

Business Climate Survey Data

Every year, AmCham China surveys its members to gauge the economic and regulatory situation they face on the ground in China. As in previous years, the 14th annual *Business Climate Survey* not only tracks year-on-year data to mark progress or decline, but also adds new questions in an attempt to measure the impact of recent policies or trends that members have raised in meetings throughout the year. This year, the *Business Climate Survey* added new questions about the Internet and technology transfer in order to get a better sense of anecdotal information we have received from member companies. All the responses help AmCham China pursue our advocacy efforts with a clearer image of our members' business environment.

We send the *Business Climate Survey* to our members between November and December each year in order to assess the year's performance. This year, we had 390 responses from our members in Beijing, and our chapters in Northeast China (Dalian), Tianjin, and Central China (Wuhan). Reports from this year's Survey indicate that AmCham China member companies still had good revenue growth and profits, similar to the strong performance from last year. However, concerns about economic slowdowns globally and in China rose to the levels surveyed during the financial crisis. Additionally, member companies continue to face obstacles in the protection of their intellectual property, obtaining licenses, attracting and retaining qualified employees, and managing rising costs. The data from the *Business Climate Survey* informs our members, the US and Chinese governments, and our own advocacy priorities going forward.

《商务环境调查》数据

中国美国商会每年都会对会员开展问卷调查，藉此评估他们当前在中国所处的经济和法规环境。与往年一样，第14次年度《商务环境调查》不仅进行了同期数据比较，提出了进步或不足，还增加了会员在全年各类会议中所提出的新问题，目的是为了衡量近期政策或趋势对会员所造成的影响。今年，《商务环境调查》增加了诸如互联网和技术转让等新问题，旨在更好地理解会员企业所反馈的一些信息。所有的这些反馈帮助中国美国商会更加清楚地了解会员企业所处的商务环境，从而有利于我们谏言献策。

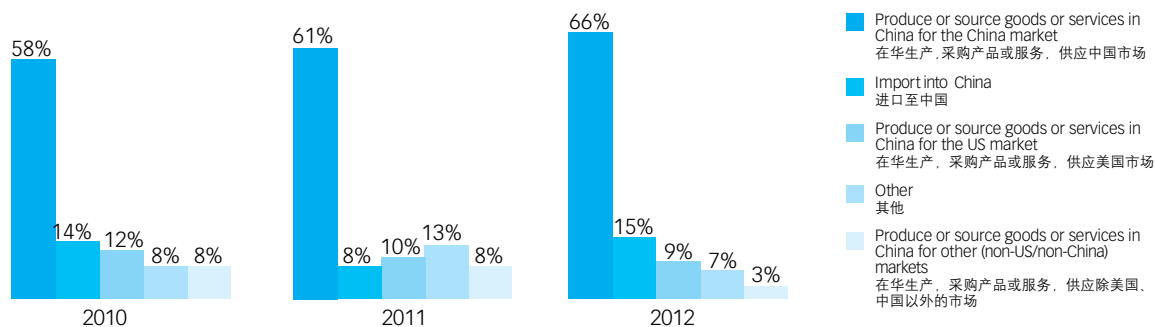
每年的《商务环境调查》会在11月到12月间对会员发放，以便了解其全年业绩。今年，我们从北京、东北（大连）、天津和华中（武汉）等商会设立办公室的地区收到了390家会员企业的调查反馈。今年的调查报告显示，中国美国商会会员企业继续保持了良好的收入和利润增长，与去年的优异表现持平。然而，对国际以及中国经济增速放缓的担忧已经达到了金融危机期间调查时的水平。此外，会员企业在知识产权保护、获取许可、留住合格人才以及控制成本增长等方面仍面临诸多问题。《商务环境调查》将继续对我们的会员企业，美、中两国政府以及商会未来谏言献策提供数据支持。

Key Charts 主要图表

What are your company's primary goals and strategies in China? Select all that apply in order of importance.

企业在华的首要目标和战略, 请按重要性排序

Company sample size: 2012 = 321 2011 = 326 2010 = 274
企业样本规模

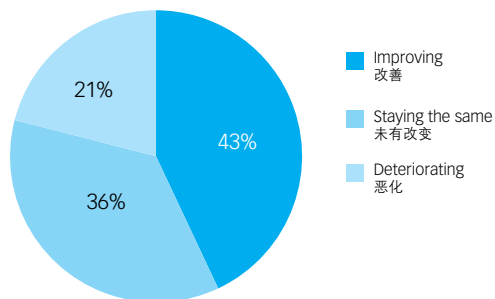


1

The quality of China's investment environment is:

中国投资环境质量

Company sample size = 333
企业样本规模

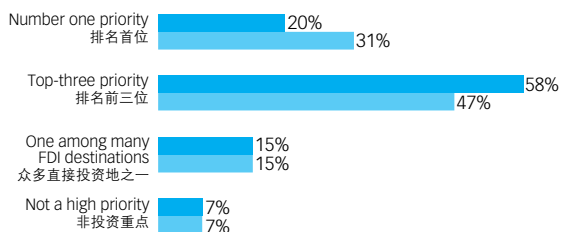


2

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: 2012 = 306 2011 = 299
企业样本规模

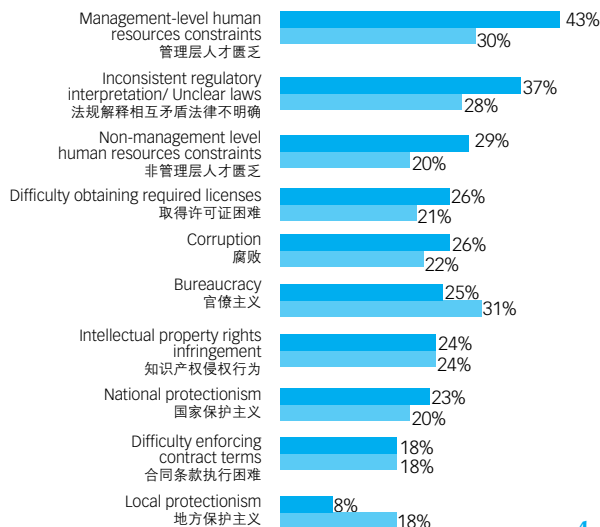


3

Top business challenges.

企业在华运营的主要挑战

Company sample size: 2012=339 2011=250
企业样本规模



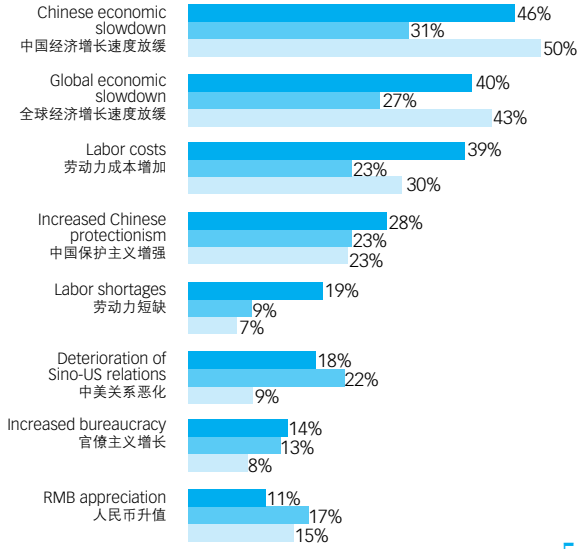
4

Key Charts 主要图表

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

企业在华运营面临的主要风险

Company sample size: 2012 = 321 2011 = 337 2010 = 262
企业样本规模

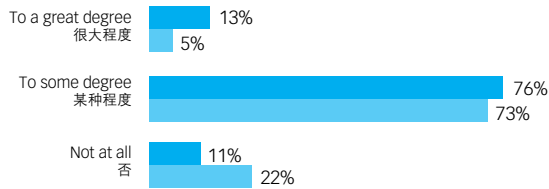


5

Do you feel that China is losing competitive advantages due to rising costs? 中国是否由于成本不断增加而逐渐失去竞争优势?

中国是否由于成本不断增加而逐渐失去竞争优势?

Company sample size: 2012 = 298 2011 = 340
企业样本规模



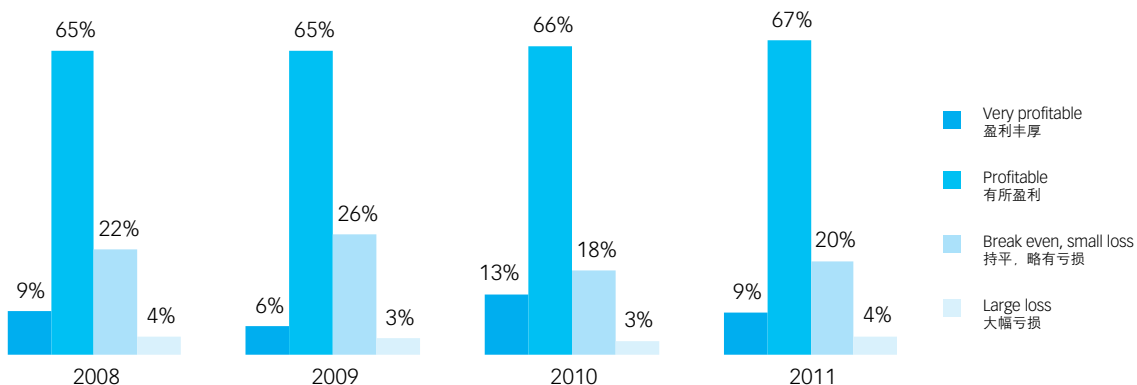
6

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

How would you characterize your company's financial performance in China in 2011?

公司2011年在华财务状况

Company sample size: 2011 = 303 2010 = 336 2009 = 319 2008 = 338
企业样本规模

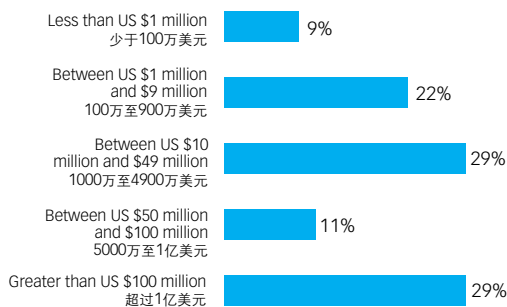


7

What are your forecasted total annual China revenues for 2011?

企业2011年在华总收入的预期

Company sample size = 305
企业样本规模

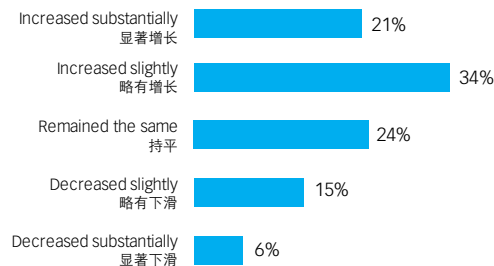


8

How do the overall 2011 operating margins of your China operations compare to those of 2010?

企业2011年在华运营净利润与2010年相比较

Company sample size = 294
企业样本规模

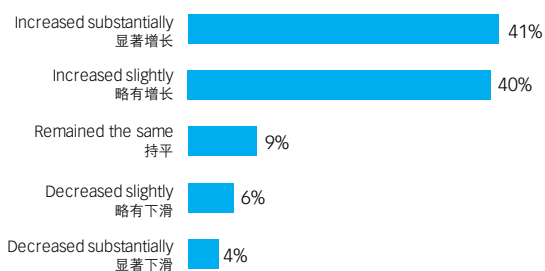


10

How does the 2011 revenue of your China operations compare to 2010 results?

企业2011年在华运营收入与2010年相比较

Company sample size = 308
企业样本规模

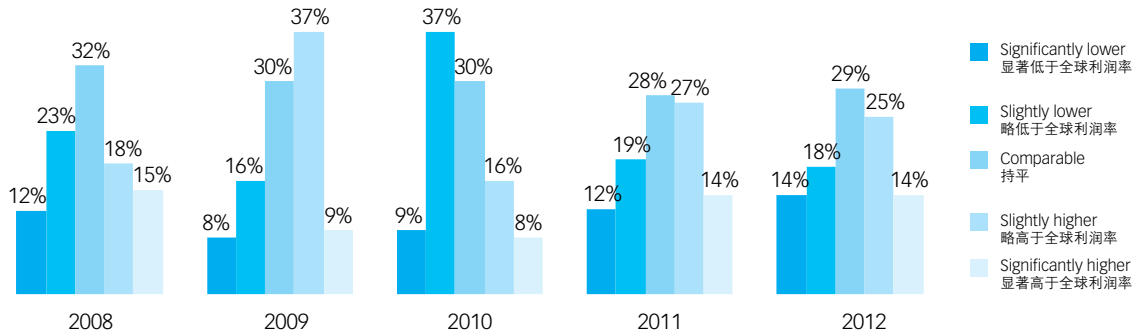


9

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

How do the 2011 operating margins of your China operations compare to your company's worldwide operating margins? 2011年企业在华利润率与其全球利润率的比较

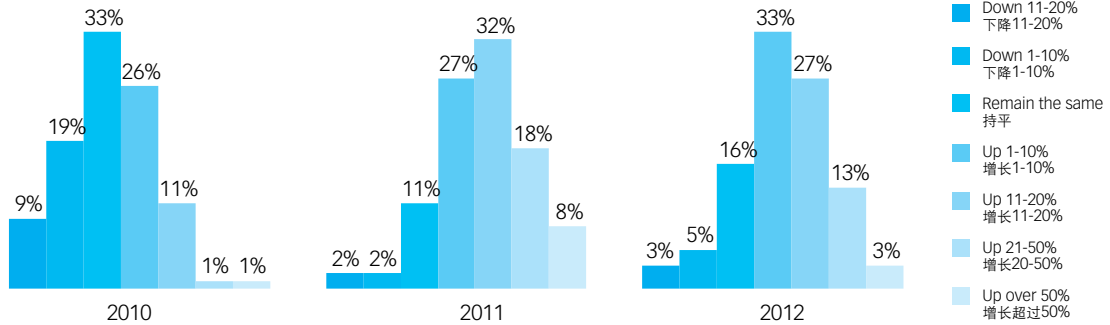
Company sample size: 2012 = 270 2011 = 321 2010 = 273 2009 = 240 2008 = 239
企业样本规模



11

What is your forecast for 2012 China revenues compared to 2011? 企业2012年在华运营收入预期与2011年相比较

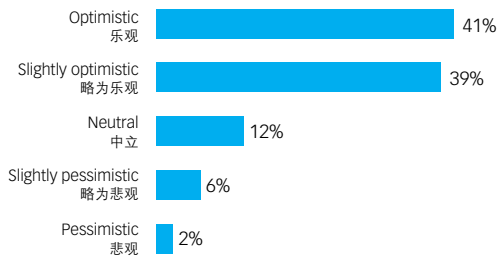
Company sample size: 2012 = 305 2011 = 324 2010 = 288
企业样本规模



12

How would you describe your two-year business outlook in China? 企业对其未来两年商业前景的预期

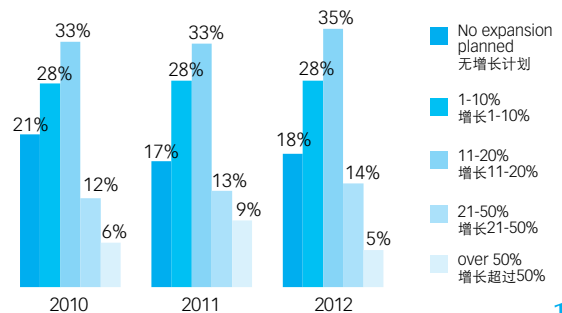
Company sample size = 333
企业样本规模



13

How much do you estimate your company will increase investment in China operations for 2012? 企业对2012年在华运营投资增长的预期

Company sample size: 2012 = 287 2011 = 281 2010 = 232
企业样本规模

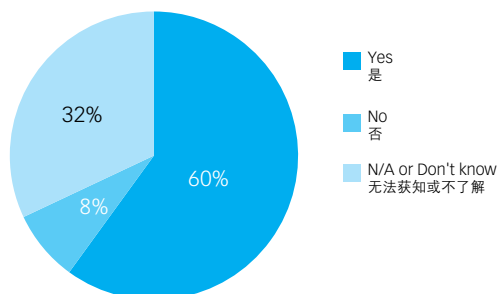


14

In the next year does your company plan to use China-generated profits to fund investments in your business in China?

公司明年是否计划将在华获得的盈利继续用于在华投资?

Company sample size = 328
企业样本规模

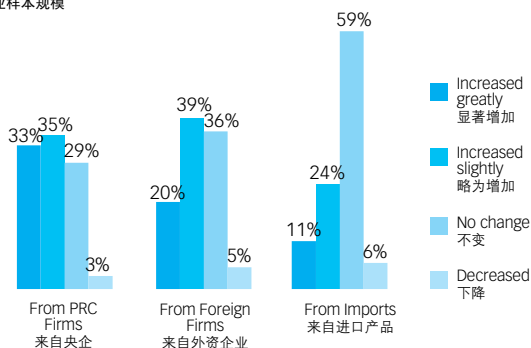


15

How would you rate competition for your company's products and services in China in 2011 versus 2010?

较2010年相比, 企业如何评价2011年在华的产品及服务所受到的竞争压力

Company sample size = 303
企业样本规模



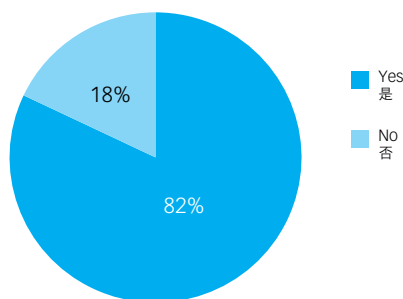
16

Labor Costs and Human Resources

Are rising labor costs affecting your business operations?

不断增长的人力成本是否影响企业运营?

Company sample size = 287
企业样本规模

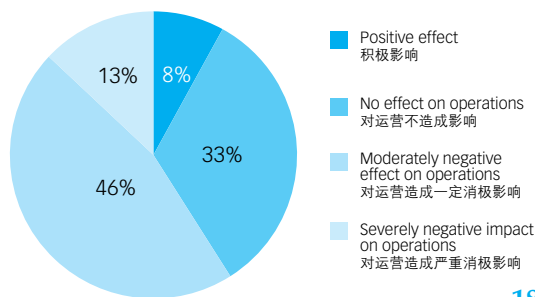


17

What effect will the implementation of the proposed social insurance taxes on foreign employees in China have on your business operations?

实施向在华就业的外国雇员征收社会保险将对企业运营造成何种影响?

Company sample size = 321
企业样本规模

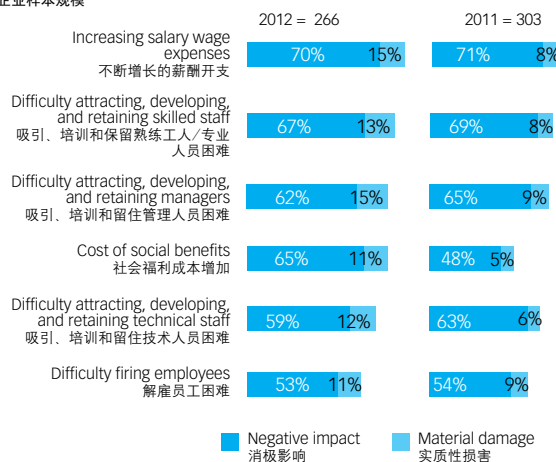


18

How do the following human resources issues affect your business operations in China?

下列相关人力资源问题对企业在华运营产生的影响

Company sample size:
企业样本规模



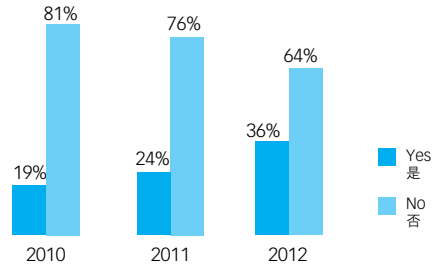
19

Labor Costs and Human Resources 劳动成本与人力资源

Have you or your organization experienced any difficulties in recruiting senior executive talent to work in China because of air quality issues?

企业是否因空气质量问题，招聘在华工作的高级管理人才时遇到困难？

Company sample size: 2012 = 210 2011 = 294 2010 = 244
企业样本规模

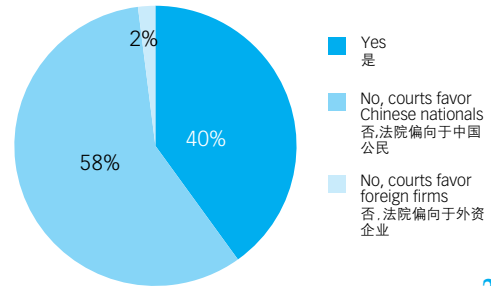


20

Have you found courts in China to provide equal treatment to local and foreign parties when it comes to labor litigation?

遇到劳工纠纷时，法院对本地和外国当事人是否一视同仁？

Company sample size = 88
企业样本规模

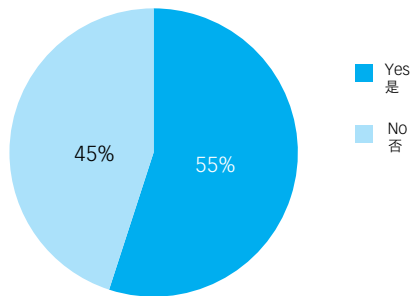


23

Has your company found it more difficult to dismiss employees since the adoption of the Employment Contract Law?

《劳动合同法》的实施，是否使企业解雇员工更加困难？

Company sample size = 247
企业样本规模

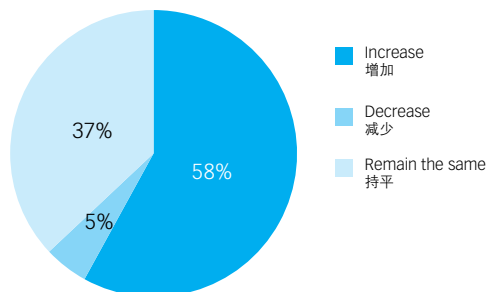


21

This year what do you see as the trend in the number of labor litigation cases brought to court?

企业对今年劳工纠纷诉讼案件数量趋势的预测

Company sample size = 138
企业样本规模



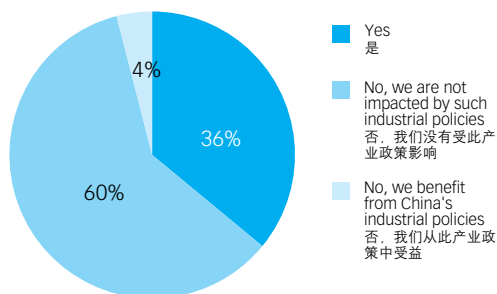
22

Industrial Policy, Tech Transfer, and Licensing 产业政策，技术转移与许可

Do you feel that your company is losing out on business in China as a result of industrial policies that promote and support Chinese companies over foreign companies?

您是否认为由于促进和支持中国本土企业多于外企的产业政策致使公司在华业务亏损？

Company sample size = 303
企业样本规模

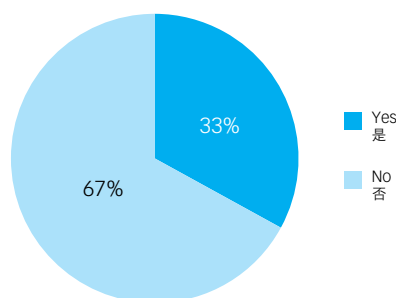


24

At times, China has forced technology or knowledge transfers from foreign companies in exchange for market access. Are the effects of such practices negatively impacting your company or clients' assessment of the business environment in China?

中国有时以换取市场准入为条件迫使外企进行知识或技术转让。该做法是否对企业或客户评估在华运营环境时造成负面影响？

Company sample size = 297
企业样本规模

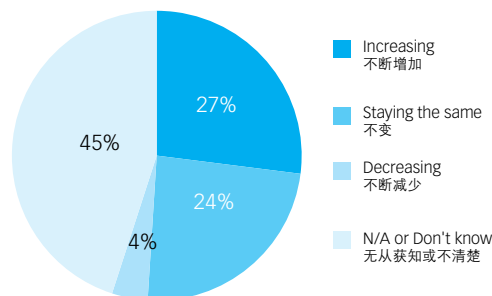


25

In your experience, forced technology transfer in China is:

在您看来，强迫性技术转让在华的状况为？

Company sample size = 301
企业样本规模

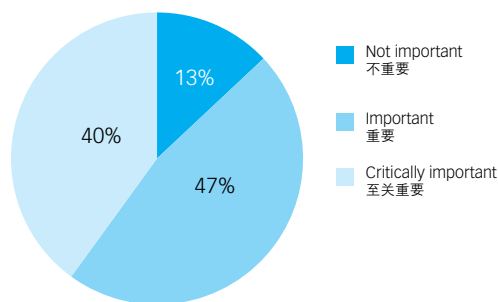


26

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）

Company sample size = 254
企业样本规模

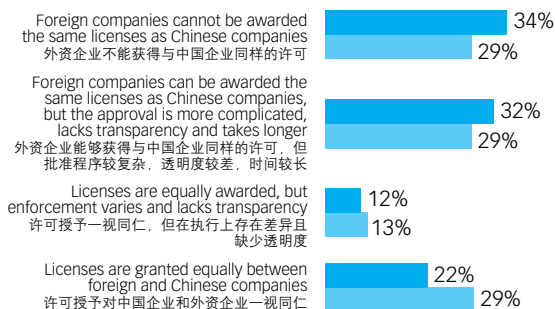


27

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: 2012 = 175, 2011 = 248
企业样本规模



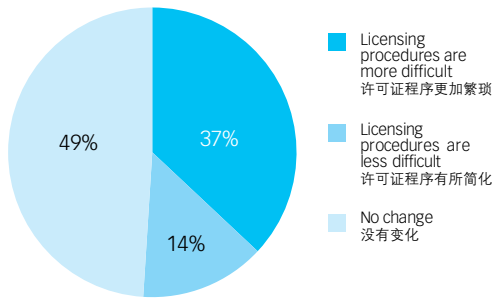
28

Intellectual Property Rights 知识产权

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证的变化情况

Company sample size = 178
企业样本规模

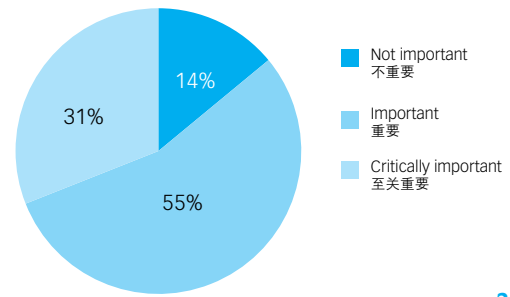


29

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 = 277
企业样本规模

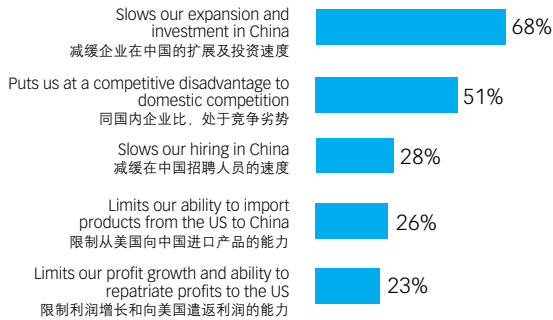


31

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

许可要求对企业经营的影响

Company sample size = 152
企业样本规模

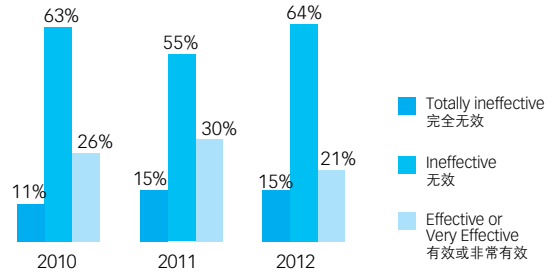


30

How would you rate China's enforcement of IPR?

企业对中国政府保护知识产权执行力的评估

Company sample size: 2012 = 200 2011 = 251 2010 = 146
企业样本规模

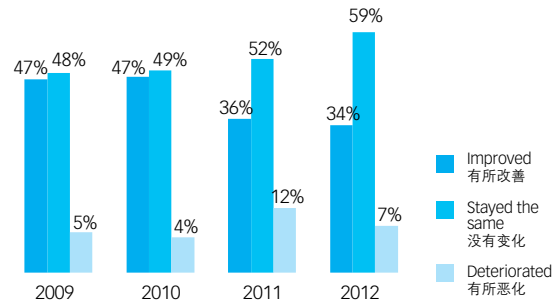


32

In the last year, China's enforcement of IPR has:

去年中国知识产权的执法情况

Company sample size: 2012 = 152 2011 = 149 2010 = 148 2009 = 131
企业样本规模

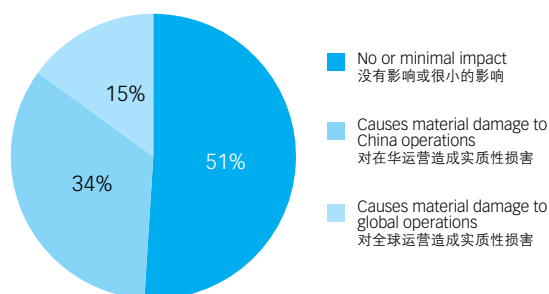


33

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

Company sample size = 144
企业样本规模

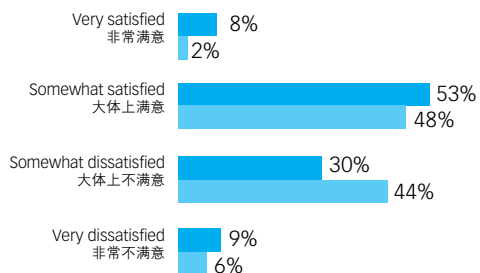


34

If you have taken administrative action, how satisfied were you with the level of cooperation from the relevant Chinese officials?

企业通过行政诉讼打击侵权行为时对中国政府相关官员合作情况的满意程度

Company sample size: 2012 = 154 2011 = 184
企业样本规模

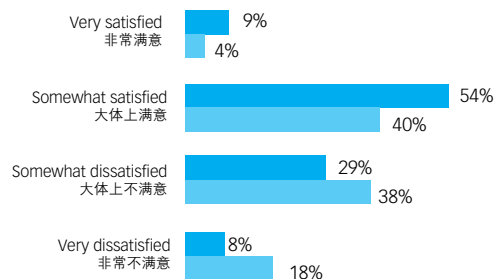


35

If you have brought any infringements to court, were you satisfied with the level of cooperation from the Chinese courts?

企业将侵权行为诉诸法律时对中国法院合作情况的满意程度

Company sample size: 2012 = 131 2011 = 70
企业样本规模

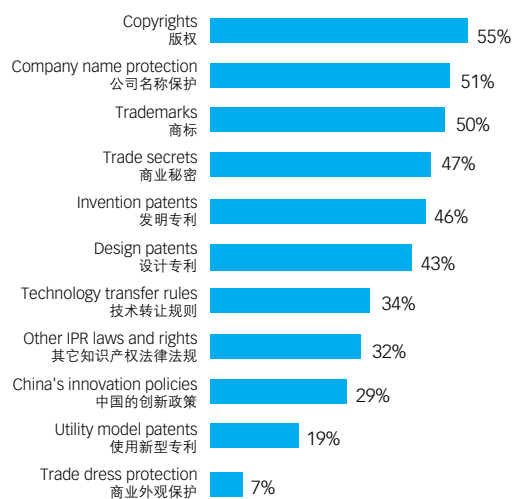


36

Please rank the following in terms of their importance with regard to protecting your company's intellectual property.

根据公司知识产权保护内容的重要性排序

Company sample size = 215
企业样本规模



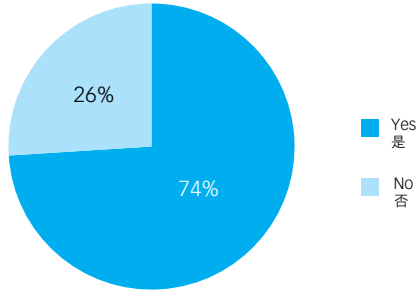
37

Internet and Cyber Security 互联网与网络安全

Does slow or unstable Internet access impede your ability to efficiently conduct business in China?

互联网网速慢或不稳定是否降低企业在华运营的效率

Company sample size = 301
企业样本规模

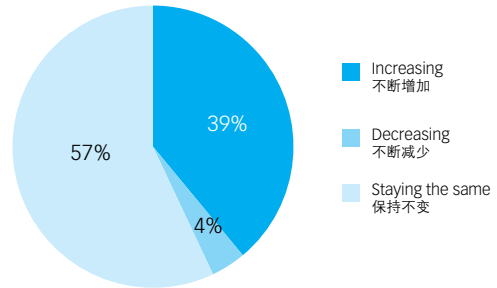


38

In your experience, the risk of a data breach to your China operations is:

您认为公司在华运营数据受到破坏的风险为

Company sample size = 201
企业样本规模

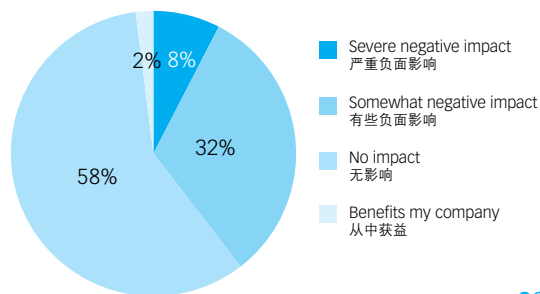


41

To what degree does Internet censorship impact your company's ability to conduct business normally in China?

网络审查对企业正常运营产生的影响

Company sample size = 299
企业样本规模

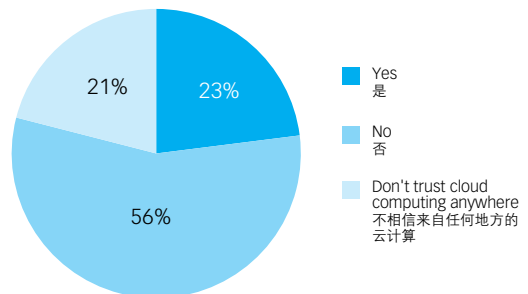


39

Does your company trust cloud computing in China?

企业是否信赖中国的云计算技术?

Company sample size = 134
企业样本规模

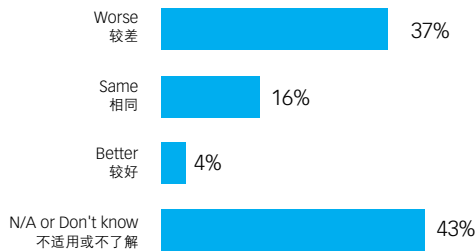


42

How does the cyber security environment in China compare with that of other countries?

中国的网络安全环境与其他国家相比

Company sample size = 319
企业样本规模

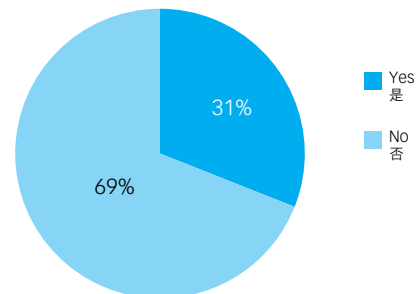


40

Is your company shifting resources or services to the cloud?

企业是否正向云计算转移资源或服务?

Company sample size = 232
企业样本规模



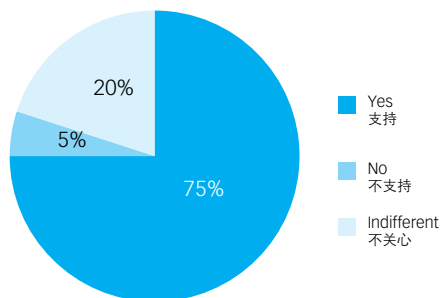
43

Other Charts of Interest 其他相关图表

Do you support Chinese investment in the US?

是否支持中国在美国投资

Company sample size = 333
企业样本规模

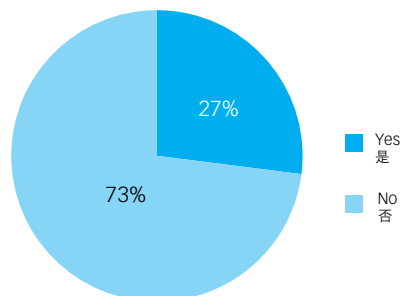


44

Have your intentions changed in regards to M&A in China as a result?

企业并购本土企业的目标是否有改变?

Company sample size = 44
企业样本规模

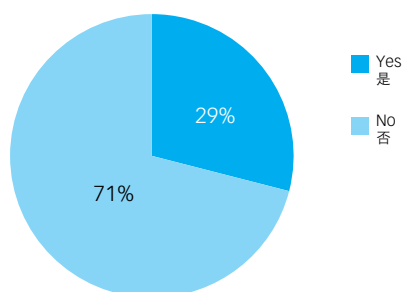


47

Have you pursued any mergers or acquisitions (M&A) in China in the last two years?

企业在过去两年中是否并购过本土企业?

Company sample size = 234
企业样本规模

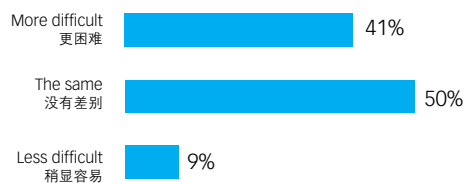


45

In comparison to previous years, pursuing M&A in China is:

和前几年相比，在华并购本土企业的状况?

Company sample size = 116
企业样本规模



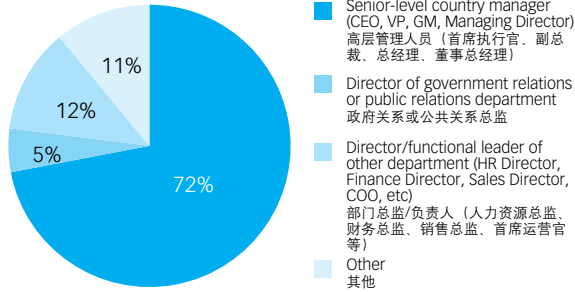
46

Survey Profile 受访者基本情况

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 = 387
企业样本规模

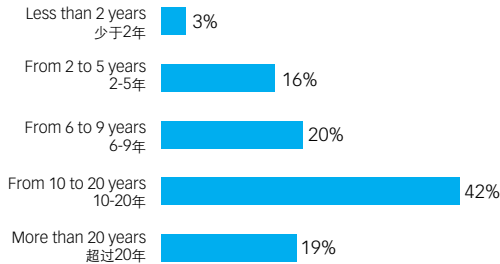


48

How long has your company had a physical presence in China?

企业在华实体成立多长时间?

Company sample size = 384
企业样本规模

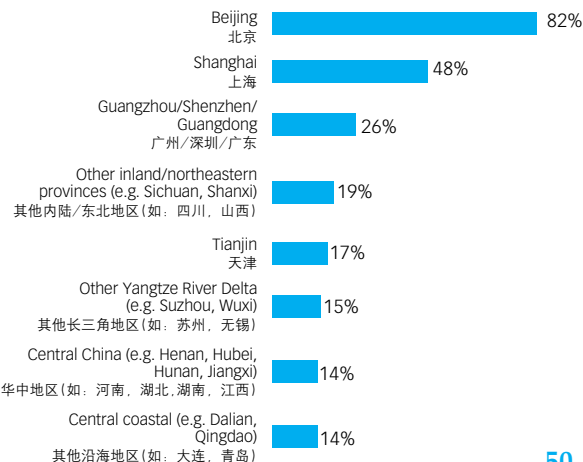


49

Where does your company have a legal presence? Please check all that apply.

企业在以下哪些地方建立了合法实体? 选择所有适用项

Company sample size = 384
企业样本规模

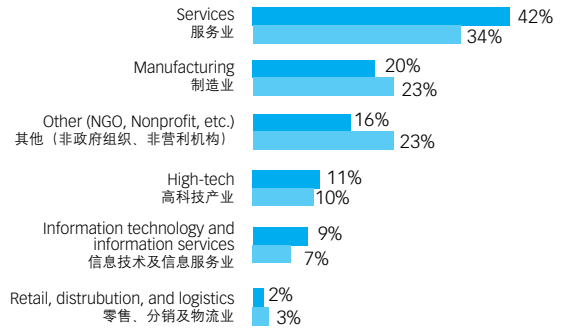


50

Which of the following categories best describes your main line of business in China?

企业在华主要业务范畴

Company sample size: 2012 = 390 2011 = 388
企业样本规模

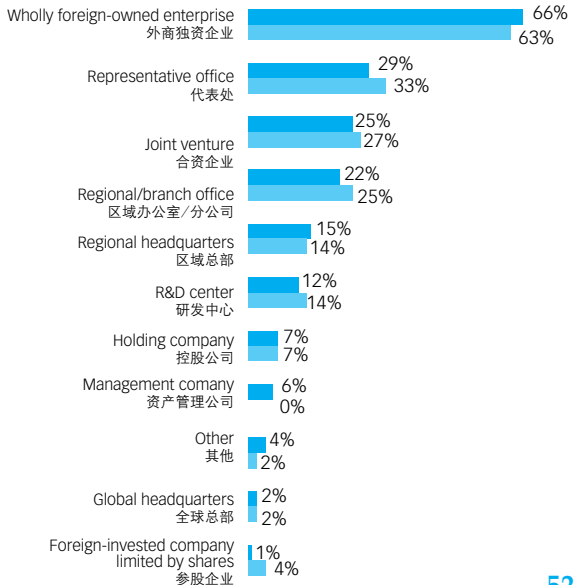


51

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

企业在华法律实体的具体形式为? 选择所有适用项

Company sample size: 2012 = 384 2011 = 432
企业样本规模

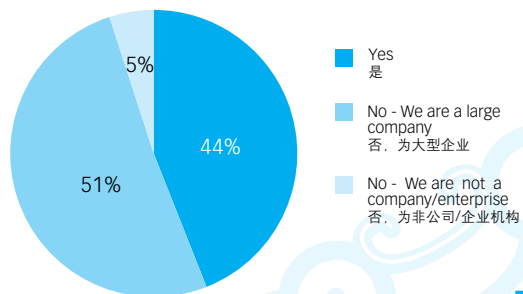


52

Would you identify your company as a small- or medium-sized enterprise (no more than 300 employees)?

企业是否自定义为中小型企业（雇员人数不超过300人）

Company sample size = 390
企业样本规模

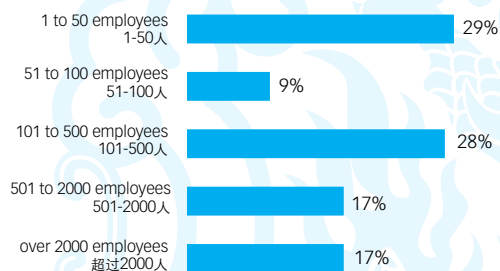


53

How many employees does your company have in China (including subsidiaries and joint ventures)?

企业在华雇员人数（包括子公司及合资公司）

Company sample size = 380
企业样本规模



54