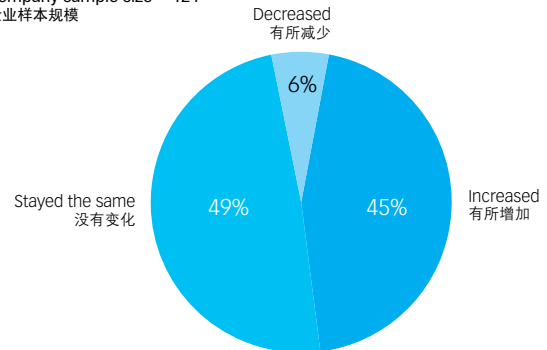


25

In the last year, the volume of counterfeits of your organization's products produced in China has...?

去年，源于中国的侵权产品数量的变化

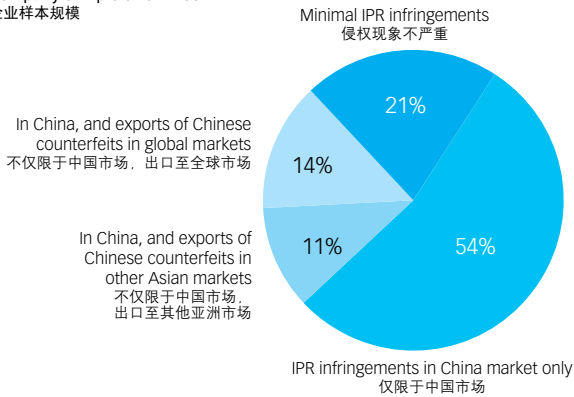
Company sample size = 121
企业样本规模



27

What is the breadth of infringing products (e.g., your company's products) originating from China?
源于中国的侵权产品所涉及的范围

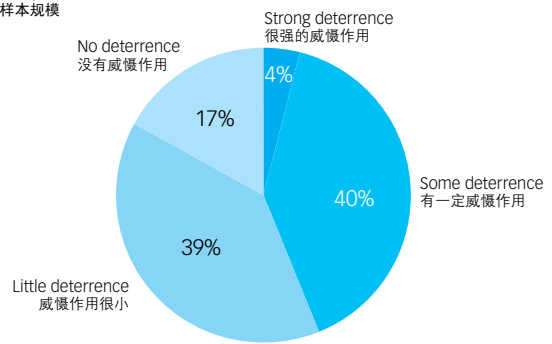
Company sample size = 108
企业样本规模



28

To what extent do you believe administrative actions you have taken on IPR will deter further infringements?
企业通过行政手段打击侵权行为对进一步侵权行为所产生的威慑作用

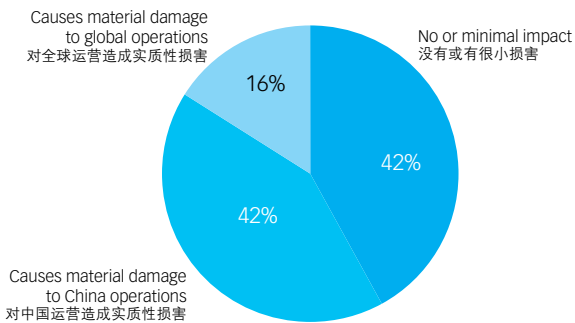
Company sample size = 107
企业样本规模



30

What is the extent of damage caused by China-originating IPR infringements of your company's products?
源自中国的侵权产品对企业造成的损害

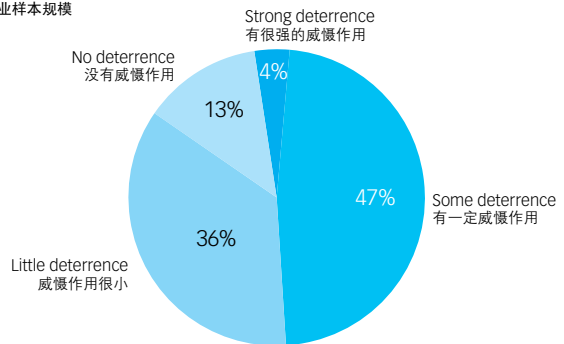
Company sample size = 130
企业样本规模



29

If you have brought any infringements to court, do you think the result will deter other infringers?
企业将侵权行为诉诸法律对进一步侵权行为所产生的威慑作用

Company sample size = 76
企业样本规模



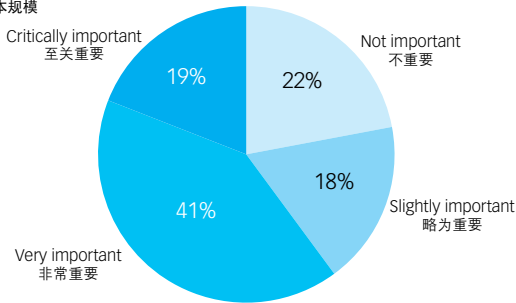
31

Licensing and Market Access 许可和市场准入

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

获得许可对企业经营的重要性(如新增分支机构、设立零售网点、产品及服务许可)

Company sample size = 348
企业样本规模

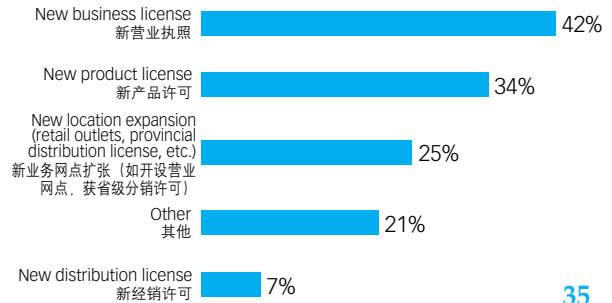


32

Which licenses are difficult to obtain? Check all that apply

企业难以获得的许可种类(选择所有适用项)

Company sample size = 220
企业样本规模

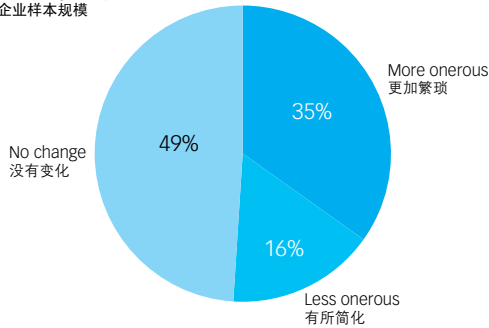


35

How has 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

Company sample size = 249
企业样本规模

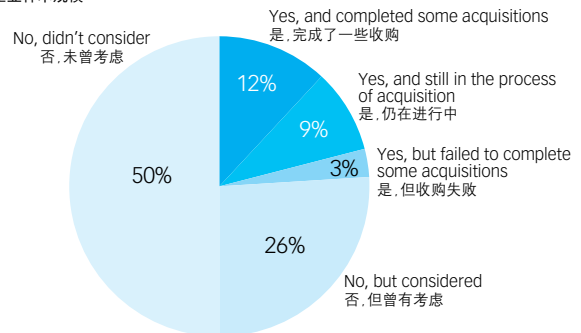


33

Did your company pursue an acquisition of a Chinese company or a Chinese company's assets in the last 24 months?

企业是否曾在过去两年中试图收购一家中国本土企业或其资产

Company sample size = 262
企业样本规模

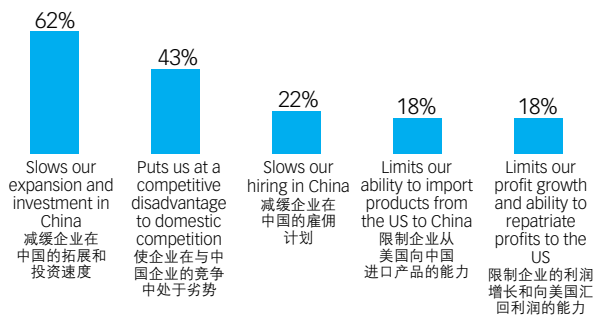


36

How do licensing requirements impact your business? Check all that apply.

许可要求对企业业务经营的影响(选择所有适用项)

Company sample size = 219
企业样本规模

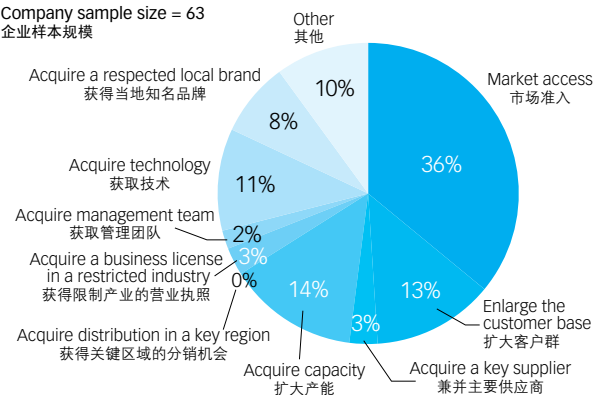


34

For the acquisitions pursued in the last 24 months, what was the top purpose in pursuing the acquisition?

企业过去两年中试图收购本土企业的主要目的

Company sample size = 63
企业样本规模



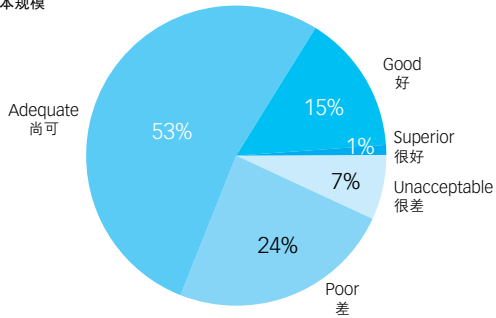
37

Other Charts of Interest 其他相关图表

How would you rate China's compliance with its WTO commitments to date?

企业对目前中国履行入世承诺的评价

Company sample size = 294
企业样本规模

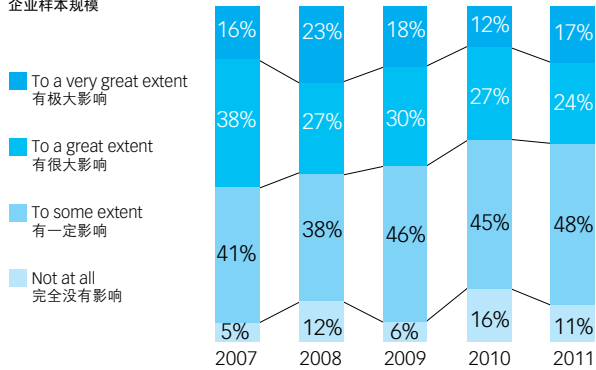


38

To what extent do you believe the quality of the US-China commercial relationship affects your business?

中美贸易关系对企业运营的影响程度

Company sample size = 141, 261, 239, 244, 299
企业样本规模

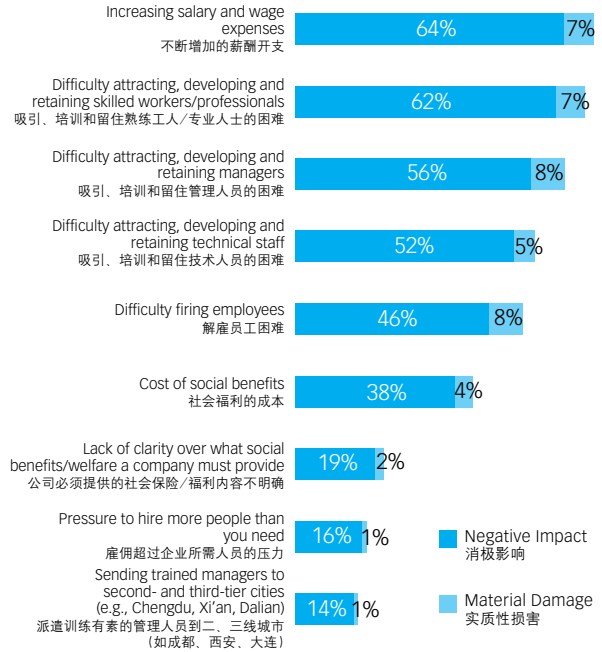


39

How do the following human resources issues affect your business operation 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 = 303
企业样本规模

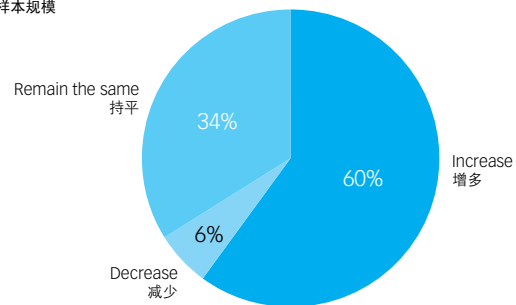


40

Do you expect to see an increase, decrease or the same amount of labor litigation in the next few years?

企业对未来几年中劳工纠纷数量的预测

Company sample size = 222
企业样本规模



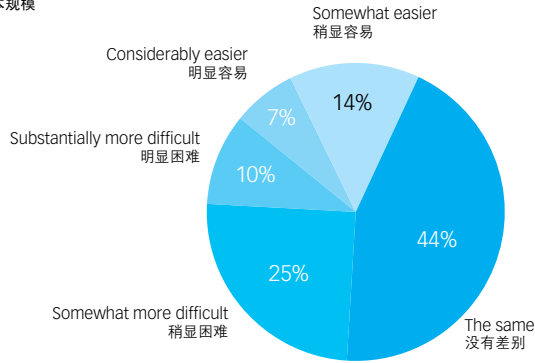
41

Other Charts of Interest 其他相关图表

In 2010, how difficult was it for the Chinese citizens you work with (employees, customers and suppliers) to travel to the US relative to other regions?

2010年，中国公民（企业雇员、客户和供应商）赴美签证难度与到其他地区相比较

Company sample size = 279
企业样本规模

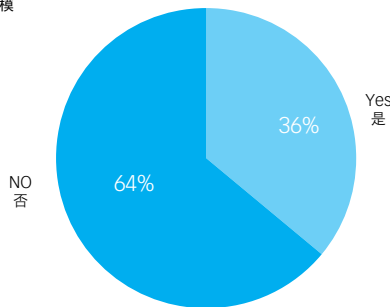


42

Do you intentionally avoid arranging meetings in the US for suppliers, customers and/or employees because of concerns about obtaining visas?

企业是否会因签证原因有意避免在美国会见供应商、顾客和/或雇员

Sample size = 233
企业样本规模

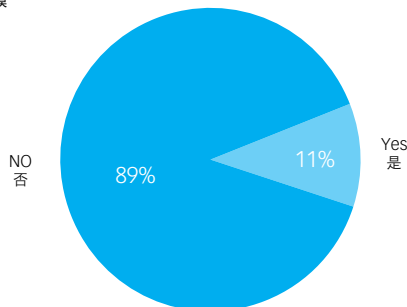


43

For 2010, have you lost significant sales or business relationships to non-US competition because your customers either refuse to apply for visas to the US or have been rejected for visas?

在2010年，企业是否因为客户拒绝申请赴美签证或申请签证被拒而失利于非美竞争对手，失去重大的销售或商业机会

Company sample size = 177
企业样本规模

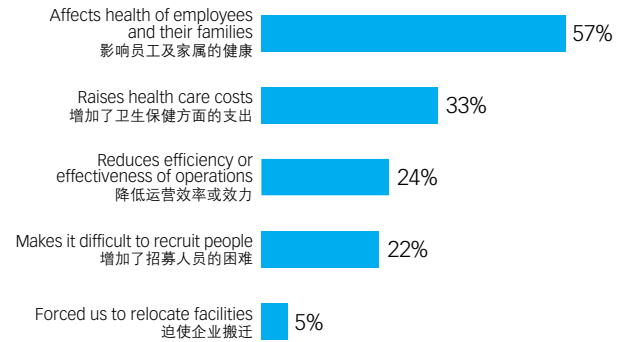


44

How has the pollution affected your business in China? Check all that apply.

污染对企业在华运营的影响(选择所有适用项)

Company sample size = 243
企业样本规模

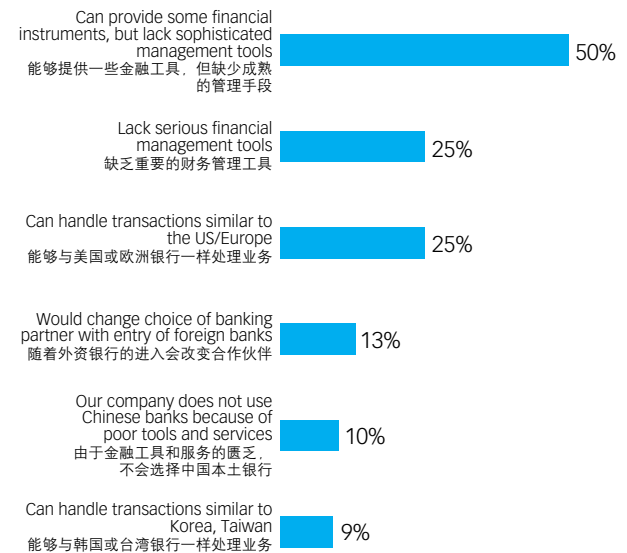


45

How would you rate Chinese domestic banks' ability to provide the banking services you need? Check all that apply.

对中国本土银行提供服务能力的评价(选择所有适用项)

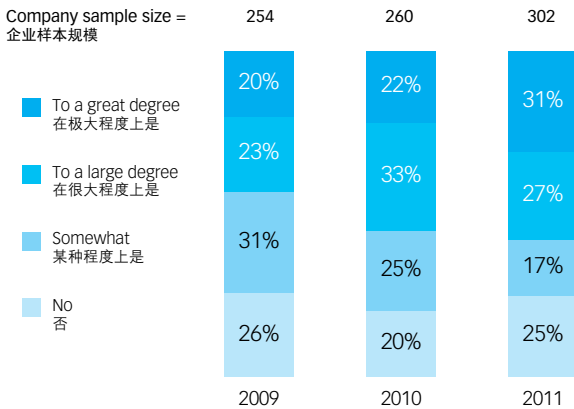
Company sample size = 240
企业样本规模



46

Is your company paying more attention to the product quality and safety issues of goods manufactured in China?

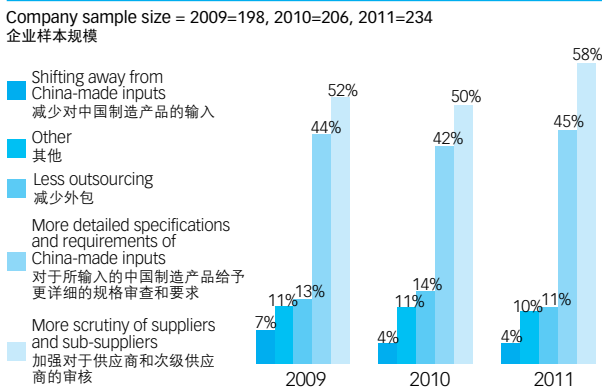
企业是否更加重视在中国制造的产品质量与安全问题的



47

If your company is paying more attention to the quality and safety of China-made goods, in what areas are you focusing? Check all that apply.

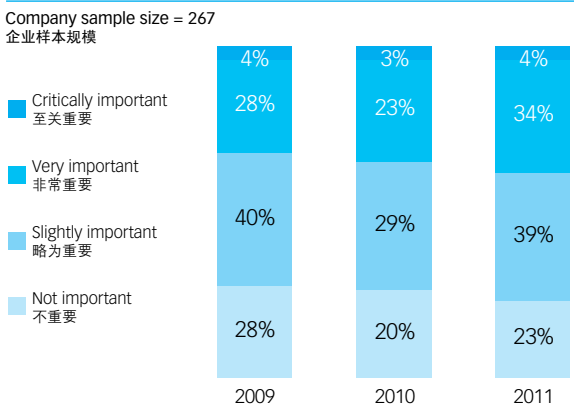
若企业更加关注于中国制造的产品质量和安全，具体体现在哪些方面



48

How important were favorable tax policies for your initial decision to invest in China (calendar years 2009-2011)?

优惠的税收政策对企业最初在华投资决策作用(2009-2011年)

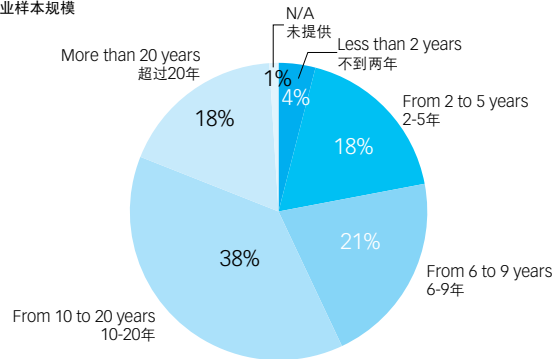


49

Survey Profile 受访者基本情况

How long has your company had a physical presence in China? 企业在华实体成立时间

Company sample size = 434
企业样本规模

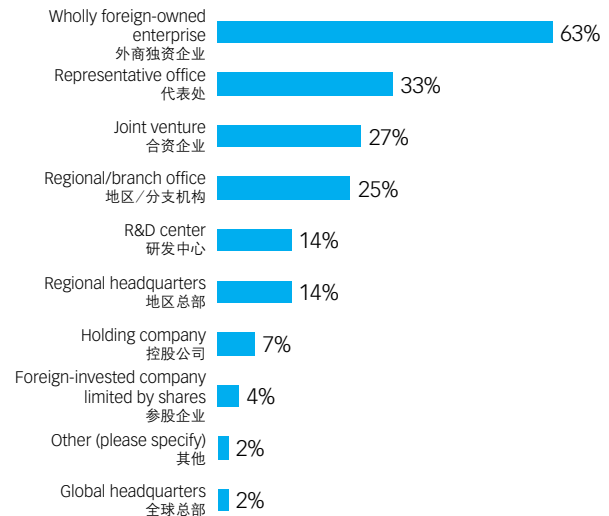


50

Which of the following legal entities does your company have in China? Check all that apply.

企业在华经营的形式(选择所有适用项)

Company sample size = 432
企业样本规模

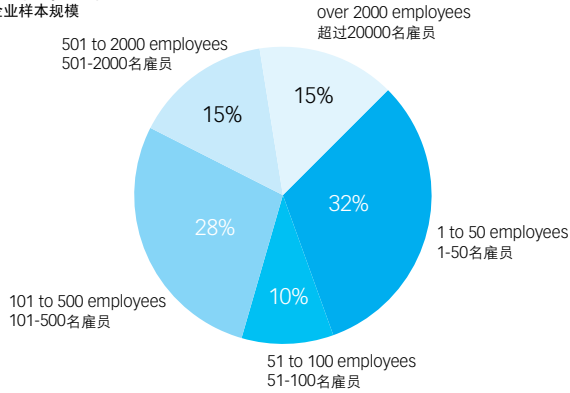


51

Survey Profile 受访者基本情况

How many employees does your company have in China? 企业在华雇员人数

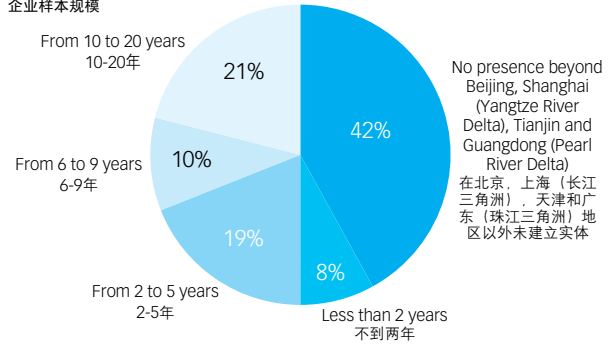
Company sample size = 433
企业样本规模



52

How long has your company had a physical presence in China's second- and third-tier cities? 企业在中国二、三线城市建立实体的时间

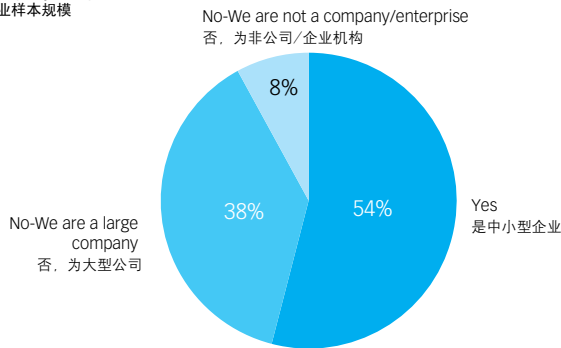
Company sample size = 350
企业样本规模



55

Would you identify your company as a small- or medium-sized enterprise? 企业是否自定义为中小型企业

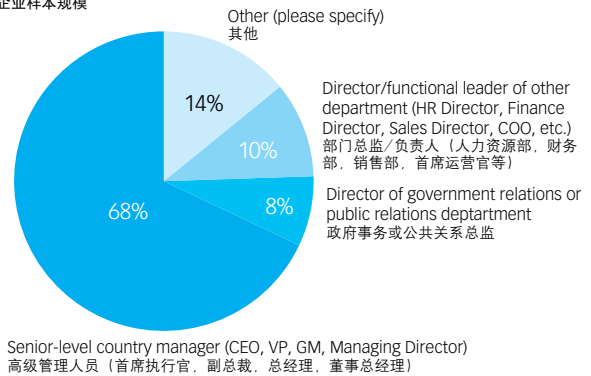
Company sample size = 434
企业样本规模



53

As the survey respondent, please tell us about your position in your company. 问卷反馈人员的职务

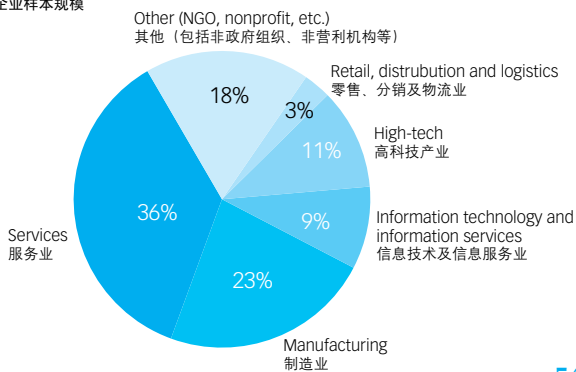
Company sample size = 434
企业样本规模



56

Which of the following categories best describes your main line of business in China? 问卷反馈企业所涉及的行业

Company sample size = 434
企业样本规模



54

