

China Business Climate Survey Report
年度商务环境调查报告

2013

AmCham China 2013 China Business Climate Survey Report

中国美国商会《2013 年度商务环境调查报告》

About the Business Climate Survey

This marks the 15th year that the American Chamber of Commerce in the People's Republic of China (AmCham China) has conducted an annual Business Climate Survey. The 2013 survey is based upon responses from 325 of our members, including those based in Beijing as well as our chapters in Northeast China (Dalian), Tianjin, and Central China (Wuhan). The survey offers a valuable snapshot of member concerns on China's regulatory and policy environment, illustrating long-term improvements in the business climate as well as areas of difficulty. As such, the survey plays an essential role in helping determine the chamber's advocacy priorities both in Beijing and Washington.

We would like to thank all our members who took the time to participate in the survey. Your input is greatly valued.

关于商务环境调查

今年是中国美国商会 (AmCham China) 开展年度商务环境调查的第十五年。2013 年的调查以中国美国商会的 325 个会员企业的反馈情况为基础, 这些会员企业来自北京以及本商会的东北地区 (大连)、天津以及华中地区 (武汉) 分支机构。调查为我们提供了有价值的简报, 反映了会员企业的担忧, 并显示商务环境长期内的改善, 及存在困难的领域。因此, 调查在帮助中国美国商会和华盛顿的美国商会确定其工作的优先领域方面起着重要作用。

我们感谢中国美国商会所有抽出时间参与调查的会员。我们非常珍视你们的意见。

Survey Profile

325 Respondents

63% Senior-level country management; 15% Director or functional leader of other department; 8% Director of government relations or public relations department; 8% Other; 6% Chief Representative

31% Services; 28% Manufacturing; 22% Other; 10% High-tech; 8% Information technology and information services; 1% Retail, distribution, and logistics

70% Wholly-owned foreign enterprise; 30% Regional/branch office; 26% Representative Office; 26% Joint Venture; 19% R&D Center; 17% Regional Headquarters; 8% Management company; 8% Holding company; 3% Global headquarters; 3% Other; 2% Foreign-invested company limited by shares

The survey was conducted in November and December of 2012.

商务调查说明

325 个受访者

中国区总经理, 高级管理人员占 63%; 部门总监或职能领导占 15%; 政府关系或公共关系总监占 8%; 其他占 8%; 首席代表占 6%

服务业占 31%; 制造业占 28%; 其他占 22%; 高科技企业占 10%; 信息技术企业占 8%; 零售、分销和物流业占 1%

外商独资企业占 70%; 区域办公室或分支机构占 30%; 代表处占 26%; 中外合资企业占 26%; 研发中心占 19%; 区域总部占 17%; 管理公司占 8%; 控股公司占 8%; 全球总部占 3%; 其他占 3%; 外国投资股份有限公司占 2%

本调查开展于 2012 年 11 月至 12 月。



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Chairman's Summary

The 2013 Business Climate Survey results reflect a corporate outlook that broadly accords with China's own revised economic goals in an era of rebalancing: expectations for growth, but at a more tempered pace than seen just a few years ago; investment expansion, yet at a more moderate rate than in the past.

As China enters a new period geared towards higher-quality GDP growth, our member companies are adjusting to structural shifts in the economy. Rising labor costs are now considered as great a business risk as a Chinese economic slowdown. (And worries over global economic health that arose in the global financial crisis years have faded).

Meanwhile, China's ranking as a destination for global investment declined slightly compared to year-ago levels, though over two thirds of respondents still list it as at least a top-three global priority.

Against a backdrop of relatively slower growth and rising costs in China, our member companies are paying close attention to the potential impact of government policies. In this year's survey, the percentage of respondents who say China's investment environment is improving fell markedly – in line with the widespread impression that market reform and opening has slowed in recent years.

Specifically, survey respondents voiced continued concerns over difficulties in obtaining business licenses, pressure to transfer technology, inadequate protection of intellectual property rights, and the potential for corporate data breaches.

Despite such challenges, most respondents say they are optimistic about their two-year outlook in China. Meanwhile, a steadily-growing majority of our members aim to sell to China's fast-growing consumer and business markets (as opposed to exporting China-made goods abroad). This year, 71 percent of respondents say their main goal is to produce or source goods in China for the Chinese market.

Taking heed of the changing realities outlined above, we will continue to advocate for policies that promote more competitive and open markets, with the goal of helping our members succeed and building a business climate that benefits all companies, domestic and foreign, in China.

主席致辞

2013年商务环境调查的结果显示商业前景与中国在调整转型期重新设立的经济目标总体吻合：预计业务继续增长，但速度较前几年趋缓；投资仍将扩大，但速度也将比过去更为平稳。

随着中国进入追求高质量GDP增长的新阶段，我们的会员企业也正在根据中国经济结构的调整状况作相应的转变。劳动力成本上升目前成为与中国经济减缓受同等关注的重大商业风险。（在全球金融危机中一直上升的对全球经济健康状况的担忧有所下降）。

同时，与去年相比，中国市场对全球投资者的吸引力也略有下降，尽管仍有超过2/3的受访者仍将中国列入投资首选地前三名。

在中国经济增长相对放缓和经营成本上升的背景下，我们的会员企业正在密切关注中国政府相关政策的潜在影响。在今年的调查中，认为中国投资环境正在改善的受访者比例显著降低——这也和中国市场改革开放的速度近年来减慢的普遍印象是一致的。

具体而言，调查受访者对申请营业执照难、技术转让压力大、知识产权保护不力以及企业数据可能遭侵权等问题的继续表示极度关切。

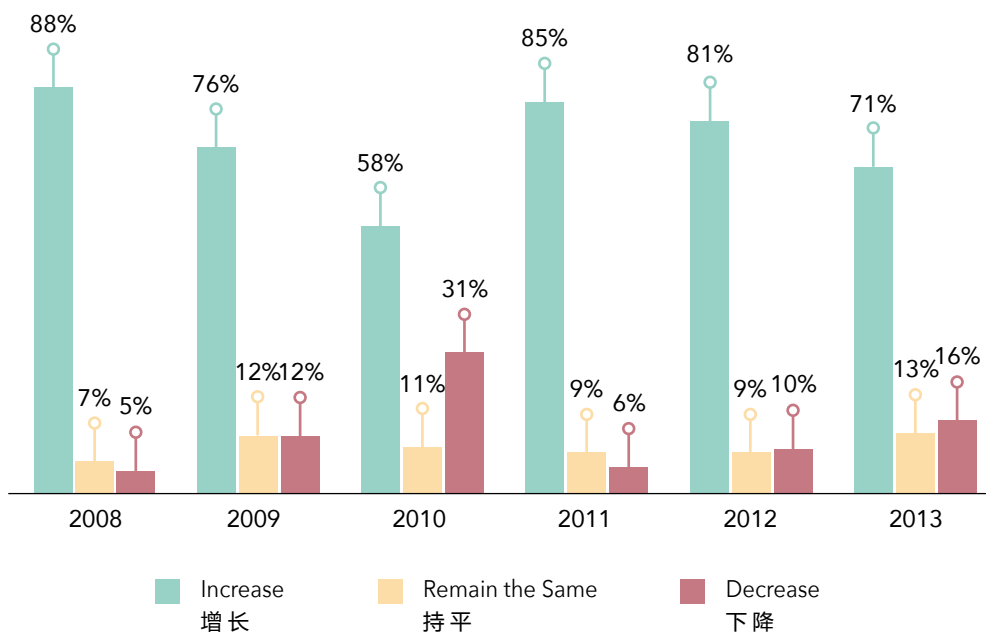
尽管面临上述挑战，绝大多数受访者对企业未来两年在华运营前景表示乐观。与此同时，越来越多的会员企业也开始瞄准中国飞速成长的消费市场和商业市场（相对于从事中国制造产品出口）。今年，70%的受访者表示他们的主要目标是在中国生产或采购商品供应中国市场。

在关注上述变化的前提下，我们将继续呼吁有利于推动市场竞争和开放的政策，从而实现帮助会员企业取得商业成功、协助中国打造普遍惠及内外资企业的商务环境的目标。

Greg Gilligan 葛国瑞
Chairman, AmCham China 中国美国商会主席

Revenue Growth Is Slowing 企业收入增长减缓

Q How do the 2012 revenue from your China operations compare to the previous year? | 企业 2012 年在华的运营收入与前一年的比较



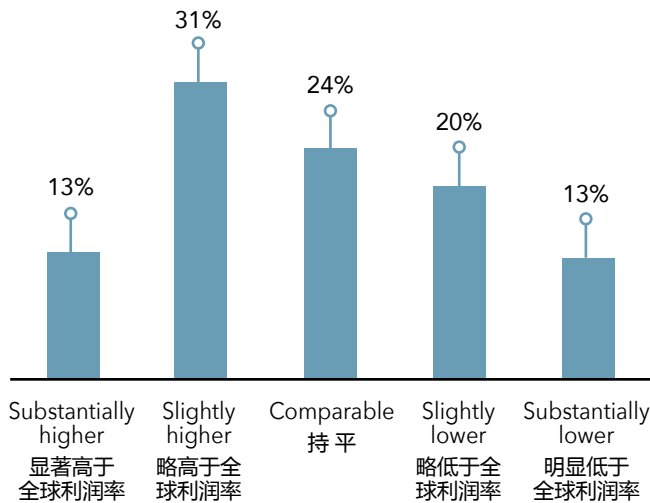
In the wake of the global financial crisis the 2011 Business Climate Survey captured growth in optimism about business operations in China. Since then, the outlook has gradually tempered as the economy has slowed and in many areas begun to rebalance. This is visible in respondents' year-on-year comparisons of revenue. Since 2011, respondents who experienced an increase in revenue of China operations decreased from 85 percent to 71 percent.

正当全球金融危机刚刚过去之时，2011 年商务环境调查显示，受访者对在华商业运营乐观程度上升。自此之后，随着经济放缓，很多领域开始调整，上述乐观预期逐渐减缓。这一点在受访者年度收入对比中表现明显。自 2011 年起，在华运营收入实现增长的受访者比例从 85% 下降至 71%。

China Profit Margins Remain High 企业在华仍保持高利润率

Q How do the 2012 operating margins of your China operations compare to your company's worldwide operating margins?

2012 年企业在华利润率与其全球利润率的比较



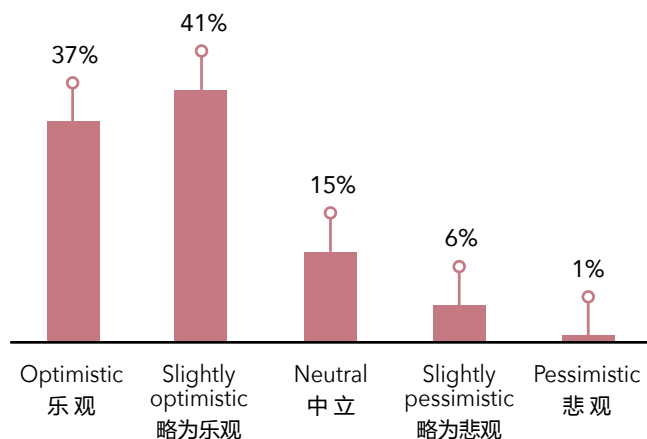
Despite experiencing declining revenue growth rates, China still remains a profitable environment compared to other economies. Over 40 percent of survey respondents say operating margins in China are better than the global average for their company. This is largely unchanged from the previous year, showing that the operating environment still compares favorably to the rest of the world.

尽管企业收入增长率下降，但与其他经济体相比，中国依然提供了一个盈利环境。超过 40% 的受访者表示在华运营利润率依然高于企业的全球平均利润率。这一数据与去年基本保持一致，说明与全球其他经济体相比，中国的商业运营环境仍然良好。

Two-year Outlook Is Optimistic 未来两年前景乐观

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

企业对其未来两年在华商业前景的预期

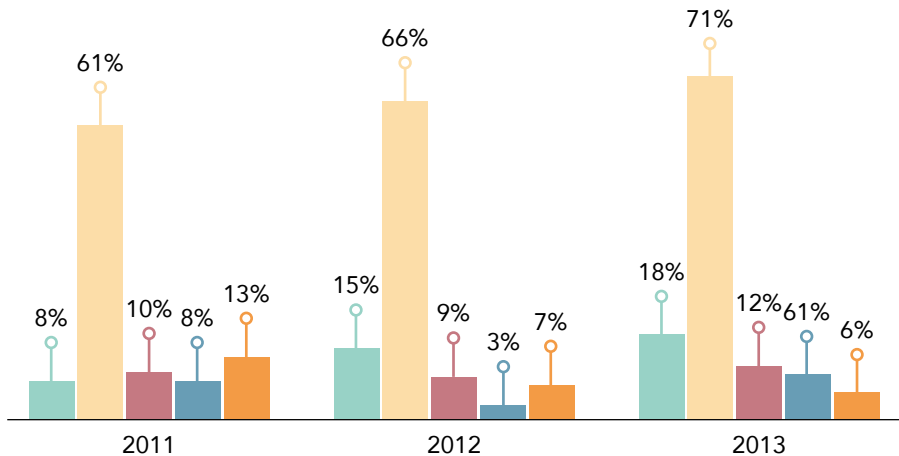


The continued competitiveness of China-based operations is mirrored in the sustained optimism shown by survey respondents. This year respondents were slightly less optimistic in their two-year business outlook, but the overall outlook among respondents remains positive. Over 70 percent reported having an "optimistic" or "slightly optimistic" outlook.

调查受访者对企业在华运营前景持续表示乐观，这反映了企业在中国运营的持续竞争力。今年的受访者对未来两年的运营前景乐观程度稍有下降，但受访者整体对在华运营前景依旧保持乐观。超过 70% 的受访者对运营前景持“乐观”或“略为乐观”的态度。

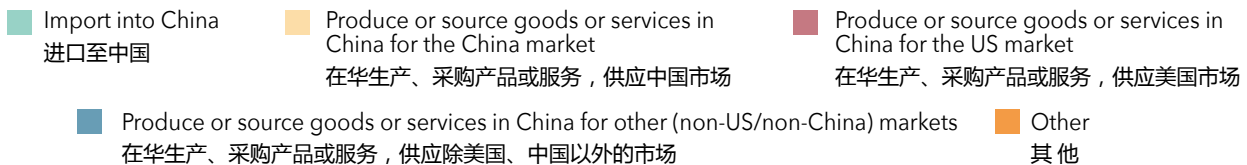
More Respondents Cite Goal to Sell to China Market 把中国市场作为营销目的地的企业增加

Q What are your company's primary goals and strategies in China? | 企业在华的首要目标和战略



Survey respondents are highly oriented towards selling into the Chinese market, as opposed to exporting. The percentage of respondents who said their company's goal is to "produce or source goods or services in China for the China market" rose again this year, to over 70 percent.

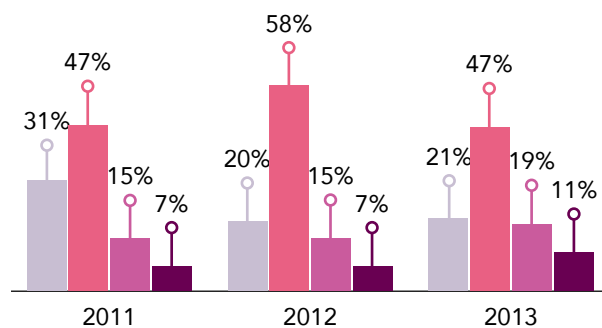
调查受访者在华经营的产品和服务主要在中国市场销售,而非出口。今年,受访企业表示企业目标是“在华生产、采购产品或服务,供应中国市场”的比例再次上升,超过了70%。



Fewer Name China as Top Global Investment Priority

把中国作为全球首选投资目的地的企业减少

Q 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

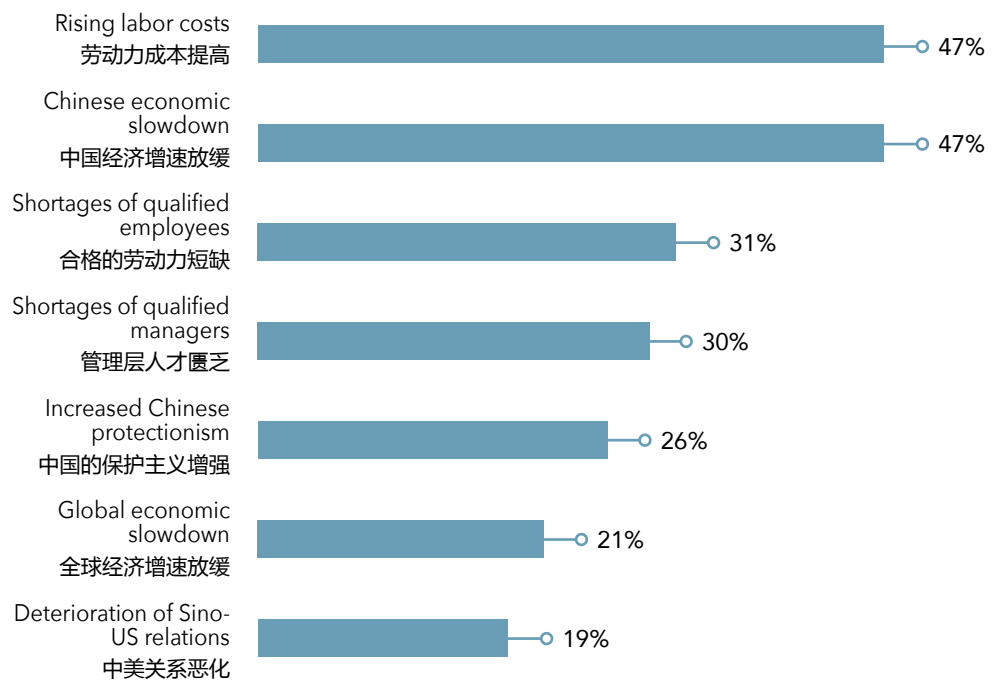


Not all business indicators remained as positive. China's ranking in global investment plans slipped slightly compared to last year. The percentage of respondents that listed China among their "top-three priority" markets declined 11 percentage points this year. The proportion of those who listed China as being "one among many FDI destinations" and "not a high priority" rose. However, 68 percent of respondents still ranked China at or above their top-three investment priorities.

并非所有商务指标都为正值。与去年相比,今年中国在企业近期全球投资计划中的排名略有下滑。今年受访者中将中国市场列为“排名前三”的比例较去年下降11个百分点。将中国列为“众多直接投资地之一”和“非投资重点”的比例有所上升。但是,68%的受访者依然将中国列为“排名首位”或“排名前三”的投资地。

Rising Labor Costs, Economy Top Business Risks 不断增长的劳动力成本和经济放缓成为最大的商业风险

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



For the first time “labor costs” were the top ranked risk faced by surveyed companies, and shortages of qualified employees and managers ranked third and fourth, highlighting the tightening labor market. It should also be noted that “Chinese economic slowdown” remained a leading concern, while “global economic slowdown” declined in importance to pre-global financial crisis levels.

“劳动力成本”第一次位列调查受访者企业所面临的最大风险之首位，合格劳动力短缺和管理人才匮乏分别名列第三和第四，这一结果充分反映了中国当前劳动力市场的紧张状况。同时，“中国经济增速放缓”依然是一项主要担忧，而与全球金融危机之前相比，对“全球经济增速放缓”的担忧比例有所下降。

Q What are your top ranked business challenges? | 企业面临的主要运营挑战

	2009	2010	2011	2012	2013
1	Management-level human resources constraints 管理层人才匮乏	Inconsistent regulatory interpretation /Unclear laws 法律解释相互矛盾 / 法律不明确	Bureaucracy 官僚主义	Management-level human resources constraints 管理层人才匮乏	NEW Labor Costs* 劳动力成本
2	Inconsistent regulatory interpretation /Unclear laws 法律解释相互矛盾 / 法律不明确	Management-level human resources constraints 管理层人才匮乏	Management-level human resources constraints 管理层人才匮乏	Inconsistent regulatory interpretation /Unclear laws 法律解释相互矛盾 / 法律不明确	Inconsistent regulatory interpretation /Unclear laws 法律解释相互矛盾 / 法律不明确
3	Bureaucracy 官僚主义	Obtaining required licenses 取得许可证困难	Inconsistent regulatory interpretation /Unclear laws 法律解释相互矛盾 / 法律不明确	Non-management level human resources constraints 非管理层人才匮乏	NEW Shortages of qualified employees* 缺乏合格的员工
4	Obtaining required licenses 取得许可证困难	Bureaucracy 官僚主义	Intellectual property rights infringement 知识产权侵权行为	Obtaining required licenses 取得许可证困难	Corruption 腐败
5	National protectionism 国家保护主义	National protectionism 国家保护主义	Corruption 腐败	Corruption 腐败	NEW Shortages of qualified management* 管理层人才匮乏
6	Intellectual property rights infringement 知识产权侵权行为	Corruption 腐败	Obtaining required licenses 取得许可证困难	Bureaucracy 官僚主义	Obtaining required licenses 取得许可证困难

* New survey category | 调查新增类别

Labor issues also ranked high among the specific business challenges that surveyed companies encounter. This year, we broke the general category of labor “constraints” into the more specific categories of labor costs and shortages. Labor costs emerged as the top-ranked challenge, with “shortages of qualified employees” and “shortages of qualified management” ranking third and fifth, respectively. For the second year in a row, “inconsistent regulatory interpretation and unclear laws” was ranked second, reflecting the widespread desire for greater consistency in application of business regulations.

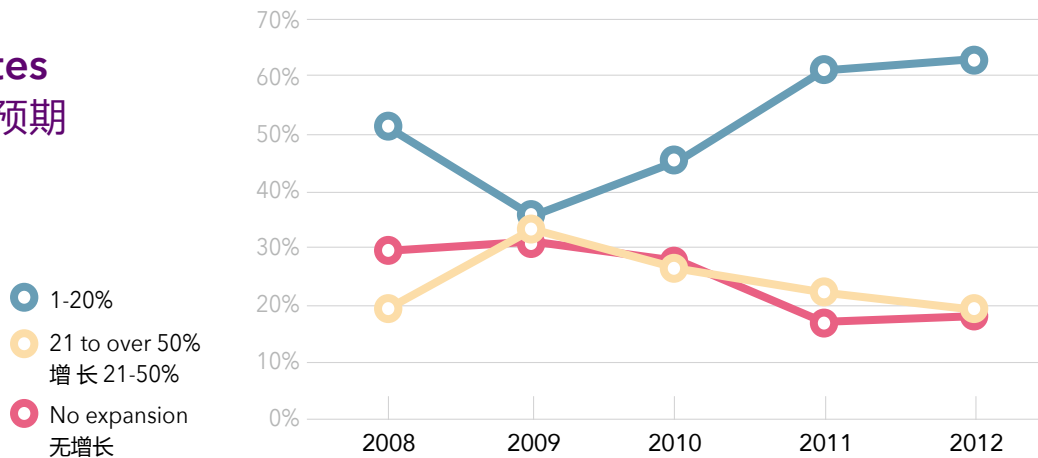
劳动力相关问题仍居调查受访企业在华经营面临的具体商务挑战的前列。今年，我们将之前笼统的“劳动力短缺”分解成为更具体的劳动力成本和劳动力短缺两项。劳动力成本名列具体挑战第一位，“缺乏合格的员工”和“管理层人才匮乏”分列第三和第五。“法律解释相互矛盾 / 法律不明确”连续两年位列第二，充分反映了企业对提高商业监管透明度的普遍需求。

Labor Costs, Shortages Are Top Challenges 劳动力成本与人才匮乏成为企业面临的主要挑战

Expectation of Investment Growth Moderates 企业投资预期增长放缓

Q How much do you estimate your company will increase investment in China operations for the upcoming year?

企业对 2013 年在华运营投资增长的预期

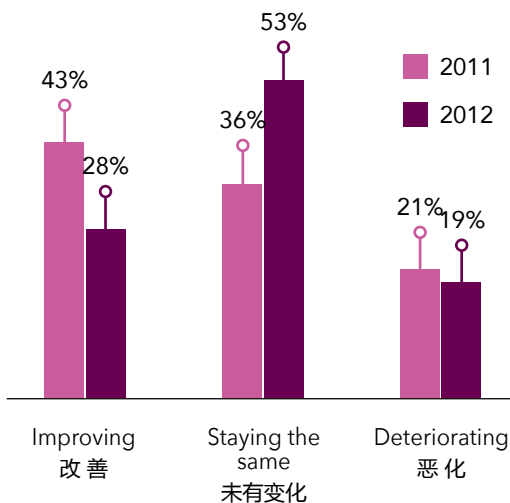


The more moderate pace of investment growth among surveyed companies reflects both the leveling off of China's rapid growth and the fact that many international companies already have a substantial presence in China. Companies have continued to increase investment overall; the percentage of respondents who said they don't expect to expand investment has declined. However, expansion is occurring at a slower pace. The number of those who plan to increase investment in the range of 1 to 20 percent has steadily risen since 2009. Meanwhile, the percent of respondents with ambitious goals to hike investment in the 21 to over 50 percent range has fallen over the same period.

被调查企业在华投资增速进一步放缓，原因一是中国经济高速增长势头放缓，二是很多跨国公司的在华业务都已取得实质性发展。但企业在华投资总额总体呈增长态势，回答“预计不会扩大投资”的比例下降。然而投资增速正在下降。自 2009 年起，受访者中计划增加投资 1%–20% 的数量呈稳步上升态势。但同期，受访者中计划增加投资 21%–50% 的数量则有所下降。

Q The quality of China's investment environment is:

中国投资环境质量



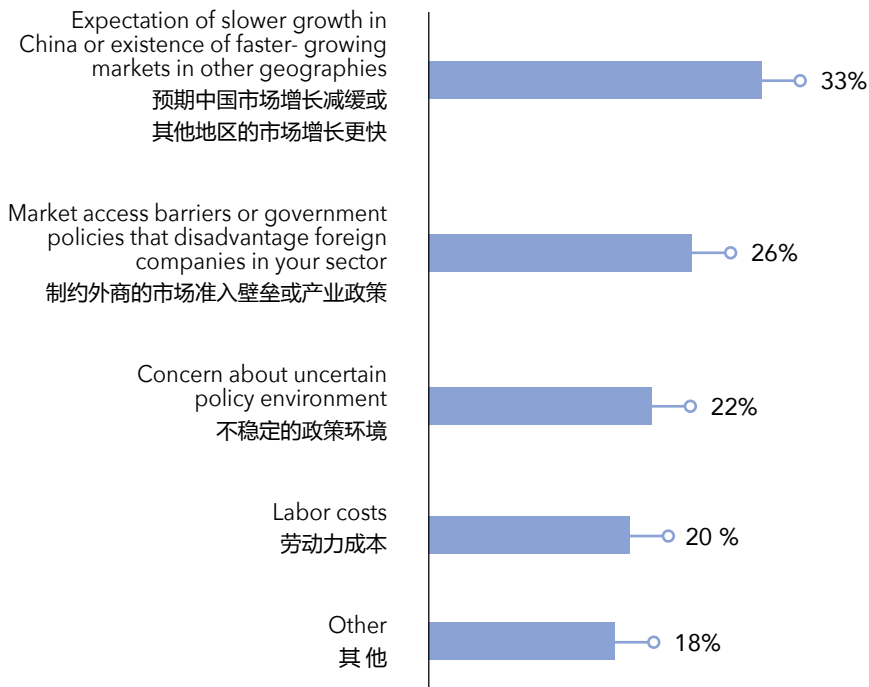
Fewer See Investment Climate Improving 认为投资环境改善的企业减少

An important change revealed in this year's survey was that relatively fewer respondents say they believe China's investment environment is improving. The percentage of those who say the environment is improving dropped from 43 percent a year ago to 28 percent in the latest survey. In the same period, the number of respondents who reported seeing no change in the environment jumped from 36 percent to 53 percent.

今年的调查中显示了一项重要变化，即认为中国投资环境正在改善的受访者比例降低，从一年前调查显示的 43% 下滑至本次调查的 28%。同期受访者中认为中国投资环境没有变化的比例从 36% 跃升为 53%。

Q If you plan to increase investments in China at a slower pace in 2013 than in 2012, are you doing so because of:

企业 2013 年在华投资放缓的原因？



Slowdown, Policy Concerns Weigh on Expansion Plans

企业因经济增长减缓和对政策的担忧而放缓对华投资

On a related note, a number of respondents said their companies are slowing the pace of investment growth in China because of regulatory concerns. “Market access barriers or government policies that disadvantage foreign companies in your sector” and “concerns about uncertain policy environment” ranked second and third as reasons for respondents to slow their rate of investment this year.

The main reason foreign companies are slowing the pace of investment in China is that they anticipate a relative slowdown in its GDP growth relative to other geographies. Against this backdrop of more moderate growth – which is, of course, to be expected as China rebalances its economy – foreign investors are likely to be especially concerned by the prospect of regulatory difficulties. Policy reforms that further open markets and increase regulatory transparency would create a more business-friendly environment that might help to revitalize FDI flows into China.

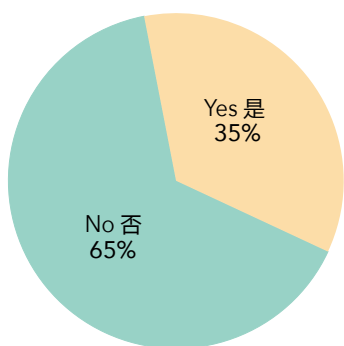
与上一问题相关，不少受访者表示他们的企业计划减缓在华投资速度的原因是基于对监管的担心。“所在行业市场准入壁垒或政府相关政策使外资企业处于不利地位”和“担心政策环境不稳定”成为受访者减缓今年投资速度的第二和第三大原因。

外资企业减缓在华投资速度的主要原因是他们预计与其他国家和地区相比，中国的 GDP 增速相对放缓。中国对经济结构进行调整，其中经济增长预期必然会继续放缓，在此背景下，外资企业也就格外担心监管方面的问题。进行政策改革，进一步开放市场、增加监管透明度将有助于营造商业友好型环境，从而重振对华外国直接投资的势头。

One Third Perceive SOE Favoritism 三分之一的企业认为，产业政策倾向于国有企业

Q Is your company at a comparative disadvantage as a result of industrial policies that favor state-owned enterprises?

企业是否因倾向国有企业的产业政策而处于相对劣势？



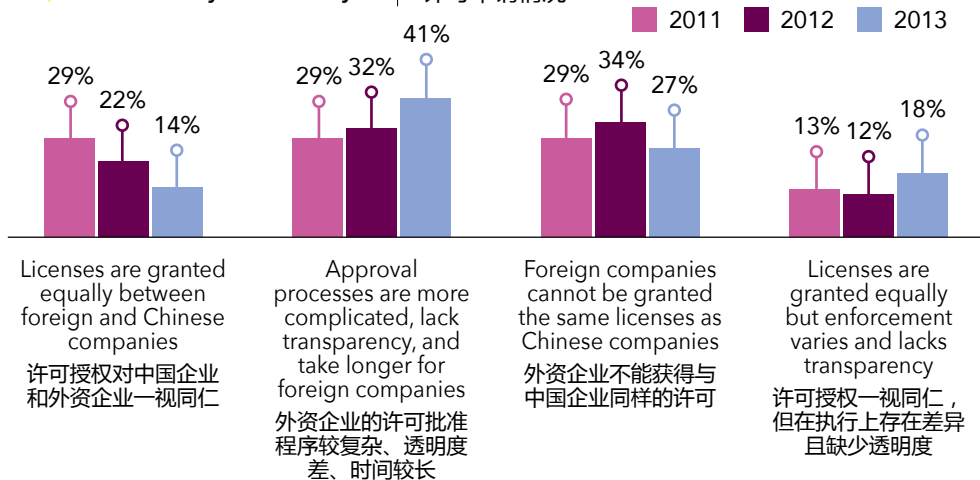
Thirty-five percent of respondents believe industrial policies favor state-owned enterprises (SOE) to the detriment of their own company. When the responses are narrowed to include only those whose companies sell products or services to the Chinese government, 49 percent of those respondents think China's policies work to the advantage of SOEs. Despite the government's moves in recent years to delink industrial policies from government procurement, there is still a strong perception that SOEs enjoy favorable treatment.

有 35% 的受访者认为自己的企业因为向国有企业倾斜的产业政策而遭受不利影响。而在为中国政府提供产品和服务的受访者中，49% 的受访者认为中国的政策有利于国有企业发展。尽管最近几年中国政府采取诸多措施将产业政策与政府采购脱钩，但企业依然普遍认为国有企业享有优惠待遇。

Growing Concerns over Equity in Licensing 更多的企业对许可申请的公平性表示担忧

Q How are license approvals handled in your industry?

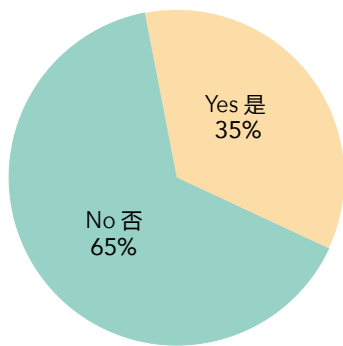
企业所在产业相关许可申请情况



One kind of market access barrier many companies encounter is difficulty obtaining business licenses – in fact, survey results suggest it is seen as a growing problem. Between 2011 and 2013, the percentage of respondents who think “licenses are granted equally between foreign and Chinese companies” fell from 29 percent to 14 percent. At the same time, the percentage of respondents who believe “approval processes are more complicated, lack transparency, and take longer for foreign companies” rose from 29 percent to 41 percent. Also, this year saw a rise in the number of respondents who said licenses are granted equally, but enforcement is inconsistent between foreign and domestic companies.

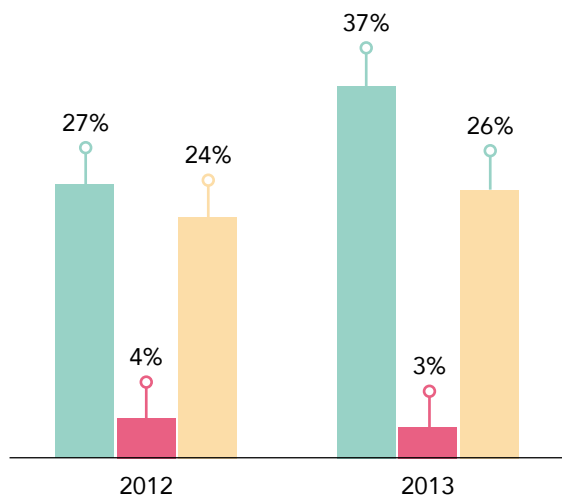
许多企业可能遇到的市场准入壁垒之一便是申请获得营业执照难度大——事实上，调查结果显示这一问题正变得日益严重。2011–2013 年间，认为“获得许可时对外资企业和中国企业一视同仁”的受访者比例从 29% 下降至 14%。与此同时，受访者中认为“外资企业许可审批程序较复杂，透明度较差，时间较长”的比例则从 29% 跃升至 41%。另外，今年的调查中，认为“获得许可时对中国企业和外资企业一视同仁，但执行上存在差异且缺乏透明度”的受访者人数有所上升。

Q Is de facto technology transfer as a requirement for market access in China a concern for you?
是否担忧中国在实际中以市场准入为条件要求企业进行技术转让？



Q Do you feel de facto technology transfer as a requirement for market access in China is:
您实际中感到中国国内以市场准入为条件要求企业进行技术转让的情况

■ Increasing 不断增加
■ Decreasing 不断减少
■ Staying the same 没有变化



Perception of Growing Pressure for Technology Transfer 企业感到强制技术转让的压力增大

This year's survey revealed that 35 percent of respondents are still concerned about de facto technology transfer as a requirement for market access. When narrowed to respondents in advanced technology sectors (including aerospace, automotive, chemical, and information technology), this rises to 42 percent. A similar question last year found that a third of respondents viewed de facto technology transfer requirements as negatively impacting the business environment in China.

今年的调查报告显示 35% 的受访者依然担心事实上的技术转让成为市场准入的前提。而在高科技行业（包括航空、汽车、化工和信息技术）受访者中，这一比例则上升至 42%。去年调查中也设计了一个类似问题，结果显示 1/3 的受访者认为事实上的技术转让要求给中国的营商环境带来了负面影响。

Members perceive there is growing pressure for technology transfer. The percentage of respondents who say de facto requirements for technology transfer are increasing rose from 27 percent last year to 37 percent this year. Intellectual property is an essential component of any company's pursuit of innovation, and now over a third of respondents are concerned about having to decide between transferring their intellectual property and being excluded from the Chinese market.

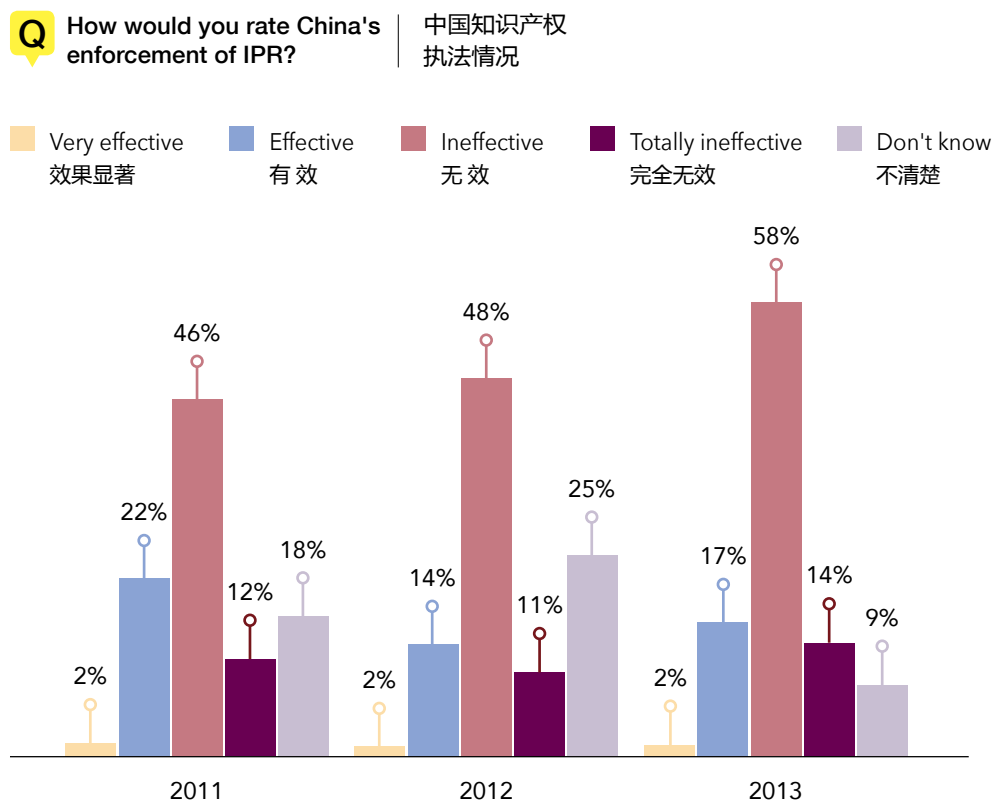
会员企业认为所面临的技术转让压力不断增大。与去年相比，今年的受访者中认为实践中技术转让要求不断增加的比例从去年的 27% 上升至今年的 37%。知识产权是企业创新的重要组成部分，而目前有超过 1/3 的受访者担心不得不在知识产权转让和无法进入中国市场之间选择其一。

Intellectual Property Rights 知识产权

Growing Number Say IPR Enforcement Ineffective 更多企业表示知识产权保护执法不力

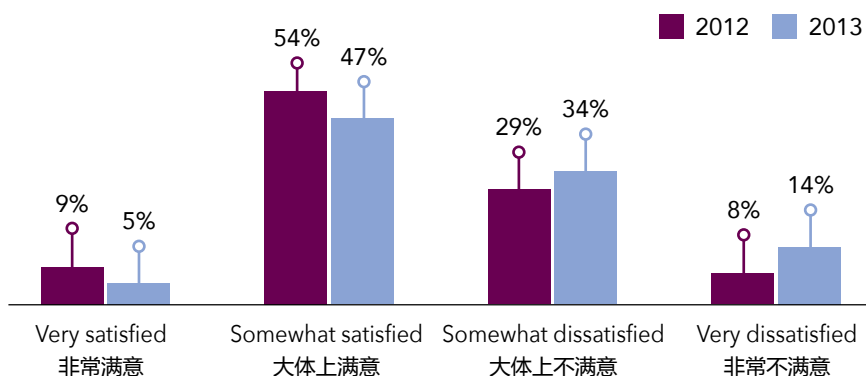
Respondents also reported growing concerns related to enforcement and protection of intellectual property rights. For the third straight year in a row, the survey data reflected an increase in the percentage of respondents who listed China's enforcement of IPR as ineffective. While there was a slight increase in those who rated it as "effective," there was an even bigger rise in the percentage that classified it as "ineffective" and "totally ineffective." The Chinese government has made substantial efforts to improve its IPR regime, but respondents generally still do not consider enforcement to be effective.

调查报告显示，受访者对知识产权执法和保护的担心也日益加剧。连续三年的调查数据显示，受访者认为中国知识产权执法无效的比例逐年上升。尽管认为“有效”的受访者比例也有略微增加，但认为“无效”和“完全无效”的人数比例增幅更大。中国政府在完善知识产权制度方面已经做了大量的工作，但受访者依然普遍认为知识产权执法难见成效。



Q If you have brought any infringements to court, how satisfied were you with the actions of the Chinese courts?

企业将侵权行为诉诸法律时对中国法院执法情况的满意程度

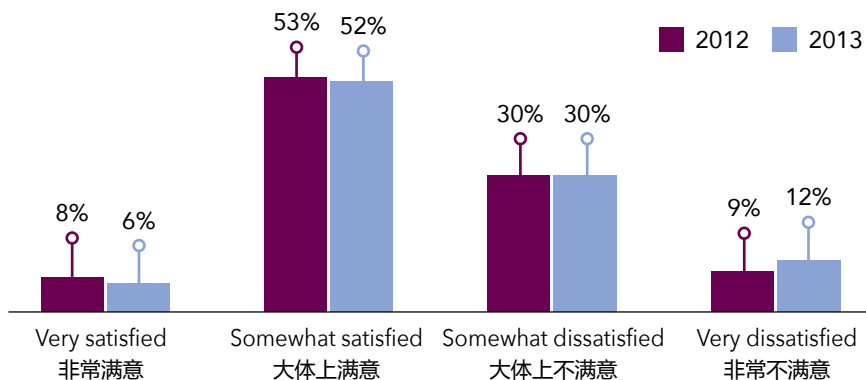


Of respondents who had brought IPR infringement cases to court, relatively fewer reported being satisfied with the results – 52 percent this year, compared to 63 percent a year ago. This reversed the gains seen in satisfaction levels in last year's survey. Satisfaction with the administrative process remained more closely in line with last year's results. Those "very satisfied" and "somewhat satisfied" accounted for 58 percent of the respondents. While respondents are still more likely to be satisfied than not with both judicial and administrative procedures, there were no positive changes in perception of the IPR environment. This comes over a year after China institutionalized its 2011 special IPR campaign by creating an IPR office within the office of the State Council. While the campaign was well received by industry, such efforts have not yet factored into a more positive assessment of China's IPR landscape.

在曾将知识产权侵权案件诉诸法院的受访者中，对法院判决结果表示满意的比例比去年稍有下降，去年 63%，今年 52%。这也抹去了去年调查报告中显示的满意度水平的上升。对知识产权行政程序的满意度比例与去年较为接近。选择“非常满意”和“比较满意”的受访者占总受访人数的 58%。尽管受访者倾向于对知识产权司法和行政程序表示满意，但对知识产权环境的看法却没有显著改观。2011 年中国开展了知识产权专项执法活动，并在之后在国务院办公厅内成立了知识产权办公室。尽管此项专项活动受到了业内的广泛好评，但仍未能转变受访企业对中国知识产权整体环境的看法。

Q If you have taken administrative action, how satisfied were you with the actions of the relevant Chinese officials?

企业通过行政诉讼打击侵权行为时对中国政府官员工作情况的满意程度



Most Report Satisfaction on IPR Legal Remedies

大多数企业对知识产权侵害案件的法律补偿表示满意

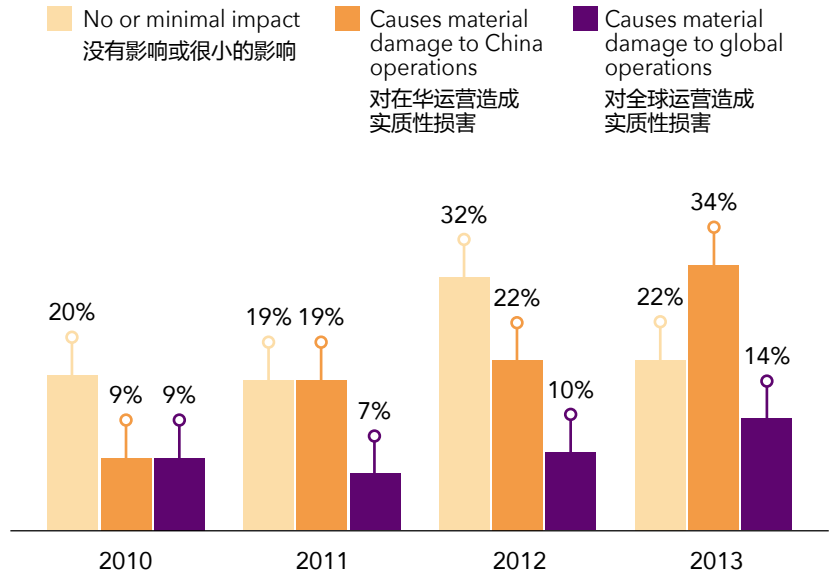
More Say IPR Theft Causes Significant Damage 由于知识产权侵害而受到实质性损害的企业有所增加

One stark difference in the IPR-related survey questions this year is that a growing number of respondents report China IPR infringements cause material damage to their company operations. The number of those who said IPR theft causes material damage to China operations rose over 10 percentage points, to 34 percent. The percentage of those who reported material damage to global operations also rose by 4 percentage points, to 14 percent.

今年的调查中知识产权相关问题的一个显著变化是越来越多的受访者声称中国的知识产权侵权行为对自己公司的运营造成实质性损害。选择知识产权侵权行为导致实质性损害的受访者比例为34%，比去年增长了10多个百分点。认为对全球运营造成实质性损害的受访者比例为14%，比去年增长了4个百分点。

Q 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结果

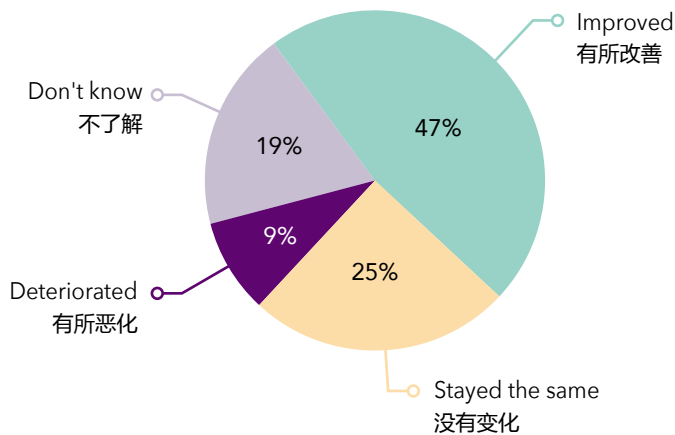


Long-term Trend in IPR Positive

知识产权保护长期发展前景乐观

Q In the last five years, China's enforcement of IPR has:

过去五年中国知识产权的执法情况



Despite more negative perspectives when asked about year-on-year changes, respondents have a more positive view of how China's IPR enforcement has evolved over time. Almost half view it as having improved over the past five years.

尽管受访者认为中国知识产权执法状况与上一年相比有所恶化，但受访者也认为总体而言中国的知识产权执法呈进步态势。近一半的受访者认为过去五年来中国知识产权执法不断改善。

Internet & Cybersecurity

互联网与网络安全

Over the past two years, the Business Climate Survey has added a number of new questions about Internet usage and cyber security in order to capture data on how these issues impact the business community.

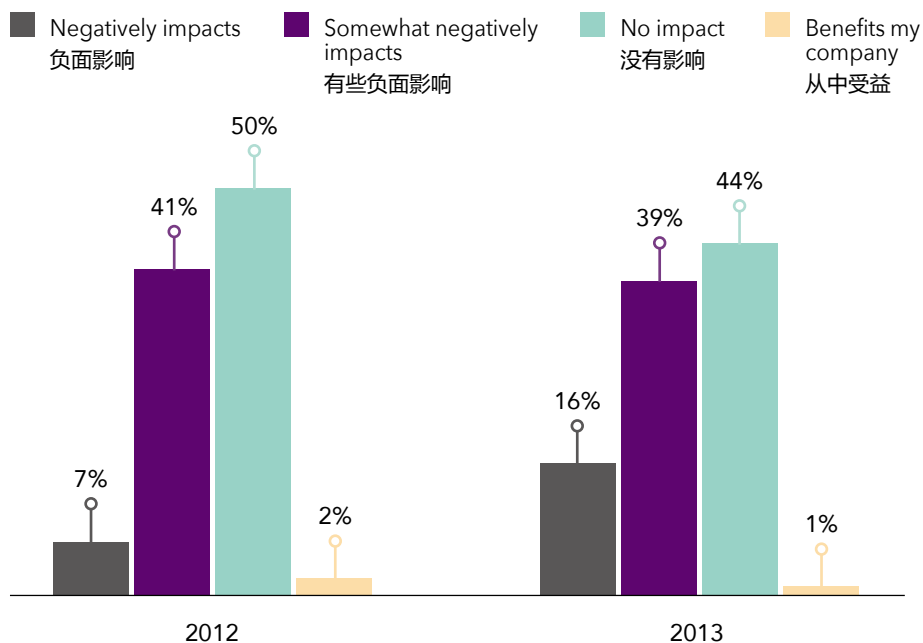
两年来，营商环境调查中新增了一些有关互联网使用和网络安全的问题，目的在于了解互联网和网络安全对商界的影响。

Over Half Cite Online Censorship as Business Impediment

过半企业表示网络审查阻碍业务运营

Q To what degree does Internet censorship of content 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

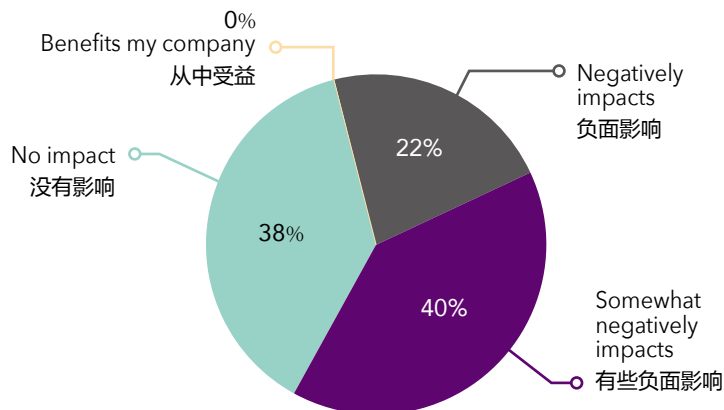


In the most recent survey, the percentage of respondents who said Internet censorship "negatively impacts" their company's ability to conduct business in China more than doubled, from 7 percent to 16 percent. The total number of respondents who see censorship to some degree hurting their business rose to more than 50 percent this year.

最新的调查结果显示，受访者中认为互联网审查对自己企业在华运营能力构成负面影响的比例增长了一倍多，从7%上升至16%。认为互联网审查在一定程度上阻碍了企业运营的受访者比例增加到50%以上。

Q To what degree does the blocking of Internet search engines impact your company's ability to conduct business normally in China?

搜索引擎网站的封锁对企业正常运营产生的影响



A combined 62 percent of respondents report that blocking of search engines makes it more difficult to conduct business. In a global economy increasingly reliant on communication, censorship makes it cumbersome to retrieve real-time market information, share time-sensitive data, and communicate with business and research colleagues in other countries.

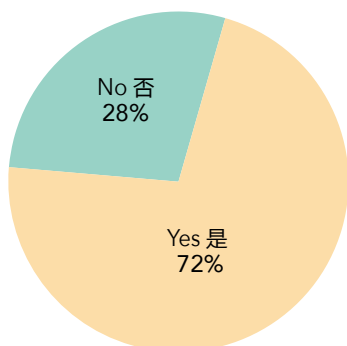
62% 的受访者表示，搜索引擎网站的封锁使企业运营更加困难。在全球经济对通讯的依赖度日益加深的背景下，互联网审查给企业实时检索市场信息、分享时效性数据以及与其他国家的商业和研究伙伴沟通交流造成困难。

Blocked Searches, Slow Internet Hamper Business

限制搜索结果和互联网网速缓慢阻碍了企业运营

Q 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运营的效率



For the second year in a row, almost three-quarters of respondents said slow or unstable Internet access is an impediment to doing business in China. China's Internet management policy causes delayed movement of traffic across China's borders (even for non-censored websites), compromising the ability of businesses to readily access offshore data and information.

连续两年，有近 3/4 的受访者表示网速慢、网络连接不稳定对企业运营造成负面影响。中国的互联网管理政策降低了中国与境外在线数据交换的速度（即使是不受审查的网站亦如此），影响了企业连接获取海外数据和信息的能力。

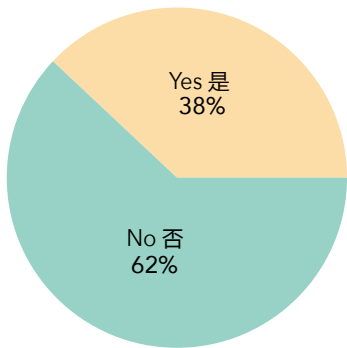


More Consider Shift to Cloud 更多的企业考虑转向云计算



Is your company shifting resources or services to the cloud?

是否正在向云计算
转移资源或服务



Such challenges are only growing more important as businesses increasingly utilize advanced information technology services, including cloud computing. Thirty-eight percent of respondents say they are shifting resources or services to cloud computing, up from 31 percent last year.

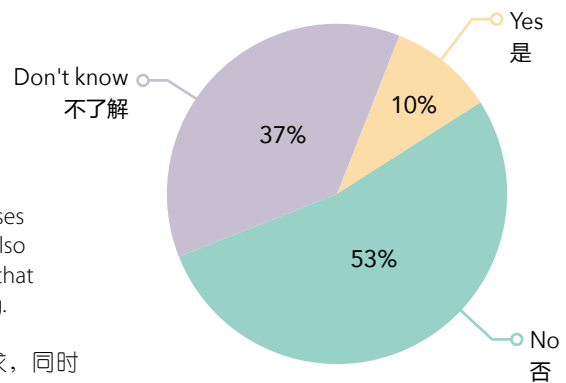
随着企业越来越多地使用包括云计算在内的先进信息技术服务，上述问题更加突出。38%的受访者表示他们计划将资源或服务转移至云计算，而去年的这一数据是31%。

China-based Cloud Computing Faces Doubts 中国云计算面临疑惑



Would you consider using China-based cloud computing?

是否考虑使用中国的云计算技术



The move towards cloud computing services not only raises questions about Internet reliability and accessibility, but also about data security. Only 10 percent of respondents said that they would consider using China-based cloud computing.

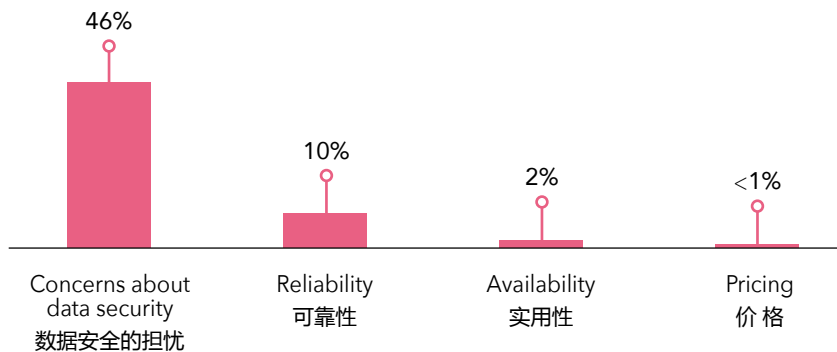
云计算服务趋势不但对互联网稳定性和连接度有要求，同时还对数据安全提出了要求。只有10%的受访者表示他们会考虑使用中国云计算。

Most Cite Security Worries on China Data Storage

大多数企业对中国数据存储安全表示担忧

Q If you would not consider using China-based cloud computing, is the reason due to:

不考虑使用中国云计算服务的原因



The overwhelming reason respondents do not want to use China-based cloud services is that they are concerned about data security.

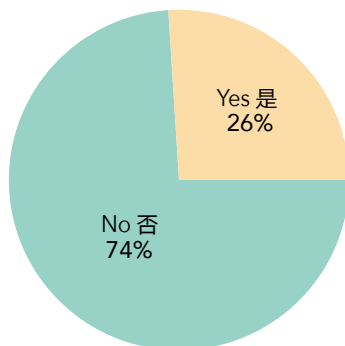
受访者不准备使用中国云计算服务的最大原因是担心数据安全问题。

One in Five Report Data Theft

二成的企业表示遭受过数据遗失

Q Have proprietary data or trade secrets from your China operations been breached or stolen?

运营数据或贸易保密信息在中国是否出现过破坏或遗失的现象？



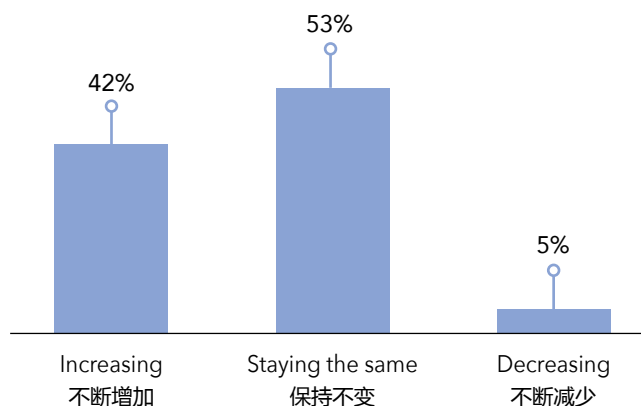
The concerns over data security are not just theoretical. Over a quarter of respondents say they have experienced the breach or theft of data and/or trade secrets from their China operations. This poses a substantial obstacle for businesses in China, especially when considered alongside the concerns over IPR enforcement and de facto technology transfer requirements.

对数据安全的担心并非仅存在于理论上。超过 1/4 的受访者表示他们在华运营的数据和 / 或贸易保密信息曾被破坏或窃取。这对企业在华运营造成了严重的阻碍，特别是再加上对知识产权执法和技术转让的事实要求的担心。

Few See Positive Trend in Data Security 数据安全前景堪忧

Q 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



Over 40 percent of respondents say the risk of a data breach is actually increasing. Within the business community, the widespread perception that the risk of hacking is either rising or staying the same (i.e., not decreasing) does not bode well for the development of cloud computing in China.

超过 40% 的受访者认为数据受到破坏的风险呈增加态势。商业界普遍认为数据被侵的风险增加或持平（即不会减小）对中国云计算的发展造构成了威胁。



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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

Headquartered in Beijing with Chapters
in Tianjin, Central China (Wuhan),
Northeast China (Dalian)

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

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