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目录

Contest

前言

一、研究背景和意义

当前，世界处于百年未有之大变局，国际格局加速演变，国际形势中不稳定不确定因素持续上升，全球贸易摩擦升级，保护主义、单边主义加剧，多边主义和自由贸易体制受到冲击，地缘政治不稳定和经济运行风险依然突出；中国正处于经济新旧动能转换关键期和转变发展方式、优化经济结构的攻关期，企业营商环境正发生快速变化。2019年前三季度，中国经济继续运行在合理区间，延续了总体平稳、稳中有进发展态势，稳定性、韧性明显增强，发展质量和效益继续提高，经济迈向高质量发展的步伐更加稳健。但与此同时，国内长期存在的结构性、体制性矛盾的解决需要一个过程，经济运行面临着新的下行压力，实体经济困难仍然较多，民生领域还有不少短板；尤其是今年下半年以来中美贸易摩擦愈演愈烈，对中国经济增长带来了前所未有的压力与挑战，第三季度数据显示，中国 GDP 增速下滑至 6%。继续全面深化改革，持续优化营商环境，努力实现经济高质量发展，仍然是中国当前和今后一段时间面临的一项重要工作任务。

党中央、国务院对营商环境建设对营造国际一流的市场化、法治化、国际化营商环境作出了一系列重要指示，提出了更高要求。习近平总书记在第二届“一带一路”国际合作高峰论坛记者会上的讲话中指出，要“按照扩大开放的需要修改完善法律法规，在行政许可、市场监管等方面规范各级政府行为，清理废除妨碍公平竞争、扭曲市场的不合理规定、补贴和做法，公平对待所有企业和经营者，完善市场化、法治化、便利化的营商环境”；习近平总书记在向 2019 年中国国际服务贸易交易会致贺信时强调，中国将致力于促进更高水平对外开放，坚定支持多边贸易体制，在更广领域扩大外资市场准入，积极打造一流营商环境。李克强总理在博鳌亚洲论坛 2019 年年会开幕式主旨演讲中强调，“营商环境就是生产力、就是竞争力”，中国将继续下好优化营商环境这个“先手棋”；在全国深化“放管服”改革优化营商环境电视电话会议上，李克强总理再次指出，要把“放管服”改革、优化营商环境作为促进“六稳”的重要举措，打造市场化、法治化、国际化营商环境，更大激发市场主体活力、增强竞争力、释放国内市场巨大潜力。这些重要指示既对我国进一步优化营商环境提出了更高的要求，也为营商环境建设指明了方向。

Foreword

I.Research Background and Significance

Today, the world is witnessing major changes that have not been seen over the past century, rapid evolution of the international landscape, continuous rise of instabilities and uncertainties in the international situation, escalation of global trade frictions, aggravation of protectionism and unilateralism, impacted multilateralism and free trade system, and still prominent geopolitical instability and economic operation risks; China is in a critical period of replacement of old economic growth drivers with new ones and a crucial period of changing its mode of development, optimizing the economic structure and transforming growth drivers, when the business environment facing enterprises is undergoing rapid changes. In the first three quarters of 2019, China’s economy continued to run within a reasonable run, maintained generally stable development with some progress, with its stability and resilience growing noticeably and development quality and efficiency improving continuously, and moved towards high-quality development at a steadier pace. At the same time, however, it takes time to solve the long-standing structural and system-related contradictions in China, which is faced with new economic downturn pressure, still many difficulties in the real economy and quite a few weak links in areas with regard to people’s livelihood. Therefore, it remains an important mission of China at present and for some time to come to continue to comprehensively deepening reform, further open the market, actively expand exports, continuously make it easier to do business and endeavor to maintain high-quality economic development.

The CPC Central Committee and the State Council have given a series of important instructions and posed higher requirements on the construction of a sound business environment and the building of a world-class, market-oriented and international business environment governed by the rule of law. In his speech at the press conference of the Second Belt and Road Forum for International Cooperation (BRF) in April 2019, General Secretary Xi Jinping pointed out that China should “revise and perfect laws and regulations according to the requirements of expanding opening-up, regulate the behaviors of governments at all levels in administrative licensing, market supervision and other aspects, clear away and abolish unreasonable provisions, subsidies and practices that preclude fair competition and distort the market, have all enterprises and operators equally treated and create a market-oriented and international business environment governed by a sound legal framework”; in the Letter of Congratulations to 2019 China International Fair for Trade in Services (CIFTIS) in May, Xi stressed that China would be committed to promoting higher-level opening-up, firmly supporting the multilateral trade system, expand market access for foreign capital in a wider range of areas and actively create a first-class business environment. In his keynote speech at the opening ceremony of Boao Forum for Asia Annual Conference 2019 in March, Premier Li Keqiang underlined that “A sound business environment enhances productivity and competitiveness” and China would intensify proactive efforts to improve the business environment; at the national picturephone meeting on deepening the reform of streamlining administration, delegating power and improving government services and optimizing the business environment in June, Li stated again that China should give full play to the role of the two key measures in promoting “stabilization of six aspects”, build a market-oriented and international business environment governed by the rule of law, further motivate market players, increase their competitiveness and release the huge potential of the domestic market. Whilst raising higher requirements for further optimizing the business environment in China, these important instructions have indicated the direction for business environment construction.

2019 年以来，各地区、各部门按照党中央、国务院的统一部署，深化“放管服”改革，大力优化营商环境，推动了中国经济社会的快速发展，第三产业、新兴产业出现了迅猛增长势头。国家统计局最新数据显示，2019 年前三季度，中国国内生产总值（GDP）69.78 万亿元，同比增长 6.2%；全国固定资产投资同比增长 5.4%；第三产业增加值占国内生产总值的比重为 54.02%，比上年同期提高 0.6 个百分点，比第二产业高 14.2 个百分点；第三产业增长对国内生产总值增长的贡献率为60.6%，高于第二产业24.3 个百分点；规模以上工业中，战略性新兴产业和高技术产业保持快速增长，高技术制造业增加值同比增长 12.6%，增速比全部投资快 7.2 个百分点；高技术服务业投资增长 13.8%，增速比全部投资快 8.4 个百分点。最终消费支出增长对经济增长的贡献率为 60.5%。技术进步、劳动者素质提高、管理创新等贡献在增大，创新创业创造向纵深拓展，前 8 个月日均新登记企业达 1.9 万多户。

但与此同时，我们也要清醒地看到，深化“放管服”改革、转变政府职能、进一步优化营商环境还要付出艰苦努力，与高质量经济发展要求、与国际先进水平相比仍有较大差距，提高国际竞争力，营造国际一流市场化、法治化、国际化营商环境仍然任重道远。

为落实党中央、国务院的战略部署，充分发挥贸促系统的资源优势，放大自身功能作用，密切跟踪、分析研究中国营商环境变化状况，全面客观反映中国优化营商环境取得的成就和企业面临的问题，助力国际一流营商环境建设，激发市场活力和社会创造力，中国国际贸易促进委员会贸易投资促进部（以下简称“促进部”）、贸促会研究院（以下简称“研究院”）自 2016 年起在连续三年开展中国投资（营商）环境调查、发布年度报告基础上，2019 年度继续开展中国营商环境调查及研究报告的编制和发布工作。

二、研究方法

本课题研究综合运用问卷调查、实地调研、企业座谈、对比分析及文献分析等方法。

（一）问卷调查

2019 年 4-6 月，中国贸促会促进部与研究院联合 29 个地方贸促会、多个行业分会及中国贸促会自贸试验区服务中心，组织开展 2019 年度中国营商环境企业问卷调查工作，共回收问卷 5400 余份，其中，4700 家企业有效完成了问卷内容的填写，问卷合格率达到 87.04%；广西、山东、湖北、安徽和北京五省市区回收问卷数量均超 300 份。通过企业问卷调查，我们获取了不同地区、行业及所有制企业的相关数据，为中国营商环境分析研究奠定了良好基础。

Since this year, local governments and authorities have deepened the reform of streamlining administration, delegating powers and improving government services and vigorously optimized the business environment in the light of the unified deployment made by the CPC Central Committee and the State Council, resulting in rapid economic and social development and momentum of robust growth of the tertiary and emerging industries. As indicated by the latest data from National Bureau of Statistics of China, during the first three quarters of 2019, China's gross domestic product (GDP) registered RMB 69.78 trillion, a year-on-year increase of 6.2%; fixed-asset investment increased by 5.4% year on year nationwide; the share of value added in the tertiary industry in GDP reached 54.02%, a 0.6% increase over a year ago and 14.2% higher than that in the secondary industry; growth of the tertiary industry contributed 60.6% to GDP growth, 24.3% higher than the secondary industry; of industries above designated size, strategic emerging industries and high-tech industries maintained rapid growth, with value added in high-tech manufacturing growing by 12.6% year on year, 7.2% faster than the total investment; investment in high-tech services grew by 13.8%, 8.4% faster than the total investment. Growth of final consumption expenditure contributed 60.5% to economic growth. Technological advances, improvements in labor quality and management innovations are increasing their contributions, and innovation, entrepreneurship and creation are pressing ahead in depth, with the average daily number of newly registered enterprises during the first eight months reaching over 19,000.

Meanwhile, we should have a sober understanding that deepening the reform of streamlining administration, delegating power and improving government services and transforming government functions remain in their infancy, optimizing the business environment still requires arduous efforts, there is a wide gap from the requirements of high-quality economic development and the international advanced level, and there is still a long way to go before China can improve its international competitiveness and build a world-class market-oriented and international business environment governed by the rule of law.

In order to put into practice the strategic deployment of the CPC Central Committee and the State Council, fully exert the resource superiority of the trade promotion system, magnify their own functions and roles, closely follow up, analyze and study changes in China's business environment, comprehensively and objectively reflect China's achievements in optimizing the business environment and problems facing enterprises, facilitate the construction of a world-class business environment and arouse market vitality and social creativity, the Department of Trade and Investment Promotion of CCPIT (CCPIT-DTIP) and Academy of China Council for the Promotion of International Trade (ACCPIT) continue to engage in the survey on China's business environment and the preparation and issuance of relevant research report in 2019 based on surveys on China's investment (business) climate and release of annual reports for four consecutive years since 2016.

II.Methodology

This research employs a combination of methods such as questionnaire survey, field investigation, seminars with enterprises, contrastive analysis and literature analysis.

(1) Questionnaire survey

During April to June 2019, CCPIT-DTIP and ACCPIT, together with 29 local sub-councils, a number of industrial sub-councils and CCPIT Service Centers of Pilot Free Trade Zones, organized a questionnaire survey on China's business environment in 2019 among enterprises, with more than 5,400 questionnaires returned, including 4,700 valid ones, which accounted for 87.04%; over 300 questionnaires were returned from Guangxi, Shandong, Hubei, Anhui and Beijing each and more than 1,000 ones were collected from Guangxi alone. Through the questionnaire survey, we obtained relevant data from different regions, industries and enterprises of different ownerships, laying a favorable foundation for analysis and study of the business environment in China.

（二）实地调研

2019 年 4-9 月，促进部与研究院共同组成调研组分赴广西、山东、四川、云南及江苏等多个省市区调研，实地走访了 20 多个产业园区和 80 余家企业，与四川广安经开区、广安区电子商务产业园、广西南宁经济技术开发区、钦北经济技术开发区、贵港市产业园区及石卡园区、桂林国家高新技术产业开发区、贺州生态产业园、柳州鱼峰区工业园区、防城港经济技术开发区、玉林玉柴工业园区、北海工业园区、北海出口加工区、中泰崇左产业园、百色工业园区、百色新山铝业产业示范园、河池大任产业园区、来宾市工业园区等管理委员会负责人，以及华蓥西部硅谷、四川坤鸿电子科技有限公司、四川省中鼎创科技集团有限公司、玉林冠涛防护设备有限公司、广西华奥汽车制造有限公司、广西洁丰生物科技有限公司、广西惠科精密智能科技有限公司、广西桂福林木业有限公司、广西亚龙铝业有限公司、广西超威鑫锋能源有限公司、柳州得华食品有限公司、广西盛隆冶金有限公司、钦州九联食品有限公司、广西医大仙晟生物制药有限公司、广州软视科技股份有限公司、梧州日新塑料实业有限公司、广西北海玉柴马石油高级润滑油有限公司等企业代表面对面深入访谈交流，从不同角度了解到各地营商环境现状、成就及问题，与企业调查问卷信息相互印证、相互补充，为全面、客观评价中国营商环境奠定了基础。

（三）企业座谈

2018 年 12 月，为了解海南自贸区营商环境，倾听海南内外资企业对海南自贸区营商环境的意见建议，促进部在海口召开海南自贸区营商环境建设座谈会，就海南营商环境开展深入研讨和调研。2019 年 3 月，由中国贸促会、中国欧盟商会共同主办，山东贸促会承办的优化营商环境外资企业座谈会（山东专场）在济南南郊宾馆举行，20 余名中国欧盟商会会员企业代表就欧盟企业在山东营商环境相关问题与有关政府部门进行了现场交流与研讨，课题组成员派员全程参加。

（四）对比分析

我们选取 2018 年中国营商环境相关数据与 2019 年数据进行横向、纵向比较研究，从而获得不同地区、不同行业（传统制造业、高技术产业、资源行业、建筑业、服务业等）及不同性质企业（国有企业、民营企业及中外合资、合作企业、外商独资企业等）之间的动态变化状况，深入了解不同地区、行业和企业之间营商环境的差异与特点、趋势，推广各地优化营商环境经验模式，促进各地互学互鉴、共同提高。

(2) Field investigation

From April through September 2019, CCPIT-DTIP and ACCPIT jointly set up an investigation group and dispatched it to a number of provinces, municipalities and autonomous regions, such as Guangxi, Shandong, Sichuan, Yunnan and Jiangsu, respectively, which visited more than 20 industrial parks and more than 80 enterprises. During the visit, the investigation group had in-depth face-to-face interviews and talks with heads of the management committees of Guang'an Economic and Technological Development Zone and Guang'an E-commerce Industrial Park in Sichuan, Nanning Economic and Technological Development Area, Qinbei Economic and Technological Development Zone, Guigang Industrial Park and Shika Town Industrial Park, Guilin National Hi-tech Industry Development Zone, Hezhou Eco-industrial Park, Liuzhou Yufeng Industrial Park, Fangchenggang Port Economic and Technological Development Zone, Yulin Yuchai Industrial Park, Beihai Industrial Park, Beihai Export Processing Zone, Zhongtai (Chongzuo) Industrial Park, Baise Industrial Park, Baise Xinshan Aluminum Industry Demonstration Park, Hechi Daren Industrial Park and Laibin Industrial Park in Guangxi, and representatives of enterprises such as Huaying "Western Silicon Valley", Sichuan Kunhong Electronics Technology Co., Ltd., Sichuan Zhongding Chuang Technology Group Co., Ltd., Yulin Guantao Protective Equipment Co., Ltd., Guangxi Hope Automobile Co., Ltd., Guangxi Jiefeng Bio-Tech Co., Ltd., Guangxi Huike Precision Intelligence Technology Co., Ltd., Guangxi Guifulin Wood Industry Co., Ltd., Guangxi Yalong Aluminum Co., Ltd., Guangxi Chilwee Xinfeng Energy Co., Ltd., Liuzhou Dehua Food Co., Ltd., Guangxi Shenglong Metallurgical Co., Ltd., Qinzhou Jiulian Food Co., Ltd., Guangxi Medical University Xiansheng Bio-Pharmaceuticals Co., Ltd., Guangxi Soft Video Tech Co., Ltd., Guangxi Wuzhou Rixin Plastics Industrial Co., Ltd, Guangxi Beihai Yuchai-Petronas High Quality Lube Co., Ltd. Yunnan Energy Investment Logistics Co., Ltd.and Jiangsu Sumida Group Co., Ltd. These interviews and talks provided the investigation group with information on the status of business climate, achievements and problems in different regions from different perspectives, corroborating and supplementing the information obtain from the questionnaire survey and laying a foundation for comprehensive and objective evaluation of China's business environment.

(3) Seminars with enterprises

In December 2018, in order to understand the business environment in China (Hainan) Pilot Free Trade Zone (Hainan FTZ) and listen to opinions and suggestions of Chinese and foreign enterprises in Hainan on doing business in Hainan FTZ, CCPIT-DTIP organized a seminar on the construction of the business environment in Hainan FTZ in Haikou, with a view to studying and discussing the business environment in Hainan. In March 2019, the Business Environment Seminar for Foreign-invested Company (Shandong Session) co-hosted by CCPIT and the European Union Chamber of Commerce in China (the European Chamber) and organized by CCPIT Shandong Sub-council was held at Jinan Nanjiao Hotel, where over 20 representatives of member enterprises of the European Chamber had on-the-spot communication and discussion on issues concerning EU enterprises' doing business in Shandong with relevant government departments, in the presence of the research group members.

(4) Contrastive analysis

We selected the data on China's business environment in 2018 and compared it with the data obtained in 2019 horizontally and vertically, so as to know dynamic changes in different regions, industries (traditional manufacturing, hi-tech industry, resources, construction, services, etc.) and enterprises of different natures (state-owned enterprises, private enterprises, Sino-foreign joint venture and cooperative enterprises, wholly foreign-owned enterprises, etc.), and have a deep understanding of business environment differences, characteristics and trends in different regions, industries and enterprises, so as to popularize optimal business environment experience and models and promote mutual learning and common improvement.

（五）文献分析

课题组对国内外文献资料进行了搜集梳理，查阅了世界银行、国家发展改革委、商务部、国家市场监管总局及国家统计局等机构在优化营商环境方面的资料。此外，广西各地市相关机构、山东省贸促会、海南省贸促会及四川省广安市贸促会等也提供了营商环境相关资料。经过广泛搜集、鉴别和梳理、吸取有益素材，进一步丰富了报告内容。

三、评价指标

在参照 2018 年中国贸促会营商环境评价指标体系、借鉴吸收世界银行营商环境评价指标并聘请权威专家对各个指标的规范性及科学性进行进一步研讨和论证基础上，课题组完善了 2019 年度中国营商环境评价指标体系及相应企业调查问卷。经过反复论证分析，我们将营商环境评价指标设计为 12 个一级指标及 51 个二级指标。指标权重分配总体遵循等权重原则，各一级指标按照等权重、二级指标以等权重为主的方式进行设计。

12 个一级指标包括基础设施环境、生活服务环境、政策政务环境、社会信用环境、公平竞争环境、知识产权保护环境、科技创新环境、人力资源环境、金融服务环境、财税服务环境、口岸服务环境以及企业设立和退出环境。

(5) Literature analysis

The research group collected and sorted out domestic and foreign literatures, and referred to materials of such organizations as the World Bank (WB), National Development and Reform Commission (NDRC), Ministry of Commerce, State Administration for Market Regulation and National Bureau of Statistics with regard to optimization of the business environment. Additionally, organizations such as relevant organs at the prefecture level in Guangxi, CCPIT Shandong Sub-council, CCPIT Hainan Sub-council and CCPIT Guang'an Council also offered materials regarding the business environment. By extensively collecting, identifying and sorting out relevant literatures and absorbing useful materials, the research group has further enriched the content of the report.

III.Evaluation Indexes

By referring to CCPIT's business environment evaluation index system in 2018, drawing lessons from and absorbing WB's Doing Business Index System and engaging authoritative experts to further study and demonstrate whether each index is normative and scientific, the research group has perfected the evaluation index system for China's business environment in 2019 and the corresponding questionnaire. After repeated demonstration and analysis, we have designed these evaluation indexes as a system of 12 primary indexes and 51 secondary indexes. Index weight allocation generally follows the equal weight principle, which applies to all primary indexes and most of the secondary indexes.

The 12 primary indexes include infrastructure environment, life services environment, policy and government policy, social credit environment, fair competition environment, intellectual property rights (IPRs) protection environment, technology innovation environment, human resources environment, financial services environment, fiscal and taxation services environment, port services environment and enterprise establishment and exit environment.

表 1　中国营商环境评价指标及其权重设置

一级指标及权重	二级指标及权重
基础设施环境（1/12）	交通运输（1/5）　网络通信（1/5）　环保设施（1/5） 水电气供应（1/5）　城市规划和建设（1/5）
生活服务环境（1/12）	居住条件（0.16）　医疗卫生（0.17）　文体设施（0.16） 教育水平（0.17）　环境保护（0.17）　社会治安（0.17）
政策政务环境（1/12）	政策稳定性（1/7）　政策公平性（1/7） 政策透明度（1/7）　政府服务效率（1/7） 政策执行力度（1/7）　政策协同性（1/7）　官员廉洁程度（1/7）
社会信用环境（1/12）	信用信息公示系统建设（1/4）　失信惩戒、守信奖励机制建设（1/4） 社会信用度（1/4）　征信体系建设（1/4）
公平竞争环境（1/12）	市场监管（1/4）　行政垄断治理（1/4） 政府采购（1/4）　市场准入（1/4）
知识产权保护环境（1/12）	知识产权维权成本（1/5）　知识产权行政执法（1/5） 知识产权司法保护（1/5）　知识产权案件办结率（1/5） 知识产权管理与公共服务（1/5）
科技创新环境（1/12）	研发抵扣政策实施（1/5）　知识产权抵押（1/5） 产学研结合（1/5）　创业孵化服务（1/5）　公共服务平台建设（1/5）
人力资源环境（1/12）	熟练劳动力的可获得性（1/4）　中高层管理人员的可获得性（1/4） 外向型人才的可获得性（1/4）　创新创业人才资源可得性（1/4）
金融服务环境（1/12）	融资便利性（2/5）　融资渠道多元化（2/5）　利润汇出自由度（1/5）
财税服务环境（1/12）	财税执法规范性（1/2）　申退税办理时间（1/2）
口岸服务环境（1/12）	货物通关（1/3）　检验检疫（1/3）　人员出入境（1/3）
企业设立和退出环境（1/12）	土地获取（1/3）　环保手续（1/3）　破产手续办理（1/3）

每个指标取值范围为 1-5 分。为了便于在量化基础上进行定性分析，我们将 4.5 分 -5 分评价为非常满意（优秀），3.5 分 -4.5 分（不含 4.5 分）为较满意，2.5 分 -3.5 分（不含 3.5 分）为一般，1.5 分 -2.5 分（不含 2.5 分）为较差，1.5 分（不含 1.5 分）及以下为很差。

四、受访企业构成

（一）500 人及以下中小企业超过八成

从企业规模看，5263 家完成此项调查的企业中，100 人及以下规模企业 3174 家，占 60.3%；100-500 人 1426 家，占 27.1%；500-2000 人 444 家，占 8.4%；2000 人以上 219 家，占 4.2%。

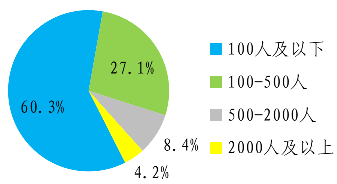

图1 企业规模分布图

Table 1 Evaluation Indexes for China's Business Environment and Their Weights

Primary indexes and their weights	Secondary indexes and their weights
Infrastructure environment(1/12)	Transportation (1/5) Network communications (1/5) Environmental facilities (1/5) Water, electricity and gas supply (1/5) Urban planning and construction (1/5)
Life services environment(1/12)	Living conditions (0.16) Health care (0.17) Recreational and sports facilities (0.16) Education level (0.17) Environmental protection (0.17) Public security (0.17)
Policy and government environment(1/12)	Policy stability (1/7) Policy equity (1/7) Policy transparency (1/7) Government service efficiency (1/7) Policy enforcement (1/7) Policy synergy (1/7) Official integrity (1/7)
Social credit environment(1/12)	Credit information system announcement system construction (1/4) Punishment and reward mechanism construction (1/4) Social credit (1/4) Credit information system construction (1/4)
Fair competition environment(1/12)	Market regulation (1/4) Administrative monopoly management (1/4) Government procurement (1/4) Market access (1/4)
IPRs protection environment(1/12)	IPRs protection cost (1/5) IPRs administrative law enforcement (1/5) IPRs judicial protection (1/5) IPRs case settlement rate (1/5) IPRs management and public services (1/5)
Technology innovation environment(1/12)	Implementation of the R&D tax credit policy (1/5) IPRs mortgage (1/5) Industry-university-research combination (1/5) Business incubation services (1/5) Public service platform construction (1/5)
Human resources environment(1/12)	Availability of skilled labor (1/4) Availability of middle and senior managers (1/4) Availability of foreign services personnel (1/4) Availability of human resources for innovation and entrepreneurship (1/4)
Financial services environment(1/12)	Financing convenience (2/5) Financing channel diversification (2/5) Profit repatriation freedom (1/5)
Fiscal and taxation services environment(1/12)	Normalization of fiscal and taxation law enforcement (1/2) Time it takes to handle an application for tax refunds (1/2)
Port services environment(1/12)	Customs clearance of goods (1/3) Inspection and quarantine (1/3) Entry and exit of personnel (1/3)
Enterprise establishment and exit environment(1/12)	Land acquisition (1/3) Environmental procedures (1/3) Handling of bankruptcy procedures (1/3)

Each index has a value ranging from 1 to 5 points. In order to facilitate qualitative analysis based on quantification, we have identified a score of 4.5-5 points as very satisfied (excellent), that of 3.5-4.5 points (exclusive) as satisfied, that of 2.5-3.5 points (exclusive) as mediocre, that of 1.5-2.5 points (exclusive) as dissatisfied and that of 1.5 points (exclusive) and below as very dissatisfied.

IV.Composition of Surveyed Enterprises

(1) Over 80% are small and medium-sized enterprises with 500 employees and below

In terms of enterprise size, of the 5,263 enterprises completing the survey, 3,174 ones each have a size of 100 employees and below, accounting for 60.3%; 1,426 ones each have a size of 100-500 employees, accounting for 27.1%; 444 ones each have a size of 500-2,000 employees, accounting for 8.4%; and 219 ones each have a size of more than 2000 employees, accounting for 4.2%. The share of enterprises with 500

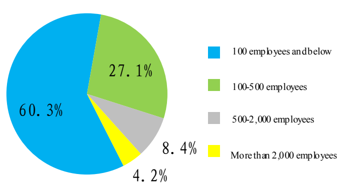

Fig.1 Distribution of Enterprises by Size

500 人及以下规模中小企业占受访企业的 87.4%。

（二）注册资本 2000 万元以下企业占六成以上

从企业注册资本角度看，共有 5209 家企业完成此项调查，其中，注册资本 500 万元以下小微企业 2093 家，占 40.2%；500 万 -2000 万元的中小企业 1400 家，占 26.9%；2000 万 -5000 万元的企业 612 家，占 11.7%；5000 万元以上的大型企业 1104 家，占 21.2%。注册资本 2000 万元以下企业占 67.1%。

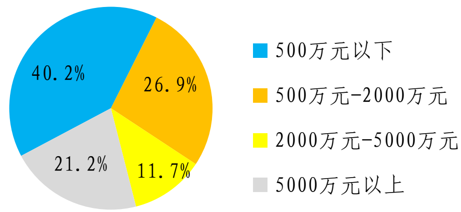

图2 企业注册资本分布图

（三）超七成为持续经营 5 年以上企业

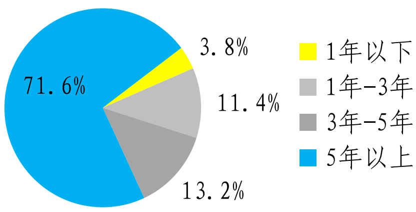

图3 企业持续经营时间分布图

从持续经营时间分析，共有 5276 家企业完成此项调查，其中，5 年以上企业 3780 家，占 71.6%；3-5 年的企业 695 家，占 13.2%；1-3 年的企业 601 家，占 11.4%，1 年以下企业 200 家，占 3.8%。长期经营的企业占绝大多数。

（四）传统制造业、服务行业、高新技术产业占比较大

受访企业按行业划分为以下六类：传统制造业、服务行业、高新技术产业、资源、建筑及其他行业，共有 5236 家企业完成此项调查，其中，传统制造业 1790 家，占 34.2%；服务行业 958 家，占 18.3%；高新技术产业 750 家，占 14.3%；建筑业 182 家，占 3.5%；资源行业 150 家，占 2.9%；其他行业 1406 家，占比为 26.9%。

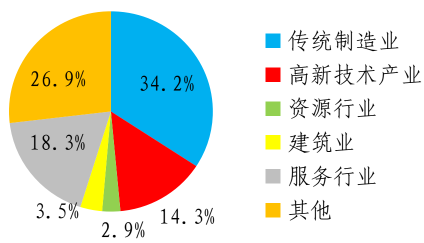

图4 受访企业行业比例图

（五）超七成为私营企业，外资企业占 9.2%

按照企业所有制划分，调研企业分为五类：国有及国有控股企业（以下简称国有企业），集体企业，私营企业，中外合资、合作企业，外商独资企业，合伙企业和其他类型企业（含联营企业和个人独资户等），共有 5270 家企业完成此项调查。其中，私营企业 3714 家，

employees and below in all the enterprises surveyed is 87.4%.

(2) Over 60% are enterprises with registered capital of less than RMB 20 million

In terms of registered capital, of the 5,209 enterprises completing the survey, there are 2,093 small and micro enterprises with registered capital of less than RMB 5 million, accounting for 40.2%; 1,400 small and medium-sized enterprises (SMEs) with registered capital of RMB 5-20 million, accounting for 26.9%; 612 enterprises with registered capital of RMB 20-50 million, accounting for 11.7%; and 1,104 large enterprises with registered capital of more than RMB 50 million, accounting for 21.2%. The share of enterprises with capital registered of RMB 20 million is 67.1%.

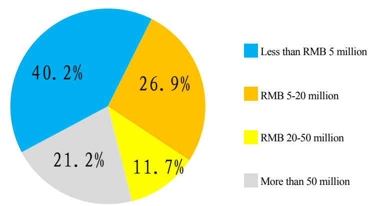

Fig.2 Distribution of Enterprises by Registered Capital

(3) Over 70% are enterprises that have continuously operated for more than five years

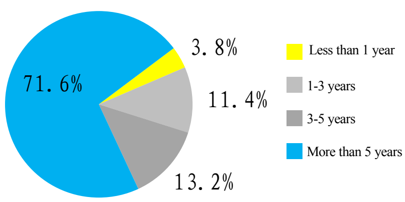

Fig.3 Distribution of Enterprises by Duration of Business Operation

In terms of duration of operation, of the 5,276 enterprises completing the survey, 3,780 ones have a history of more than five years, accounting for 71.6%; 695 ones have a history of 3-5 years, accounting for 13.2%; 601 ones have a history of 1-3 year, accounting for 11.4% and 200 ones have a history of less than one year, accounting for 3.8%. Therefore, most of the enterprises maintain long-term business operation.

(4) Enterprises engaged in traditional manufacturing, services and high and new technologies occupy a large proportion

Enterprises surveyed are engaged mainly in the following six industries: traditional manufacturing, services, high and new technologies, resources, construction and others. Of the 5236 enterprises completing the survey, there are 1,790 traditional manufacturing enterprises, accounting for 34.2%; 958 service enterprises, accounting for 18.3%; 750 high-tech enterprises, accounting for 14.3%; 182 construction enterprises, accounting for 3.5%; 150 resource-related enterprises, accounting for 2.9%; and 1,406 ones engaged in other industries, accounting for 26.9%.

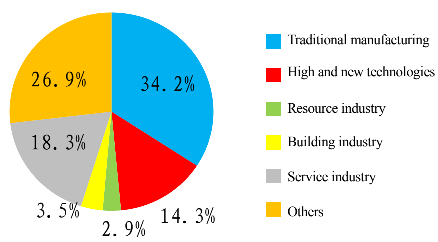

Fig.4 Industry-specific Proportions of Enterprises Surveyed

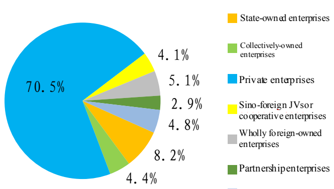

Fig.5 Proportions of Enterprises Surveyed of Different Types

(5) Over 70% are private enterprises and 9.2% are foreign-funded enterprises

Enterprises surveyed involve five types of ownership: state-owned and state-controlled enterprises (hereinafter referred to as state-owned enterprises), collectively-owned enterprises, private enterprises, Sino-foreign joint venture and cooperative enterprises, wholly foreign-owned

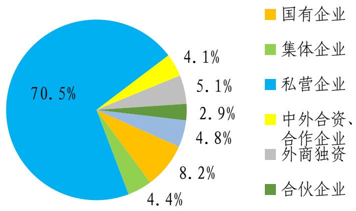

图5 不同受访类型企业比例分布图

占70.5%；国有企业431家，占8.2%；外商独资企业271家，占5.1%；集体企业230家，占4.4%；中外合资、合作企业216家，占4.1%；合伙企业155家，占2.9%；其他类型企业253家，占4.8%。

五、主要结论

本报告主要结论如下：

（一）2019年企业对中国营商环境评价总体良好

2019年以来，各地区、各部门按照党中央、国务院的统一部署，深化“放管服”改革，推动营商环境不断优化。世界银行《2020年营商环境报告》显示，2019年度中国营商环境总体评价为77.9分，比2018年上升4.26分；中国排名由2018年的全球第46位，再次提升15位，位列31位，中国在过去一年里为中小企业改善营商环境实施的改革数量创纪录，是东亚及太平洋地区唯一一个进入2019年世界银行营商环境报告10大最佳改革者名单的经济体，为世界银行营商环境报告发布以来中国最好名次。中国美国商会、中国欧盟商会等外国驻华商协会均认为，中国营商环境取得较大改善。

根据贸促会的企业问卷调查，2019年对中国营商环境评价为较满意及以上企业占90.5%，九成以上认为近3年中国营商环境获得改善，其中，口岸服务、财税服务等环境评价较高，金融服务、人力资源等环境评价较低。

与2018年相比，企业对2019年中国营商环境评价有所提升，满意度比2018年提高3.12%；不同地区、不同行业及不同所有制企业的评价均有所提升。同时，九成以上企业营收正增长，近5年收益变动呈良性趋势。开拓市场、利用资源最受企业关注，个人投资者为企业接受投资主要来源，公司所在地为再投资首选，进一步开放市场是中国最重要商业机会。

（二）中国营商环境建设取得显著成就

2019年，中国营商环境建设取得的成就具体表现为：政策政务环境持续优化；对外开放水平再上新台阶；社会信用体系建设成果显著；通关便利化水平进一步提升；知识产权保护全面加强；社会治安环境改善明显；基础设施建设大大加强。

enterprises, partnerships and others (including consortiums and individual proprietorships, etc.). Of the 5,270 enterprises completing the survey, there are 3,714 private enterprises, accounting for 70.5%; 431 state-owned ones, accounting for 8.2%; 271 wholly foreign-owned ones, accounting for 5.1%; 230 collectively-owned ones, accounting for 4.4%; 216 Sino-foreign joint venture and cooperative enterprises, accounting for 4.1%; 155 partnerships, accounting for 2.9%; and 253 ones of other types, accounting for 4.8%.

V.Main Conclusions

This report has drawn the following main conclusions:

(1) Enterprises have rated China's business environment in 2019 as generally good

Since the beginning of 2019, local governments and authorities have deepened the reform of streamlining administration, delegating power and improving government services, and vigorously promoted the continuous optimization of the business environment in the light of the unified deployment made by the CPC Central Committee and the State Council, giving rise to rapid economic and social development and momentum of rapid growth of private investment, the tertiary industry and emerging industries in China. According to the Doing Business 2020 of the WB, China's business environment generally scores 77.9 points in 2019, an increase of 4.26 points relative to 2018; and China again has moved up 15 places on the list from the 46th in 2018 to the 31st. China has set a new record for the number of the reforms it has carried out to improve the business environment for SMEs over the past year and is the only East Asian and Pacific economy that is included in the list of the Top 10 Reformers in the WB's Doing Business 2019, which is the best ranking of China since the release of the first Doing Business report. Foreign chambers of commerce in China, such as American Chamber of Commerce in China and European Chamber, argue that it is significantly easier to do business in China.

According to CCPIT's questionnaire survey with enterprises, in 2019, 90.5% of the enterprises are satisfied with the business climate in China and over 90% have found it easier to do business in China over the past three years, with port services and fiscal and taxation services highly appraised and financial services and human resources given relatively low scores.

Compared with 2018, enterprises give China's business environment higher scores in 2019, with their satisfaction increasing by 3.12%; enterprises in different regions, from different industries and of different types of ownership have all improved their opinions on China's business environment. Meanwhile, over 90% of enterprises witness positive growth of their revenues and a benign trend of changes in their earnings over the past five years. Exploiting markets and utilizing resources are most concerned by enterprises, individual investors are the major source of investment in enterprises, location is a major consideration of reinvestment and further opening the market is the most important business opportunity for China.

(2) Remarkable achievements have been made in the construction of China's business environment

In 2019, China has made the following specific achievements in the construction of its business environment: continuous optimization of the policy and government environment; the level of opening-up reaching a new stage; remarkable achievements in the construction of the social credit system; further improvements in the facilitation of customs clearance; comprehensively enhanced IPRs protection; significantly improved public security environment; and greatly strengthened infrastructure construction.

（三）中国营商环境仍有待改进

结合问卷统计结果和调研分析研究，中国营商环境存在的主要问题：**一是**部分地区政策制定、执行的科学性、精准性有待提升，**二是**企业综合经营成本居高不下，**三是**人力资源结构、政策等方面仍存在不足，**四是**企业融资困难仍未缓解，**五是**一些地区产业配套保障能力不足。

（四）对策建议

针对上述问题提出以下对策建议：**一是**进一步提升政府效率和技能，优化政策政务环境；**二是**切实缓解企业成本压力，**三是**大力培育人力资本优势，**四是**合力破解企业融资难题，**五是**进一步提升产业配套能力。

(3) Improvements in China's business environment are yet to be expected

Based on questionnaire statistics, investigation and analysis results, China's business environment has the following main problems: firstly, policies in some regions should be developed and executed in a more scientific and accurate manner; secondly, overall operating costs of enterprises remain high; thirdly, the structure, policy and other respects of human resources are still inadequate; fourthly, enterprises are still faced with financing difficulties; fifthly, the industrial supporting and guarantee capacity remains a problem in some regions.

(4) Countermeasures and recommendations

We bring forward the following countermeasures and recommendations have been put forward for the problems above: firstly, we should further improve government efficiency and skills, and optimize the policy and government environment; secondly, we should practically relieve enterprises' cost pressure; thirdly, we should vigorously develop advantages in human capital; fourthly, we should make concerted efforts to address enterprises' financing difficulties; fifthly, we should further improve the industrial supporting capacity.

第一章 中国营商环境总体评价

本报告第一章、第二章、第三章，即中国营商环境总体评价、细分指标评价和企业经营与投资状况三部分，数据主要来源于2019年度中国贸促会组织的中国营商环境企业问卷调查。

2019年中国营商环境总体评价主要从地区、行业及年度对比等角度进行分析研究。企业问卷调查显示，2019年中国营商环境总体评价良好，受访企业满意度连年持续提高。

一、中国营商环境评价总体良好

（一）超九成受访企业认为中国营商环境为较满意及以上

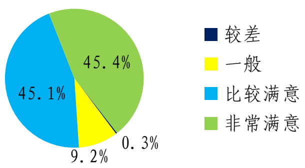

图1-1 2019年度中国营商环境总体满意度占比图

2019年中国营商环境评价总体良好。受访企业对中国营商环境评价为4.299分，总体较满意。其中，较满意及以上占90.5%，评价一般企业占9.2%，评价较差及以下仅占0.3%。

（二）九成以上企业认为近3年营商环境获得改善

动态看，受访企业对近3年中国营商环境总体改善状况较满意，评价为4.30分；对公司所在地区营商环境改善状况评价为4.24分。认为中国、公司所在地区营商环境得到改善的企业占比分别高达91.6%、88.2%（数据为有一些改善与有很大改善的企业占比之和），认为没有改善的企业分别为6.7%、8.1%，认为恶化的企业仅占1.8%、3.7%。

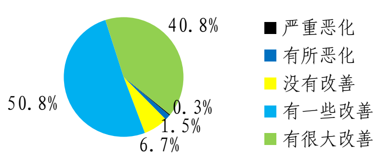

图1-2 近3年来中国营商环境改善示意图

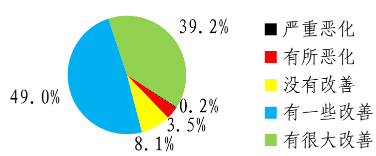

图1-3 近3年来公司所在地区营商环境改善示意图

Chapter I Overall Evaluation of China's Business Environment

Data used in Chapters I, II and III of this report, namely Overall Evaluation of China's Business Environment, Segmenting Indexes for Evaluation and Business Operation and Investment, comes mainly from the 2019 questionnaire survey organized by CCPIT for enterprises.

The overall evaluation of China's business environment in 2019 is mainly derived from analysis and study of enterprises in different regions and from different industries, and a year-over-year comparison. The questionnaire survey indicates that China's business environment in 2019 is rated as generally good and enterprises surveyed have continuously increased their satisfaction for years.

I.China's business environment is rated as generally good

(1) Over 90% of the enterprises surveyed rate China's business environment as satisfied and above

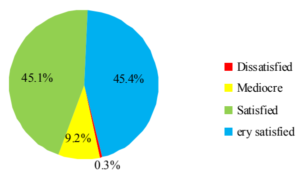

Fig.1-1 Proportions of the Overall Satisfaction with China's Business Environment in 2019

China's business environment in 2019 is rated as generally good. Enterprises surveyed give a score of 4.299 points on China's business environment, implying that they are generally satisfied. To break it down, 90.5% of the enterprises are satisfied and above, 9.2% consider it mediocre and only 0.3% are dissatisfied and below.

(2) Over 90% of the enterprises believe that the business environment has been improved over the past three years

Dynamically, enterprises surveyed are satisfied with and give a score of 4.30 points on the overall improvement of China's business environment over the past three years; and they give a score of 4.24 points on the improvement of the business environment in regions where they are. Enterprises that believe improvements in the business environment in China and in regions where they are, respectively, account for 91.6% and 88.2% (the sum of the proportions of enterprises that suggest some improvements and that suggest significant improvements); those that believe no improvements account for 6.7% and 8.1% respectively; while those that believe deterioration account for only 1.8% and 3.7% respectively.

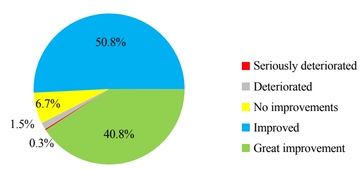

Fig.1-2 Improvement of China's Business Environment over the Past Three Years

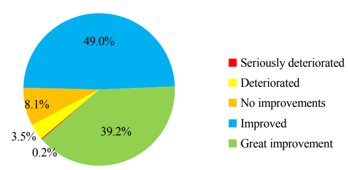

Fig.1-3 Improvement of the Business Environment in Regions Where Enterprises Are over the Past Three Years

（三）各项指标总体评价较好且分值较均衡，口岸服务环境评价最高，人力资源环境评价较低

从 12 个一级指标看，中国营商环境评价良好，均值达到 4.299 分，且各个指标评价较为均衡，有 10 个指标评价分值在 4.20-4.50 之间；口岸服务评价最高，为 4.48 分；人力资源环境评价最低，为 4.018 分；金融服务环境评价次低，为 4.133 分。

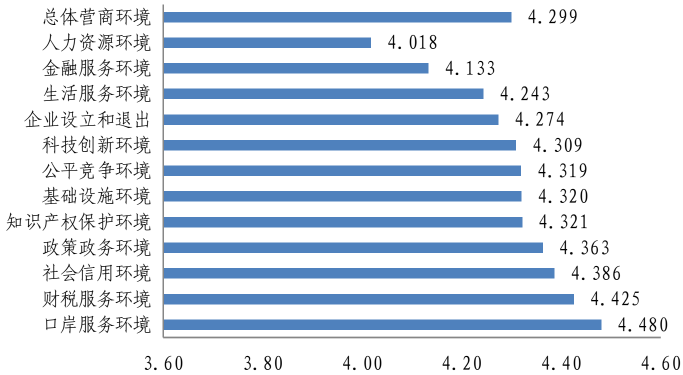

图1-4 中国营商环境总体及各项指标评价

（四）大型企业评价最高，小微企业评价居中，中型企业评价最低

从企业规模角度分析，2000 人以上大型企业评价最高，为 4.41 分；100-2000 人企业评价居中，500-2000 人中型企业评价为 4.36 分；100-500 人中小企业评价略低，为 4.34 分；100 人以下小微企业评价最低，为 4.27 分。

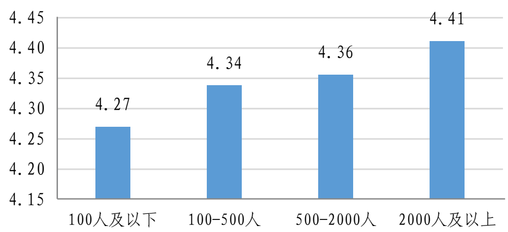

图1-5 不同规模企业对中国营商环境总体评价图

（五）2019 年企业对营商环境评价比上年提升 3 个百分点

与 2018 年相比，2019 年中国营商环境企业评价明显提升。2018 年中国营商环境总体评价为 4.17 分，2019 年为 4.30 分，2019 年比 2018 年评分提升 3.12%；2018 年中国营商环境评价为较满意以上企业占 87.5%，2019 年为 90.5%，提升 3 个百分点。

动态看，2018 年，与 1-3 年前相比，受访企业对全国和公司所在地营商环境总体改善状况评价分别为 4.25 分和 4.21 分；2019 年，与 1-3 年前相比，受访企业对全国和公司所在地营商环境总体改善状况评价分别为 4.30 分和 4.24 分，2019 年比 2018 年评价分别高了 0.05 分、0.03 分。

(3) Each index is given a generally high and relatively even score, with the port services environment scoring the highest while human resources environment scoring the lowestrelatively low

In terms of the 12 primary indexes, China’s business environment is rated as good, with a mean score of 4.299 points, each index scores relatively evenly and 10 indexes each score between 4.20-4.50 points; the port services environment scores 4.48 points, the highest; the human resources environment scores 4.018 points, the lowest; the financial services environment scores 4.133 points, the second lowest.

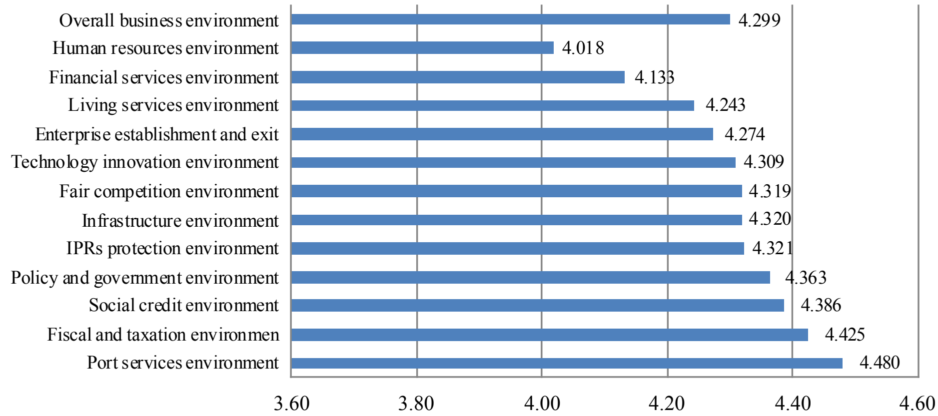

Fig.1-4 Overall and Index-specific Evaluation of China’s Business Environment

(4) Large enterprises give the highest score, small enterprises give a median score and medium-sized enterprises give the lowest score

In terms of enterprise size, large enterprises with more than 2,000 employees give the highest score of 4.41 points; enterprises with 100-2,000 employees give a mediocre score, with medium-sized enterprises with 500-2,000 employees giving a score of 4.36 points; and SMEs with 100-500 employees give a relatively low score of 4.34 points; while small and micro enterprises with less than 100 employees give the lowest score of 4.27 points.

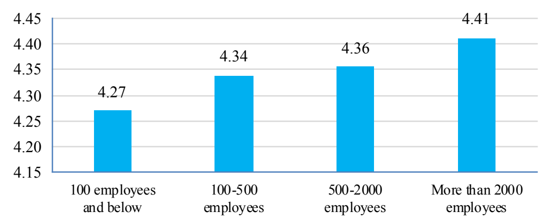

Fig.1-5 Overall Evaluation of China’s Business Environment by Enterprises of Different Sizes

(5) Enterprises have improved their opinions on the business environment by three percent in 2019

Compared with 2018, enterprises think apparently better of China’s business environment in 2019. The overall evaluation of China’s business environment was 4.17 points in 2018 and is 4.30 points in 2019, indicating an increase of 3.12%; the share of enterprises satisfied with China’s business environment and above was 87.5% in 2018 and is 90.5% in 2019, an increase of three percent.

Dynamically, in 2018, enterprises surveyed gave scores of 4.25 and 4.21 points on the overall improvement of the business environment in China and in regions where they were respectively over the past one to three years; in 2019, the scores are 4.30 and 4.24 points, an increase of 0.05 and 0.03 points respectivel.

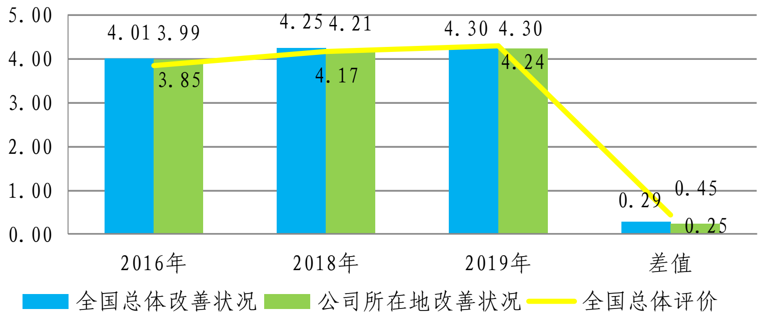

图1-6 中国总体评价与近三年全国、公司所在地改善状况年度对比图

二、各地区企业评价良好

（一）中部地区企业营商环境评价最高

企业问卷调查显示，全国各地区企业对营商环境评价良好（总体均值为4.30分）。从地区角度看，中部地区企业营商环境评价最高，为4.36分；东部地区企业次之为4.31分；西部地区企业评价低于全国均值，为4.21分。

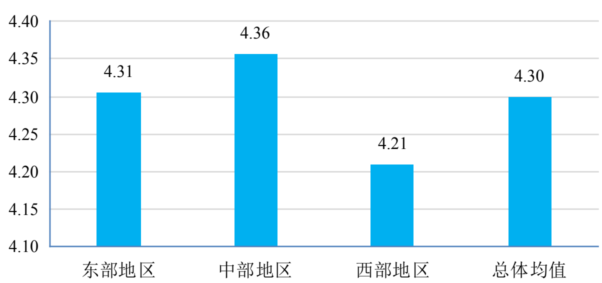

图1-7 不同地区营商环境总体评价图

（二）近四年中部地区企业评价提升幅度最大

动态看，近四年各地区企业营商环境评价均有不同程度提升。其中，中部地区企业评价提升幅度最大，由2016年的3.60分提至2019年的4.36分，提高0.76分，增幅高达21.11%；西部地区次之，提高0.51分；东部地区提升幅度最小，提高0.31分。与2018年

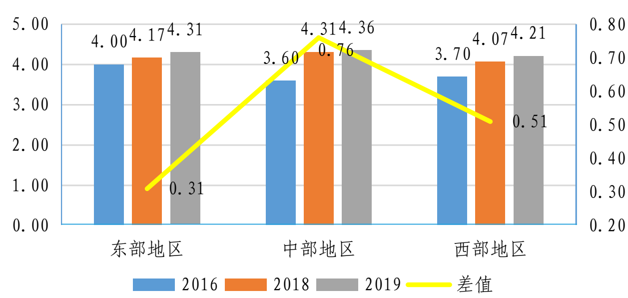

图1-8 不同地区营商环境评价年度对比图

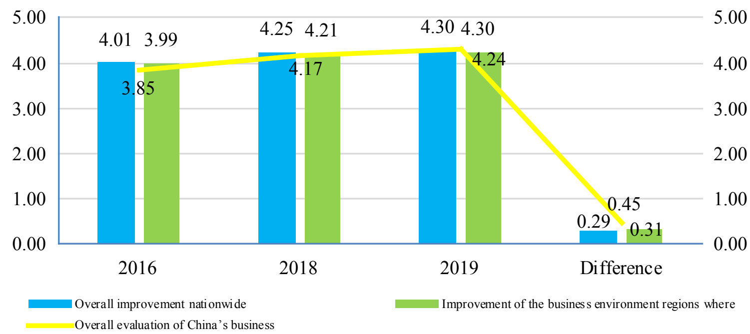

Fig.1-6 Comparison of the Overall Evaluation of China's Business Environment and the Improvement of the Business Environment in China and in Regions Where Enterprises Are over the Past Three Years

II.Enterprises in different regions consider China's business environment good

(1) Enterprises in central China give the highest score on the business environment

According to the questionnaire survey, enterprises throughout the country consider the business

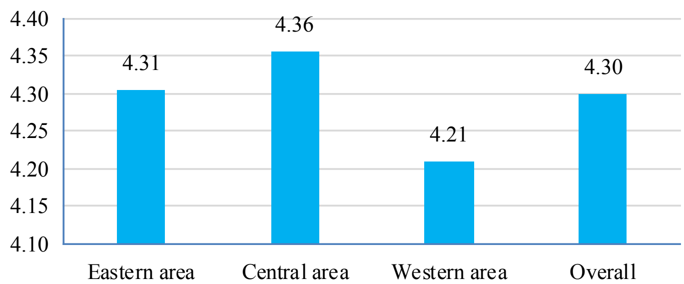

Fig.1-7 Overall Evaluation of the Business Environment in Different Regions

environment good (with an average score of 4.30 points). Geographically, enterprises in Central China give the highest score of 4.36 points; those in the east China give the second highest score of 4.31 points; the score given by western enterprises, which is 4.21 points, is lower than the national average.

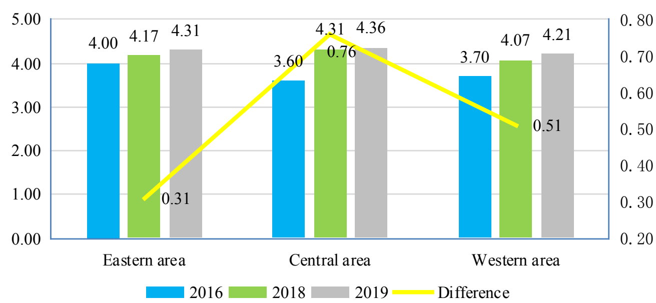

Fig.1-8 Comparison of Evaluation of the Business Environment in Different Regions in Different Years

(2) Enterprises in central China have improved their opinions on the business environment most over the past four years

Dynamically, enterprises in different regions have improved their opinions towards the business environment over the past four years. Specifically, enterprises in central China witness the largest

相比，2019 年东部和西部地区企业评价提升最快，均提高为 0.14 分；中部地区略低，仅提高 0.05 分。

三、各行业营商环境评价良好且较均衡

（一）各行业评价较均衡，资源行业评价最高

从行业角度分析，各行各业对中国营商环境评价总体良好，差异不大，分值在 4.25-4.40 之间。其中，资源行业评价最高，为 4.397 分；传统制造业次之，为 4.331 分；高新技术产业为 4.287 分；其他行业和服务行业较低，分别为 4.271 分、4.263 分；建筑业最低，为 4.255 分。

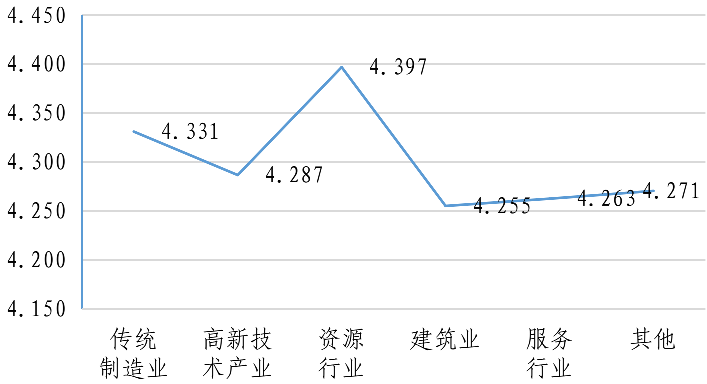

图1-9 不同行业企业营商环境总体评价图

（二）各行业评价均有提升，高新技术产业评价提升幅度最大

近 4 年来，各行业评价均有不同程度提升，但不同行业提升幅度不同。其中，高新技术产业从 2016 年的 3.78 分提高至 2019 年的 4.29 分，提升幅度最大（提高 0.51 分）；高新技术产业和服务行业次之，均提高 0.49 分，资源行业提高 0.45 分，建筑业提高 0.40 分，其他行业提升幅度最小（提高 0.36 分）。

improvement, from 3.60 points in 2016 to 4.36 points in 2019, an increase of 0.76 points and 21.11%, followed by those in the west, with an improvement of 0.51 points; those in the east witness the smallest improvement of 0.31 points. Compared with 2018, enterprises in the east and west witness the fastest improvement in 2019, both of 0.14 points, followed by those in central China, with an improvement of only 0.05 points.

III.Enterprises engaged in different industries give high and relatively even scores on the business environment

(1) Enterprises engaged in different industries given relatively even scores and those in the resource industry give the highest score

In terms of industries, enterprises engaged in different industries rate the business environment as generally good, with little difference in scores they give and these scores ranging between 4.25-4.40 points. Specifically, those in the resource industry give the highest score of 4.397 points, followed by those in traditional

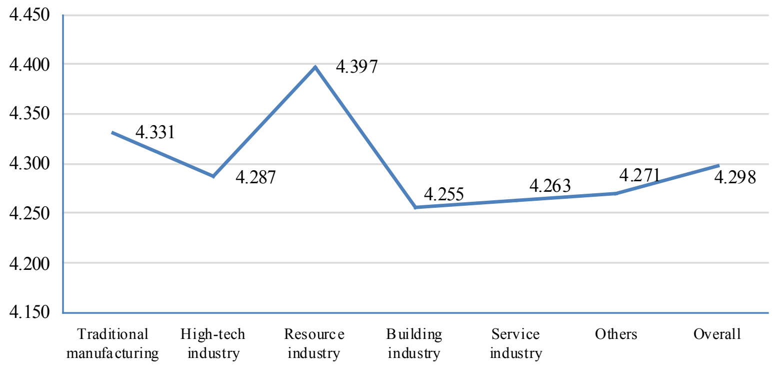

Fig.1-9 Overall Evaluation of the Business Environment by Enterprises of Different Types of Ownership

manufacturing (4.331 points), those in the high and new technology industry (4.287 points), those in service and other industries (4.271 and 4.263 points respectively) and those in the construction industry (4.255 points).

(2) Enterprises engaged in different industries have all improved their opinions on the business environment, with those in the high and new industry witnessing the largest improvement

Over the past four years, enterprises engaged in different industries have all improved their opinions on the business environment in varying degrees. Specifically, high-tech enterprises witness the largest improvement, from 3.78 points in 2016 from 4.29 points in 2019 (an increase of 0.51 points), followed by those in the high and new technology industry and the service industry (both an increase of 0.49 points), those in the resource industry (an increase of 0.45 points), those in the construction industry (an increase of 0.40 points) and those in other industries (an increase of 0.36 points).

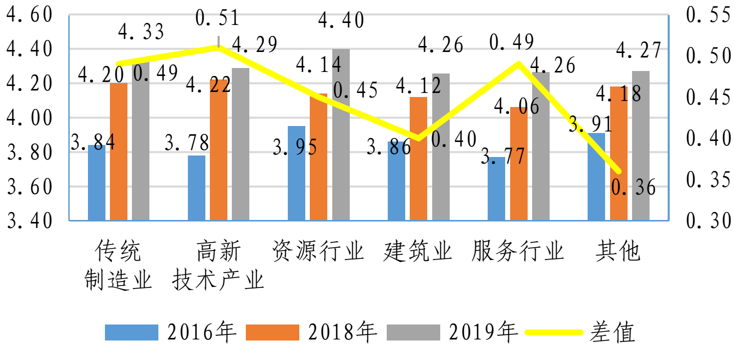

图1-10 不同行业营商环境评价均值年度对比图

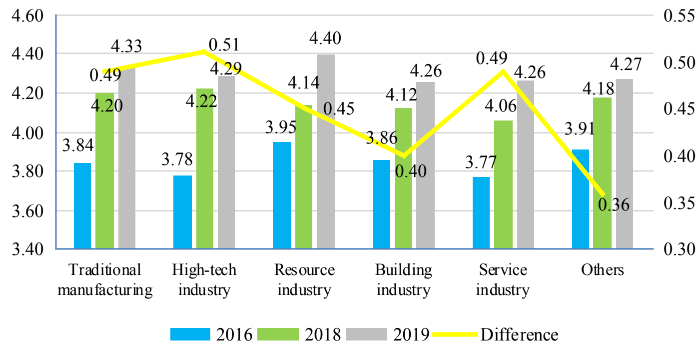

Fig.1-10 Comparison of Average Evaluation of the Business Environment by Enterprises in Different Industries in Different Years

第二章 中国营商环境细分指标评价

2019 年中国营商环境细分指标评价主要包括基础设施、政策政务及口岸服务环境等 12 个一级指标和 51 个二级指标。企业问卷调查显示，2019 年中国营商环境各一级指标评分比 2018 年均有不同程度的提升。

一、基础设施环境总体良好

基础设施环境指标细分为交通运输、网络通信、水电气供应、环保设施及城市规划和建设五个二级指标。2019 年受访企业对基础设施环境评价总体良好，与 2018 年相比，2019 年各项二级指标评价均有不同程度提升。

（一）近九成企业对基础设施环境的评价为较满意及以上

基础设施环境总体评价良好（4.320 分），在 12 个一级指标中排第六，高于中国营商环境总体评价（均值为 4.299 分）。从基础设施环境细分指标看，水电气供应（4.41 分）和网络通信（4.35 分）评价较高，城市规划和建设（4.22 分）较低。

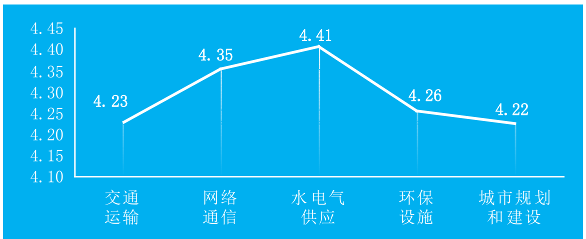

图2-1 基础设施环境细分指标评价图

从企业满意度看，企业对基础设施环境的满意度略低于中国营商环境满意度（90.50%），评价为较满意及以上企业占 89.10%；评价为一般的企业占 10.20%；极少数企业评价为较差及以下，该类企业占 0.70%。

从细分指标看，水电气供应满意度最高（89.30%），城市规划和建设评价最低（82.80%）；网络通信、环保设施和交通运输评价居中，企业满意度在 83%-88% 之间。

Chapter II. Evaluation Score of Chinese Business Environment Sub-indicators

Sub-indicators used to evaluate China's business environment in 2019 mainly include 12 first-level indicators, such as infrastructure environment, policy and government environment and port service environment, as well as 51 second-level indicators. Questionnaire surveys among enterprises show that scores of first-level indicators in 2019 have improved to different degrees compared with those in 2018.

I.Overall evaluation result of infrastructure environment is good

Infrastructure environment sub-indicators include 5 second-level indicators: transportation, network communication, supply of water, power and gas, environmental facilities, and urban planning and construction. In 2019, the surveyed enterprises give a favorable evaluation of the overall infrastructure environment. Compared with 2018, the scores of the secondary indicators in 2019 have improved to different degrees.

(1) Nearly 90% of enterprises regard infrastructure environment as satisfactory and above.

The infrastructure environment gains a good evaluation result (4.320) as a whole, ranking sixth among the 12 first-level indicators and higher than the overall evaluation result of China's business environment (4.299 on average). Among the infrastructure environment sub-indicators, supply of water, power and gas (4.41) and network communication (4.35) rank higher, and urban planning and construction (4.22) is lower.

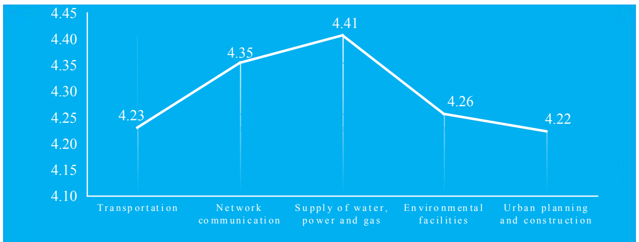

Chart 2-1 Evaluation of infrastructure environment sub-indicators

From the perspective of satisfaction rate, enterprises are slightly less satisfied with infrastructure environment than with China's business environment (90.50%). Of the enterprises, 89.10% consider it satisfactory and above, 10.20% consider it fair, and only a few (0.70%) consider it poor or below.

Among the sub-indicators, supply of water, power and gas ranks highest (89.30%) and urban planning and construction ranks lowest (82.80%). Network communication, environmental facilities and transportation are in-between, ranging from 83% to 88%.

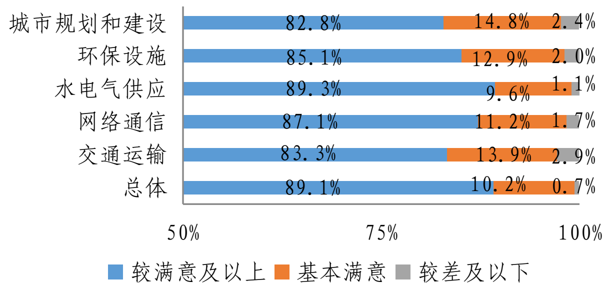

图2-2 基础设施环境细分指标满意度占比图

（二）东中部地区评价评价较高、西部地区评价较低

不同地区企业对基础设施环境评价差异较大，东中部评分高于基础设施环境均值（4.30分）。其中，东部以4.34分高居第一，中部企业评价次之，为4.32分；西部最低，为4.22分。

从企业满意度看，各地区满意度较高。其中，超九成东部、中部受访企业评价为较满意及以上；西部略低，评价为较满意及以上企业占比为86.10%。

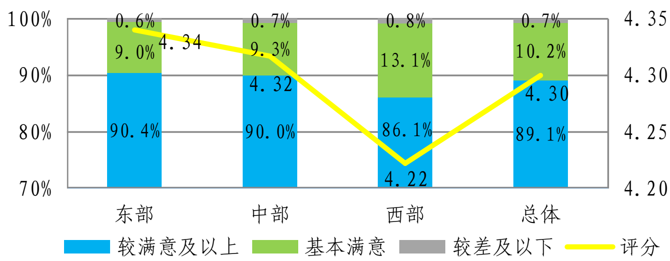

图2-3 各地区对基础设施环境综合评价图

从基础设施细分指标看，中部受访企业对交通运输评价最高，为4.29分；东部企业对网络通信、水电气供应、环保设施以及城市规划和建设评价均为最高，分别为4.41分、4.47分、4.28分、4.27分）；西部受访企业对基础设施各项细分指标评价均为最低，分别为4.13分、4.27分、4.30分、4.20分、4.13分。

不同地区企业对水电气供应评价差异最大，东部评价最高（4.47分），西部评价最低（4.30分），相差0.17分。

表2-1 各地区对基础设施环境细分指标的评价

排名	交通运输		网络通信		水电气供应		环保设施		城市规划和建设		总体
	地区	得分	地区	得分	地区	得分	地区	得分	地区	得分	
1	中部	4.29	东部	4.41	东部	4.47	东部	4.28	东部	4.27	东部
2	东部	4.27	中部	4.36	中部	4.42	中部	4.27	中部	4.26	中部
3	西部	4.13	西部	4.27	西部	4.30	西部	4.20	西部	4.13	西部

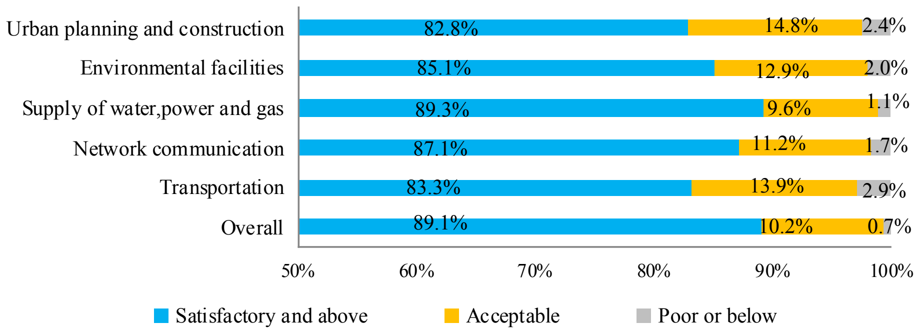

Chart 2-2 Proportion of satisfaction rate of infrastructure environment sub-indicators

(2) Evaluation result is higher in eastern and central areas while lower in the western area.

Enterprises in different areas have different evaluations of infrastructure environment, and the scores given by eastern and central areas are higher than the average score of infrastructure environment (4.30). The eastern area ranks first with 4.34 points, followed by the central area with a score of 4.32 points, and the lowest score comes from the western area, at 4.22 points.

From the perspective of satisfaction rate, the rate is high in all areas. Over 90% of the eastern and central enterprises surveyed consider infrastructure environment satisfactory and above. The rate is slightly lower in the western area, where 86.10% consider it satisfactory and above.

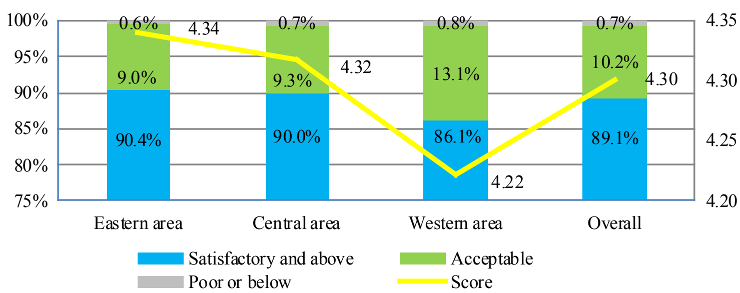

Chart 2-3 Comprehensive evaluation of infrastructure environment in different areas

From the perspective of infrastructure sub-indicators, the central area gives transportation the highest score at 4.29. The eastern area gives network communication, supply of water, power and gas, environmental facilities, and urban planning and construction the highest scores, respectively at 4.41, 4.47, 4.28, and 4.27. The western area gives all sub-indicators of infrastructure the lowest scores, respectively at 4.13, 4.27, 4.30, 4.20, and 4.13.

The evaluation of supply of water, power and gas varies the greatest across areas. The eastern area gives the highest of 4.47 points and the western area gives the lowest of 4.30 points, a gap of 0.17 points.

Table 2-1 Evaluation of infrastructure environment sub-indicators in different areas

Ranking	Transportation		Network communication		Supply of water, power and gas		Environmental facilities		Urban planning and construction		Overall
	Area	Score	Area	Score	Area	Score	Area	Score	Area	Score	
1	Central area	4.29	Eastern area	4.41	Eastern area	4.47	Eastern area	4.28	Eastern area	4.27	Eastern area
2	Eastern area	4.27	Central area	4.36	Central area	4.42	Central area	4.27	Central area	4.26	Central area
3	Western area	4.13	Western area	4.27	Western area	4.30	Western area	4.20	Western area	4.13	Western area

（三）水电气供应获好评，资源行业满意度最高

从行业角度分析，整体评价较高且差异不大，在 4.25 分 -4.40 分之间。其中，资源行业对基础设施环境评价最高（4.40 分），高新技术产业次之（4.33 分），传统制造业、建筑业居中（分别为 4.32 分、4.30 分），服务行业对基础设施环境评价略低（4.25 分）。

从企业满意度看，行业间评价差异较小，各行业较满意及以上占比均在 85% 以上，其中，资源行业评价最高，较满意以上企业占比高达 92.60%。

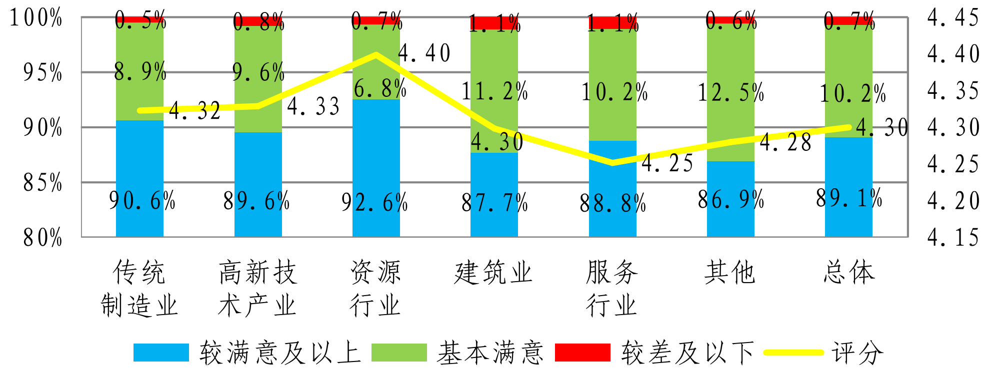

图2-4 各行业对基础设施环境综合评价图

从基础设施环境细分指标看，各个行业对水电气供应评价均为最好，其中资源行业对水电气供应评分最高（4.55 分），属于“非常满意”水平；传统制造业、服务行业对城市规划和建设评价最低（分别为 4.23 分、4.15 分），高新技术产业、资源行业对交通运输评价最低（分别为 4.19 分、4.27 分），建筑业和其他行业对环保设施评价最低（分别为 4.19 分、4.23 分）。

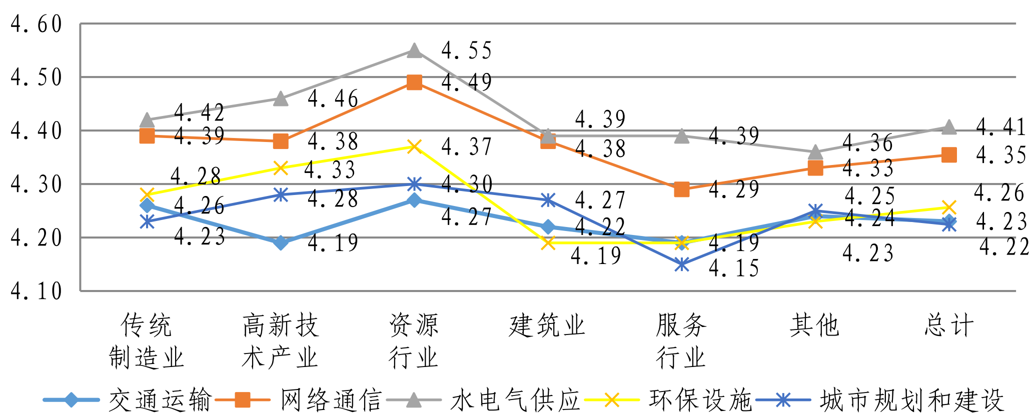

图2-5 不同行业基础设施环境细分指标评价图

(3) Supply of water, power and gas receives good evaluation, and the resource industry is the most satisfied.

From the perspective of industries, the overall evaluation is high and the gap is not large, between 4.25 points and 4.40 points. The resource industry gives infrastructure environment the highest score of 4.40, followed by the high-tech industry (4.33). Traditional manufacturing and building industry (4.32 and 4.30 respectively) are in-between. The service industry gives a slightly lower score to infrastructure environment, at 4.25 points.

From the perspective of satisfaction rate, the evaluation gap across industries is small, and the proportion of enterprises who consider infrastructure environment satisfactory and above exceeds 85% in all industries. The resource industry gives the highest evaluation, with 92.60% of enterprises rating infrastructure environment as satisfactory and above.

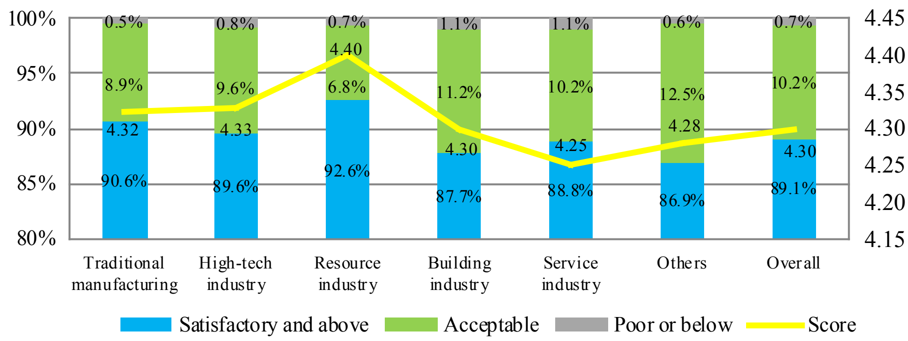

Chart 2-4 Comprehensive evaluation of infrastructure environment in different industries

From the perspective of infrastructure sub-indicators, each industry rates supply of water, power and gas as the best, and the resource industry gives the highest score to it (4.55 points), which means “very satisfactory”. Traditional manufacturing and service industry give the lowest scores to urban planning and construction (4.23 and 4.15 respectively), the high-tech industry and resource industry give the lowest scores to transportation (4.19 and 4.27 respectively), and the building industry and other industries give the lowest scores to environmental facilities (4.19 and 4.23 respectively).

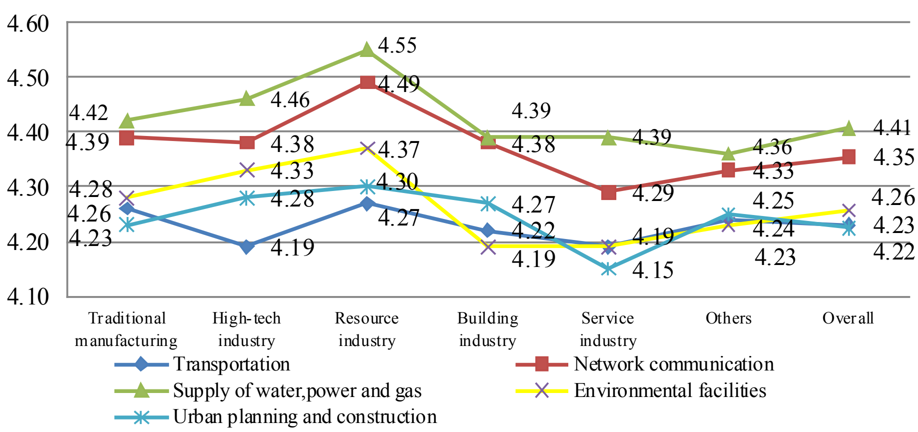

Chart 2-5 Evaluation of infrastructure environment sub-indicators in different industries

（四）近两年企业对基础设施环境评价提升，但中部企业例外

动态看，2018 年受访企业对基础设施环境总体评价为 4.236 分，2019 年为 4.320 分，提升 1.98%；与 2016 年 3.90 分相比，提升 10.77%。

1. 水电气供应评价提升幅度较大，交通运输较小

从基础设施环境细分指标看，2019 年各项指标评价均比 2018 年有所提升。其中，水电气供应和环保设施评价提升幅度均超 0.10 分，水电气供应评价提高 0.14 分；网络通信、城市规划和建设及交通运输提升低于 0.10 分，交通运输仅提升 0.03 分。

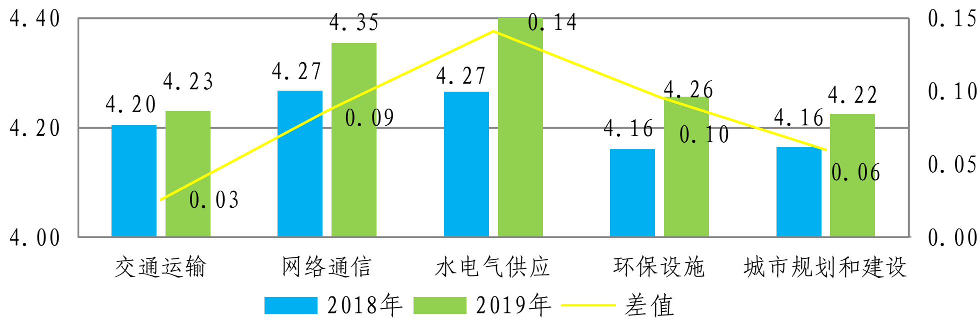

图2-6 基础设施环境细分指标年度评价对比图

2. 东西部企业评价实现正向增长，中部评价有所下降。

从不同地区看，与 2018 年相比，2019 年大部分地区企业评价均有提升，其中，东部提升最大，提高 0.11 分；西部次之，提高 0.07 分；但中部有所下降，由 2018 年的 4.37 分降至 2019 年的 4.32 分。

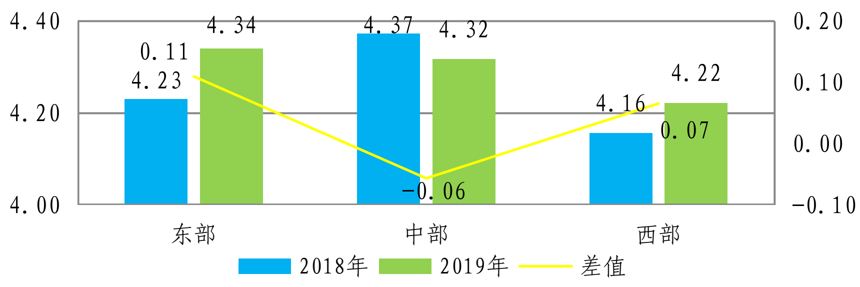

图2-7 基础设施环境不同地区年度评价对比图

3. 服务业评价提升幅度最大，高新技术产业最低。

从行业角度看，与2018年相比，2019年对基础设施环境评价提升幅度差异较大。其中，服务行业评价提升最大（0.14 分），传统制造业和资源行业次之（均为 0.12 分）；其

(4) Evaluation given by enterprises to infrastructure environment has improved in the past two years, but excluding those in the central area.

Dynamically, the overall evaluation of infrastructure environment in 2018 is 4.236 points, and rises to 4.320 points in 2019, an increase of 1.98%. Compared with 3.90 points in 2016, that is an increase of 10.77%.

1. The evaluation of supply of water, power and gas has greatly improved, and improvement in the evaluation of transportation is relatively small.

In terms of infrastructure environment sub-indicators, the evaluations of the sub-indicators in 2019 have improved compared with 2018. Scores of supply of water, power and gas and environmental facilities increase by more than 0.10 points, with the score of the former rising by 0.14 points. Scores of network communication, urban planning and construction, and transportation see increases by less than 0.10 points, with the score of transportation only growing by 0.03 points.

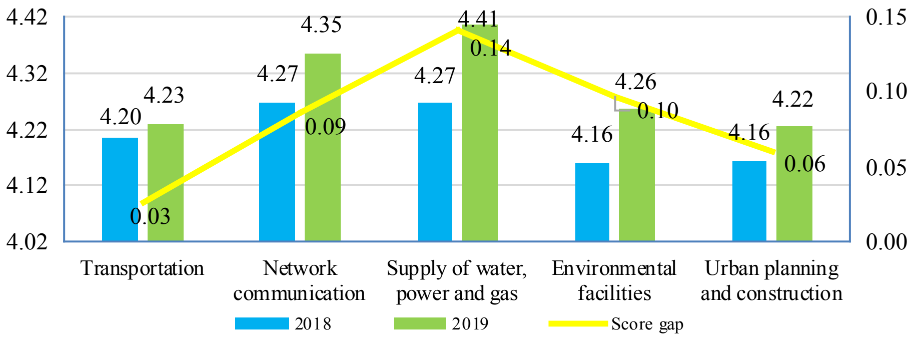

Chart 2-6 Comparison of annual evaluation of infrastructure environment sub-indicators

2. Evaluations given by enterprises in the eastern and western areas see positive growth, and the evaluation by the central area has declined.

From a regional perspective, compared with 2018, the evaluations by enterprises in most areas have improved in 2019, among which the eastern area sees the biggest improvement by 0.11 points, followed by the western area, by 0.07 points. The central area gives a lower score, falling from 4.37 in 2018 to 4.32 in 2019.

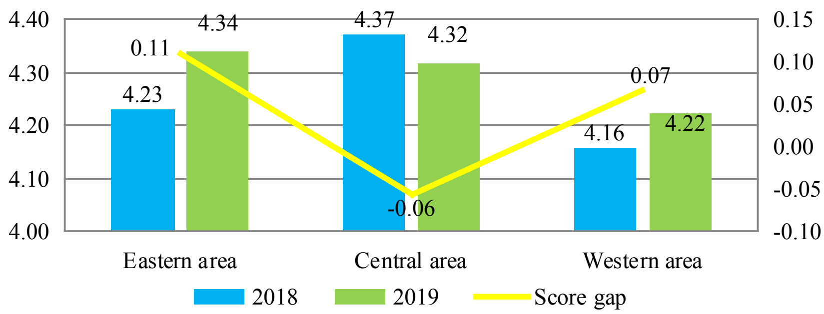

Chart 2-7 Comparison of annual evaluation of infrastructure environment in different areas

3. The service industry sees the largest improvement in evaluation and the high-tech industry sees the lowest.

On an industry basis, compared with 2018, the improvements in infrastructure environment evaluations in 2019 are quite different. The evaluation by the service industry sees the biggest increase (by 0.14 points), followed by traditional manufacturing and resource industry (both by 0.12 points). Improvements in the

余行业评价提升均低于 0.10 分，高新技术产业最低，仅提升 0.01 分。

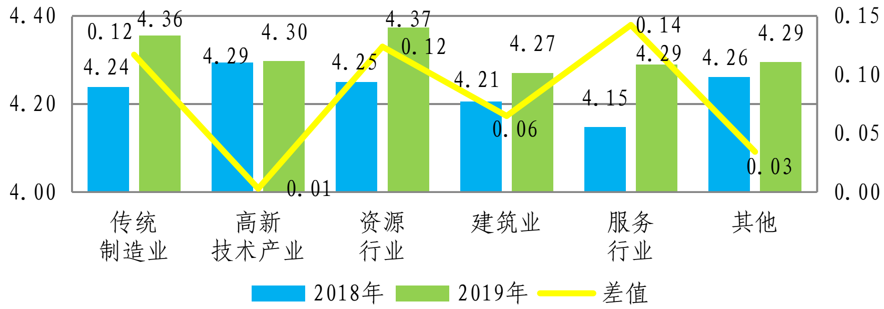

图2-8 基础设施环境不同行业年度评价对比图

二、生活服务环境提升空间大

生活服务环境指标细分为居住条件、医疗卫生、文体设施、教育水平、环境保护和社会治安六个二级指标。2019 年受访企业对生活服务环境总体评价较低，但对社会治安评价较高。

（一）总体评价一般，社会治安评价较高，文体设施评价较低

生活服务环境总体评价为 4.243 分，在 12 个一级指标中排名第 10 位，低于中国营商环境总体评价（4.299 分）。从生活服务环境细分指标看，各项指标差异较大。其中，社会治安评价最高（4.44 分），居住条件次之（4.25 分）；其余指标评价均在 4.20 分以下，文体设施最低，为 4.10 分。

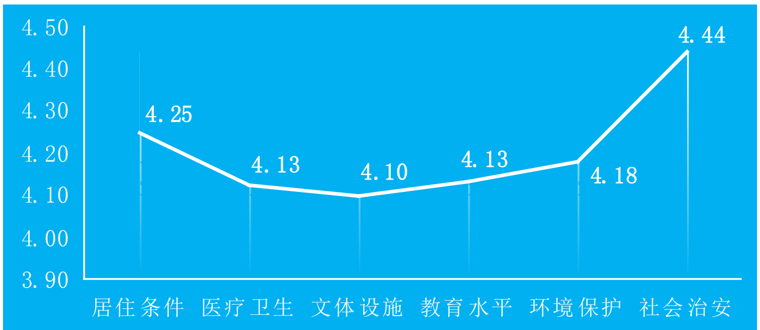

图2-9 生活服务环境细分指标评价

从企业满意度看，较满意及以上企业占 85.40%，评价一般的企业占 11.90%，评价较差及以下仅为 0.70%。从细分指标看，近九成企业对社会治安满意度最高（89.60%），教育水平、医疗卫生满意度较低，均低于 80%，文体设施最低，较满意

evaluations by the rest of the industries are lower than 0.10 points, and the high-tech industry has the lowest increase, only by 0.01 points.

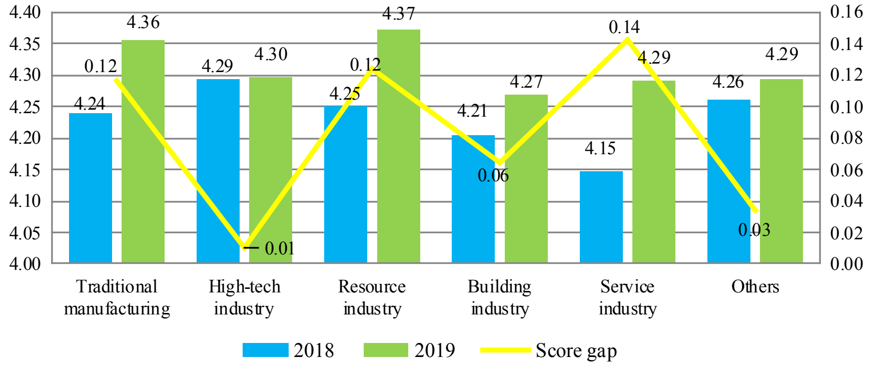

Chart 2-8 Comparison of annual evaluation of infrastructure environment in different industries

II.Living environment needs bigger improvement

Living environment sub-indicators include the 6 secondary indicators of living condition, medical care, recreation and sports facilities, education level, environmental protection and public security. In 2019, the surveyed enterprises have a relatively low evaluation of the overall living environment, but public security is well recognized.

(1) Overall evaluation result is fair, but public security gets a higher score and recreation and sports facilities a lower score.

The overall score of living environment is 4.243 points, ranking tenth among the 12 first-level indicators, lower than the overall score of the business environment in China (4.299 points). Living environment sub-indicators get very different evaluation results. Public security has the highest score (4.44), followed by living condition (4.25). Other sub-indicators are below 4.20 points, and recreation and sports facilities gets the lowest score of 4.10 points.

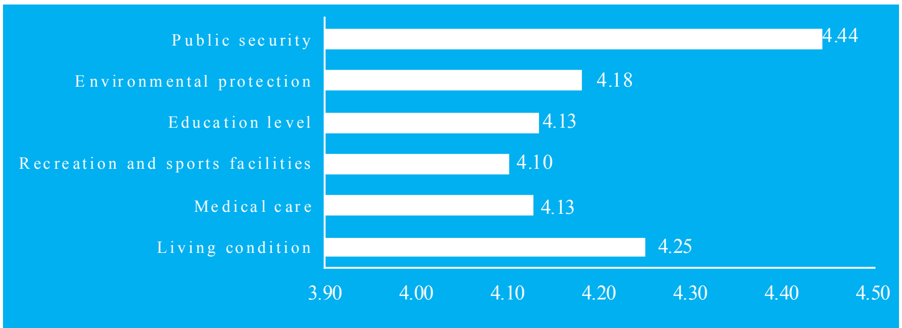

Chart 2-9 Evaluation of living environment sub-ndicators

In terms of satisfaction rate, 85.40% of enterprises consider it satisfactory and above, 11.90% consider it fair, and only 0.70% consider it poor or below. Based on sub-indicators, nearly 90% of enterprises are most satisfied with public security (89.60%). Education level and medical care have low satisfaction rates, both lower than 80%, and recreation and sports facilities has the lowest, at only 75.30%.

及以上企业仅为 75.30%。

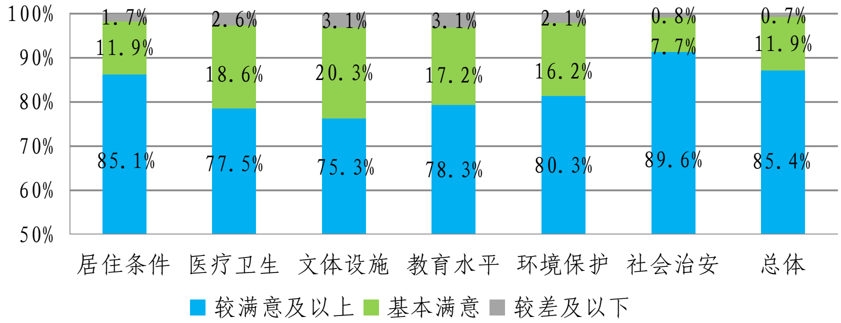

图2-10 生活服务环境细分指标满意度占比图

（二）各地区评价良好且差异较小，东部满意度最高

各地区企业对生活服务环境评价差异较小。其中，东部以 4.25 分位居第一，中部居中（4.21 分），西部最低，为 4.13 分。

从企业满意度看，东、中、西部较满意及以上企业占比呈依次递减特征；一般企业占比反之，呈东中西部依次递增特征。东部满意度最高，为 89.30%；西部最低，为 83.30%。

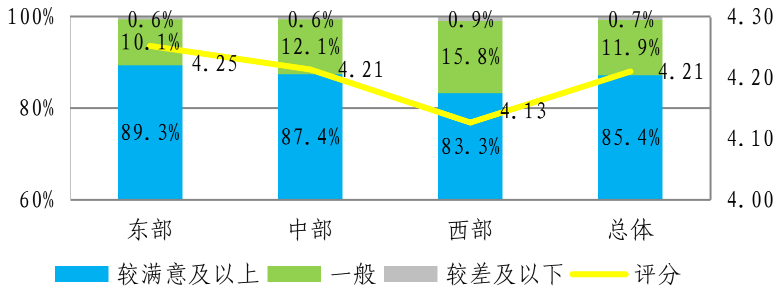

图2-11 各地区对生活服务环境综合评价图

从生活服务环境细分指标看，东部受访企业对大部分细分指标评价均居首位，其中，对社会治安评价最高，达 4.48 分，接近“非常满意水平”；中部企业对居住条件评价最高，为 4.31 分；西部对所有细分指标评价均为最低，对居住条件、医疗卫生、文体设施、教育水平、环境保护、社会治安的评价依次为 4.21 分、4.04 分、4.00 分、4.03 分、4.12 分、4.35 分。各地区普遍对文体设施评价较低，东部最高，仅为 4.17 分；各地区对社会治安评价普遍较高，评价最低的西部企业都达 4.35 分；各地区对教育水平评价差异最大，最高与最低相差 0.18 分。

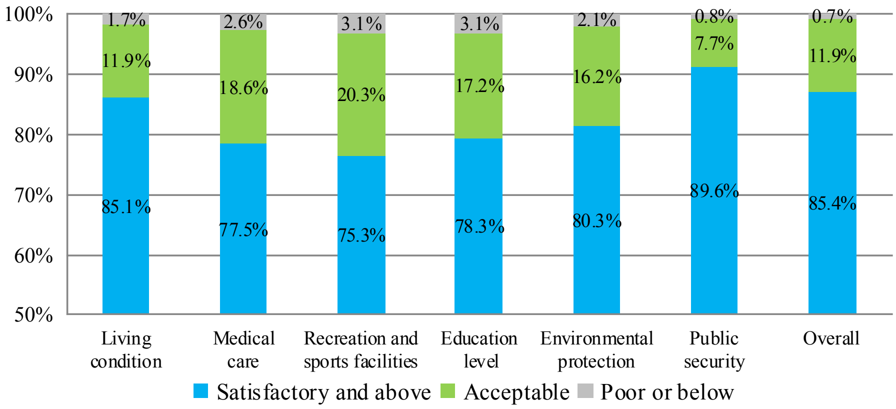

Chart 2-10 Proportion of satisfaction rate of living environment sub-indicators

(2) Evaluations by enterprises in different areas are favorable and have a small difference, and the central area is the most satisfied.

Evaluations of living environment by enterprises in different areas are not that different. The eastern area ranks first with 4.25 points, followed by the central area with 4.21 points and the western area with 4.13 points.

Regarding satisfaction rate, the proportion of enterprises considering living environment satisfactory and above declines from eastern, central to western areas. The proportion of enterprises rating it as fair shows an opposite trend, which increases from eastern, central to western areas. The highest satisfaction rate is in the eastern area, at 89.30%, and the lowest in the western area, at 83.30%.

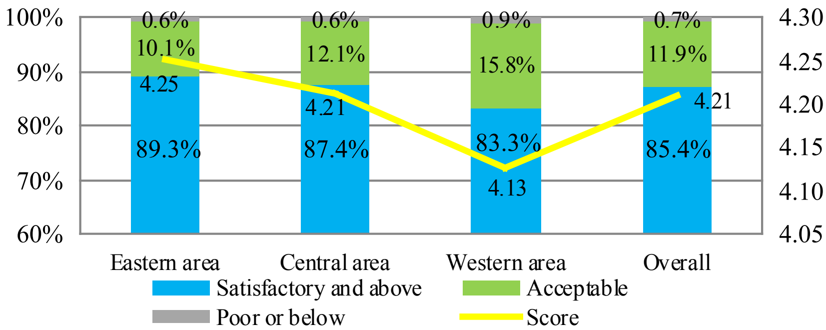

Chart 2-11 Comprehensive evaluation of living environment in different areas

From the perspective of living environment sub-indicators, the enterprises in the eastern area give top evaluations to most sub-indicators, and the score of public security is the highest, reaching 4.48 points, close to “very satisfactory”. Living condition receives the highest score in the central area, at 4.31 points. All sub-indicators receive the lowest scores in the west, including living condition at 4.21, medical care at 4.04, recreation and sports facilities at 4.00, education level at 4.03, environmental protection at 4.12 and public security at 4.35. The evaluations of recreation and sports facilities are generally low in all areas, with the highest in the east, at only 4.17 points. The evaluations of public security in all areas are generally high, and the lowest has reached 4.35 in the western area. The biggest difference is in the evaluations of education level, with a maximum gap of 0.18 points.

表 2-2 各地区对生活服务环境细分指标的评价

排序	居住条件		医疗卫生		文体设施		教育水平		环境保护		社会治安		总体
	地区	得分	地区	得分	地区	得分	地区	得分	地区	得分	地区	得分	
1	中部	4.31	东部	4.20	东部	4.17	东部	4.21	东部	4.21	东部	4.48	东部
2	东部	4.25	中部	4.08	中部	4.07	中部	4.11	中部	4.20	中部	4.47	中部
3	西部	4.21	西部	4.04	西部	4.00	西部	4.03	西部	4.12	西部	4.35	西部

（三）高新技术产业满意度较高，建筑业较低

从行业评价均值看，大部分行业评价均高于 4.20 分。其中，资源行业评价最高（4.34 分），高新技术企业次之（4.25 分），其他行业和服务行业评价均低于 4.20 分，分别为 4.19 分、4.18 分。

从企业满意度看，各行业较满意及以上占比均超 85%。其中，近九成高新技术产业企业为较满意及以上（88.50%），满意度最高；建筑业较低，较满意及以上企业占比为 85.50%。

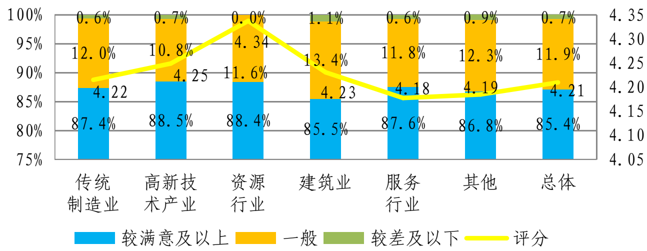

图2-12 不同行业对生活服务环境的评价图

从生活服务环境细分指标看，行业间评价差异明显。各行业对社会治安评分均高于其他细分指标，其中以资源行业、建筑业和高新技术产业评价最为突出，分别为 4.55 分、4.51 分和 4.50 分，均达“优秀”水平；大部分行业对文体设施评价较低，其中，建筑业评价最高（4.27 分），传统制造业评价最低（4.07 分）；建筑业对医疗卫生评价最低，为 3.98 分。

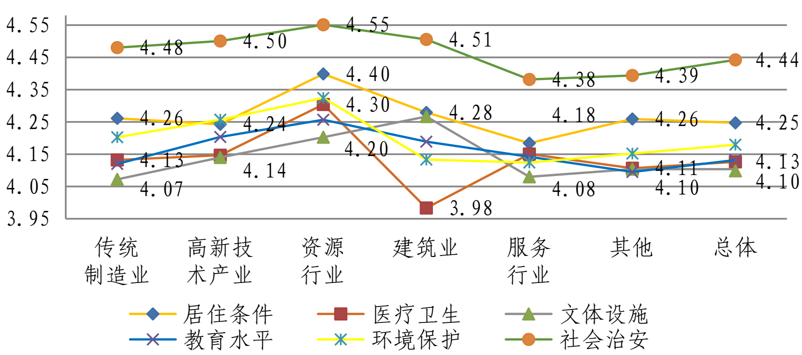

图2-13 不同行业生活服务环境细分指标评价图

Table 2-2 Evaluation of living environment sub-indicators in different areas

Ranking	Living condition		Medical care		Recreation and sports facilities		Education level		Environmental protection		Public security		Overall
	Area	Score	Area	Score	Area	Score	Area	Score	Area	Score	Area	Score	
1	Central area	4.31	Eastern area	4.20	Eastern area	4.17	Eastern area	4.21	Eastern area	4.21	Eastern area	4.48	Eastern area
2	Eastern area	4.25	Central area	4.08	Central area	4.07	Central area	4.11	Central area	4.20	Central area	4.47	Central area
3	Western area	4.21	Western area	4.04	Western area	4.00	Western area	4.03	Western area	4.12	Western area	4.35	Western area

(3) High-tech industry is more satisfied and building industry is less satisfied.

Seen from the average value of industry evaluations, most industries give a score higher than 4.20 points. The resource industry ranks the highest (4.34 points), followed by the high-tech industry (4.25 points). Scores given by the other industries and the service industry are both below 4.20 points, at 4.19 and 4.18 respectively.

From the perspective of satisfaction rate, the proportion of enterprises satisfied and more than satisfied exceeds 85% in all industries. Nearly 90% of high-tech enterprises are satisfied and more than satisfied (88.50%), the highest satisfaction rate. The rate in the building industry is lower, at 85.50%.

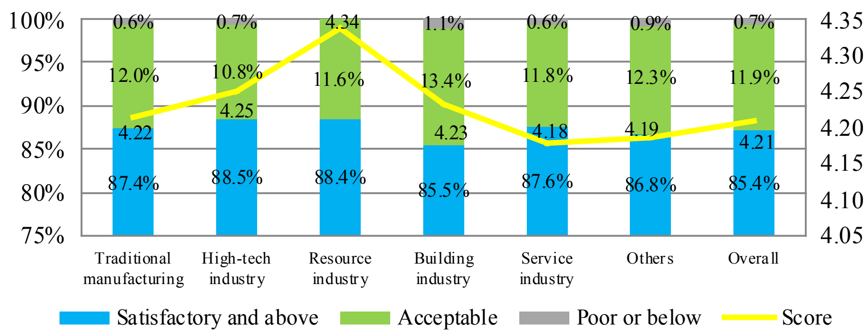

Chart 2-12 Evaluation of living environment in different industries

Seen from living environment sub-indicators, the differences in the evaluations of various industries are obvious. The scores of public security from all industries are higher than that of other sub-indicators, among which the highest scores are given by the resource industry, building industry and high-tech industry, at 4.55 points, 4.51 points and 4.50 points respectively, all reaching the "excellent" level. Most industries have low evaluations of recreation and sports facilities, in which the highest is from the building industry (4.27) and the lowest is from the traditional manufacturing industry (4.07). The building industry gives the lowest score to medical care, at 3.98 points.

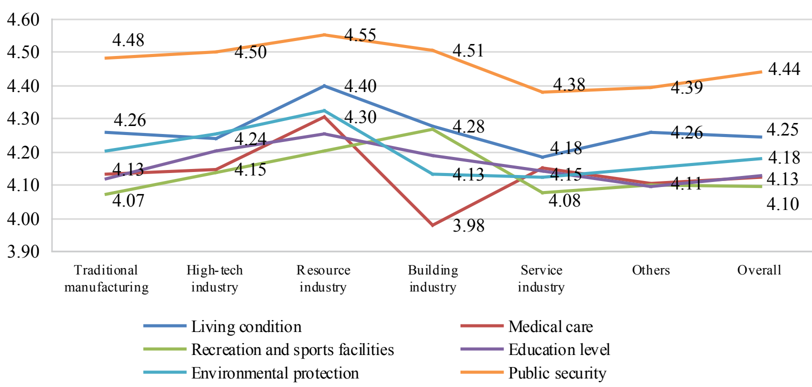

Chart 2-13 Evaluation of living environment sub-indicators in different industries

（四）生活服务环境评价总体提升

从企业评价均值看，2018 年受访企业对生活服务环境评价为 4.10 分，2019 年提升为 4.243 分，2019 年比 2018 年提高 0.143 分。

1. 与 2018 年相比，2019 年各项指标均有不同程度提升。

在生活服务环境细分指标中，文体设施评价分值提升最大（0.22 分），医疗卫生和居住条件次之，分别为 0.17 分、0.14 分；环境保护评价提升幅度较小，为 0.05 分。

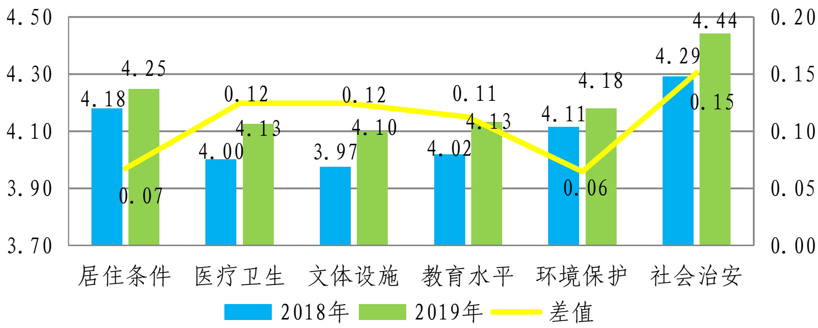

图2-14 生活服务环境细分指标年度评价对比图

2. 东、西部企业评价提升较快，中部有所下降。

地区评价呈 V 型特征。与 2018 年相比，2019 年东部和西部企业评价提升均较快，提高分值均大于 0.10 分，而中部企业评价出现下降，由 2018 年的 4.26 分降至 2019 年的 4.21 分。

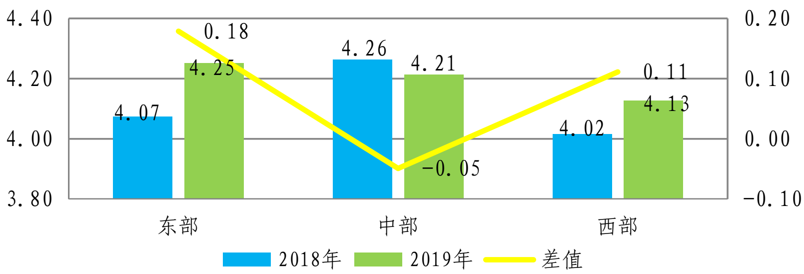

图2-15 生活服务环境不同地区年度评价对比图

3. 资源行业、服务行业评价有较大幅度提升。

从行业角度看，与 2018 年相比，2019 年所有行业均呈现不同程度的提升。其中，资源行业、服务行业评价提升均超 0.20 分，其余行业均低于 0.20 分；资源行业提升最明显，由 2018 年的 4.12 分提至 2019 年的 4.38 分，提高了 0.26 分；建筑业提升幅度相对较小，由 2018 年的 4.09 分提升至 2019 年的 4.17 分，仅提高 0.08 分。

(4) The overall evaluation of living environment has improved.

Seen from the average value of enterprise evaluations, living environment received a score of 4.10 points in 2018, and in 2019, it has increased to 4.243, a rise of 0.143 points.

1. Compared with 2018, evaluations of the indicators in 2019 have increased to different degrees.

Among living environment sub-indicators, recreation and sports facilities has the biggest increase of 0.22 points, followed by medical care and living condition, by 0.17 points and 0.14 points respectively. Environmental protection has a slight increase, by 0.05 points.

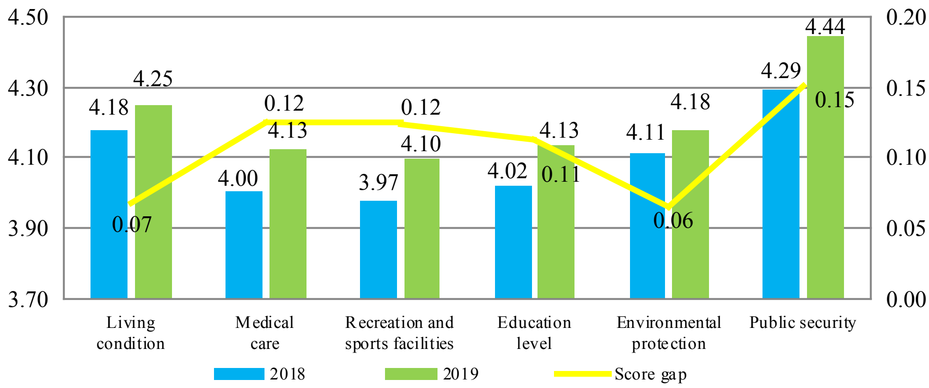

Chart 2-14 Comparison of annual evaluation of living environment sub-indicators

2. Evaluations by the eastern and western areas have improved rapidly, and that by the central area has declined.

Regional evaluations show a V shape. Compared with 2018, the evaluations by enterprises in the eastern and western areas have increased rapidly in 2019, both by more than 0.10 points, while the evaluation by the central area has declined from 4.26 points in 2018 to 4.21 points in 2019.

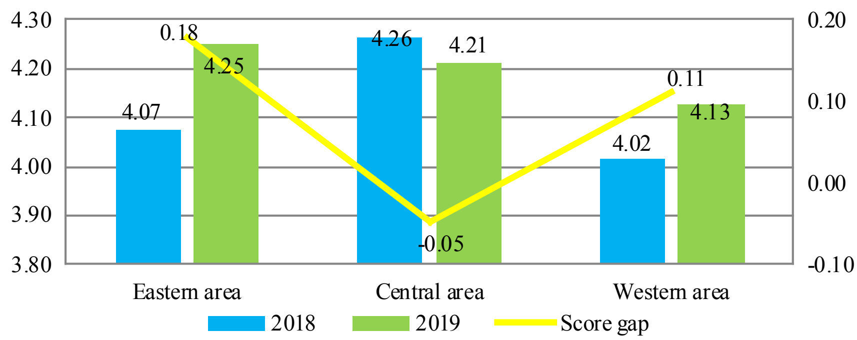

Chart 2-15 Comparison of annual evaluation of living environment in different areas

3. Evaluations by the resource industry and service industry have greatly improved.

From an industry perspective, compared with 2018, all industries give higher scores to different degrees in 2019. Both resource industry and service industry evaluations have increased by more than 0.20 points, and the rest of the industries are all below 0.20 points. The resource industry presents the most obvious increase, from 4.12 points in 2018 to 4.38 points in 2019, an increase of 0.26 points. The increase in the building industry is relatively small, from 4.09 points in 2018 to 4.17 points in 2019, only by 0.08 points.

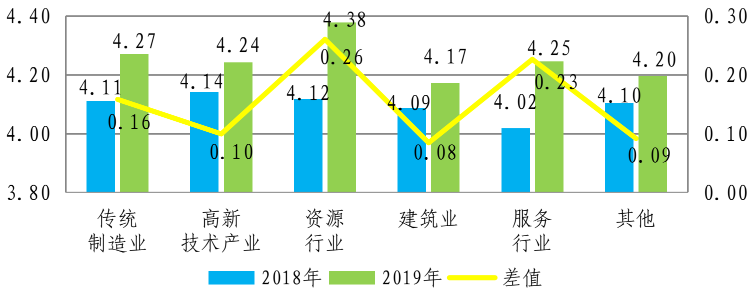

图2-16 生活服务环境不同行业年度评价对比图

三、政策政务环境优化成效明显

政策政务环境指标又细分为政策稳定性、政策执行力度、政策公平性、政策透明度、政策协同性、政府服务效率及官员廉洁程度七个二级指标。2019 年受访企业对政策政务环境总体评价较高，近九成企业对政策政务环境较满意及以上，资源行业和集体企业评价最高，与 2018 年相比，2019 年西部企业评价提升幅度最大。

（一）政策政务环境评价位居第四，官员廉洁程度受好评

政策政务环境总体评价为 4.363 分，在 12 个一级指标中位居第四，高于营商环境总体评价。从政策政务环境细分指标看，各项评价均高于 4.25 分。其中，官员廉洁程度评价最高，为 4.43 分；政策稳定性和政府服务效率次之（分别为 4.36 分、4.33 分）；政策公平性和政策协同性均为 4.30 分，政策执行力度和政策透明度最低，均为 4.28 分。

图2-17 政策政务环境细分指标评价图

从企业满意度评价看，近九成受访企业对政策政务环境的评价为较满意及以上（88.20%），各项细分指标满意度较均衡且均高于八成。其中，官员廉洁程度较满意及以上占比最高（89.80%），政策稳定性次之（87.60%），政府服务效率居中（86.50%），政策协同性较低（84.30%），政策透明度最低（83.00%）。

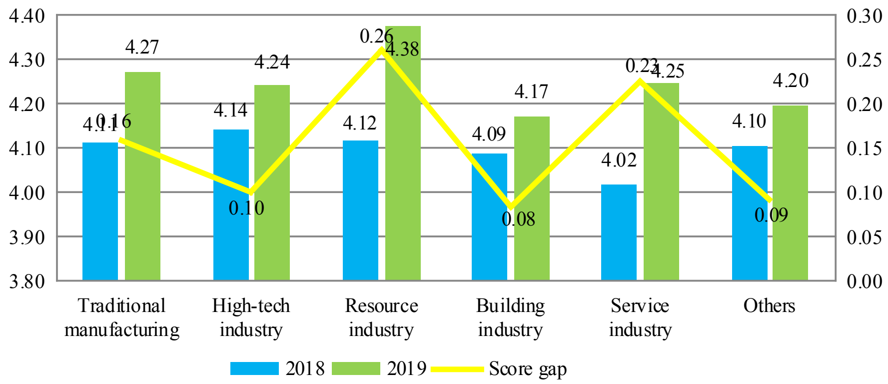

Chart 2-16 Comparison of annual evaluation of living environment in different industries

III.Policy and government environment is significantly optimized

Policy and government environment sub-indicators include the seven secondary indicators of policy stability, policy execution, policy fairness, policy transparency, policy coordination, government service efficiency, and integrity of government officials. In 2019, the surveyed enterprises have a high overall evaluation of the policy and government environment. Nearly 90% of enterprises are satisfied and more than satisfied with the policy and government environment, and the resource industry and collectively-owned enterprises give the highest scores. Compared with 2018, the evaluation by enterprises in the western area in 2019 sees the largest improvement.

(1) Policy and government environment ranks fourth among first-level indicators, and official integrity is highly praised.

The overall score of policy and government environment is 4.363, ranking fourth among the 12 first-level indicators, higher than the overall score of the business environment in China. Among the sub-indicators of policy and government environment, all get a score above 4.25. Official integrity is the highest, at 4.43 points, followed by policy stability and government service efficiency (4.36 and 4.33 respectively). Both policy fairness and policy coordination are 4.30 points, and policy execution and policy transparency are the lowest, both at 4.28 points.

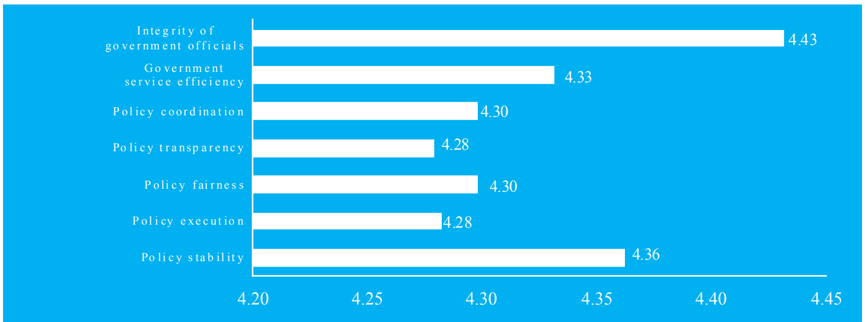

Chart 2-17 Evaluation of policy and government environment sub-indicators

From the perspective of satisfaction rate, nearly 90% of the surveyed enterprises consider policy and government environment satisfactory and above (88.20%), and satisfaction rates of all sub-indicators are balanced and higher than 80%. The satisfaction rate of official integrity is the highest (89.80%), followed by that of policy stability (87.60%). The satisfaction rate of government service efficiency is in the middle (86.50%), that of policy coordination is low (84.30%), and that of policy transparency is the lowest (83.00%).

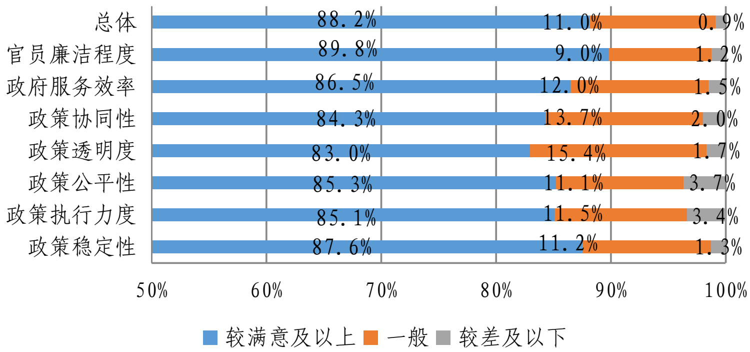

图2-18 政策政务环境细分指标满意度占比图

（二）地区评价呈东西部低、中部高特征

从地区角度分析，东中西部评价均高于 4.30 分，且呈现倒 V 型特征。其中，中部评价最高（4.45 分），西部居中（4.31 分），东部最低（4.30 分）。

从企业满意度看，中部地区企业满意度最高，较满意及以上企业占比高达 91.9%，且一般企业占比最低，仅为 6.8%；东、西部地区企业满意度略低，较满意及以上占比均低于 90%，分别为 87.0%、87.2%，一般企业占比均超 10%。

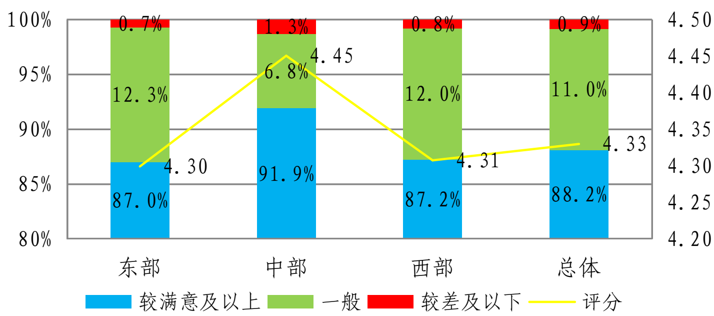

图2-19 各地区对政策政务环境综合评价图

从政策政务环境细分指标看，各地区评价均较高，中部企业评价均超 4.40 分，其中对政策稳定性评价最高，为 4.49 分，接近“非常满意”水平；东部企业对政策稳定性、政策公平性、政策透明度及政府服务效率评价均为最低，分别为 4.32 分、4.26 分、4.24 分和 4.30 分；西部企业对政策执行力度、政策协同性和官员廉洁程度评价最低，分别为 4、23 分、4.26 分和 4.35 分。从细分指标看，各地区对政策执行力度评价差异最大，其中，中部评价最高（4.43 分），西部最低（4.23 分），相差 0.20 分。

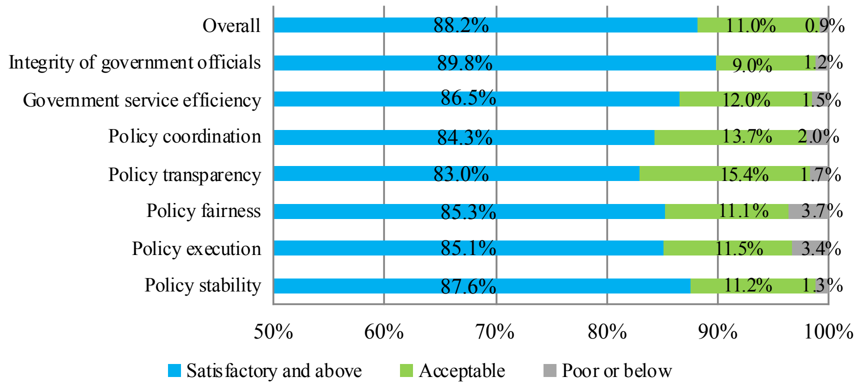

Chart 2-18 Proportion of satisfaction rate of policy and government environment sub-indicators

(2) The central area gives a high evaluation and the eastern and western areas give low evaluations.

On the basis of areas, eastern, central and western areas all give a score above 4.30, and show an inverted V shape. The central area's evaluation is the highest (4.45 points), the western area's is in the middle (4.31 points), and the eastern area's is the lowest (4.30 points).

From the perspective of satisfaction rate, enterprises in the central area are the most satisfied, with 91.9% of them considering policy and government environment satisfactory and above and only 6.8% of them considering it fair, the lowest proportion. The satisfaction rates in eastern and western areas are slightly lower, both below 90%, and respectively at 87.0% and 87.2%. Over 10% of enterprises in eastern and western areas think it fair.

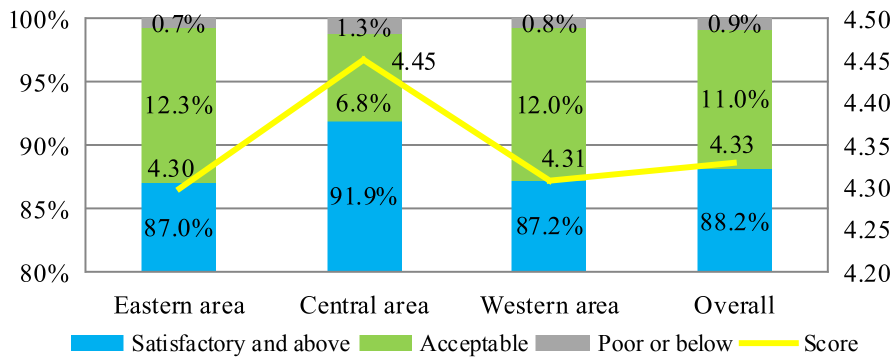

Chart 2-19 Comprehensive evaluation of policy and government environment in different areas

Seen from policy and government environment sub-indicators, the evaluations by all areas are high, and the evaluations by central area enterprises all exceed 4.40 points, among which the evaluation of policy stability is the highest, which is 4.49 points, close to "very satisfactory". Evaluations of policy stability, policy fairness, policy transparency, and government service efficiency are the lowest in the eastern area, at 4.32, 4.26, 4.24 and 4.30 respectively. Western area enterprises give policy execution, policy coordination and official integrity the lowest scores, respectively at 4.23, 4.26 and 4.35. From the perspective of sub-indicators, the evaluations of policy execution vary greatly in different areas. The central area gives the highest (4.43 points) and the western area the lowest (4.23 points), a difference of 0.20 points.

表 2-3 各地区对政策政务环境细分指标的评价

排序	政策稳定性		政策执行力度		政策公平性		政策透明度		政策协同性		政府服务效率		官员廉洁程度	
	地区	得分	地区	得分	地区	得分	地区	得分	地区	得分	地区	得分	地区	得分
1	中部	4.49	中部	4.43	中部	4.42	中部	4.42	中部	4.43	中部	4.45	中部	4.48
2	西部	4.34	东部	4.25	西部	4.28	西部	4.24	东部	4.27	西部	4.30	东部	4.46
3	东部	4.32	西部	4.23	东部	4.26	东部	4.24	西部	4.26	东部	4.30	西部	4.35

（三）资源行业评价最高，建筑业、服务行业满意度最低

从行业角度看，各行业评价差异较大，其中，资源行业评价最高（4.44 分），接近“非常满意”水平；传统制造业次之（4.41 分），高新技术产业居中（4.39 分），建筑业评价较低（4.23 分）；服务行业最低（4.15 分），与最高比相差 0.29 分。

从企业满意度评价看，各行业差异较大，大部分行业较满意及以上企业占比均超八成。其中，资源行业满意度最高，较满意及以上企业占比超九成（93.20%）；建筑业满意度最低，较满意及以上企业占比不足八成（78.00%），且评价一般的企业占比最高（19.8%）。

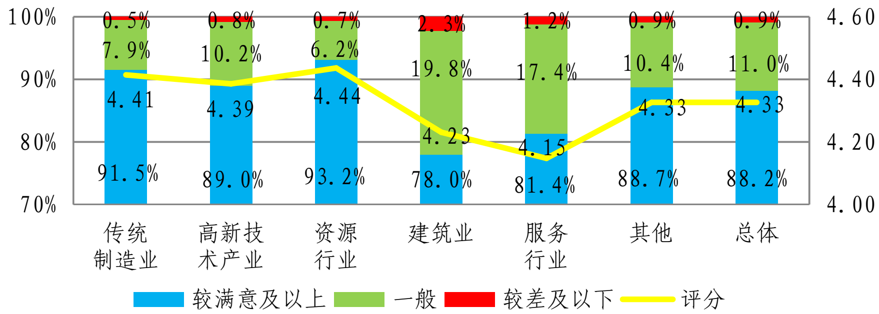

图2-20 不同行业对政策政务环境的满意占比图

从政策政务环境细分指标看，各行业对官员廉洁程度评价均超 4.30 分，其中大部分行业超 4.40 分，接近“非常满意”水平；传统制造业、高新技术产业和资源行业对各项细分指标评价均超 4.30 分，其中资源行业均超 4.40 分。建筑业对政策政务环境各项细分指标评价差异最大，最高与最低相差 0.36 分；资源行业对各项细分指标评价差异最小，最高与最低仅相差 0.07 分。

Table 2-3 Evaluation of policy and government environment sub-indicators in different areas

Ranking	Policy stability		Policy execution		Policy fairness		Policy transparency		Policy coordination		Government service efficiency		Integrity of government officials	
	Area	Score	Area	Score	Area	Score	Area	Score	Area	Score	Area	Score	Area	Score
1	Central area	4.49	Central area	4.43	Central area	4.42	Central area	4.42	Central area	4.43	Central area	4.45	Central area	4.48
2	Western area	4.34	Eastern area	4.25	Western area	4.28	Western area	4.24	Eastern area	4.27	Western area	4.30	Eastern area	4.46
3	Eastern area	4.32	Western area	4.23	Eastern area	4.26	Eastern area	4.24	Western area	4.26	Eastern area	4.30	Western area	4.35

(3) The resource industry gives the highest evaluation, and the building industry and service industry are the least satisfied.

From an industry perspective, the evaluations by various industries are quite different. The resource industry gives the highest score (4.44 points), close to “very satisfactory”, followed by traditional manufacturing (4.41 points). The high-tech industry is in-between (4.39 points), the building industry gives a lower evaluation (4.23 points), and the service industry gives the lowest (4.15 points), a gap of 0.29 points with the highest score.

From the perspective of satisfaction rate, industries show big differences. The satisfaction rates in most industries are above 80%. The resource industry has the highest satisfaction rate, with over 90% of the enterprises in this industry rating policy and government environment as satisfactory and above (93.20%). The building industry is the least satisfied, with a satisfaction rate of less than 80% (78.00%), and the proportion of enterprises considering it fair is the highest (19.8%).

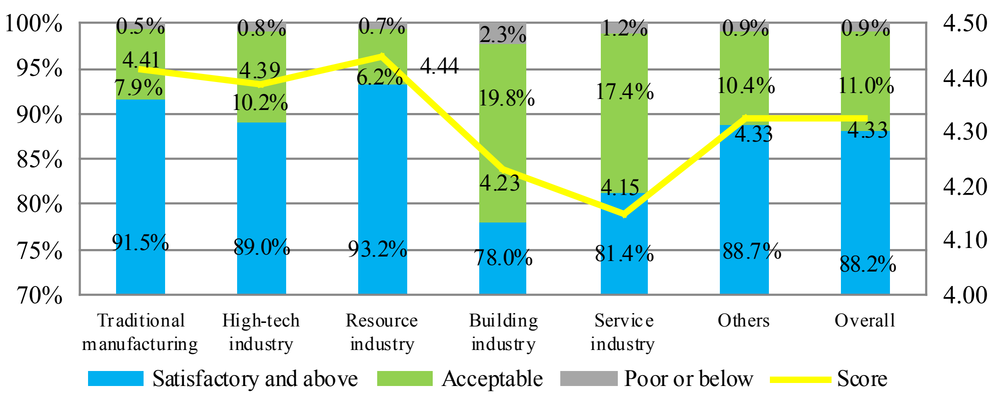

Chart 2-20 Proportion of satisfaction rate of policy and government environment in different industries

Among policy and government environment sub-indicators, official integrity gets a score above 4.30 in all industries, and most of the industries give it a score above 4.40 points, close to “very satisfactory”. Traditional manufacturing, high-tech industry and resource industry give a score above 4.30 to all sub-indicators, and the scores of the sub-indicators given by the resource industry have all exceeded 4.40. The building industry gives very different scores to the sub-indicators, with the gap between the highest and the lowest at 0.36 points. The resource industry gives balanced scores to the sub-indicators, with the gap between the highest and the lowest at only 0.07 points.

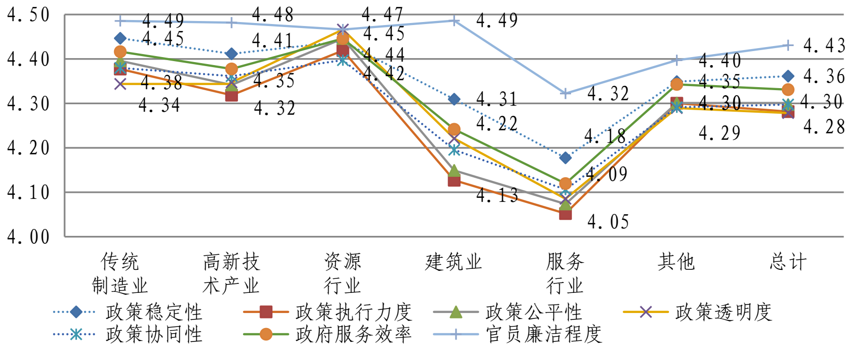

图2-21 不同行业对政策政务环境细分指标的评价图

（四）政策政务环境评价普遍提高但提升幅度较小

动态看，2018 年受访企业对政策政务环境评价为 4.300 分，2019 年评价略有提升，为 4.363 分。

1. 与 2018 年相比，2019 年大部分细分指标均有小幅提升。

与 2018 年相比，政策政务环境各项细分指标评价虽均有提升，但大部分指标提升幅度较小，除官员廉洁程度提升 0.12 分外，其余均低于 0.10 分，政策透明度提升幅度最小，由 2018 年 4.25 分提至 2019 年的 4.27 分，仅提高 0.02 分。

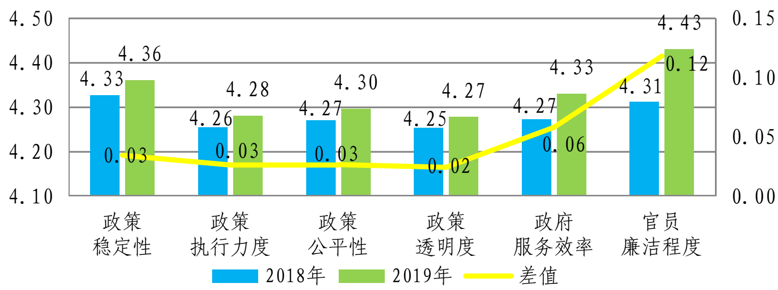

图2-22 政策政务环境细分指标评价年度对比图

2. 各地区对政策政务环境评价较稳定，均有提升但幅度不大。

与 2018 年相比，2019 年各地区评价均较稳定，且提升幅度较小。其中，西部提升

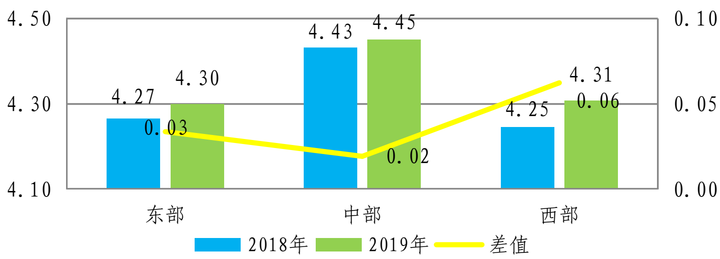

图2-23 政策政务环境不同地区年度评价对比图

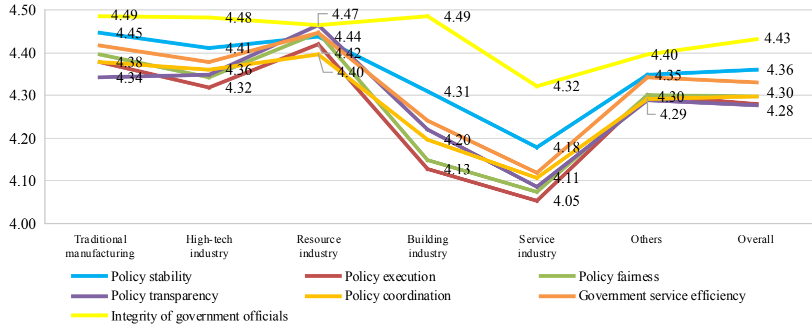

Chart 2-21 Evaluation of policy and government environment sub-indicators in different industries

(4) The overall evaluation of policy and government environment has improved, but in a small range.

Dynamically, in 2018, the surveyed enterprises gave 4.300 points to policy and government environment , and the score has slightly increased in 2019, to 4.363 points.

1. Compared with 2018, evaluations of most of the sub-indicators in 2019 have slightly increased.

Compared with 2018, although the evaluations of the sub-indicators of policy and government environment have improved, most are a small-range increase. Except the increase of 0.12 points in official integrity, the rest are below 0.10 points, and policy transparency sees the smallest increase, from 4.25 points in 2018 to 4.27 points in 2019, only by 0.02 points.

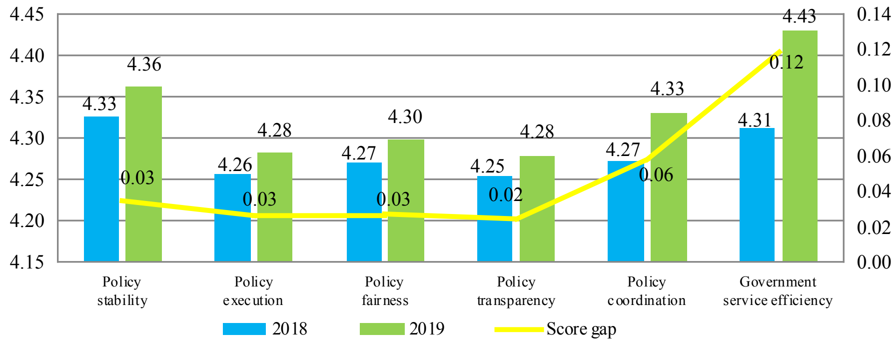

Chart 2-22 Comparison of annual evaluation of policy and government environment sub-indicators

2. Evaluations of policy and government environment in different areas are relatively stable, all with small-range increases.

Compared with 2018, the evaluations in different areas are relatively stable, with small-range increases in 2019. The western area sees the biggest increase, only by 0.06 points, and the central area sees the smallest

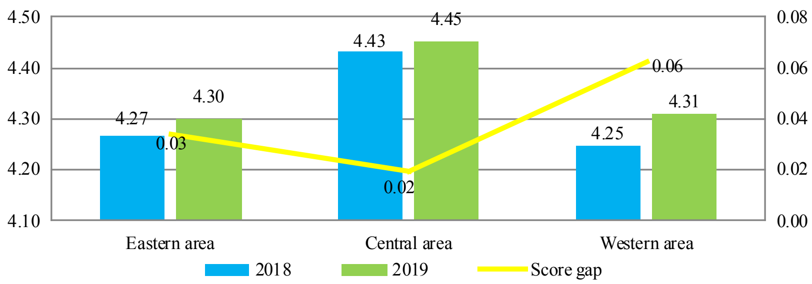

Chart 2-23 Comparison of annual evaluation of policy and government environment in different areas

幅度最大，仅提升 0.06 分；中部提升幅度最小，仅为 0.02 分。

3. 多数行业评价提升，其他行业评价下降。

从行业角度分析，2019 年与 2018 年相比，资源行业由 2018 年的 4.23 分提升至 2019 年的 4.45 分，提升 5.20%，提升幅度最大（0.22 分）；服务行业评价提升 0.13 分，其余行业评价提升均低于 0.10 分；其他行业是唯一出现评价下降的行业，由 2018 年的 4.33 分降至 2019 年的 4.32 分。

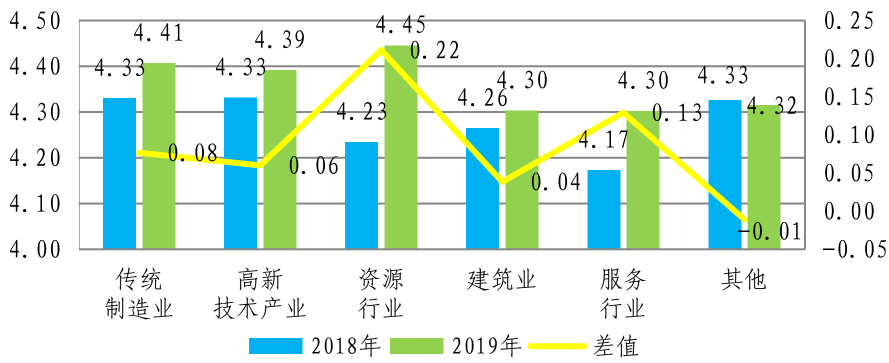

图2-24 政策政务环境不同行业年度评价对比图

四、社会信用环境改善明显

社会信用环境细分为社会信用度、征信体系建设、信用信息公示系统建设及失信惩戒、守信奖励机制四个二级指标。2019 年受访企业对社会信用环境总体评价较好，总体排名居前列；各地区评价均较高，中部地区企业满意度超九成；中部、资源行业评价最高，行业评价呈阶梯式分布。

（一）总体评价位列第三，征信体系建设评价最高

社会信用环境总体评价较高（4.386 分），综合排名位于口岸服务、财税服务之后，在 12 个一级指标中排第三，高于营商环境总体评价。从社会信用环境细分指标看，各项指标评价均较高。其中，企业对征信体系建设评价最高（4.37 分），社会信用度评价次之（4.36 分），信用信息公示系统建设评价居中（4.34 分），失信惩戒、守信奖励机制建设评价最低（4.27 分）。

increase, only by 0.02 points.

3. Evaluations by most industries have improved, and the evaluation by other industries has declined.

From an industry perspective, compared with 2018, the score given by the resource industry has increased from 4.23 points in 2018 to 4.45 points in 2019, an increase of 5.20%, the largest increase (0.22 points). The score by the service industry has increased by 0.13 points, and the increases in the scores by the rest industries are all below 0.10 points. Other industries are the only industries with a declining evaluation, from 4.33 in 2018 to 4.32 in 2019.

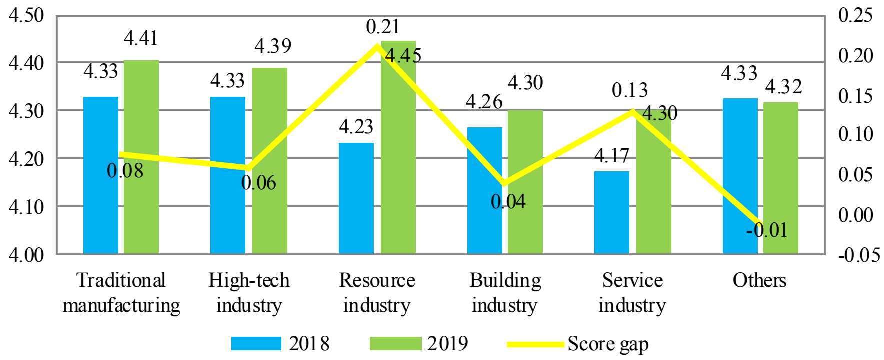

Chart 2-24 Comparison of annual evaluation of policy and government environment in different industries

IV. Social credit environment has significantly improved

Social credit environment sub-indicators include the four secondary indicators of social credibility, credit information system, credit information disclosure system, and honesty reward and dishonesty punishment mechanism. In 2019, the surveyed enterprises have a good evaluation of the overall social credit environment, ranking among the top in overall ranking. Evaluations in all areas are high, and the satisfaction rate is above 90% in central area enterprises. The central area and the resource industry give the highest evaluations, and industry evaluations show a tiered distribution pattern.

(1) The overall evaluation ranks third, and the evaluation of credit information system is the highest.

The overall score of social credit environment is relatively high (4.386 points), ranking after port service and fiscal and tax services, which is the third place among the 12 first-level indicators, higher than the overall score of China's business environment. Seen from the sub-indicators of social credit environment, all sub-indicators get a relatively high score. Credit information system gets the highest evaluation (4.37 points), followed by social credibility (4.36 points). Credit information disclosure system is in the middle (4.34 points), and honesty reward and dishonesty punishment mechanism gets the lowest score (4.27 points).

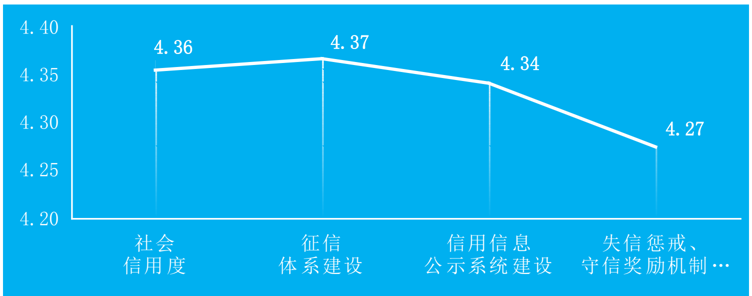

图2-25 社会信用环境细分指标评价图

从企业满意度看，社会信用环境满意度较高，较满意及以上企业占比近九成(87.90%)。从细分指标看，各项指标较满意及以上企业占比均超八成。其中，社会信用度满意度最高，较满意及以上占比达 87.20%；失信惩戒、守信奖励机制建设占比最低，仅 83.80%。

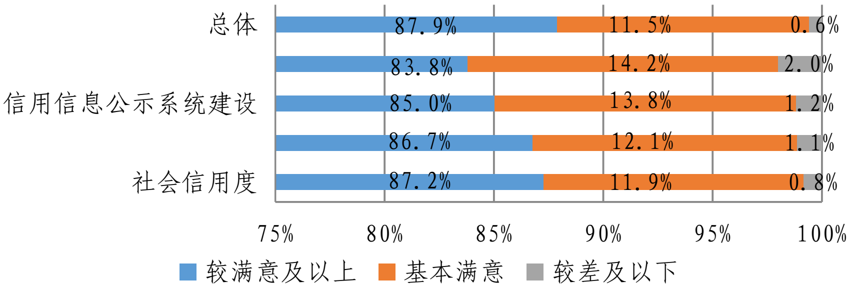

图2-26 社会信用环境细分指标满意占比图

（二）中部评价最高，较满意及以上企业占比超九成

从社会信用环境评价均值看，各地区评价均较高。其中，中部最高，达 4.42 分，接近“非常满意”水平；东部居中，为 4.33 分；西部较低，为 4.29 分。

从企业满意度评价看，中部满意度最高，较满意及以上企业占比超九成（91.30%）；东部次之，企业占比为 88.0%；西部略低，但仍达 85.2%。

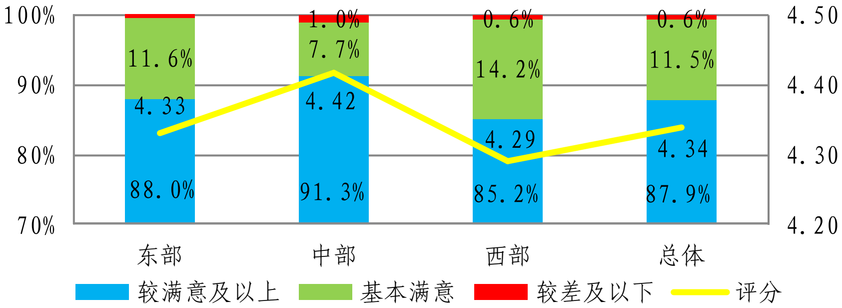

图2-27 各地区对社会信用环境综合评价图

从社会信用环境细分指标看，中部企业对各项指标评价均为最高，其中，对征信体

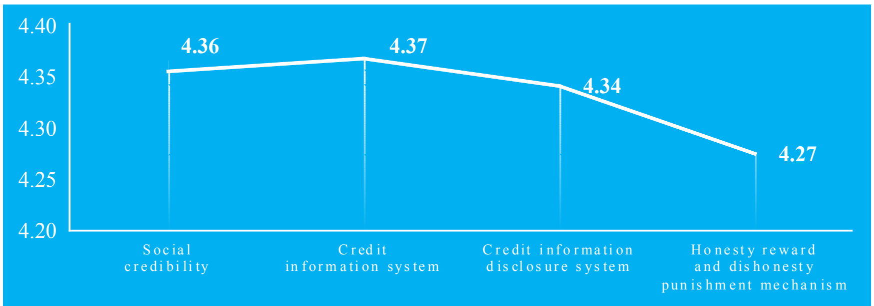

Chart2-25 Evaluation of social credit environment sub-indicators

From the perspective of satisfaction rate, social credit environment enjoys a relatively high satisfaction rate of nearly 90% (87.90%). For the sub-indicators, the satisfaction rate of each sub-indicator is over 80%. Social credibility has the highest satisfaction rate of 87.20%, and honesty reward and dishonesty punishment mechanism has the lowest, at only 83.80%.

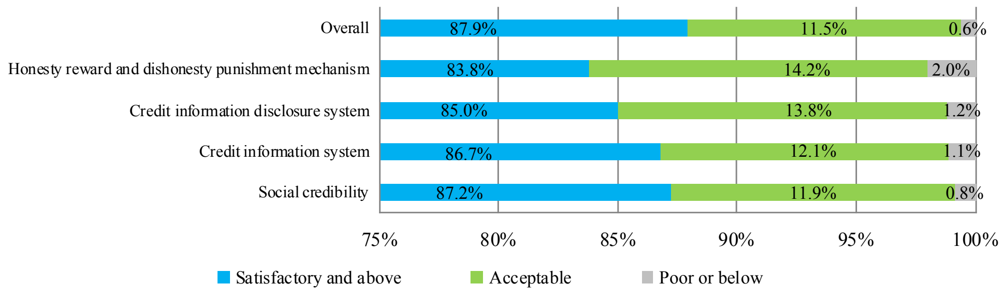

Chart 2-26 Proportion of satisfaction rate of social credit environment sub-indicators

(2) The central area gives the highest evaluation, with a satisfaction rate of over 90%.

Based on the average value of social credit environment evaluations, all areas give high evaluations. The central area gives the highest score, reaching 4.42 points, close to "very satisfactory", the eastern area is in-between, at 4.33 points, and the western area gives the lowest, at 4.29 points.

From the perspective of satisfaction rate, the central area is the most satisfied, with over 90% of enterprises rating social credit environment as satisfactory and above (91.30%), followed by the eastern area at 88.0%, and the western area has the lowest satisfaction rate, but still at 85.2%.

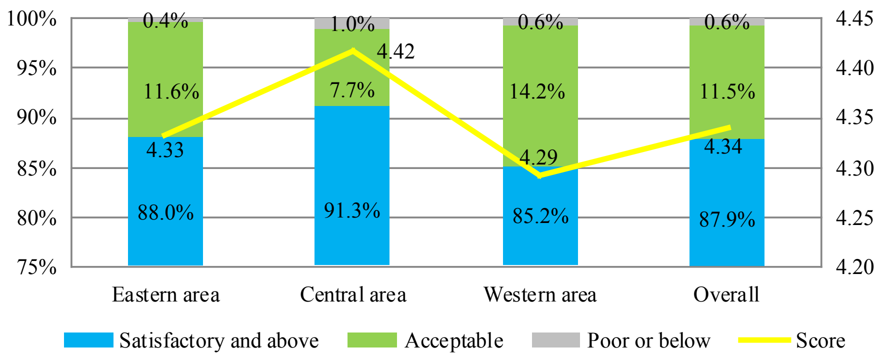

Chart 2-27 Comprehensive evaluation of social credit environment in different areas

For the sub-indicators of social credit environment, the central area gives the highest scores to all the sub-indicators, among which credit information system and credit information disclosure system get the highest

系建设和信用信息公示系统建设评分最高（均为 4.45 分）；东部企业对社会信用度评价较低（4.34 分），西部企业对其余细分指标均为最低，其中，对失信惩戒、守信奖励机制建设评分最低（4.18 分）。

表 2-4 各地区对社会信用环境细分指标的评价

排名	社会信用度		征信体系建设		信用信息公示系统建设		失信惩戒、守信奖励机制建设		社会信用环境
	地区	得分	地区	得分	地区	得分	地区	得分	
1	中部	4.42	中部	4.45	中部	4.45	中部	4.35	中部
2	西部	4.34	东部	4.35	东部	4.34	东部	4.30	东部
3	东部	4.34	西部	4.34	西部	4.28	西部	4.18	西部

（三）行业评价呈现三个层级，不同行业企业满意度差异较大

从行业角度看，各行业评价层级明显（4.17 分 -4.46 分）。其中，资源行业评价最高（4.46 分），传统制造业次之（4.45 分），居第一层级；高新技术产业（4.36 分）、其他行业（4.32 分）和建筑业（4.29 分）评价居中，位于第二层级；服务行业（4.17 分）评价较低，位于第三层级。

从企业满意度看，各行业评价差异较大。其中，传统制造业较满意及以上企业占比高达 92.60%，满意度最高；资源行业次之，较满意及以上企业占比也超九成，达 92.00%；其余行业较满意及以上占比均低于九成，建筑业最低，较满意及以上企业占比不足八成，仅为 77.70%，与最高值相差 14.9 个百分点。

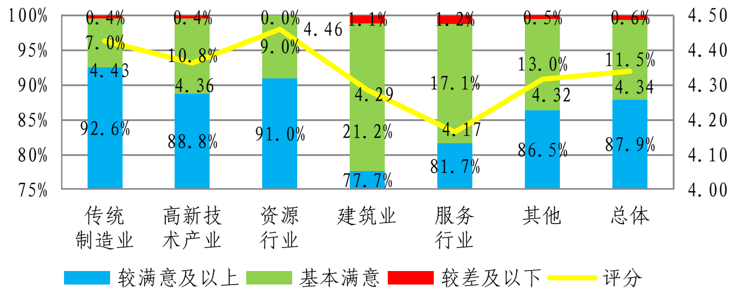

图2-28 不同行业对社会信用环境的满意度占比图

从社会信用环境细分指标看，各行业差异较大，资源行业对各项指标评价均为最高，其中对社会信用度评分最高（4.53 分），属于“非常满意”水平；服务行业对各项指标评价均为最低，其中对失信惩戒、守信奖励机制建设的评价为 4.12 分，与最高值相差 0.41 分。在各细分指标中，大部分行业对失信惩戒、守信奖励机制建设的评价均为最低。

scores (both at 4.45 points). The eastern area gives a lower evaluation to social credibility (4.34 points), and the western area gives the lowest scores to the rest sub-indicators, among which honesty reward and dishonesty punishment mechanism gets the lowest score (4.18 points).

Table 2-4 Evaluation of social credit environment sub-indicators in different areas

Ranking	Social credibility		Credit information system		Credit information disclosure system		Honesty reward and dishonesty punishment mechanism		Social credit environment
	Area	Score	Area	Score	Area	Score	Area	Score	
1	Central area	4.42	Central area	4.45	Central area	4.45	Central area	4.35	Central area
2	Western area	4.34	Eastern area	4.35	Eastern area	4.34	Eastern area	4.30	Eastern area
3	Eastern area	4.34	Western area	4.34	Western area	4.28	Western area	4.18	Western area

(3) Industry evaluations are distributed in three tiers, and satisfaction rates in different industries are quite different.

From an industry perspective, evaluations by different industries are clearly distributed in different tiers (4.17 points-4.46 points). The resource industry gives the highest evaluation (4.46 points), followed by the traditional manufacturing industry (4.45 points), both ranking in the first tier. The high-tech industry gives 4.36 points, other industries give 4.32 points and the building industry gives 4.29 points, which are in the second tier. The service industry gives a low score of 4.17 points, ranking in the third tier.

From the perspective of satisfaction rate, industries are quite different. The traditional manufacturing industry has a satisfaction rate of 92.60%, which is the highest. The resource industry comes second with a satisfaction rate over 90%, reaching 92.00%. The rest industries have a satisfaction rate under 90%, with the building industry having the lowest, which is less than 80%, at only 77.70%, 14.9 percentage points lower than the highest value.

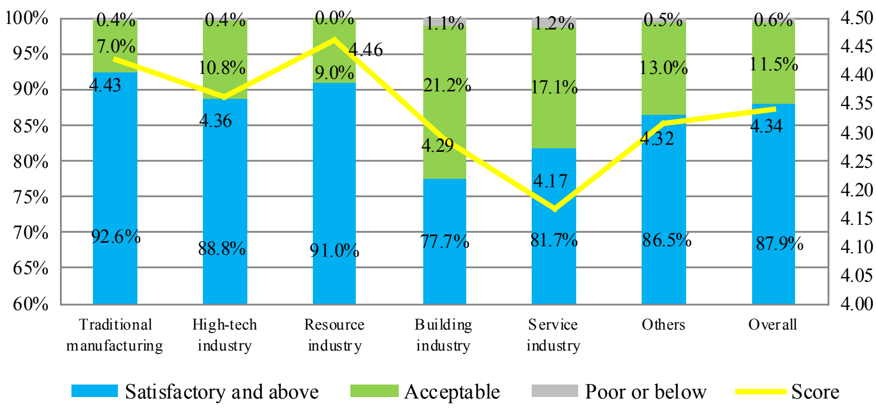

Chart 2-28 Proportion of satisfaction rate of social credit environment in different industries

In terms of social credit environment sub-indicators, industries give quite different evaluations. The resource industry gives the highest evaluations to all the sub-indicators, among which social credibility gets the highest (4.53 points), which means “very satisfactory”. The service industry gives the lowest scores to all the sub-indicators, in which honesty reward and dishonesty punishment mechanism gets 4.12 points, 0.41 points away from the highest value. Among the various sub-indicators, honesty reward and dishonesty punishment mechanism gets the lowest scores from most industries.

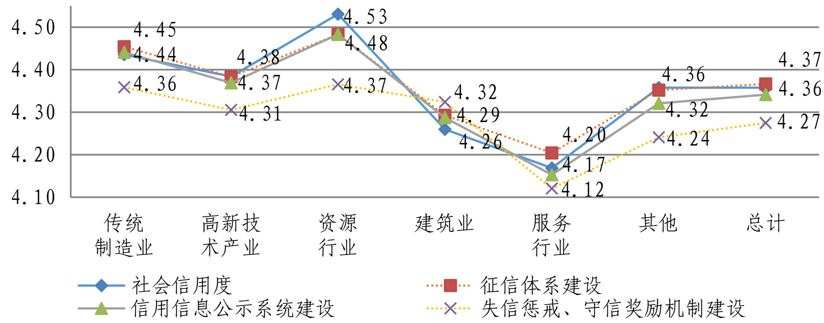

图2-29 不同行业对社会信用环境细分指标的评价图

（四）社会信用环境平稳发展，各地均给予较高评价

动态看，2018 年受访企业对社会信用环境总体评价为 4.260 分，2019 年为 4.386 分，提高 0.126 分，在一级指标中排名保持不变。

1. 与 2018 年相比，2019 年各项细分指标略有提升。

从社会信用环境细分指标看，与 2018 年相比，2019 年均有小幅提升。其中，失信惩戒、守信奖励机制建设提高 0.11 分，提升幅度最大，其余指标提升分值均低于 0.10 分，社会信用度仅提升 0.05 分。

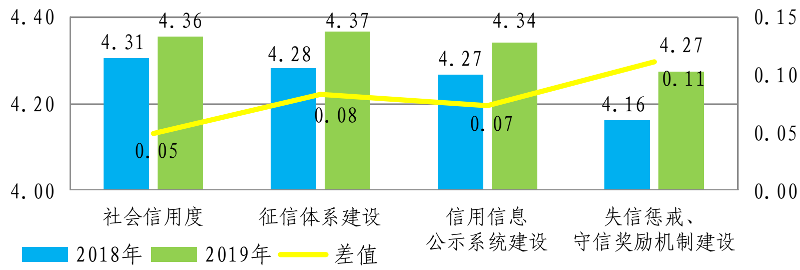

图2-30 社会信用环境细分指标年度评价对比图

2. 西部提升最快，中部提升幅度较小，但评价仍居首位。

从地区角度看，各地区企业评价均有提升。其中，西部进步最快，由 2018 年的 4.18 分提至 2019 年的 4.29 分，提高 0.12 分；中部提升较慢，仅提高 0.04 分，但 2019 年的

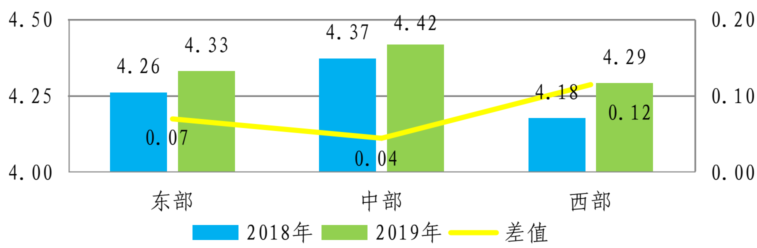

图2-31 社会信用环境不同地区年度评价对比图

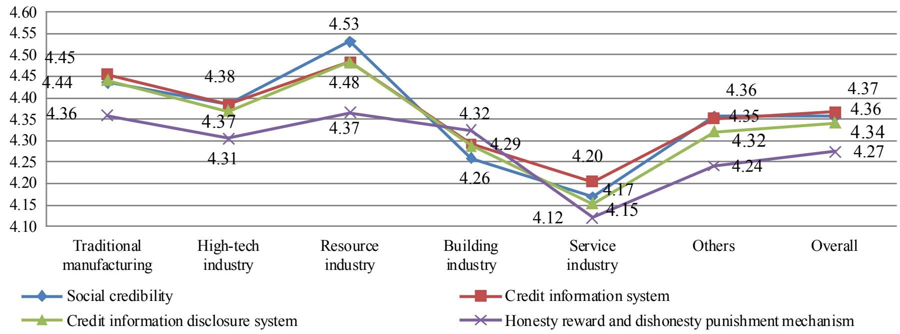

Chart2-29 Evaluation of social credit environment sub-indicators in different industries

(4) Social credit environment is developing steadily, and all areas have given high evaluations.

Dynamically, the overall evaluation of social credit environment by the surveyed enterprises in 2018 was 4.260, and has increased to 4.386 in 2019, an increase of 0.126. Social credit environment remains unchanged in the ranking of first-level indicators.

1. Compared with 2018, evaluations of the sub-indicators in 2019 have slightly improved.

From the perspective of social credit environment sub-indicators, compared with 2018, there has been a slight increase in 2019 in all the sub-indicators. Honesty reward and dishonesty punishment mechanism is up by 0.11 points, the largest increase. The rest sub-indicators are up by less than 0.10 points, and social credibility is only up by 0.05 points.

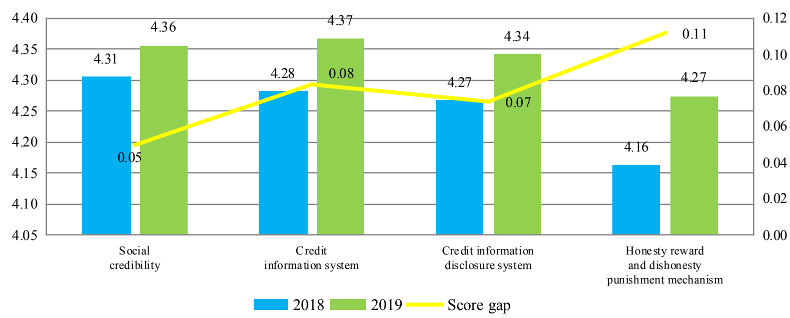

Chart 2-30 Comparison of annual evaluation of social credit environment sub-ndicators

2. The increase in the western area is the fastest and that in the central area is small, but the evaluation by the central area still tops that by other areas.

From a regional perspective, evaluations in all areas have improved. The western area sees the fastest progress, from 4.18 points in 2018 to 4.29 points in 2019, an increase of 0.12 points. The central area sees a slower increase, only by 0.04 points. However, the score given by the central area (4.42 points) in 2019 still ranks first.

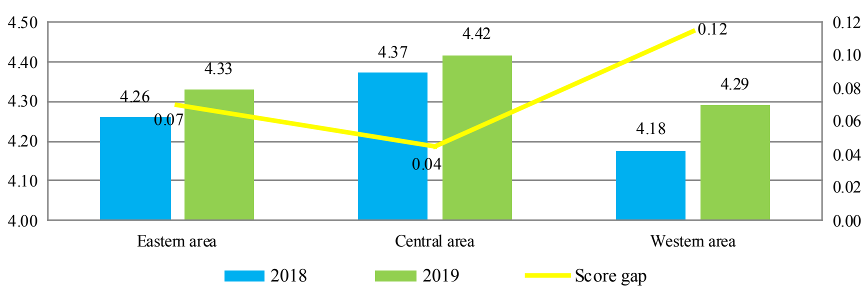

Chart 2-31 Comparison of annual evaluation of social credit environment in different areas

4.42 分的评价仍居首位。

3. 资源行业评价提升幅度较大，其他行业较小。

从行业角度看，与 2018 年相比，2019 年不同行业评价提升幅度差异较大。其中，资源行业提升最快（0.18 分），传统制造业和服务行业次之（均为 0.17 分）；其他行业较小（0.06 分）。

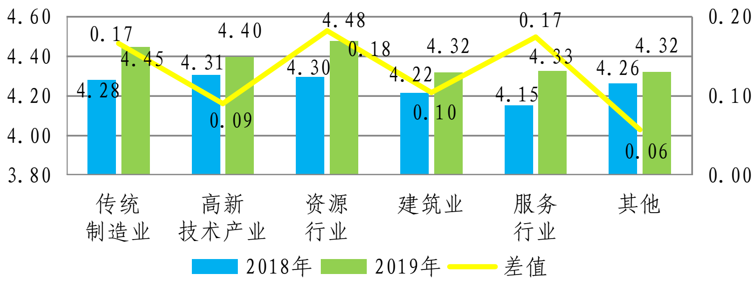

图2-32 社会信用环境不同行业年度评价对比图

五、公平竞争环境评价良好

公平竞争环境细分为市场监管、行政垄断治理、政府采购及市场准入四个二级指标。与 2018 年相比，2019 年受访企业对公平竞争环境评价有所提升，外商独资企业评价提升最明显。

（一）行政垄断治理评价最高，较满意及以上企业占比超过八成

在 12 个一级指标中，公平竞争环境总体评价居第七位（4.319 分），略高于营商环境总体评价。从公平竞争细分指标看，企业对各细项指标评价不低，其中，对行政垄断治理评价最高（4.37 分），市场监管次之（4.36 分），政府采购为 4.34 分，市场准入较低（4.27 分）。

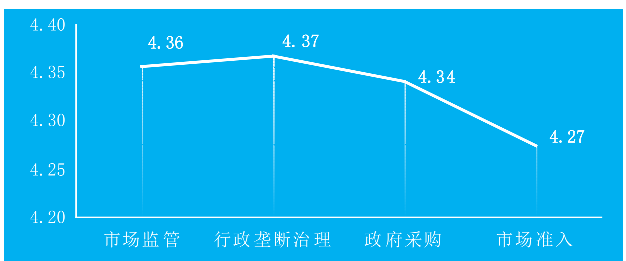

图2-33 公平竞争环境细分指标评价图

从企业满意度看，较满意及以上企业占比近九成（87.40%）。从细分指标看，各细分指标较满意及以上企业占比均超八成，其中，对市场监管满意度最高，较满意及以上企业占比为 86.60%；认为一般的企业占比均超一成，相对较高。

3. The evaluation by the resource industry has a large increase, and that by other industries has a smaller increase.

From an industry perspective, compared with 2018, improvements in the evaluations given by different industries in 2019 are quite different. The resource industry sees the fastest improvement (by 0.18 points), followed by traditional manufacturing and service industry (both by 0.17 points). The increase in other industries is small (by 0.06 points).

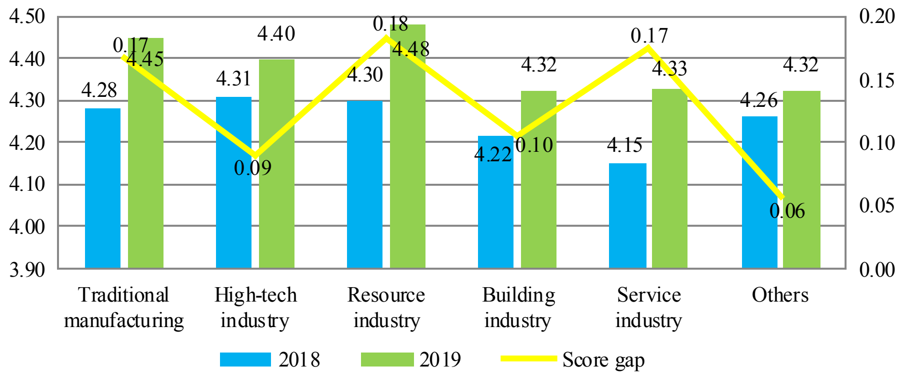

Chart 2-32 Comparison of annual evaluation of social credit environment in different industries

V. Fair competition environment receives favorable evaluation

Fair competition environment sub-indicators include the four secondary indicators of market regulation, administrative monopoly, government purchase and market access. Compared with 2018, the surveyed enterprises in 2019 have improved their evaluations of fair competition environment, and wholly foreign-owned enterprises contribute the most obvious increase.

(1) Administrative monopoly gets the highest evaluation, with a satisfaction rate of more than 80%.

Among the 12 first-level indicators, the overall score of fair competition environment ranks seventh (4.319 points), slightly higher than the overall score of the business environment in China. For fair competition sub-indicators, the evaluations are not low. Administrative monopoly gets the highest (4.37 points), market regulation comes second (4.36 points), government purchase is 4.34 points, and market access gets a low evaluation (4.27 points).

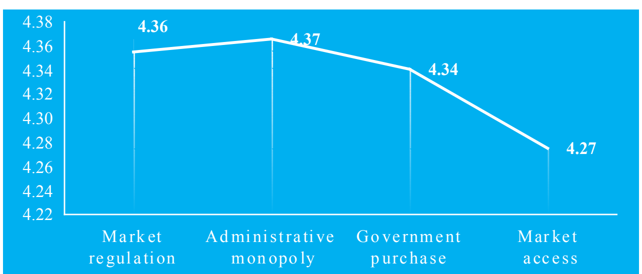

Chart 2-33 Evaluation of fair competition environment sub-indicators

From the perspective of satisfaction rate, nearly 90% (87.40%) of the surveyed enterprises are satisfied and more than satisfied. For the sub-indicators, the satisfaction rates all exceed 80%. Market regulation enjoys the highest satisfaction rate of 86.60%. The proportions of enterprises giving a “fair” evaluation exceed 10% for all the sub-indicators, which are relatively high.

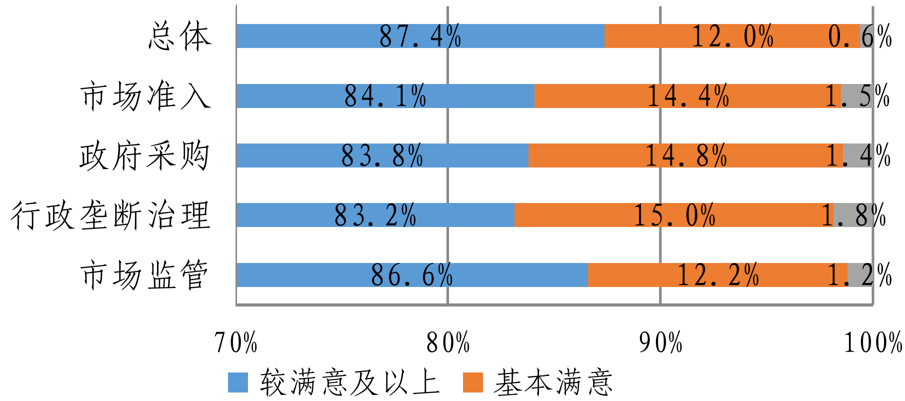

图2-34 公平竞争环境细分指标满意度占比图

（二）各地区评价良好，中部满意度超九成

从企业评价均值看，各地区评价均值均高于 4.20 分。其中，中部最高（4.37 分），东部居中（4.28 分），西部次之（4.23 分）。

从企业满意度看，较满意及以上企业占比均超八成。其中，中部超九成，高达 90.4%；东部次之，为 87.9%；西部略低，为 84.2%。

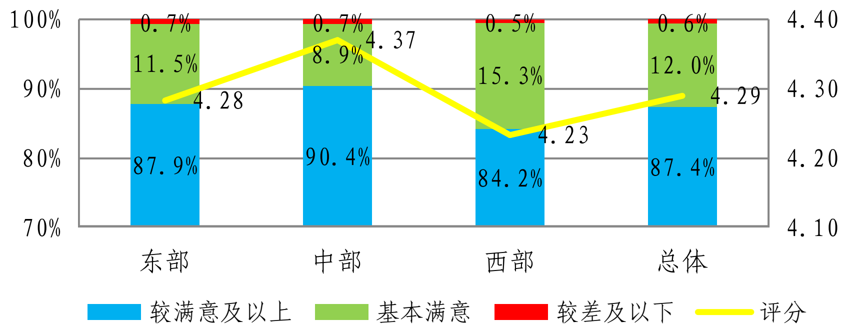

图2-35 各地区对公平竞争环境综合评价图

从公平竞争环境细分指标看，中部企业对各项细分指标评价均居首位，其中对市场监管评分最高（4.41 分）；东部企业在各二级指标中对市场监管评价最低（4.29 分）；西部企业对其他三项细分指标在各地区评价中均为最低（分别为 4.17 分、4.21 分、4.24 分）。

表 2-5 各地区对公平竞争环境细分指标的评价

排序	市场监管		行政垄断治理		政府采购		市场准入		公平竞争环境
	地区	得分	地区	得分	地区	得分	地区	得分	
1	中部	4.41	中部	4.33	中部	4.36	中部	4.38	中部
2	西部	4.29	东部	4.27	东部	4.30	东部	4.26	东部
3	东部	4.29	西部	4.17	西部	4.21	西部	4.24	西部

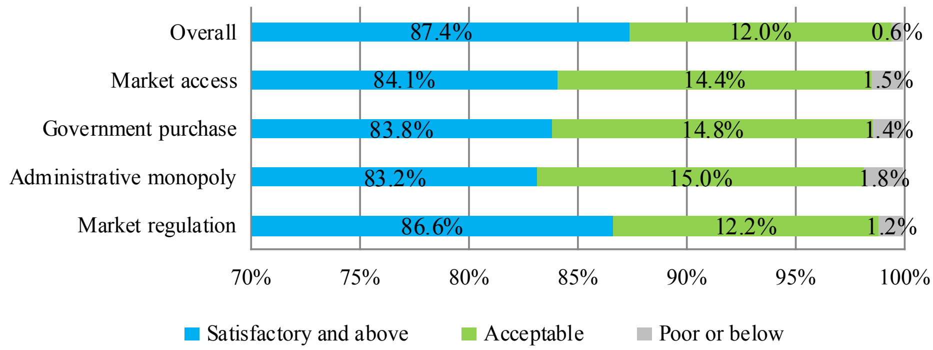

Chart 2-34 Proportion of satisfaction rate of fair competition environment sub-indicators

(2) The evaluation in each area is favorable, and the satisfaction rate in the central area is over 90%.

Based on the average value of evaluations, the average value in each region is higher than 4.20. The highest is in the central area (4.37 points), the mid-level score is in the eastern area (4.28 points), and the lowest is in the western area (4.23 points).

From the perspective of satisfaction rate, over 80% are satisfied and more than satisfied in all areas. The central area has a satisfaction rate over 90%, reaching 90.4%, followed by the eastern area at 87.9% and the western area at 84.2%.

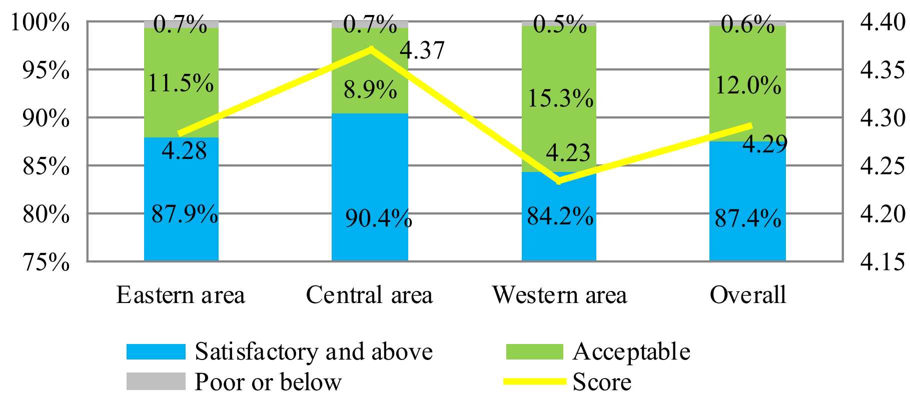

Chart 2-35 Comprehensive evaluation of fair competition environment in different areas

For fair competition sub-indicators, the central area gives the highest scores to all the sub-indicators, among which the highest one goes to market regulation (4.41 points). The eastern area gives the lowest evaluation to market regulation (4.29 points)). The western area gives the lowest scores to the other three sub-indicators among all regions (4.17 points, 4.21 points and 4.24 points respectively).

Table 2-5 Evaluation of fair competition environment sub-indicators in different areas

Ranking	Market regulation		Administrative monoploy		Government purchase		Market access		Fair competition environment
	Area	Score	Area	Score	Area	Score	Area	Score	
1	Central area	4.41	Central area	4.33	Central area	4.36	Central area	4.38	Central area
2	Western area	4.29	Eastern area	4.27	Eastern area	4.30	Eastern area	4.26	Eastern area
3	Eastern area	4.29	Western area	4.17	Western area	4.21	Western area	4.24	Western area

（三）行业评价差异较大，资源行业评价较高

从行业角度分析，各行业评价均值在4.12分-4.42分间。其中资源行业评价最高(4.42分)，接近“非常满意”水平；传统制造业和高新技术产业评价次之（分别为4.36分、4.33分）；服务行业评价较低（4.12分），与最高值相差0.30分。

从企业满意度看，各行业评价差异较大。其中，资源行业较满意及以上企业占比超九成(93.90%)，满意度最高；传统制造业次之(91.20%)；建筑业占比不足八成(75.60%)，与最高值相差18.3个百分点；其余行业占比均在81%-89%间。建筑业评价一般占比超二成（22.80%）。

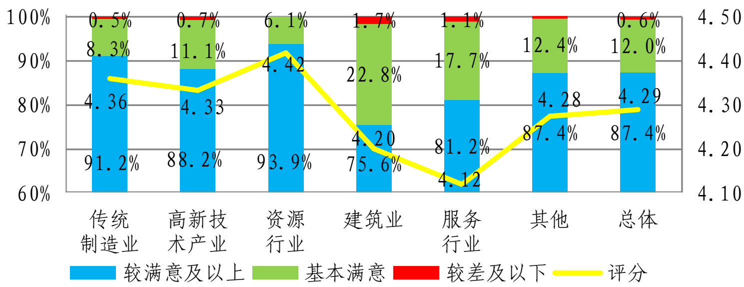

图2-36 不同行业对公平竞争环境的满意度占比图

从公平竞争环境细分指标看，大部分行业对市场监管评价较高，其中资源行业评价最高（4.51分），属于“非常满意”水平；大部分行业对行政垄断治理评价较低，其中，服务行业评价最低（4.05分），与最高值相差0.46分；大部分行业对各细分指标评价差异在0.05分-0.23分之间。

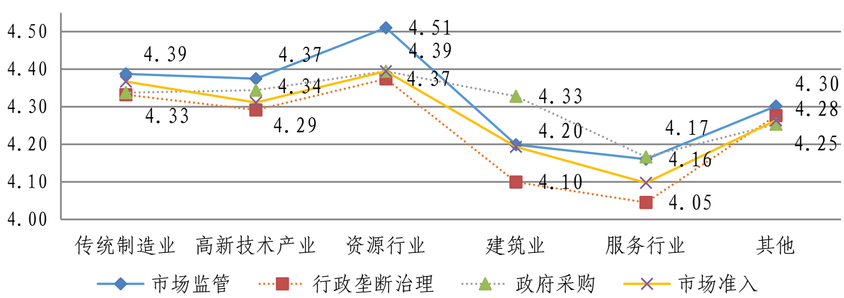

图2-37 不同行业对公平竞争环境细分指标的评价图

（四）公平竞争环境评价略有提升，外商独资企业提升最明显

动态看，2018年受访企业对公平竞争环境评价均值为4.22分；2019年上升为4.319分，提高0.099分。

(3) Industry evaluations are quite different, and the resource industry gives a relatively high evaluation.

From an industry perspective, the average value of evaluation in each industry is between 4.12 and 4.42. The resource industry gives the highest evaluation (4.42 points), which is close to “very satisfactory”, followed by traditional manufacturing industry and high-tech industry (4.36 points and 4.33 points respectively). The service industry gives a low evaluation (4.12 points), 0.30 points away from the highest value.

From the perspective of satisfaction rate, industries vary greatly. The resource industry has a satisfaction rate above 90% (93.90%), the highest rate, followed by the traditional manufacturing industry (91.20%). The building industry has a satisfaction rate under 80% (75.60%), 18.3 percentage points away from the highest value. The rest industries have a satisfaction rate between 81% and 89%. Over 20% (22.80%) of enterprises in the building industry consider fair competition environment fair.

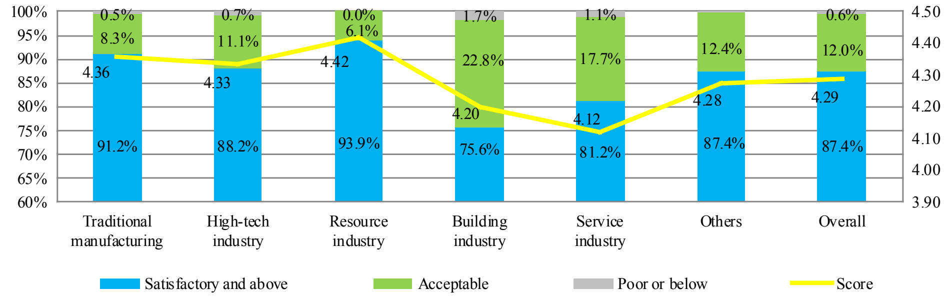

Chart 2-36 Proportion of satisfaction rate of fair competition environment in different industries

In the sub-indicators of fair competition environment, market regulation gets a high score from most industries, among which the resource industry gives the highest score (4.51 points), which means “very satisfactory”. Most industries give a low evaluation to administrative monopoly, among which the service industry gives the lowest (4.05 points), 0.46 points away from the highest value. The differences in the scores given by most industries to the sub-indicators are between 0.05 and 0.23 points.

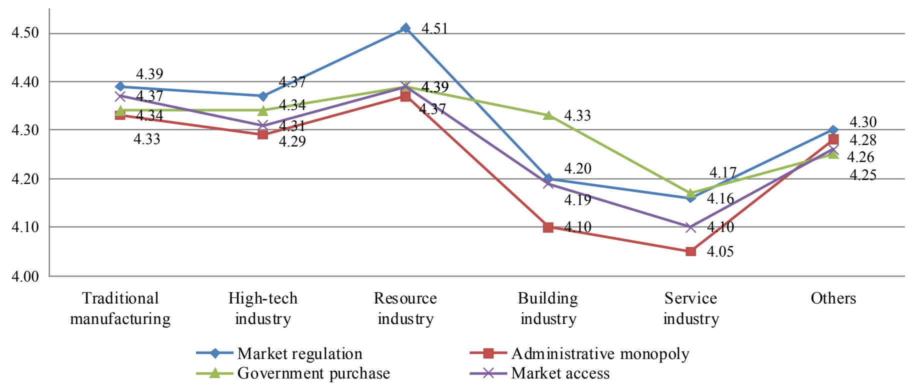

Chart2-37 Evaluation of fair competition environment sub-indicators in different industries

(4) The evaluation of fair competition environment has slightly improved, and wholly foreign-owned enterprises contribute the most obvious increase in the evaluation result.

Dynamically, the average score of fair competition environment in 2018 was 4.22 points; in 2019, it has increased to 4.319 points, up by 0.099 points.

1. 与 2018 年相比，2019 年各项指标略有提升。

2019 年各项指标虽均有提升，但提升幅度不明显。行政垄断治理和政府采购评价提升均为 0.09 分，市场监管次之（0.06 分），市场准入提升较少（提高 0.04 分）。

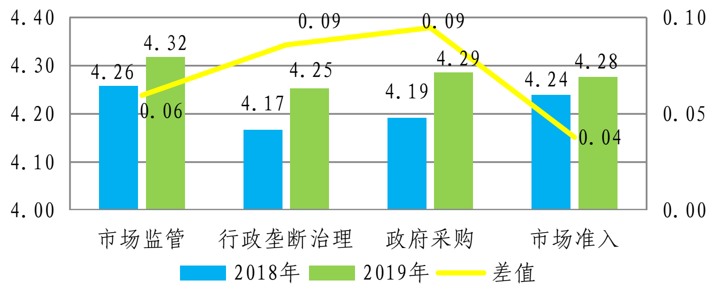

图2-38 公平竞争环境细分指标年度评价对比图

2. 与去年相比，2019 年东、西部企业评价提升，中部评价下降。

从地区角度看，与 2018 年相比，2019 年东、西部企业评价均略有提升，西部提升幅度较大，由 2018 年的 4.13 分提至 2019 年的 4.23 分；中部企业评价出现下降，由 2018 年的 4.41 分降至 2019 年的 4.37 分，下降 0.04 分。

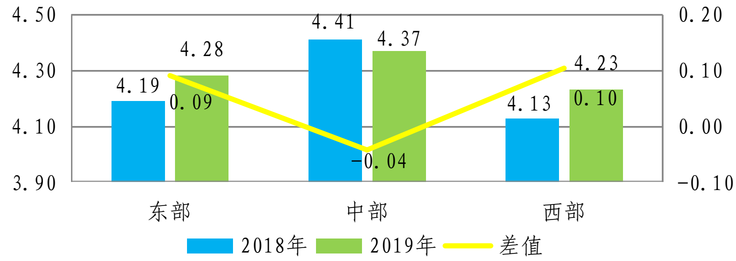

图2-39 公平竞争环境不同地区年度评价对比图

3. 各行业企业评价均有提升，但变动幅度差异较大。

从行业角度看，与 2018 年相比，2019 年各行业企业对公平竞争环境评价均有提升，但各行业评价差异较大。其中，资源行业评价提升幅度最大，由 2018 年的 4.16 分提至 2019 年的 4.46 分，接近“非常满意”水平；高新技术产业企业评价提升幅度较小，由 2018 年的 4.29 分提至 2019 年的 4.33 分，仅提高 0.05 分。

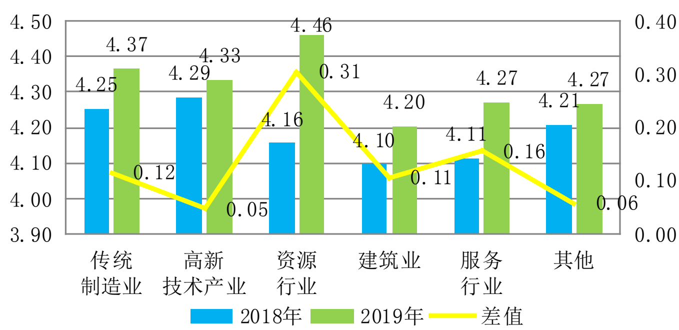

图2-40 公平竞争环境不同行业年度评价对比图

1. Compared with 2018, evaluations of the sub-indicators in 2019 have slightly increased.

Although the evaluations of the sub-indicators in 2019 have all improved, the increases are not obvious. Both administrative monopoly and government purchase see an increase by 0.09 points, followed by market regulation (by 0.06 points), and market access sees a small increase (by 0.04 points).

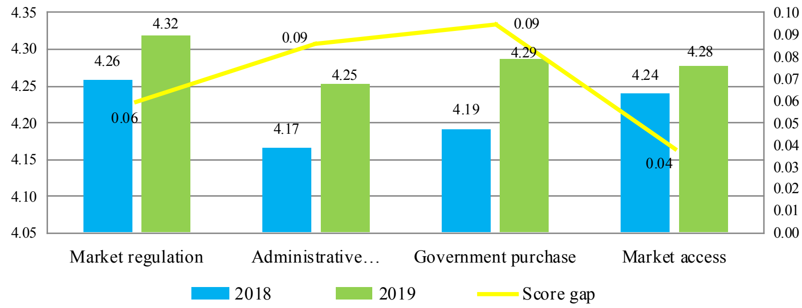

Chart 2-38 Comparison of annual evaluation of fair competition environment sub- indicators

2. Compared with 2018, evaluations in the eastern and western areas have increased in 2019, and the evaluation in the central area has declined.

From a regional perspective, compared with 2018, the evaluations by enterprises in the eastern and western areas have slightly increased in 2019, and the increase in the western area is relatively large, from 4.13 in 2018 to 4.23 in 2019. The evaluation by the central area has declined, from 4.41 in 2018 to 4.37 in 2019, down by 0.04 points.

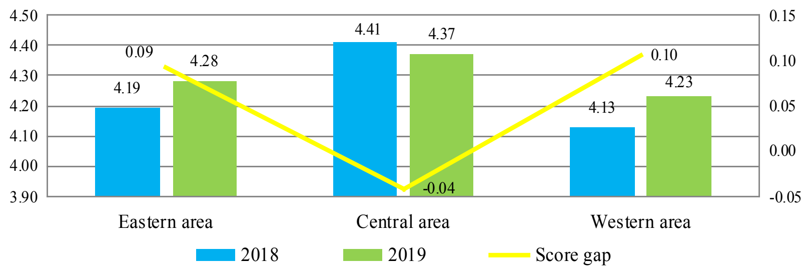

Chart 2-39 Comparison of annual evaluation of fair competition environment in different areas

3. Evaluations in all industries have improved, but the increases are quite different.

From an industry perspective, compared with 2018, enterprises in various industries have improved their evaluations of fair competition environment in 2019, but the evaluations by various industries are quite different. The resource industry contributes the largest increase in the evaluation result, from 4.16 points in 2018 to 4.46 points in 2019, close to "very satisfactory". The high-tech industry contributes a small increase in the evaluation result, from 4.29 in 2018 to 4.33 in 2019, only up by 0.05 points.

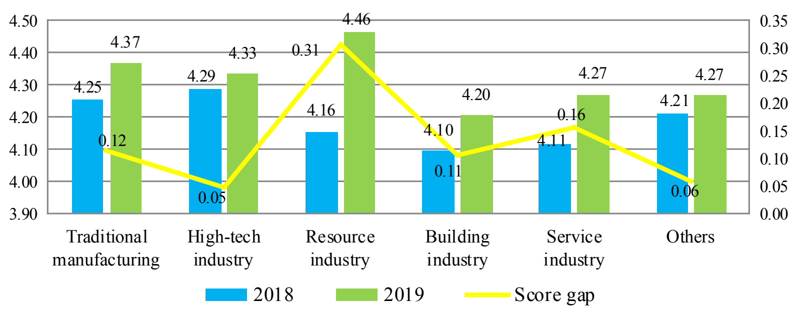

Chart 2-40 Comparison of annual evaluation of fair competition environment in different industries

4. 外商独资企业评价提升最明显

从不同所有制企业看，与 2018 年相比，2019 年各类型企业提升幅度在 0.06 分 -0.16 分之间。其中，外商独资企业评价提升幅度相对较大，由 2018 年的 4.21 分提至 2019 年的 4.37 分，提高 0.16 分。

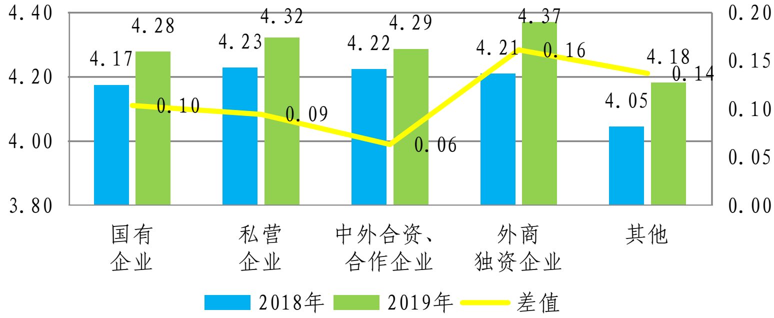

图2-41 公平竞争环境不同所有制企业年度评价对比图

六、知识产权保护环境评价良好

知识产权保护环境细分为知识产权维权成本、知识产权案件办结率、知识产权司法保护、知识产权行政执法及知识产权管理与公共服务五个二级指标。与 2018 年相比，2019 年受访企业对知识产权总体评价有所提升。

（一）总体评价良好，知识产权行政执法评价较高

知识产权保护环境评价良好（4.321 分），在 12 个一级指标中排第五，高于营商环境总体评价。在细分指标中，知识产权行政执法和知识产权管理与公共服务评价较高（分别为 4.302 分、4.298 分），知识产权司法保护居中（4.293 分），知识产权案件办结率和知识产权维权成本评价略低（分别为 4.242 分、4.241 分）。

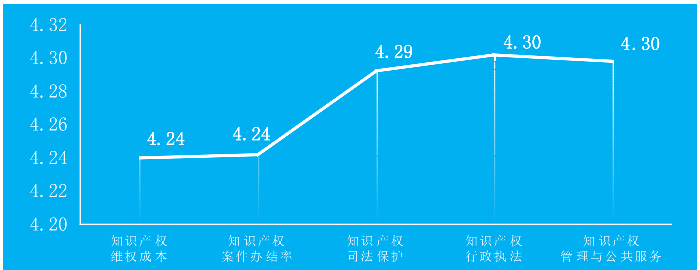

图2-42 知识产权保护环境细分指标评价图

4. Wholly foreign-owned enterprises see the most obvious increase in the evaluation result.

In different natures of enterprises, compared with 2018, all contribute an increase between 0.06 points and 0.16 points in 2019. Wholly foreign-owned enterprises see a relatively large increase, from 4.21 points in 2018 to 4.37 points in 2019, an increase of 0.16 points.

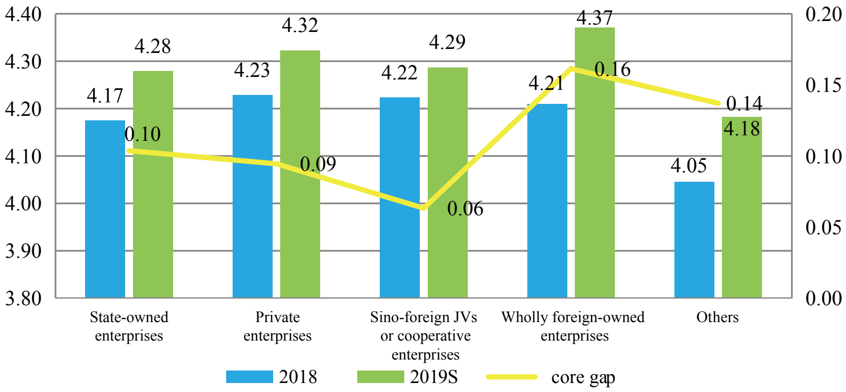

Chart 2-41 Comparison of annual evaluation of fair competition environment in enterprises of different natures

VI. IP protection environment receives favorable evaluation

IP protection environment sub-indicators include the five secondary indicators of IP protection cost, IP cases closure rate, IP judicial protection, IP administrative law enforcement, and IP management and public service. Compared with 2018, the overall evaluation of IP protection environment has improved in 2019.

(1) The overall evaluation is good, and IP administrative law enforcement gets a high score.

IP protection environmental is good (4.321 points), ranking fifth in the 12 first-level indicators, higher than the overall score of the business environment in China. Among the sub-indicators, IP administrative law enforcement and IP management and public service get high scores (4.302 and 4.298 respectively). IP judicial protection is in the middle (4.293 points), and IP cases closure rate and IP protection cost get slightly lower scores (4.242 and 4.241 respectively).

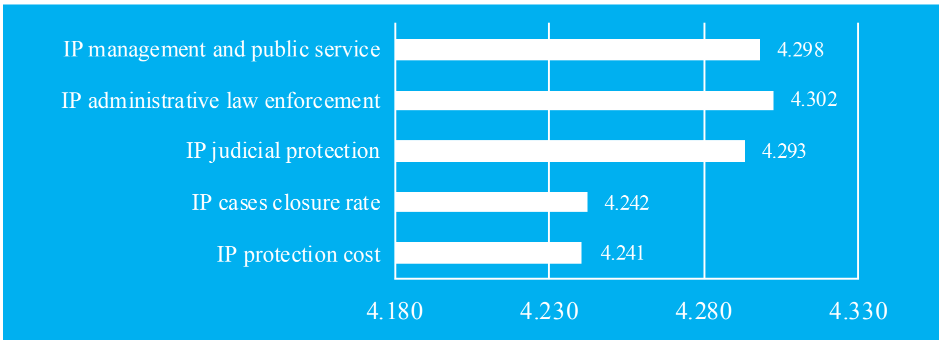

Chart 2-42 Evaluation of IP protection environment sub - indicators

从企业满意度看，知识产权保护环境较满意及以上企业占比为 83.90%，评价一般的企业占比为 15.20%。从细分指标看，各项指标满意度差异较小，较满意及以上占比均在 80%-85% 之间，其中，知识产权行政执法满意度最高（85%），知识产权维权成本满意度最低（80.90%）。

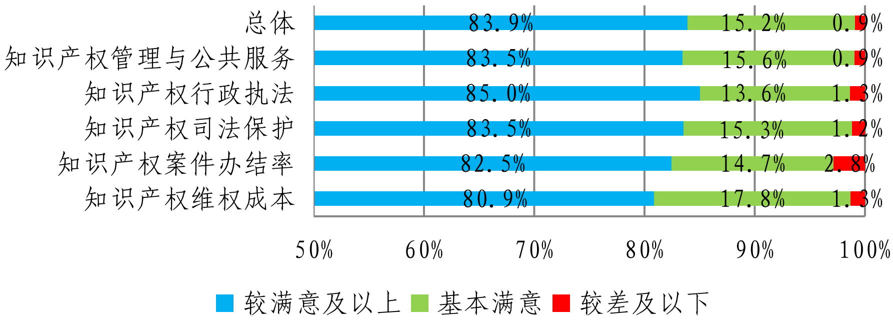

图2-43 知识产权保护环境细分指标满意度占比图

（二）各地区评价差异较大，中部企业评价最高

从地区角度看，各地区评价均较高。其中，中部评价最高（4.38 分），东、西部评价（分别为 4.26 分、4.24 分）均低于总体评价（4.28 分）。

从企业满意度看，各地区较满意及以上企业占比均超八成。其中，中部地区满意度最高，近九成为较满意及以上企业（88.60%）；东部次之（83.90%）；西部最低（80.50%）。同时，各地区反映一般的企业占比均超 10%，其中，西部占比近两成（18.50%）。

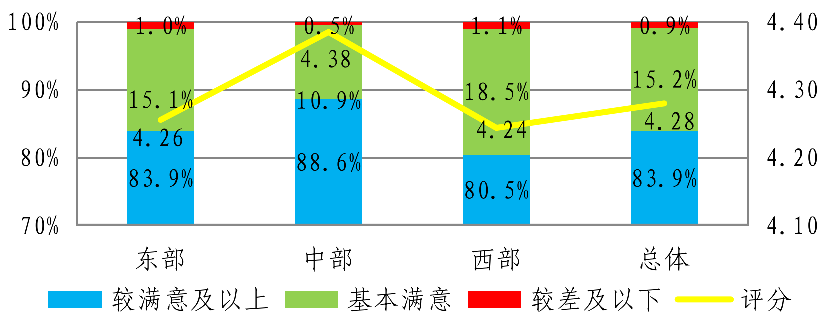

图2-44 各地区对知识产权环境综合评价图

从知识产权保护环境细分指标看，各地区间评价差异较大。其中，中部企业对五个细分指标评价均为最高；西部对知识产权维权成本、知识产权行政执法、知识产权管理与公共服务评价最低，东部对知识产权案件办结率和知识产权司法保护评价最低；各地区对知识产权维权成本评价差异最大（相差 0.21 分）。

In terms of satisfaction rate, 83.90% of the surveyed enterprises are satisfied and more than satisfied with IP protection environment, and 15.20% consider it fair. For the sub-indicators, the satisfaction rates are not that different, all between 80% and 85%. IP administrative law enforcement enjoys the highest satisfaction rate (85%), and IP protection cost the lowest (80.90%).

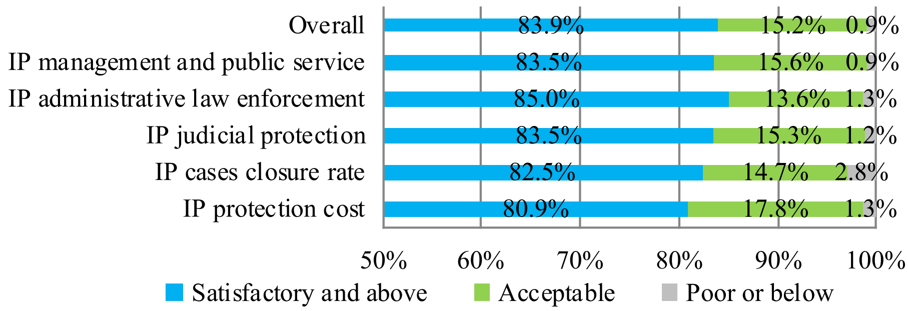

Chart 2-43 Proportion of satisfaction rate of IP protection environment sub-indicators

(2) Evaluations in different areas are quite varied, and the central area gives the highest evaluation.

From a regional perspective, the evaluations in all areas are high. The central area gives the highest (4.38 points), and the eastern and western areas give scores (4.26 and 4.24 respectively) that are lower than the overall score (4.28 points).

In terms of satisfaction rate, it is over 80% in all areas. The central area is the most satisfied, with a satisfaction rate of nearly 90% (88.60%), followed by the eastern area (83.90%), and the western area is the least satisfied (80.50%). At the same time, the proportions of enterprises considering IP protection environment fair are above 10% in all areas, and the western area has nearly 20% (18.50%) of enterprises rating as such.

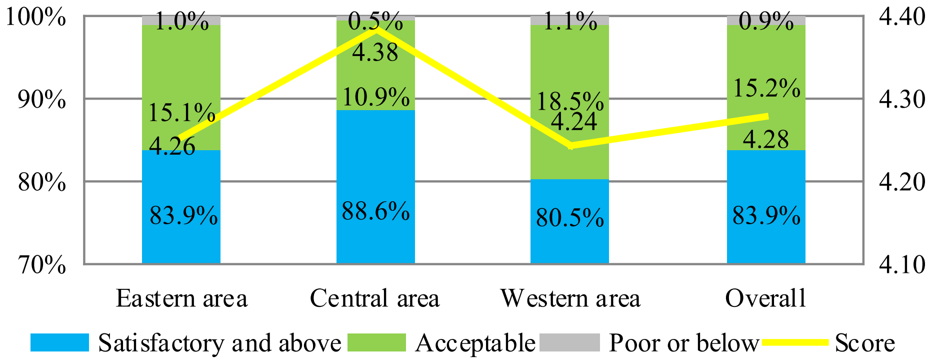

Chart 2-44 Comprehensive evaluation of IP protection environment in different areas

For the sub-indicators of IP protection environment, regional evaluations are quite different. The central area gives the highest evaluations to the five sub-indicators. The western area gives IP protection cost, IP administrative law enforcement, and IP management and public service the lowest scores. The eastern area gives IP cases closure rate and IP judicial protection the lowest scores. IP protection cost gets the most varied evaluations in all areas (the difference is 0.21 points).

表 2-6 各地区对知识产权保护环境细分指标的评价

排序	知识产权维权成本		知识产权案件办结率		知识产权司法保护		知识产权行政执法		知识产权管理与公共服务	
	地区	得分	地区	得分	地区	得分	地区	得分	地区	得分
1	中部	4.37	中部	4.37	中部	4.41	中部	4.38	中部	4.39
2	东部	4.23	西部	4.26	西部	4.26	东部	4.29	东部	4.29
3	西部	4.16	东部	4.18	东部	4.26	西部	4.25	西部	4.24

（三）资源行业、传统制造业评价较高，建筑业和服务行业评价较低

从行业角度看，各行业评价差异较大。其中，资源行业（4.40 分）、传统制造业（4.35 分）评价较高；高新技术产业（4.29 分）、其他行业（4.28 分）、建筑业（4.23 分）评价居中；服务行业评价明显偏低（4.12 分），与其他行业差距较大。

从企业满意度看，大部分行业较满意及以上企业占比均超八成，其中，资源行业超九成（91.10%）；传统制造业、高新技术产业和其他行业占比在 83%-89% 之间；服务行业（77.10%）和建筑业（75.60%）满意度较低，较满意及以上企业占比均低于八成。

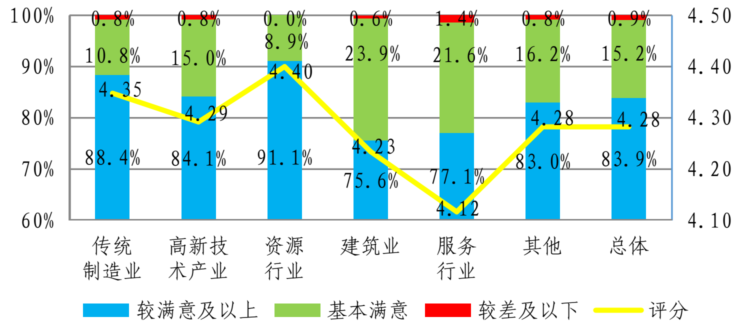

图2-45 不同行业对知识产权保护环境的满意度占比图

从知识产权保护环境细分指标看，各行业评价差异较大。资源行业对知识产权管理与公共服务评价最高（4.45 分），接近“非常满意”水平；建筑业对各细分指标评价差异最大，其中，对知识产权行政执法评价最高（4.35 分），对知识产权案件办结率评价

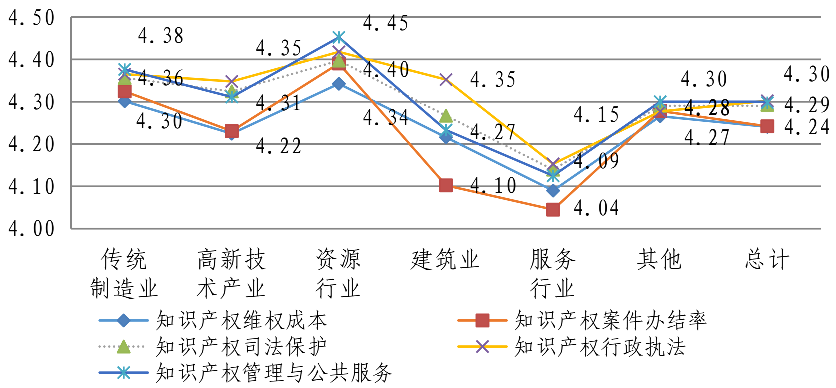

图2-46 不同行业对知识产权保护环境细分指标的评价图

Table 2-6 Evaluation of IP protection environment sub-indicators in different areas

Ranking	IP protection cost		IP cases closure rate		IP judicial protection		IP administrative law enforcement		IP management and public service	
	Area	Score	Area	Score	Area	Score	Area	Score	Area	Score
1	Central area	4.37	Central area	4.37	Central area	4.41	Central area	4.38	Central area	4.39
2	Eastern area	4.23	Western area	4.26	Western area	4.26	Eastern area	4.29	Eastern area	4.29
3	Western area	4.16	Eastern area	4.18	Eastern area	4.26	Western area	4.25	Western area	4.24

(3) The resource industry and traditional manufacturing industry give relatively high evaluations, and the building industry and service industry give relatively low ones.

From an industry perspective, industry evaluations are quite different. The resource industry gives 4.40 points and the traditional manufacturing industry gives 4.35 points, which are relatively high. The high-tech industry gives 4.29, other industries give 4.28, and building industry gives 4.23, which are in the middle. The service industry gives a significantly lower score of 4.12, a big gap with the score given by other industries.

In terms of satisfaction rate, it is over 80% in most industries. The resource industry has a satisfaction rate above 90% (91.10%). Traditional manufacturing, high-tech industry and other industries have a rate between 83% and 89%. The service industry (77.10%) and the building industry (75.60%) have low satisfaction rates, both below 80%.

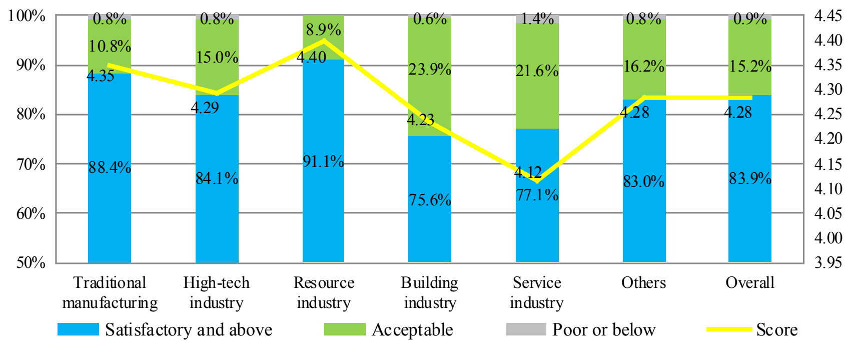

Chart 2-45 Proportion of satisfaction rate of IP protection environment in different industries

Seen from the sub-indicators of IP protection environment, industry evaluations are quite different. The resource industry gives the highest evaluation to IP management and public service (4.45 points), close to "very satisfactory". The building industry sees the largest difference in the evaluation of each sub-indicator, with the highest score given to IP administrative law enforcement (4.35 points) and the lowest to IP cases closure rate (4.10

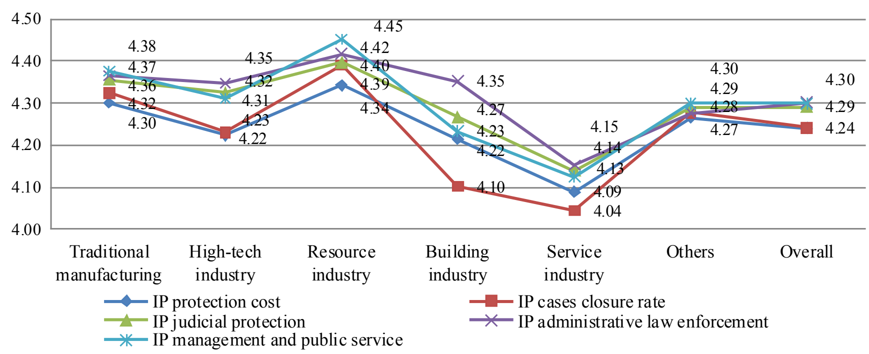

Chart2-46 Evaluation of IP protection environment sub-indicators in different industries

最低（4.10 分），最高与最低相差 0.25 分；服务行业对各细分指标评价均为最低，其中对知识产权案件办结率评分最低（4.04 分）。

（四）集体企业和中外合资、合作企业评价较高，外商独资企业满意度最高

从不同所有制角度看，各类型企业评价差异较小（在 4.20 分 -4.31 分之间）。其中，集体企业和中外合资、合作企业评价较高（均为 4.31 分），国有企业（4.29 分）、私营企业（4.28 分）和外商独资企业（4.28 分）评价居中；合伙企业（4.23 分）和其他类型企业较低（4.20 分）。

从企业满意度看，大部分企业满意度评价较均衡，较满意及以上企业占比在 84.00% 左右，其中，外商独资企业满意度最高（85.20%）；其他类型企业较满意及以上占比最低（72.80%），是唯一满意度低于八成的企业，一般企业占比也为最高（26.80%）。

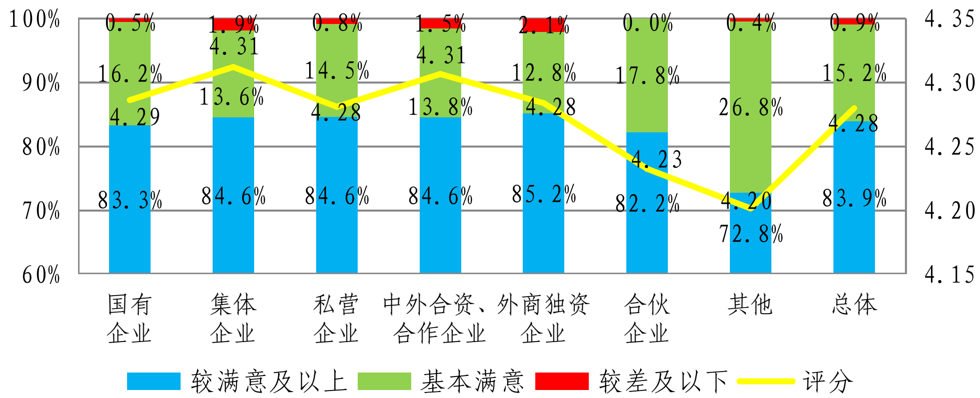

图2-47 不同所有制企业对知识产权保护环境的满意度占比图

从知识产权保护环境细分指标看，国有企业、集体企业和私营企业、中外合资、合作企业和外商独资企业对细分指标评价差异较小最高与最低差值均在 0.06 分 -0.10 分之间；合伙企业和其他类型企业差异略大，分差分别为 0.19 分、0.16 分。

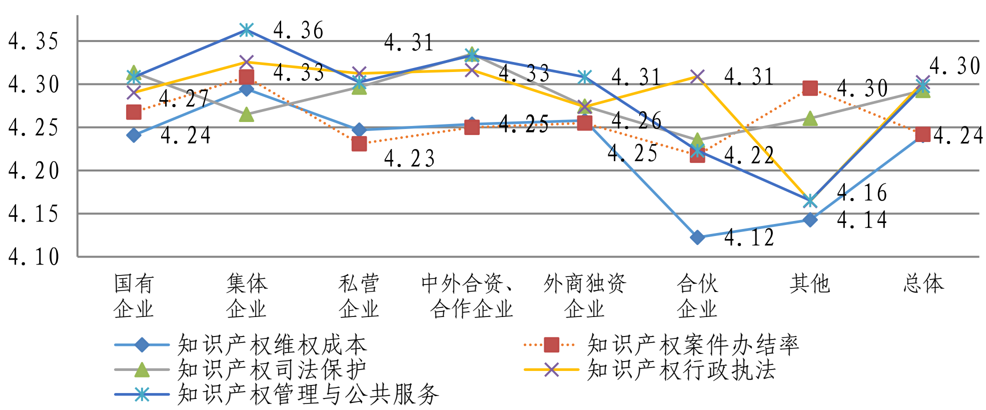

图2-48 不同所有制企业知识产权保护环境细分指标评价图

points), a difference of 0.25 points. The service industry gives the lowest evaluations to all the sub-indicators, with the lowest given to IP cases closure rate (4.04 points).

(4) Collectively-owned enterprises and Sino-foreign JVs and cooperative enterprises give relatively high evaluations, and wholly foreign-owned enterprises are the most satisfied.

In different natures of enterprises, evaluations are not that different (between 4.20 and 4.31). Collectively-owned enterprises and Sino-foreign JVs and cooperative enterprises give higher evaluations (both at 4.31 points), state-owned enterprises (4.29 points), private enterprises (4.28 points) and wholly foreign-owned enterprises (4.28 points) are in the middle, and partnership enterprises (4.23 points) and other types of businesses (4.20 points) give lower scores.

In terms of satisfaction rate, most types of enterprises are similar, with a satisfaction rate about 84.00%. Wholly foreign-owned ones have the highest satisfaction rate (85.20%), and other types of enterprises are the least satisfied (72.80%), the only ones with a satisfaction rate under 80%, and the proportion of enterprises giving a "fair" evaluation is also the highest under this category (26.80%).

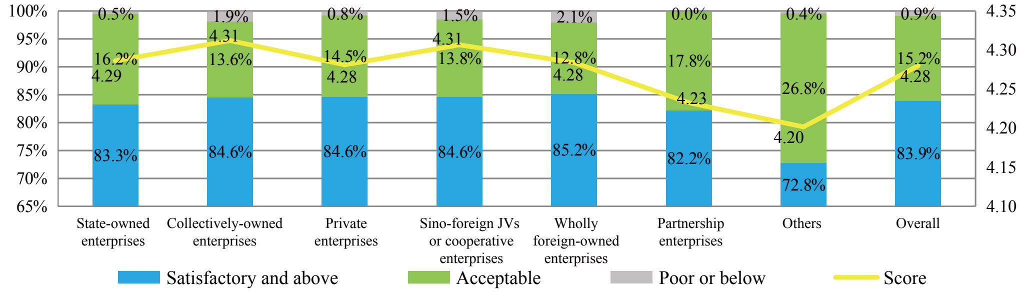

Chart 2-47 Proportion of satisfaction rate of IP protection environment in enterprises of different natures

Seen from the sub-indicators of IP protection environment, the evaluations given to them by state-owned enterprises, collectively-owned enterprises, private enterprises, Sino-foreign JVs and cooperative enterprises, and wholly foreign-owned enterprises are not that varied, with the difference between the highest and the lowest at 0.06-0.10. The difference in partnership enterprises and other types of enterprises is slightly larger, at 0.19 points and 0.16 points respectively.

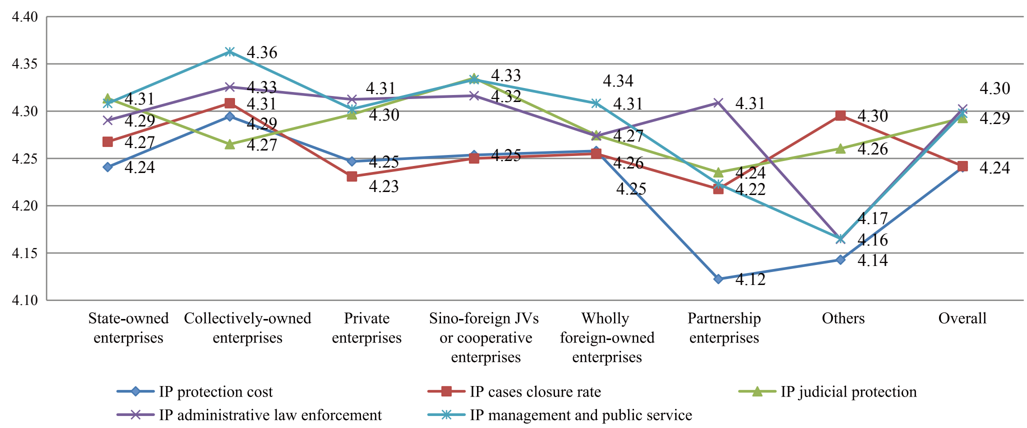

Chart2-48 Evaluation of IP protection environment sub-indicators in enterprises of different natures

（五）与2018年相比，2019年知识产权总体评价有所提升，西部企业提升较明显

与2018年相比，2019年受访企业对中国知识产权保护环境总体评价有所提升，提高0.07分。

1. 各细分指标评价均有提高，知识产权行政执法评价提升略高。

从知识产权保护环境细分指标看，与2018年相比，2019年各细分指标评价均有不同程度提升。其中，知识产权行政执法评价提升略大，提高0.05分；知识产权司法保护和知识产权管理与公共服务居中，均提高0.04分；知识产权维护成本和知识产权案件办结率较低，仅提高0.03分。

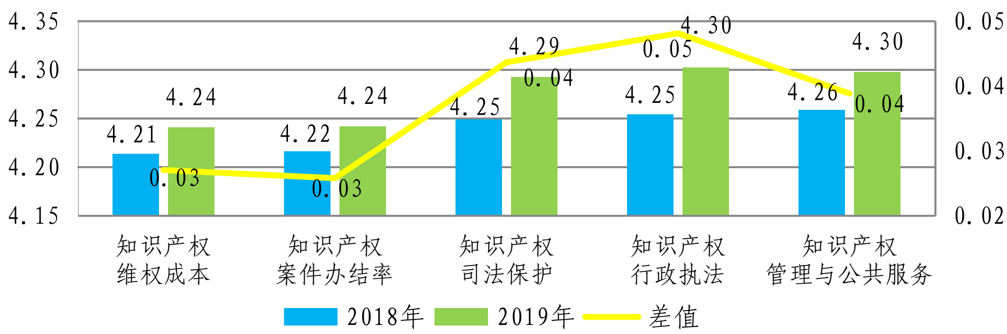

图2-49 知识产权保护环境细分指标年度评价对比图

2. 西部企业评价提升较大，中部企业评价有所下降。

从地区角度分析，与2018年相比，2019年西部评价提高幅度最大，提高0.10分；东部次之，提高0.03分；中部评价则出现下降，由2018年的4.44分降至2019年的4.38分，降低0.05分。

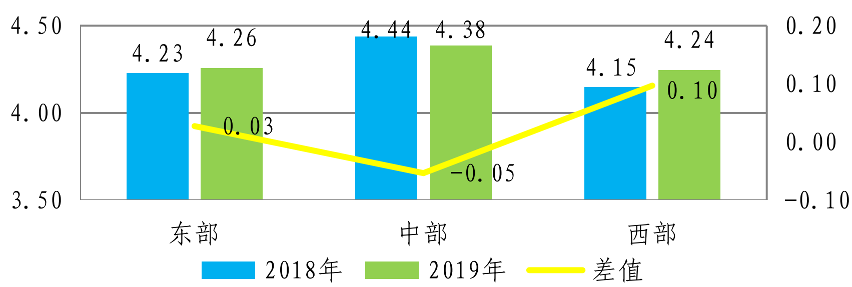

图2-50 知识产权保护环境不同地区年度评价对比图

3. 大部分行业评价有所提升，高新技术产业出现下降。

从行业角度看，与2018年比，2019年资源行业评价提升幅度最大，提高0.17分；

(5) Compared with 2018, the overall evaluation of IP protection environment has improved in 2019, and the increase is more obvious in the western area.

Compared with 2018, the overall evaluation of China's IP protection environment in 2019 has improved, up by 0.07 points.

1. Evaluations of all the sub-indicators have improved, and the increase in the evaluation of IP administrative law enforcement is slightly bigger.

In term of the sub-indicators of IP protection environment, compared with 2018, their evaluations have all increased in 2019 to different degrees. The evaluation of IP administrative law enforcement sees a slightly bigger increase, up by 0.05 points. IP judicial protection and IP management and public service are in-between, both up by 0.04 points. IP protection cost and IP cases closure rate see smaller increases, only up by 0.03.

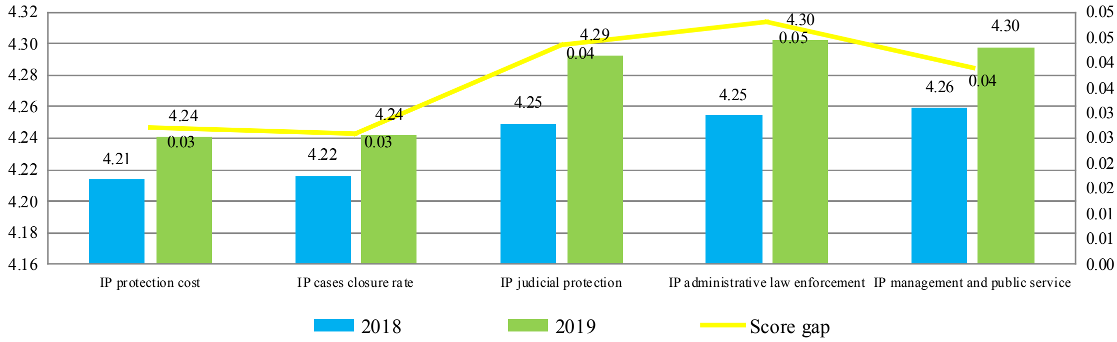

Chart 2-49 Comparison of annual evaluation of IP protection environment sub-indicators

2. The western area sees a bigger increase in the evaluation result, and the central area sees a decline.

From a regional perspective, compared with 2018, the western area contributes the biggest increase in the evaluation result in 2019, up by 0.10 points, followed by the eastern area, up by 0.03 points. The central area sees a decline, from 4.44 points in 2018 to 4.38 points in 2019, down by 0.05 points.

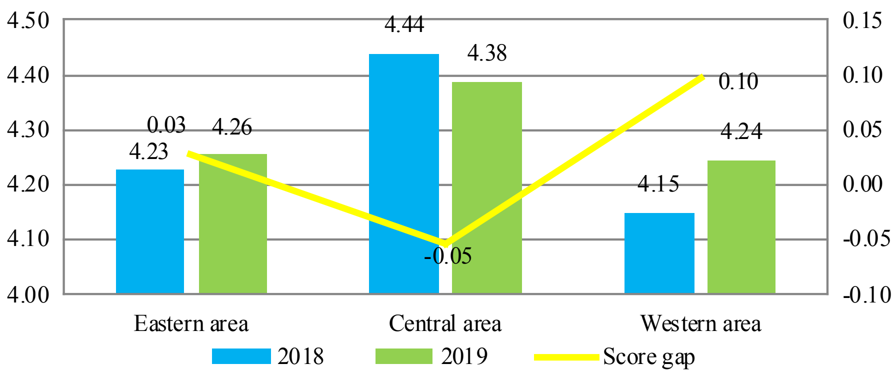

Chart 2-50 Comparison of annual evaluation of IP protection environment in different areas

3. Most industry evaluations have improved and high-tech industry sees a decline.

From an industry perspective, compared with 2018, the resource industry sees the biggest increase in the evaluation result in 2019, up by 0.17 points, followed by the service industry, up by 0.14 points. The increases

服务行业次之，提高0.14分；建筑业、传统制造业和其他行业评价提升幅度在0.04分-0.10分之间；唯有高新技术产业评价出现下降，由2018年的4.34分降至2019年的4.32分。

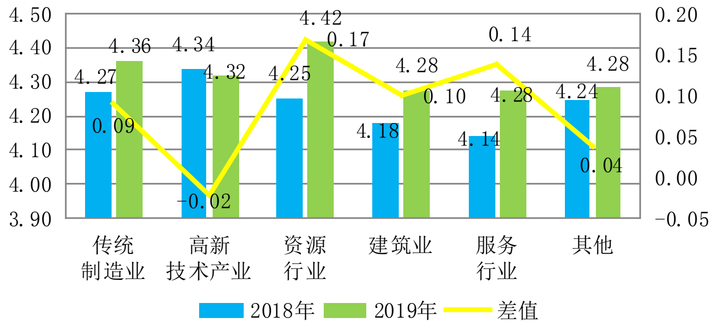

图2-51 知识产权保护环境不同行业年度评价对比图

4. 各类型企业评价均有不同程度提高，其他类企业提高明显。

从不同所有制角度看，与2018年比，2019年各类型企业对知识产权保护环境的评价均有提升。其中，除其他类型企业提升幅度较大外（提高0.17分），其余类型企业提升幅度均低于0.10分。

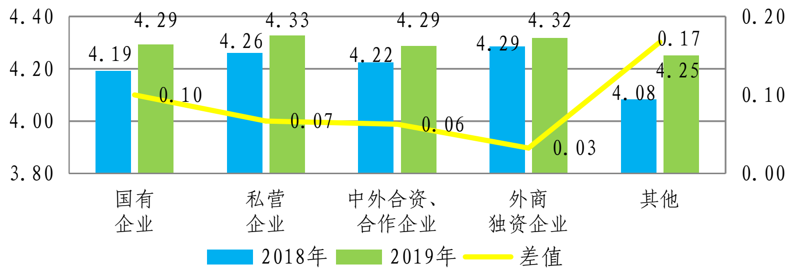

图2-52 知识产权保护环境不同所有制企业年度评价对比图

七、科技创新环境评价良好

科技创新环境细分为研发抵扣政策实施、知识产权抵押、产学研结合、创业孵化服务和公共服务平台建设五个二级指标。2019年受访企业对科技创新环境评价总体良好。

（一）知识产权抵押满意度较高，创业孵化服务评价最低

科技创新环境总体评价为4.309分，略高于营商环境总体评价。从细分指标看，各项指标评价较衡，在4.23分-4.30分之间，其中，研发抵扣政策实施评价较高，

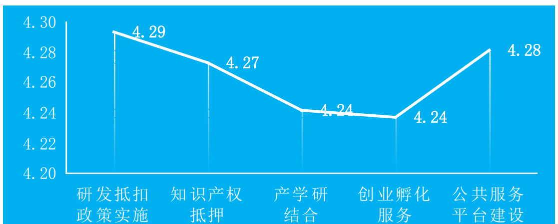

图2-53 科技创新环境细分指标评价图

are between 0.04 and 0.10 in the building industry, traditional manufacturing and other industries. Only the high-tech industry sees a decline, from 4.34 in 2018 to 4.32 in 2019.

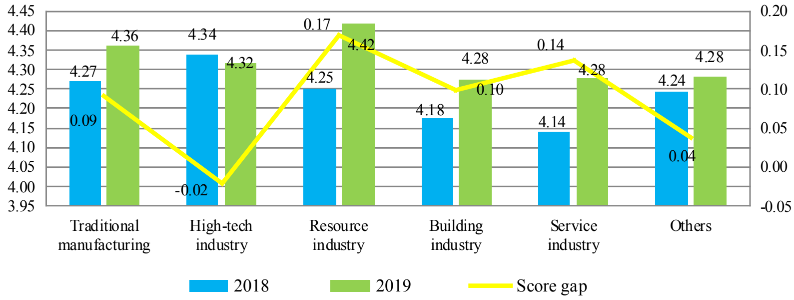

Chart 2-51 Comparison of annual evaluation of IP protection environment in different industries

4. All types of enterprises have given higher evaluations to different degrees, and the increase in other types of enterprises is significant.

In different natures of enterprises, compared with 2018, the evaluations of IP protection environment have all improved in 2019. Except a big increase in other types of enterprises (up by 0.17 points), the increases in the rest types of enterprises are under 0.10 points.

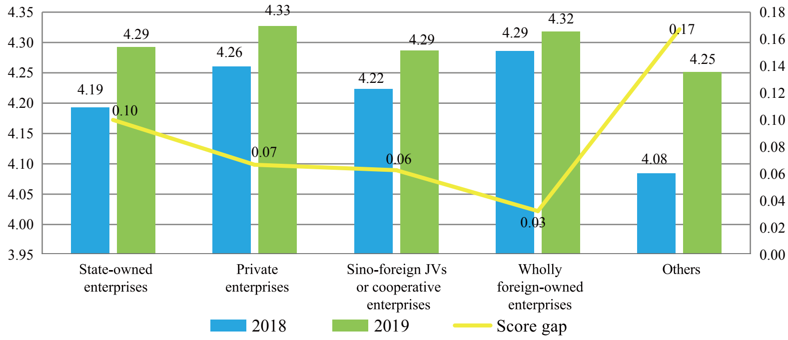

Chart 2-52 Comparison of annual evaluation of IP protection environment in enterprises of different natures

VII. Sci-tech innovation environment is well recognized

Sci-tech innovation environment sub-indicators include the five secondary indicators of R&D tax deduction policy implementation, IP collateralization, combination of industry, university and research, business incubation service and public service platform construction. In 2019, the overall evaluation of sci-tech innovation environment is good.

(1) IP collateralization enjoys a high satisfaction rate and business incubation service gets the lowest evaluation.

The overall score of sci-tech innovation environment is 4.309 points, slightly higher than the overall score of China's business environment. For the sub-indicators, evaluations are all balanced, ranging from 4.23 points to 4.30 points. Implementation of the R&D tax deduction policy is 4.294 points, and

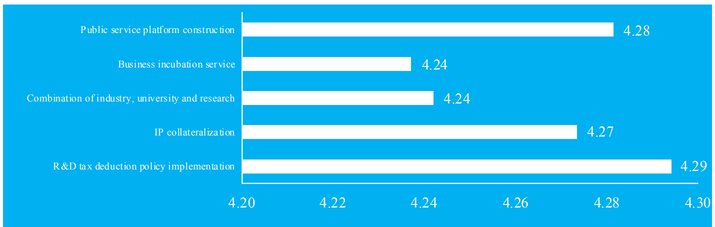

Chart 2-53 Evaluation of Sci-tech innovation environment sub-indicators

为 4.294 分，创业孵化服务评价最低，为 4.237 分。

从企业满意度评价看，科技创新环境较满意及以上企业占比超八成。从细分指标看，各项指标满意度相对均衡，较满意及以上企业占比在 81%-85%，其中，知识产权抵押满意度最高，较满意及以上企业占 84.20%；产学研结合最低，为 81.40%。

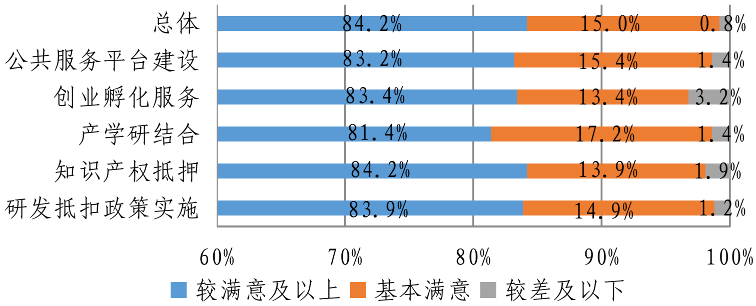

图2-54 科技创新环境细分指标满意占比图

（二）中部企业评价较高，东、西部评价较低

从地区角度看，东、中、西部企业评价呈现倒“V”型特征。其中，中部评价较高，为 4.39 分；东部和西部评价较低，分别为 4.24 分、4.23 分，且均低于总体评价（4.27 分）。

从企业满意度看，地区差异较大。其中，中部满意度最高，较满意及以上企业占比近九成（89.10%），东部居中（84.50%），西部最低（80%），与最高值相差近 10 个百分点。

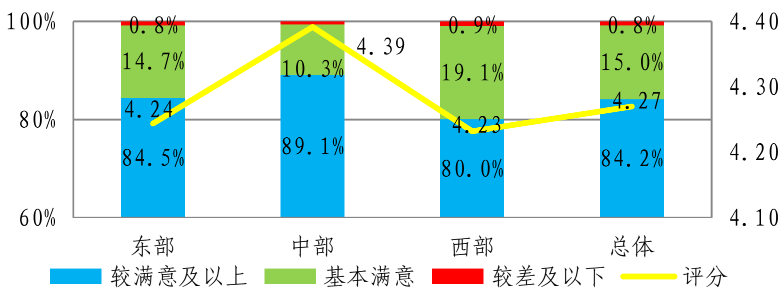

图2-55 各地区对科技创新环境综合评价图

从科技创新环境细分指标看，各地区评价不一。其中，中部企业对各项指标评价均居首位，对研发抵扣政策实施评价最高（4.44 分），接近“非常满意”水平；东部对创业孵化服务评价最低（4.20 分），西部对产学研结合评分最低（4.18 分）；各地区对产学研结合评价差异最大（0.23 分）。

business incubation service gets the lowest score, which is 4.237 points.

From the perspective of satisfaction rate, it is over 80%. For the sub-indicators, the satisfaction rates are relatively balanced, ranging from 81% to 85%. IP collateralization enjoys the highest satisfaction rate of 84.20%, and combination of industry, university and research has the lowest, at 81.40%.

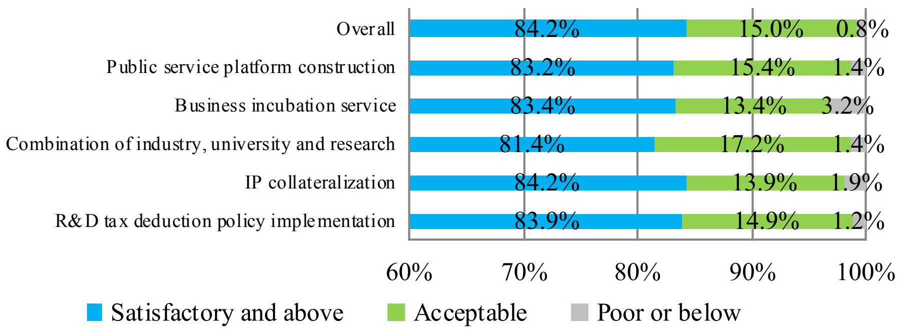

Chart 2-54 Proportion of satisfaction rate of Sci-tech innovation environment sub-indicators

(2) The central area gives a relatively high evaluation and the eastern and western areas give lower ones.

From a regional perspective, evaluations show an inverted V shape in the eastern, central and western areas. The central area gives a higher score, at 4.39 points, and the eastern and western areas give lower ones, at 4.24 points and 4.23 points respectively, and both are lower than the overall score (4.27 points).

In terms of satisfaction rate, regional differences are large. The satisfaction rate in the central area is the highest, reaching nearly 90% (89.10%), the eastern area is in the middle (84.50%), and the western area is the least satisfied (80%), which is nearly 10 percentage points lower than the highest value.

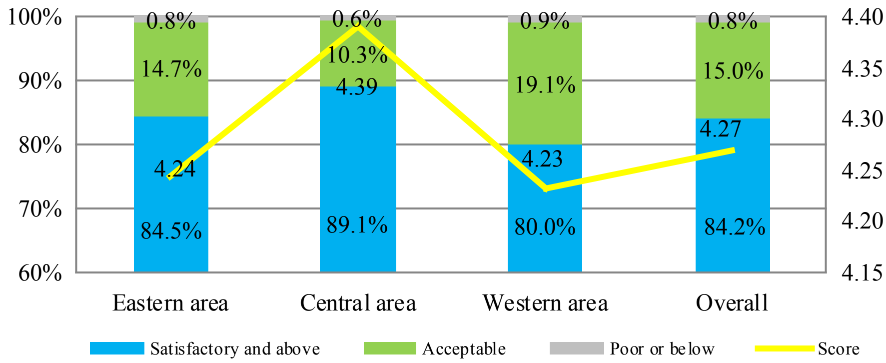

Chart 2-55 Comprehensive evaluation of Sci-tech innovation environment in different areas

For the sub-indicators of sci-tech innovation environment, regional evaluations are varied. The central area gives the highest scores to all the sub-indicators, with the highest given to the implementation of R&D tax deduction policy (4.44 points), close to "very satisfactory". The eastern area rates business incubation service as the lowest (4.20 points), and the western area gives the combination of industry, university and research the lowest score (4.18 points). The difference in the evaluation of the combination of industry, university and research in each area is the biggest (0.23 points).

表 2-7 各地区对科技创新环境细分指标的评价

排序	研发抵扣政策实施		知识产权抵押		产学研结合		创业孵化服务		公共服务平台建设		科技创新环境
	地区	得分	地区	得分	地区	得分	地区	得分	地区	得分	
1	中部	4.44	中部	4.33	中部	4.41	中部	4.35	中部	4.41	中部
2	东部	4.26	东部	4.27	东部	4.21	西部	4.22	东部	4.27	东部
3	西部	4.25	西部	4.23	西部	4.18	东部	4.20	西部	4.20	西部

（三）行业满意度差异较大，资源行业满意度最高

从行业角度看，各行业评价梯度明显。资源行业、高新技术产业和传统制造业处于第一梯队，评价均高于 4.30 分，其中，资源行业评价最高（4.38 分）；其他行业（4.27 分）、建筑业和服务行业评价居中，服务行业评价最低（4.12 分）。

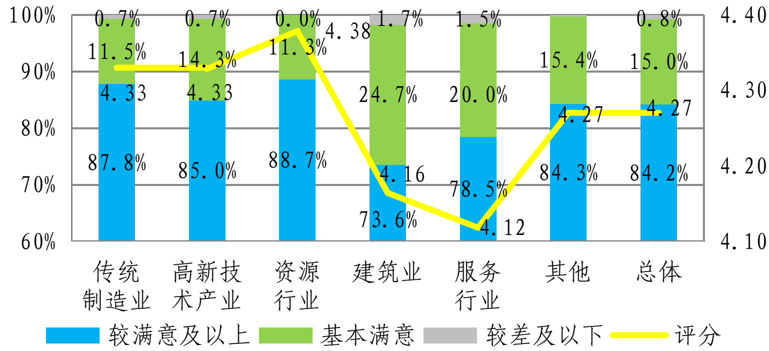

图2-56 不同行业对科技创新环境的满意度占比图

从企业满意度看，各行业满意度差异较大。其中，资源行业满意度最高，较满意及以上企业占比为 88.70%；建筑业占比最低，仅为 73.60%，两者相差 15.1 个百分点。

从科技创新环境细分指标看，大部分行业对各项指标评价差异不大，除建筑业（差值 0.22 分）和服务行业（差值 0.14 分）外，其余行业差值均小于 0.10 分，其中，传统制造业对各项指标评价差异最小（差值 0.06 分）。资源行业对公共服务平台建设评价最高（4.45 分），接近“非常满意”水平；建筑业对创业孵化服务评价最低（4.01 分），相差 0.44 分。

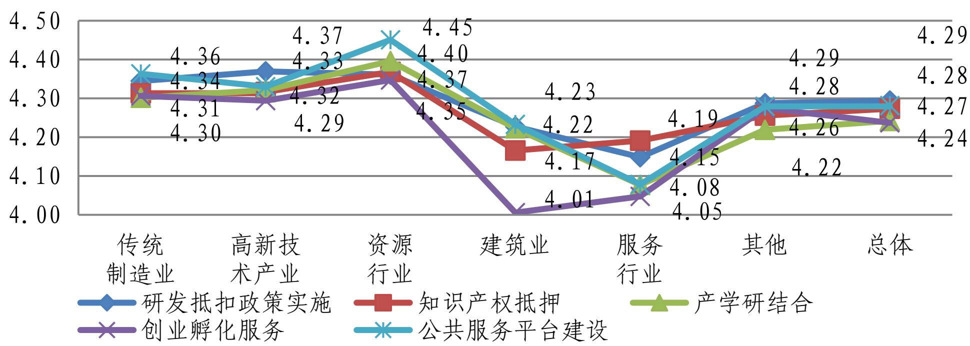

图2-57 不同行业对科技创新环境细分指标的评价图

Table 2-7 Evaluation of sci-tech innovation environment sub-indicators in different areas

Ranking	R&D tax deduction policy implementation		IP collateralization		Combination of industry, university and research		Business incubation service		Public service platform construction		Sci-tech innovation environment
	Area	Score	Area	Score	Area	Score	Area	Score	Area	Score	
1	Central area	4.44	Central area	4.33	Central area	4.41	Central area	4.35	Central area	4.41	Central area
2	Eastern area	4.26	Eastern area	4.27	Eastern area	4.21	Western area	4.22	Eastern area	4.27	Eastern area
3	Western area	4.25	Western area	4.23	Western area	4.18	Eastern area	4.20	Western area	4.20	Western area

(3) Industries have very different satisfaction rates and the resource industry is the most satisfied.

From an industry perspective, industry evaluations show a clear tiered distribution pattern. The resource industry, high-tech industry and traditional manufacturing industry are in the first tier, and their evaluations are all higher than 4.30 points, among which the resource industry gives the highest (4.38 points). Other industries (4.27 points), building industry and service industry are in the middle, and the service industry gives the lowest evaluation (4.12 points).

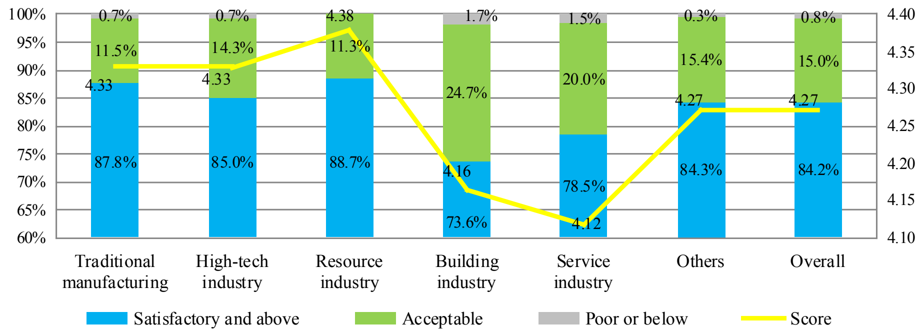

Chart 2-56 Proportion of satisfaction rate of Sci-tech innovation environment in different industrie

From the perspective of satisfaction rate, industries are quite different. The resource industry has the highest satisfaction rate of 88.70%, and the building industry has the lowest, at only 73.60%, a difference of 15.1%.

In terms of the sub-indicators of sci-tech innovation environment, evaluations are not that different in most industries. Except the building industry (the difference is 0.22 points) and the service industry (the difference is 0.14 points), the difference in the rest industries is less than 0.10 points. The traditional manufacturing industry sees the smallest difference in evaluations of various sub-indicators (the difference is 0.06 points). The resource industry gives the highest evaluation to public service platform construction (4.45 points), close to "very satisfactory". The building industry gives the lowest evaluation to business incubation service (4.01 points), a difference of 0.44 points from the highest value.

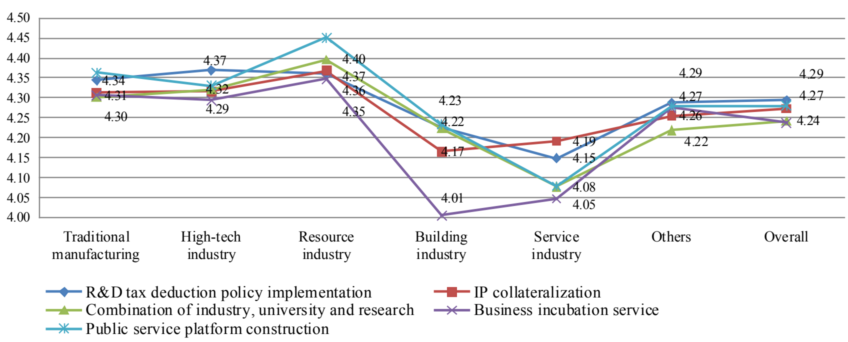

Chart2-57 Evaluation of Sci-tech innovation environment sub-indicators in different industries

（四）集体企业评价最高，中外合资、合作企业满意度最高

从不同所有制角度看，集体企业评价最高（4.34分），中外合资、合作企业（4.33分）和外商独资企业（4.32分），国有企业和私营企业评价居中（均为4.27分），合伙企业（4.22分）、其他类型企业评价较低（4.21分）。

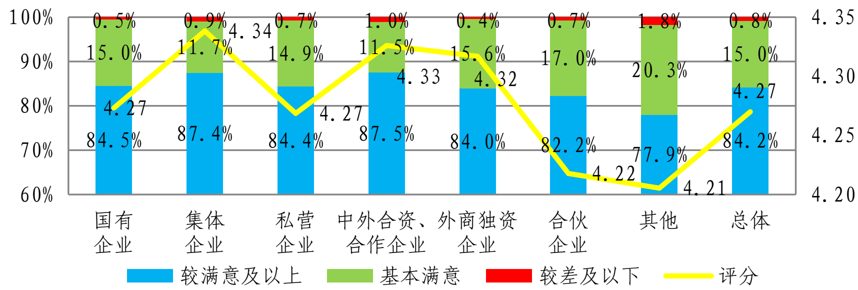

图2-58 不同所有制企业对科技创新环境的满意度占比图

从企业满意度看，大多数企业较满意及以上均高于80%。其中，中外合资、合作企业满意度最高，较满意及以上企业占比最高（87.50%）；集体企业次之（87.40%）；其他类型企业最低（77.90%），是唯一满意度低于八成的企业。

在科技创新环境细分指标中，不同所有制企业对各项细分指标评价差异较大（差值在0.04分-0.19分）。其中，国有企业和私营企业评价差异较小（分别为0.04分、0.05分），集体企业和中外合资、合作企业差异较大（分别为0.19分、0.17分）；对研发抵扣政策实施评价差异最大，其中，集体企业评价最高（4.43分），合伙企业最低（4.10分），相差0.33分。

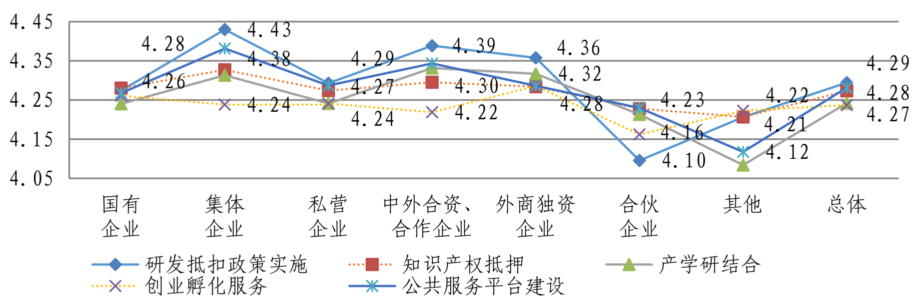

图2-59 不同所有制企业对科技创新环境细分指标评价图

（五）科技创新环境总体改善，创业孵化服务渐趋完善

从企业评价均值看，2018年受访企业对科技创新环境总体评价为4.22分，2019年为4.30分，提高0.08分。

(4) Collectively-owned enterprises give the highest satisfaction, and Sino-foreign JVs and cooperative enterprises are the most satisfied.

In different natures of enterprises, collectively-owned enterprises give the highest evaluation (4.34 points), Sino-foreign JVs and cooperative enterprises give 4.33 points and wholly foreign-owned ones give 4.32 points. State-owned and private enterprises are in the middle (both giving 4.27). Partnership enterprises (4.22) and other types of enterprises (4.21) give lower evaluations.

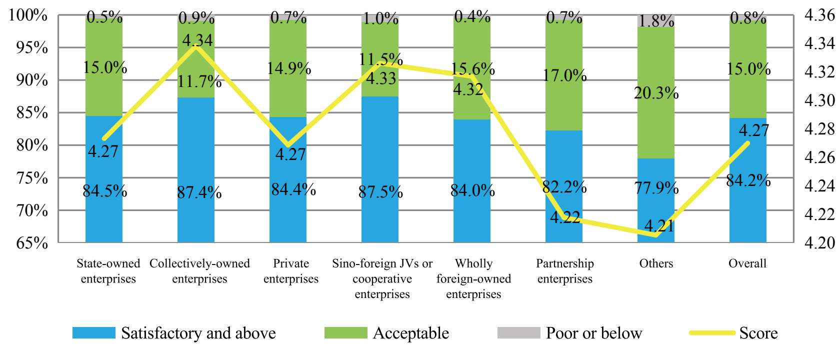

Chart 2-58 Proportion of satisfaction rate of Sci-tech innovation environment in enterprises of different natures

From the perspective of satisfaction rate, it is above 80% in most enterprises. Sino-foreign JVs and cooperative enterprises have the highest satisfaction rate of 87.50%, followed by collectively-owned enterprises (87.40%). The lowest is in other types of businesses (77.90%), the only group with a satisfaction rate under 80%.

For the sub-indicators of sci-tech innovation environment, evaluations are quite different in various natures of enterprises (the differences are between 0.04 points and 0.19 points). The differences in the evaluations by state-owned and private enterprises are small (0.04 and 0.05 respectively), and the differences in the evaluations by collectively-owned enterprises and Sino-foreign JVs and cooperative enterprises are large (0.19 and 0.17 respectively). R&D tax deduction policy implementation gets the most varied evaluations, in which the highest is from collectively-owned enterprises (4.43 points) and the lowest is from partnership enterprises (4.10 points), a difference of 0.33 points.

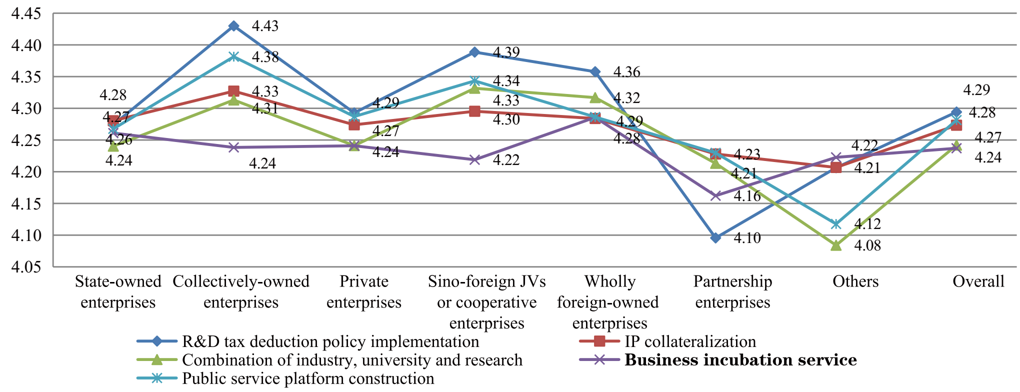

Chart2-59 Evaluation of Sci-tech innovation environment sub-indicators in enterprises of different natures

(5) The overall sci-tech innovation environment has become better, and business incubation service is gradually improving.

Based on the average value of evaluations, the overall score of sci-tech innovation environment in 2018 was 4.22 points, and has increased to 4.30 in 2019, up by 0.08 points.

1. 知识产权抵押评价提升较大，公共服务平台建设较小。

从科技创新环境细分指标看，与 2018 年相比，2019 年各项指标均有提升，但提升幅度有限，提高分值均小于 0.10 分。其中，知识产权抵押相对较大，提高 0.09 分；公共服务平台建设较小（0.03 分）。

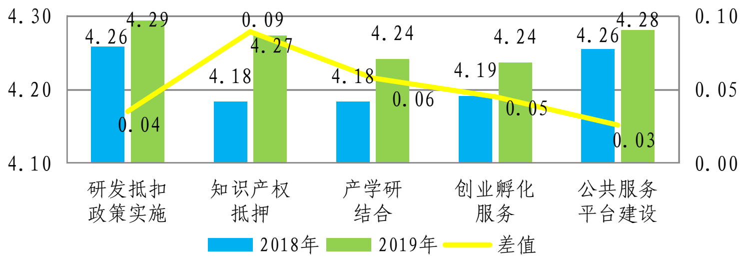

图2-60 科技创新环境细分指标年度评价对比图

2. 各个地区提升幅度大小不一，西部提升明显。

从地区角度看，与 2018 年相比，2019 年各地区评价提升幅度大小不一。其中，西部提升幅度较大，由 2018 年的 4.11 分提至 2019 年的 4.23 分，提高了 0.12 分；东部和中部提升幅度较小，仅分别提高 0.03 分和 0.01 分。

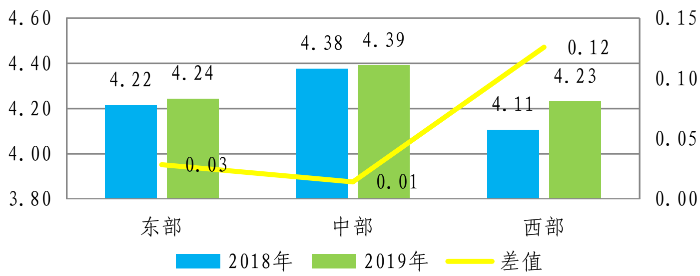

图2-61 科技创新环境不同地区年度评价对比图

3. 各行业评价均有提升，资源行业最明显。

从行业角度分析，与2018年相比，2019年各行业对科技创新环境的评价均有提升。其中，资源行业提升最明显，由 2018 年的 4.18 分提至 2019 年的 4.39 分，提高 0.21 分；服务行业次之，提高 0.18 分；其余行业提高均低于 0.10 分，高新技术产业提升小（0.05 分）。

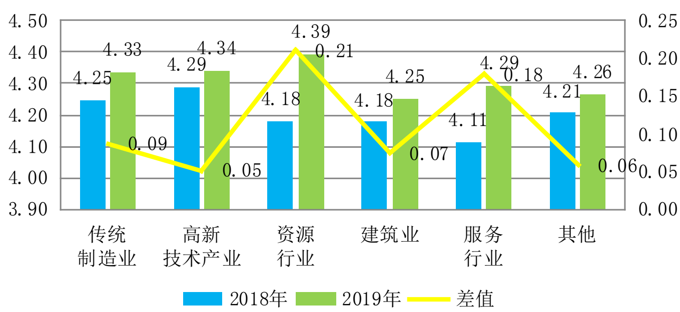

图2-62 科技创新环境不同行业年度评价对比图

1. The evaluation of IP collateralization has greatly increased, and that of public service platform construction has improved in a small range.

In terms of the sub-indicators of sic-tech innovation environment, compared with 2018, evaluations of all the sub-indicators have improved in 2019, but in a limited range under 0.10 points. IP collateralization sees a relatively big increase by 0.09 points, and public service platform construction sees a small one (by 0.03 points).

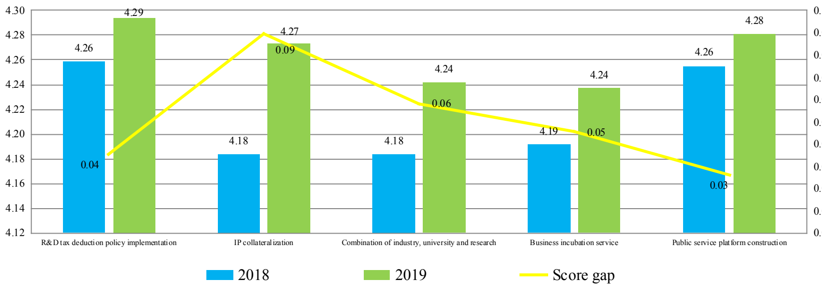

Chart 2-60 Comparison of annual evaluation of Sci-tech innovation environment sub-ndicators

2. Evaluations in different areas have improved to different degrees, and the increase in the western area is the most obvious.

From a regional perspective, compared with 2018, evaluations in different areas in 2019 have improved to different degrees. The increase in the western area is relatively large, from 4.11 points in 2018 to 4.23 points in 2019, up by 0.12 points, and that in the eastern and central areas is small, only by 0.03 points and 0.01 points respectively.

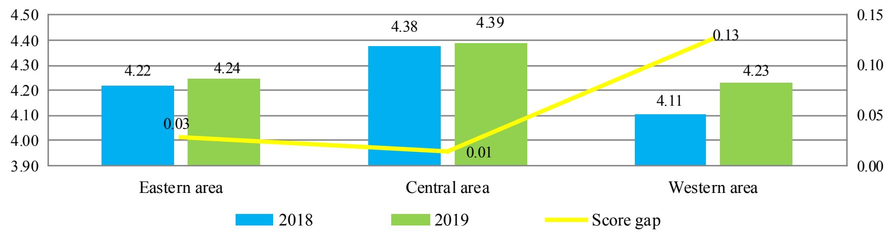

Chart 2-61 Comparison of annual evaluation of Sci-tech innovation environment in different areas

3. Evaluations in various industries have all improved, and the resource industry sees the most obvious increase.

From an industry perspective, compared with 2018, the evaluations of sci-tech innovation environment in various industries have all improved in 2019. The resource industry sees the most obvious improvement, from 4.18 points in 2018 to 4.39 points in 2019, up by 0.21 points, followed by the service industry, up by 0.18 points. The increases in the rest industries are all lower than 0.10 points, and the high-tech industry sees a small increase of 0.05 points.

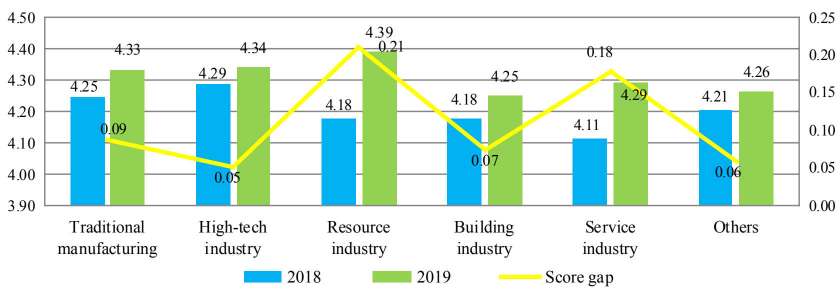

Chart 2-62 Comparison of annual evaluation of Sci-tech innovation environment in different industries

八、人力资源环境不容乐观

人力资源环境细分为熟练劳动力的可获得性、中高层管理人员的可获得性、外向型人才的可获得性及创新创业人才资源可得性四个二级指标。2019 年受访企业对人力资源环境总体评价不高。

（一）人力资源环境总体评价较低，人才可获得性满意度不高，人工成本占总成本超二成

人力资源环境评价为 4.018 分，在 12 个一级指标中排名最后，远低于营商环境总体评价平均水平。从细分指标看，各项指标评价普遍较低，其中，熟练劳动力的可获得性评价最高（4.02 分），创新创业人才资源可获得性最低（3.88 分）。

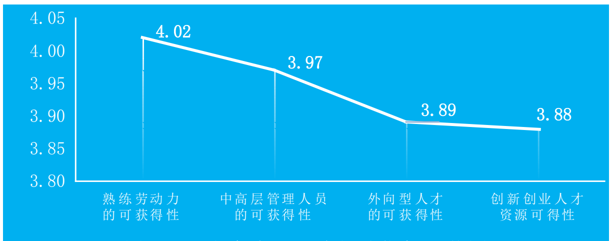

图2-63 人力资源环境细分指标评价图

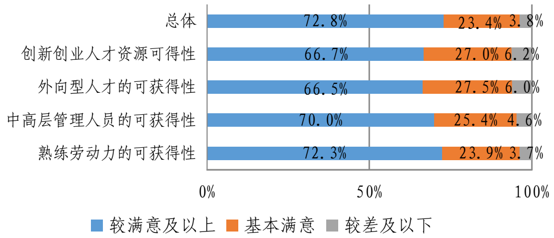

图2-64 人力资源环境细分指标满意度占比图

从企业满意度看，人力资源环境较满意及以上企业占比约为 3/4，评价一般占比约为 1/4。从细分指标看，各类人才的可获得性满意度均低于 75%，其中，外向型人才的可获得性满意度最低，较满意及以上占比仅为 66.50%。

企业问卷调查显示，2019 年人工成本占总成本高达 27.64%，人工成本年均上涨幅度达 9.50%。

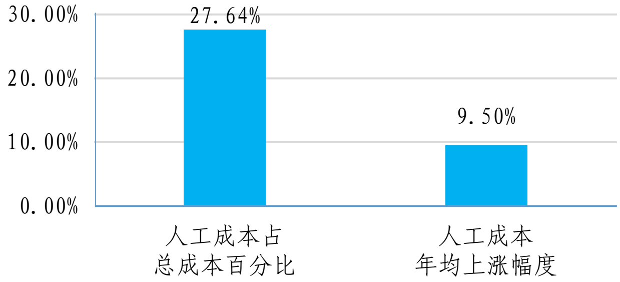

图2-65 人工成本占总成本百分比与年均上涨幅度

VIII. Evaluation result of human resources environment is not good

Human resources environment sub-indicators include the four secondary indicators of availability of experienced manpower, availability of middle and high level management staff, availability of export-oriented talents, and availability of innovative and entrepreneurial talents. In 2019, the overall score of human resources environment is not high.

(1) The overall score of human resources environment is low, the satisfaction rate of talent availability is not high, and labor cost accounts for more than 20% of the total cost.

The human resources environment has an overall score of 4.018 points, ranking last in the 12 first-level indicators, far below the overall score of China's business environment. For the sub-indicators, evaluations are generally low. Availability of experienced manpower gets the highest evaluation (4.02 points), and availability of innovative and entrepreneurial talents gets the lowest (3.88 points).

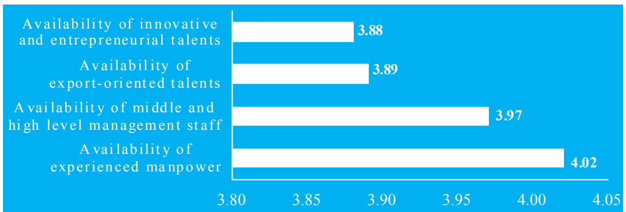

Chart 2-63 Evaluation of human resources environment sub-indicators

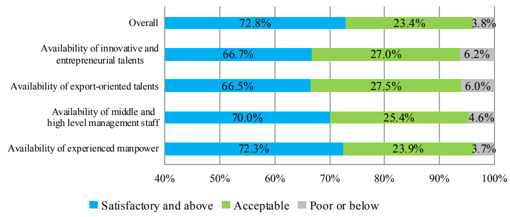

Chart 2-64 Proportion of satisfaction rate of human resources environment sub-indicators

In terms of satisfaction rate, enterprises considering human resources environment satisfactory and above account for about 3/4, and those considering it fair account for about 1/4. For the sub-indicators, the satisfaction rates are all under 75%. Availability of export-oriented talents has the lowest satisfaction rate of 66.50%.

According to questionnaire surveys among enterprises, the labor cost in 2019 takes up as high as 27.64% of the total cost, and the annual average rise in labor cost is 9.50%.

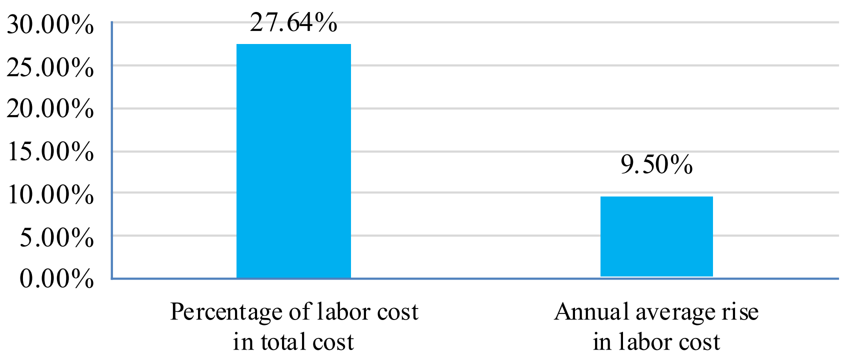

Chart 2-65 Percentage of labor cost in total cost and annualaverage rise in labor cost

（二）东、中、西部评价依次递减，东部人工成本上涨近 10%

从不同地区角度看，各地区评价均小于 4.00 分，且呈现东、中、西部依次递减的特点。其中，东部评价最高（3.96 分），中部居中（3.95 分），西部最低（3.89 分）。

从企业满意度看，各地区较满意及以上企业占比均低于 75%，并呈现出东、中、西部依次递减的特点。其中，东部较满意及以上企业占比为 74.70%，中部占 73.50%，西部最低且低于七成（69.20%）。

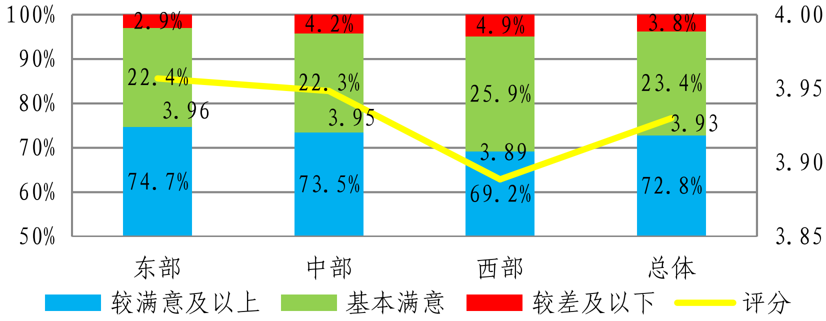

图2-66 各地区对人力资源环境综合评价图

从人力资源环境细分指标看，地区评价差异较小（差值 0.04 分 -0.11 分），其中，各地区对中高层管理人员的可获得性评价差异最小（0.04 分），对创新创业人才可获得性评价差异最大（0.11 分）。在各项指标中，中部企业对外向型人才的可获得性评价最高（3.94 分）；东部企业对各项指标评价均较高，其中，对熟练劳动力的可获得性评分最高（4.04 分）；西部对各项指标评价均为最低，其中，对创新创业人才可获得性评价为 3.81 分。

表 2-8 各地区对人力资源环境细分指标的评价

排序	熟练劳动力的可获得性		中高层管理人员的可获得性		外向型人才的可获得性		创新创业人才资源可获得性		人力资源环境
	地区	得分	地区	得分	地区	得分	地区	得分	
1	东部	4.04	东部	3.99	中部	3.94	东部	3.92	东部
2	中部	4.00	中部	3.98	东部	3.89	中部	3.89	中部
3	西部	3.99	西部	3.95	西部	3.86	西部	3.81	西部

企业问卷调查显示，各地区人工成本年均上涨幅度差异不大，且呈现东、中、西部依次递减的特点。其中，东部年均上涨幅度最高（9.82%），中部次之（9.65%），西部最低（8.30%）。极大值方面，西部最高（510%），中部最低（80%）。

(2) Evaluations show a declining trend from eastern, central to western areas, and the labor cost in the east is up by nearly 10%.

From a regional perspective, the evaluation in each area is less than 4.00 points, and shows a declining trend from eastern, central to western areas. The eastern area gives the highest score (3.96 points), followed by the central area (3.95 points), and the western area gives the lowest (3.89 points).

In terms of satisfaction rate, it is below 75% in all areas, and declines from eastern, central to western areas. The satisfaction rate in the eastern area is 74.70%, that in the central area is 73.50%, and that in the western area is the lowest, below 70% (69.20%).

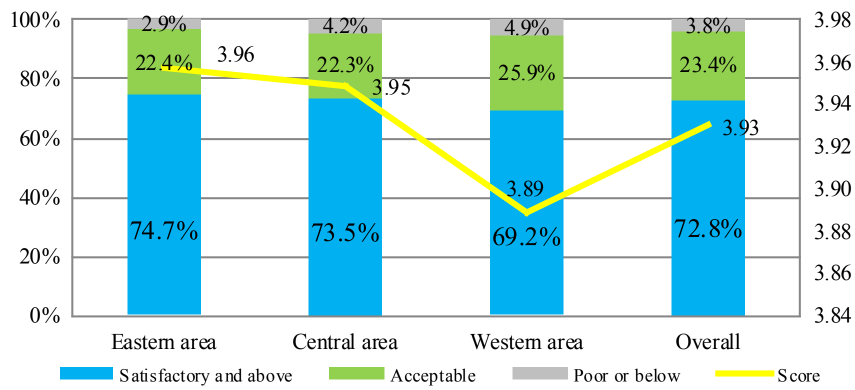

Chart 2-66 Comprehensive evaluation of human resources environment in different areas

For the sub-indicators of human resources environment, regional evaluations are not that different (the differences are between 0.04 and 0.11 points). The difference in the evaluations of availability of middle and high level management staff is the smallest (0.04 points) in different areas, and that of availability of innovative and entrepreneurial talents is the largest (0.11 points) in different areas. Among the sub-indicators, the central area gives the highest evaluation to availability of export-oriented talents (3.94 points). The eastern area gives high evaluations to all the sub-indicators, with the highest score given to availability of experienced manpower (4.04 points). The western area gives all the sub-indicators the lowest scores, and availability of innovative and entrepreneurial talents gets 3.81 points.

Table 2-8 Evaluation of human resources environment sub-indicators in different areas

Ranking	Availability of experienced manpower		Availability of middle and high level management staff		Availability of export-oriented talents		Availability of innovative and entrepreneurial talents		Human resources environment
	Area	Score	Area	Score	Area	Score	Area	Score	
1	Eastern area	4.04	Eastern area	3.99	Central area	3.94	Eastern area	3.92	Eastern area
2	Central area	4.00	Central area	3.98	Eastern area	3.89	Central area	3.89	Central area
3	Western area	3.99	Western area	3.95	Western area	3.86	Western area	3.81	Western area

According to questionnaire surveys among enterprises, the annual average increases of labor cost in different areas are not that different, and decline from eastern, central to western areas. The annual average increase in the eastern area is the biggest (9.82%), followed by the central area (9.65%), and the smallest increase is in the western area (8.30%). In terms of the maximum value, the highest is in the west (510%) and the lowest is in the central area (80%).

表 2-9 各地区人工成本年均涨幅（单位：%）

排序	均值		极大值		极小值	
	地区	上涨幅度	地区	上涨幅度	地区	上涨幅度
1	东部	9.82	西部	510	中部	-10.6
2	中部	9.65	东部	200	西部	-11.0
3	西部	8.30	中部	80	东部	-24.0
总体	9.50		510		-24	

（三）行业评价普遍较低且差距较大，服务行业人工成本上涨快、占比高

从行业角度看，行业间评价差距较大。大部分行业评价均低于 4.00 分，其中，资源行业评价最高（4.11 分），建筑业、服务行业及高新技术产业评价介于 3.90 分到 3.96 分之间，传统制造业评价最低（3.88 分），是唯一低于 3.90 分的行业。

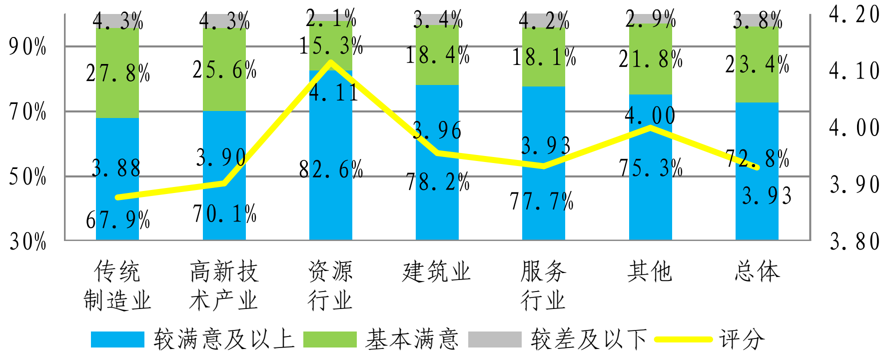

图2-67 不同行业对人力资源环境的满意度占比图

从企业满意度看，各行业满意度评价均较低。其中，仅资源行业较满意及以上企业占比超八成（82.60%），其余均低于八成，传统制造业低于七成（仅为 67.90%），建筑业、服务行业、其他行业及高新技术产业介于 70% 至 80% 之间。

从人力资源环境细分指标看，资源行业对各项指标评价均为最高，其中，对熟练劳动力可获得性评价最高（4.21 分）；传统制造业对各项指标评价较低，其中，对创新创

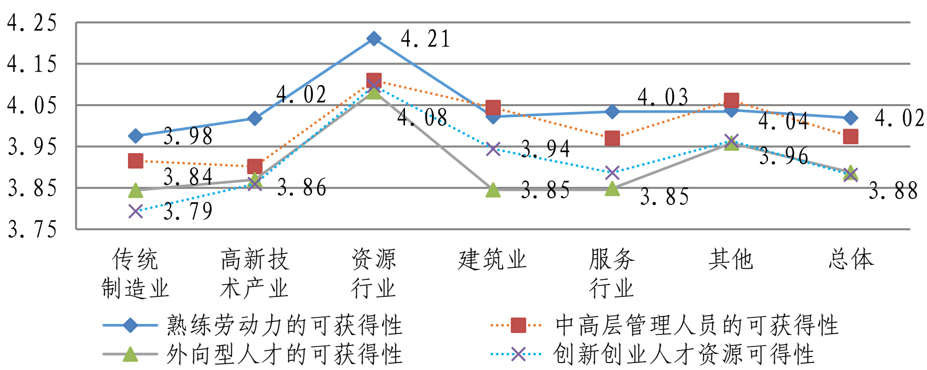

图2-68 不同行业对人力资源环境细分指标的评价图

Table 2-9 Annual average rise of labor cost in different areas (unit: %)

Ranking	Average		Maximum		Minimum	
	Area	Increase	Area	Increase	Area	Increase
1	Eastern area	9.82	Western area	510	Central area	-10.6
2	Central area	9.65	Eastern area	200	Western area	-11.0
3	Western area	8.30	Central area	80	Eastern area	-24.0
Overall	9.50		510		-24	

(3) Industry evaluations are generally low and the gap is large, the labor cost rise in the service industry is fast, and labor cost as a percentage of total cost is high in the same industry.

From an industry perspective, industry evaluations are quite different. Most industries give a score under 4.00 points. The resource industry gives the highest (4.11 points), the building industry, service industry and high-tech industry give a score between 3.90 and 3.96, and the traditional manufacturing industry gives the lowest (3.88 points), the only industry with a score below 3.90.

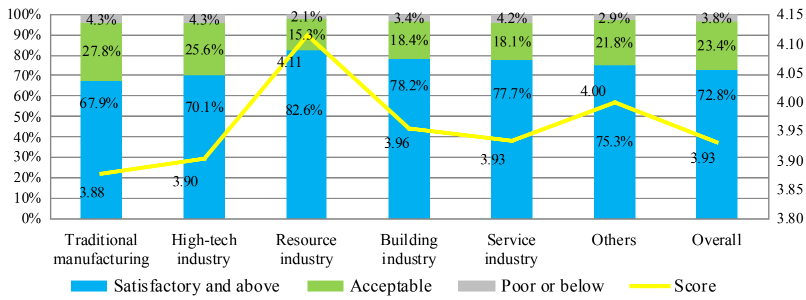

Chart 2-67 Proportion of satisfaction rate of human resources environment in different industries

From the perspective of satisfaction rate, it is low in all industries. Only the resource industry has a satisfaction rate over 80% (82.60%), while all the rest industries have a satisfaction rate below 80%. The traditional manufacturing industry has a rate under 70% (at only 67.90%), and the building industry, service industry, other industries and high-tech industry have a rate between 70% and 80%.

For the sub-indicators of human resources environment, the resource industry gives the highest evaluations to all the sub-indicators, with the highest score given to availability of experienced labor (4.21 points). The traditional manufacturing industry gives low evaluations to the sub-indicators, among which availability of

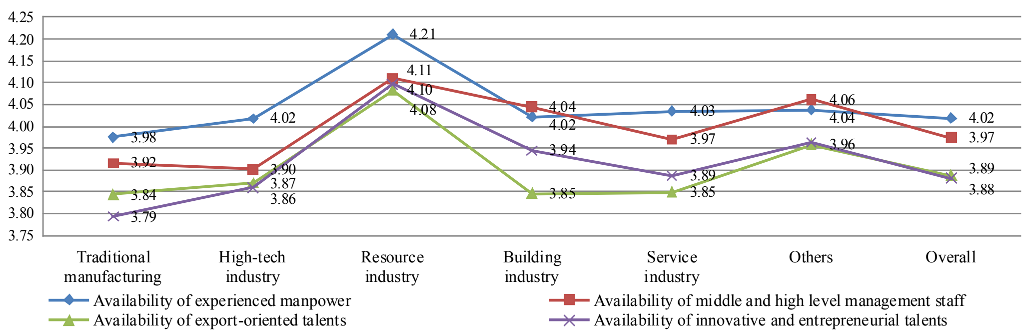

Chart 2-68 Evaluation of human resources environment sub-indicators in different industries

业人才资源可获得性评分最低（3.79分）；建筑业对各细分指标评价差异最大（差值0.19分），其他类型企业对各细分指标评价差异最小（差值0.10分）。

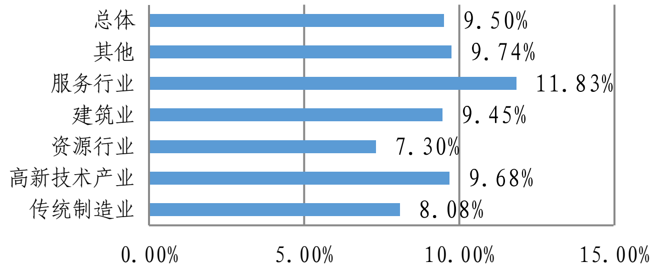

图2-69 不同行业企业对人工成本涨幅的评价

在人工成本年均上涨方面，服务行业上涨最快，达11.83%；其他行业和高新技术产业次之（分别为9.74%、9.68%），前两者均超过总体上涨水平（9.50%）；建筑业居中（9.45%）；其余行业均低于9%，资源行业涨幅最小（7.30%）。

在人工成本占总成本百分比方面，服务行业占比最高且是唯一超三成的行业（38.56%），资源行业次之（28.12%），上述两个行业占比均高于总体水平（27.64%）；传统制造业占比最低（24.14%）。

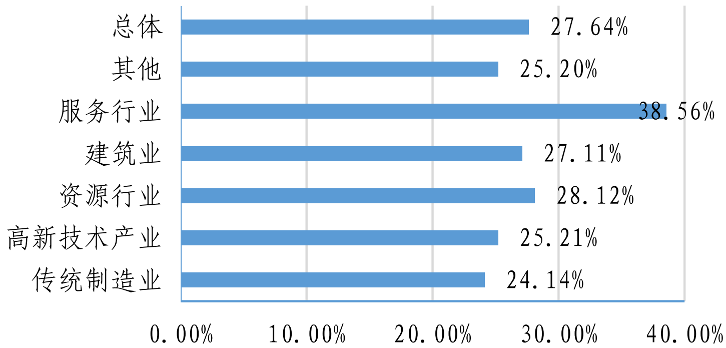

图2-70 不同行业企业人工成本占总成本百分比

（四）相比2018年，2019年人力资源环境有小幅提升

动态看，中国企业对人力资源环境评价由2018年的3.87分提升至2019年的4.02分，提高了0.15分。

1. 熟练劳动力、中高层管理人员可获得性评价提升较快，外向型人才、创新创业人才可获得性提升较慢。

从人力资源环境细分指标看，与2018年相比，2019年各项指标评价虽都有提升，但提升幅度不明显。其中，熟练劳动力的可获得性和中高层管理人员的可获得性评分提升相对较高（均提高0.08分），外向型人才的可获得性提升最不明显（仅提高0.02分）。

innovative and entrepreneurial talents gets the lowest score (3.79 points). The building industry gives the most varied scores to the sub-indicators (the difference is 0.19 points), and other industries give the least varied scores to them (the difference is 0.10 points).

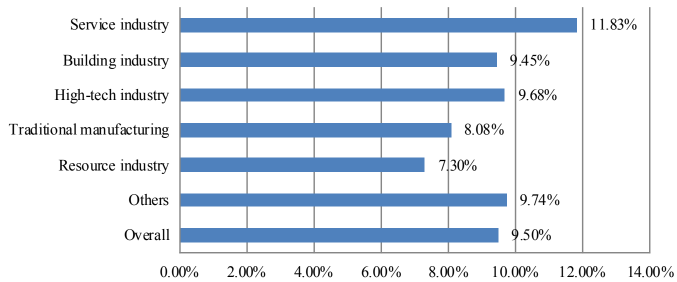

Chart 2-69 Evaluation of labor cost rise in different industries

In terms of annual average increase in labor cost, the service industry sees the fastest, reaching 11.83%, followed by other industries and high-tech industry (9.74% and 9.68% respectively), both of which exceed the overall increase (9.50%). The building industry is in the middle (9.45%). The rest industries see an increase below 9%, and the resource industry sees the smallest increase (7.30%).

In terms of labor cost as a percentage of total cost, the service industry sees the highest proportion and is the only industry with a proportion over 30% (38.56%), followed by the resource industry (28.12%), both of which exceed the overall level (27.64%). The traditional manufacturing industry has the lowest proportion (24.14%).

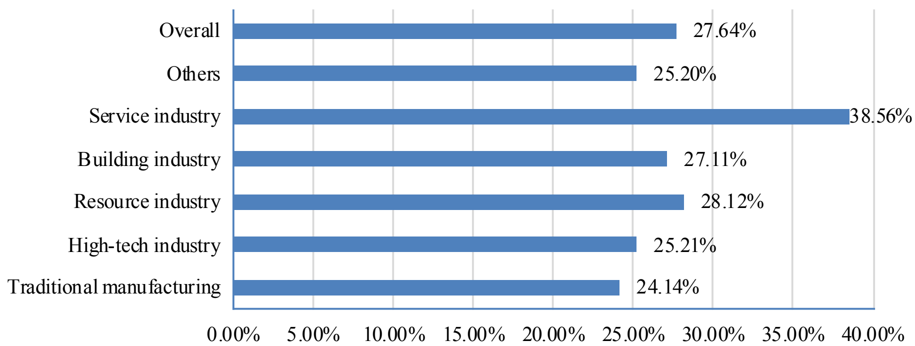

Chart 2-70 Percentage of labor cost in total cost in different

(4) Compared with 2018, human resources environment has slightly improved in 2019.

Dynamically, the overall score of human resources environment has increased from 3.87 points in 2018 to 4.02 points in 2019, an increase of 0.15 points.

1. Evaluations of availability of experienced manpower and availability of middle and high level management staff see a relatively fast increase, and evaluations of availability of export-oriented talents and availability of innovative and entrepreneurial talents see a slow increase.

For the sub-indicators of human resources environment, compared with 2018, although the evaluations of the sub-indicators have improved in 2019, increases are not obvious. Increases in availability of experienced labor and availability of middle and high level managers are relatively big (both by 0.08 points), and the increase in availability of export-oriented talents is the least significant (only by 0.02 points).

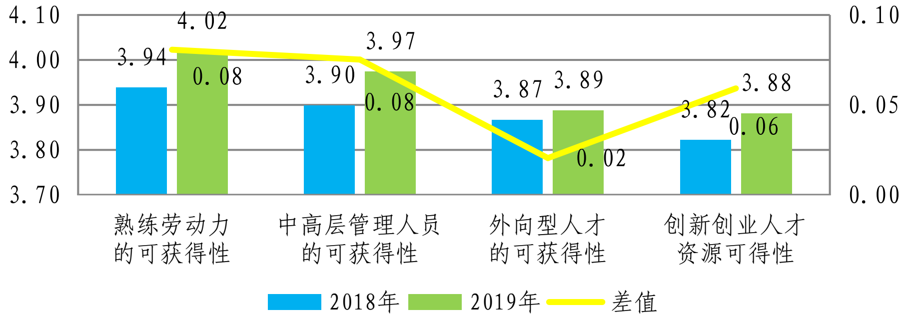

图2-71 人力资源环境细分指标年度评价对比图

2. 东部、西部企业评价有所提升，中部略有下降。

从不同地区角度看，大部分地区评价有所提升。其中，西部提升最明显，由2018年的3.74分提至2019年的3.89分，提高了0.15分；东部次之，提高0.05分；中部则呈现下降特点，由2018年的3.99分降至2019年的3.95分，下降了0.04分。

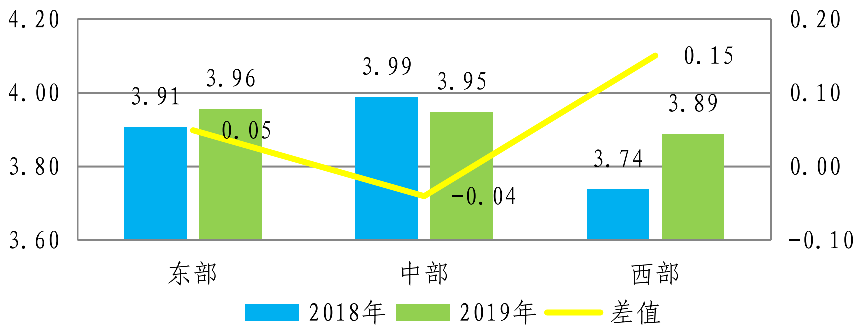

图2-72 人力资源环境不同地区年度评价对比图

3. 各行业评价均有所提升，高新技术产业提升不明显。

从行业角度看，相比2018年，2019年资源行业和服务行业评价提升最明显，均提高了0.21分；其他行业次之，提高了0.17分；高新技术产业提升不明显，仅提高0.05分。

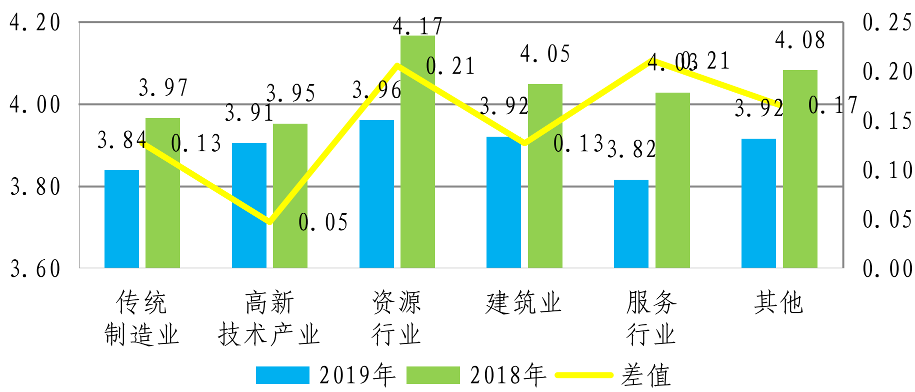

图2-73 人力资源环境不同行业年度评价对比图

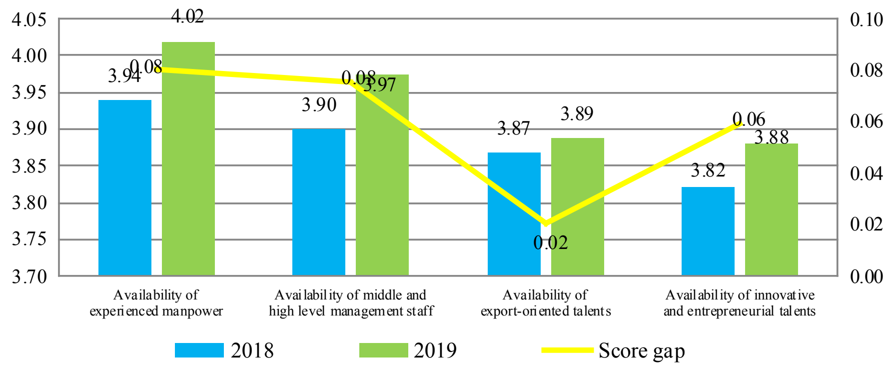

Chart 2-71 Comparison of annual evaluation of human resources environmentsub-indicators

2. Evaluations by enterprises in the eastern and western areas have improved, and the evaluation in the central area has slightly declined.

From a regional perspective, evaluations have improved in most areas. The increase in the west is the most obvious, from 3.74 points in 2018 to 3.89 points in 2019, an increase of 0.15 points, followed by the east, up by 0.05 points. The central area sees a decline, from 3.99 points in 2018 to 3.95 points in 2019, down by 0.04 points.

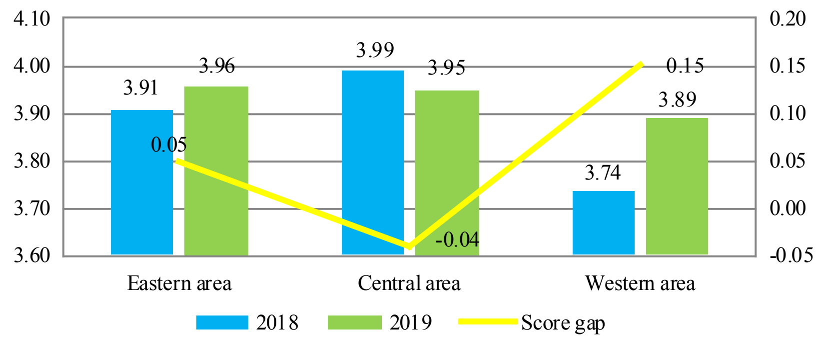

Chart 2-72 Comparison of annual evaluation of human resources environment in different areas

3. Evaluations in various industries have improved, and the improvement in the high-tech industry is not obvious.

From an industry perspective, compared with 2018, the increases in the evaluations by the resource industry and service industry in 2019 are the most obvious, both up by 0.21 points, followed by other industries, up by 0.17 points. The improvement in the high-tech industry is not obvious, only up by 0.05 points.

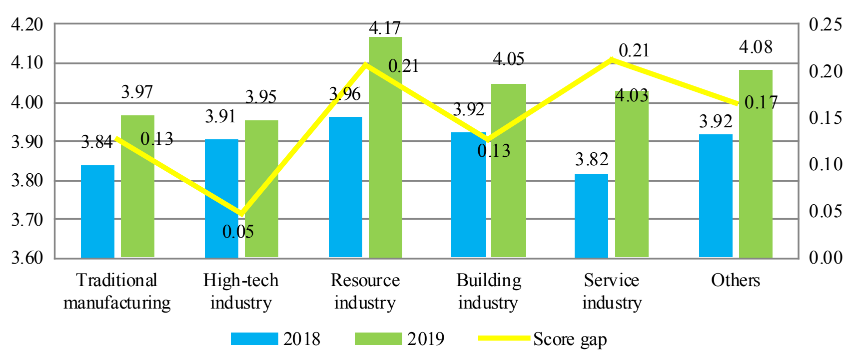

Chart 2-73 Comparison of annual evaluation of human resources environment in different industries

九、金融服务环境评价不高

金融服务环境细分为融资便利性、融资渠道多元化及利润汇出自由度三个二级指标。2019 年受访企业对金融服务环境总体评价较低，但与 2018 年相比总体趋势向好。

（一）企业对金融服务环境各指标评价较均衡，但普遍偏低

企业问卷调查显示，2019 年金融服务环境总体评价较低（4.133 分），低于营商环境总体评价，在 12 个一级指标中，仅高于人力资源环境评价，位居第 11 位。从细分指标看，利润汇出自由度评价均值略高（4.16 分），融资便利性次之（4.04 分），融资渠道多元化略低（4.03 分），最高与最低值相差 0.13 分。

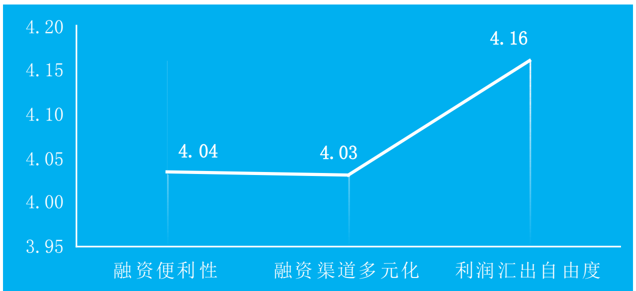

图2-74 金融服务环境细分指标评价图

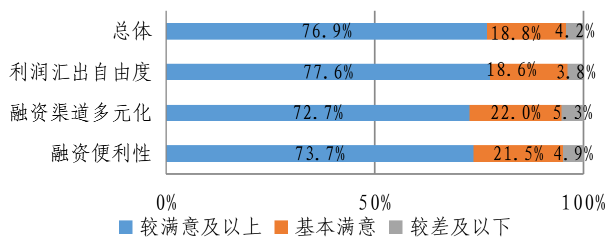

图2-75 金融服务环境细分指标满意度占比图

从企业满意度看，较满意及以上企业占比不足八成，其中，利润汇出自由度满意度最高，较满意及以上占比为 77.60%；融资渠道多元化满意度最低，较满意及以上占比为 72.70%；评价一般的企业占比较高，各细分指标评价一般企业均在 18%-22% 之间。

（二）东、中、西部地区评价依次递减，融资成本有所下降

从地区角度看，各地区企业对金融服务环境评价呈现东、中、西部依次递减的特点。其中，东部最高（4.08 分）、中部居中（4.01 分），西部最低（3.98 分）。

从企业满意度看，各地区满意度评价较均衡且偏低，较满意及以上企业占比均低于八成，其中，东部最高（78.20%），西部次之（76.20%），中部最低（75.90%）。

IX. Evaluation result of financial service environment is not good

Financial service environment sub-indicators include the three secondary indicators of ease of financing, diversity of financing channels and liberty in remittance of profits. In 2019, the overall score of financial service environment is low, but the overall trend is better than that in 2018.

(1) Evaluations of various sub-indicators of financial service environment are relatively balanced, but are generally low.

According to questionnaire surveys among enterprises, the overall score of financial service environment in 2019 is low (4.133 points), lower than the overall score of China's business environment. Among the 12 first-level indicators, it ranks 11th, only higher than the score of human resources environment. Regarding the sub-indicators, the average value of liberty in remittance of profits is slightly higher (4.16 points), followed by ease of financing (4.04 points). The diversity of financing channels has a slightly lower score (4.03 points), 0.13 points away from the highest value.

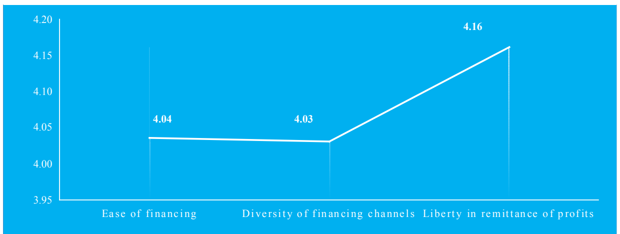

Chart 2-74 Evaluation of financial service environmentt sub-indicators

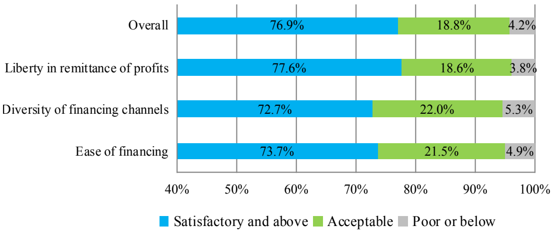

Chart 2-75 Proportion of satisfaction rate of financial service environment sub-indicators

From the perspective of satisfaction rate, it is less than 80%. Liberty in remittance of profits has the highest satisfaction rate of 77.60%, and diversity of financing channels has the lowest, at 72.70%. The proportion of enterprises giving a "fair" evaluation is high, between 18% and 22% for every sub-indicator.

(2) Evaluations decline from eastern, central to western areas, and financing cost has decreased.

From a regional perspective, evaluations decline from eastern, central to western areas. The highest evaluation is in the east (4.08 points), followed by a mid-level score in the central area (4.01 points), and the lowest is in the west (3.98 points).

From the perspective of satisfaction rate, different areas have similar but low satisfaction rates, all below 80%. The east has the highest (78.20%), followed by the west (76.20%), and the central area has the lowest (75.90%).

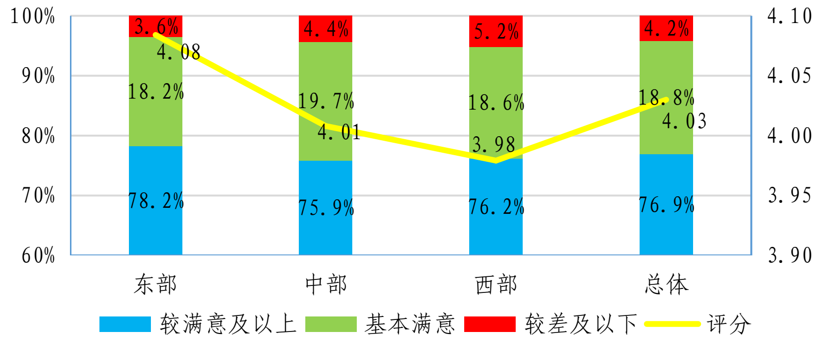

图2-76 各地区对金融服务环境综合评价图

从金融服务环境细分指标看，东部对融资便利性和融资渠道多元化评价最高（分别为4.07分、4.09分），中部对利润汇出自由度评价最高（4.24分）；西部对各项指标评价最低，其中对融资渠道多元化评分最低（3.96分）；在细分指标中，各地区对利润汇出自由度评价差异最大（0.24分），其中，中部最高，西部最低；融资便利性差异相对较小（0.07分）。

表2-10 各地区对金融服务环境细分指标的评价

排序	融资便利性		融资渠道多元化		利润汇出自由度		金融服务环境
	地区	得分	地区	得分	地区	得分	
1	东部	4.07	东部	4.09	中部	4.24	东部
2	中部	4.01	中部	4.00	东部	4.21	中部
3	西部	4.00	西部	3.96	西部	4.00	西部

各地区企业融资成本率相差不大且东、中、西部呈现V型特点。其中，东部最高（15.91%），西部居中（14.19%），中部最低（13.65%）；与2018年相比，2019年总体融资成本率出现下降，由2018年的17.68%降至2019年的14.86%，降低了2.82%。在极大值方面，西部企业反映最高（304%），中部最低（80%）。

表2-11 各地区融资成本率分布（单位：%）

排序	均值		极大值		极小值	
	地区	融资成本率	地区	融资成本率	地区	融资成本率
1	东部	15.91	西部	304	东部	0.01
2	西部	14.19	东部	90	西部	0.01
3	中部	13.65	中部	80	中部	-0.50
总体	14.86		304		-0.50	

（三）传统制造业和高新技术产业评价较高，资源行业评价较低

从行业角度看，各行业评价差异较大。其中，传统制造业评价最高（4.18分），高新技术产业次之（4.16分），服务行业和建筑业评价居中（分别为4.05分、4.00分），其他行业和资源行业评价较低（分别为3.91分、3.79分）。

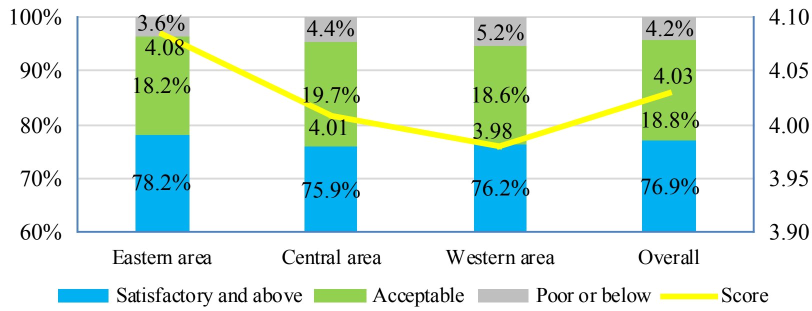

Chart 2-76 Comprehensive evaluation of financial service environment in different areas

Regarding financial service sub-indicators, the east gives the highest scores to ease of financing and diversity of financing channels (4.07 points and 4.09 points respectively), the central area gives the highest score to liberty in remittance of profits (4.24 points), and the west gives the lowest scores to all the sub-indicators, with diversity of financing channels getting the lowest (3.96 points). Among the sub-indicators, liberty in remittance of profits gets the most varied scores from all areas (the difference is 0.24 points), in which the highest score is from the central area and the lowest is from the west. Ease of financing gets less varied scores (the difference is 0.07 points).

Table 2-10 Evaluation of financial service environment sub-indicators in different areas

Ranking	Ease of financing		Diversity of financing channels		Liberty in remittance of profits		Financial service environment
	Area	Score	Area	Score	Area	Score	
1	Eastern area	4.07	Eastern area	4.09	Central area	4.24	Eastern area
2	Central area	4.01	Central area	4.00	Eastern area	4.21	Central area
3	Western area	4.00	Western area	3.96	Western area	4.00	Western area

The financing cost rates of enterprises in different areas are not that different, and show a V shape in eastern, central and western areas. The east has the highest financing cost rate (15.91%), followed by the west (14.19%), and the central area has the lowest (13.65%). Compared with 2018, the overall financing cost rate in 2019 has decreased from 17.68% in 2018 to 14.86 in 2019, down by 2.82%. In terms of the maximum value, it is the highest in the west (304%) and the lowest in the central area (80%).

Table 2-11 Distribution of financing cost rates in different areas (unit: %)

Ranking	Average		Maximum		Minimum	
	Area	Financing cost rate	Area	Financing cost rate	Area	Financing cost rate
1	Eastern area	15.91	Western area	304	Eastern area	0.01
2	Western area	14.19	Eastern area	90	Western area	0.01
3	Central area	13.65	Central area	80	Central area	-0.50
Overall	14.86		304		-0.50	

(3) Evaluations are higher in traditional manufacturing and high-tech industry, and lower in resource industry.

From an industry perspective, evaluations are quite different. The traditional manufacturing industry gives the highest evaluation (4.18 points), followed by the high-tech industry (4.16 points). The service industry and building industry are in the middle (4.05 points and 4.00 points respectively), and other industries and resource industry give lower evaluations (respectively at 3.91 points and 3.79 points).

从企业满意度看，各行业满意度较低，较满意及以上企业占比均低于 75.00%；评价一般者占比均超二成，其中建筑业超三成（30.80%）；传统制造业较满意及以上占比最高（74.80%），建筑业（65.40%）和资源行业（64.30%）均不足七成。

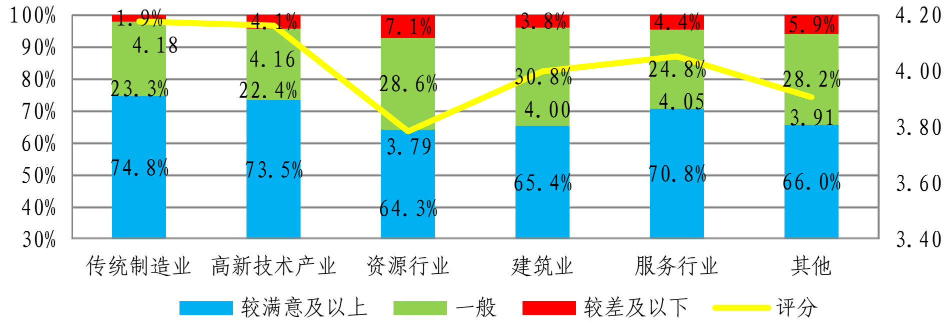

图2-77 不同行业对金融服务环境的评价图

从金融服务环境细分指标看，各行业评价差异巨大。其中，高新技术产业对融资便利性、传统制造业对融资渠道多元化评价最高（分别为 4.15 分、4.13 分），服务行业评价最低（分别为 3.87 分、3.84 分）；各行业对利润汇出自由度评价差异最大，其中，传统制造业评价最高（4.16 分），资源行业评价最低（3.57 分），接近“一般”水平，两者相差 0.59 分。

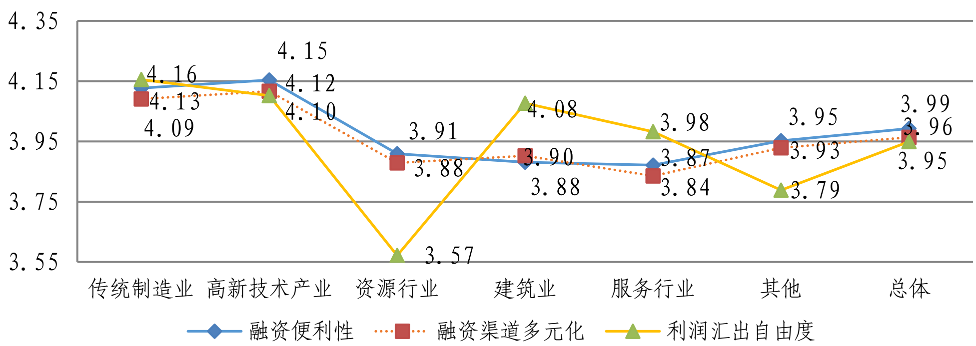

图2-78 不同行业金融服务环境细分指标评价图

在融资成本率方面，各行业差距较大。从均值看，资源行业平均融资成本率最高（21.86%），服务行业次之（19.92%）；高新技术产业居中（15.02%），传统制造业较低（12.63%）；建筑业最低（12.49%），与最高值相差 9.37 个百分点。

In terms of satisfaction rate, it is low in every industry, less than 75.00%. The proportion of enterprises giving a “fair” evaluation is over 20% in every industry, and exceeds 30% (30.80%) in the building industry. Traditional manufacturing has the highest satisfaction rate of 74.80%, while building industry (65.40%) and resource industry (64.30%) are less than 70%.

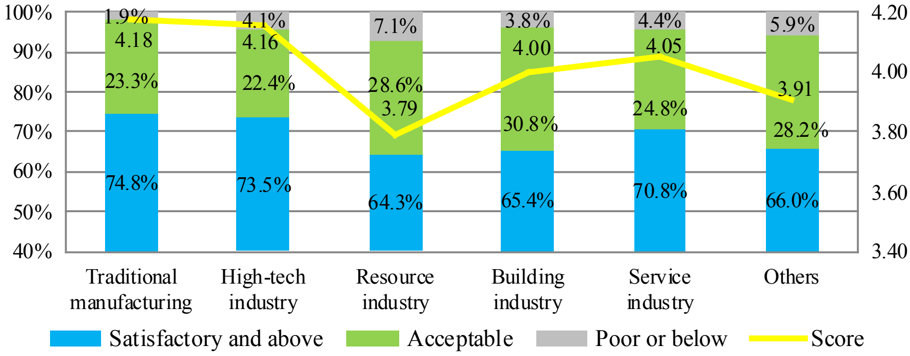

Chart 2-77 Evaluation of financial service environment in different industries

Seen from financial service sub-indicators, industry evaluations differ greatly. The high-tech industry gives the highest score to ease of financing and the traditional manufacturing industry gives the highest to diversity of financing channels (4.15 points and 4.13 points respectively), and the service industry gives the lowest evaluations (3.87 points and 3.84 points respectively). Liberty in remittance of profits gets the most varied industry evaluations, in which the highest score is from the traditional manufacturing industry (4.16 points) and the lowest is from the resource industry (3.57 points), close to “fair”, and the difference between the two is 0.59 points.

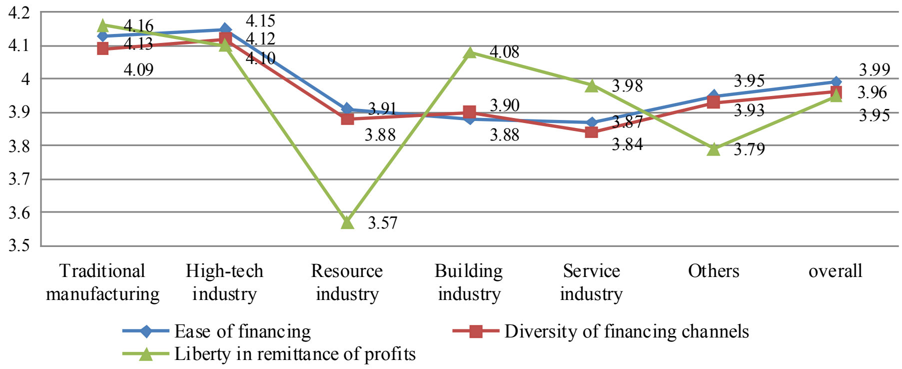

Chart 2-78 Evaluation of financial service environment sub-indicators in different industries

In terms of financing cost rate, industries differ greatly. Seen from the average value, the average financing cost rate of the resource industry is the highest (21.86%), followed by the service industry (19.92%). The high-tech industry is in the middle (15.02%), the traditional manufacturing industry is lower (12.63%), and the building industry is the lowest (12.49%), 9.37 percentage points away from the highest value.

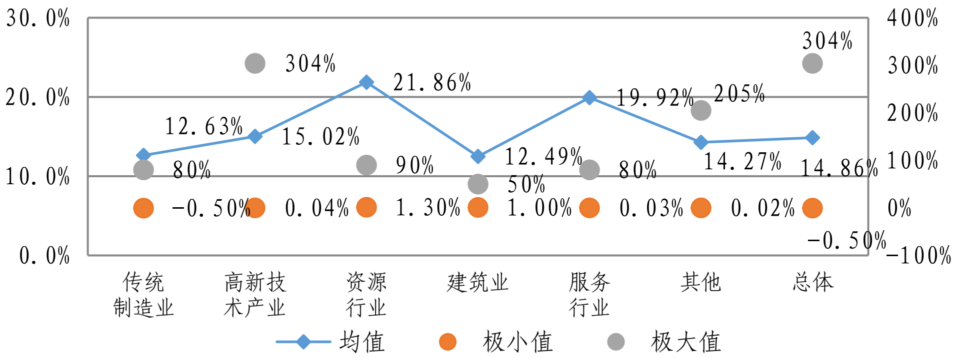

图2-79 不同行业企业融资成本率图

（四）金融服务环境趋势向好，中部企业评价有所下降

动态看，与2018年3.93分相比，2019年企业对金融服务环境总体评价提高0.20分，达到4.13分，提升5.17%。

1. 金融服务环境各项细分指标评价均有提升。

从金融服务环境细分指标看，相比2018年，2019年融资渠道多元化由2018年3.93分提至2019年4.03分，提高0.10分；融资便利性评价也有小幅提升，由3.94分提升至4.04分，提高0.09分。

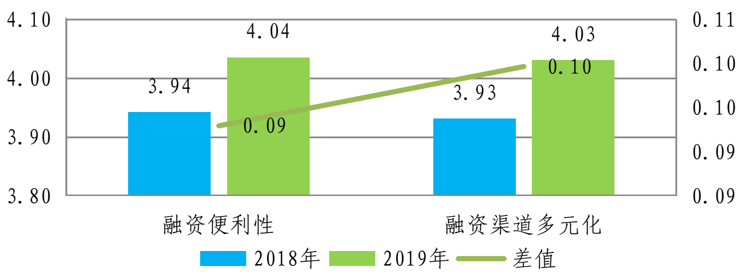

图2-80 金融服务环境细分指标年度评价对比图

2. 地区企业评价提升幅度呈“东西高、中部低”的特征。

从地区角度看，与2018年相比，2019年各地区企业评价提升幅度呈“两头高、中间低”的特征。其中，西部提升幅度最大，由2018年的3.81分提至2019年的3.98分，提高0.17

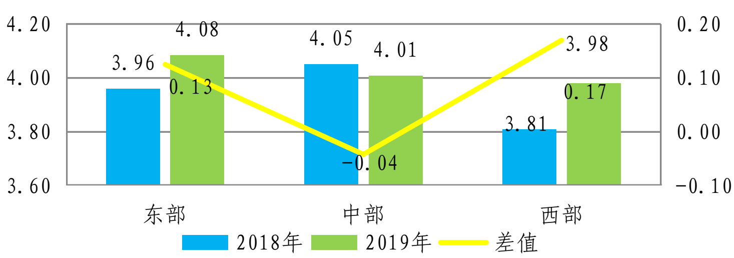

图2-81 金融服务环境不同地区年度评价对比图

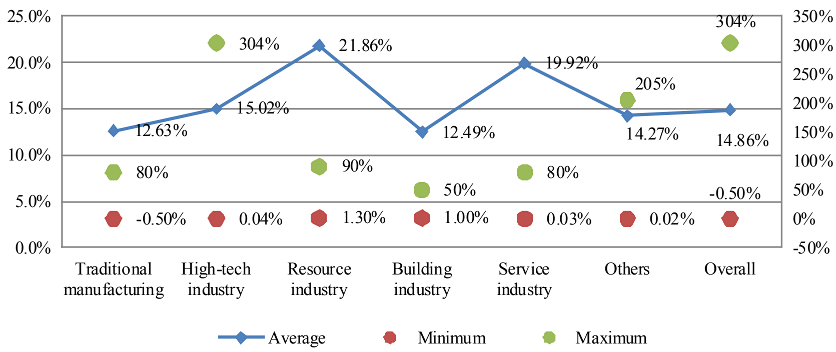

Chart 2-79 Financing cost rate in different industries

(4) Financial service environment is improving, and the evaluation by the central area has declined.

Dynamically, compared with the 3.93 points in 2018, the overall score of financial service environment in 2019 has increased by 0.20 points, reaching 4.13 points, up by 5.17%.

1. Evaluations of the sub-indicators of financial service environment have all improved.

For financial service sub-indicators, compared with 2018, diversity of financing channels in 2019 gets 4.03 points in 2019, an increase of 0.10 points from the 3.93 points in 2018. The score of ease of financing has also slightly increased, from 3.94 points to 4.04 points, up by 0.09 points.

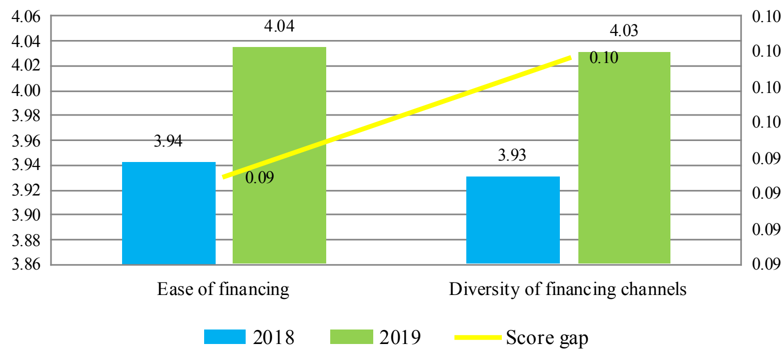

Chart 2-80 Comparison of annual evaluation of financial service environment sub-indicators

2. Increases in evaluations show a V shape in eastern, central and western areas.

From a regional perspective, compared with 2018, increases in evaluations in 2019 show a V shape in eastern, central and western areas. The west contributes the largest increase, from 3.81 points in 2018 to 3.98

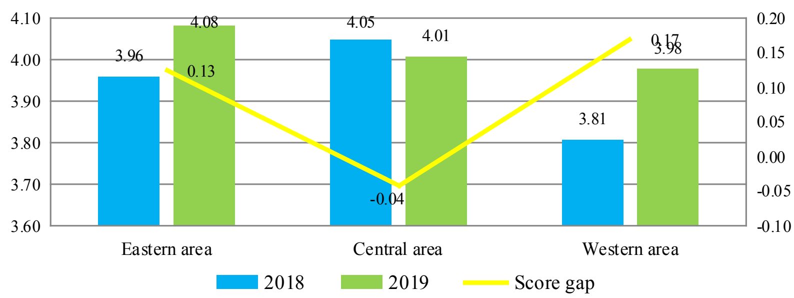

Chart 2-81 Comparison of annual evaluation of financial service environment in different areas

分；东部次之（提高 0.13 分）；中部企业评价与东、西部相反，是唯一评分下降的地区，由 2018 年的 4.05 分降至 2019 年的 4.01 分，下降了 0.04 分。

3. 资源行业对金融服务环境评价提升幅度最明显。

从行业角度看，各行业对金融服务环境评价均提高 0.10 分及以上，其中，资源行业提升幅度最明显，由 2018 年的 3.86 分提至 2019 年的 4.27 分，提高了 0.41 分；建筑业次之（提高 0.34 分）；高新技术产业提升幅度最小（仅提高 0.10 分）；其余行业提升幅度在 0.16 分 -0.29 分之间。

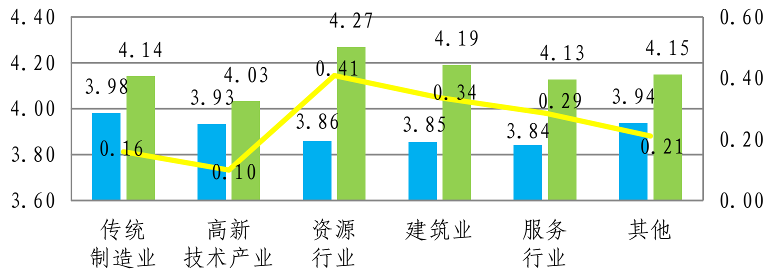

图2-82 金融服务环境不同行业年度评价对比图

4. 各类企业评价均有所提升，其他类型企业提升幅度最大。

从不同所有制角度看，与 2018 年相比，2019 年各类企业均有不同程度提升。其中，其他类型企业提升最大，由 2018 年的 3.81 分提至 2019 年的 4.22 分，提高 0.41 分；中外合资、合作企业次之，提高 0.22 分；其余企业均低于 0.20 分，国有企业仅提高 0.13 分。

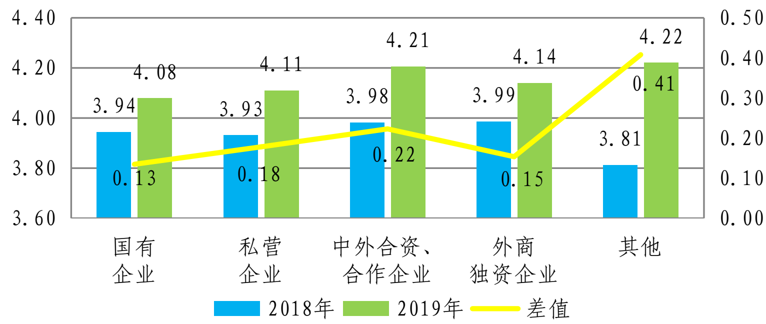

图2-83 金融服务环境不同所有制企业年度评价对比图

十、财税服务环境显著优化

财税服务环境细分为财税执法规范性、申退税办理时间两个二级指标。2019 年受访企业对财税服务环境总体评价提升显著，在 12 个一级指标中排名上升最快，财税执法规范性获得较高认可。

points in 2019, up by 0.17 points, followed by the east (an increase of 0.13 points), and the central area is the opposite, with the score falling from 4.05 points in 2018 to 4.01 points in 2019, down by 0.04 points.

3. The resource industry contributes the most obvious improvement in the evaluation of financial service environment.

From an industry perspective, industry evaluations have all increased by 0.10 points and above. The resource industry sees the most obvious improvement, from 3.86 points in 2018 to 4.27 points in 2019, an increase of 0.41 points, followed by the building industry (by 0.34), and the high-tech industry sees the smallest increase (only by 0.10 points). The rest industries see increases between 0.16 points and 0.29 points.

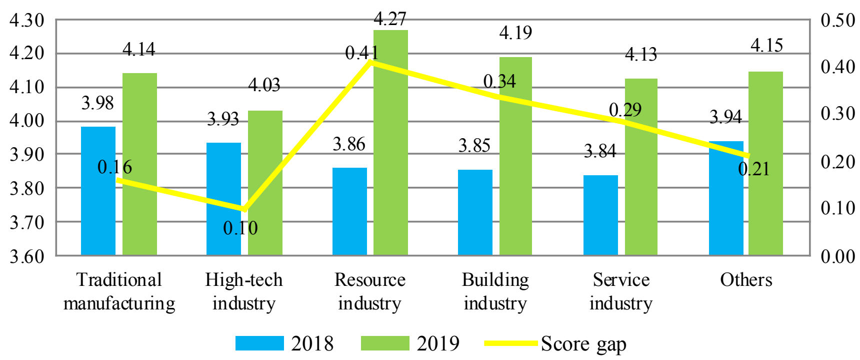

Chart 2-82 Comparison of annual evaluation of financial service environment in different industries

4. All types of enterprises have given higher evaluations, and other types of enterprises see the largest increase.

In enterprises of different natures, compared with 2018, all have given higher scores in 2019 to different degrees. Other types of enterprises contribute the biggest increase, from 3.81 points in 2018 to 4.22 points in 2019, an increase of 0.41 points, followed by Sino-foreign JVs and cooperative enterprises (by 0.22 points), and the rest types of enterprises see increases below 0.20 points, with state-owned enterprises seeing a small increase of 0.13 points.

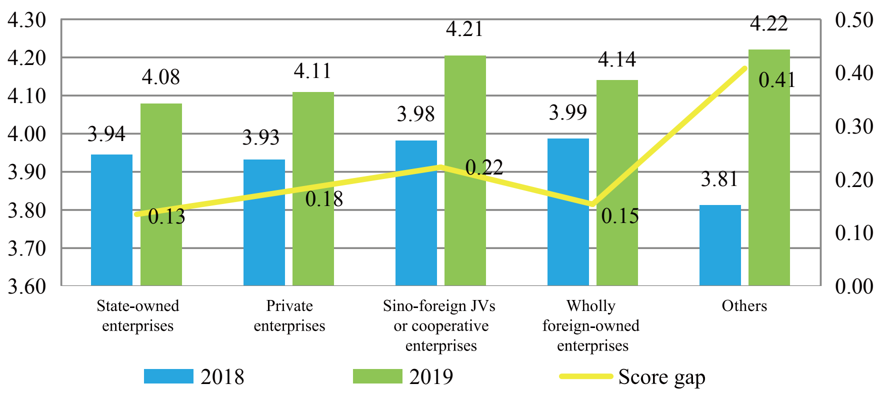

Chart 2-83 Comparison of annual evaluation of financial service environment in enterprises of different natures

X. Fiscal and tax service environment is significantly optimized

Fiscal and tax service environment sub-indicators include the two secondary indicators of standardized fiscal and taxation law enforcement and tax refund application handling time. In 2019, the overall score of fiscal and tax service environment has significantly increased, and sees the fastest rise of position in the rankings of the 12 first-level indicators. Standardized fiscal and taxation law enforcement is highly recognized.

（一）财税服务环境满意度评价较高

财税服务环境总体评价为 4.425 分，仅次于口岸服务环境，在 12 个一级指标中位居第二。从细分指标看，各项细分指标评价均较高，其中，财税执法规范性评价（4.49 分）高于申退税办理时间（4.40 分）。

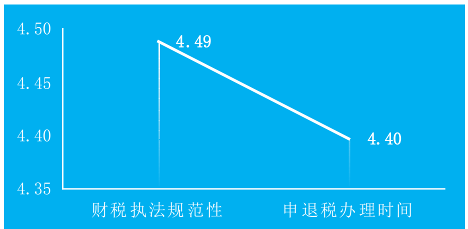

图2-84 财税服务环境细分指标评价图

从企业满意度看，财税服务环境满意度非常高。其中，较满意及以上企业超九成，企业占比高达 93.90%。从细分指标看，财税执法规范性较满意及以上占比为 93.00%，申退税办理时间为 86.70%。

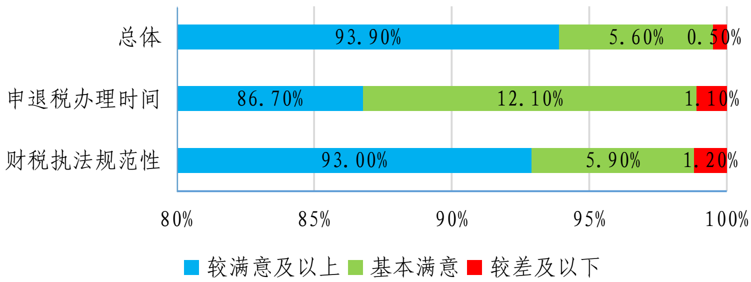

图2-85 财税服务环境细分指标满意度图

企业问卷调查显示，企业税费缴纳次数平均为 15.23 次 / 年，税费缴纳耗时平均 18.14 小时，出口退税到账平均时间为 15.88 小时；与 2018 年相比，2019 年企业税费下降明显，其中，2018 年企业总费率（20.35%）是 2019 年（9.76%）的 2.09 倍；2018 年企业总税率（32.25%）是 2019 年（10.62%）的 3.04 倍。

（二）各地区较满意及以上企业占比均超九成，东部财税环境优势明显

从不同地区角度看，各地区对财税服务环境的评价均较高。其中，中部评价最高，达 4.53 分，属于“非常满意”水平；东部也较高，达 4.46 分，接近“非常满意”水平；西部略低，为 4.36 分。

从企业满意度看，各地区满意度均较高，较满意及以上企业占比超九成。其中，中部满意度最高，较满意及以上企业占比高达 95.50%；东部次之，为 95%；西部为 90%。

(1) Fiscal and tax service environment has a high satisfaction rate.

The overall score of fiscal and tax service environment is 4.425 points, second only to port service environment, ranking second among the 12 first-level indicators. For the sub-indicators, the evaluations are high, and standardized fiscal and taxation law enforcement gets a higher score (4.49 points) than tax refund application handling time (4.40 points).

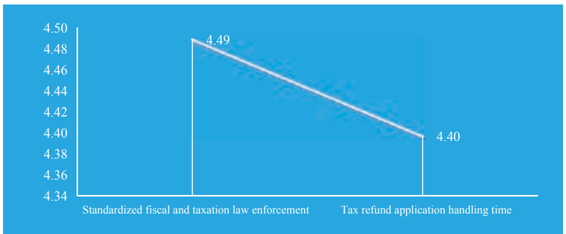

Chart 2-84 Evaluation of fiscal and tax service environment sub-indicators

Regarding satisfaction rate, fiscal and tax service environment enjoys a very high satisfaction rate. More than 90% (as high as 93.90%) of enterprises consider it satisfactory and above. For the sub-indicators, standardized fiscal and taxation law enforcement has a satisfaction rate of 93.00% and tax refund application handling time has a rate of 86.70%.

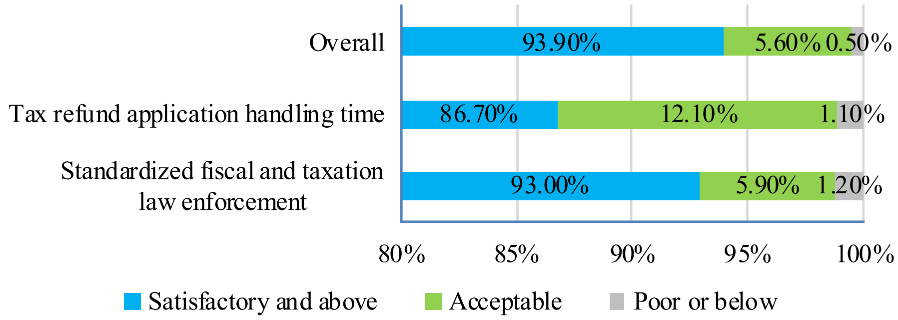

Chart 2-85 Proportion of satisfaction rate of fiscal and tax service environment sub-indicators

According to questionnaire surveys among enterprises, the average frequency of payment of taxes and fees is 15.23 times/year, the average time spent on tax and fee payment is 18.14 hours, and the average time for export tax rebates to be received is 15.88 hours. Compared with 2018, taxes and fees in 2019 h ave dropped significantly. The total fee rate in 2018 (20.35%) is 2.09 times that in 2019 (9.76%), and the total tax rate in 2018 (32.25%) is 3.04 times that in 2019 (10.62%).

(2) Satisfaction rates in all areas are above 90%, and the eastern area has obvious advantages in fiscal and tax service environment.

From a regional perspective, evaluations of fiscal and tax service environment are high in all areas. The central area gives the highest, reaching 4.53 points, which means “very satisfactory”, the east also gives a high score of 4.46 points, close to “very satisfactory”, and the west gives a slightly lower score of 4.36 points.

From the perspective of satisfaction rate, it is high in all areas and exceeds 90%. The central area is the most satisfied, with a satisfaction rate of 95.50%, followed by the east at 95%, and the west has a rate of 90%.

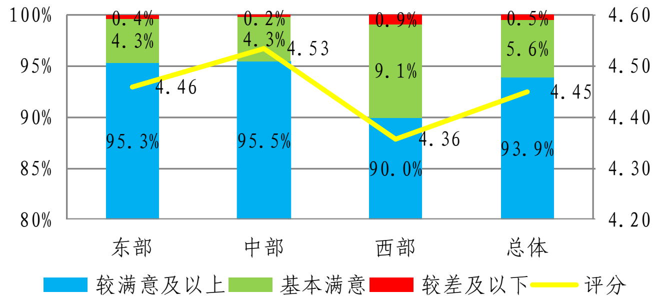

图2-86 各地区对财税服务环境评价图

从财税服务环境细分指标评价看，各地区评价差异不大（差值在 0.07 分 -0.14 分之间）。各地区对财税执法规范性的评价均为最高，其中，中部（4.57 分）和东部（4.50 分）企业评价均属于“非常满意”水平；大部分地区对各项细分指标评价均高于 4.40 分，仅西部企业对申退税办理时间评价为 4.27 分。

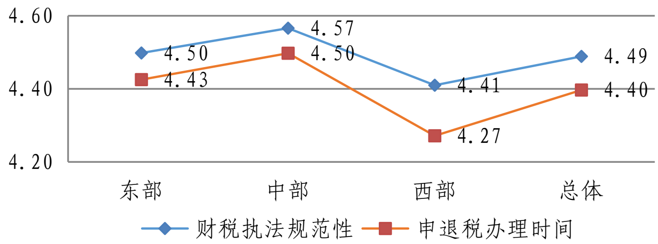

图2-87 各地区对财税服务环境细分指标评价图

各地区总费率和总税率差异较大，总税率波动幅度较大，总费率幅度较小。从总费率均值看，中部最高（12.62%），东部最低（8.48%）。从总税率均值看，最高为西部（11.64%），高于总体均值，东部最低（8.33%）。从税费水平看，东部财税环境优势明显，西部居中，中部评价较低。

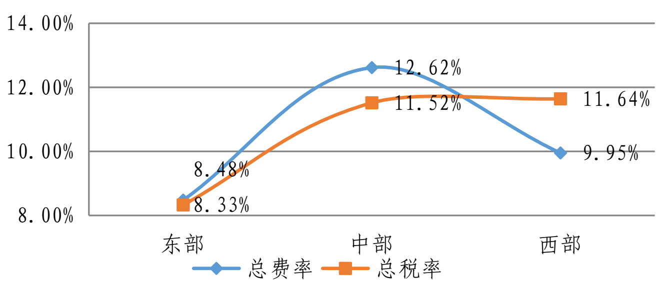

图2-88 各地区平均总费率与总税率

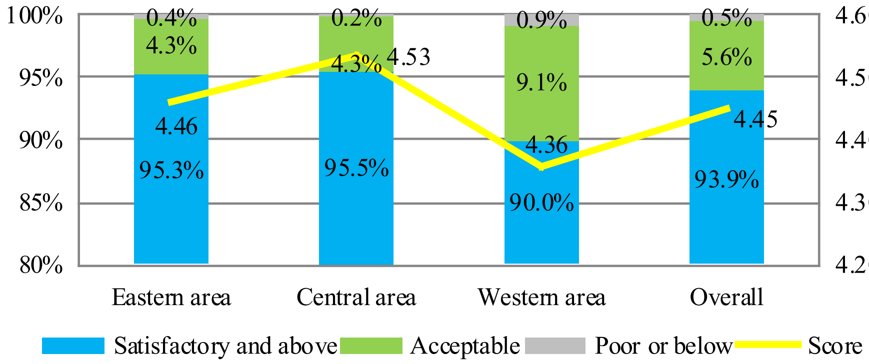

Chart 2-86 Evaluation of fiscal and tax service environment in different areas

For the sub-indicators of fiscal and tax service environment, regional evaluations are not that different (differences are between 0.07 and 0.14). All areas give standardized fiscal and taxation law enforcement the highest scores, with the central area giving 4.57 points and the eastern area giving 4.50 points, both of which mean "very satisfactory". Most areas give scores above 4.40 to the sub-indicators, and only the west gives 4.27 points to tax refund application handling time.

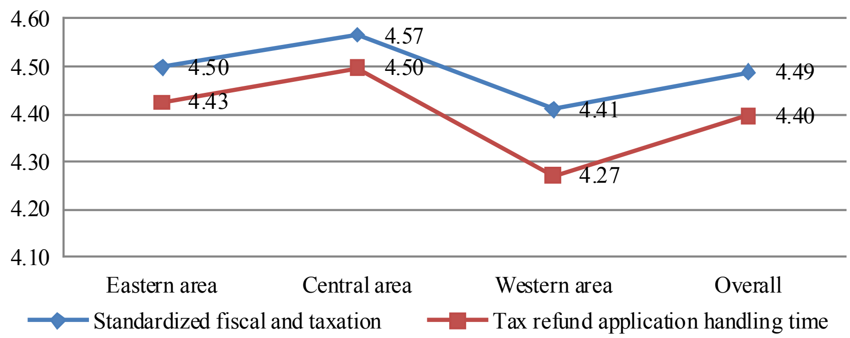

Chart 2-87 Evaluation of fiscal and tax service environment sub-indicators in different areas

The total fee rate and total tax rate vary greatly among regions. The total tax rate fluctuates greatly, while the total fee rate fluctuates in a small range. Based on the average total fee rate, the highest is in the central area (12.62%) and the lowest is in the eastern area (8.48%). Based on the average total tax rate, the highest is in the west (11.64%), higher than the overall average, and the lowest is in the east (8.33%). From the perspective of tax and fee levels, the east has clear advantages, followed by the west, and the central area gives a lower evaluation.

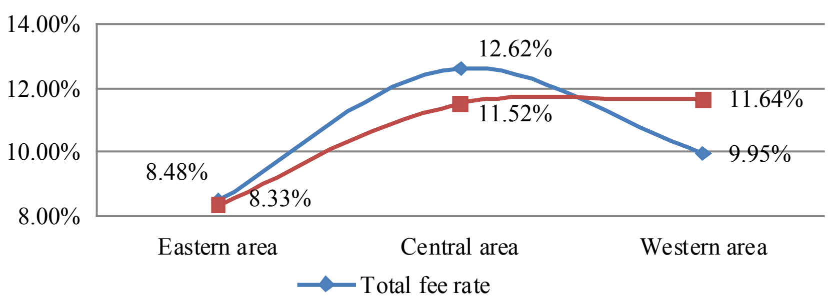

Chart 2-88 Average total fee rate and tax rate in different areas

（三）财税执法规范性获好评，传统制造业、高新技术产业评价较高

从行业角度看，传统制造业评价最高（4.50 分），属于“非常满意”水平；高新技术产业和资源行业评价次之（均为 4.48 分），接近“非常满意”水平；服务行业和建筑业相对较低（分别为 4.39 分、4.36 分）。

从企业满意度评价看，大部分行业较满意及以上企业占比超九成。其中，资源行业占比高达 97.80%，满意度最高；传统制造业次之（95.50%）；建筑业（89.90%）相对较低，是唯一低于九成的行业；其余行业在 90%-95% 之间。

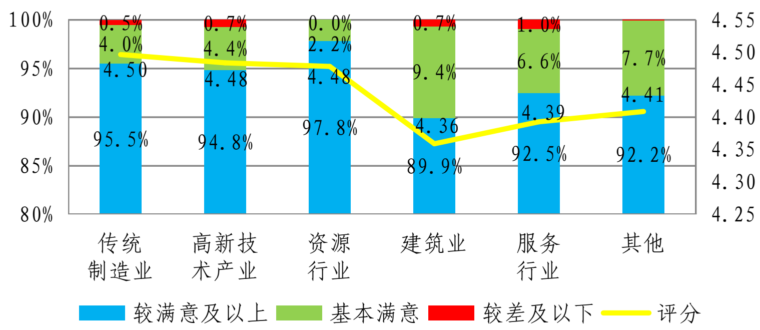

图2-89 不同行业对财税服务环境满意度占比图

从财税服务环境细分指标看，传统制造业对财税执法规范性评价最高（4.42 分），高新技术产业对申退税办理时间评价最高（4.41 分），建筑业对各项指标评价均为最低（4.08 分、4.02 分）；各行业对财税执法规范性评价均为最高。

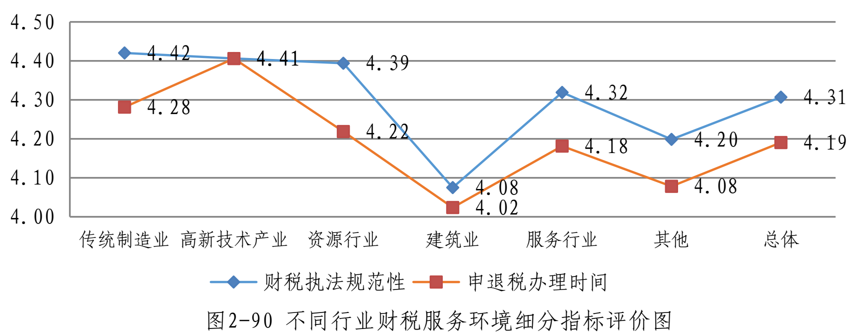

图2-90 不同行业财税服务环境细分指标评价图

从税费缴纳次数看，建筑业平均缴纳次数最多，达 20.91 次；资源行业最少，仅 12.81 次；高新技术产业最高，极大值为 960 小时。从税费缴纳耗时看，高新技术产业均值最高，为 32.73 小时，极大值高达到 1440 小时；建筑业耗时最少，为 11.57 小时。

(3) Standardized fiscal and taxation law enforcement is well recognized, and the traditional manufacturing industry and high-tech industry give high evaluations.

From an industry perspective, the traditional manufacturing industry gives the highest evaluation (4.50 points), which means "very satisfactory", followed by the high-tech industry and resource industry (both at 4.48 points), close to "very satisfactory". The service industry and building industry give relatively low scores (4.39 and 4.36 respectively).

Regarding satisfaction rate, it is over 90% in most industries. The resource industry has the highest satisfaction rate of 97.80%, followed by the traditional manufacturing industry (95.50%). The building industry has a relatively low rate (89.90%), the only industry below 90%. The rest industries are between 90% and 95%.

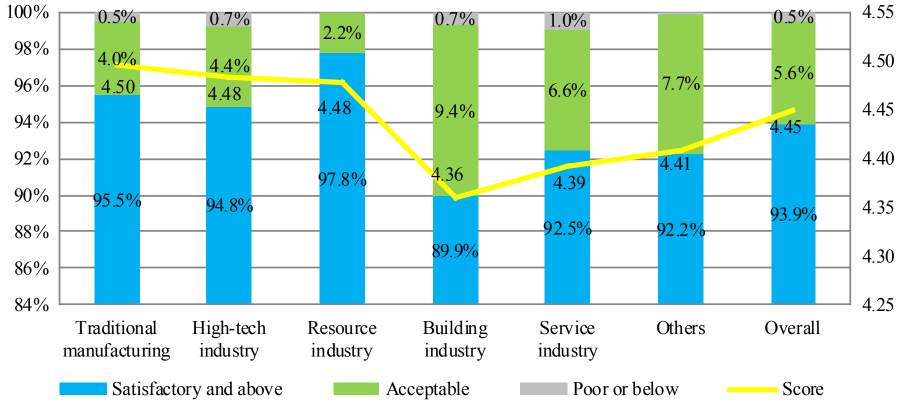

Chart 2-89 Proportion of satisfaction rate of fiscal and tax service environment in different industries

Seen from the sub-indicators of fiscal and tax service environment, the traditional manufacturing industry gives the highest evaluation to standardized fiscal and taxation law enforcement (4.42 points), the high-tech industry gives the highest to tax refund application handling time (4.41 points), and the building industry gives the lowest to both the sub-indicators (4.08 and 4.02 respectively). All industries give standardized fiscal and taxation law enforcement the highest evaluations.

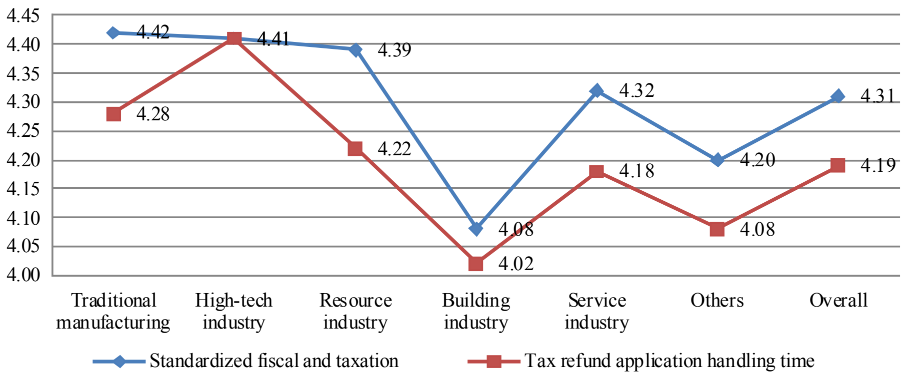

Chart 2-90 Evaluation of fiscal and tax service environment sub-indicators in different industries

Seen from the frequency of payment of taxes and fees, the building industry has the highest average frequency, reaching 20.91 times, and the resource industry has the lowest frequency, at only 12.81 times. Seen from the time spent on payment of taxes and fees, the high-tech industry consumes the longest average time of 32.73 hours, and the maximum value is 1,440 hours. The building industry consumes the least time, which is 11.57 hours.

从总费率看，高新技术产业最高，均值为 11.29%，高于最低建筑业（4.72%）6.57 个百分点。从总税率看，资源行业总税率最高（13.01%），其次是传统制造业（12.17%），建筑业最少（5.48%）。

表 2-13 不同行业企业税费缴纳情况表

	税费缴纳次数（次）		税费缴纳耗时（小时）		总费率（%）		总税率（%）	
	均值	极大值	均值	极大值	均值	极大值	均值	极大值
传统制造业	13.14	287	13.10	560.00	11.02	200.00	12.17	1095.00
高新技术产业	20.04	960	32.73	1440.00	11.29	100.00	10.70	155.44
资源行业	12.81	75	24.73	500.00	11.19	100.00	13.01	100.00
建筑业	20.91	400	11.57	148.00	4.72	50.00	5.48	60.00
服务业	16.25	300	18.60	432.00	8.59	159.45	9.41	165.00
其他	14.21	175	17.00	850.00	8.80	100.00	10.10	342.47
总体	15.23	960	18.14	1440.00	9.76	200.00	10.62	1095.00

（四）企业评价大幅提升，东部、服务行业和国有企业评价提升明显

动态看，2018 年财税服务环境评价为 4.24 分，2019 年为 4.40 分，提高 21%，增幅较大。从细分指标评价看，申退税办理时间评价由 2018 年的 4.07 分提高至 2019 年的 4.19 分，提升 0.12 分。

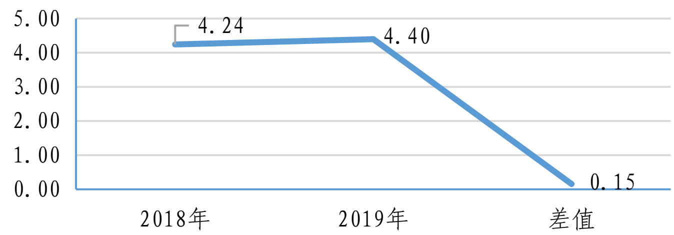

图2-91 财税服务环境细分指标年度评价对比图

1. 各地区评价均有提升，东部提升幅度最大。

与 2018 年相比，2019 年各地区评价均有不同程度提升。其中，东部和西部提升幅度较大，分别提高了 0.23 分、0.20 分；中部相对较小，提高 0.16 分。

From the perspective of total fee rate, the high-tech industry has the highest average value of 11.29%, 6.57 percentage points higher than the lowest value of the building industry (4.72%). In terms of total tax rate, the resource industry has the highest value (13.01%), followed by the traditional manufacturing industry (12.17%), and the building industry has the lowest (5.48%).

Table 2-13 Payment of taxes and fees in different industries

	Frequency of payment of taxes and fees(Times)		Time spent on payment of taxes and fees(Hours)		Total fee rate(%)		Total tax rate(%)	
	Average	Maximum	Average	Maximum	Average	Maximum	Average	Maximum
Traditional manufacturing	13.14	287	13.10	560.00	11.02	200.00	12.17	1095.00
High-tech industry	20.04	960	32.73	1440.00	11.29	100.00	10.70	155.44
Resource industry	12.81	75	24.73	500.00	11.19	100.00	13.01	100.00
Building industry	20.91	400	11.57	148.00	4.72	50.00	5.48	60.00
Service industry	16.25	300	18.60	432.00	8.59	159.45	9.41	165.00
Others	14.21	175	17.00	850.00	8.80	100.00	10.10	342.47
Overall	15.23	960	18.14	1440.00	9.76	200.00	10.62	1095.00

(4) The evaluation has greatly improved, and the evaluations by the eastern area, the service industry and state-owned enterprises show significant improvements.

Dynamically, the overall score of fiscal and tax service environment was 4.24 points in 2018, and has risen to 4.40 points in 2019, a large increase of 21%. Based on the evaluations of the sub-indicators, the evaluation of tax refund application handling time has increased from 4.07 points in 2018 to 4.19 points in 2019, up by 0.12 points.

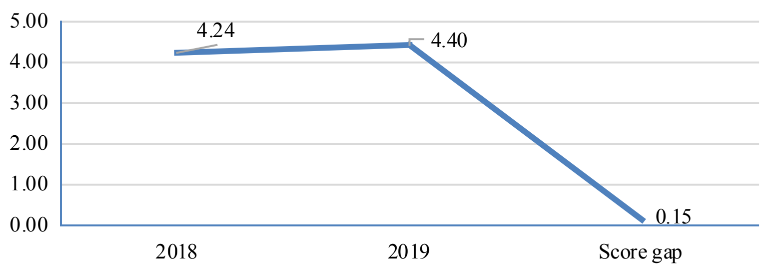

Chart 2-91 Comparison of annual evaluation of fiscal and tax service environment sub-indicators

1. Evaluations have improved in all areas, with the largest increase in the east.

Compared with 2018, evaluations in 2019 have improved to different degrees in all areas. Increases in the east and west are relatively large, by 0.23 points and 0.20 points respectively, and that in the central area is relatively small, by 0.16 points.

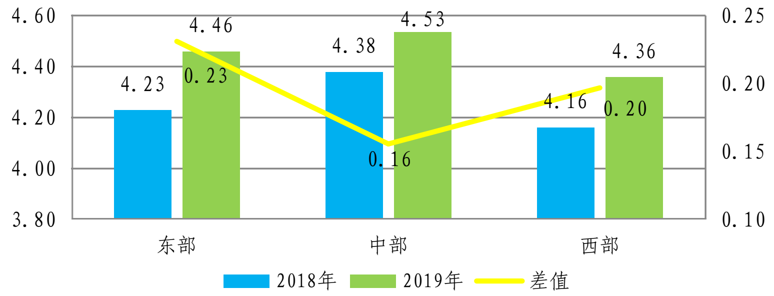

图2-92 财税服务环境不同地区年度评价对比图

2. 各行业均有提升，服务行业评价提升幅度最大。

从行业角度看，各行业评价均有较大提升。其中，服务行业提升幅度最大，由2018年的4.08分提高至2019年的4.39分，增加0.31分，增幅高达7.60%；资源行业次之，提高0.29分；其他行业较小，提高0.14分。

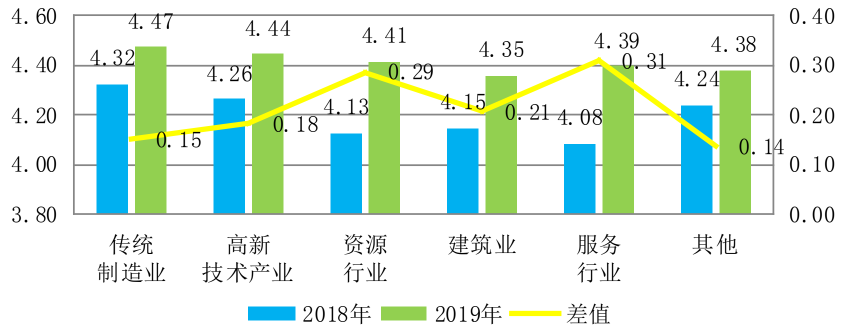

图2-93 财税服务环境不同行业年度评价对比

3. 各类企业评价普遍提升，国有企业提升明显。

从所有制角度看，各类企业评价普遍提升。其中，国有企业评分提升幅度最大，由2018年的4.14分提至2019年的4.38分，提高了0.24分；其余行业也均提高0.10分以上。

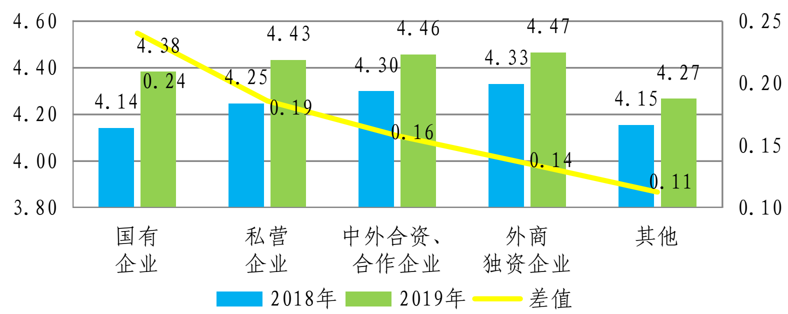

图2-94 财税服务环境不同所有制企业年度评价对比图

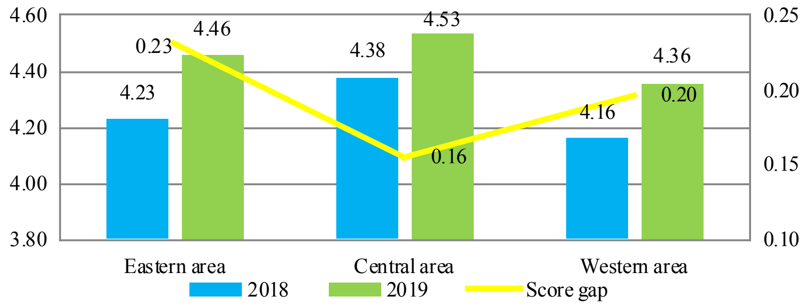

Chart 2-92 Comparison of annual evaluation of fiscal and tax service environment in different areas

2. All industries give higher evaluations, and the service industry sees the largest increase in evaluation result.

From an industry perspective, evaluations by various industries have all greatly improved. The service industry sees the biggest increase, from 4.08 points in 2018 to 4.39 points in 2019, an increase of 0.31 points, up by 7.60%. The resource industry ranks second with an increase of 0.29 points. Other industries have a smaller increase, by 0.14 points.

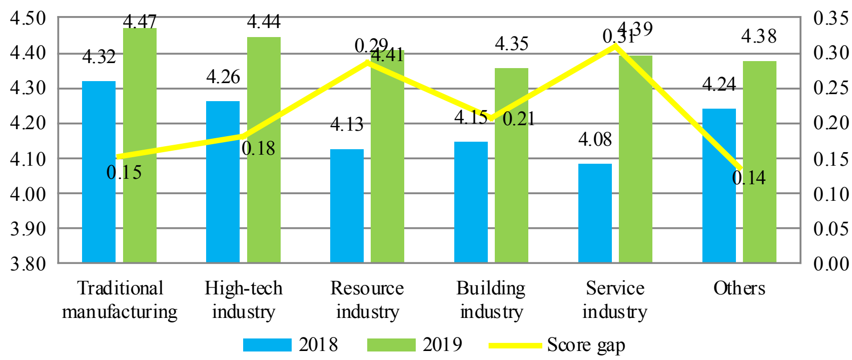

Chart 2-93 Comparison of annual evaluation of fiscal and tax service environment in different industries

3. Evaluations have generally improved in different types of enterprises, and state-owned enterprises see an obvious increase.

In enterprises of different natures, evaluations have generally improved. State-owned enterprises see the biggest increase, from 4.14 points in 2018 to 4.38 points in 2019, an increase of 0.24 points. All the rest industries see increases by more than 0.10 points.

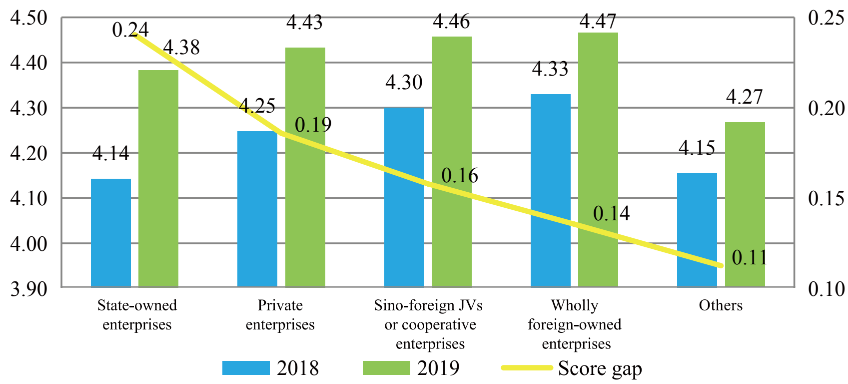

Chart 2-94 Comparison of annual evaluation of fiscal and tax service environment in enterprises of different natures

十一、口岸服务环境评价居一级指标之首

口岸服务环境细分为货物通关、检验检疫和人员出入境三个二级指标。2019 年受访企业对口岸环境总体评价最高，居十二个一级指标之首。

（一）人员出入境满意度最高，进口耗时大于出口、出口费用大于进口

口岸服务环境总体评价高达 4.480 分，在 12 个一级指标中居首位，总体接近“非常满意”水平。各细分指标评价均在 4.49 分及以上，其中，货物通关和人员出入境评价最高（均为 4.50 分），达到“非常满意”水平；检验检疫略低（4.49 分）。

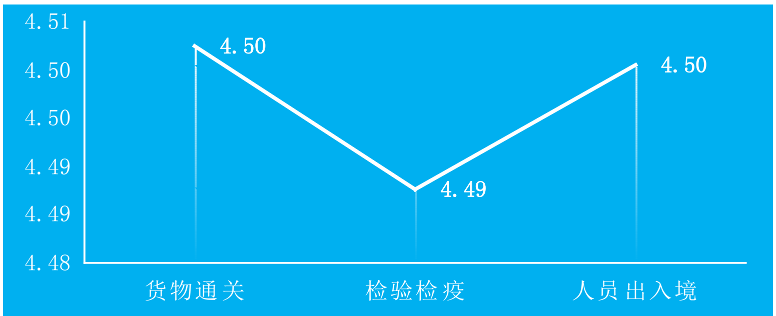

图2-95 口岸服务环境细分指标评价图

从企业满意度看，较满意及以上企业占比超九成（92.50%）。从细分指标看，较满意及以上企业占比均超九成。其中，人员出入境满意度最高，较满意及以上企业占比高达 93%，检验检疫企业占比相对略低，但也达到 90.30%。

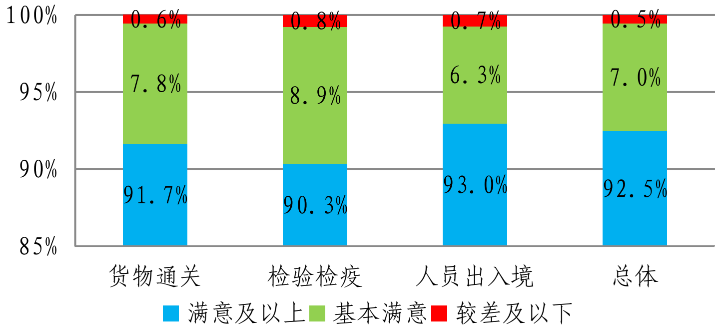

图2-96 口岸服务环境细分指标满意度占比图

整体看，出口时间整体低于进口所需时间。其中，单证审查出口耗时（5.11 小时）低于进口（5.98 小时），且在边境审查中，出口（5.22 小时）耗时低于进口（5.61 小时）。

XI. Evaluation result of port service environment ranks first among first-level indicators

Port service environment sub-indicators include the three secondary indicators of customs clearance of goods, inspection and quarantine, and entry and exit of personnel. In 2019, the score of port environment ranks first among the 12 first-level indicators.

(1) Entry and exit of personnel has the highest satisfaction rate, and the time for import is longer than that for export and the fees for export are more than those for import.

The overall score of port service environment is as high as 4.480 points, ranking first among the 12 first-level indicators, close to "very satisfactory". The sub-indicator evaluations are all at or above 4.49 points. Customs clearance of goods and entry and exit of personnel get the highest scores (both at 4.50 points), meaning "very satisfactory". Inspection and quarantine gets a slightly lower score (4.49 points).

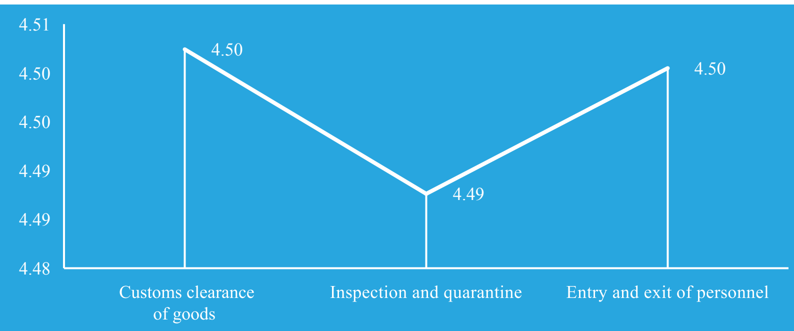

Chart 2-95 Evaluation of port service environment sub-indicators

In terms of satisfaction rate, it is over 90% (92.50%). For the sub-indicators, the satisfaction rates all exceed 90%. Entry and exit of personnel enjoys the highest satisfaction rate of 93%, while inspection and quarantine has a relatively low satisfaction rate, which reaches 90.30% nonetheless.

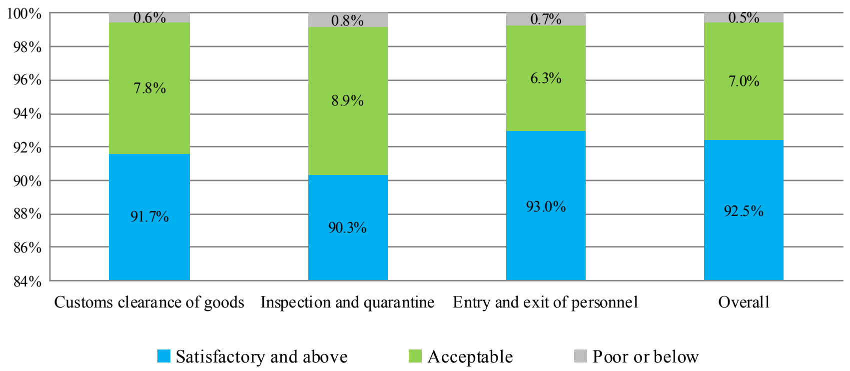

Chart 2-96 Proportion of satisfaction rate of port service environment sub-indicators

Overall, the time for export is less than the time required for import. Document review time for export (5.11 hours) is less than that for import (5.98 hours). In border review, the time for export (5.22 hours) is less than that for import (5.61 hours). In terms of fees, both border review fees and document review fees for import are

从费用看，进口的边境审查费用和单证审查费用均大幅低于出口。

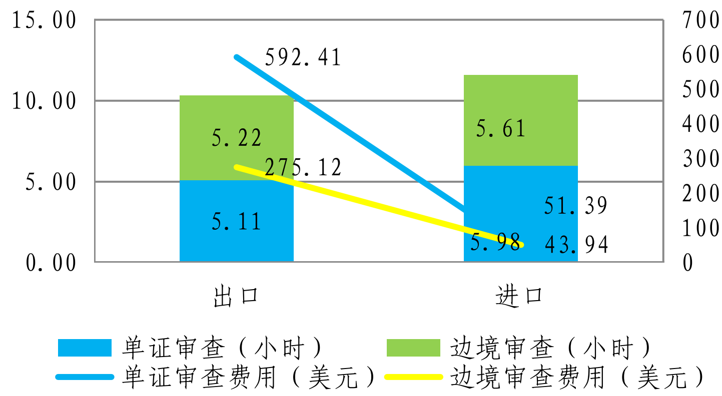

图2-97 进出口时间与费用

（二）东、中部企业评价达到“非常满意”水平，人员出入境获较高认可

从不同地区角度看，各地区企业评价普遍较高。其中，东部（4.54分）和中部（4.55分）企业评价均超4.50分，达到“非常满意”水平；西部略低（4.39分）。

从企业满意度看，各地区较满意及以上企业占比均在九成左右。其中，中部企业满意度最高，较满意及以上企业占94.50%，东部次之（93.20%），西部略低（89.70%）。

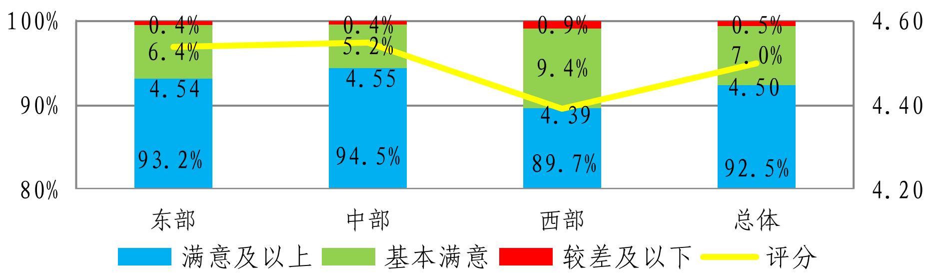

图2-98 各地区对口岸服务环境综合评价图

从口岸服务环境细分指标看，各地区评价均较高。其中，中部企业对货物通关（4.55分）和人员出入境（4.57分）评价均为最高，评价均在4.50分以上，达到“非常满意”水平；东部企业对检验检疫评价最高（4.55分），属于“非常满意”水平；西部企业对各项细分指标评价均为最低，其中，对检验检疫评价最低（4.35分）。各地区对人员出入境评价均超4.50分，达到“非常满意”水平。

表2-15 各地区对口岸服务环境细分指标的评价

排序	货物通关		检验检疫		人员出入境		口岸服务环境
	地区	得分	地区	得分	地区	得分	
1	中部	4.55	东部	4.55	中部	4.57	中部
2	东部	4.50	中部	4.52	东部	4.54	东部
3	西部	4.44	西部	4.35	西部	4.53	西部

significantly lower than those for export.

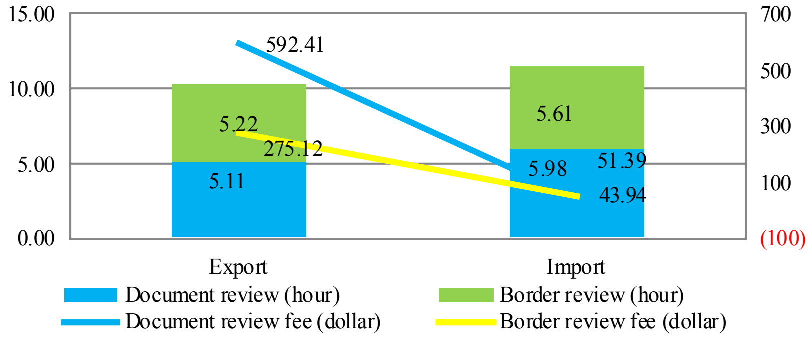

Chart 2-97 Time and fees for import and export

(2) Evaluations in the eastern and central areas reach the level of "very satisfactory", and entry and exit of personnel is highly recognized.

From a regional perspective, evaluations are generally high. Both the eastern area (4.54 points) and the central area (4.55 points) exceed 4.50 points, reaching a "very satisfactory" level. The west gives a slightly lower evaluation (4.39 points).

In terms of satisfaction rate, it is around 90% in all areas. The central area is the most satisfied, with a satisfaction rate of 94.50%, followed by the east (93.20%), and the west has a slightly lower satisfaction rate (89.70%).

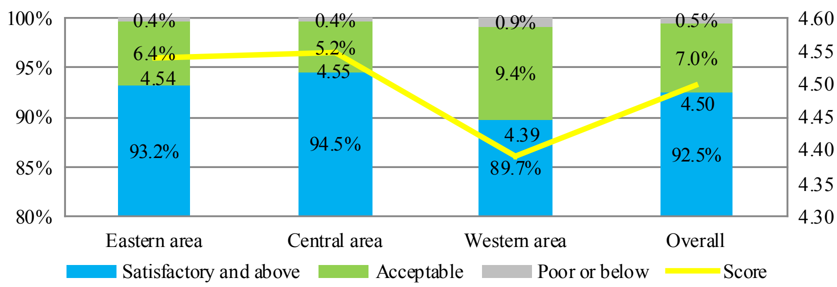

Chart 2-98 Comprehensive evaluation of port service environment in different areas

For the sub-indicators of port service environment, evaluations in all areas are high. The central area gives the highest evaluations to goods clearance (4.55 points) and personnel entry and exit (4.57 points), both of which are above 4.50 points, meaning "very satisfactory". The east gives the highest evaluation to inspection and quarantine (4.55 points), meaning "very satisfactory". The west gives the lowest scores to all the sub-indicators, with inspection and quarantine getting the lowest (4.35 points). Personnel entry and exit gets a score above 4.50 points in all areas, reaching a "very satisfactory" level.

Table 2-15 Evaluation of port service environment sub-indicators in different areas

Ranking	Customs clearance of goods		Inspection and quarantine		Entry and exit of personnel		Port service environment
	Area	Score	Area	Score	Area	Score	
1	Central area	4.55	Eastern area	4.55	Central area	4.57	Central area
2	Eastern area	4.50	Central area	4.52	Eastern area	4.54	Eastern area
3	Western area	4.44	Western area	4.35	Western area	4.53	Western area

1. 东部企业进出口单证和边境审查查耗时较少。

从各地区出口单证和边境审查时间看，西部企业出口耗时明显较长，单证审查和边境审查时间的均值分别为 6.64 小时、7.26 小时，极大值分别为 312 小时、300 小时；东部耗时最短，单证和边境审查时间分别为 3.80 小时、4.22 小时，极大值均为 72 小时。

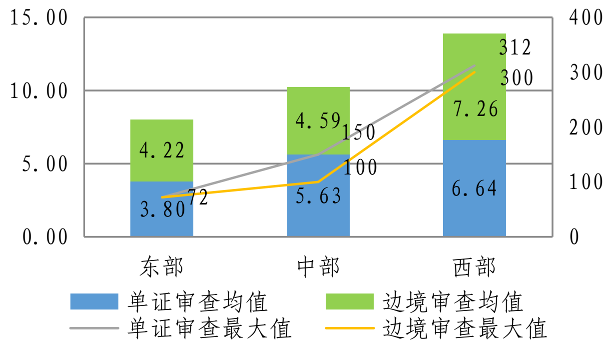

图2-99 各地区出口单证、边境审查时间（单位：小时）

从各地区进口单证和边境审查时间看，西部企业进口耗时最长，单证审查和边境审查所需时间分别为 7.35 小时、6.38 小时，极大值均为 180 小时；东部耗时最短，单证审查和边境审查所需时间分别为 4.73 小时、5.15 小时，极大值均为 72 小时。

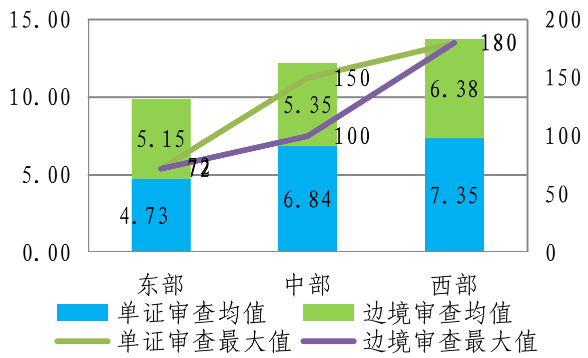

图2-100 各地区进口单证、边境审查时间（单位：时间）

2. 中部企业进出口单证和边境审查耗费最少。

从各地区出口耗费看，东部企业出口单证审查平均费用最多（52.60 美元），极大值为东部（5000 美元）；进口边境审查所需费用最多为西部企业（78.87 美元），极大值为东部 4166 美元；中部企业耗费均为最少，分别为 37.90 美元、32.97 美元。

1. The import and export document and border review for enterprises in the eastern area is less time-consuming.

Seen from the export document and border review time in all areas, western area enterprises spend an obviously longer time to export, with the average document and border review time at 6.64 hours and 7.26 hours, respectively, and the maximum values are 312 hours and 300 hours, respectively. Eastern area enterprises spend the shortest time, with the document and border review time at 3.80 hours and 4.22 hours, respectively, and the maximum values are both 72 hours.

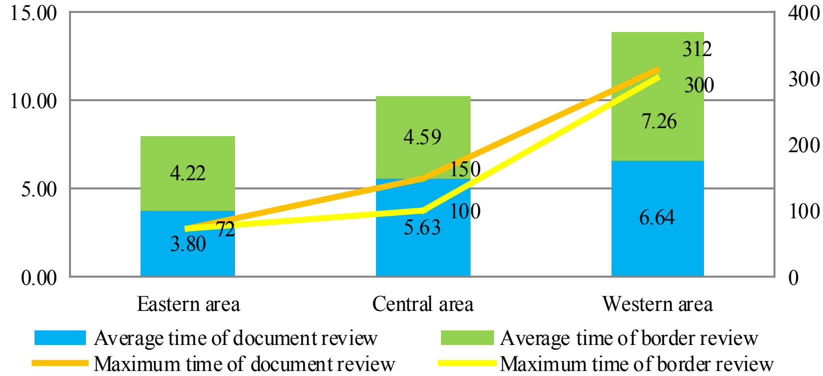

Chart 2-99 Export document/border review time in different areas (unit: hour)

Seen from the import document and border review time in all areas, western area enterprises spend the longest time to import, with the time required for document and border review at 7.35 hours and 6.38 hours, respectively, and the maximum values are both 180 hours. Eastern area enterprises spend the shortest time, with the time required for document and border review at 4.73 hours and 5.15 hours, respectively, and the maximum values are both 72 hours.

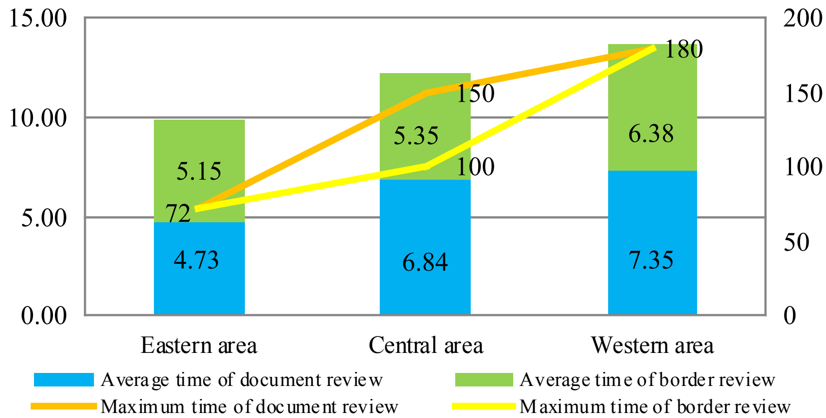

Chart 2-100 Import document/border review time in different areas (unit: hour)

2. The import and export document and border review for enterprises in the central area is the cheapest.

Seen from the fees for export in all areas, the average fees of export document review for eastern area enterprises are the highest (52.60 US dollars), and the maximum value is in the east, at 5,000 US dollars. The fees of export border review for western area enterprises are the highest (78.87 US dollars), and the maximum value is in the east, at 4,166 US dollars. Central area enterprises spend the least fees, at 37.90 and 32.97 US dollars, respectively.

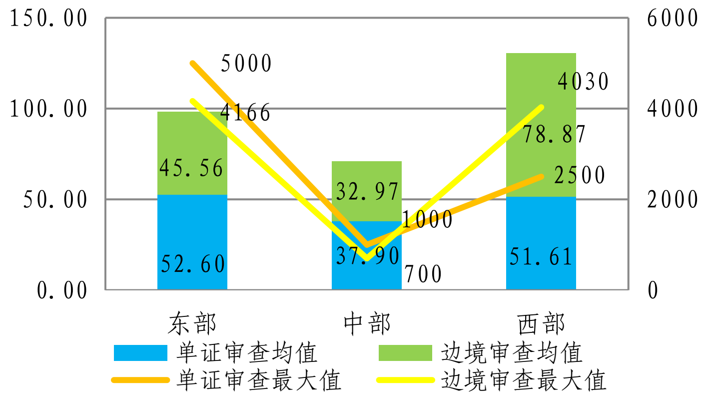

图2-101 各地区出口单证、边境审查费用

从各地区进口耗费看，东部企业进口单证和边境审查平均费用均为最高，分别为60.82美元、68.39美元；中部企业耗费最少，分别为16.35美元、17.69美元。

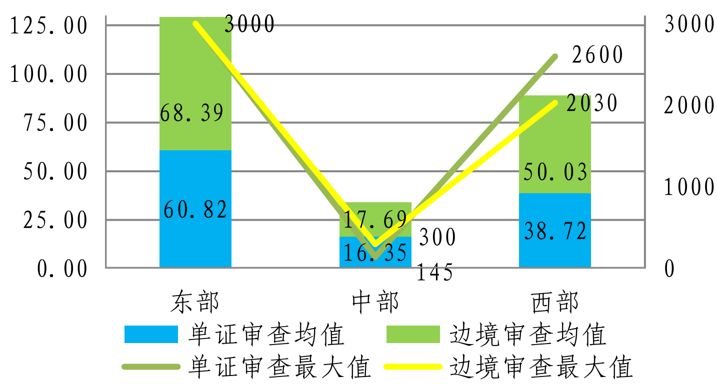

图2-102 各地区进口单证、边境审查费用

（三）大部分行业评价达到“非常满意”水平，高新技术产业进出口审查耗时长、费用高

从行业角度看，大部分行业企业评价均达到“非常满意”水平。其中，资源行业最高（4.61分），传统制造业次之（4.57分），建筑业和高新技术产业评价居中（分别为4.52分、4.50分）；其他行业和服务行业评价略低（分别为4.44分、4.39分）。

从企业满意度看，大部分行业较满意及以上占比均超九成。其中，资源行业满意度最高，较满意及以上企业占比高达95.80%；建筑业和服务行业满意度略低（分别为89.70%、88%），企业占比均低于九成；其余行业较满意及以上企业占比均高于九成。

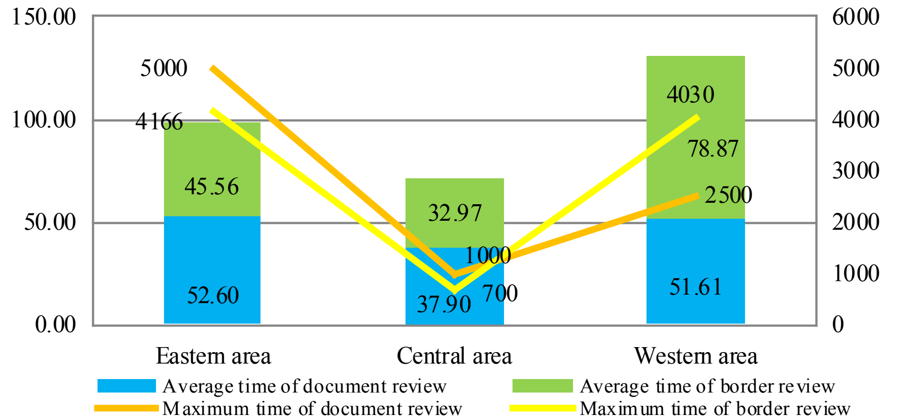

Chart 2-101 Export document/border review fees in different areas

Seen from the fees for import in all areas, the average fees of import document and border review for eastern area enterprises are the highest, at 60.82 and 68.39 US dollars, respectively. Central area enterprises spend the least, at 16.35 and 17.69 US dollars, respectively.

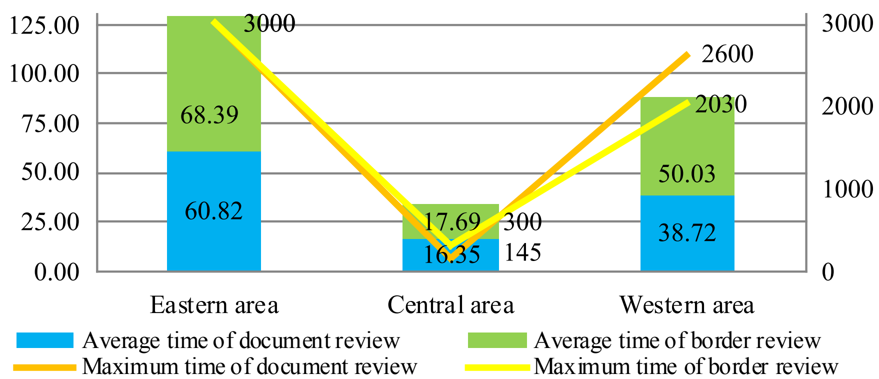

Chart 2-102 Import document/border review fees in different areas

(3) Most industry evaluations have reached the level of "very satisfactory", and the import and export review for the high-tech industry is time-consuming and costly.

From an industry perspective, most industry evaluations have reached the level of "very satisfactory". The resource industry gives the highest score (4.61 points), followed by the traditional manufacturing industry (4.57 points). The building industry and high-tech industry are in the middle (4.52 and 4.50 points respectively). Other industries and service industry give slightly lower scores (4.44 and 4.39 respectively).

From the perspective of satisfaction rate, it is above 90% in most industries. The resource industry has the highest satisfaction rate of 95.80%. The building industry and service industry have slightly lower satisfaction rates (89.70% and 88% respectively), both of which are under 90%. Satisfaction rates in the rest industries are all above 90%.

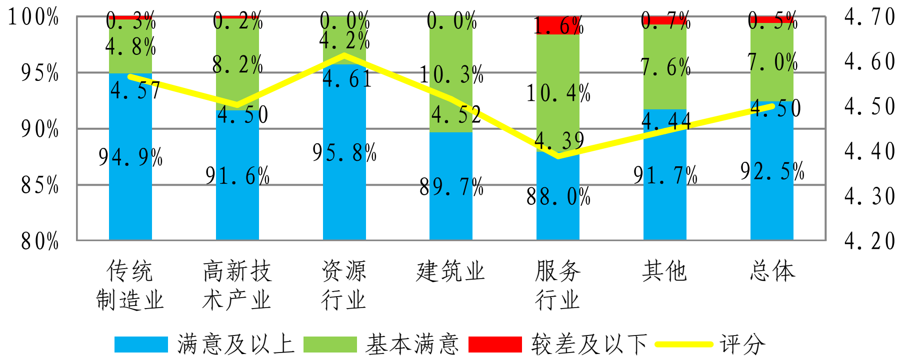

图2-103 不同行业对口岸服务环境的满意度占比图

从口岸服务环境细分指标看，各行业对细分指标评价差异较小（差值在0.02分-0.09分）。其中，资源行业和传统制造业对各项细分指标的评价均达到“非常满意”水平，资源行业对每项指标评价均超4.60分；服务行业对各项细分指标评价均为最低，其中，对检验检疫评分最低（4.37分）。

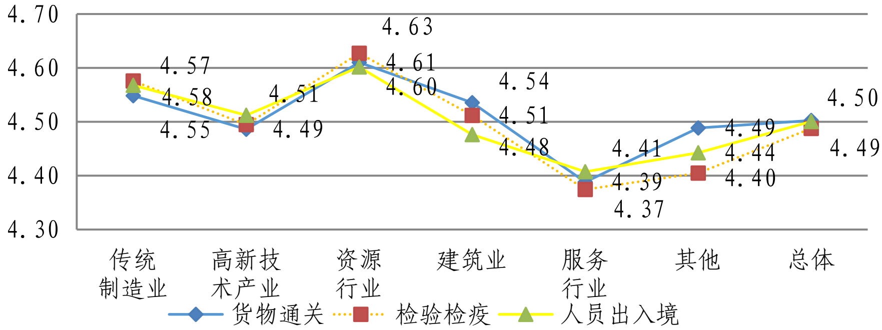

图2-104 不同行业对口岸服务环境细分指标评价图

1. 高新技术产业进出口审查所需时间较长。

高新技术产业出口单证审查和进出口边境审查所需时间较长。其中，出口单证审查时间为9.97小时，超过耗时最少的资源行业（2.62小时）7.35小时；出口边境审查时间9.32小时，高于耗时最少的资源行业（2.36小时）6.96小时；进口边境审查时间8.84小时，高于耗时最少的资源行业（2.50小时）6.34小时。建筑业进口单证审查时间12.80小时，超过耗时最少的资源行业（2.70小时）10.10小时。除高新技术产业外，大部分行业进口所需时间高于出口所需时间。

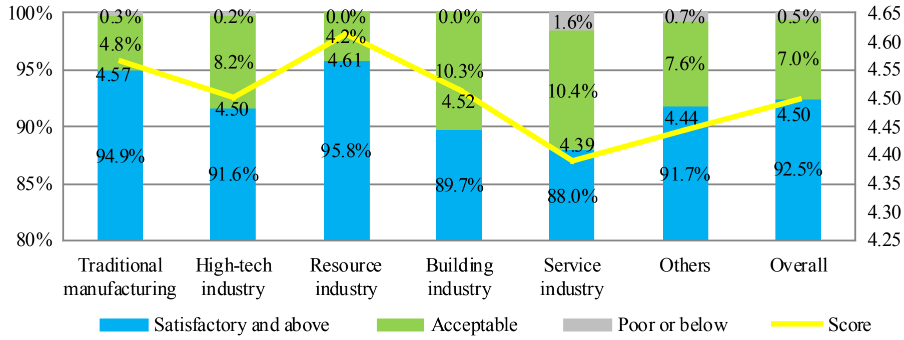

Chart 2-103 Proportion of satisfaction rate of port service environment in different industries

For the sub-indicators of port service environment, industry evaluations are not that different (differences are between 0.02 and 0.09). The resource industry and traditional manufacturing industry give all the sub-indicators scores meaning "very satisfactory". The resource industry rates every sub-indicator as above 4.60 points, and the service industry gives the lowest scores to all the sub-indicators, with inspection and quarantine getting the lowest (4.37 points).

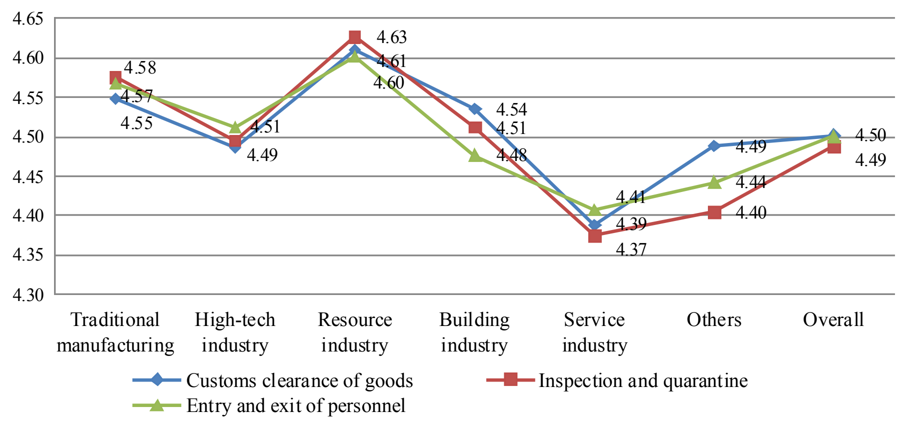

Chart 2-104 Evaluation of port service environment sub-indicators in different industries

1. The time required for import and export review in the high-tech industry is long.

It takes a long time for import and export document and border review in the high-tech industry. The export document review time is 9.97 hours, 7.35 hours longer than the least time-consuming resource industry (2.62 hours). The export border review time is 9.32 hours, 6.96 hours longer than the least time-consuming resource industry (2.36 hours). The import border review time is 8.84 hours, 6.34 hours longer than the least time-consuming resource industry (2.50 hours). The import document review time in the building industry is 12.80 hours, 10.10 hours longer than the least time-consuming resource industry (2.70 hours). Except the high-tech industry, most industries require more time to import than to export.

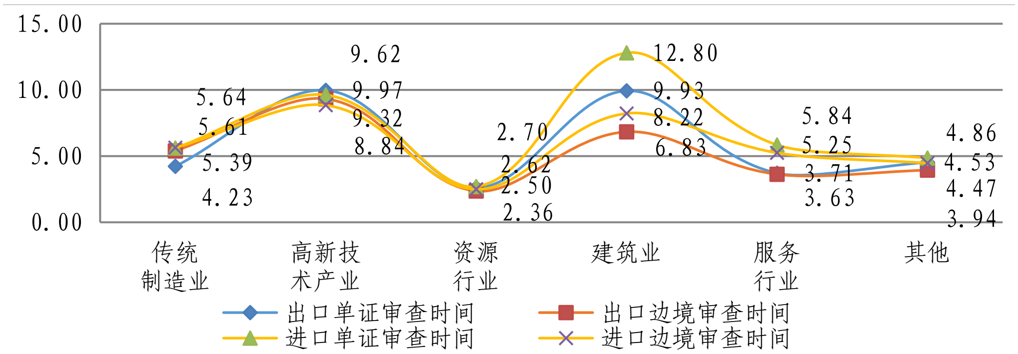

图2-105 不同行业进出口所需平均时间

2. 高新技术产业进出口平均所需费用较高。

从行业角度看，高新技术产业进出口所需费用均为最高。其中，出口单证审查费用为 130.66 美元，高于费用最低的资源行业（4.33 美元）126.33 美元；出口边境审查费用为 117.76 美元，超过费用最低的资源行业（4.64 美元）113.12 美元；进口单证审查费用 151.64 美元，高于费用最低的资源行业（4.54 美元）147.10 美元；进口边境审查费用为 138.72 美元，超过费用最低的资源行业（5.00 美元）133.72 美元。整体看，高新技术产业费用最高，传统制造业次之，资源行业费用较低。

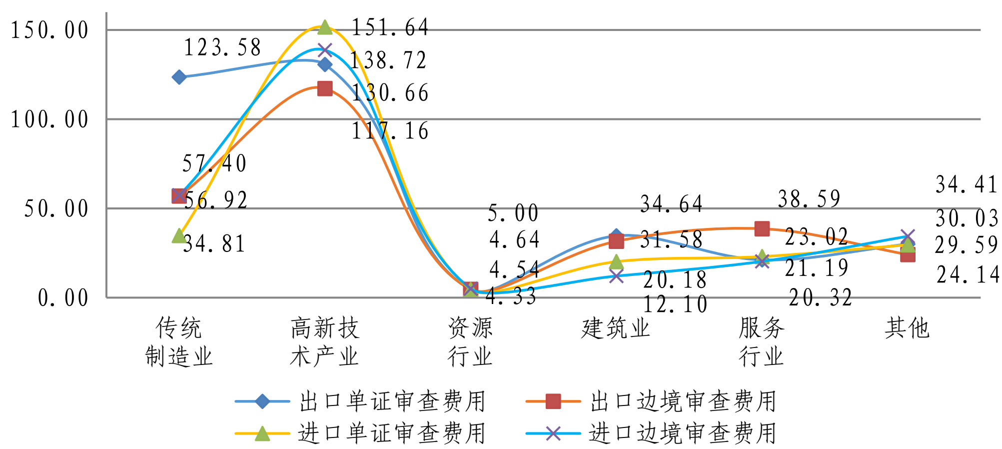

图2-106 不同行业进出口平均费用

（四）企业评价有所提升，人员出入境、中部和资源行业评价提升明显

从企业评价均值看，2018 年受访企业对口岸服务环境总体评价为 4.35 分，2019 年为 4.48 分，提高了 0.13 分。

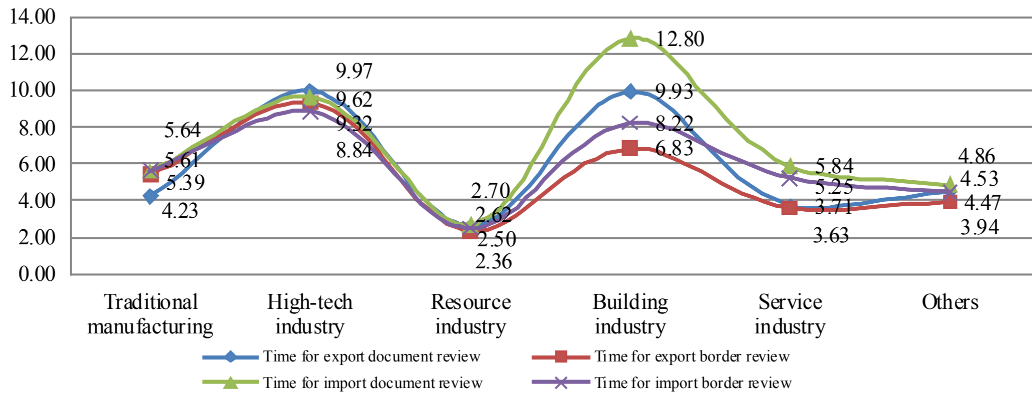

Chart 2-105 Average time required for import and export in different industries

2. The average fees for import and export in the high-tech industry are relatively high.

From an industry perspective, both the fees for import and for export in the high-tech industry are the highest. The export document review fees are 130.66 US dollars, 126.33 US dollars higher than the least money-consuming resource industry (4.33 US dollars). The export border review fees are 117.76 US dollars, 113.12 US dollars higher than the least money-consuming resource industry (4.64 US dollars). The import document review fees are 151.64 US dollars, 147.10 US dollars higher than the least money-consuming resource industry (4.54 US dollars). The import border review fees are 138.72 US dollars, 133.72 US dollars higher than the least money-consuming resource industry (5.00 US dollars). Overall, the high-tech industry has the highest fees, followed by the traditional manufacturing industry, and the resource industry has low fees.

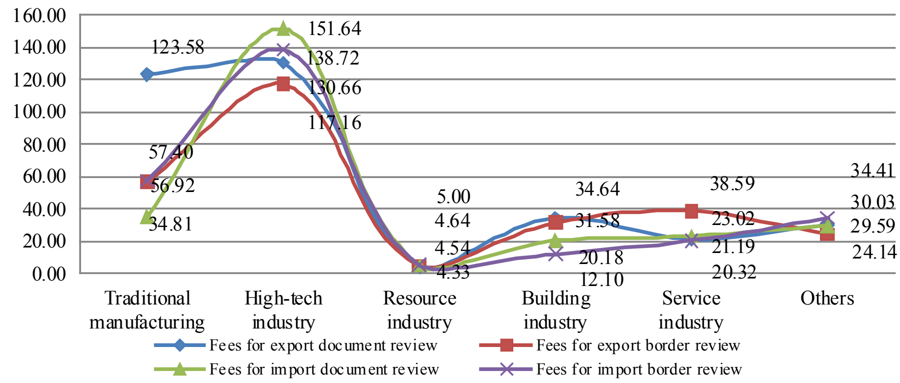

Chart 2-106 Average fees required for import and export in different industries

(4) Evaluations have improved, and the evaluations of personnel entry and exit, in the central area and in the resource industry see significant improvements.

Based on the average value of evaluations, the overall score of port service environment in 2018 was 4.35 points, and has risen to 4.48 points in 2019, an increase of 0.13 points.

1. 各项指标均有提升，人员出入境提升幅度最大。

2018 年人员出入境评价为 4.32 分，检验检疫为 4.34 分，货物通关为 4.35 分。2019 年人员出入境为 4.50 分，检验检疫为 4.49 分，货物通关为 4.50 分。人员出入境提升最明显，提高了 0.18 分；其他两项细分指标均提高 0.15 分。

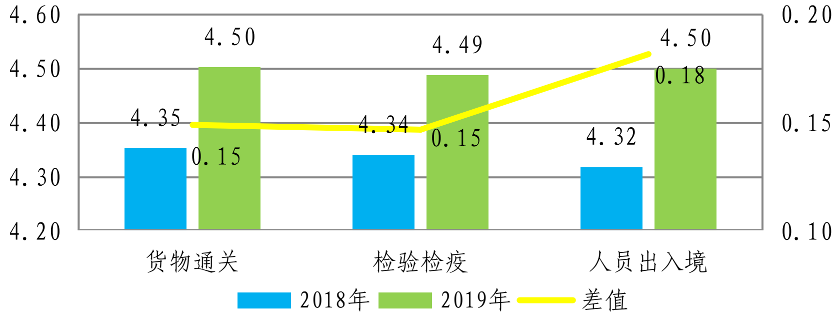

图2-107 口岸服务环境细分指标年度评价对比图

2. 各地区企业评价均有一定程度提高，西部提高明显。

从地区角度看，与 2018 年相比，2019 年各地区企业评价均有不同程度上升。其中，西部提升幅度最大，由 2018 年的 4.32 分提至 2019 年的 4.50 分，达到“非常满意”水平，提高了 0.19 分；东部次之，提高了 0.15 分；中部最不明显，仅提高 0.03 分。

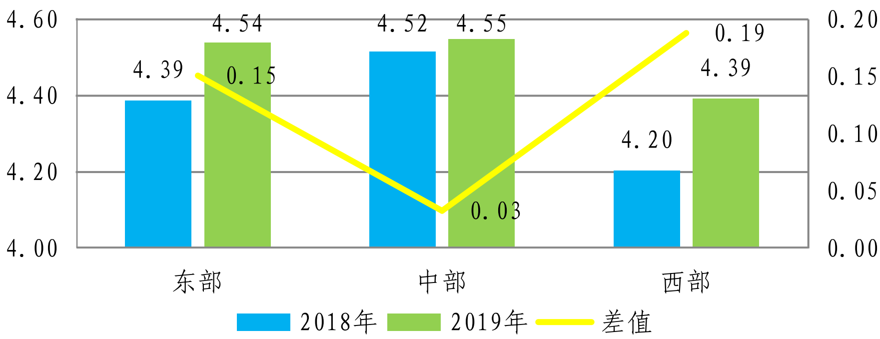

图2-108 口岸服务环境不同地市年度评价对比图

3. 各行业企业评价提升幅度相差较大，资源行业提升幅度最大。

从行业角度看，与 2018 年相比，2019 年各行业企业评价提升幅度差异较大。其中，资源行业提升幅度最大，由 2018 年 4.18 分提至 2019 年的 4.60 分，达到“非常满意”水平，提高了 0.42 分；高新技术产业提升幅度最小，由 2018 年的 4.38 分提至 2019 年的 4.45 分，仅提高 0.07 分。

1. All the sub-indicators get higher evaluations, and personnel entry and exit sees the largest increase.

In 2018, personnel entry and exit was 4.32 points, inspection and quarantine was 4.34 points, and customs clearance of goods was 4.35 points. In 2019, the scores become 4.50, 4.49 and 4.50 respectively. The increase in personnel entry and exit is the most obvious, with an increase of 0.18 points. The other two sub-indicators increased by 0.15 points.

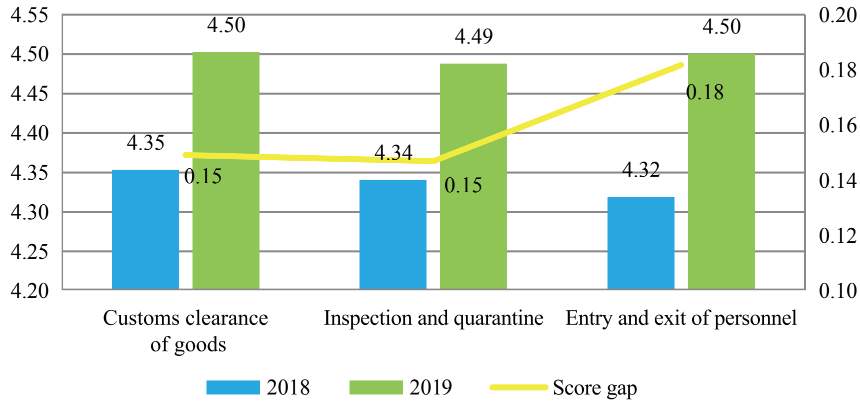

Chart 2-107 Comparison of annual evaluation of port service environment sub-indicators

2. Evaluations have improved to different degrees in all areas, and the western area contributes a significant increase in the evaluation result.

From a regional perspective, compared with 2018, evaluations in 2019 have all improved to different degrees in all areas. The western area has the largest increase, from 4.32 points in 2018 to 4.50 points in 2019, reaching a "very satisfactory" level, up by 0.19 points, followed by the east, up by 0.15 points. The increase in the central area is the least obvious, only by 0.03 points.

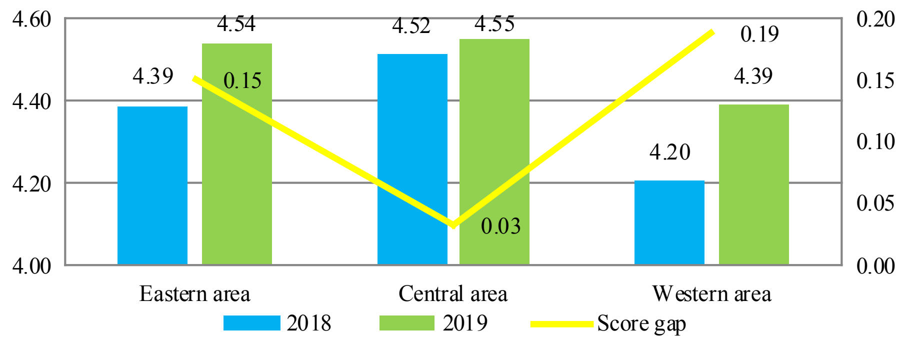

Chart 2-108 Comparison of annual evaluation of port service environment in different areas

3. Increases in industry evaluations are quite different, and the resource industry has the largest increase.

From an industry perspective, compared with 2018, increases in industry evaluations are quite different in 2019. The resource industry has the largest increase, from 4.18 points in 2018 to 4.60 points in 2019, reaching a "very satisfactory" level, up by 0.42 points. The high-tech industry has the smallest increase, from 4.38 points in 2018 to 4.45 points in 2019, only up by 0.07 points.

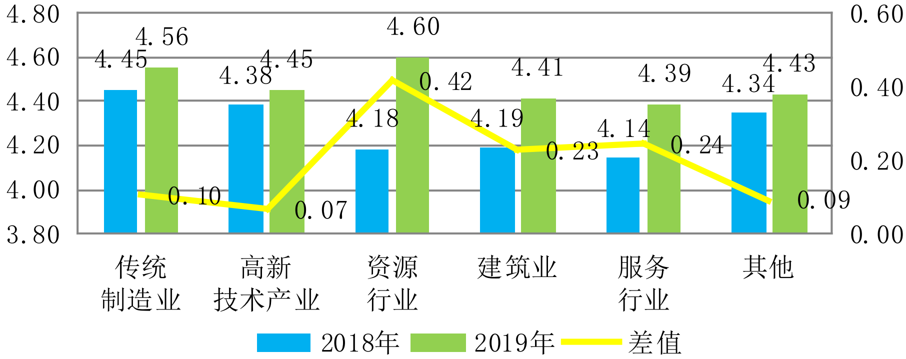

图2-109 口岸服务环境不同行业年度评价对比图

十二、企业开办效率获较大提升

企业设立和退出环境细分为土地获取、环保手续和破产手续办理三个二级指标。2019 年受访企业对企业设立与退出环境总体评价较低，在十二项一级指标中排名第九。

（一）较满意及以上占比接近八成，破产手续办理满意度较低

企业设立和退出环境评价为 4.27 分，低于营商环境总体评价均值，位居第九。从细分指标看，各项指标评价差异较小（差值 0.04 分）。其中，土地获取评价最高（4.21 分），环保手续居中（4.22 分），破产手续办理最低（4.17 分）。

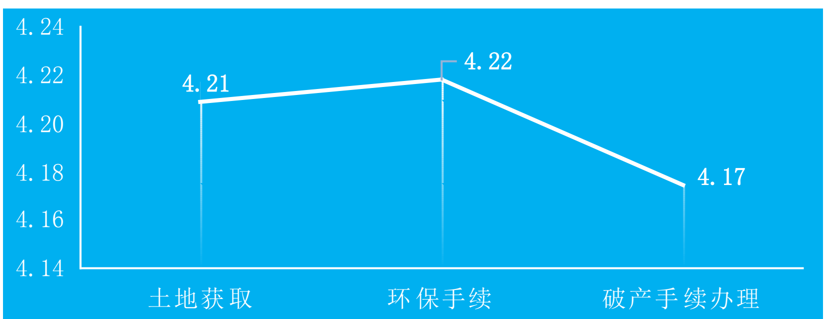

图2-110 企业设立和退出细分指标评价图

从企业满意度看，企业设立和退出环境较满意及以上企业占比为 81.40%，远低于营商环境总体满意度（90.5%）；16.7% 的受访企业认为一般，较差及以下占 1.80%。从细分指标看，各项指标较满意及以上企业占比均在八成左右，其中，土地获取满意度最高，较满意及以上企业占比为 81.20%；破产手续办理满意度最低，较满意及以上企业占比不足八成，仅为 76.30%，认为一般企业占比超两成，达到 20.60%。

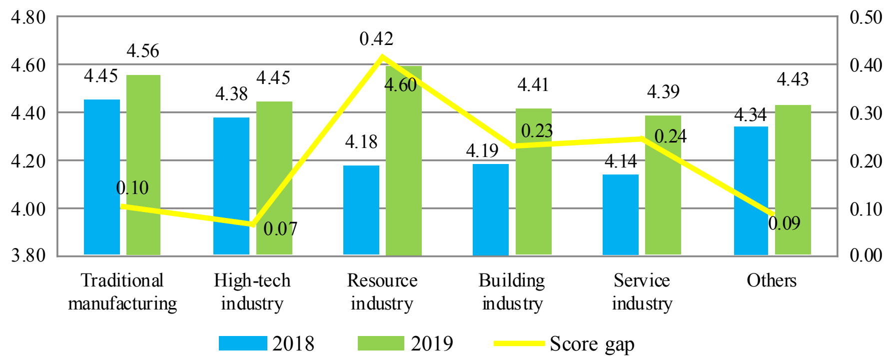

Chart 2-109 Comparison of annual evaluation of port service environment in different industries

XII. Efficiency of business establishment is greatly improved

Business establishment and exit environment sub-indicators include the three secondary indicators of access to land, environmental formalities and bankruptcy formalities. In 2019, the overall score of business establishment and exit environment is low, ranking ninth among the 12 first-level indicators.

(1) Nearly 80% of enterprises consider it satisfactory and above, and bankruptcy formalities handling has a low satisfaction rate.

Business establishment and exit environment gets an overall score of 4.274 points, lower than the overall score of the business environment in China, ranking ninth in the 12 first-level indicators. Regarding the sub-indicators, evaluations are not much different (the difference is 0.04 points). Access to land gets the highest (4.21 points), followed by environmental formalities (4.22 points), and bankruptcy formalities gets the lowest (4.17 points).

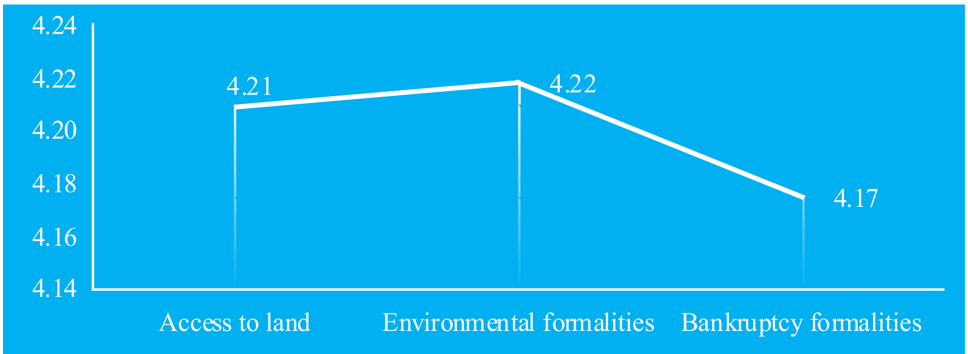

Chart 2-110 Evaluation of business establishment and exit sub-indicators

From the perspective of satisfaction rate, it is 81.40%, far lower than the overall satisfaction rate of the business environment in China (90.5%). 16.7% of the surveyed enterprises give a "fair" evaluation and 1.80% give a "poor or below" evaluation. In terms of the sub-indicators, the satisfaction rates are all around 80%. Access to land has the highest satisfaction rate of 81.20%, and bankruptcy formalities has the lowest, which is less than 80% and at only 76.30%, and over 20% (reaching 20.60%) of enterprises give it a "fair" evaluation.

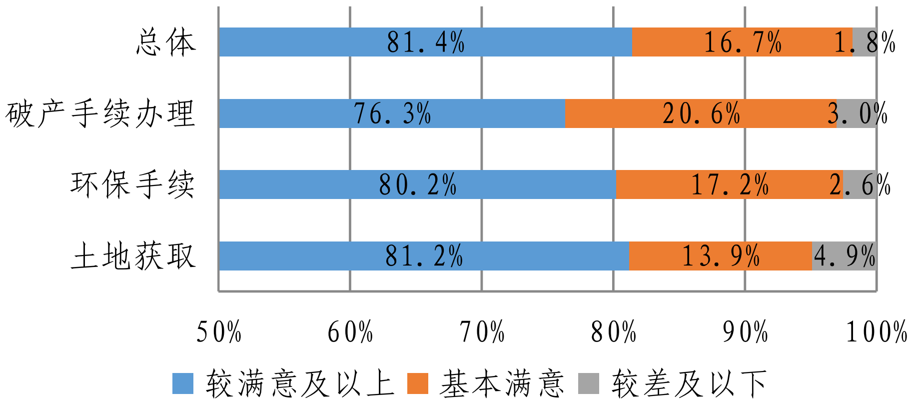

图2-111 企业设立与退出细分指标满意度占比图

企业问卷调查显示，开办企业程序、时间和费率均值分别为4.81项、6.50个工作日和7.23%；施工许可办理流程、办理时限和办理费率分别为5.11项、7.97工作日和6.04%；产权登记程序、时限和费率分别为4.76项、6.30工作日和4.31%；获得信贷办理环节、申请材料和办理时限分别为4.09个、4.97项和7.91工作日；获得电力办理环节、申请材料和办理时限分别为4.39个、4.31项和7.17工作日；用水用气报装办理环节、申请材料和办理时限分别为4.37个、4.62项和6.01工作日；企业注销材料、费用、程序和时限分别为4.75项、149.23元、3.87个和7.11工作日；在破产清算方面，诉讼费用率均值为4.31%，清算回收率为6.79%。

表 2-16 企业设立与退出环境细分指标总体情况

项目		均值	项目		均值
开办企业	程序（项）	4.81	产权登记	程序（项）	4.76
	时间（工作日）	6.50		时限（工作日）	6.30
	费率（占人均收入%）	7.23		费率（占财产价值%）	4.31
施工许可	办理流程（项）	5.11	获得信贷	办理环节（个）	4.09
	办理时限（工作日）	7.97		申请材料（项）	4.97
	办理费率（%）	6.04		办理时限（工作日）	7.91
获得电力	办理环节（个）	3.59	企业注销	材料（项）	4.75
	申请材料（项）	4.31		费用（元）	149.23
	办理时限（工作日）	7.17		程序（个）	3.87
用水用气报装	办理环节（个）	4.37		时限（工作日）	7.11
	申请材料（项）	4.62	破产诉讼费用率（%）		4.31
	办理时限（工作日）	6.01	清算回收率（%）		6.79

（二）各地区评价存在差异，中部评价较高

从不同地区角度看，东、中、西部对企业设立和退出环境评价，中部最高（4.31分）、东部次之（4.20分），西部较低（4.14分）。

Chart 2-111 Proportion of satisfaction rate of business establishment and exit sub-indicators

According to questionnaire surveys among enterprises, the average procedures, time and fees for starting a business are respectively 4.81 items, 6.50 working days and 7.23%. Construction permits handling procedures, time and fees are respectively 5.11 items, 7.97 working days and 6.04%. Property rights registration procedures, time and fees are respectively 4.76 items, 6.30 working days and 4.31%. Credit loan handling procedures, application materials and handling time are respectively 4.09 steps, 4.97 items and 7.91 working days. Power access handling procedures, application materials and handling time are respectively 4.39 steps, 4.31 items and 7.17 working days. Water and gas access handling procedures, application materials and handling time are respectively 4.37 steps, 4.62 items and 6.01 working days. Business cancellation materials, fees, procedures and time are respectively 4.75 items, 149.23 yuan, 3.87 steps and 7.11 working days. In bankruptcy liquidation, the average proceedings expense rate is 4.31%, and the liquidation recovery rate is 6.79%.

Table 2-16 Overall information on sub-indicators of business establishment and exit environment

Item		Average	Item		Average
Business establishment	Procedures (items)	4.81	**Property rights registration**	Procedures (items)	4.76
	Time (working days)	6.50		Time (working days)	6.30
	Expense rate (% of per capita income)	7.23		Expense rate (% of property value)	4.31
Construction permits	Handling procedures (items)	5.11	**Credit loan**	Handling procedures (steps)	4.09
	Handling time (working days)	7.97		Application materials (items)	4.97
	Handling fees (%)	6.04		Handling time (working days)	7.91
Power access	Handling procedures (steps)	3.59	**Business cancellation**	Materials (items)	4.75
	Application materials (items)	4.31		Fees (yuan)	149.23
	Handling time (working days)	7.17		Procedures (steps)	3.87
Water and gas access	Handling procedures (steps)	4.37		Time (working days)	7.11
	Application materials (items)	4.62	**Bankruptcy proceedings expense rate (%)**		4.31
	Handling time (working days)	6.01	**Liquidation recovery rate (%)**		6.79

(2) Regional evaluations are different, and the evaluation in the central area is higher.

From a regional perspective, the evaluation of business establishment and exit environment is the highest in the central area (4.31 points), followed by the east (4.20 points), and the west gives a lower score (4.14 points).

从企业满意度看，西部与东中部企业满意度差异较大，东、中部企业差异不大。其中，中部略高，较满意及以上企业占比为83.80%；东部次之，为83%；西部较低，为76.60%。

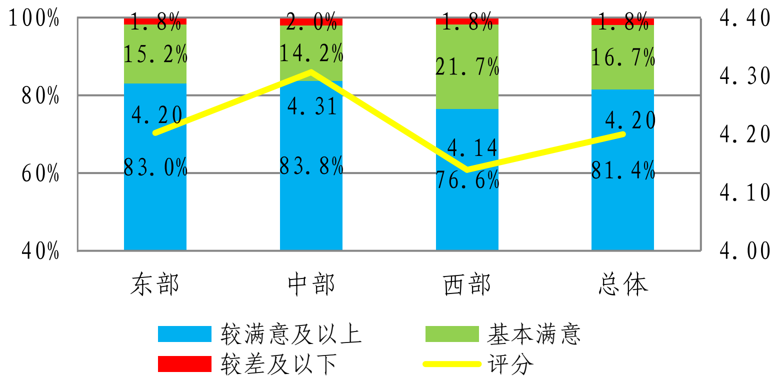

图2-112 各地区对企业设立与退出环境综合评价图

从企业设立与退出环境细分指标看，中部企业对三项细分指标评价均为最高，其中，对土地获取评分最高（4.32 分）；西部企业对三项细分指标评价均为最低，其中，对破产手续办理评价最低（4.04 分）；各地区对破产手续办理评价差异最大，最高与最低值相差 0.28 分。

表 2-17 各地区对企业设立与退出环境细分指标的评价

排序	土地获取		环保手续		破产手续办理		企业设立与退出
	地区	得分	地区	得分	地区	得分	
1	中部	4.34	中部	4.32	中部	4.32	中部
2	东部	4.18	东部	4.26	东部	4.19	东部
3	西部	4.17	西部	4.09	西部	4.04	西部

（三）行业间评价梯度分明，资源行业较高，服务行业、建筑业较低

从行业角度看，各行业评价差异明显。其中，资源行业（4.33 分）、传统制造业（4.28 分）和其他行业（4.25 分）评价均超 4.25 分，属于第一梯队；高新技术产业（4.16 分）和建筑业（4.13 分）评价在 4.10 分 -4.20 分之间，属于第二梯队；服务行业（4.01 分）评价低于 4.10 分，属于第三梯队。

从企业满意度看，行业间评价差异较大。其中，资源行业（87%）和传统制造业（85.10%）较满意及以上企业占比均超 85%；其他行业（83.10%）和高新技术产业（80%）在 80%-85% 之间；服务行业（73.80%）和建筑业（70.20%）较低；较满意及以上企业占比最高与最低值相差 16.8 个百分点。

From the perspective of satisfaction rate, the west is quite from the east and the central area, and the difference between the east and the central area is small. The central area has a slightly higher satisfaction rate of 83.80%, followed by the east at 83%, and the west has a lower satisfaction rate of 76.60%.

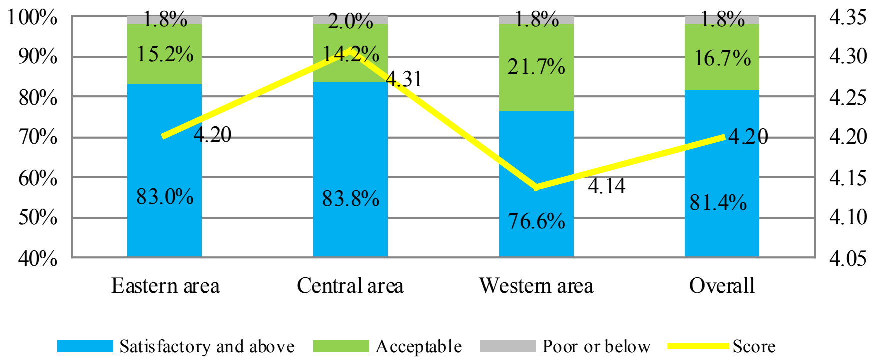

Chart 2-112 Comprehensive evaluation of business establishment and

For the sub-indicators of business establishment and exit environment, the central area gives the highest evaluations to the three sub-indicators, with access to land getting the highest score (4.32 points). The western area gives the lowest to all the three sub-indicators, with bankruptcy formalities getting the lowest (4.04 points). Regional evaluations of bankruptcy formalities show the largest difference of 0.28 points.

Table 2-17 Evaluation of business establishment and exit environment sub-indicators in different areas

Ranking	**Access to land**		**Environmental formalities**		**Bankruptcy formalities**		**Business establishment and exit**
	Area	Score	Area	Score	Area	Score	
1	Central area	4.34	Central area	4.32	Central area	4.32	Central area
2	Eastern area	4.18	Eastern area	4.26	Eastern area	4.19	Eastern area
3	Western area	4.17	Western area	4.09	Western area	4.04	Western area

(3) Industry evaluations show a clear tiered distribution pattern, and the resource industry gives a high evaluation and the service industry and building industry give lower evaluations.

From an industry perspective, evaluations are quite different. The resource industry (4.33 points), traditional manufacturing industry (4.28 points) and other industries (4.25 points) all give scores over 4.25 points, belonging to the first tier. The high-tech industry (4.16 points) and the building industry (4.13 points) are between 4.10 and 4.20 points, belonging to the second tier. The service industry (4.01 points) is lower than 4.10 points, belonging to the third tier.

Regarding satisfaction rate, industries are quite different. The resource industry (87%) and traditional manufacturing (85.10%) exceed 85%. Other industries (83.10%) and high-tech industry (80%) are between 80% and 85%. The service industry (73.80%) and building industry (70.20%) are lower. The highest value and the lowest have a difference of 16.8 percentage points.

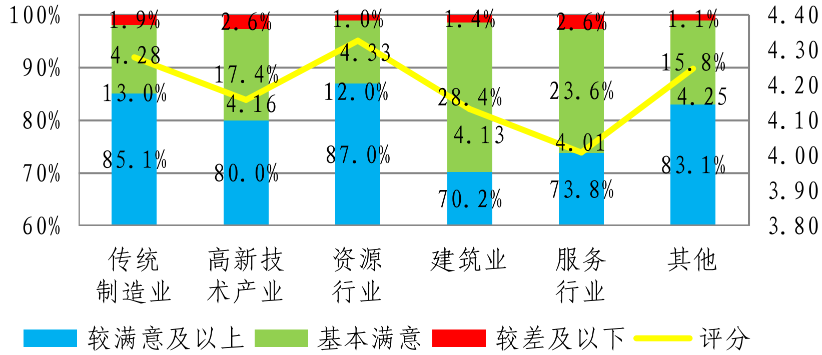

图2-113 不同行业对企业设立与退出的满意度占比图

从企业设立与退出环境细分指标看，各行业评价差异较大。其中，资源行业对各项细分指标评价均为最高，其中，对环保手续评分最高（4.43分）；服务行业对各项细分指标评价均为最低，其中，对土地获取评分最低（3.93分），最高与最低评分值相差0.50分。

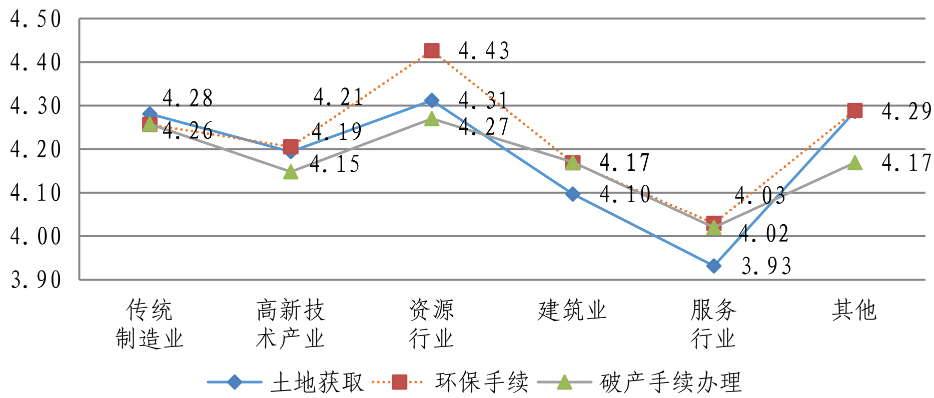

图2-114 不同行业对企业设立与退出细分指标的评价图

1. 传统制造业开办企业程序多，高新技术产业耗时长、费用高。

不同行业开办企业流程复杂程度，耗时与费用差异不大。从开办企业程序均值看，传统制造业所需流程最多（5.46项），服务行业最少（4.24项），其余行业在4.40项-4.95项之间。

从开办企业时间看，高新技术产业耗时最长（8.81天），传统制造业和服务行业次之（分别为6.69天、6.40天），最短为资源行业（4.90天）。

从开办企业费用看，平均费用最高为高新技术产业（9.30%），其他行业和传统制造业次之（分别为7.90%、6.69%），最低为资源行业（4.70%）。其余行业均在5.0%-6.0%之间。

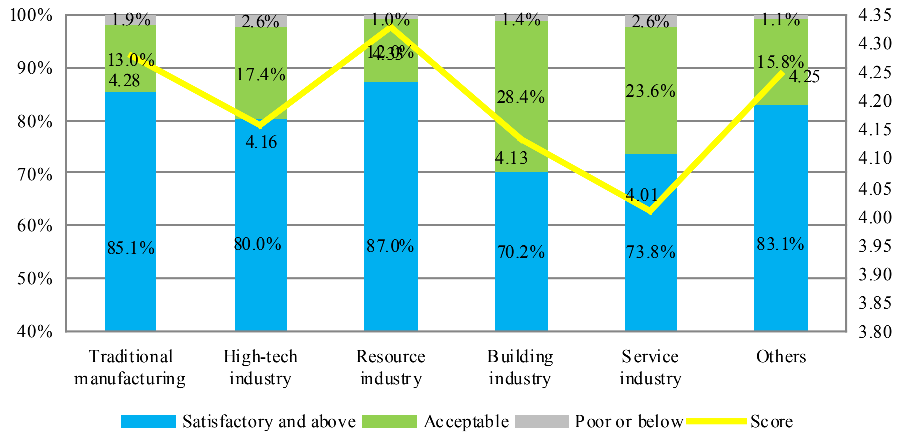

Chart 2-113 Proportion of satisfaction rate of business establishment and exit environment in different industries

In terms of the sub-indicators of business establishment and exit environment, industry evaluations are quite different. The resource industry gives the highest evaluations to all the sub-indicators, with the highest score given to environmental formalities (4.43 points); the service industry gives the lowest evaluations to the sub-indicators, with the lowest given to access to land (3.93 points). The highest and lowest scores differ by 0.50 points.

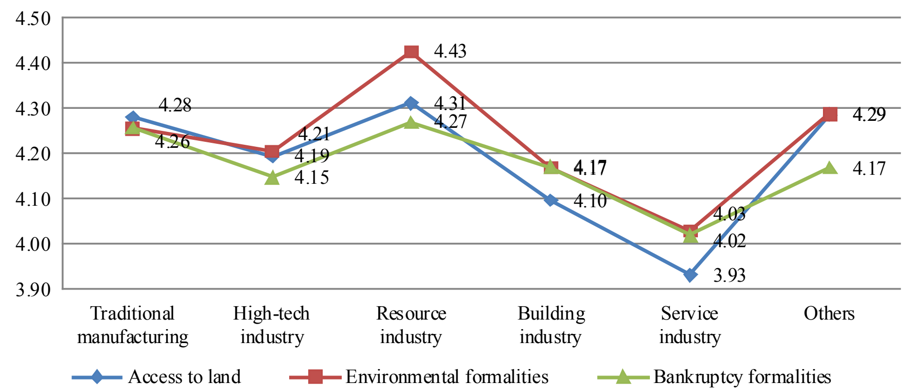

Chart 2-114 Evaluation of business establishment and exit sub-indicators in different industries

1. There are many procedures for starting a business in the traditional manufacturing industry, and the high-tech industry needs a long time and high fees.

The complexity of the procedures, time and fees required to start a business in different industries are not much different. Based on the average business establishment procedures, the traditional manufacturing industry has the most procedures (5.46 items), and the service industry has the least (4.24 items). The rest industries are between 4.40 and 4.95 items.

Seen from the time required to start a business, the high-tech industry spends the longest time (8.81 days), followed by traditional manufacturing and service industry (6.69 days and 6.40 days respectively), and resource industry is the least time-consuming industry (4.90 days).

Seen from the fees required to start a business, the high-tech industry has the highest average fees (9.30%), followed by other industries and traditional manufacturing (7.90% and 6.69% respectively), and the resource industry is the least money-consuming (4.70%). The rest industries are between 5.0% and 6.0%.

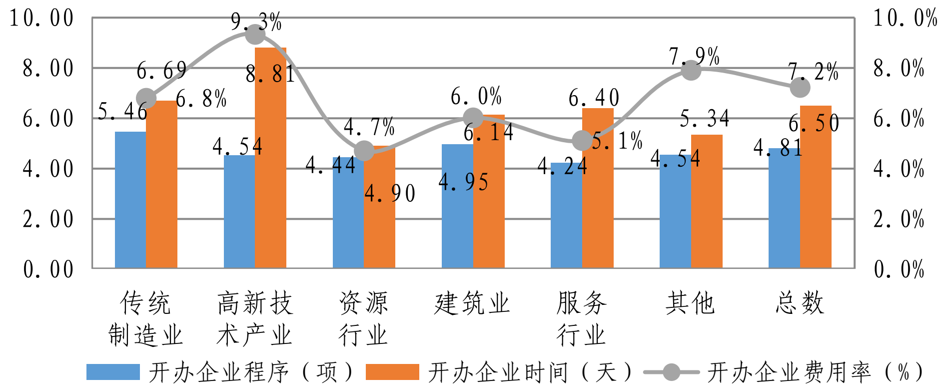

图2-115 不同行业平均开办企业程序、时间与费用

2. 高新技术产业施工许可办理流程多、耗时较长、费用高。

从办理流程看，不同行业办理施工许可所需流程数较接近。其中，高新技术产业流程数目最多（6.23 项），传统制造业次之（5.45 项），其余行业所需项数均少于 5 项，最少为其他行业（4.42 项）。

从办理耗时看，各行业差异较大。高新技术产业耗时最长（12.88 天），资源行业和传统制造业次之（分别为 8.08 天、8.01 天），其余行业均少于 7 天。

从办理费用看，各行业差异较大。其中，高新技术产业办理施工许可费用高达 12.88%，传统制造业次之（8.0%），最低为其他行业（3.80%）。

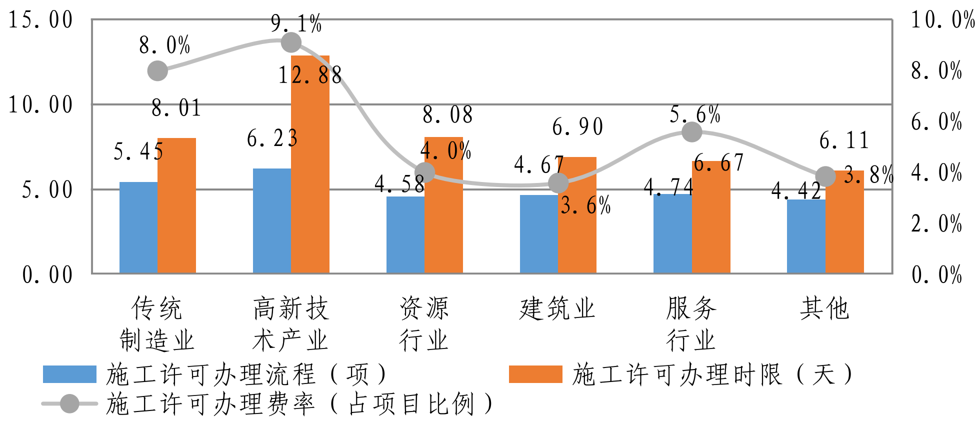

图2-116 不同行业办理施工许可的平均程序与费用

3. 高新技术产业产权登记所需流程多、耗时长，资源行业费用高。

各行业办理产权登记程序数接近。办理产权登记需要流程数目均值最高为高新技术产业（5.84 项），服务行业次之（5.44 项）；其余行业均低于 5 项，最低为资源行业（4.04 项）。

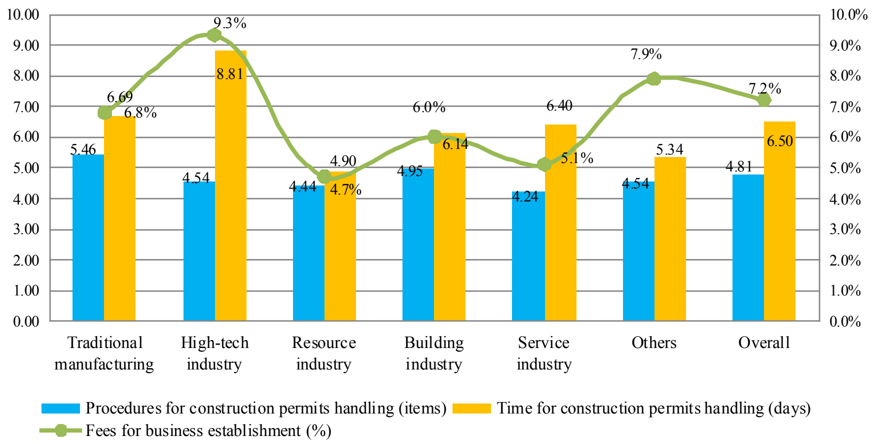

Chart 2-115 Average procedures, time and fees for business establishment in different industries

2. The high-tech industry needs to go through many procedures, spend a long time and pay high fees to handle construction permits..

From the perspective of handling procedures, different industries need to go through a similar number of procedures to get construction permits. The high-tech industry faces the most procedures (6.23 items), followed by traditional manufacturing (5.45 items), and the rest industries face less than 5 items, with the least items in other industries (4.42 items).

Seen from the handling time, industries vary greatly. The high-tech industry spends the longest time (12.88 days), followed by the resource industry and the traditional manufacturing industry (8.08 days and 8.01 days respectively), and the rest industries spend less than 7 days.

Seen from handling fees, industries vary greatly. The high-tech industry has a construction permit handling fee of 12.88%, followed by traditional manufacturing (8.0%), and the lowest is in other industries (3.80%).

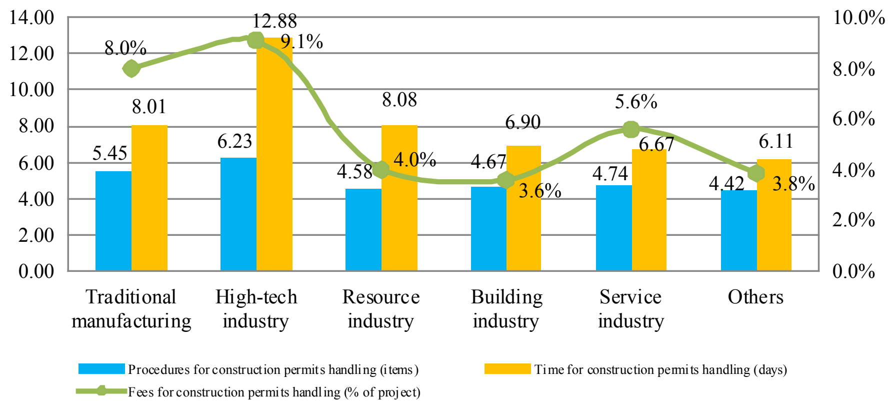

Chart 2-116 Average procedures and fees for construction permits handling in different industries

3. The high-tech industry needs to go through many procedures and spend a long time for property rights registration, and the resource industry has high fees.

Different industries need to go through a similar number of procedures for property rights registration. The high-tech industry faces the most procedures (5.84 items), followed by the service industry (5.44 items). The rest industries face less than 5 items, with the least items in the resource industry (4.04 items).

办理产权登记耗时与费用方面，耗时均值最高者为高新技术产业（11.27 天），服务行业次之（6.56 天），其余行业均低于 6 天，最低为资源行业（4.00 天）；费用均值最高者为资源行业（5.20%），服务行业次之（5.00%），最低为建筑业（3.70%）。

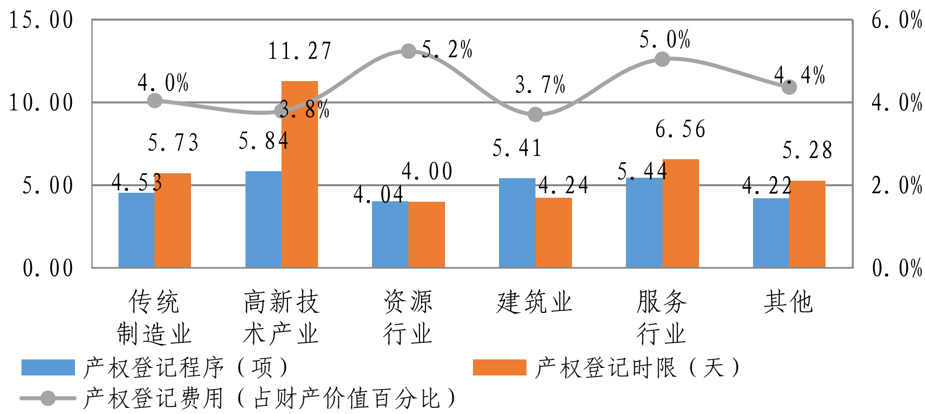

图2-117 不同行业平均产权登记程序、时间和费用

4. 资源行业破产诉讼费用和清算回收率最高。

各行业之间破产诉讼费和清算回收水平存在差异。破产诉讼费用均值最高为资源行业（5.70%），服务行业次之（4.44%），其余均低于 4%，最低为建筑业（3.95%）。清算回收率均值最高也是资源行业（21.42%），高新技术产业次之（8.41%），最低为建筑业（4.43%）。

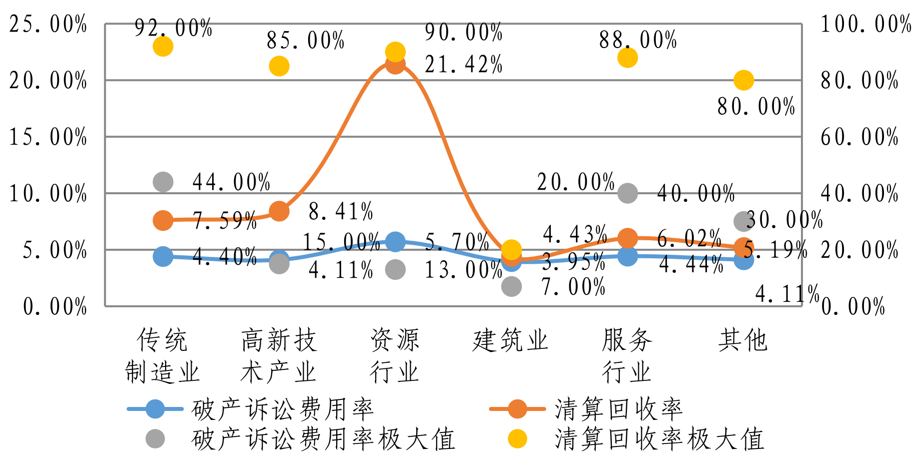

图2-118 不同行业平均破产成本与清算回收率

In terms of time and fees required for property rights registration, the high-tech industry spends the longest time (11.27 days), followed by the service industry (6.56 days), and the rest industries spend less than 6 days, with the least days in the resource industry (4.00 days). The resource industry has the highest fees (5.20%), followed by the service industry (5.00%), and the lowest is in the building industry (3.70%).

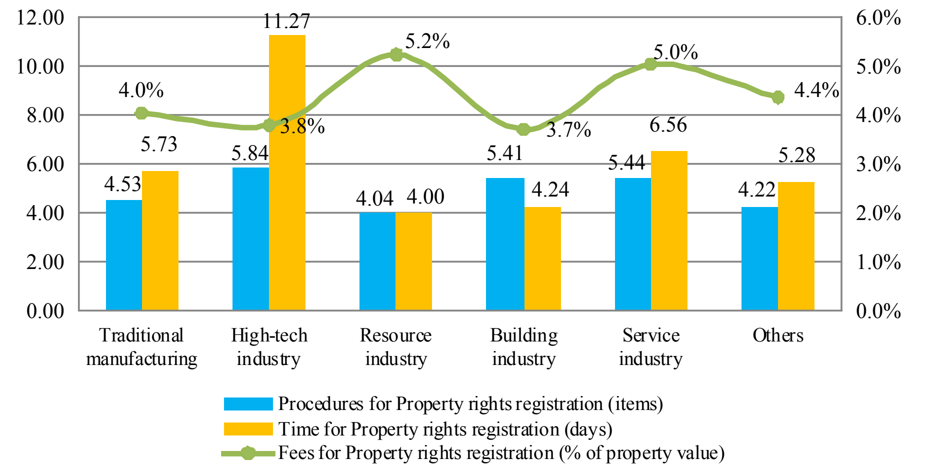

Chart 2-117 Average procedures, time and fees for Property rights registration in different industries

4. The resource industry has the highest bankruptcy proceedings expense rate and liquidation recovery rate.

There are differences in the levels of bankruptcy proceedings cost and liquidation recovery in various industries. The resource industry has the highest bankruptcy proceedings cost (5.70%), followed by the service industry (4.44%), and the rest industries are all below 4%, with the building industry having the lowest (3.95%). The resource industry also has the highest liquidation recovery rate (21.42%), followed by the high-tech industry (8.41%), and the lowest is in the building industry (4.43%).

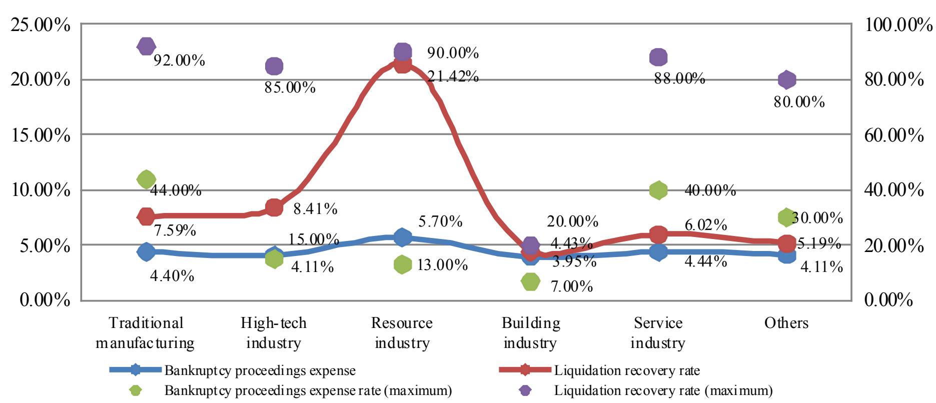

Chart 2-118 Average bankruptcy expense rate and liquidation recovery rate in different industries

（四）2019 年企业设立与退出环境评价高于上年

从企业评价均值看，2018 年企业设立与退出环境评价为 4.03 分，2019 年为 4.274 分，提高 0.244 分。

1. 土地获取评价提升最快，破产手续办理提升幅度小。

从企业设立与退出环境细分指标评价看，与 2018 年比，2019 年各项指标均有提升。其中，土地获取由 2018 年 4.08 分提至 2019 年 4.21 分，提高 0.13 分，提升幅度最大；环保手续由 4.10 分提高到 4.22 分，提高 0.12 分；破产手续办理提升幅度略小，提高 0.11 分。

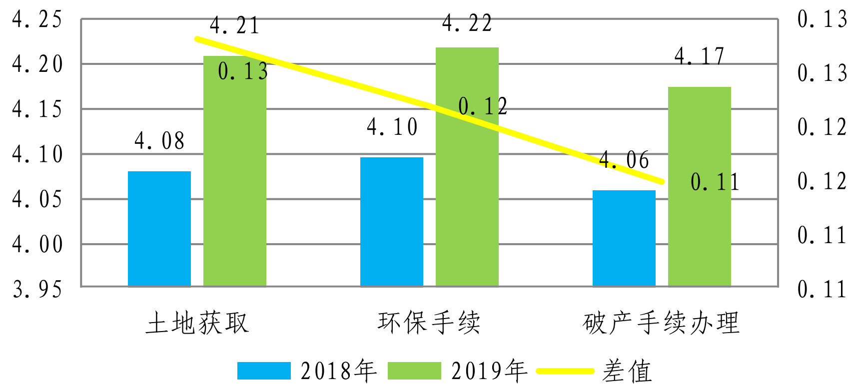

图2-119 企业设立和退出细分指标年度评价对比图

2. 大部分地区均有不同程度提升，中西部企业评价提升快。

从不同地区企业评价看，与 2018 年相比，2019 年各地区均出现不同程度的提升。其中，中西部企业评价提升较快，均提高了 0.14 分；东部略慢，提高了 0.10 分。

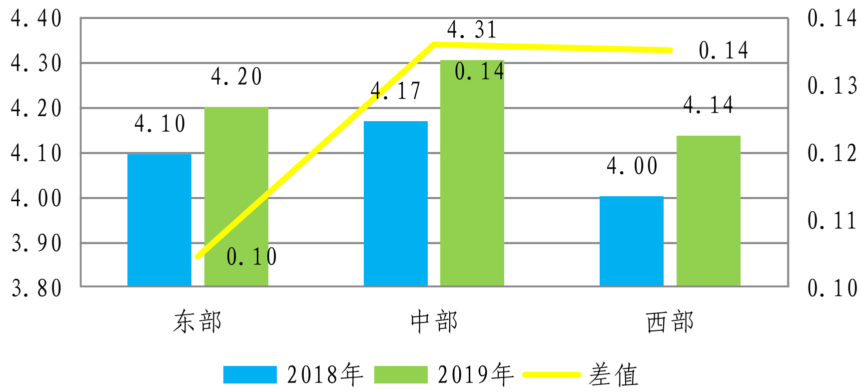

图2-120 企业设立和退出环境不同地市年度评价对比图

(4) The overall score of business establishment and exit environment in 2019 is higher than that in 2018.

Based on the average value of evaluations, the overall score of business establishment and exit environment in 2018 was 4.03 points, and has risen to 4.274 points in 2019, up by 0.244 points.

1. Access to land sees the fastest increase and bankruptcy formalities sees a small increase in their evaluation results.

For the sub-indicators of business establishment and exit environment, compared with 2018, all sub-indicator evaluations have improved in 2019. Access to land has increased from 4.08 in 2018 to 4.21 in 2019, an increase of 0.13 points, the largest increase; environmental formalities has increased from 4.10 to 4.22, an increase of 0.12 points; bankruptcy formalities has increased slightly, by 0.11 points.

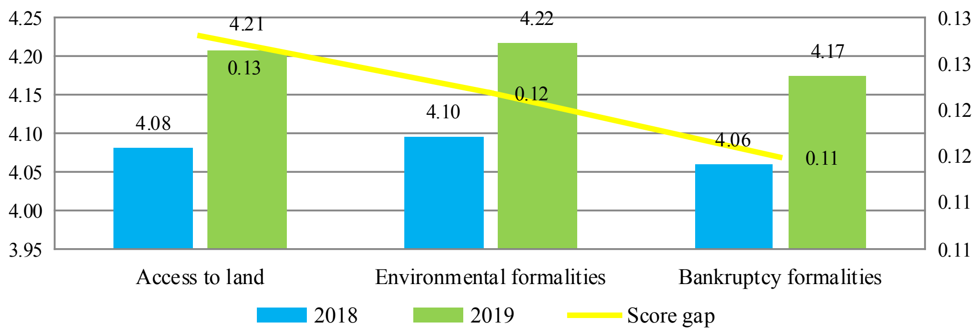

Chart 2-119 Comparison of annual evaluation of satisfaction rate of business establishment and exit environment sub-indicators

2. Most regional evaluations have improved to different degrees, and the increases in the central and western areas are rapid.

From a regional perspective, compared with 2018, there are different degrees of improvements in the evaluations by all areas in 2019. The central and western areas see rapid increases, both by 0.14 points; the eastern part sees a slightly slower increase, by 0.10 points.

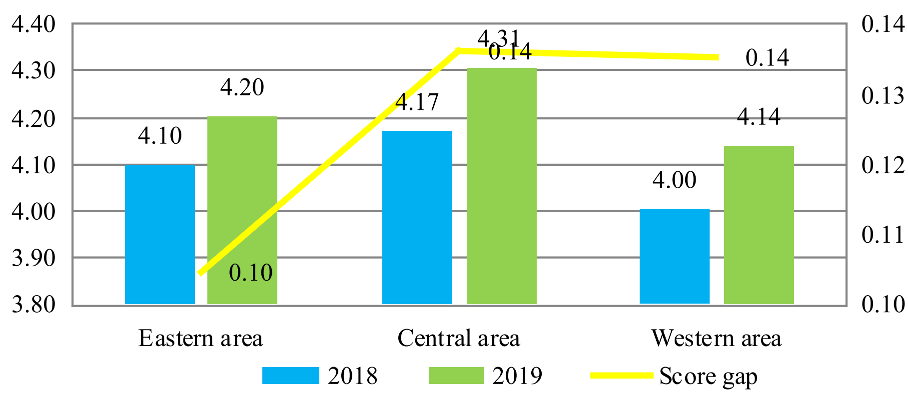

Chart 2-120 Comparison of annual evaluation of business establishment and exit environment in different areas

3. 各行业评价提升较明显，资源行业提升幅度最大。

从行业角度分析，与 2018 年相比，2019 年各行业评价提升幅度不一。其中，资源行业提升最明显，由2018年的4.06分提至2019年的4.38分，提高了0.32分，提升7.88%；高新技术产业评价提升最少，提高了 0.12 分。

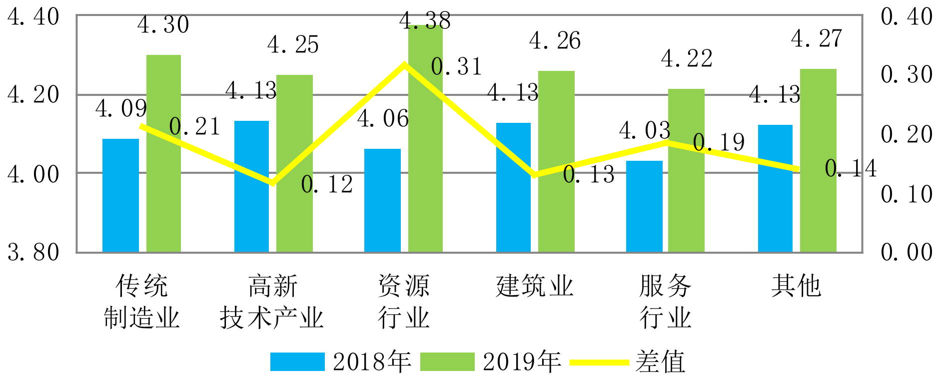

图2-121 企业设立和退出环境不同行业年度评价对比图

3. Evaluations in various industries have obviously improved, and the resource industry sees the largest increase.

From an industry perspective, compared with 2018, evaluations by various industries have improved to different degrees in 2019. The resource industry sees the most obvious improvement, from 4.06 points in 2018 to 4.38 points in 2019, an increase of 0.32 points, up by 7.88%; the high-tech industry sees the smallest increase, by 0.12 points.

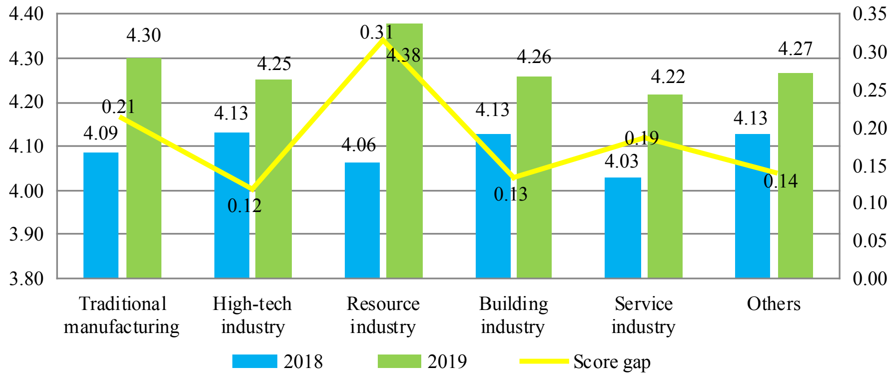

Chart 2-121 Comparison of annual evaluation of business establishment and exit environment in different industries

第三章 中国企业经营与投资状况

一、九成以上企业实现营收正增长

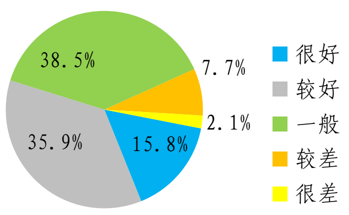

图3-1 当前企业营业收入增长状况

2019 年 15.80% 的企业营业收入增长幅度在 10% 以上，收益表现很好；35.90% 的企业营收增长幅度在 5%-10%，收益较好；收益一般（营收增幅为 1%-5%）的企业占比最大，为 38.50%； 9.80% 的企业营业收入在负值以内，其中，营收降幅超过 10% 的企业占 2.10%。整体来看，半数以上企业收益状况维持在较好及以上（51.70%），营收正增长占比为 90.20%，企业运营状况良好。

（一）各地区投资收益差异较大，中部收益较好及以上企业超过七成

与总体平均投资收益水平相比，东、中部企业收益很好和较好企业均超过全国平均水平；中部收益较好及以上占比最高（54.70%），西部收益较好及以上占比最低（仅 47.00%），低于全国均值水平；西部收益一般占比最高（41.30%）；中西部收益较差及以下占比均超 10%，其中，中部最高（13.30%）。

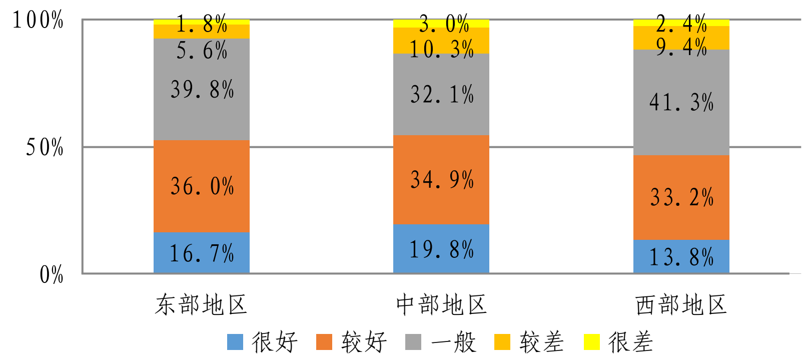

图3-2 分地区投资收益图

Chapter III. Operation and Investment Status of Chinese Enterprises

I. Over 90% of enterprises see positive growth in operation revenue

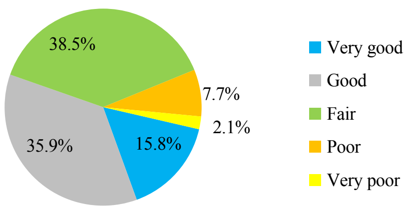

Chart 3-1 Growth of operation revenue of enterprises

In 2019, 15.80% of enterprises see an operating revenue increase by more than 10%, indicating a very good revenue performance; 35.90% of enterprises see an operating revenue increase ranging from 5% to 10%, indicating a good revenue performance; enterprises with a "fair" revenue performance (operating revenue increase is 1%-5%) account for the biggest proportion of 38.50%; 9.80% of enterprises have a negative operating revenue, in which those with a revenue decrease over 10% account for 2.10%. Overall, more than half of enterprises (51.70%) maintain a good or very good level of revenue, and those with positive growth of revenue account for 90.20%. Enterprises are in good operation.

(1) The investment return in each area is quite different, and the central area has more than 70% of enterprises with good or very good returns.

Compared with the overall average investment return, enterprises with good or very good returns in the eastern and central areas have surpassed the national average; the central area has the highest proportion of enterprises with good or very good returns (54.70%), and the western area has the lowest (at only 47.00%), lower than the national average; the western area has the highest proportion of enterprises with fair returns (41.30%); the proportion of enterprises with poor or very poor returns exceeds 10% in both central and western areas, of which the highest proportion in the central area (13.30%).

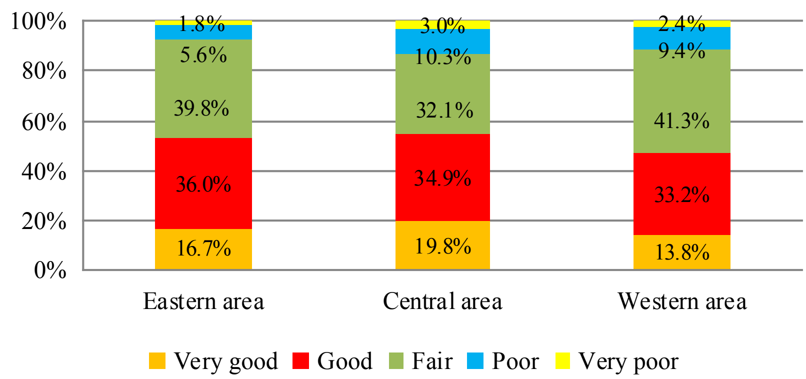

Chart 3-2 Return on investment in different areas

（二）近七成高新技术企业投资收益较好及以上

不同行业投资收益存在差异。高新技术产业投资收益表现最好，较好及以上企业占比高达 69.70%；资源行业和建筑业次之，分别为 60.90%、55.10%，其他行业最低，为 46.8%。其中，高新技术产业“很好”和“较好”的占比均为最高（分别是 26.70%、43.00%），超四成其他行业投资收益表现“一般”（42.70%），较好以上企业不足五成。只有极少数企业收益很差，各行业占比均不超 3%。

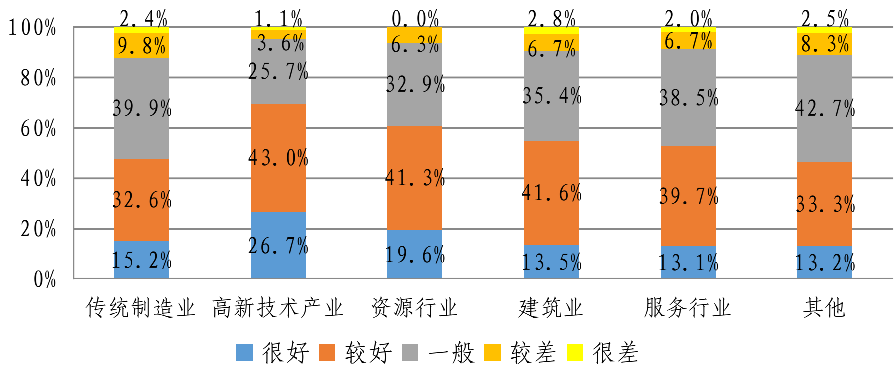

图 3-3 不同行业企业投资收益图

（三）不同所有制企业投资收益差异较小，超一半为较好及以上

不同所有制企业的投资收益状况差异较小，收益很好及较好的企业占比均超 50%。在收益很好的企业中，国有企业、其他企业均超两成，分别为 22.50%、21.60%；私营企业和外商独资企业次之，分别为 15.60%、14.20%。在收益较好的企业中，合伙企业和集体企业占比均超四成，分别为 54.5%、48.70%，其余行业企业占比在 30%-40% 之间。在私营企业和集体企业中，收益一般企业占比较高，分别为 39.90%、38.60%。

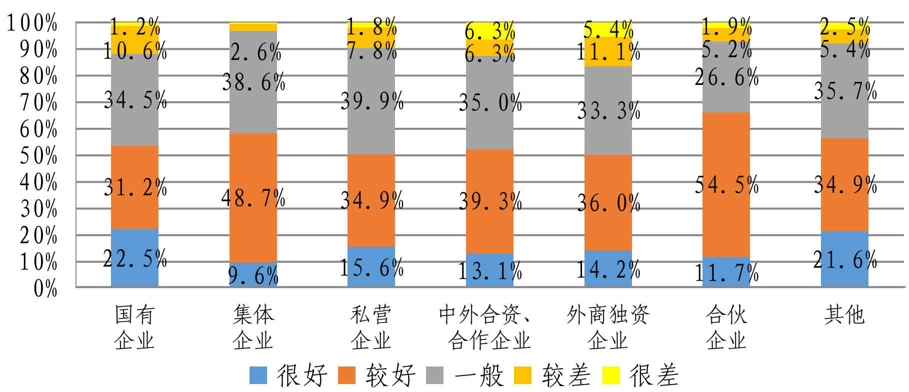

图 3-4 不同所有制企业投资收益图

(2) Nearly 70% of high-tech enterprises have good or very good investment returns.

There are differences in investment returns in different industries. The investment return in the high-tech industry is the best, with the proportion of enterprises with good or very good returns reaching as high as 69.70%; the resource industry and building industry rank second, with proportions of 60.90% and 55.10%, respectively, and the lowest is in other industries, at 46.8%. The high-tech industry has the highest proportions of enterprises with good or very good returns (26.70% and 43.00% respectively), and over 40% (42.70%) of enterprises in other industries have fair returns, while enterprises with good or very good returns are less than 50%. Only a very small number of enterprises have very poor returns, and the proportion does not exceed 3% in each industry.

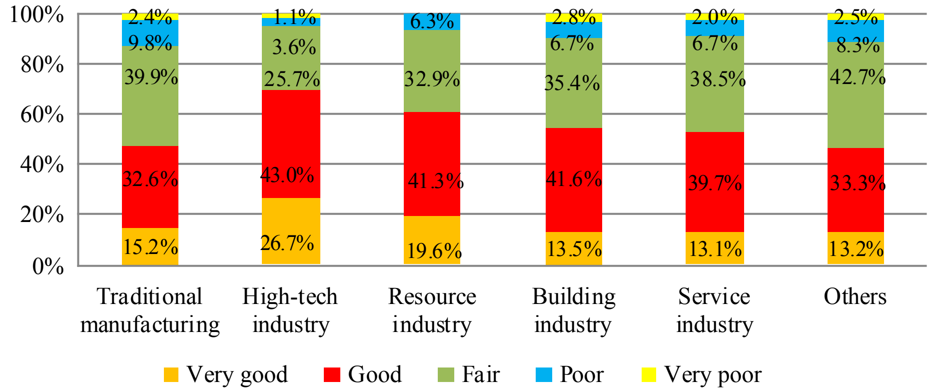

Chart 3-3 Return on investment in different industries

(3) The investment return in different natures of enterprises is not that different, and more than half have good or very good returns.

The differences in the investment returns of different types of enterprises are small, and the proportion of enterprises with good or very good returns is over 50% in each type of enterprises. Among enterprises with very good returns, both state-owned enterprises and other types of enterprises exceed 20%, respectively at 22.50% and 21.60%, followed by private enterprises and wholly foreign-owned enterprises, respectively at 15.60% and 14.20%. Among enterprises with good returns, both partnership and collectively-owned enterprises exceed 40%, at 54.5% and 48.70% respectively, and the rest enterprises account for 30%-40%. Among private and collectively-owned enterprises, enterprises with fair returns take up high proportions, at 39.90% and 38.60% respectively.

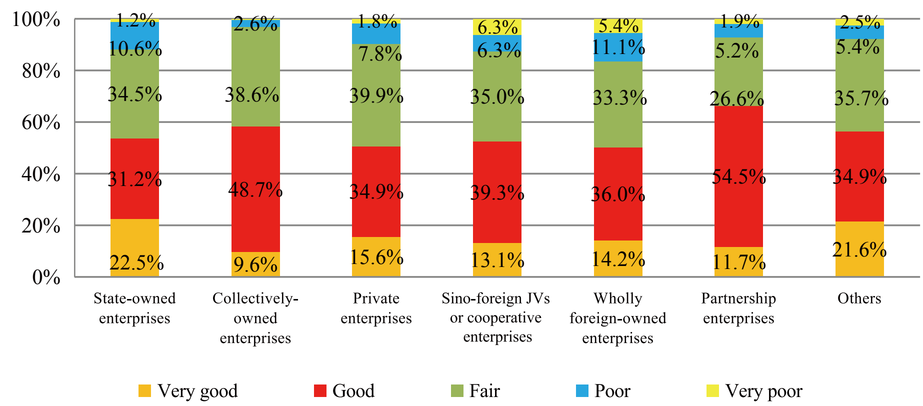

Chart 3-4 Return on investment in enterprises of different natures

（四）企业收益出现下滑，高新技术企业逆势增长

与 2018 年相比，2019 年收益较好及以上企业占比略有下降，由 2018 年的 54.99% 降至 2019 年的 51.74%，下降了 3.25 个百分点，但收益很好的企业占比略有提升，由 2018 年的 13.70% 提至 2019 年的 15.80%，提高了 2.1 个百分点；较差及以下企业占比有所提升，提高 3.35%，可见全国范围内企业收益略有下降。

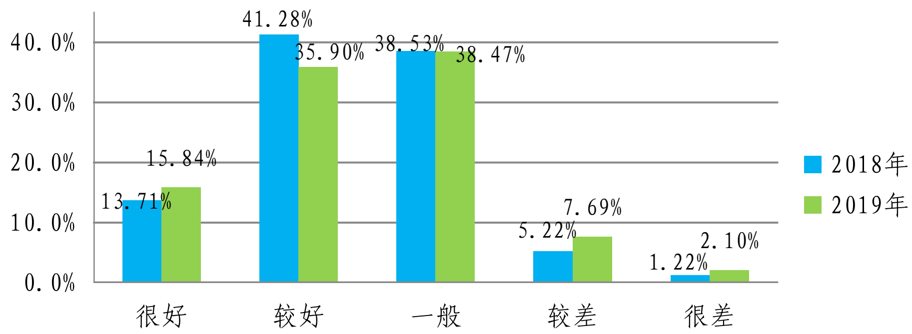

图3-5 企业收益情况年度对比图

各地区企业收益变动幅度较大，与 2018 年相比，2019 年大部分地区收益出现下滑。其中，东、中部企业收益很好的占比均有提升，中部提升明显，提高了 6.40%；西部略有下降（-1.60%）。在收益较好的企业，各地区均出现下降，其中，西部下滑特别明显，下降 20.1%。收益为正的比例超过 2018 年的地区仅有东部，且提升幅度不明显，仅提高 0.30%。在收益为负的企业，各地区均出现提升，西部提升幅度最大，提高了 7 个百分点。整体看，企业收益出现下滑。

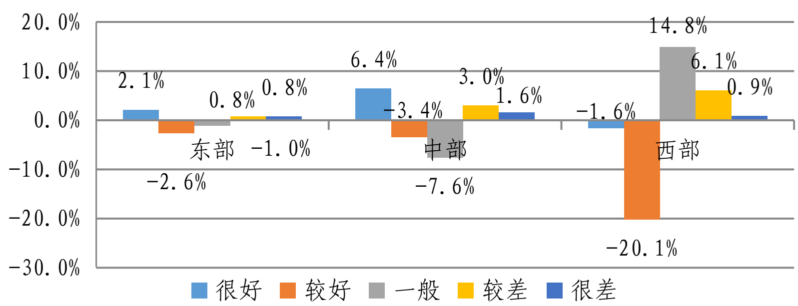

图3-6 2018年与2019年各地区收益差值情况对比图

从不同行业角度看，与 2018 年相比，2019 年大部分行业营收为正企业占比出现下降，但高新技术产业逆势增长，收益为正企业占比由 2018 年的 94% 提升至 2019 年的 95.40%，其中，增幅 10% 以上企业占比增速最快，由 2018 年的 23.10% 提至 2019 年

(4) Returns of enterprises show declines, and high-tech enterprises grow against the trend.

Compared with 2018, the proportion of enterprises with good or very good returns in 2019 has slightly decreased, from 54.99% in 2018 to 51.74% in 2019, a decrease of 3.25 percentage points. However, the proportion of enterprises with very good returns has slightly increased, from 13.70% in 2018 to 15.80% in 2019, an increase of 2.1 percentage points; the proportion of enterprises with poor or very poor returns has increased by 3.35%, showing a slight decline in corporate revenue across the country.

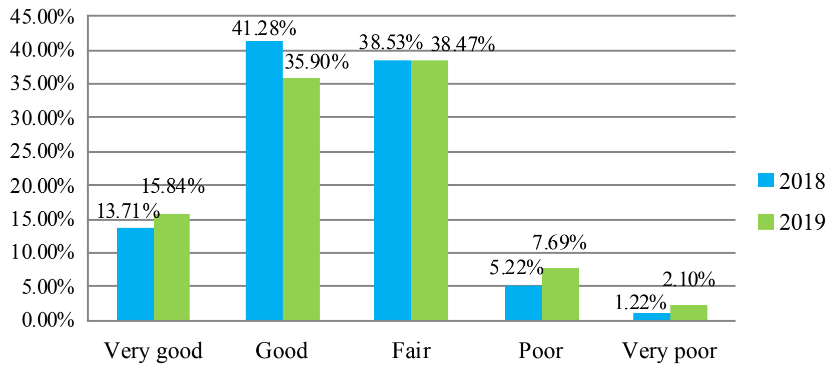

Chart 3-5 Comparison of revenue on a yearly basis

The changes in the revenue of enterprises in various areas are large. Compared with 2018, the revenue in most areas in 2019 has declined. The proportion of enterprises with very good returns has increased in both eastern and central areas, with the central area seeing a significant increase of 6.40%; the proportion slightly declines in the west (-1.60%). In enterprises with good returns, all areas have experienced declines. The decline in the west is particularly noticeable, down by 20.1%. Only the eastern area has a proportion of enterprises with positive revenues higher than that in 2018, and the increase is not obvious, only by 0.30%. In enterprises with negative revenues, all areas show increases, and the increase in the west is the biggest, by 7 percentage points. Overall, corporate revenue has declined.

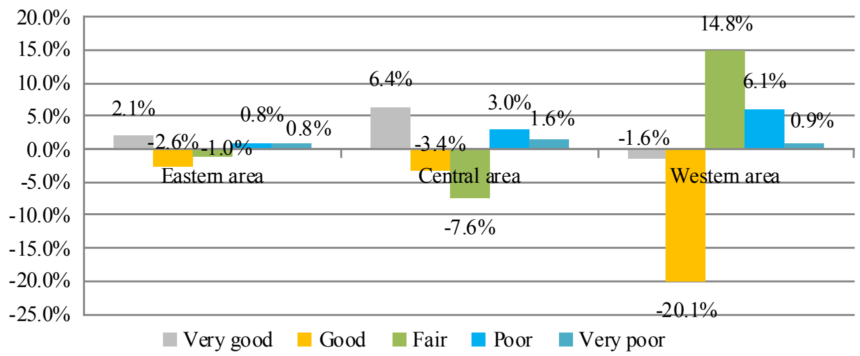

Chart 3-6 Comparison of revenue in different areas in 2018 and 2019

From an industry perspective, compared with 2018, the proportion of enterprises with positive revenues has declined in most industries in 2019, but the high-tech industry grows against the trend, with the proportion increasing from 94% in 2018 to 95.40% in 2019. The growth rate of the proportion of enterprises with an increase of more than 10% is the fastest, from 23.10% in 2018 to 26.70% in 2019. The proportion of enterprises

的 26.70%。收益为正的建筑业企业占比下降最快（由 2018 年的 97% 下降至 2019 年的 90.50%）。

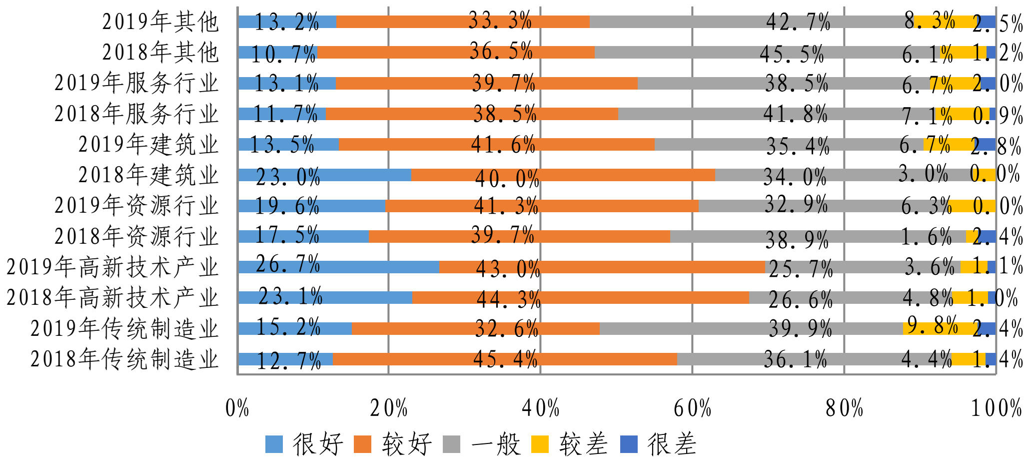

图3-7　不同行业企业年度收益情况对比图

二、近五年企业收益变动趋势乐观

（一）近五年中国企业投资收益呈良性变动趋势

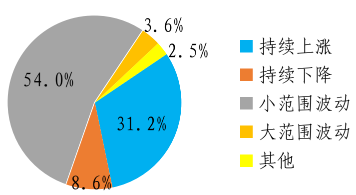

图3-8　近5年收益状况变动趋势图

31.20% 的企业近五年的收益持续上涨，运营情况良好，仅有 8.60% 的企业反映近五年来收益持续下降。超半数企业反映近五年投资收益在小范围内波动（54.00%），仅有 3.60% 企业反映大范围内波动。整体看，近五年收益持续上涨和在小范围内波动的企业超八成（85.20%）。

（二）各地区投资收益出现持续上涨的企业占比均超三成

近五年，各地区投资收益变动幅度不大，小范围波动企业占比均超五成，其中，东部最高（54.60%）、中部较低（50.40%）；各地区企业持续上涨占比均超三成且差异不明显，其中，中部最高（33.90%）、西部次之（32.80%）；各地区企业持续下降占比均不高，其中，中部持续下降占比最高（10.80%）、东部最低（8%）；企业出现大范围波动的情况较少，各地区企业占比均低于 4%。

with positive revenues drops the fastest in the building industry (from 97% in 2018 to 90.50% in 2019).

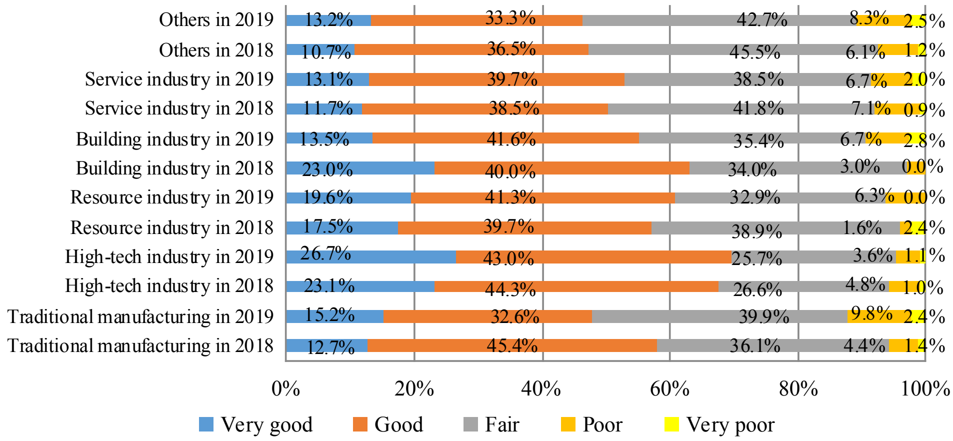

Chart 3-7 Comparison of revenue on a yearly basis

II. Change trend of revenue in the past 5 years is promising

(1) The investment return of Chinese enterprises shows a favorable change trend in the past five years.

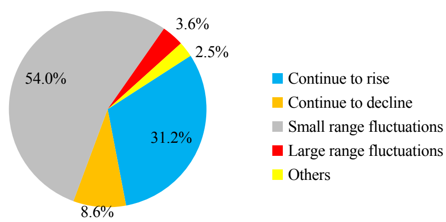

Chart 3-8 Change trend of revenue in the past 5 years

31.20% of enterprises see continuous increases in their returns in the past five years, and their operations are in good condition. Only 8.60% report continuous declines in their returns in the past five years. More than half (54.00%) report small-range changes in investment returns in the past five years, and only 3.60% report large-scale fluctuations. Overall, in the past five years, over 80% (85.20%) of enterprises see continuous increases and small-range changes in their returns.

(2) The proportion of enterprises whose investment returns have continued to rise exceeds 30% in all areas.

In the past five years, the investment returns in various areas have not changed much, and the proportion of enterprises with small-scale fluctuations of returns exceeds 50% in all areas, among which the east has the highest proportion (54.60%) and the central area has a lower proportion (50.40%); the proportion of enterprises whose investment returns have continued to rise exceeds 30% in all areas, without large differences. The highest is in the central area (33.90%), followed by the west (32.80%); the proportion of enterprises whose returns have continued to decline is not high in each area, with the highest proportion in the central area (10.80%) and the lowest in the east (8%); there are only a few cases of large-scale fluctuations of returns, and the proportion of such enterprises is under 4% in all areas.

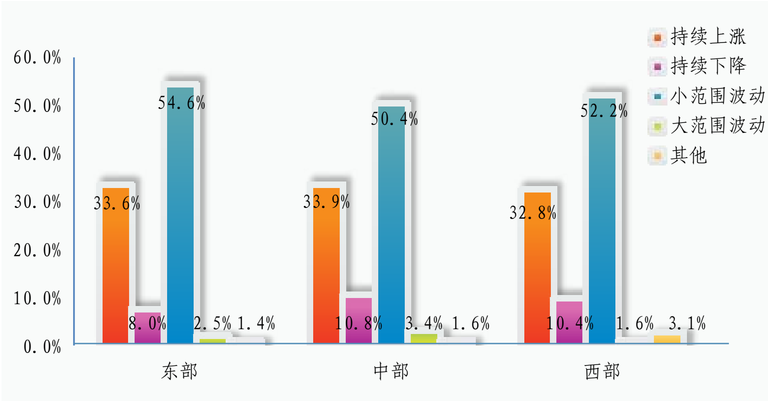

图3-9 不同地区企业近5年投资收益变动趋势

（三）资源行业和高新技术产业持续上涨比例最高

分行业看，资源行业和高新技术产业持续上涨比例居前二位，分别为 44.10% 和 41.00%，呈现出良好的发展态势；服务行业持续下降占比最高，为 10.70%；建筑业小范围波动占比最高，达 62.80%；收益出现大范围波动占比最高的是服务行业（4.50%）。

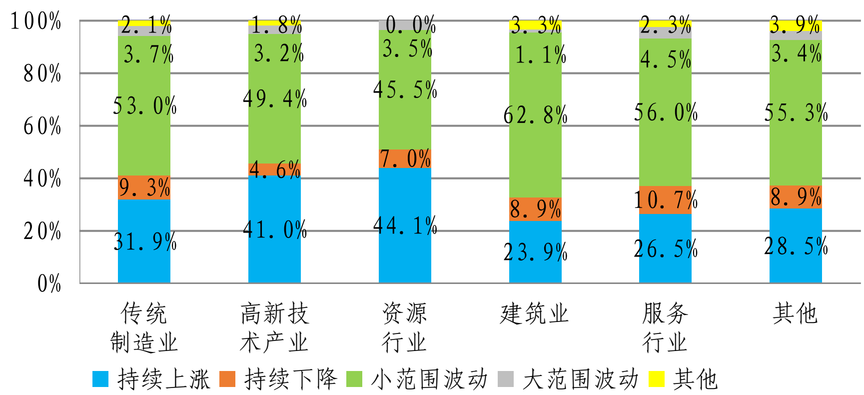

图3-10 不同行业近5年投资收益变动趋势

（四）2019 年企业投资收益状况较 2018 年有所改善

与 2018 年相比，2019 年近五年收益持续上涨的企业占比略有上升，由 2018 年 30.60% 上升至 2019 年的 31.20%，提高了 0.60%；持续下降的企业占比有所下降，由 2018 年的 9.70% 降至 2019 年的 8.60%，下降了 1.10%。在小范围内波动的企业占比与 2018 年持平，均为 54.00%，大范围波动企业占比较 2018 年略有上升（提高了 0.01%）。总体而言，2019 年企业投资收益状况比 2018 年有所改善。

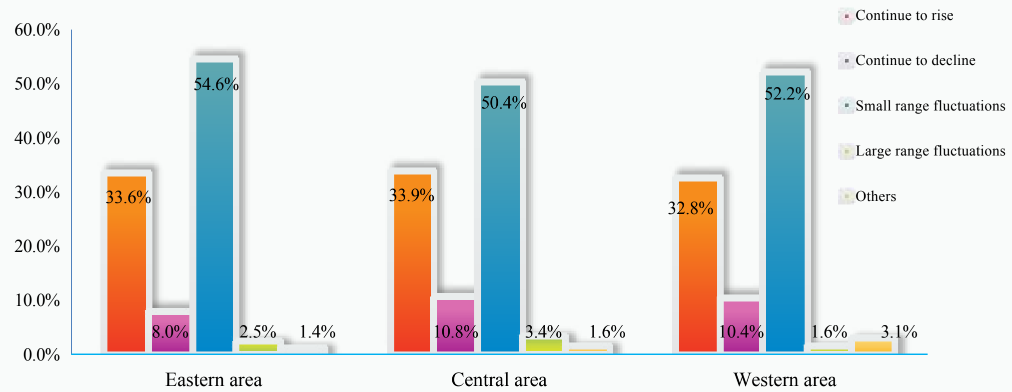

Chart 3-9 Change trend of return on investment in different areas in the past 5 years

(3) The resource industry and high-tech industry have the highest proportions of enterprises whose returns have continued to rise.

In terms of industries, the resource industry and high-tech industry have the highest proportions of enterprises whose returns have continued to rise, which are at 44.10% and 41.00%, respectively, showing a good development trend; the service industry has the highest proportion of enterprises whose returns have continued to decline, which is at 10.70%; the building industry has the highest proportion of enterprises whose returns experience small-range fluctuations, reaching 62.80%; the service industry has the highest proportion of enterprises whose returns experience large-range fluctuations (4.50%).

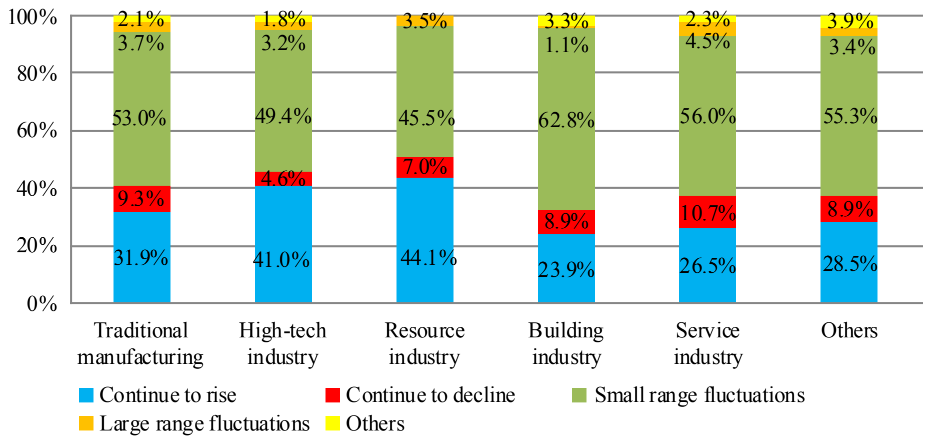

Chart 3-10 Change trend of return on investment in different industries in the past 5 years

(4) The investment return of enterprises in 2019 has improved compared with 2018.

Compared with 2018, the proportion of enterprises whose returns have continued to rise in the past five years has slightly increased in 2019, from 30.60% in 2018 to 31.20% in 2019, an increase of 0.60%; the proportion of enterprises with continuous declines of returns has decreased, from 9.70% in 2018 to 8.60% in 2019, down by 1.10%. The proportion of enterprises with small-scale fluctuations of returns is the same as that in 2018, both of which are at 54.00%, and the proportion with large-scale fluctuations sees a slight increase (up by 0.01%) from 2018. Overall, the investment return of enterprises in 2019 has improved compared to 2018.

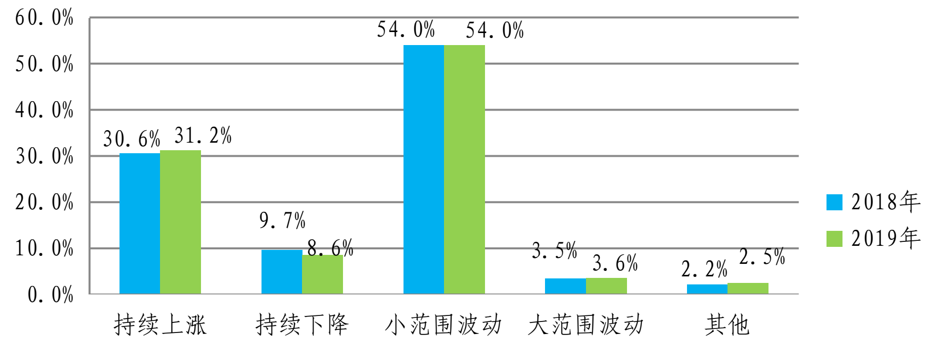

图3-11近五年收益变动情况年度对比图

各地区企业近五年收益涨跌不一。与 2018 年相比，2019 年中部持续上涨的企业占比有所提升，由 2018 年的 28.80% 提至 2019 年的 32.70%；东、中部地区持续下降的企业占比均减少，而西部占比却增加，由 2018 年的 5.50% 增加至 2019 年的 9.30%；中、西部地区小范围波动企业占比下降。

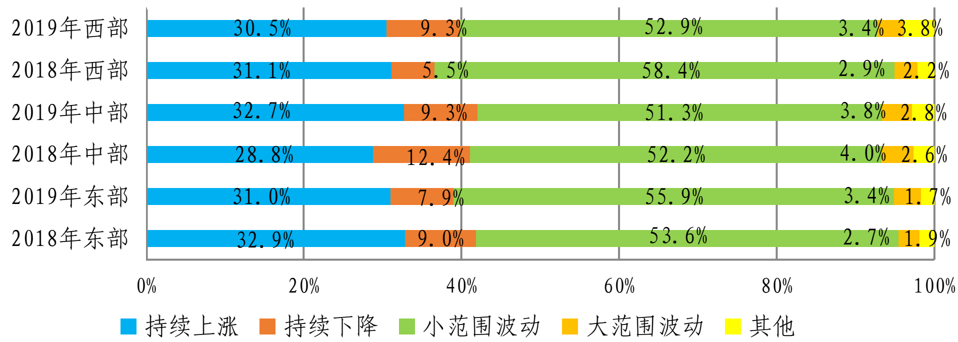

图3-12 不同地区近5年收益变动情况年度对比图

各行业中，近五年收益持续上涨企业占比增加最多的是资源行业，由 2018 年的 28.80% 提至 2019 年的 44.10%，提高了 15.3 个百分点；下降最多的是建筑业，减少了 16.3 个百分点。持续下降企业占比变动不大，调整区间在 -2.70%~0.50% 之间。小范围

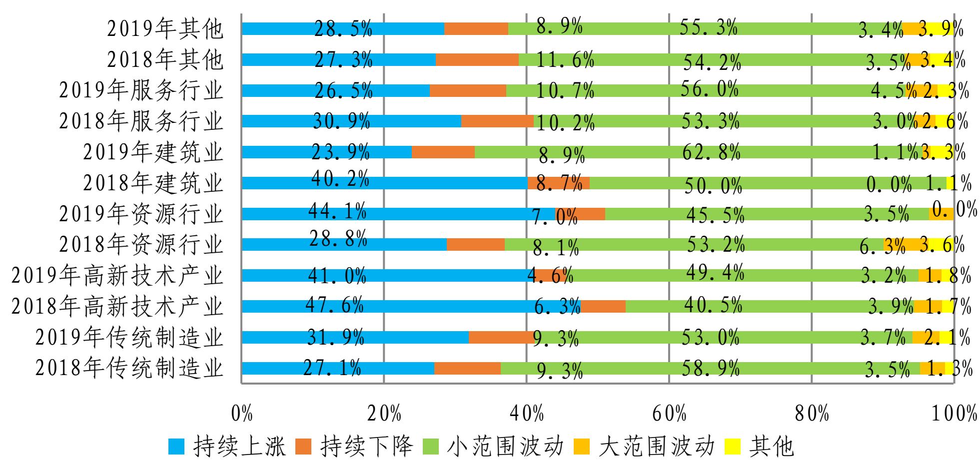

图3-13 不同行业企业近5年收益变动情况年度对比图

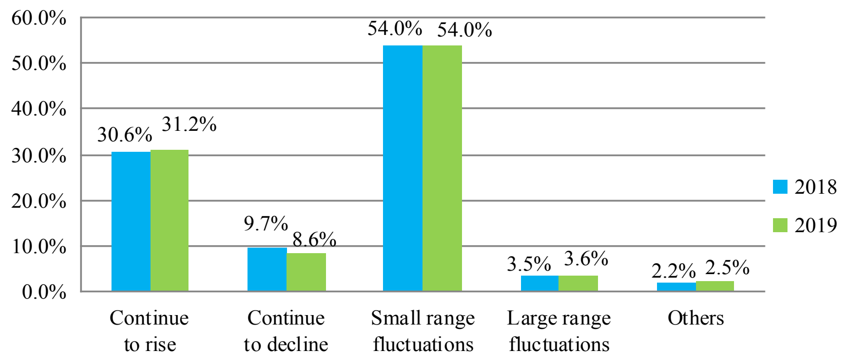

Chart 3-11 Comparison of revenue in the past 5 years on a yearly basis

Returns of enterprises in various areas have seen both increases and decreases in the past five years. Compared with 2018, the proportion of enterprises with continuous rises of returns has increased in the central area in 2019, from 28.80% in 2018 to 32.70% in 2019; the proportion with continuous declines of returns has decreased in both eastern and central areas, while in the west, the proportion has increased, from 5.50% in 2018 to 9.30% in 2019; the proportion with small-scale fluctuations has decreased in both central and western areas.

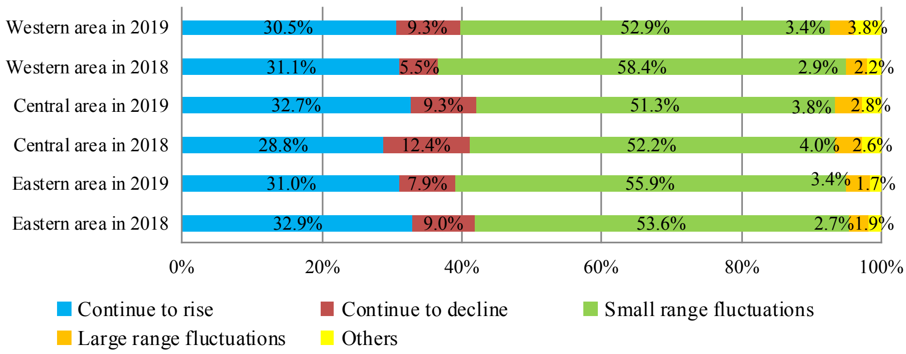

Chart 3-12 Comparison of revenue in different areas in the past 5 years on a yearly basis

Among the various industries, the resource industry sees the biggest increase in the proportion of enterprises with continuous rises of returns in the past five years, from 28.80% in 2018 to 44.10% in 2019, an increase of 15.3 percentage points; the building industry sees the biggest decrease, down by 16.3 percentage points. The proportion with continuous declines has not changed much, with the change between -2.70%

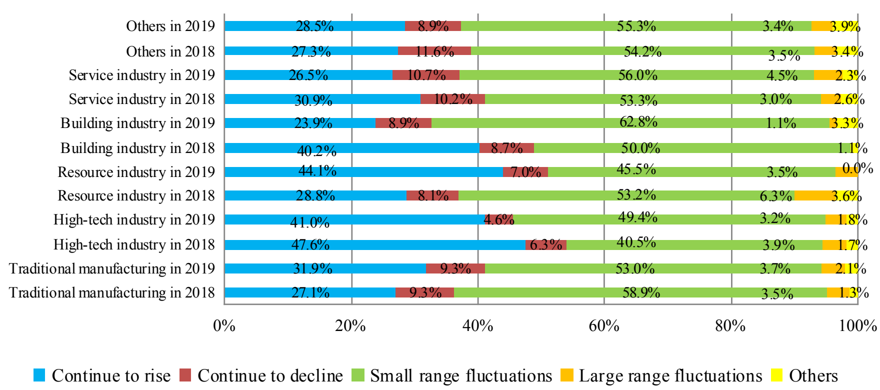

Chart 3-13 Comparison of revenue in different industries in the past 5 years on a yearly basis

波动企业占比变动最大的是建筑业，由 2018 年的 50.00% 提至 2019 年的 62.80%，提高 12.8 个百分点。

三、成本提高和市场竞争激烈问题突出

（一）超七成企业认为成本提高和市场竞争激烈问题最突出

企业认为在生产经营过程中遇到的突出问题是成本提高和市场竞争激烈，占比分别高达 76.90% 和 74.20%。金融支持不够、税费负担过重、政策不稳定等也为企业所关注。

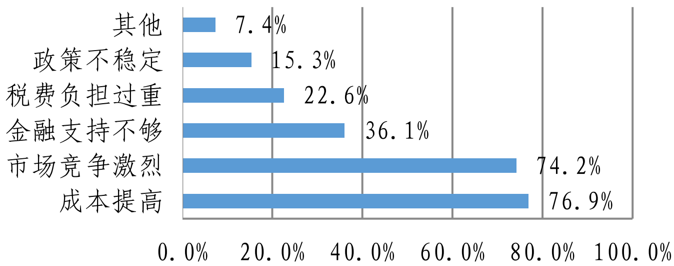

图3-14 目前生产经营过程中遇到的主要问题

各地区关注成本提高问题的企业占比均超七成，其中，中部超八成（81.20%）；关注市场竞争激烈问题的各地区企业也均超七成，东部最高（74.80%）。东、中部企业最关注成本提高问题，西部企业最关注市场竞争激烈问题。此外，各地区企业对金融支持不够问题反映也较多，企业占比均超三成，西部企业占比超四成（44.80%）。

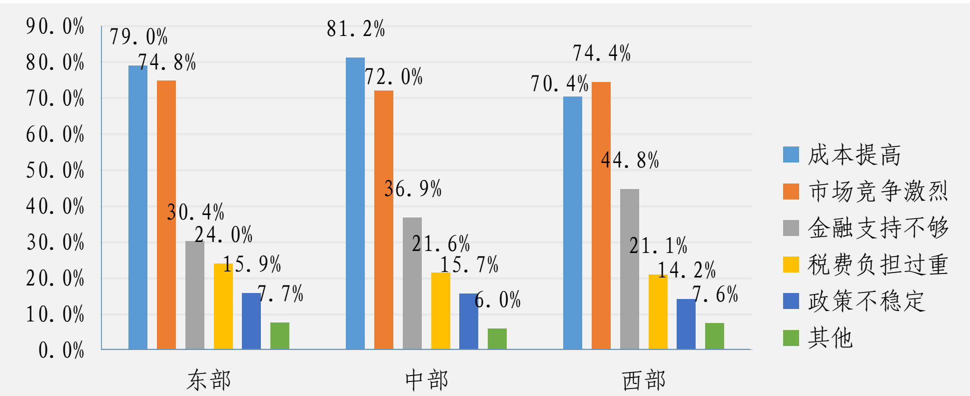

图3-15 不同地区企业生产经营过程中遇到的主要问题

从不同行业角度看，传统制造业、高新技术产业、资源行业和建筑业在生产经营过程中遇到的最主要问题为成本提高（分别占 81.50%、81.20%、69.00% 和 82.30%），服务

and 0.50%. The building industry sees the biggest change in the proportion of enterprises with small-scale fluctuations of returns, from 50.00% in 2018 to 62.80% in 2019, an increase of 12.8 percentage points.

III. Cost increase and fierce market competition problems are prominent

(1) Over 70% of enterprises believe cost increase and fierce market competition are the most prominent problems.

Enterprises believe that the prominent problems in the production and operation process are cost increase and fierce market competition, accounting for 76.90% and 74.20% respectively. Insufficient financial support, excessive taxes and fees, and policy instability are also of concern to enterprises.

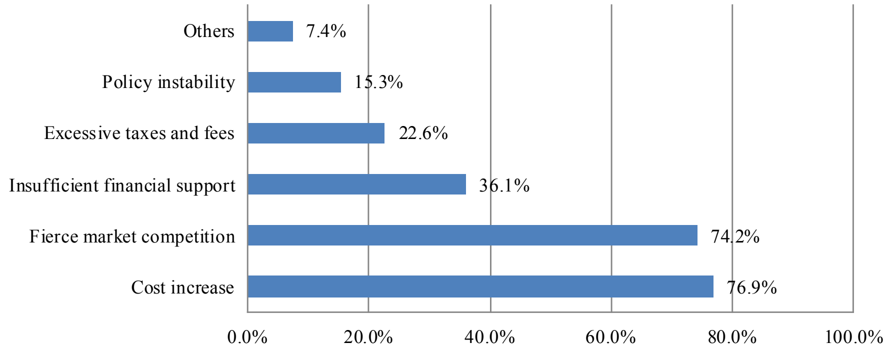

Chart 3-14 Main problems encountered by enterprises in production and operation

The proportion of enterprises paying attention to cost increase is over 70% in all areas, with that in the central area exceeding 80% (81.20%); the proportion of enterprises paying attention to fierce market competition is also over 70% in all areas, with that in the east at the highest (74.80%). Eastern and central area enterprises are most concerned about cost increase, and western area enterprises are most concerned about fierce market competition. In addition, enterprises have reported insufficient financial support, accounting for more than 30% in all areas, with the proportion in the west exceeding 40% (44.80%).

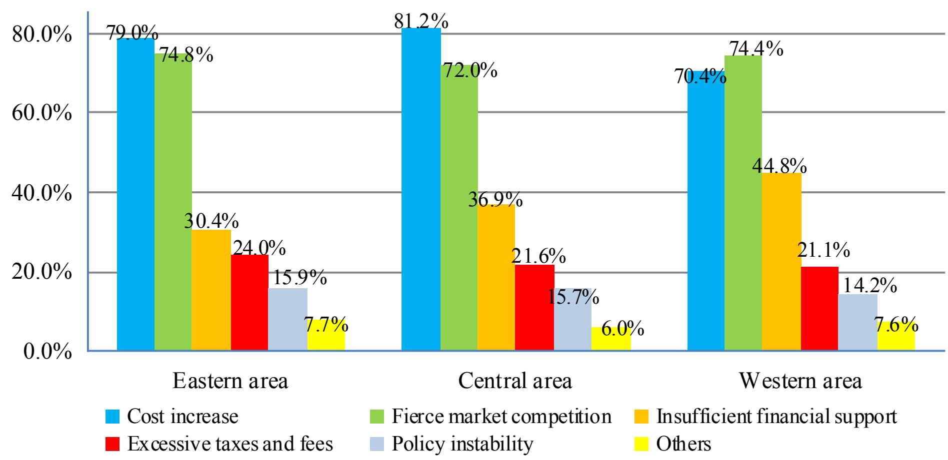

Chart 3-15 Main problems encountered by enterprises in different areas in production and operation

From an industry perspective, the most important problem in the traditional manufacturing, high-tech, resource and building industries in the production and operation process is cost increase (81.50%, 81.20%,

行业和其他行业则是市场竞争激烈（分别占 74.80%、78.20%）。在金融支持不够问题方面，建筑业最为关注（42.50%）；税费负担过重问题上，资源行业最为关注（27.60%）；政策不稳定问题上，服务行业最为关注（19%）。

表 3-1 不同行业生产经营过程中遇到的主要问题

传统制造业	高新技术产业	资源行业	建筑业	服务行业	其他
成本提高81.5%	成本提高81.2%	成本提高69.0%	成本提高82.3%	市场竞争激烈 74.8%	市场竞争激烈 78.2%
市场竞争激烈 73.6%	市场竞争激烈 70.3%	市场竞争激烈 64.8%	市场竞争激烈 68.5%	成本提高74.6%	成本提高72.7%
金融支持不够 34.1%	金融支持不够 40.0%	金融支持不够 36.6%	金融支持不够 42.5%	金融支持不够 38.8%	金融支持不够 32.9%
税费负担过重 26.2%	税费负担过重 24.3%	税费负担过重 27.6%	政策不稳定21.0%	税费负担过重 22.9%	税费负担过重 17.7%
政策不稳定14.1%	政策不稳定9.7%	政策不稳定16.6%	税费负担过重 17.7%	政策不稳定19.0%	政策不稳定16.5%
其他4.8%	其他6.5%	其他9.0%	其他14.9%	其他9.5%	其他8.7%

从不同所有制企业角度看，成本提高是大部分企业面临的最主要问题，其中，外商独资企业占比最高（82.30%）；市场竞争激烈则是集体企业和其他企业的最主要问题（分别为 75.10%、77.10%）；在金融支持不够问题上，大部分企业将其列为第三大问题，其中，合伙企业占比最高（53.20%），但外商独资企业认为税费负担过重是其第三大问题。

表 3-2 不同企业生产经营过程中遇到的主要问题

国有企业	集体企业	私营企业	中外合资合作企业	外商独资企业	合伙企业	其他
成本提高 79.4%	市场竞争激烈 75.1%	成本提高 77.8%	成本提高 73.9%	成本提高 82.3%	成本提高 71.4%	市场竞争激烈 77.1%
市场竞争激烈 73.2%	成本提高 74.7%	市场竞争激烈 74.3%	市场竞争激烈 73.5%	市场竞争激烈 71.4%	市场竞争激烈 70.1%	成本提高 65.1%
金融支持不够 29.1%	金融支持不够 36.2%	金融支持不够 38.1%	金融支持不够 27.5%	税费负担过重 22.6%	金融支持不够 53.2%	金融支持不够 32.9%
税费负担过重 21.6%	税费负担过重 27.9%	税费负担过重 22.7%	税费负担过重 20.4%	金融支持不够 20.7%	政策不稳定 23.4%	税费负担过重 22.9%
政策不稳定 17.3%	政策不稳定 9.2%	政策不稳定 15.7%	政策不稳定 16.6%	政策不稳定 12.0%	税费负担过重 19.5%	政策不稳定 10.4%
其他7.3%	其他8.7%	其他6.8%	其他13.3%	其他8.3%	其他5.2%	其他10.4%

（二）相比 2018 年，2019 年企业最关注市场竞争激烈问题

与 2018 年相比，2019 年企业最为关注的前三大问题为成本提高、市场竞争激烈和金融支持不够。成本提高问题的解决较 2018 年稍有改善，比 2018 年下降了 3.6 个百分点；市场竞争激烈问题也稍有缓和，较去年下降了 2.5 个百分点。同时，企业对金融支持不够问题的关注比例有较大上升幅度，由 2018 年的 29.90% 提至 2019 年的 36.10%，提高 6.2 个百分点。税费负担过重问题也有一定程度缓解，反映比例由 2018 年 27.00% 降至 2019 年的 22.60%，下降了 4.4 个百分点。

69.00% and 82.30%, respectively), and the most important problem in the service and other industries is fierce market competition (74.80% and 78.20% respectively). In terms of insufficient financial support, the building industry is the most concerned (42.50%); the resource industry is most concerned about excessive taxes and fees (27.60%); the service industry is most concerned about policy instability (19%).

Table 3-1 Main problems in production and operation in different industries

Traditional manufacturing	High-tech industry	Resource industry	Building industry	Service industry	Others
Cost increase81.5%	Cost increase81.2%	Cost increase69.0%	Cost increase82.3%	Fierce market competition74.8%	Fierce market competition78.2%
Fierce market competition73.6%	Fierce market competition70.3%	Fierce market competition64.8%	Fierce market competition68.5%	Cost increase74.6%	Cost increase72.7%
Insufficient financial support34.1%	Insufficient financial support40.0%	Insufficient financial support36.6%	Insufficient financial support42.5%	Insufficient financial support38.8%	Insufficient financial support32.9%
Excessive taxes and fees26.2%	Excessive taxes and fees24.3%	Excessive taxes and fees27.6%	Policy instability21.0%	Excessive taxes and fees22.9%	Excessive taxes and fees17.7%
Policy instability14.1%	Policy instability9.7%	Excessive taxes and fees16.6%	Excessive taxes and fees17.7%	Policy instability19.0%	Policy instability16.5%
Others 4.8%	Others 6.5%	Others 9.0%	Others 14.9%	Others 9.5%	Others 8.7%

In different natures of enterprises, cost increase is the most important problem faced by most enterprises, and wholly foreign-owned enterprises account for the highest proportion (82.30%). Fierce market competition is the most important problem for collectively-owned and other enterprises (75.10% and 77.10% respectively). Most enterprises list insufficient financial support as the third largest problem, and partnership enterprises take up the highest proportion (53.20%). However, wholly foreign-owned enterprises consider excessive taxes and fees to be the third largest problem.

Table 3-2 Main problems in production and operation in different enterprises

State-owned enterprises	Collectively-owned enterprises	Private enterprises	Sino-foreign JVs and cooperative enterprises	Wholly foreign-owned enterprises	Partnership enterprises	Others
Cost increase 79.4%	Fierce market competition 75.1%	Cost increase 77.8%	Cost increase 73.9%	Cost increase 82.3%	Cost increase 71.4%	Fierce market competition 77.1%
Fierce market competition 73.2%	Cost increase 74.7%	Fierce market competition 74.3%	Fierce market competition 73.5%	Fierce market competition 71.4%	Fierce market competition 70.1%	Cost increase 65.1%
Insufficient financial support 29.1%	Insufficient financial support 36.2%	Insufficient financial support 38.1%	Insufficient financial support 27.5%	Excessive taxes and fees 22.6%	Insufficient financial support 53.2%	Insufficient financial support 32.9%
Excessive taxes and fees 21.6%	Excessive taxes and fees 27.9%	Excessive taxes and fees 22.7%	Excessive taxes and fees 20.4%	Insufficient financial support 20.7%	Policy instability 23.4%	Excessive taxes and fees 22.9%
Policy instability 17.3%	Policy instability 9.2%	Policy instability 15.7%	Policy instability 16.6%	Policy instability 12.0%	Excessive taxes and fees 19.5%	Policy instability 10.4%
Others 7.3%	Others 8.7%	Others 6.8%	Others 13.3%	Others 8.3%	Others 5.2%	Others 10.4%

(2) Compared with 2018, enterprises are most concerned about fierce market competition in 2019.

Compared with 2018, the top three problems of concern to enterprises in 2019 are cost increase, fierce market competition and insufficient financial support. Cost increase has been slightly mitigated compared to 2018, down by 3.6 percentage points from 2018; fierce market competition is also slightly eased, down by 2.5 percentage points from last year. At the same time, the proportion of enterprises concerned about insufficient financial support has increased significantly, from 29.90% in 2018 to 36.10% in 2019, up by 6.2 percentage points. Excessive taxes and fees are also eased to a certain extent. The proportion of enterprises concerned about this problem has dropped from 27.00% in 2018 to 22.60% in 2019, down by 4.4 percentage points.

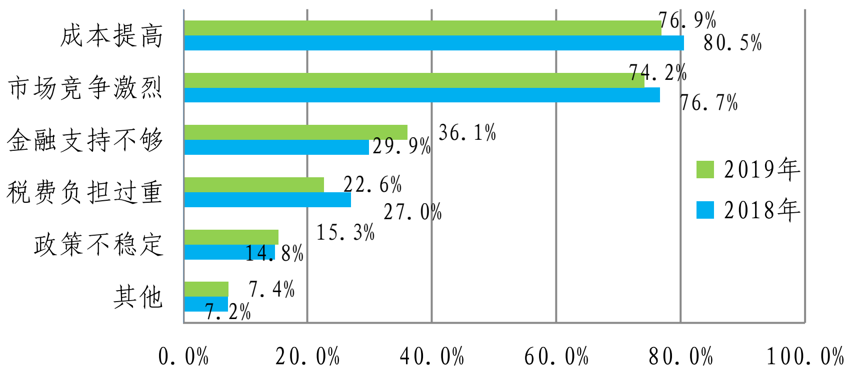

图3-16 企业关注问题年度对比图

四、企业投资最关注开拓市场和利用本地资源

（一）超半数企业投资当地主要考虑更好地开拓市场和利用本地资源

超四成企业在本地区投资主要考虑因素是开拓市场（45.50%）和利用本地资源（42.20%）。超三成企业认为建立生产基地（39.40%）和享受优惠政策（34.40%）也是投资考虑的重要因素。

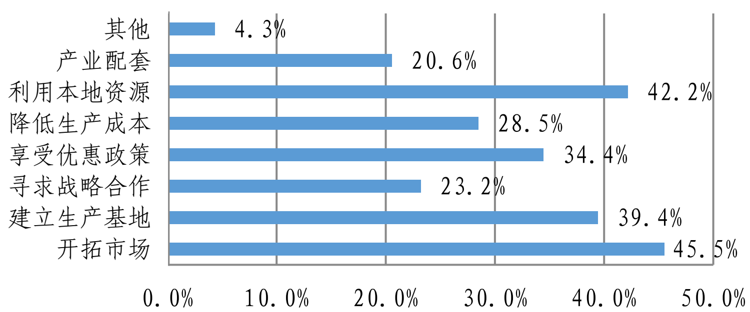

图3-17 企业当初在本地区投资考虑的主要因素

从地区角度看，大多数地区企业在当地投资首要考虑开拓市场和利用本地资源。具体来看，东部地区企业首要考虑开拓市场和享受优惠政策，中部地区企业是利用本地资源和建立生产基地需要，西部地区企业则是更多考虑利用本地资源和开拓市场。

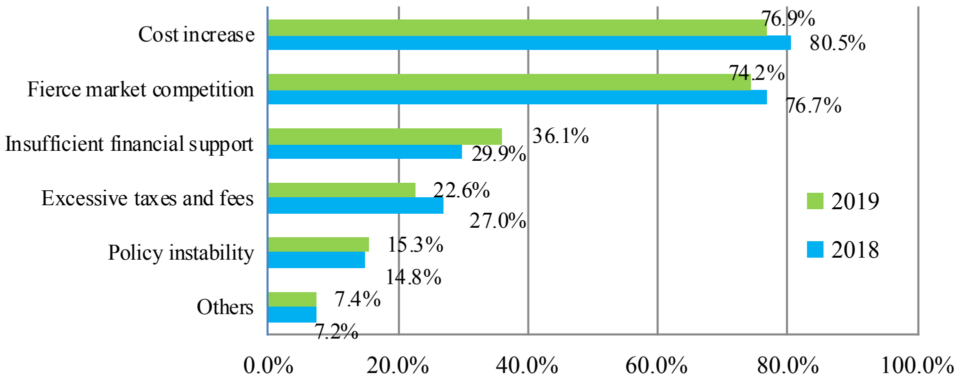

Chart 3-16 Comparison of concerns of enterprises on a yearly basis

IV. Enterprises value market development and use of local resources the most when making an investment

(1) More than half of enterprises mainly consider better market development and use of local resources when investing in a place.

Over 40% of enterprises mainly value market development (45.50%) and use of local resources (42.20%) when investing in a place. Over 30% believe establishing production bases (39.40%) and enjoying preferential policies (34.40%) are also important investment considerations.

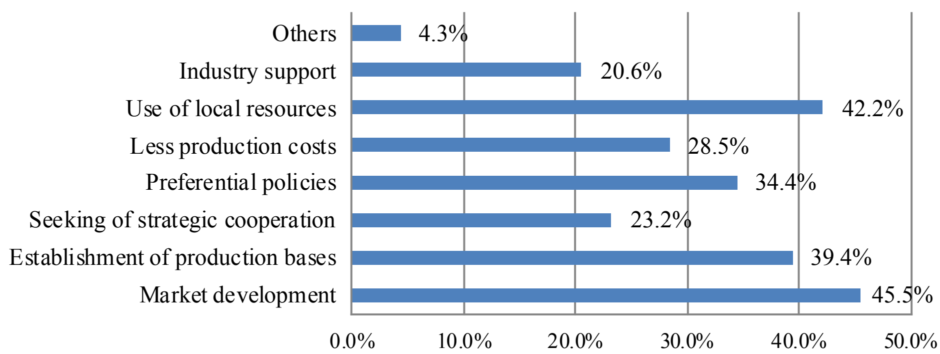

Chart 3-17 Main considerations for enterprises when investing in a place

From a regional perspective, enterprises in most areas prioritize market development and use of local resources when considering investing in a place. Specifically, enterprises in the eastern area first consider market development and preferential policies. Enterprises in the central area prioritize use of local resources and establishment of production bases. Enterprises in the western area value use of local resources and market development.

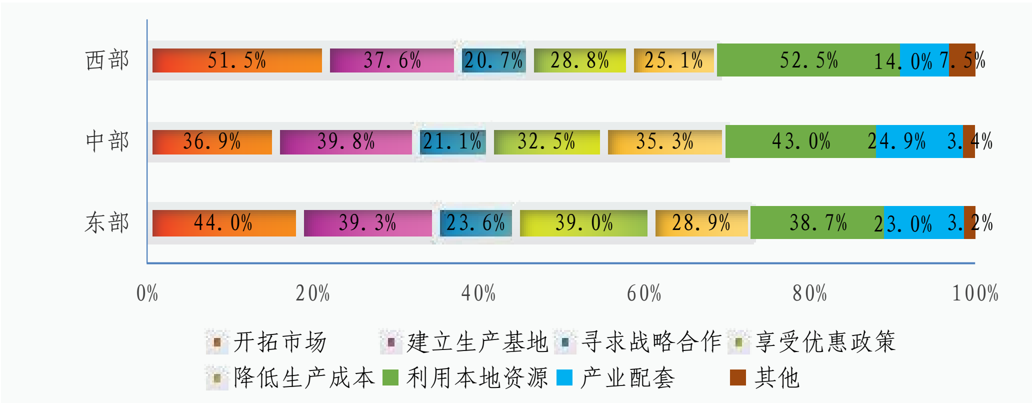

图3-18 不同地区企业投资当地考虑的主要因素

从行业角度看，传统制造业则着重考虑在投资地区建立生产基地（55.10%）；建筑业、服务行业最看重在投资地区开拓市场（66.70%、76.80%）；资源行业最关注利用本地资源（55.90%）；高新技术产业侧重于享受优惠政策（55.30%）。

表 3-3 不同行业企业在本地区投资考虑的因素

传统制造业	高新技术产业	资源行业	建筑业	服务行业	其他
建立生产基地 55.1%	享受优惠政策 55.3%	利用本地资源 55.9%	开拓市场66.7%	开拓市场76.8%	开拓市场57.4%
利用本地资源 48.6%	开拓市场49.5%	开拓市场50.0%	利用本地资源 42.9%	利用本地资源 58.4%	利用本地资源 51.9%
开拓市场42.4%	建立生产基地 41.7%	建立生产基地 44.1%	寻求战略合作 35.7%	寻求战略合作 36.0%	降低生产成本 32.9%
降低生产成本 40.8%	降低生产成本 38.8%	享受优惠政策 26.5%	建立生产基地 28.6%	享受优惠政策 25.2%	享受优惠政策 32.6%
产业配套25.3%	寻求战略合作 37.9%	寻求战略合作 26.5%	享受优惠政策 23.8%	产业配套14.4%	建立生产基地 31.9%
享受优惠政策 22.4%	利用本地资源 30.1%	降低生产成本 17.6%	降低生产成本 21.4%	降低生产成本 14.0%	寻求战略合作 20.3%
寻求战略合作 20.0%	产业配套20.4%	产业配套14.7%	其他2.4%	建立生产基地 10.4%	产业配套19.7%
其他3.3%	其他2.9%	其他5.9%	产业配套0.0%	其他8.8%	其他8.4%

从所有制角度看，国有企业、集体企业、私营企业、合伙企业和其他类型企业着重考虑开拓市场（44.70%、69.50%、55.90%、80.60%、76.10%），中外合资、合作企业最为看重在当地建立生产基地（47.10%），外商独资企业最为关注降低生产成本（71.0%）。

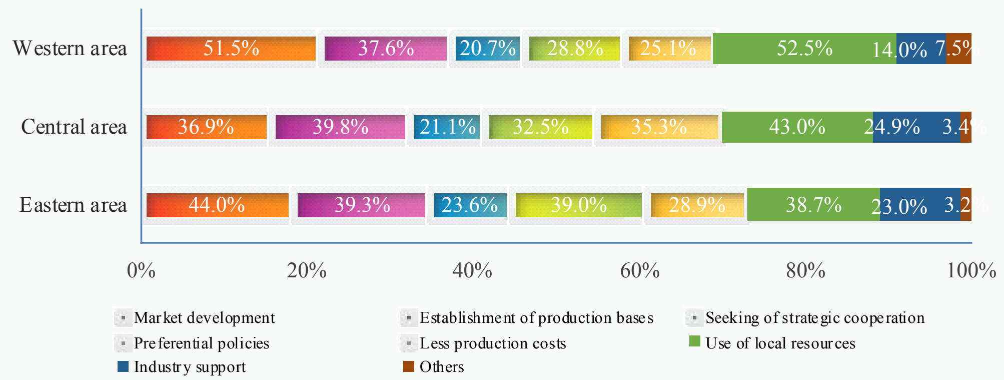

Chart 3-18 Main considerations for enterprises when investing in a place in different areas

From an industry perspective, traditional manufacturing industry focuses on establishing production bases in the investment destinations (55.10%); building and service industries value market development the most (66.70% and 76.80% respectively); resource industry is most concerned about using local resources (55.90%); high-tech industry focuses on preferential policies (55.30%).

Table 3-3 Considerations for enterprises in different industries when investing in a place

Traditional manufacturing	High-tech industry	Resource industry	Building industry	Service industry	Others
Establishment of production bases 55.1%	Preferential policies 55.3%	Use of local resources 55.9%	Market development 66.7%	Market development 76.8%	Market development 57.4%
Use of local resources 48.6%	Market development 49.5%	Market development 50.0%	Use of local resources 42.9%	Use of local resources 58.4%	Use of local resources 51.9%
Market development 42.4%	Establishment of production bases 41.7%	Establishment of production bases 44.1%	Seeking of strategic cooperation 35.7%	Seeking of strategic cooperation 36.0%	Less production costs 32.9%
Less production costs 40.8%	Less production costs 38.8%	Preferential policies 26.5%	Establishment of production bases 28.6%	Preferential policies 25.2%	Preferential policies 32.6%
Industry support 25.3%	Seeking of strategic cooperation 37.9%	Seeking of strategic cooperation 26.5%	Preferential policies 23.8%	Industry support 14.4%	Establishment of production bases 31.9%
Preferential policies 22.4%	Use of local resources 30.1%	Less production costs 17.6%	Less production costs 21.4%	Less production costs 14.0%	Seeking of strategic cooperation 20.3%
Seeking of strategic cooperation 20.0%	Industry support 20.4%	Industry support 14.7%	Others 2.4%	Establishment of production bases 10.4%	Industry support 19.7%
Others 3.3%	Others2.9%	Others5.9%	Industry support0.0%	Others8.8%	Others8.4%

In enterprises of different natures, state-owned, collectively-owned, private, partnership and other types of enterprises focus on market development (44.70%, 69.50%, 55.90%, 80.60% and 76.10%, respectively). Sino-foreign JVs and cooperative enterprises are most concerned about establishing production bases (47.10%). Wholly foreign-owned enterprises are most concerned about reducing production costs (71.0%).

表 3-4 不同所有制企业在本地区投资考虑的因素

国有企业	集体企业	私营企业	中外合资、合作企业	外商独资企业	合伙企业	其他
开拓市场 44.7%	开拓市场 69.5%	开拓市场 55.9%	建立生产基地47.1%	降低生产成本71.0%	开拓市场 80.6%	开拓市场 76.1%
利用本地资源40.0%	寻求战略合作49.5%	利用本地资源52.9%	利用本地资源47.1%	建立生产基地51.6%	利用本地资源50.0%	利用本地资源52.3%
享受优惠政策38.8%	降低生产成本49.5%	建立生产基地33.8%	开拓市场 41.2%	享受优惠政策45.2%	降低生产成本36.1%	建立生产基地31.8%
建立生产基地30.6%	利用本地资源45.3%	享受优惠政策29.2%	降低生产成本35.3%	利用本地资源35.5%	寻求战略合作22.2%	享受优惠政策21.6%
降低生产成本25.9%	产业配套 35.8%	寻求战略合作27.5%	享受优惠政策23.5%	开拓市场 29.0%	享受优惠政策22.2%	降低生产成本15.9%
产业配套 23.5%	享受优惠政策33.7%	降低生产成本26.5%	产业配套 23.5%	寻求战略合作12.9%	建立生产基地19.4%	产业配套 14.8%
寻求战略合作22.4%	建立生产基地32.6%	产业配套 17.4%	寻求战略合作17.6%	产业配套 9.7%	其他13.9%	寻求战略合作11.4%
其他10.6%	其他12.6%	其他4.3%	其他0.0%	其他9.7%	产业配套 5.6%	其他6.8%

（二）自己考察后选定和政府招商引资成主要投资方式

超五成企业在本地投资的主要方式为自己考察后选定（55.30%），超三成企业看中当地政府招商引资（39.40%），26.80%的企业通过在已有项目基础上投资新项目进行投资，23.40%的企业是受同行业或关联行业带动，第三方推荐企业占比为16.50%。

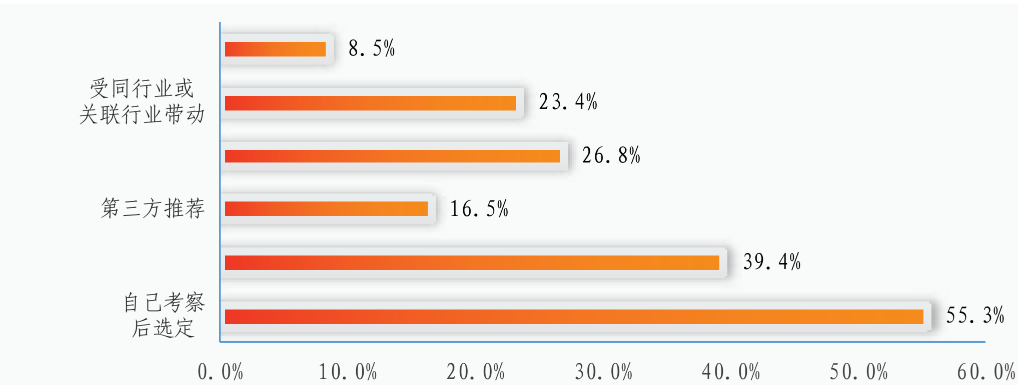

图3-19 企业是通过何种方式来本地区投资的

私营企业、合伙企业和国有企业在本地区投资最常选择的方式均为自己考察后选定（分别为59.90%、50%、39.20%）。外商独资企业、合伙企业、中外合资、合作企业和集体企业最常选择的方式是被当地政府招商引资（分别为52.70%、50%、48.50%、41.40%）。对于第三方推荐的方式，集体企业占比最高（30.80%）；在已有项目基础上

Table 3-4 Considerations for enterprises of different natures when investing in a place

State-owned enterprises	Collectively-owned enterprises	Private enterprises	Sino-foreign JVs and cooperative enterprises	Wholly foreign-owned enterprises	Partnership enterprises	Others
Market development 44.7%	Market development 69.5%	Market development 5.9%	Establishment of production bases 47.1%	Less production costs 71.0%	Market development 80.6%	Market development 76.1%
Use of local resources 40.0%	Seeking of strategic cooperation 49.5%	Use of local resources 52.9%	Use of local resources 47.1%	Establishment of production bases 51.6%	Use of local resources 50.0%	Use of local resources 52.3%
Preferential policies 38.8%	Less production costs 49.5%	Establishment of production bases 33.8%	Market development 41.2%	Preferential policies 45.2%	Less production costs36.1%	Establishment of production bases 31.8%
Establishment of production bases 30.6%	Use of local resources 45.3%	Preferential policies 29.2%	Less production costs 35.3%	Use of local resources 35.5%	Seeking of strategic cooperation 22.2%	Preferential policies 21.6%
Less production costs 25.9%	Industry support 35.8%	Seeking of strategic cooperation 27.5%	Preferential policies 23.5%	Market development 29.0%	Preferential policies 22.2%	Less production costs 15.9%
Industry support 23.5%	Preferential policies33.7%	Less production costs 26.5%	Industry support 23.5%	Seeking of strategic cooperation 12.9%	Establishment of production bases 19.4%	Industry support 14.8%
Seeking of strategic cooperation 22.4%	Establishment of production bases 32.6%	Industry support 17.4%	Seeking of strategic cooperation 17.6%	Industry support 9.7%	Others 13.9%	Seeking of strategic cooperation 11.4%
Others 10.6%	Others 12.6%	Others 4.3%	Others 0.0%	Others 9.7%	Industry support 5.6%	Others 6.8%

(2) Independent inspection and selection and government promotion of investment become main channels of investment.

Over 50% (55.30%) of enterprises invest in a place based on independent inspection and selection. Over 30% (39.40%) of enterprises are attracted by government promotion of investment. 26.80% of enterprises invest in new projects based on existing projects. 23.40% are driven by the same industry or related industries, and 16.50% follow third-party recommendations.

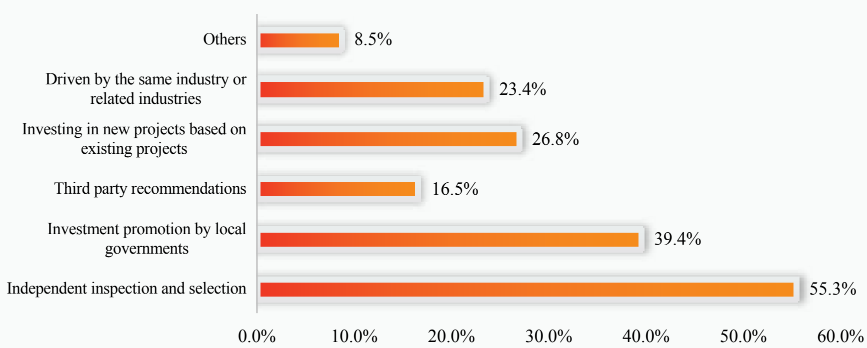

Chart 3-19 Channels for enterprises to invest in a place

The most common choice of private, partnership and state-owned enterprises is independent inspection and selection (59.90%, 50% and 39.20%, respectively). The most common choice of wholly foreign-owned, partnership, Sino-foreign JVs and cooperative enterprises and collectively-owned enterprises is investment promotion by local governments (52.70%, 50%, 48.50% and 41.40%, respectively). For third-party

投资新项目方面，国有企业占比最高（32.30%）；在受同行业或关联行业带动方面，私营企业选择比重最高（24.80%）。

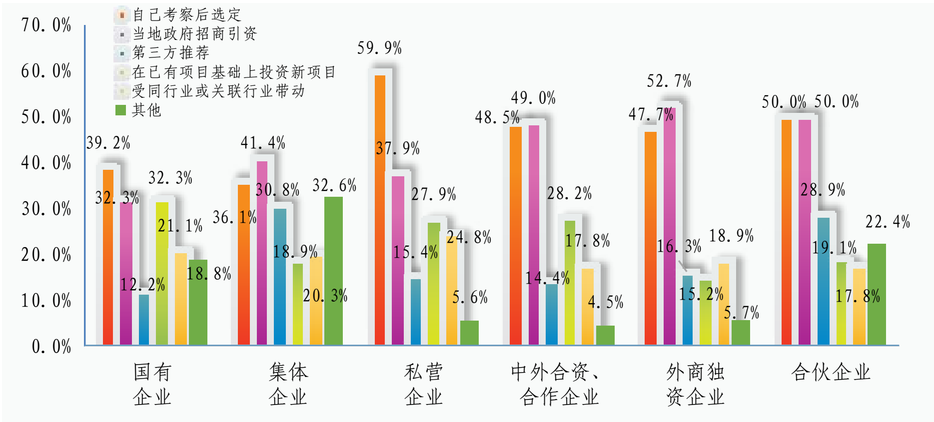

图3-20 不同所有制企业来当地投资的渠道

五、个人投资者为企业接受投资主要来源

（一）个人投资者为企业接受投资的主要来源

在已经接受其他投资的企业中，53.50%的企业反映其主要来源为个人投资者，国内企业（39.20%）和政府扶持（31.30%）占比次之，部分企业还接受来自国外企业的投资（15.00%），极少数企业接受基金公司、其他股东等投资。

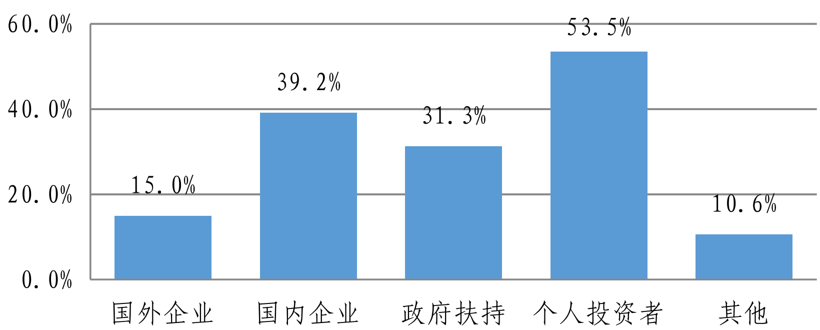

图3-21 企业接受投资的一般来源

从行业角度分析，各行业接受投资前两位来源分别是个人投资者、国内企业。其中，建筑业投资来源于个人投资者的比重最高（61.80%），资源行业中国内企业投资比重最高（65.70%）；各行业中，政府扶持均为第三大投资来源，资源行业比重最高（35.80%）。服务行业接受来自国外企业的投资比重最高（19.50%）。

recommendations, collectively-owned enterprises account for the highest proportion (30.80%); state-owned enterprises account for the highest proportion (32.30%) in investing in new projects based on existing projects; private enterprises take up the highest proportion (24.80%) in being driven by the same industry or related industries.

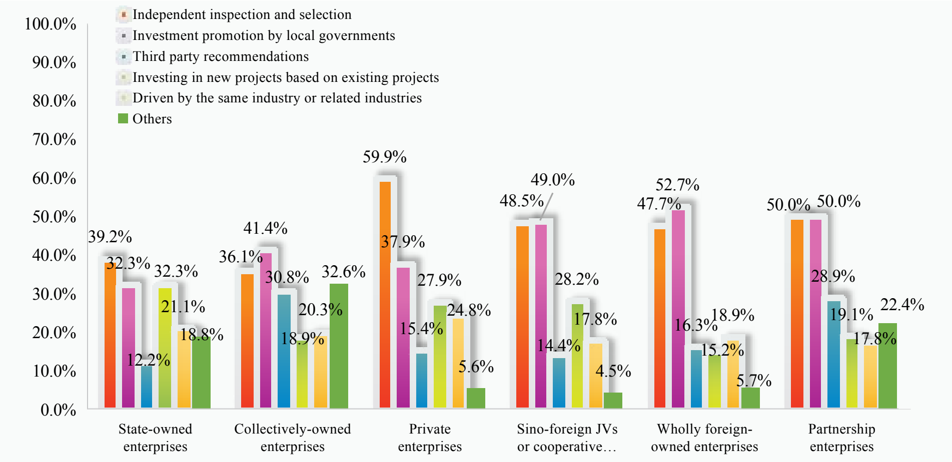

Chart 3-20 Channels for enterprises of different natures to invest in a place

V. Individual investors are the main source of investment accepted by enterprises

(1) Individual investors are the main source of investment accepted by enterprises

Among enterprises that have already accepted other investments, 53.50% of the enterprises report that their main source is individual investors, followed by domestic enterprises (39.20%) and government support (31.30%), and some enterprises also accept investment from foreign businesses (15.00%). A very few enterprises accept investment from fund companies and other shareholders.

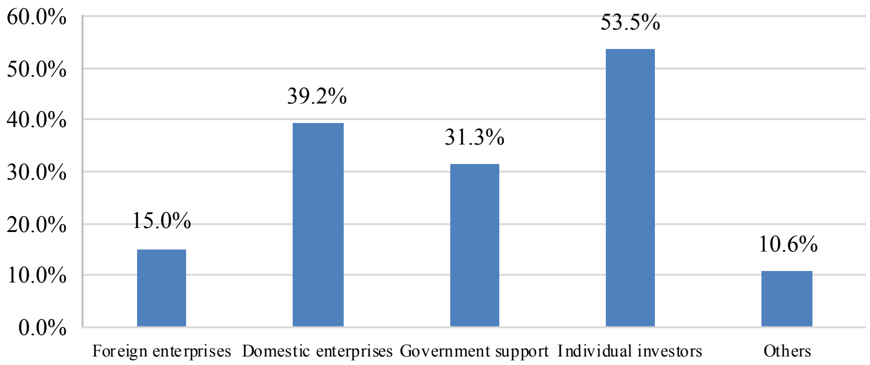

Chart 3-21 General sources of investment received by enterprises

From an industry perspective, the top two sources of investment in various industries are individual investors and domestic enterprises. The building industry accepts the highest proportion of investment from individual investors (61.80%), and the resource industry accepts the highest proportion of investment from domestic enterprises (65.70%). Among all industries, government support is the third largest source of investment, and takes up the highest proportion in the resource industry (35.80%). The service industry accepts the highest proportion of investment from foreign companies (19.50%).

表 3-5 不同行业企业接受投资的来源

传统制造业	高新技术产业	资源行业	建筑业	服务行业	其他
个人投资者54.0%	国内企业50.1%	国内企业65.7%	个人投资者61.8%	个人投资者53.6%	个人投资者56.9%
国内企业35.2%	个人投资者44.0%	个人投资者58.2%	国内企业34.2%	国内企业42.9%	国内企业32.7%
政府扶持32.9%	政府扶持35.0%	政府扶持35.8%	政府扶持23.7%	政府扶持30.9%	政府扶持28.4%
国外企业15.4%	国外企业15.1%	其他10.4%	国外企业18.4%	国外企业19.5%	其他14.1%
其他9.7%	其他9.2%	国外企业9.0%	其他5.3%	其他9.0%	国外企业11.9%

（二）公司实力是被投资的主要因素

在接受其他投资的企业中，大多数企业认为投资方投资的主要原因是公司实力（64.70%），技术研发次之（40.90%）。品牌知名度（39.50%）和营销模式（34.90%）也是很多企业认为被投资方选中的原因。此外，部分投资者也将企业发展前景、营销渠道作为投资重要因素。

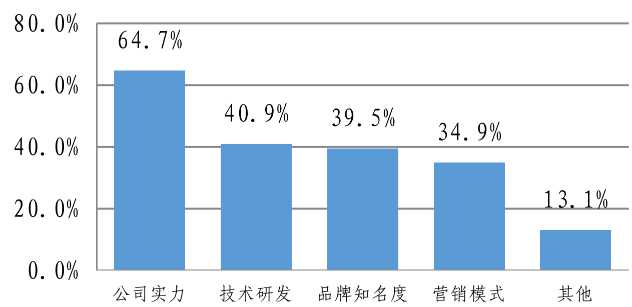

图3-22 企业认为被投资方选中的原因

大部分行业企业认为被投资方投资的原因为公司实力，其中，建筑业企业占比最高（72.40%），传统制造业次之（70.40%）。资源行业认为营销模式是被投资的最主要原因（51.50%），高新技术产业认为被投资主要原因是技术研发的占比最高（63.70%），建筑业认为被投资主要原因是品牌知名度的占比最高（53.90%）。

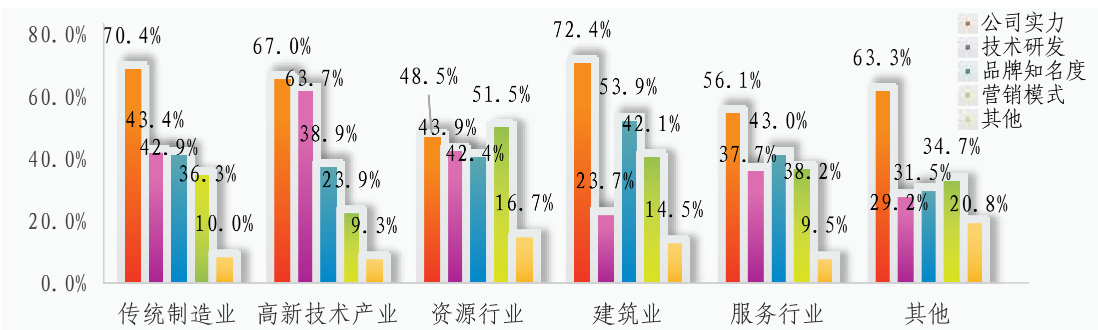

图3-23 不同行业对于被投资方选中的看法

Table 3-5 Sources of investment accepted by enterprises in different industries

Traditional manufacturing	High-tech industry	Resource industry	Building industry	Service industry	Others
Individual investors54.0%	Domestic enterprises50.1%	Domestic enterprises65.7%	Individual investors 61.8%	Individual investors 53.6%	Individual investors 56.9%
Domestic enterprises35.2%	Individual investors44.0%	Individual investors58.2%	Domestic enterprises34.2%	Domestic enterprises42.9%	Domestic enterprises 32.7%
Government support32.9%	Government support35.0%	Government support35.8%	Government support23.7%	Government support30.9%	Government support 28.4%
Foreign enterprises15.4%	Foreign enterprises15.1%	Others10.4%	Foreign enterprises18.4%	Foreign enterprises19.5%	Others14.1%
Others9.7%	Others9.2%	Foreign enterprises9.0%	Others5.3%	Others9.0%	Foreign enterprises 11.9%

(2) Company strength is the main factor in being invested in

Among enterprises that accept other investments, most of them believe the main reason behind investors' choices is company strength (64.70%), followed by technology R&D (40.90%). Brand awareness (39.50%) and marketing model (34.90%) are also reasons many enterprises believe for being chosen by investors. In addition, some investors also regard development prospects and marketing channels as important factors in investment.

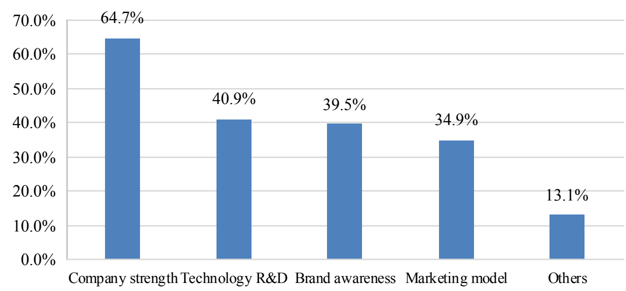

Chart 3-22 Reasons why investors choose a certain enterprise

Enterprises in most industries believe company strength is the reason why investors choose them. The building industry has the highest proportion of enterprises (72.40%), followed by the traditional manufacturing industry (70.40%). The resource industry believes marketing model is the most important reason for being chosen by investors (51.50%). The high-tech industry has the highest proportion of enterprises who believe the main reason is technology R&D (63.70%). The building industry has the highest proportion of enterprises who believe the main reason is brand awareness (53.90%).

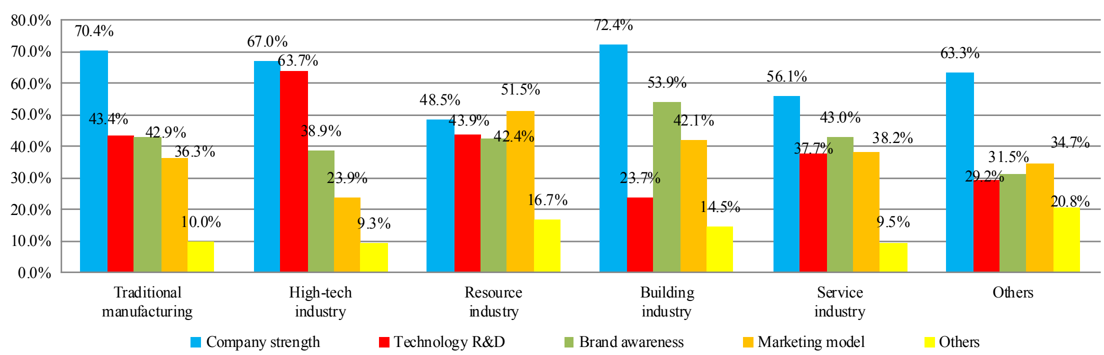

Chart 3-23 Opinions of enterprises in different industries about reasons why investors choose them

六、公司所在地为企业再投资首选地点

（一）五分之一的企业有外部投资项目，公司所在地为投资首选地点

在已有再投资的企业中，就投资地点而言，68.30%企业选择公司所在地，26%企业选择东部，国外占比22.90%。

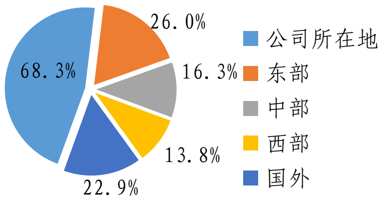

图3-24企业再投资地点的选择

各个地区企业均以公司所在地为再投资首选地点，其中，西部企业占比最高为78.10%；东部企业选择在东部进行投资占比为33.90%；中部企业选择中部比例为23.80%；西部企业选择西部投资占比最高为16.00%；东部企业选择国外比例为26.20%。

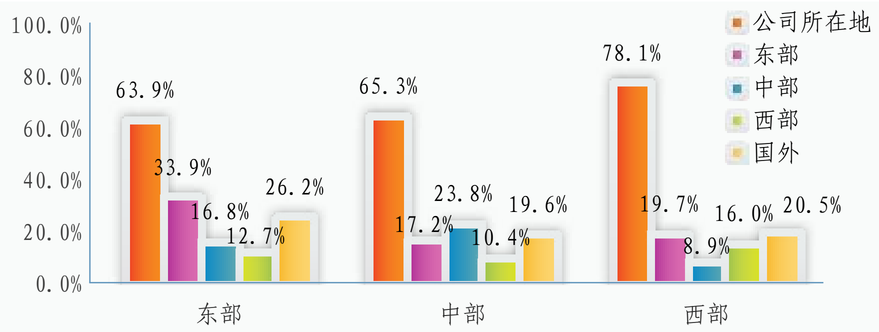

图3-25 不同地区企业选择投资的地点

（二）市场规模成选择投资地点的主要考虑因素

大多数企业选择投资地点的主要因素是看重当地的市场规模（58.40%），其次是政府重视（43.40%）及技术和品牌（38.60%）。同时，也有不少企业以营销渠道（33.80%）和能源资源（30.40%）作为选择投资地点时考虑的主要因素。

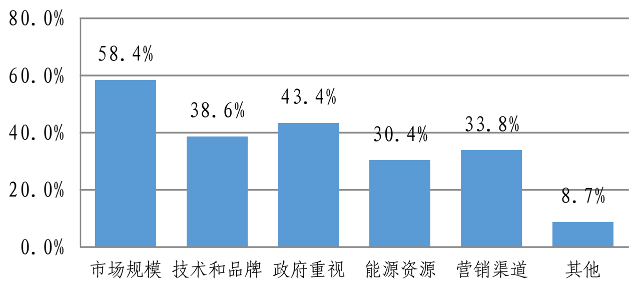

图3-26 选择投资地点的原因

VI. Company location is the first destination choice of enterprises for reinvestment

(1) 1/5 of enterprises have external investment projects, and company location is the first destination choice for investment.

Among enterprises that have already reinvested, 68.30% of the enterprises choose the location of the company, 26% choose the east, and 22.90% choose foreign countries.

Enterprises in each area regard company location as the preferred destination for reinvestment. The western area enterprises account for the highest proportion of 78.10%; the eastern area enterprises that choose to reinvest in the east account for 33.90%; the central area enterprises that choose to reinvest in the central area account for 23.80%. The proportion of enterprises choosing to reinvest in the west is the highest in the western area, at 16.00%; the proportion of eastern area enterprises choosing to reinvest in foreign countries is 26.20%.

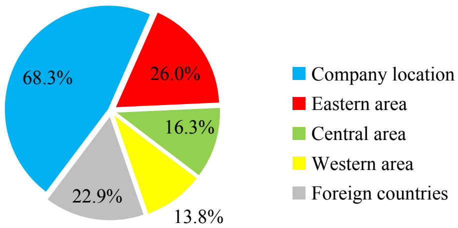

Chart 3-24 Destination choices of enterprises for reinvestment

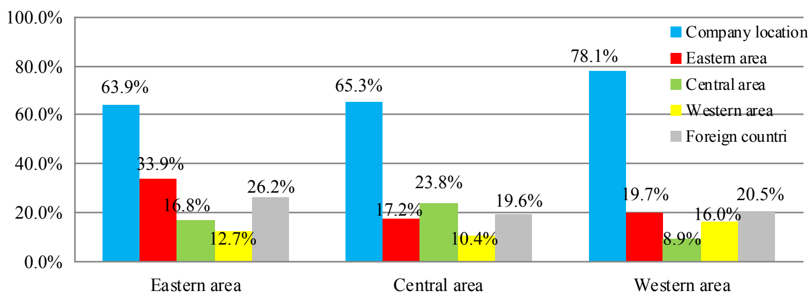

Chart 3-25 Destination choices of enterprises in different areas for investment

(2) Market size becomes the main consideration for choosing investment destinations.

Most enterprises mainly value the local market size (58.40%) when choosing their investment destinations, followed by government emphasis (43.40%) and technology and brand (38.60%). At the same time, many enterprises mainly consider marketing channels (33.80%) and energy resources (30.40%) when choosing investment destinations.

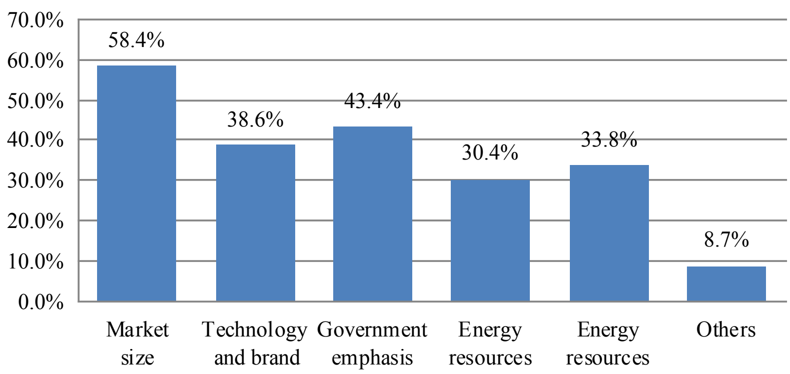

Chart 3-26 Reasons for investment destination choices

从行业角度看，各行业均十分重视市场规模，企业占比均超五成，其中，建筑业占比最高（73.00%）。就技术和品牌而言，高新技术产业比例最高（47.20%），服务行业次之（43.50%）；就政府重视和能源资源而言，资源行业最为关注（分别为47.40%、48.70%）；就营销渠道而言，建筑业最关注（43.00%），服务行业次之（38.40%）。

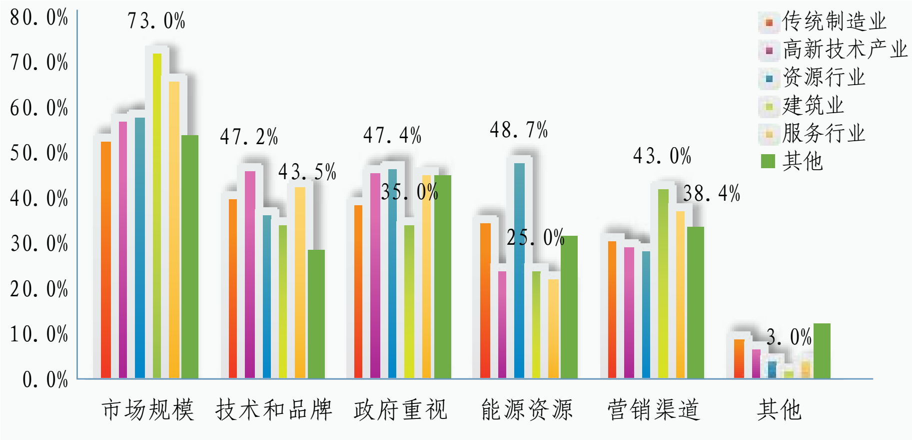

图3-27 不同行业选择投资地点的原因

七、进一步开放市场是中国最重要商业机会

（一）45% 的企业认为进一步开放市场是最重要的商业机会

受访企业认为中国最重要的商业机是进一步开放市场，占比最高为40.00%；数字技术，包括电子商务和互联网及中国消费增长和中产阶级扩大次之，分别为37.90%、37.60%；日益增长的对外国品牌和高质量产品的需求占比第三，为27.00%。

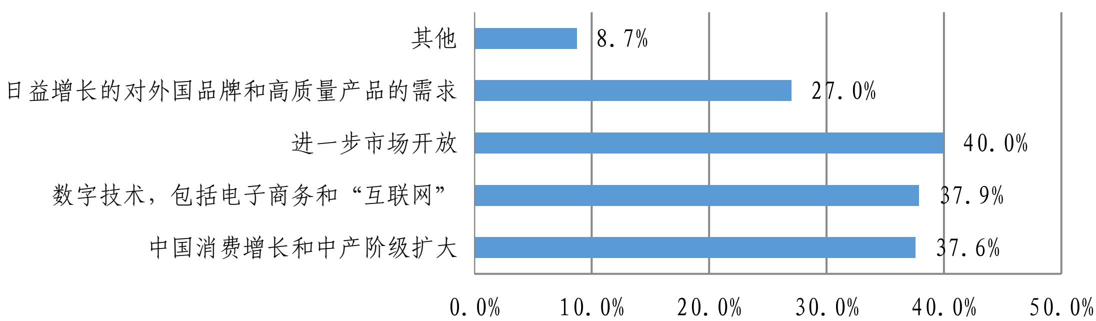

图3-28 您认为中国最重要的商业机会是什么

From an industry perspective, all industries pay great attention to market size, and the proportion of enterprises exceeds 50% in all industries. The building industry has the highest proportion (73.00%). In terms of technology and brand, the high-tech industry has the highest proportion (47.20%), followed by the service industry (43.50%); in terms of government emphasis and energy resources, the resource industry is the most concerned (47.40% and 48.70% respectively); in terms of marketing channels, the building industry is the most concerned (43.00%), followed by the service industry (38.40%).

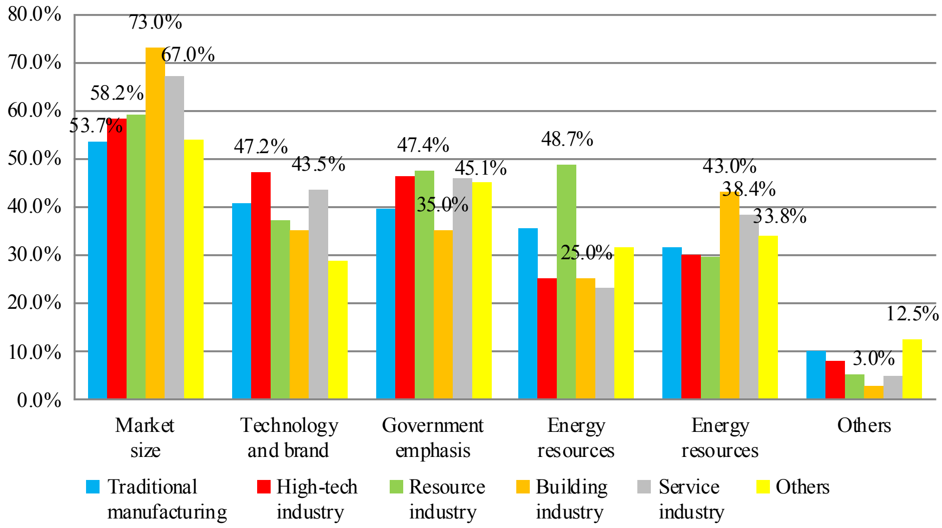

Chart 3-27 Reasons for investment destination choices in different industries

VII. Further opening up of the market is the most important business opportunity in China

(1) 45% of enterprises believe further opening up the market is the most important business opportunity.

The surveyed enterprises believe China's most important business opportunity is the further opening up of the market, and the proportion of enterprises believing so account for the highest proportion of 40.00%, which is followed by digital technologies, including e-commerce and the Internet, and growth of consumption and middle class in China, respectively at 37.90% and 37.60%. Increasing need for foreign-brand and high-quality products ranks third, at 27.00%.

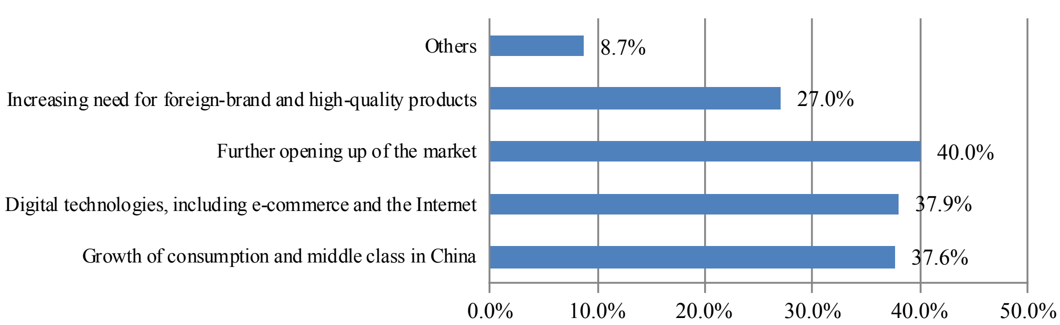

Chart 3-28 What is the most important business opportunity in China

（二）各地区企业对最重要的商业机会理解不一

各地区企业对最重要的商业机会理解不一。东部企业认为中国消费增长和中产阶级扩大是中国最重要的商业机会（47.30%），其次为数字技术，包括电子商务和互联网（45.70%）；中、西部受访企业均认为进一步开放市场是中国最重要的商业机会，其中，西部占比最高（42.40%），此外，中部地区企业认为中国消费增长和中产阶级扩大也是中国最重要的商业机会之一。

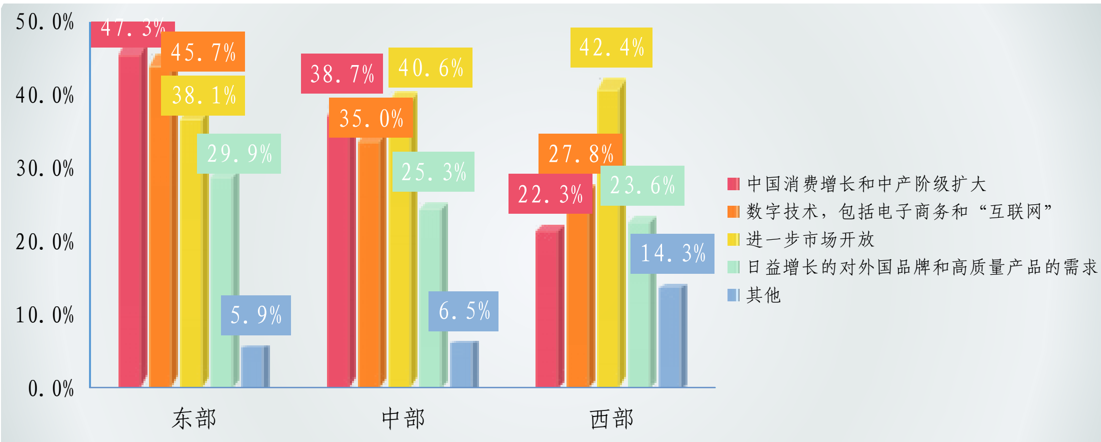

图3-29 不同地区企业对重要商业机会的看法

(2) Enterprises in different areas have different understandings of the most important business opportunity.

Enterprises in different areas have different understandings of the most important business opportunity. Eastern area enterprises believe growth of consumption and middle class in China is the most important business opportunity (47.30%), followed by digital technologies, including e-commerce and the Internet (45.70%). Central and western area enterprises believe further opening up of the market is the most important business opportunity, with the western area has the highest proportion of enterprises thinking so (42.40%). In addition, central area enterprises believe growth of consumption and middle class in China is also one of the most important business opportunities in China.

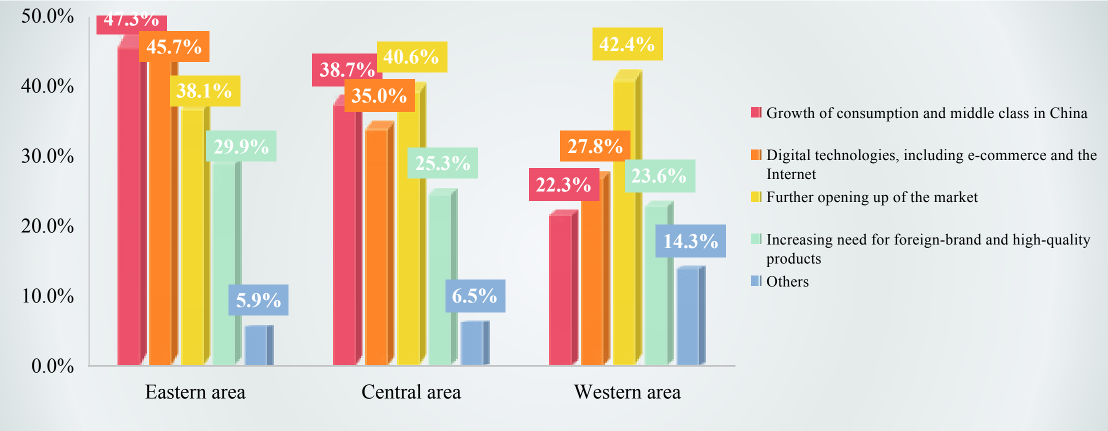

Chart 3-29 Opinion of enterprises in different areas about important business opportunities

第四章 中国营商环境建设成就

近年来，党中央、国务院出台系列优化营商环境的措施，各地区各部门认真贯彻落实国家战略部署，进一步深化改革，扩大市场开放，有效激发了市场活力和社会创造力，有力促进了营商环境不断优化。

一、政策政务环境持续优化

2019年以来，我国通过出台一系列旨在优化营商环境的政策法规，全面深化“放管服”改革，为经济高质量发展注入了新动力。根据中国贸促会问卷调查，2019年受访企业对政策政务环境总体评价较高，近九成企业对政策政务环境评价为较满意及以上。

（一）政策法规出台前广泛征求专家和企业意见建议

2019年以来，我国政府出台了一系列政策法规，营商环境政策法律体系不断完善。在营商环境政策法规制定过程中，注重广泛听取各方，尤其是专家和企业家意见和建议，政策法规制定更加科学化，更加聚焦企业关注的痛点难点。比如，2019年1月15日，李克强总理主持召开座谈会，听取专家学者和企业界人士对《政府工作报告（征求意见稿）》的意见建议；7月15日，李克强总理主持召开经济形势专家和企业家座谈会，分析当前经济运行情况，听取意见建议。各部门在制定法律法规过程中也十分注重广泛听取企业意见建议，截至2019年8月底，我国已有15部法律草案向社会公开征求意见。

（二）出台首个国家级优化营商环境行政法规

7月14日，国家发展改革委牵头会同有关部门研究起草《优化营商环境条例（征求意见稿）》，并向社会公开征求意见。10月8日，李克强总理主持召开国务院常务会议，审议通过《优化营商环境条例（草案）》，通过政府立法为各类市场主体投资兴业提供制度保障。这是我国正式制订的首个国家级优化营商环境行政法规，覆盖了市场环境、政务服务、监管执法、法治保障等多方面。通过把这些年来在优化营商环境方面大量行

Chapter IV China's Achievements in Fostering a Better Business Environment

In recent years, the CPC Central Committee and the State Council have issued a series of measures aimed at optimizing the business environment in China and local governments and authorities have been assiduously implementing the national strategic deployment, further deepening the reform and expanding market opening, thus effectively arousing the market vitality and social creativity, and giving great impetus to the continuous improvements in the business environment.

I.The policy and government environment continues to be optimized

Since the beginning of 2019, China has injected new impetus into high-quality economic development by unveiling a number of policies and regulations aimed at optimizing its business environment and comprehensively deepening the reform of "streamlining administration, delegating power and improving government services". According to the CCPIT questionnaire survey, enterprises surveyed in 2019 give generally high scores on the policy and government environment and nearly 90% of these enterprises are satisfied or very satisfied.

i. Comments and suggestions have been extensively solicited from experts and enterprises before the introduction of relevant policies and regulations

Since the beginning of 2019, the Chinese government has issued a series of policies and regulations, with the system of policies and laws for the business environment continuously improved. In the development of such policies and regulations, China has attached great importance to hearing comments and suggestions from all stakeholders, especially experts and enterprises, so that policies and regulations can be more scientific and focus more on bottlenecks and difficulties facing enterprises. For example, Premier Li Keqiang presided over a symposium on January 15, 2019, hearing opinions and advice from experts, scholars and businesses on the Report on the Work of the Government (Exposure Draft); Li chaired a symposium on the economic situation with experts and entrepreneurs on July 15, analyzing the current economic operations and hearing opinions and advice. Authorities concerned have also paid attention to extensively listening to opinions and suggestions from enterprises in the development of laws and regulations. As at the end of August 2019, China has solicited public opinions for 15 draft laws.

ii. The first national administrative regulation for a better business environment has been issued

On July 14, NDRC led and worked with relevant authorities in the study and development of the Regulation on Optimizing the Business Environment (Exposure Draft) and solicited public opinions on the draft. On October 8, Premier Li hosted an executive meeting of the State Council, which deliberated and approved the Regulation on Optimizing the Business Environment (Draft), providing institutional guarantee for investment and business start-up by various market players through government legislation. This is the first formal national administrative regulation to optimize the business environment, which covers market environment, government

之有效的政策、经验、做法上升到法规制度，使其进一步系统化、规范化，增强权威性、时效性和法律约束力，从而在制度层面为优化营商环境提供了更加有力的保障和支撑。

（三）“放管服”改革扩围提效

2019 年以来，“放管服”改革向全面纵深推进。

一是政府放权力度进一步加大。各级政府继续用政府权力的减法换取市场活力的乘法，放权于市场，还权于企业，解决经济社会生活中管得多、门槛高、束缚重、办事难等问题。2 月 13 日，央行发布《关于取消企业银行账户许可的通知》，提出在 2019 年底前分批取消企业银行账户许可。至 7 月 22 日，全国已全面取消全国企业银行账户许可，比计划提前 5 个月完成。这意味着已经实施 25 年的企业银行账户许可正式“谢幕”。3 月 6 日，国务院决定取消 25 项行政许可事项，下放 6 项行政许可事项的管理层级。6 月 25 日，国务院召开全国深化“放管服”改革优化营商环境电视电话会议，李克强总理要求，2019 年要把工业生产许可证种类再压减一半以上，中央层面再取消下放 50 项以上行政许可。

二是商事制度改革取得重大进展。商事制度改革作为“放管服”改革先手棋和突破口，激发了市场经济的内在活力，改善了企业的政务环境。2 月 26 日，国务院办公厅正式对外发布了《关于压缩不动产登记办理时间的通知》，提出在 2019 年底前，全国所有市县一般登记、抵押登记业务办理时间力争分别压缩至 10 个、5 个工作日以内；2020 年底前，全国所有市县一般登记、抵押登记业务办理时间力争全部压缩至 5 个工作日以内。2019 年上半年，我国企业开办时间实现了由 2018 年平均 20 天压缩至 8.5 天以内的目标，日均新设企业 1.94 万户，同比增长 7.1%，同时全国 71.79 万户企业通过简易注销程序退出市场[①]。在本次调查中，2019 年企业设立与退出环境评价为 4.274 分，2018 年为 4.03 分，提高 0.244 分。

三是市场监管机制愈发完善。2 月 15 日，国务院印发《关于在市场监管领域全面推行部门联合“双随机、一公开”监管的意见》，要求到 2019 年底，市场监管部门完成双随机抽查全流程整合。到 2020 年底，实现市场监管领域相关部门“双随机、一公开”监管全覆盖。7 月 18 日，在国新办举行的加快推进社会信用体系建设构建以信用为基础新型监管机制吹风会上，市场监管总局有关负责同志表示，市场监管总局制定了统一的抽查事项清单，纳入 25 大类 69 个抽查检查事项，全年双随机抽查覆盖企业比例达 5%，同时将双随机抽查与企业信用风险分类监管相结合，根据企业风险度、信用度科学确定

① 我国上半年日均新设企业 1.94 万户 同比增长 7.1%- 新华网，2019-07-05

services, regulation and law enforcement, guarantee from the rule of law and other aspects. By incorporating a large number of effective policies, experience and practices in optimizing the business environment over the years into laws and regulations, so that they are further systematic and normative and more authoritative, time-based and legally binding, China provides more powerful institutional guarantee and support for optimization of the business environment.

iii. The reform of "streamlining administration, delegating power and improving government services" is being expanded with higher efficiency

Since the beginning of 2019, the reform of "streamlining administration, delegating power and improving government services" has made headway in depth..

Firstly, the government has stepped up its efforts to delegate power. Governments at all levels continue to seek multiplication of market vitality through reduction of government power, delegate power to the market and return power to enterprises, so as to address problems such as excessive control, high thresholds, heavy restrictions and complex procedures in economic and social life. On February 13, the central bank released the Notice on Cancelling the Issuance of the License for Opening Enterprises' Bank Accounts, which states that the issuance of the license for opening enterprises' bank accounts shall be cancelled in batches by the end of 2019. As of July 22, the issuance of license for opening enterprises' bank accounts had been cancelled nationwide, 5 months ahead of schedule. This means the 25-year licensing for opening enterprises' bank accounts officially came to an end. On March 6, the State Council decided to cancel 25 administrative licensing items and delegate to lower-level authorities 6 administrative licensing items. On June 25, the State Council held a national picturephone meeting on deepening the reform of streamlining administration, delegating power and improving government services and optimizing the business environment, where Premier Li requested to cut the types of industrial production license by more than a half in 2019 and to cancel and delegate to lower-level authorities more than 50 administrative licenses at the central level.

Secondly, great progress has been made in the reform of the commercial system. The commercial system reform, as an offensive move and the key to the reform of "streamlining administration, delegating power and improving government services", has stimulated the inherent vitality of market economy and improved the government environment for enterprises. On February 26, the General Office of the State Council officially released the Circular on Reducing the Time Required for Immovable Property Registration, which proposes to strive to reduce the time required for general registration and mortgage registration in all cities and counties to less than 10 and 5 working days, respectively, by the end of 2019 and both to less than 5 working days at the end of 2020. In the first half of 2019, the time required for setting up a business in China had been cut from averagely 20 days in 2018 to less than 8.5 days, with 19,400 new businesses set up on average every day, representing a year-on-year increase of 7.1%, and at the same time, 717,900 enterprises withdrew from the market through simple cancellation procedures throughout the country[a]. In the survey, the enterprise establishment and exit environment in 2019 scores 4.274 points, an increase of 0.244 points over 2018, when the score was 4.03 points.

Thirdly, the market regulation mechanism is getting perfect. On February 15, the State Council printed and released the Opinions on Comprehensively Implementing the Oversight Model of Random Inspection and Public Release in Market Regulation, which requires market regulatory authorities to complete process integration for random inspection by the end of 2019 and maintain full coverage of the oversight model of random inspection and public release by authorities concerned in the field of market regulation by the end of 2020. On July 18, at the briefing held by the State Council Information Office (SCIO) to accelerate the construction of the social credit system and the new credit-based regulatory mechanism, officials from the State Administration for Market Regulation (SAMR) stated that the SAMR has developed a unified list of random inspection items, which includes 25 categories of 69 items, with the oversight model covering 5% of the enterprises every year.

① China witnessed averagely 19,400 new businesses every day in the first half of 2019, increasing 7.1% year on year – Xinhuanet, July 5, 2019

抽查比例，着力提高监管效能。综合监管、智慧监管水平的不断提高，进一步减轻了企业的负担，提高了监管科学化、规范化水平。

案例：广西商事制度改革成效显著

近年来，广西持续深化“多证合一”改革，整合涉企事项目录，形成了具有广西特色的“三十九证合一”模式。在全区范围内对 100 项审批改革事项，按照直接取消审批、审批改为备案、实行告知承诺、优化准入服务等四种方式推行“证照分离”改革。大力推行市场主体简易注销改革，为企业节约了注销公告费，有效降低了制度性交易成本。同时，投资管理工作重心从事前审批向以政策性条件引导、企业信用承诺、监管有效约束为核心的管理新模式转变，推广应用投资项目在线并联审批监管平台。全区 134 个市、县（区、开发区）政务服务中心已有 115 个实现了企业开办有关部门全部进驻办公，91% 的市、县（区、开发区）基本实现了 1 个工作日办结；大部分市县实现用地预审 10 个工作日内办结，投资项目核准 5 个工作日办结，备案 2 个工作日办结，节能审查 9 个工作日办结。

（四）国家政务服务平台主体功能建设初步完成

近两年来，国家在推进“互联网 + 政务服务”和加快政务服务平台建设方面，先后出台了《关于加快推进“互联网 + 政务服务”工作的指导意见》《关于印发“互联网 + 政务服务”技术体系建设指南的通知》《关于深入推进审批服务便民化的指导意见》《关于进一步深化“互联网 + 政务服务” 推进政务服务“一网、一门、一次”改革实施方案》《关于加快推进全国一体化在线政务服务平台建设的指导意见》等一系列重要文件。其中，《关于加快推进全国一体化在线政务服务平台建设的指导意见》的出台顺应了政务服务平台从分头建设向集中管理、从信息孤岛到协同共享转变的要求，明确了全国一体化在线政务服务平台建设的基本原则、工作目标、主要任务、保障措施，通过充分利用各地区各有关部门已建的政务服务平台，整合各类政务服务资源，以此推动全国政务服务平台不断提升建设集约化、管理规范化、服务便利化水平。

2019 年 4 月，国务院公布《关于在线政务服务的若干规定》（以下简称《规定》），旨在全面提升政务服务规范化、便利化水平，为企业和群众提供高效、便捷的政务服务。同时，《规定》明确了要加快建设全国一体化在线政务服务平台，推进各地区、各部门政务服务平台规范化、标准化、集约化建设和互联互通，推动实现政务服务事项全国标准统一、全流程网上办理，促进政务服务跨地区、跨部门、跨层级数据共享和业务协同，

Meanwhile, random inspection will be combined with enterprise credit risk classification and regulation, so as to determine the scientific proportion of random inspection based on enterprise risks and credit and thus effectively raise regulatory efficiency. Continuous improvements in comprehensive and intelligent regulation have further reduced the burden on enterprises and made regulation more scientific and normative.

Case study: the commercial system reform has made remarkable headway in Guangxi

In recent years, Guangxi continues to deepen the reform of "integrating multiple certificates into one license", integrate the catalogue of business-related items and form the model of "integrating 39 certificates into one license" with Guangxi characteristics. It has promoted the reform of "separation of business licenses and government permits" by handling 100 examination and approval items in four ways, such as directly cancelling examination and approval, replacing examination and approval with filing, implementing notification commitment and optimizing access services, throughout the region. Also, it has energetically pushed forward the reform of simple market player cancellation, saving cancellation fees for enterprises and effectively cutting institutional transaction costs. Meanwhile, Guangxi has shifted the focus of investment management from prior examination and approval to the new management model with guidance of policy-based conditions, enterprise credit commitment and effective regulatory constraints at its core, and promoted the application of the online joint examination and approval regulatory platform for investment projects. Of the 134 government service centers at the city and county (district, development zone) levels throughout the region, 115 ones have service integration among authorities concerned for new businesses and 91% of the cities and countries (districts and development zones) have basically achieved completion of services within one working day; most cities and counties have realized completion of land use pre-examination within 10 working days, completion of approval of investment projects within five days, completion of filing within two working days and completion of energy audit within nine working days.

iv. Preliminary completion of construction of main function part of the national service platform of government affairs

In recent two years, to promote the "Internet Plus Government Services" and accelerate the building of the government service platform, China has successively issued a series of important documents such as the Guiding Opinions of the State Council on Vigorously Advancing the "Internet Plus" Action, the Circular on Issuing the Guidance for Building the Technical System of "Internet Plus Government Services", and Guiding Opinions on Further Improving More Convenient Approval Services, Circular on Printing and Issuing the Implementing Program for Further Improving Internet Plus Government Services and Promoting the Reform for Providing Online, Offline and In-person Access to One-stop Government Services, and the Guiding Opinions on Accelerating the Promotion of the Building of National Integrated Online Government Service Platform. Among them, the release of the Guiding Opinions on Speeding up the Building of National Integrated Online Government Service Platform conforms to the requirements of transforming government service platform from separate construction to centralized management, from isolated information island to collaborative sharing. This document defines the basic principles, work objectives, main tasks and guarantee measures for building a national integrated online government service platform, and integrates all kinds of government service resources by making full use of the government service platforms already built by the relevant departments in various regions, so as to equip the national government service platform with higher level of intensive construction, standardized management and service facilitation.

In April 2019, the Several Provisions of the State Council on Online Government Services (hereinafter referred to as the Provisions) was released, in a bid to comprehensively standardize and facilitate government services and, deliver a more efficient, convenient service to the public and enterprises, and foster a better business environment. Meanwhile, the Provisions also specified that efforts should be made to accelerate the building of nationally integrated online government service platform, facilitate the standardization, streamlining and inter-connectivity of government service platforms at all regions and departments, promote the nationally unified standards to be adopted in all government services, expedite online handling for all procedures, advance the sharing of government services and business collaboration across all regions, departments and levels, and push

并依托一体化在线平台推进政务服务线上线下深度融合。政务事项的全国标准统一，有助于明确政务服务事项的基准，进而做到相同情况相同对待，不同情况不同处理。通过全流程网上办理，实现“让数据多跑路，让群众少跑腿”。

截至 2019 年 7 月，作为实现全国“一网通办”总枢纽的国家政务服务平台主体功能建设已完成并开始试运行，初步具备统一的身份认证、事项管理、电子证照、电子印章、数据共享等能力。目前，全国 32 个省级政府和 40 余个国务院部门全部建设了自己的政务服务平台，并初步实现了与国家政务服务平台的全面对接。在更大范围推广政务服务“一网通办”的条件已基本成熟[①]。

（五）更大规模的减税降费政策落地实施

2019 年以来，财政部在全面落实已出台减税降费政策的同时，抓紧研究更大规模的减税及更为明显的降费政策，取得了显著成效，主要包括四个方面[②]：

一是对小微企业实施普惠性税收减免。2019 年 3 月 17 日，财政部、税务总局发布《关于实施小微企业普惠性税收减免政策的通知》，主要有如下四方面改进。第一，对月销售额 10 万元以下的增值税小规模纳税人（之前为 3 万元），免征增值税。第二，放宽小型微利企业标准并加大优惠力度，放宽后的条件为企业资产总额 5000 万元以下、从业人数 300 人以下、应纳税所得额 300 万元以下。在税率优惠方面，对小型微利企业年应纳税所得额不超过 100 万元的部分，减按 25% 计入应纳税所得额，按 20% 的税率缴纳企业所得税；对年应纳税所得额超过 100 万元但不超过 300 万元的部分，减按 50% 计入应纳税所得额，按 20% 的税率缴纳企业所得税。第三，小规模纳税人交纳的部分地方税种可实行减半征收，即允许各地按程序在 50％幅度内减征资源税、城市维护建设税、印花税、城镇土地使用税、耕地占用税等地方税种以及教育费附加和地方教育附加。第四，扩展初创科技型企业优惠政策适用范围，对创投企业和天使投资个人投向初创科技型企业可按投资额 70％抵扣应纳税所得额的政策。把投资的初创科技型企业的范围或者标准进一步扩大，扩展到从业人数不超过 300 人、资产总额和年销售收入不超过 5000 万元的初创科技型企业。

二是深化增值税改革，继续推进实质性减税。2019 年 3 月 21 日，财政部、国家税务总局、海关总署联合发布《关于深化增值税改革有关政策的公告》，打出“降、加、扩、退”减税组合拳：4 月 1 日起，将 16% 和 10% 两档税率分别降至 13% 和 9%；对生产、生活性

① “一网通办”和“一网通管”建设进入关键节点 - 经济参考报，2019-07-11
② 财政部：2019 年减税降费主要包括四个方面 - 金融界网站，2019-01-15

ahead with the deep integration of online and offline channels for government services through the integrated online platform. Using nationally unified standards can help make clear of the baseline in all government services, so that same situations can be treated equally and different conditions will be handled properly with tailored methods. While the online handling of all procedures can ensure that data, instead of the people, travel the distance.

By July 2019, the major section of the national government service platform that carries the main functions, as the hub of handling all matters through one network, has been completed and has come into trial operation. It has largely enabled such functions as ID authentication, issue management, E-ID, E-seal and data sharing. By now, 32 provincial-level governments and more than 40 departments of the State Council have established their government service platforms, and have almost finished their full connection to the national government service platform. At the present stage, it is high time that the "handling all matters through one network" mode should be promoted nationwide[a].

v. Implementing tax cut and fee reduction policies on a larger scale

Since the beginning of 2019, along with the full implementation of tax cut and fee reduction policies, the Ministry of Finance has also stepped up its efforts to work on policies that enable tax cuts on a larger scale and fee reduction with more tangible benefits, which policies mainly involve four aspects[b]:

1. Fully implement general-benefit tax cut and fee reduction policies for small and micro businesses. On March 17, 2019, the Ministry of Finance and the State Administration of Taxation released the Notice on Implementing the Inclusive Tax Deduction and Exemption Policies for Small and Micro Businesses, which offers improvements in four aspects: first, taxpayers with monthly sales less than RMB 100,000 (against the previous line of RMB 30,000) will be exempted from value-added tax; second, for low-profit small businesses, taxation standards will be lowered and preferential policies will be more favorable; eligible businesses include those with total asset of less than RMB 50 million, the number of employees less than 300 persons, and taxable income less than RMB 3 million. In terms of tax rate discount, for the portion of the annual taxable income of low-profit small businesses not exceeding RMB 1 million, the taxable income shall be included in the taxable income by 25%, and the business income tax shall be paid at a tax rate of 20%; for those whose annual taxable income exceeds RMB 1 million but does not exceed RMB 3 million, the taxable income shall be reduced by 50% to the taxable income amount, and the enterprise income tax shall be paid at a rate of 20%. Third, part of the local taxes paid by small-scale taxpayers can be halved, which means local governments are allowed to reduce, by less than 50%, local taxes, such as resource tax, urban maintenance and construction tax, stamp duty, urban land use tax, farmland use tax, as well as educational surtax and local educational surtax in accordance with the procedures. Fourth, expand the scope of application of preferential policies for science and technology startups. For venture capital businesses and angel investors investing in technology startups, they will enjoy a deduction for 70% of their total investment volume. The scope or standards of invested science and technology startups will be further expanded: eligible businesses will be those with no more than 300 employees, total assets and annual sales income of less that RMB 50 million.

2. Deepen value-added tax reform and further promote tax cuts in a more concrete manner. On March 21, 2019, the Ministry of Finance, the State Administration of Taxation and the General Administration of Customs jointly released the Announcement on Reverent Policies for Deepening the Value-added Tax Reform to introduce a set of tax cut measures of lowering the tax rate, gradually expanding its scope, strengthening supervision, and applying tax refund: since April 1, the tax rates of 16% and 10% will be lowered to 13% and 9%; for the life service sector and the producer service sector, their input VAT will be applied with additional deduction; the

① The platform of "handling all matters through one network" and "regulating all maters through one network"enters a critical phase in its development-- Economic Information Daily, July 11, 2019

② The Ministry of Finance: Tax cuts and fee reductions focus on four aspects in 2019—JRJ.com, January 15, 2019

服务业进项税额加计抵减；扩大可抵扣进项税范围，将国内旅客运输服务纳入抵扣范围、允许不动产进行一次性抵扣；所有行业试行增值税期末留抵税额退税制度。

三是全面实施修改后的个人所得税法及其实施条例，落实好 6 项专项附加扣除政策，减轻居民税负。2019 年 1 月 1 日，个人所得税新政策正式实施，2019 年将执行 5000 元个税起征点和新个税税率表，同时个税新政还增加了子女教育、赡养老人等 6 项专项附加扣除，进一步增进税收公平，降低了居民的税负。

四是配合相关部门，积极研究制定降低社会保险费率综合方案，进一步减轻企业的社会保险缴费负担。2019 年 4 月 4 日，国务院办公厅发布《降低社会保险费率综合方案》，自 2019 年 5 月 1 日起，降低城镇职工基本养老保险单位缴费比例，目前单位缴费比例高于 16% 的省份，可降至 16%；实施失业保险总费率 1% 的省，延长阶段性降低失业保险费率的期限至 2020 年 4 月 30 日。

与 2018 年相比，2019 年的减税降费措施力度大、覆盖面广，直击当前市场主体的难点和痛点，是改善营商环境、激发市场活力、释放发展潜能的重大举措。随着减税降费政策的有序实施，减税降费效应不断释放。

降低社保费率成效初步显现：今年上半年，企业职工养老保险、失业保险、工伤保险实际减费达到 1288 亿元；调整缴费基数政策正在逐步落实到位，实际减负效果下半年将进一步增强。预计全年减轻社保缴费超过 3100 亿元[①]。

国家税务总局 7 月 23 日发布数据显示：今年上半年，全国累计新增减税降费 11709 亿元（2018 年全年减税降费规模约 1.3 万亿元），其中减税 10387 亿元，主要包括增值税改革减税 4369 亿元（其中调整增值税税率翘尾减税 1184 亿元，深化增值税改革减税 3185 亿元）；小微企业普惠性政策减税 1164 亿元；个人所得税两步改革叠加减税 3077 亿元，人均累计减税 1340.5 元，累计 1.15 亿人无需再缴纳工薪所得个人所得税。[②]

二、对外开放水平再上新台阶

当前，我国在推进对外开放、构建开放型经济新体制方面亮点频现：从国家主席习近平在首届中国国际进口博览会开幕式上宣布五条对外开放重磅举措到举办“一带一路”国际合作高峰论坛，从加快推进自贸试验区扩围升级到外资准入负面清单不断缩减，我国在对外开放的道路上更加自信、坚定、从容。贸促会组织的企业问卷调查显示，受访外资企业对我国对外开放持积极乐观态度。

① 下半年社保降费减负效果将增强 全年料超 3100 亿 - 经济参考报，2019-07-22
② 2 万亿减税降费目标已实现近六成 全年减税降费规模可能超预期 - 中国经济周刊，2019-08-01

range of deductible input tax will be expanded; domestic passenger transport services will also be included into the range; property services can be applied with lump-sum deduction; all sectors will trial run the refund of the end-of-tax-period VAT credit.

3. Fully implement the revised Law on Personal Income Tax and its implementing regulations and ensure the implementation of deduction of surcharges on 6 specialized items to lower the people’s tax burdens. From January 1, 2019 on, the new Law on Personal Income Tax will be officially implemented. In 2019, the new personal income tax threshold, which is RMB 5000, and its new tax rate table will be put into effect. Meanwhile, the new law has also included 6 specialized items for deduction of surcharges, involving children’s education and care for the elderly, in a bid to further promote equal taxation, which has lowered the people’s ax burdens.

4. Cooperate with relevant departments to proactively work on a comprehensive solution for lowering the social insurance premium rate to further reduce social insurance contribution of enterprises. On April 4, 2019, the General Office of the State Council released the Notice on Issuing the Comprehensive Plan of Reducing Social Insurance Premium Rates. From May 1, 2019, the proportion of contributions paid by urban employee pension insurance will be decreased. For provinces with the proportion of contribution of more than 16%, the proportion will be lowered to 16%; for provinces with unemployment insurance contribution rate of 1%, the period for phased reduction of unemployment insurance rates will be extended to April 30, 2020.

Compared to 2018, tax cut and fee reduction policies have been implemented with greater efforts on a larger scale in 2019, hitting the hard parts and pain points of the current market entities. It is a major move in improving environment, stimulate market vitality and unleash development potential. The policy will release more tangible benefits when being further implemented in an orderly manner.

Reducing social security rates has started to produce some tangible results: in the first half of this year, the actual cost reduction of enterprise employees’ pension insurance, unemployment insurance and industrial injury insurance reached RMB 128.8 billion; the policy of adjusting the payment base has been gradually put in the right place, and the actual burden reduction effect will be further enhanced in the second half of the year. It is estimated that the annual reduction of social security contributions will exceed RMB 310 billion[a].

Data released by the State Taxation Administration on July 23 showed that in the first half of this year, China achieved a total of RMB 1.1709 trillion in tax cuts and fee reductions (about RMB 1.3 trillion in 2018), including RMB 1.0387 trillion in tax cuts. It mainly includes VAT reform tax reduction of RMB 436.9 billion (including tax reduction from adjusting VAT tax rate of RMB 118.4 billion, tax reduction from deepening VAT reform of RMB 318.5 billion); the tax reduction from the general-benefit policy for small and micro businesses is RMB 116.4 billion; the two-step reform of individual income tax adds up to a tax reduction of RMB 307.7 billion, with a cumulative tax reduction of RMB 1340.5 per capita. A total of 115 million people no longer have to pay personal income tax on their wages[b].

II.New height of opening up strategy

At present, China is promoting an opening up policy to the outside world. Highlights of building a new open economic system are reflected in many aspects, for example, President Xi Jinping's announcement of five major measures of opening up to the outside world at the opening ceremony of the first China International Import Expo, the holding of the Belt and Road Forum for International Cooperation, the efforts to speed up the expansion and upgrading of trade pilot zones, and the continuous shortening of the negative list for the access of foreign investment. By doing so, China has become more confident, firm and calm on the road of opening up to the outside world. A questionnaire survey on enterprises organized by the China Council for the Promotion of International Trade shows that the foreign-funded enterprises surveyed are positive and optimistic about China's opening-up strategy.

① The effect of efforts to reduce social insurance contributions will be enhanced in the second half of 2019. It is estimated that the annual reduction of social insurance contributions will exceed RMB 310 billion--- Economic Information Daily, July 22, 2019.

② The target of reducing RMB 2 trillion of taxes and fees has been achieved by nearly 60%. The annual scale of tax cuts and fee reductions may exceed the expectation--China Economic Weekly, August 1, 2019.

（一）出台新时代我国外商投资领域新的基础性法律

为进一步扩大对外开放，积极促进外商投资，保护外商投资合法权益，规范外商投资管理，推动形成全面开放新格局，2019 年 3 月 15 日，十三届全国人大二次会议表决通过了《中华人民共和国外商投资法》。这部法律自 2020 年 1 月 1 日起施行，将取代之前的“外资三法”，成为新时代我国外商投资领域新的基础性法律。制定外商投资法意义重大，是贯彻落实党中央扩大开放、促进外商投资决策部署的重要举措；是我国外商投资法律制度与时俱进、完善发展的客观要求；是促进社会主义市场经济健康发展、实现经济高质量发展的客观要求。外商投资法的出台，将会为更多外国投资者提供更有力的保护和更好的商业环境。2019 年 12 月 12 日，国务院常务会议通过了《中华人民共和国外商投资法实施条例（草案）》，实化促进和保护外商投资的措施。此草案与外商投资法，将于 2020 年 1 月 1 日同步配套实施。这是中国以法治推进更高水平对外开放走出的坚定一步。

（二）外资准入负面清单条目逐渐缩减

作为我国重大开放举措的重要组成部分，2019 年 6 月 30 日，国家发改委、商务部发布了《外商投资准入特别管理措施（负面清单）（2019 年版）》，进一步缩短了清单长度，清单条目由 48 条减至 40 条，压减比例 16.7%，在所有行业领域均没有新增或加严限制；在交通运输、增值电信、基础设施、文化等服务业领域，以及制造业、采矿业、农业领域均推出了新的开放措施，在更多领域允许外资控股或独资经营。同日，两部门又发布了《自由贸易试验区外商投资准入特别管理措施（负面清单）（2019 年版）》，清单条目由 45 条减至 37 条，压缩比例 17.8%。在全国开放措施的基础上，2019 年版自贸试验区外资准入负面清单取消了水产品捕捞、出版物印刷等领域对外资的限制，继续进行扩大开放先行先试。两份清单均于 2019 年 7 月 30 日起施行。时隔一年再次修订外资准入负面清单，并在一系列领域推出新的开放措施，这充分彰显出我国坚定不移扩大对外开放的决心。同时，两部门还发布了《鼓励外商投资产业目录（2019 年版）》，鼓励外资在现代农业、先进制造、高新技术、节能环保、现代服务业等领域加大投资力度。外资准入负面清单是我国实行准入前国民待遇加负面清单管理制度的基本依据，负面清单越来越短、开放领域越来越多，说明我国开放的大门越开越大，不仅为各国投资者创造更多发展机遇，也将通过更大范围的投资合作促进自身产业和技术不断进步，建设更具活力、更有效率的市场体系。2019 年 11 月，国家发改委、商务部发布了《市场准入负面清单（2019 年版）》，其列入事项比 2018 年版减少了 20 项，表明中国为改善

i. Introducing the new Basic Law in the Field of Foreign Investment in the new era

In order to further expand the opening-up, actively promote foreign investment, protect the legitimate rights and interests of foreign investment, standardize the management of foreign investment, and promote the formation of a new pattern of all-round opening up, the Chinese Government adopted the Foreign Investment Law of the People's Republic of China at the Second Session of the 13th National People's Congress on March 15, 2019. The Foreign Investment Law, which will come into effect on January 1, 2020, will replace the previous three major laws on foreign investment and become the new basic law in the field of foreign investment in the new era. The formulation of the Foreign Investment Law is of great significance, which is an important move to implement the Party Central Committee’s decisions and arrangements to expand the opening-up and promote foreign investment; an objective requirement for China’s foreign investment legal system to keep pace with the times and improve its development; as well as an objective requirement to promote the healthy development of the socialist market economy and achieve high-quality economic development. The introduction of the Foreign Investment Law will provide more foreign investors with stronger protection and a better business environment. On December 12, 2019, the Executive Meeting of the State Council adopted the "Regulations for the Implementation of the Foreign Investment Law of the People's Republic of China (Draft)" to stipulate measures to promote and protect foreign investment. This draft will be implemented simultaneously with the Foreign Investment Law on January 1, 2020, which represents a firm step for China to advance further opening-up with the rule of law.

ii. Negative list for the access of foreign investment is gradually shortened

As an important part of China's opening up strategy, on June 30, 2019, the National Development and Reform Commission and the Ministry of Commerce issued the Special Administrative Measures (Negative List) for the Access of Foreign Investment (2019). The negative list for the access of foreign investment, further shortening the length of the list, with number of entries reduced from 48 to 40, a reduction of 16.7%, and there is no new or stringent restriction in all sectors; new opening up measures have been introduced in the fields of transportation, value-added telecommunications, infrastructure, culture and other service industries, as well as the manufacturing, mining and agricultural sectors, in a bid to allow foreign ownership enterprises or sole proprietorship enterprise to operate in more areas. On the same day, the two ministries also issued the Special Administrative Measures (Negative List) for the Access of Foreign Investment in Pilot Free Trade Zones (2019). The number of items in the list is reduced from 45 to 37, a reduction of 17.8 percent. Based on the national-level opening up strategy, this negative list removes restrictions on foreign investment in areas such as fishing of aquatic products and printing and publications, and continues to open wider to the outside world. Both lists have come into force on 30 July 2019. After the revision in the last year, the negative list for the access of foreign investment is revised again, and new opening-up measures have been introduced in a series of fields, which fully demonstrates China's unswerving determination to open wider to the outside world. At the same time, the two ministries have also issued the Catalogue of Industries for Guiding Foreign Investment (2019), encouraging more and stronger foreign investments in modern agriculture, advanced manufacturing, high and new technology, energy conservation and environmental protection, modern service industries, and other fields. The negative list for the access of foreign investment is the fundamental basis for China to implement the management system of national treatment and negative list before admittance. The negative list is getting shorter and shorter, and there are more and more open fields, which show that the door of opening up in our country is opening wider. It will not only create more development opportunities for investors from all over the world, but also promote the continuous progress of their own industries and technology through a wider range of investment cooperation, and build a more dynamic and efficient market system.In November 2019, the National Development and Reform Commission and the Ministry of Commerce released the "Negative List for Market Access (2019 Edition)",

商业环境做出了努力。

受益于我国外商投资环境的进一步完善，我国吸收外资增速创出新高。商务部数据显示[①]，2019 年 1-11 月全国新设立外商投资企业 36747 家，实际使用外资 8459.4 亿元人民币，同比增长 6.0%（折 1243.9 亿美元，同比增长 2.6%）；同时，我国吸收外资的质量也在稳步提升，1-11 月高技术产业实际使用外资 2407 亿元人民币，同比增长 27.6%，其中高技术制造业实际使用外资 834.3 亿元人民币，同比增长 5.7%；高技术服务业实际使用外资 1572.7 亿元人民币，同比增长 43.4%。在主要投资来源地中，英国、韩国、德国 1-11 月投资增速较快，分别同比增长 198.9%、38.7% 和 30.2%；“一带一路”沿线国家、东盟、欧盟实际投入外资金额同比增长 14.9%、15.7% 和 16.1%。

（三）自贸试验区建设取得新成效

2019 年以来，自贸试验区试点布局进一步优化。7 月 27 日，国务院正式印发《中国（上海）自由贸易试验区临港新片区总体方案》，119.5 平方公里上海自贸试验区临港新片区先行启动区域将建立投资贸易自由化为核心的制度体系。8 月 2 日，国务院正式批复设立山东、江苏、广西、河北、云南、黑龙江 6 个自贸试验区。值得一提的是，在广西、云南和黑龙江设立自贸试验区，是首次在沿边地区布局自贸试验区。自 2013 年上海自贸试验区设立以来，截至目前，我国自贸试验区已扩大至 18 个，形成“1+3+7+1+6”、覆盖东西南北中的改革开放创新格局。

持之以恒的开放创新造就了自贸试验区优良的营商环境，也吸引了境内外企业来此投资兴业。2019 年前三季度，原有 12 个自贸试验区新设企业 19.5 万家，其中新设外资企业近 5000 家，占全国的 15.6%；实际使用外资 988.4 亿元人民币，占全国的 14.5%；进出口总额 2.8 万亿元，占全国的 12.4%。同时，自贸试验区不断总结提炼压力测试和改革创新成果，累计形成 223 项制度创新成果向全国复制推广，带动了全国整体营商环境的优化。世界银行《2020 年营商环境报告》显示，中国营商环境 2019 年排名跃升全球第 31 位，这其中许多指标的大幅改善源自于自贸试验区的探索。世贸组织自 2014 年以来对中国进行的历次贸易政策审议中，均对自贸试验区建设举措作出了积极评价。

案例：上海自贸区成立新片区

2019 年 8 月 6 日，国务院印发《中国（上海）自由贸易试验区临港新片区总体方案》

① 商务部通报今年前 11 月全国吸收外资情况 - 商务部网站，2019-12-17

with 20 fewer items included than the 2018 version, indicating that China has made great efforts to improve its business environment.

Benefiting from better environment for foreign investment in China, the growth rate of foreign investment absorption in China has reached a new high. Data from the Ministry of Commerce show that[a] ,from January to November 2019, 36,747 new foreign-invested enterprises were set up nationwide, with the actual use of foreign investment of RMB 845.94 billion, an increase of 6.0% over the same period last year (USD 124.39 billion, up 2.6% from the same period last year); at the same time, the quality of China's absorption of foreign investment is also steadily improving. From January to November, the actual use of foreign investment in high-tech industries was RMB 240.7 billion, an increase of 27.6% over the same period last year, of which RMB 83.43 billion was actually used in high-tech manufacturing, an increase of 5.7% over the same period last year; the foreign investment actually used in the high-tech service industry was RMB 157.27 billion, an increase of 43.4% over the same period last year. Among the main sources of investment, investment in Britain, South Korea and Germany grew rapidly from January to November, up 198.9%, 38.7% and 30.2% respectively from the same period last year. The actual amount of foreign investment made by countries along the Belt and Road Initiative route, ASEAN and European Union increased by 14.9%, 15.7% and 16.1% respectively over the same period last year.

iii. New achievements have been made in the construction of pilot free trade zone

Since 2019, the pilot layout of the Free Trade Zones(FTZs) has been further optimized. On July 27, the State Council officially issued the Framework Plan for the New Lingang Area (Shanghai) Pilot Free Trade Zone. The new area of Shanghai Pilot Free Trade Zone, covering an area of 119.5 square kilometers, will establish an institutional system with investment and trade liberalization as the core in its first-launch part. On August 2, the State Council formally approved the establishment of six pilot free trade zones in Shandong, Jiangsu, Guangxi, Hebei, Yunnan and Heilongjiang. It is worth mentioning that the pilot free trade zones to be set up in Guangxi, Yunnan and Heilongjiang are the first attempts of its kind in border areas. Since the establishment of the Shanghai Pilot Free Trade Zone in 2013, the number of pilot free trade zones in China has increased to 18, forming a reform and opening up innovation pattern of "1 + 3 + 7 + 1 + 6" covering all areas nationwide.

Persistent innovations in opening-up have created excellent business environment for FTZs and attracted domestic and foreign companies to settle in FTZs. In the first three quarters of 2019, there were 195,000 enterprises newly settled in the original 12 FTZs, including nearly 5,000 foreign enterprises, accounting for 15.6% of the national total; the actual use of foreign capital was 98.84 billion yuan, accounting for 14.5% of the national total; the total export-import volume was 2.8 trillion yuan, accounting for 12.4% of the national total. In the meantime, FTZs have facilitated the optimization of the overall business environment across the country by continuously summarizing the results of stress tests, reforms and innovations, and forming a total of 223 institutional innovation results to be replicated and promoted nationwide. The World Bank's "Doing Business Report 2020" shows that China's business environment in 2019 jumped to the 31st place in the world. Significant improvements in many of these indicators benefit from the explorations of FTZs. In previous trade policy reviews towards China since 2014, WTO has made positive comments on the establishment of FTZs.

Case study: Establishment of a New Area in Shanghai Free Trade Zone

On August 6, 2019, the State Council issued the Framework Plan for the New Lingang Area (Shanghai)

① Briefing by the Ministry of Commerce on the attraction of foreign investment throughout the country in the first eleven months this year, December 17, 2019

（以下简称《方案》）。《方案》指出，要对标国际上公认的竞争力最强的自由贸易园区，选择国家战略需要、国际市场需求大、对开放度要求高但其他地区尚不具备实施条件的重点领域，实施具有较强国际市场竞争力的开放政策和制度，加大开放型经济的风险压力测试，实现新片区与境外投资经营便利、货物自由进出、资金流动便利、运输高度开放、人员自由执业、信息快捷联通，打造更具国际市场影响力和竞争力的特殊经济功能区，主动服务和融入国家重大战略，更好服务对外开放总体战略布局。《方案》明确，到 2025 年，新片区将建立比较成熟的投资贸易自由化便利化制度体系，打造一批更高开放度的功能型平台，区域创造力和竞争力显著增强，经济实力和经济总量大幅跃升；到 2035 年，建成具有较强国际市场影响力和竞争力的特殊经济功能区，形成更加成熟定型的制度成果，打造全球高端资源要素配置的核心功能，成为我国深度融入经济全球化的重要载体。

（四）金融业市场准入限制显著放宽

市场的互联互通与双向开放，是我国金融业近年来开放的重点。2019 年 5 月 1 日，银保监会公布银行保险业对外开放 12 条的新措施，其中，包括取消外资来华设立外资法人银行、入股信托公司、经营保险经纪公司等总资产上亿美元的要求；放宽中外资投资设立消费金融公司准入政策；取消外资银行开办人民币业务审批等，还在多条措施中强调内外资一致原则。这 12 条对外开放新措施有两个明显特点：一是取消外资来中国投资入股相关金融机构的总资产规模限制，给中小外资金融公司进入国内市场带来机会；二是强调了内外资一致原则。7 月 20 日，国务院金融稳定发展委员会办公室宣布了一系列金融业进一步对外开放的政策措施，被业界称为金融开放“新 11 条”，涉及银行、证券、保险、基金、期货、信用评级等多个领域，相关领域或进一步放宽准入限制，或将开放时点前移，开放的步伐不断加快，彰显了我国金融业对外开放“宜快不宜慢、宜早不宜迟”的坚定决心。

资本市场一直以来都是我国金融业开放的排头兵。过去几年，我国资本市场双向开放中，港交所与内地交易所在监管机构的支持下搭建了三座互联互通的“大桥”——沪港通、深港通、债券通，为内地资本市场的双向开放打通了新的渠道，成为我国资本市场开放的里程碑，从而为国际资本市场投资者全面拥抱中国资本市场开启了新征程。2019 年以来，我国资本市场对外开放取得重要进展。3 月 1 日，摩根士丹利资本国际公司（MSCI）决定，将现有大盘 A 股在 MSCI 全球基准指数中的纳入因子由 5% 提高至 20%。

Pilot Free Trade Zone (hereinafter referred to as the "Plan"). The Plan points out that it is necessary to target the internationally recognized, most competitive free trade parks; select key areas which is crucial to national strategies, bears great demands from international market, and has high demands for openness while their surrounding areas are not eligible; implement an open policy and system with strong competitiveness in the international market; increase the risk stress test for an open economy; facilitate the operation of foreign investment and the new area; enable the free entry and exit of goods, the convenient flow of funds, the high degree of openness of transportation, the free practice of personnel, and the rapid connection of information; so as to create a special economic functional area with more influence and competitiveness in the international market; take the initiative to serve and integrate into the major national strategies to thus better serve the overall strategic layout of opening up strategy to the outside world. The Plan has made it clear that by 2025, the new area should establish a relatively mature system of investment and trade liberalization and facilitation, create a number of functional platforms with a higher degree of openness, and significantly enhance regional creativity and competitiveness. The economic strength and the total economic output have jumped by a large margin; By 2035, the area should build special economic functional areas with strong influence and competitiveness in the international market, form more mature and finalized institutional achievements, and complete the core functions of the allocation of high-end resources in the world, and thus become an important carrier for China to integrate deeply into economic globalization.

iv. Financial market access restrictions significantly relaxed

The inter-connectivity and two-way opening of the market is the focus of the opening of China's financial industry in recent years. On May 1, 2019, China Banking and Insurance Regulatory Commission announced 12 new measures on further opening up the country's banking and insurance sectors, including: cancelling a requirement for foreign banks to have USD 10 billion in assets before being allowed to set up foreign-funded legal person banks, hold stakes in trust firms and operate insurance brokerage companies in China, relaxing the market access policies for Chinese and foreign investments in the establishment of consumer finance companies; removing approval procedures for foreign banks to conduct renminbi business, and emphasizing the principle of consistency between domestic and foreign capital. The 12 new regulations on greater opening up of the financial markets have two distinct characteristics: firstly, the regulations remove the restriction on the total assets of relevant financial institutions for foreign investors to invest in China, thus bringing opportunities for small and medium-sized foreign financial companies to tap into the Chinese market; secondly, they emphasize the principle of consistency between domestic and foreign investment. On July 20, the Office of the Financial Stability and Development Board of the State Council announced a series of policies and measures for the greater opening up of the financial industry, which is known as the New 11 Regulations on the opening up of the financial markets. That covers banking, securities, insurance, funds, futures, credit rating and other areas; related areas may further get relaxation on market access restrictions, or move forward their opening time. Obviously, the pace of opening up will continue to accelerate. It shows the firm determination that China's financial industry should be opened to the outside world "fast rather than slow, early rather than late".

The capital market has always been the vanguard in the opening up of China's financial industry. In the past few years, during the two-way opening up of China's capital markets, the Hong Kong Stock Exchange and the mainland stock exchanges, with the support of regulators, have built three "bridges" for connectivity-the Shanghai-Hong Kong Stock Connect, the Shenzhen-Hong Kong Stock Connect and the Bond Link. It has opened a new channel for the two-way opening of the mainland capital market, and has become a milestone in the opening of China's capital market, so that international capital market investors have embarked on a new journey to fully embrace China's capital markets. Since 2019, important progress has been made in the opening up of China's capital market to the outside world. On March 1, Morgan Stanley Capital International (MSCI) decided to increase the inclusion of existing A-shares in the MSCI global benchmark index from 5%

4 月 22 日，上交所与日本交易所集团签署了中日交易型开放式指数基金（ETF）互通协议。5 月 23 日，东京证券交易所宣布，已批准中日交易型开放式指数基金互通项目下的首批基金。5 月 25 日，全球第二大指数公司富时罗素正式公布了 A 股“入富”股票名单。6 月 17 日，中国证监会与英国金融行为监管局联合发布公告，正式启动沪伦通。而沪伦通的正式启动，更是被业界称之为“资本市场开放的里程碑”。与此同时，政策层面也进一步传递出扩大资本市场开放的明确信号。在 6 月 13 日召开的第 11 届陆家嘴论坛上，国务院副总理刘鹤以及金融管理部门的主要领导，均高度强调“全面提升资本市场双向开放的水平”，并宣布了包括推动修订合格的境外机构投资者 / 人民币合格境外机构投资者（QFII/RQFII）制度规则在内的一揽子开放举措。坚定推动国内资本市场对外开放，不仅会倒逼我国资本市场的制度建设、投资理念、发育程度等持续完善和提升，还会促进我国资本市场逐渐走向成熟，不断提升国际影响力。

（五）“一带一路”成为我国对外开放新空间

中国提出的共建“一带一路”倡议不仅为世界各国发展提供了新机遇，也为中国对外开放开辟了新天地。2019 年 4 月 26 日，第二届“一带一路”国际合作高峰论坛在北京正式开幕，来自 150 多个国家和 90 多个国际组织的各界嘉宾共赴盛会，国家主席习近平在开幕式上发表的题为《齐心开创共建“一带一路”美好未来》的主旨演讲，向全世界传达了中国促进更高水平开放的方向和决心。

6 年来，“一带一路”倡议从理念转化为行动，从愿景转变为现实，为实现世界经济发展繁荣注入推动力量的同时，也正在成为中国对外开放开辟了新空间。如今，“一带一路”建设正从谋篇布局的“大写意”转入精耕细作的“工笔画”阶段，中国正以共建“一带一路”为契机，搭建国际贸易和投资的新平台，以实现更高水平的对外开放。在中美贸易摩擦和全球经济放缓的复杂背景下，海关总署公布的数据显示，“一带一路”在开拓对外市场方面效果显著，正在成为中国新一轮对外开放的增长点，2019 年 1-10 月，中国“一带一路”沿线国家合计进出口 7.47 万亿元，增长 9.4%，高出全国外贸整体增速 7 个百分点，占我国外贸总值达到 29.1%。与此同时，中国对“一带一路〞沿线国家投资合作积极推进。商务部公布的数据显示，2019 年 1-10 月，我国企业对“一带一路”沿线的 56 个国家新增投资 114.6 亿美元，占同期总额的 12.7%；在“一带一路”沿线国家新签对外承包工程合同额 1121.7 亿美元，占同期总额的 63.5%；完成营业额 635.3 亿美元，占同期总额的 55%。

to 20%. On April 22, the Shanghai Stock Exchange and the Japanese Exchange Group signed an agreement on the exchange of ETF, a Sino-Japanese trading index fund. On May 23, the Tokyo Stock Exchange announced that it had approved the first batch of funds under the Sino-Japanese trading open-end index fund exchange project. On May 25, FTSE Russell, the world's second-largest index company, officially announced a Rich list of A-shares. On June 17, the China Securities Regulatory Commission and the UK Financial Conduct Regulatory Authority issued a joint announcement to officially launch the Shanghai Stock Connect. The official launch of the Shanghai Stock Connect has been called a Milestone in the Opening of the Capital Market by the industry. At the same time, the relevant policies also further conveyed a clear signal to expand the opening of the capital market. At the 11th Lujiazui Forum held on June 13, Vice Premier Liu He and the main leaders from the financial management departments all attached great importance to “Raising the Level of Two-way Opening up of the Capital Market in an All-round Way”. They also announced a package of opening-up measures, including those promoting the revision of the rules of the qualified Foreign Institutional Investor / renminbi qualified Foreign Institutional Investor (QFII/RQFII) system. It was also pointed out that firmly promoting the opening of the domestic capital market to the outside world will not only force the continuous improvement and promotion of the system construction, investment concept and development degree of China's capital market, but also facilitate the gradual maturity of China's capital market and enhance its international influence.

v.The Belt and Road Initiative becomes a new ground for China's opening to the outside World

The Belt and Road Initiative put forward by China has not only provided new opportunities for the development of all countries in the world, but also opened up a new ground for China's opening up to the outside world. On April 26, 2019, the Second Belt and Road Forum for International Cooperation for officially opened in Beijing. Guests from more than 150 countries and 90 international organizations attended the event. President Xi Jinping's keynote speech entitled "Working Together to Create a Better Future for Belt and Road Initiative" at the opening ceremony conveyed to the world China's direction and determination to promote a higher level of opening up.

Over the past six years, the Belt and Road Initiative has been transformed from concept to action, from vision to reality, and has also opened up a new ground for China to open up to the outside world while injecting impetus into the realization of world economic development and prosperity. Today, the construction of Belt and Road Initiative is changing from “freehand brushwork” to “meticulous painting”. China is taking the co-construction of Belt and Road Initiative as an opportunity to build a new platform for international trade and investment, in a bid to achieve a higher level of opening up to the outside world. Against the complex background of Sino-US trade frictions and the global economic slowdown, data released by the General Administration of Customs shows that Belt and Road Initiative has achieved remarkable results in opening up to the outside world, and is becoming the growth point of China's new round of opening up to the outside world. In From January to October 2019, China's Belt and Road Initiative countries totaled RMB 7.47 trillion in imports and exports, an increase of 9.4%, 7 percentage points higher than the overall growth rate of the country's foreign trade, accounting for 29.1% of the total value of China's foreign trade. At the same time, China has actively promoted investment cooperation among countries along the Belt and Road Initiative route. According to data released by the Ministry of Commerce, from January to October 2019, Chinese enterprises invested USD 11.46 billion in 56 countries along the Belt and Road Initiative route, accounting for 12.47% of the total in the same period. Countries along the Belt and Road Initiative route signed new contracts for foreign contracted projects worth USD 112.17 billion, accounting for 63.5% of the total in the same period, and completed a turnover of USD 63.53 billion, accounting for 55% of the total in the same period.

三、社会信用体系建设成果显著

2019 年，我国社会信用法律法规不断完善，失信惩戒力度不断加大，受到企业的普遍认可。贸促会企业问卷调查显示，社会信用环境总体评价较高，在 12 个一级指标中排第 3，高于营商环境总体评价。

（一）第一次从全国层面推出信用监管政策性文件

2019 年，我国建立健全信用法律法规体系步伐明显加快。7 月 16 日，国务院办公厅发布《关于加快推进社会信用体系建设构建以信用为基础的新型监管机制的指导意见》（以下简称《意见》），明确要完善法人和非法人组织统一社会信用代码制度，以统一社会信用代码为标识，整合形成完整的市场主体信用记录。《意见》是党的 18 大后，第一次从全国层面推出信用监管政策性文件，提出了“13+9”共计 22 条创新性举措，即 13 条含金量高、操作性强、全面覆盖事前事中事后全监管环节的具体举措和 9 条有效支撑信用监管深化落实的保障性举措。

（二）建立了全球规模最大的征信系统

我国征信体系建设起步于 2006 年，是从设立央行征信中心开始的。2019 年，央行宣布完成对中电联（北京）征信、爱信诺征信以及归属于天眼查的北京金堤征信 3 家机构的企业征信业务经营备案，这是央行企业征信备案通道关闭三年后首次重启。此外，央行近年来还联合相关部门先后出台了外商投资企业设立企业征信机构和信用评级机构的政策规定和监管要求。外资企业征信机构和信用评级机构加快进入中国市场，美国邓白氏、英国益博睿等国际企业征信巨头在华设立子公司，美国标普、惠誉、穆迪三大评级机构也分别在北京注册独资法人评级机构。

目前，我国已建立了全球规模最大的征信系统。征信系统累计收录 9.9 亿自然人、2591 万户企业和其他组织的有关信息，个人和企业信用报告日均查询量分别达 550 万次和 30 万次[①]。截至 2019 年 6 月末，在人民银行各地分支机构备案的企业征信机构 130 家，资产规模达到 85.4 亿元，从业人员达到 1 万多人，仅 2019 年上半年就对外提供企业信用报告、企业信用评分、企业信用画像、企业身份验证等各类征信产品和服务 22 亿次；130 家备案企业征信机构中大部分企业征信机构都实现了企业注册信息、司法判决信息、上市公司财务信息的全面采集和实时更新，有的征信机构还通过与政府部门、公用事业

① 中国已建立全球规模最大征信系统 将扩大征信行业对外开放 - 中国新闻网，2019-06-14

III.Remarkable achievements in the construction of social credit system

In 2019, the laws and regulations on social credit system in China have been continuously improved, and the punishment for breach of credit has continued to strengthen, which has been widely recognized by enterprises. According to CCPIT’s questionnaire survey, the overall evaluation of social credit environment is high, ranking third among the 12 first-level indicators, which is higher than the overall evaluation of business environment.

i. The first national-level policy document on credit supervision

In 2019, the pace of establishing and perfecting the system of credit laws and regulations in China has been obviously accelerated. On July 16, the General Office of the State Council issued the Guiding Opinions on Accelerating the Construction of a Social Credit System and Constructing a New Credit-based Supervision Mechanism (hereinafter referred to as the Guiding Opinions). It is specified that efforts should be made to improve the unified social credit code system of legal persons and non-legal organizations, take the unified social credit code as the symbol, and form a complete credit record of the main body of the market through integration. The Guiding Opinions is the first policy document on credit supervision that has been launched at the national level since the 18th CPC National Congress, and a total of 22 innovative measures, which is“13+9”, have been put forward. That is, 13 specific measures with high practicality, strong maneuverability and comprehensive coverage of the whole supervision link (before event, in-event and after-event supervision) and 9 safeguard measures to effectively support the further implementation of credit supervision.

ii. The world’s largest credit information system has been established

The construction of credit information system in China started in 2006, which began with the establishment of the central bank credit information center. In 2019, the central bank announced the completion of the business record of the credit information business of the China Power Union (Beijing), the Aicino credit investigation and the Beijing Jindi credit investigation under Tianyancha.com. This is the first time that the central bank enterprise credit filing channel has been reopened after it was closed for three years. In addition, in recent years, the central bank, together with relevant departments, has successively issued policies, regulations and regulatory requirements for foreign-invested enterprises to set up credit information agencies and credit rating agencies. Credit information agencies and credit rating agencies of foreign-funded enterprises have accelerated their entry into the Chinese market, and international credit information giants such as Dun and Bradstreet (the United States) and Experian (the United Kingdom) have set up subsidiaries in China. The three major rating agencies, S & P, Fitch and Moody's, have also registered wholly owned corporate rating agencies in Beijing.

At present, China has established the largest credit information system in the world. The credit information system contains a total of 990 million natural persons, 25.91 million enterprises and other organizations. The average daily enquiries of individual and corporate credit reports reached 5.5 million and 300,000 respectively[a]. By the end of June 2019, there were 130 corporate credit information institutions filing their records in various branches of the people's Bank of China, with assets reaching RMB 8.54 billion and more than 10, 000 employees. Only in the first half of 2019, it provided 2.2 billion times of credit information products and services, such as enterprise credit report, enterprise credit score, enterprise credit portrait, enterprise identity verification and so on. Most of the 130 enterprise credit information institutions have realized the comprehensive collection and real-time updating of enterprise registration information, judicial decision information and financial information of listed companies. Some credit information agencies have also established special lines with government departments and public utilities, and established data cooperation with large Internet trading platforms, and so

① China has established the world’s largest credit information system. China will further expand the opening-up of the credit industry—Chinanews.com, June 14, 2019

单位建立专线，与大的互联网交易平台建立数据合作等，采集了 800 多万户企业的进出口信息、400 多万户企业的税务信息、300 多万户企业的商业交易信息等[①]。

（三）失信惩戒力度不断加强

我国社会信用体系建设综合运用了经济、法律、道德、科技和行政等多种手段进行加强和创新，通过完善失信被执行人信用监督和信用惩戒机制化解执行难问题，金融、医药卫生、劳动关系、环境保护等多个领域的社会信用体系建设取得重大进展，“一处失信，处处受限”的联合惩戒格局不断完善。截至 2019 年 7 月底，各部门共签署 51 个联合奖惩备忘录。其中，联合惩戒备忘录 43 个，联合激励备忘录 5 个，既包括联合激励又包括联合惩戒的备忘录 3 个[②]。国家税务总局 7 月 23 日发布数据显示，上半年全国税务机关累计公布税收违法“黑名单”案件 7282 件，同比增长 161.85%，新增纳入“黑名单”的走逃（失联）案件 222 件；在推进联合惩戒工作方面，从 2015 年启动至 2019 年 6 月，全国税务机关累计推送多部门联合惩戒 31.49 万户次，其中公安部门配合阻止出境 5773 人次，1.98 万名“黑名单”当事人被市场监督管理部门限制担任企业的法定代表人、董事、监事及经理职务；在落实信用修复制度方面，上半年有 183 户“黑名单”当事人通过主动缴清税款、滞纳金和罚款后被撤出公布[③]。

四、通关便利化水平进一步提升

近年来，我国口岸管理改革力度空前，通过优化流程、简化单证等方式，切实推动实现口岸提效降费，有效提升了我国口岸营商环境。根据 2019 年贸促会企业问卷调查数据，口岸服务环境评价高达 4.48 分，在 12 个一级指标中居一级指标首位；其中，货物通关评价最高，为 4.5 分；大部分行业较满意及以上企业占比均超九成。

（一）进一步简化通关手续，优化流程

1. 通关流程进一步优化。2018 年，机构改革进一步促进口岸部门职能优化，海关与检验检疫业务全面融合，实现了申报单证、作业系统、风险研判、指令下达和现场执法的“五统一”。改革后，原报关、报检共 229 个申报项目合并精简至 105 个。2019 年 8

① 推动企业征信市场高质量发展 - 光明日报，2019-08-04
② 国家公共信用信息中心发布 7 月份新增失信联合惩戒对象公示及公告情况说明 - 国家公共信用信息中心，2019-08-02
③ 上半年全国累计公布税收违法“黑名单”案件 7282 件 - 新华网，2019-07-23

on, collected the import and export information of more than 8 million enterprises, the tax information of more than 4 million enterprises, the business transaction information of more than 3 million enterprises[a].

iii. The intensity of punishment for breach of trust has been continuously strengthened

The construction of China's social credit system has been strengthened and innovated itself with comprehensive use of economic, legal, moral, scientific and technological, administrative and other means, and to solve the problem of difficult in enforcement by perfecting the credit supervision for the defaulters and the credit punishment mechanism. Great progress has been made in the construction of social credit system in many fields, such as finance, medicine and health, labor relations, environmental protection, and so on. The joint punishment pattern of "if one lose his credit for one time, he will lose it for the whole life" has been continuously improved. By the end of July 2019, a total of 51 joint memorandums of rewards and punishments had been signed by various departments. Among them, there are 43 joint disciplinary memorandums and 5 joint incentive memorandums. There are 3 memorandums of understanding, including both joint incentives and joint punishment[b][National Center for Public Credit Information released a list of new dishonest persons subject to joint punishment and a in July7 and a relevant explanation notice-- National Center for Public Credit Information, August 2, 2019.]. According to data released by the State Administration of Taxation on July 23, in the first half of the year, tax authorities across the country published a total of 7,282 "blacklist" cases of tax violations, an increase of 161.85% over the same period last year; 222 new cases of escape (missing) included in the "blacklist". In promoting joint disciplinary work, from 2015, which it was started, to June 2019, tax authorities across the country pushed a total of 314,900 cases of multi-departmental joint punishment, of which public security departments cooperated to prevent 5,773 people from leaving the country, and 19,800 "blacklisted" parties are restricted by the market supervision and administration department from holding the posts of legal representatives, directors, supervisors and managers of the enterprise; in the implementation of the credit repair system, 183 "blacklisted" parties were withdrawn from the list in the first half of the year after taking the initiative to pay taxes, late fees and fines[c].

IV.Customs clearance facilitation is further improved

In recent years, China has intensified port administration reform unprecedentedly, optimized the flow and simplified the documents to really improve port efficiency and reduce relevant costs, effectively uplifting port business environment. According to the data from questionnaire survey on enterprises by CCPIT in 2019, port service environment was given 4.48 scores, ranking No.1 of the 12 Class A indicators, of which, 4.5 scores were given to the evaluation on customs clearance. Over 90% of enterprises in most industries expressed satisfaction or higher satisfaction.

i. China further simplifies the customs clearance

1. The customs clearance flow is further optimized. In 2018, the institutional reform further optimized functions of departments of ports, customs and inspection and quarantine business were integrated completely, and the works in five aspects of declaration documents, operation system, risk judgment, order issue and site enforcement were unified. After the reform, former 229 items in customs declaration and inspection were merged

① To promot the high-quality development of the business credit market—Guangming Daily, August 4, 2019
② National Center for Public Credit Information released a list of new dishonest persons subject to joint punishment and a in July7 and a relevant explanation notice-- National Center for Public Credit Information, August 2, 2019.
③ A total of 7,282 “blacklist” cases in violation of tax laws and regulations were reported in the first half of this year—Xinhuanet, July 23, 2019.

月起，海关实施的进口概要申报、完整申报的“两步申报”改革试点反映，这项举措既有效降低了企业在申报过程中的风险，又保障了企业权益、降低了企业成本，还可以促进政府部门精准监管、提升效率。

2. 进出口单证进一步简化。近年来，海关总署会同口岸管理各相关部门，大力简化进出口环节的监管证件和随附单证，到目前为止，进出口环节需要监管的证件由 86 种减少到 46 种；在 46 种证件中，除了有 4 个证件有保密特殊需要、不能联网以外，其他 42 种都已经实现了联网核查、自动比对。2019 年 1 月开始，商务部和海关总署发布公告，取消了 15 类共 118 项商品的自动进口许可证。6 月起，海关总署和国家外汇局全面取消了报关单收、付汇证明联和办理加工贸易核销的海关核销联；7 月又出台两个简化证件的措施，一是将两种进口环节的监管证件退出口岸的验核，改由通关环节来进行自动比对；二是将 5 个进出口环节的监管证件通过实行网上办理、网上申报来简化它的手续。到 2019 年年底，除了有保密需要的几个证件以外，进出口环节监管证件有望提前一年实现国务院《优化口岸营商环境促进跨境贸易便利化工作方案》提出的“全面网上申报，网上办理”的目标。

（二）口岸收费进一步降低

为推动降低进出口环节的合规成本，2018 年起，中国政府成立了清理口岸收费工作领导小组，统筹推进口岸降费工作并取得积极成效。一是推进进出口环节收费公示，实行口岸收费明码标价。透明阳光的收费价格倒逼经营服务企业收费合理化。二是压减收费项目，降低部分政府定价、政府指导价的收费标准。港口经营服务型收费项目，由 15 项压减到 11 项。2019 年 4 月 1 日起，货物港务费、港口设施保安费的汇率标准分别下调了 15% 和 20%。三是依法查处各类违规违法的收费行为，公开曝光了 8 起港口航运环节违规收费的案件。四是积极引导相关经营服务型的企业降低收费。2019 年 3 月 20 日起，中远海运、马士基等 62 家船公司主动公示下调码头操作费等一系列的费用，较之前降低了 5% 到 10%。4 月 1 日起，全国范围内港口设施保安费下调 20%、货物港务费下调 15%[①]。2019 年 9 月底前，相关部门开展了进出口环节收费的专项督察，依法依规查处违规收费行为，对涉嫌垄断的口岸经营服务性单位和企业进行调查，增强了进出口企业的获得感。同时，海关总署在全国试点开展关税保证保险，并将其扩大至汇总征税和循环担保环节，有效压缩企业通关时间、减轻企业负担。目前，已有 1463 家企业参与试点，累计购买保单 10306 份，保险金额 339.6 亿元[②]。

①② 全国海关聚焦企业关切——不断提升跨境贸易便利化水平 – 经济日报，2019-05-05

and cut down to 105. The pilot in the reform of "2-step declaration" for import-related brief declaration and complete declaration by the customs from August 2019 was reported to effectively reduce risks of enterprises in the process of declaration, guarantee enterprises' rights and interests, decrease enterprises' costs and promote precise supervision and higher efficiency of government departments.

2. Import and export documents are further simplified. In recent years, the General Administration of Customs and all port management departments have made great efforts to simplify relevant supervision certificates and associated documents in import and export. By far, the certificates previously necessary for import and export have been reduced to 46 from 86. Of the 46 certificates, 42 have been available online for check and automatic comparison except for 4 due to special need of confidentiality. From January 2019, the Ministry of Commerce and the General Administration of Customs made a proclamation, cancelling the licenses for automatic import of 118 kinds of commodities under 15 categories. The General Administration of Customs and the State Administration of Foreign Exchange completely cancelled the slips of exchange receipt and payment under customs declaration and of customs verification for processing trade from June; and mapped out two certificate simplification measures in July: one is the change from verification of the withdrawal from port of two supervision certificates for import to automatic comparison during customs clearance, the other is the practice of online handling and declaration of 5 supervision certificates for import and export to simplify relevant formalities. By the end of 2019, the goal of "Complete Online Declaration and Handling" proposed in the Work Plan of the State Council for Optimizing Port Business Environment to Enhance Cross-border Trade Facilitation will be realized for the import and export supervision certificates one year in advance except for several certificates subject to confidentiality.

ii. Charges at ports are further reduced

In order to reduce compliance cost in import and export, the Chinese government established the leading group for checking charges at ports in 2018 to reduce such charges in a concerted manner and had some active success by taking the following measures: firstly, public announcement of charges in import and export and clearly-marked price for the charges. Transparent price promoted more reasonable charges on service enterprises in turn. Secondly, streamlining charge items and lowering some charge levels subject to government pricing and government guidance price. Correspondingly, port service charge items were reduced to 11 from 15. From April 1, 2019 on, the exchange rate for harbor charge for cargo and port facilities security charge were reduced by 15% and 20%, respectively. Thirdly, efforts were made to investigate and handle various charging behaviors against regulations and laws according to law, and publicly exposed 8 cases of charging against laws in port shipping. Fourthly, active works were done to guide relevant service enterprises to reduce charges. From September 30, 2019, 62 shipping companies including COSCO and Maersk offered lower prices for a series of items such as terminal operation fee through public announcement, down by 5%-10%. From April 1 on, the port facilities security fee was reduced by 20% and the harbor charge for cargo was lowered by 15% around China[a]. By the end of September 2019, relevant departments conducted special supervision of charges in import and export, investigated and handled charging behaviors against regulations according to law, and investigated port service units and enterprises being suspected of monopoly, enhancing the sense of gain of import and export enterprises. Meanwhile, the General Administration of Customs carried out pilot of customshouse bonds insurance around China, and expanded it to consolidated tax and revolving guarantee, effectively shortening the time of customs clearance of and alleviating the burden on enterprises. By far, 1,463 enterprises have participated in the pilot and arranged 10,306 insurance policies cumulatively, with the insurance amount up to RMB 33.96 billion[b] .

①② Customs around China Focus on Concerns of Enterprises——Keep Improving the Level of Cross-border Trade Facilitation-Economic Daily, May 5, 2019

（三）“单一窗口”建设取得新进展

作为国际上促进贸易便利化、改善口岸营商环境的重要举措，国际贸易“单一窗口”建设2019年来取得显著成绩。一是国际航行船舶通过“单一窗口”申报全面实现了“一单多报”，通过“单一窗口”等信息平台向进出口企业、口岸作业场站推送查验通知，增强通关时效的可预期性，让企业的作业安排做到了“心中有数”和“了如指掌”。二是海关总署（国家口岸管理办公室）牵头建设的中国国际贸易“单一窗口”标准版在北京、上海、天津、浙江、安徽、福建（含厦门）、广东（含深圳）、海南等地区开展金融保险服务功能试点。建设银行作为首批试点银行，通过“单一窗口”可为客户提供预约开户、汇入汇款、汇出汇款、结售汇、“跨境快贷－退税贷”等金融服务。三是海关总署会同18个部门共同推进的“单一窗口”标准版将通关流程由串联改为并联，解决了企业多头申报和重复申报的问题，实现了一点接入、一次提交、一次查验、一键跟踪、一键办理，有效降低了通关成本，缩短了通关时间，减轻了企业负担。目前，国际贸易“单一窗口”已经实现了与25个部委系统对接和信息共享，上线运行68个部门之间的联网合作项目，为企业提供的服务事项达到495项，业务覆盖了全国所有口岸，基本上满足了企业的“一站式”作业要求；主要业务应用中货物申报已经达到了100%，舱单申报和运输工具申报也都也达到了90%，到年底要实现这三项主要业务应用率都达到100%的目标。

五、知识产权保护全面加强

近年来，中国加大知识产权保护力度，重视知识产权立法与执法，知识产权保护工作取得明显成效。2019年贸促会企业问卷调查数据显示，受访企业对知识产权保护环境总体评价良好（4.321分），高于营商环境总体评价；与2018年相比，2019年受访企业对知识产权总体评价有所提升。

（一）知识产权保护制度体系不断完善

近年来，为严格知识产权保护，加大知识产权保护，有关部门在陆续制定出台并多次修订完善商标法、专利法、著作权法、反不正当竞争法等法律法规的基础上，不断完善知识产权法律制度，健全侵权惩罚性赔偿制度，重点加大侵权行为惩处力度，显著提高了违法成本。表4-1是中国政府有关部门近年出台的相关法律法规。目前，我国已经加入了几乎所有主要的知识产权国际公约，建立起了门类较为齐全的知识产权法律法规，全面履行知识产权保护职责。

iii. Further progress is made in building "single window"

As an important measure for promoting trade facilitation and improving the port business environment worldwide, the work of "Single Window" for international trade has made the following remarkable achievements since 2019. Firstly, currently ships for international voyage can enjoy "one bill for multiple declarations" through the "Single Window" completely, and deliver inspection notices to import and export enterprises and port operation yards and stations through relevant information platforms such as the "Single Window", enhancing the expectability of customs clearance time efficiency and making enterprises "know what's what" of and "know through and through" the operation arrangement. Secondly, the standard-edition "Single Window" for international trade of China built under the leadership of the General Administration of Customs(National Office of Port Administration) has been used for pilot of financial and insurance service functions in Beijing, Shanghai, Tianjin, Zhejiang, Anhui, Fujian (including Xiamen), Guangdong (including Shenzhen) and Hainan. China Construction Bank, as one of the first-batch pilot banks, can now provide customers with financial services of opening accounts by reservation, inward remittance, outward remittance, exchange settlement and sale and "cross-border easy loan and tax-rebate loan". Thirdly, the standard-edition "Single Window" jointly driven by the General Administration of Customs and other 18 departments changed the serial flow into the parallel one, solving the problem of multiple declarations and repetitive declarations of enterprises, realizing one-point access, once submittal, once check, one-key tracing and one-key handling, effectively cutting down customs clearance cost, shortening customs clearance time and alleviating burdens on enterprises. At present, the "Single Window" for international trade has realized system connection and information sharing with 25 ministries and commissions, operated the networked cooperation projects among 68 departments online, provided enterprises with 495 services, and expanded businesses to all ports in China, basically meeting the "one-stop" operation demands of enterprises. Of the main business applications, cargo declaration with the Single Window has reached 100% and manifest declaration and conveyance declaration 90%, and the application rate in the 3 major businesses will achieve 100%.

V.IPR protection is enhanced in an all-round manner

In recent years, China has intensified IPR protection, attached importance to IPR legislation and law enforcement, and achieved remarkable success in IPR protection. The data from the questionnaire survey on enterprises by CCPIT in 2019 showed that the enterprises surveyed generally give good evaluation on the IPR protection environment (4.32 scores), higher than that on business environment; compared with 2018, the surveyed enterprises' evaluation on IPRs is higher as a whole.

i. The IPR protection system keeps improving

Over the past few years, in order to strictly enforce and intensify IPR protection, on the basis of formulation and revisions of the Trademark Law, the Patent Law, the Copyright Law and the Anti-unfair Competition Law as well as other laws and regulations, relevant departments have made continuous efforts to improve IPR laws and systems and perfect the system of punitive compensation against infringement, with the focus on punishment of infringements, sharply raising law-violation cost. Table 4-1 lists relevant laws and regulations released by relevant departments of the Chinese government in recent years. China has now joined almost all major international treaties on IPRs and established well-covered IPR laws and regulations to comprehensively perform its duties in IPR protection.

我国知识产权事业发展的政策体系和机构设置也在不断完善。2018 年，党的十九届三中全会作出深化党和国家机构改革的决定，通过了《深化党和国家机构改革方案》，为知识产权事业发展作出了很好的顶层设计。当年全国两会后，我国组建了国家市场监督管理总局，重组了国家知识产权局，完善了版权管理体制，不仅实现了商标、专利、原产地地理标志的集中统一管理，也实现了对商标、专利的综合执法。

表 4-1 近两年中国政府颁布的部分知识产权保护法律法规

时间	名称	主要内容
2018年12月5日	国家发改委、人民银行、国家知识产权局等38个部门和单位联合签署了《关于对知识产权（专利）领域严重失信主体开展联合惩戒的合作备忘录》	《备忘录》决定对知识产权（专利）领域严重失信主体开展联合惩戒。
2018年12月23日	十三届全国人大常委会第七次会议审议《专利法修正案（草案）》	《草案》对故意侵犯专利权的行为，规定了一到五倍的惩罚性赔偿，并将法定赔偿额从现行的“一万元以上一百万元以下”提高到“十万元以上五百万元以下”。
2019年4月23日	全国人大常委会审议通过了《商标法修正案》	《商标法修正案》进一步将恶意侵犯商标专用权的赔偿额由一倍以上三倍以下提高到一倍以上五倍以下，并将法定赔偿额的上限从三百万元提高到五百万元，修改条款自2019年11月1日起施行。
2019年4月10日	国家知识产权局办公室印发《2019年度全国知识产权系统执法保护专项行动方案》（以下简称《行动方案》）	《行动方案》明确了农村假冒伪劣食品治理、展会知识产权执法保护、电子商务领域知识产权执法保护、民营企业知识产权保护、涉外商标专利侵权案件等五大年度工作重点。
2019年6月11日	国家知识产权局印发《推动知识产权高质量发展年度工作指引（2019）》和“2019年推动知识产权高质量发展任务清单”	《指引》明确到2019年底，我国将进一步提升知识产权创造质量、保护效果、运用效益、管理水平、服务能力和国际影响力，初步搭建适应知识产权高质量发展的指标体系、政策体系和统计体系，同时，从7方面确定18项具体重点任务，并对三类强省设置差异化工作要求，明确了必做选做任务，进一步突出重点任务的针对性和可操作性。
2019年7月24日	中央全面深化改革委员会通过审议《关于强化知识产权保护的意见》	《意见》清晰阐明中国依法严格保护知识产权的坚定立场和鲜明态度，为中国在新时代改革完善知识产权保护工作体系提供了根本遵循和行动指南。
2019年8月30日	国家知识产权局印发《关于新形势下加快建设知识产权信息公共服务体系的若干意见》	《意见》提出要建立健全便民利民的知识产权信息公共服务体系，强化知识产权信息公共服务体系的支撑保障。
2019年10月8日	国务院常务会议审议通过《优化营商环境条例（草案）》	《条例》强调要建立健全知识产权侵权惩罚性赔偿制度。

China has also kept improving its policy system and organizations for the development of the cause of IPRs. In 2018, the 3rd Plenary Session of the 19th CPC National Congress made the decision on deepening the reform of the Party and state organs and adopted the Plan for Deepening the Reform of the Party and State Organs, making a fine top-down design for the development of the cause of IPRs. After NPC and CCPCC that year, China established the State Administration for Market Regulation, reorganized the National Intellectual Property Administration, perfected the copyright management system and realized not only centralized administration of trademarks, patents and the appellation of origin but also comprehensive law enforcement of trademarks and patents.

Table 4-1 Some Laws and Regulations on IPR Protection Promulgated by the Chinese Government in Recent Two Years

Time	Description	Main Contents
December 5, 2018	*The Memorandum of Cooperation on Joint Punishment of Seriously Dishonest Entities in the Field of Intellectual Property (Patents)*	*The Memorandum* decides to conduct joint punishment of seriously dishonest entities in the field of intellectual property (patent)
December 23, 2018	The 7th Session of the Standing Committee of the 13th National People's Congress deliberated the *Amendment to the Patent Law (Draft)*	*The Draft* stipulates 1-5 times of punitive compensation against the behavior of intentional infringement on patent rights, and raises the legal amount of compensation to "higher than RMB 100,000 but lower than RMB 5 million" from existing "higher than RMB 10,000 but lower than RMB 1 million".
April 23, 2019	The Standing Committee of the National People's Congress deliberated and adopted the *Amendment to the Trademark Law*	The *Amendment to the Trademark Law* further raises the amount of compensation against malicious infringement on exclusive use of trademark to the level of higher than 1 times but lower than 5 times from the previous level of higher than 1 times but lower than 3 times, and uplifted the upper limit of the legal amount of compensation to RMB 5 million from RMB 3 million. The revised articles shall come into force from November 1, 2019.
April 10, 2019	The Office of the National Intellectual Property Administration issued the *Special Action Plan for Law Enforcement and Protection in National IPR System in 2019* (hereinafter referred to as the *Action Plan)*.	The *Action Plan* clarifies five annual focuses of work in control of counterfeit and poor-quality food in rural area, IPR enforcement and protection in exhibition, E-commerce field and private enterprises and foreign trademark patent infringement cases.
June 11, 2019	The National Intellectual Property Administration issued the *Guidance to Annual Work for Driving High-quality Development of IPR (2019)* and the "List of Tasks for Driving High-quality Development of IPRs".	The *Guidance* clarifies that by the end of 2019, China will witness further improvement of IPR creation quality, protection effect, application benefits, management level, service capability and international influences, and establish initial indicator system, policy system and statistical system suitable for high-quality development of IPRs. Meanwhile, the *Guidance* also defines 18 specific key tasks in 7 aspects, sets differential work requirements for 3 kinds of powerful provinces, clarifies compulsory and selective tasks and further highlights the specificity and operability of key tasks.
July 24, 2019	The Central Committee for Deepening Overall Reform deliberated and adopted the *Opinions on Strengthening the IPR Protection*.	The *Opinions* clearly clarifies China's firm stand and clear-cut attitude to strictly protect IPRs, and prepares the fundamental guideline and guide to action for China to reform and perfect IPR protection system in the new era.
August 30, 2019	The National Intellectual Property Administration issued the *Several Opinions on Speeding up the Public Service System of IPR Information under the new Situations*.	The *Opinions* proposes establishing and perfecting the public service systems of IPR information for convenience and benefit of the public, and strengthening the guarantee of support to the system.
October 8, 2019	The executive meeting of the State Council deliberated and adopted the *Regulations on Optimizing Business Environment (Draft)*.	The Regulation emphasizes establishing and perfecting the punitive compensation against IPR infringement.

（二）知识产权保护执法力度明显加强

2019 年，中国政府提高采取系列举措，不断加大对侵犯知识产权犯罪的打击力度，中国对知识产权的保护在较短时间里有了很大进步。

1. 加强行政司法保护，加强执法指导。持续开展执法专项行动，严厉打击知识产权侵权假冒行为。不断加强执法指导工作，统一执法标准，规范执法流程，联合挂牌督办大要案件。2019 年上半年，全国地方人民法院审结知识产权民事一审案件 15 万余件，同比上升约 80%；审结侵犯知识产权罪一审案件 2000 余件，同比上升约 23%；全国检察机关共批准逮捕涉及侵犯知识产权犯罪案件 1900 余件、3400 余人；1-5 月，全国公安机关共破获侵权假冒犯罪案件 4200 余起，抓获犯罪嫌疑人 9900 余名，涉案价值 48 亿余元[①]。

中国知识产权保护成效得到国内外社会各界的认可。据国家知识产权局调查，知识产权保护社会满意度由 2012 年的 63.69 分提升到 2018 年的 76.88 分。美国商会 2019 年 3 月发布的国际知识产权指数报告指出，中国在网络销售环境改善、药品专利执法等方面的成绩尤其突出；中国欧盟商会 2019 年 5 月发布的 2019 年度《商业信心调查》报告显示，受访的 585 家在华欧盟企业约六成认为中国知识产权行政与司法保护力度明显加强。世界知识产权组织总干事弗朗西斯·高锐表示，中国在知识产权事业的发展道路非同寻常，现在中国已经成为全球知识产权体系的领导者。国家知识产权局公布的数据也显示，2019 年上半年国外在华知识产权的申请量延续了多年以来逐年增长的势头，国外在华发明专利申请量达到 7.8 万件，同比增长 8.6%；国外在华商标申请量为 12.7 万件，同比增长 15.4%。

2. 加强保护能力建设和国际合作，健全保护工作体系。最高法、最高检、公安部等推动相关机构改革，知识产权司法审判和刑事打击体系进一步完善。布局建设一批知识产权保护中心。截至目前，我国共批设知识产权保护中心 24 家，服务范围覆盖新一代信息技术、高端装备制造、生物医药等 17 个重点产业，分布全国 14 个省（市区），其中，17 家通过验收正式投入运行[②]。

加强知识产权海外纠纷应对机制建设，设立国家海外知识产权纠纷应对指导中心。2019 年上半年，全国专利、商标行政执法办案实现综合执法，共查处专利侵权假冒案件 6529 件，查处商标违法案件 1.15 万件[③]。同期，我国共受理复审请求 2.3 万件，同比

① 保护知识产权 中国赢得赞誉 - 人民日报海外网，2019-07-31
②③ 国家知识产权局 2019 年第三季度例行新闻发布会，国家知识产权局网站，2019-07-09

ii. The law enforcement for IPR protection is clearly intensified

In 2019, the Chinese government has taken a series of measures to keep intensifying the fight against the crime of IPR infringement, helping China make a great progress in IPR protection in a short period.

1. Enhancing the protection through administrative and judicial measures and the guidance to law enforcement. China keeps conducting special actions of law enforcement to severely fight against behaviors of any infringement on and counterfeit of IPRs, and makes continuous efforts to enhance the guidance to law enforcement, unify the enforcement standard, standardize the enforcement flow and jointly supervise handling of serious and major cases. In the first half of 2019, local people's courts around China heard and closed more than 150,000 civil first-instance cases of IPRs, up 80% y-o-y, and more than 2,000 first-instance cases of IPR infringement, up 23% y-o-y. The procuratorial organs around China approved arrest of more than 3,400 persons in more than 1,900 cases involving IPR infringement. From January to May, the public security organs around China broke more than 4,200 crime cases of infringement and counterfeit and arrested more than 9,900 suspects involving the case value of more than RMB 4.8 billion[a].

China's progresses in protecting IPRs have been recognized by various social circles both at home and abroad. According to the survey by the National Intellectual Property Administration, the social satisfaction with IPR protection reached 76.88 scores in 2018 from 63.69 scores in 2012. The U.S. Chamber International IP Index released in March 2019 points out, China's achievement in improving online sales environment, drug patent enforcement and others were remarkable particularly. According to the Business Confidence Survey 2019 released by the European Union Chamber of Commerce in China in May 2019, 60% of the 585 EU enterprises in China thought that China clearly enhanced administrative and judicial IPR protection. WIPO Director General Francis Gurry expressed that China took an unusual road in developing the cause of IPRs, and has now become the leader of global IPR system. The data released by the National Intellectual Property Administration also show that in the first half of 2019, foreign IPR applications in China kept the momentum of growth and have lasted for many years, and foreign applications for invention patents in China reached 78,000, up 8.6% y-o-y; and foreign applications for trademarks stood at 127,000, up 15.4% y-o-y.

2. Enhancing works for higher protection capabilities and international cooperation and improving the protection system. The Supreme People's Court, the Supreme People's Procuratorate and the Ministry of Public Security moved ahead with relevant institutional reform, further improved the system of judicial judgment and criminal strike for IPRs and arranged and built a batch of centers for IPR protection. By far, China has established 24 such centers in total, which are distributed in 14 provinces (cities and regions), with the services covering 17 key industries of new-generation information technology, high-end equipment manufacturing and bio-medicine. Of the 24 centers, 17 have passed the acceptance and put into operation officially[b].

Enhancing the mechanism of response to overseas IPR disputes and establishing the national guidance center for response to such disputes. In the first half of 2019, the administrative law enforcement departments for patents and trademarks carried out comprehensive enforcement and totally investigated and dealt with 6,529 cases of infringement on and counterfeit of patents and 11,500 illegal trademark cases[c] In the same period, China reported the acceptance of 23,000 requests for reexamination, up 22.9% y-o-y, the settlement of 17,000 cases concerned, up 11.0% y-o-u, the acceptance of 2,800 requests for invalidation, up 12.8%, and the settlement of

① China Wins Praise for Protecting IPRs- People's Daily, www.haiwainet.cn, July 31, 2019

②③ The Routine Press Conference on Q3, 2019 by the National Intellectual Property Administration， The Website of the National Intellectual Property Administration, July 9, 2019

增长 22.9%；结案 1.7 万件，同比增长 11.0%；受理无效宣告请求 0.28 万件，同比增长 12.8%；结案 0.29 万件，同比增长 18.9%[①]。

加快推进知识产权信用体系建设。同时，持续加强与世界知识产权组织、世界贸易组织、国际植物新品种保护联盟等国际组织合作，扎实推进“一带一路”知识产权合作。

3. 推进跨区域执法协作，实行失信联合惩戒。京津冀、长三角、泛珠三角、丝绸之路沿线 4 大区域协作持续深化。截至目前，13 个省市联合开展电商打假“云剑联盟”行动，共破获侵权假冒案件 158 起，涉案总价值 20 多亿元。京津冀晋蒙浙六省市开展互联网打假区域协作对接。失信联合惩戒规定，让市场主体一处违法、处处受限。全国信用信息共享平台和“信用中国”网站归集信用信息 300 亿条，公开信用信息 2.45 亿条。

（三）知识产权创造呈现量质齐升

近年来，中国专利、商标申请和授权数量逐年攀升，位居国际前列。据统计，2019 年 6 月底，中国知识产权创造呈现量质齐升的良好局面。

1. 中国专利申请总量增长速度逐渐加快。自 1985 年专利法实施以来，我国专利申请总量第一个 100 万件花了 15 年，第二个 100 万件历时 4 年 2 个月，第三个 100 万件用了 2 年 3 个月，第四个 100 万件仅用 1 年 6 个月，第五个 100 万件只用了 1 年 4 个月时间。截至 2019 年 6 月底，我国国内（不含港澳台）发明专利拥有量为 174.0 万件，每万人口发明专利拥有量达到 12.5 件，较 2018 年底增加 1 件，提前完成“十三五”规划确定的 12 件的目标；在商标方面，2019 年上半年商标注册量为 351.5 万件，同比增长 67.8%。截至 6 月底，我国有效商标注册量为 2274.3 万件，同比增长 35.3%，平均每 5.2 个市场主体拥有一件有效商标[②]。现如今，我国每年通过《专利合作条约》途径提交的国际专利申请量和通过《商标国际注册马德里协定》提交的国家商标注册申请量，已经分别位居全球第二位和第三位。

2. 中国发明专利申请结构不断优化。国家知识产权局 7 月 9 日发布的最新统计数据显示，2019 年 1-6 月，我国发明专利申请量 64.9 万件，共授权发明专利 23.8 万件，其中国内发明专利授权 19.2 万件；在国内发明专利授权中，职务发明为 18.3 万件，占 95.2%，较 2018 年同期提高 5.7 个百分点，个人发明专利申请量同比下降 46.0%，所占比重持续走低，显示出我国国内发明专利申请结构正在不断优化。国外权威组织报告也验证了中国专利申请质量进一步提升。世界知识产权组织发布的 2019 年全球创新指数（GII）报

①② 国家知识产权局 2019 年第三季度例行新闻发布会，国家知识产权局网站，2019-07-09.

2,900 cases, up 18.9% y-o-y[a].

Speeding up works for the IPR credit system. Meanwhile, China has kept enhancing cooperation with relevant international organizations such as WIPO, WTO and UPOV, and drove IPR cooperation along the Belt and Road in a down-to-earth manner.

3. Giving impetus to trans-regional law enforcement cooperation and practicing joint punishment of the dishonesty. The coordination kept deepening in 4 major areas of the Beijing-Tianjin-Hebei Region, the Yangtze River Delta, the Pan-Pearl-River Delta and the region along the Silk Road. By far, the "Cloud Sword Alliance" action for fighting against counterfeits in E-commerce field by 13 provinces and cities has broken 158 cases of infringement and counterfeits involving the case value of more than RMB 2 billion. Beijing, Tianjin, Hebei, Shanxi, Inner Mongolia and Zhejiang conducted regional coordination and connection for fighting against online counterfeits. The dishonesty punishment featured that any market entity with any case of law violation in a place will be limited everywhere. The national credit information sharing platform and the www.creditchina.gov.cn have collected 30 billion pieces of credit information and made public 245 million pieces of credit information.

iii. IPR creation increases in quantity and quality

In recent years, China has witnessed the applications for patents and trademarks increasing year by year, taking the leading place in the world. According to relevant statistics, by the end of June 2019, China presented a good situation of IPR creation improving in quantity and quality.

1. China witnesses quickening growth of the applications for patents. Since 1985 when the Patent Law was implemented, it took China 15 years, 4 years and 2 months, 2 years and 3 months, 1 year and 6 months and 1 year and 4 months to realize the first, the second, the third, the forth and the fifth 1-million applications for patents, respectively. By the end of June 2019, China had owned domestic (not including Hong Kong, Macao and Taiwan) 1.74 million invention patents, meaning up to 12.5 invention patents per 10,000 people, 1 more than that at the end of 2018 and achieving the goal of 12 patents as determined in the "13th Five-Year Plan" in advance. In the first half of 2019, China registered 3.515 million trademarks, up 67.8% y-o-y. By the end of June, China had kept valid registered trademarks of 22.743 million, up 35.3% y-o-y, meaning 5.2 market entities had 1 valid trademark on an average[b]. Nowadays, the international applications for patents through the Patent Cooperation Treaty and the national applications for trademark registration through the Madrid Agreement Concerning the International Registration of Marks by China have ranked No.2 ad No.3 in the world respectively.

2. The structure of Chinese applications for invention patents keeps optimizing. The latest statistical data released by the National Intellectual Property Administration on July 9 show that from January to June, 2019, China reported 649,000 applications for invention patents and authorized 238,000 invention patents in total, including 192,000 domestic invention patents, of which service inventions were 183,000, accounting for 95.2%, 5.7% higher than that for the same period in 2018; personal applications for invention patents decreased by 46.0% y-o-y, with the proportion down continuously, indicating that the structure of Chinese applications for invention patents kept optimizing. Reports by foreign authoritative organizations also support that Chinese patent application quality has become higher. The Global Innovation Index (GII) 2019 by WIPO shows that the ranking

①② The Routine Press Conference on Q3, 2019 by the National Intellectual Property Administration，The Website of the National Intellectual Property Administration. July 9, 2019

告显示，中国的全球创新指数排名继续提升，从 2018 年的第 17 位上升至第 14 位；中国专利密集型产业增加值占 GDP 的比重达 12.4%。

（四）知识产权运用效益突出

1. 知识产权运用成效显著，有力促进了经济社会发展。近年来，在有关部门的支持下，中国在国民经济支持产业和战略性新兴产业领域，逐步形成一批诸如特高压输电技术、天眼、蛟龙和 5G 等的高价值核心知识产权。我国知识产权运用效益大幅提升，管理能力不断提高。国家知识产权局公布的数据显示，2019 年上半年，在知识产权运用方面，全国专利和商标新增质押融资金额为 583.5 亿元人民币，同比增长 2.5%，质押项目数为 3086 项，同比增长 21.6%，其中，专利质押融资金额为 404 亿元人民币，质押项目 2709 项，涉及专利 1.3 万件，金额在 1000 万元（含 1000 万元）以下的小额专利质押融资项目占比为 68.6%。知识产权保护为经济发展注入了新的活力。

2. 加强源头保护，提高审查质量和效率。落实国务院“放管服”改革部署，2019 年上半年，我国发明专利审查周期为 22.7 个月，高价值专利审查周期为 20.5 个月，实用新型审查周期为 6.2 个月，外观设计审查周期为 4.0 个月，专利复审请求审查周期为 11.7 个月，专利无效宣告请求审查周期为 5.0 个月；2019 年上半年，商标注册平均审查周期压减到 5 个月以内，商标转让审查周期压减到 4 个月以内，商标驳回复审平均审理周期为 7 个月以内，商标变更、续展审查周期及商标注册受理通知书发放时间为 1 个月以内[①]。

3. 知识产权在推进品牌经济发展、助力特色农业和精准扶贫方面发挥了重要作用。通过支持企业实施商标品牌战略、推进产业和区域品牌建设、开展商标品牌创新创业基地建设等工作，积极发挥商标品牌的引领作用，涌现出一批具有国际竞争力的知名品牌和驰名商标。各地积极利用地理标志带动培育产业和区域品牌，在精准扶贫方面取得积极成效。截至 2019 年 6 月底，中国累计注册地理标志商标 5090 件，累计批准地理标志产品 2380 个，核准专用标志使用企业 8295 家，建设国家地理标志产品保护示范区 24 个。

六、社会治安环境改善明显

近两年来，中国政府通过开展扫黑除恶专项斗争，依法打击各类违法犯罪以及努力满足人民群众司法需求等举措，使得中国治安环境得到明显改善、政治生态有效净化、基层组织全面夯实，平安中国建设取得新进展。根据 2019 年贸促会企业问卷调查数据，

① 国家知识产权局 2019 年第三季度例行新闻发布会，国家知识产权局网站，2019-07-09

of China's global innovation index kept rising from No.17 in 2018 to No.14 in 2019; the added value of patent-intensive industries of China has accounted for 12.4% of its GDP.

iv. The IPR application benefits are striking

1. The IPR application effects are remarkable, powerfully promoting economic and social development. In recent years, under the support of relevant departments, China has gradually formed a batch of high-value core IPRs in ultra-high-voltage power transmission technology, FAST, Jiaolong deep water technology and 5G. China has greatly uplifted its IPR application benefits and kept improving its administration ability in the field. The data by the National Intellectual Property Administration show that in the first half of 2019, nationwide amount of the newly-added pledge financing of patents and trademarks in terms of IPR application reached RMB 58.35 billion, up 2.5% y-o-y, and the pledge projects were 3,086, up 21.6% y-o-y, of which the patent pledge financing amount was RMB 40.4 billion and the patent pledge projects were 2,709, involving 13,000 patents. The petty patent pledge financing projects with the amount less than RMB 10 million (included) accounted for 68.6%. IPR protection has injected new vigor to economic development of China.

2. Enhancing source protection and improving examination quality and efficiency. By implementing the reforms that delegate power, improve regulation and upgrade services, China presented the invention patent examination cycle of 22.7 months, high-value patent examination cycle of 20.5 months, utility model examination cycle of 6.2 months, appearance design examination cycle of 4.0 months, patent review request examination cycle of 11.7 months and patent invalidation request examination cycle of 5.0 months in the first half of 2019. Meanwhile, the average trademark registration examination cycle was reduced to no more than 5.0 months, trademark transfer examination cycle to no more than 4 months, average trademark rejection review cycle to no more than 7 months and trademark change and extension examination cycle and time of issue of trademark registration acceptance notification to no more than 1 month[a] .

3. IPRs play a very important role in advancing the development of brand economy and boosting special agriculture and targeted poverty alleviation. Supporting enterprises to implement the trademark and brand strategy, China moved ahead with enhancing industries and regional brands, carrying out construction of trademark and brand innovation and startup bases and actively giving play to the leading role of trademark brand, Through the efforts, a batch of famous brands and trademarks with international competitiveness appeared. By the end of June 2019, China had cumulatively registered 5,090 trademarks of geographical indications, approved 2,380 products of geographical indications, authorized 8,295 enterprises using special markings and constructed 24 demonstration zones for protection of national products of geographical indications.

VI.The public security environment is improved obviously

In recent two years, the Chinese government carried out special fight against black and evil forces and against various behaviors of law violation and crime according to law and made efforts to meet the people's judicial demands, clearly improving the public security environment, effectively purifying the political ecology, comprehensively compacting community organizations and making new progress in building a peaceful China. According to the data from questionnaire survey on enterprises by CCPIT in 2019, enterprises gave the public security a high evaluation (4.44 scores), close to the "Very Satisfied" level, and up to 89.60% of enterprises

① The Routine Press Conference on Q3, 2019 by the National Intellectual Property Administration The Website of the National Intellectual Property Administration. July 9, 2019

企业对社会治安给予了高度评价（4.44 分），接近“非常满意”水平，较满意及以上企业占比高达 89.6%；与 2018 年相比，2019 年受访企业认为生活环境有了较大改善，由 2018 年的 4.10 分提升至 2019 年的 4.24 分；其中，社会治安上升幅度最大，提升 0.14 分。

（一）开展扫黑除恶专项斗争，依法打击各类违法犯罪。

1. 严厉打击传统黑恶势力，增强人民群众安全感。2019 年，我国采取了一系列强有力的措施、行动改善社会治安环境。1 月 28 日，公安部通报全国公安机关开展扫黑除恶专项斗争有关情况，全国公安机关开展扫黑除恶专项斗争以来，共打掉涉黑组织 1292 个、恶势力犯罪集团 5593 个，破获各类刑事案件 79270 起，缴获各种枪支 851 支，查封、扣押、冻结涉案资产 621 亿元，全国刑事案件同比下降 7.7%，八类严重暴力案件同比下降 13.8%，人民群众安全感、满意度明显增强[①]。

2. 集中打击“套路贷”新型黑恶势力犯罪。与此同时，今年以来，公安部部署全国公安机关对“套路贷”新型黑恶势力犯罪开展集中打击，取得了显著成效。2019 年 2 月 26 日，公安部召开新闻发布会，通报全国公安机关打击“套路贷”新型黑恶势力犯罪有关情况。截至 2 月 26 日，全国公安机关共打掉“套路贷”团伙 1664 个，共破获诈骗、敲诈勒索、虚假诉讼等案件 21624 起，抓获犯罪嫌疑人 16349 名，查获涉案资产 35.3 亿余元[②]。

（二）坚持以人民为中心，努力满足人民群众司法需求

1. 依法审理涉民生案件。审结一审民事案件 901.7 万件，同比上升 8.7%，其中涉及教育、就业、医疗、养老、消费等案件 111.1 万件。推广河南、湖南等地法院经验，依法制裁恶意欠薪行为，帮助农民工追回劳动报酬 95.3 亿元。审结婚姻家庭案件 181.4 万件，发出人身安全保护令 1589 份。进一步深化家事审判改革，会同全国妇联等完善联席会议机制，共同促进新时代家庭文明建设。依法审理利用保健品、投资理财诈骗老年人等案件，严惩坑害老年人的犯罪行为。会同中国残联出台意见，为残疾人参加诉讼提供便利，加强对涉诉残疾人的援助救助，切实保障残疾人合法权益。

2. 促进行政争议实质性化解。审结一审行政案件 25.1 万件，出台贯彻执行新修改的行政诉讼法司法解释，发布行政审判白皮书，服务保障“放管服”改革。山西、河南、甘肃等地法院开展行政案件集中管辖试点，军事法院推进军事行政审判试点，取得良好效果。依法审理房屋拆迁、劳动保障等行政案件，维护行政相对人合法权益。

① 全国公安机关共打掉涉黑组织 1292 个 恶势力犯罪集团 5593 个 - 经济日报，2019-01-28
② 全国公安机关打掉“套路贷”团伙 1664 个 抓获犯罪嫌疑人 16349 名 - 新华网，2019-02-26

expressed satisfaction or higher satisfaction. Compared with 2018, the enterprises interviewed in 2019 thought great improvement of living environment, with the rating up to 4.24 scores in 2019 from 4.10 scores in 2018, of which the rating of the public security improved at the highest level, up 0.14 scores.

i. Carrying out special fight against black and evil forces and against various behaviors of law violation and crime according to law

1. Severely fighting against traditional black and evil forces to enhance the people's sense of safety. In 2019, the Chinese government took a series of forceful measures and actions to improve the public security environment. On January 28, the Ministry of Public Security briefed relevant situations of the special fight against black and evil forces: since the fight was launched, 1,292 underworld organizations and 5,592 black-and-evil criminal gangs had been knocked out, 79,270 various kinds of criminal cases had been broken, 851 guns of various kinds had been captured and the RMB 62.1 billion of assets involved had been sealed up, seized or frozen, making nationwide criminal cases down by 7.7% y-o-y and 8 kinds of serious violent cases down by 13.8%, and obviously enhancing the people's sense of safety and satisfaction[a].

2. Focusing on hitting new-type crimes of black and evil forces such as "Fraudulent Loan". Besides the special fight, the Ministry of Public Security arranged all public security organs around China to focus on hitting new-type crimes of black and evil forces such as "Fraudulent Loan", with remarkable achievements made. On February 26, 2019, the Ministry of Public Security held a press conference, briefing relevant information on the campaign. By the end of February 26, the public security organs around China had knocked out 1,664 gangs of "Fraudulent Loan", broken 21,624 cases of fraudulence, extortion and false lawsuits, arrested 16,349 suspects and seized RMB 3.53 billion of assets involved[b] .

iii. Sticking to people orientation to meet judicial demands of the masses

1. Hearing cases involving people's livelihood according to law. 9.017 million of first-instance civil cases were closed, up 8.7% y-o-y, of which 1.111 million were of education, employment, medical care, pension and consumption. Experiences from courts in Henan and Hunan were popularized to punish malicious arrearage of salaries according to law, helping migrant workers take back RMB 9.53 billion of labor remunerations.1.814 million of marriage and family-affair cases were closed, and 1,589 copies of personal safety protection order were issued. The judicial departments further deepened family-affair judgment reform and worked together with the All-China Women's Federation to perfect the joint conference mechanism and jointly drive family civilization in the new era. Relevant courts also heard cases of defrauding old people through healthcare products, investment and wealth management, and severely punished crimes entrapping old people, and released opinions together with the China Disabled Persons' Federation to facilitate lawsuits involving the disabled, enhance aid and assistance to relevant disabled persons and really guarantee their lawful rights and interests.

2. Promoting substantial mitigation of administrative disputes. The judicial departments closed 251,000 first-instance administrative cases, mapped out and implemented the newly- revised judicial interpretation of the Administrative Procedure Law and issued the white paper on administrative judgment, to serve and guarantee the reforms that delegate power, improve regulation and upgrade services. Courts in Shanxi, Henan and Gansu carried out the pilot of centralized jurisdiction of administrative cases, and military courts advanced the pilot of military administrative judgment, with good effects achieved. Administrative cases of house demolition and labor security were heard according to law, to safeguard lawful rights and interests of administrative counterparts.

① Public Security Organs Around China Knock out 1,292 Underworld Organizations and 5,593 Gangs of Black and Evil Forces-Economic Daily, Jan. 28, 2019

② Public Security Organs Around China Knock out 1,664 Gangs of "Fraudulent Loan" and Arrested 16,349 Suspects-www.xinhuanet.com February 26, 2019.

3. 保护港澳台同胞和归侨侨眷、海外侨胞合法权益。审结涉港澳台案件 1.7 万件，办理涉港澳台司法协助互助案件 9502 件。签署内地与香港法院相互认可和执行民商事案件判决的安排，基本实现内地与香港民商事领域司法协助全覆盖。福建法院推出 59 条措施，切实保护台胞台企合法权益。审结涉侨案件 1.6 万件。会同中国侨联出台意见，在福建、广东、海南等 11 个省区市开展涉侨纠纷多元化解试点，促进涉侨纠纷有效化解。

七、基础设施建设进一步加强

近年来，全国各地不断加大传统基础设施和新一代信息基础设施建设力度，基础设施环境进一步优化。2019 年贸促会企业问卷数据显示，基础设施环境评价为 4.32 分，总体良好。其中，水电气供应、网络通信给与的评价最高，分别为 4.41 分、4.35；东部较满意及以上企业占比超九成，高达 90.40%；与 2018 年前相比，企业评价进一步提升。

（一）传统基础设施建设力度不断加大

2019 年以来，基建项目密集批复、开工，各地重大项目投资计划纷纷上马，基建补短板步入快车道。2019 年以来，国家发改委共批复多项涉及交通、能源、水利等传统重大基础设施建设项目。其中，交通领域是重头戏。据统计，2019 年以来，国家发改委批复的重大项目已经超过 8000 亿元，企业债规模突破 7000 亿元。从发债的用途来看，很多企业债都用于地下管廊、高速公路等基建项目，在国家发改委累计批复的超过 8000 亿元项目中，仅涉及交通领域的建设资金就达到约 7000 亿元[①]。

（二）新一代信息基础设施建设提速

2019 年，我国加快构建高速、移动、安全、泛在的新一代信息基础设施，积极提升跨区域和全球范围信息交互的效率和水平，让信息通信技术在发展壮大数字经济、推动高质量发展等方面发挥更大作用。截至 2019 年 5 月，全国建成 437 万个 4G 基站，4G 用户超过 12 亿，月户均移动互联网接入流量达到 7.8GB[②]。6 月 6 日，工信部正式向中国电信、中国移动、中国联通、中国广电发放 5G 商用牌照，我国正式进入 5G 商用元年。5G 由愿景步入现实，5G 与人工智能、物联网、云计算等技术交织并进，加快催生新产业、新业态、新模式，引发生产生活方式的深刻变革。目前，5G 网络和终端均已步入成熟阶段，

① 补短板加力 稳投资下半场火热开局，经济参考报 - 2019-07-12
② MWC19 上海大咖发声：数字经济占中国 GDP 超 1/3，扬子晚报 - 2019-06-27

3. Protecting lawful rights and interests of Hong Kong, Macao and Taiwan compatriots, returned overseas Chinese and foreign compatriots. The judicial departments heard and closed 17,000 cases and handled 9,502 cases of judicial cooperation and assistance involving Hong Kong, Macao and Taiwan; signed the arrangement for mutual recognition and execution of judgments on civil and commercial cases between mainland courts and Hong Kong courts. Courts in Fujian released 59 measures to really protect lawful rights and interests of Taiwanese and Taiwan enterprises. The judicial departments heard and closed 16,000 cases involving overseas Chinese, and worked together with the All-China Federation of Returned Overseas Chinese to map out opinions and conduct the pilot of diversified mitigation of disputes involving overseas Chinese in Fujian, Guangdong and Hainan, to promote effective mitigation of such disputes.

VII.Infrastructure is further enhanced

In recent years, all regions around China kept intensifying traditional infrastructure and new-generation information infrastructure, further optimizing infrastructure environment. The data from questionnaire survey on enterprises by CCPIT in 2019 showed that the infrastructure environment was given 4.32 scores, meaning a good level overall. Of the infrastructure, water, power and gas supply and network communication won the highest evaluation, with 4.41 scores and 4.35 scores respectively. In East China, enterprises expressing satisfaction or higher satisfaction accounted for up to 90.40%; enterprises confirmed higher evaluation compared with those before 2018.

i. The construction of traditional infrastructure keeps intensifying

Entering 2019, capital construction projects were approved and commenced intensively, and major project investment plans of local governments were launched one after another, and the works to strengthen points of weakness in capital construction were on the fast track, The National Development and Reform Commission approved many traditional major infrastructure projects in communications, energy and water conservancy, with the focus on communications. According to relevant statistics, since the beginning of 2019, major projects approved by the National Development and Reform Commission have reported the investment of RMB 800 billion and the corporate bonds have topped RMB 700 billion. In view of purposes of the bonds, many of which have been used for capital construction projects such as underground pipeline corridor and expressway, etc. Of the projects with the investment more than RMB 800 billion approved by the National Development and Reform Commission in succession, the investment in construction involving communications reaches RMB 700 billion[a].

ii. The construction of new-generation information infrastructure is accelerated

In 2019, China sped up the steps to build new-generation information infrastructure high-speed, mobile, safe and extensive, to actively uplift trans-regional and global information exchange efficiency and level and make information and communications technologies play greater roles in developing and strengthening digital economy and in driving high-quality development. By the end of May 2019, China had completed 4.37 million 4G base stations, covering more than 1.2 billion 4G users and with average monthly household Internet access flow up to 7.8GB[b]. On June 6, the Ministry of Industry and Information Technology officially issued 5G licenses for commercial use to China Telecom, China Mobile, China Unicom and China Broadcasting Network Corporation Ltd., marking that China entered the first year of the era of 5G commercial use officially, 5G's integration with our real life from a vision and its interweaving and advancing together with AI, IoT, cloud computing and other technologies will speed up the birth of new industries, new forms of businesses and

① Efforts Are Intensified to Strengthen Points of Weakness and Works to Stabilize Investment Are Kicked Off in the Second Half Economic Information Daily-July 12, 2019

② MWC19 Shanghai Big Names Voiced: Digital Economy Accounts for More Than One Third of China's GDP Yangtze Evening News- June 27, 2019.]

有近 20 款 5G 手机可上市；2019 年将主要在热点地区、大城市等关键地区部署 5G，未来农村也将是 5G 部署的重点，将进一步推进新一代信息通信基础设施发展。

案例：河北将“智造”全新生产生活方式

河北省印发《关于加快推进新型智慧城市建设的指导意见》（以下简称“意见”），提出到 2020 年，建设一批特色鲜明的新型智慧城市，筛选确定 3 个市主城区和 10 个县城开展新型智慧城市建设试点，探索符合河北省情的市、县级智慧城市发展路径。其中，意见明确加快构建城乡一体的宽带网络，建设高速、移动、安全、泛在的新一代信息基础设施。到 2020 年，城镇地区实现千兆、有条件的农村实现百兆宽带接入能力，实现 4G 网络 100% 覆盖城乡，推动 5G 试商用。推动城市公用设施、建筑等智能化改造，推进京津冀一体化智能交通服务。建设智能物流信息平台和仓储式物流平台枢纽，加强物流信息的开发共享和社会化应用。

new models, and trigger deep change of life and production styles. Currently, 5G network and terminal have become mature, and nearly 20 models of 5G mobile phones are available in market. In 2019, 5G system will be arranged mainly in key areas such as hotspots and large cities. In the future, the rural area will also be a key in 5G arrangement, which will further drive the development of new-generation infrastructure of information and communications.

Case: Hebei will build a wholly-new production and life style through "Intelligent" technology

Hebei Province issued the Guiding Opinions on Speeding up the Construction of New-type Smart Cities (hereinafter referred to as the "Opinions"), proposing to construct a batch of new-type smart cities with clear-cut characteristics by 2020. It will screen and confirm downtown areas of 3 cities and 10 county seats to carry out the pilot of new-type smart city construction and explore the path of developing county-level smart city. In particular, the Opinions clarify the works to speed up building the urban-rural-integrated broadband network and the new-generation information infrastructure high-speed, mobile, safe and extensive. According to the Opinions, by 2020, the Province will achieve the capabilities of 1000M access for cities and towns and 100M access for villages with the conditions available, and will realize 100% 4G network coverage of all urban and rural areas and drive trial commercial use of 5G. The Province will also move ahead with intelligent improvement of urban public utilities and buildings, and with Beijing-Tianjin-Hebei-integrated intelligent traffic service; construct intelligent logistics information platform and warehouse logistics platform hub, to enhance the development, sharing and social application of logistics information.

第五章 问题与不足

调研发现，中国营商环境存在以下几方面问题。

一、部分地区政策制定、执行有待提升

近年来，各级政府不断加大工作力度，政策政务环境优化取得明显成效，但仍存在一些不足之处。2019 年贸促会企业问卷调查数据显示，受访企业对政策透明度评价相对较低，为 4.28 分，较满意及以上企业占 83%；政策协同性较满意及以上企业占 84.3%。

（一）一些地区政府服务意识不强、服务能力较弱

当前，我国正处于改革开放持续深化关键阶段，国家不断加大“放管服”改革力度，但是一些地区在贯彻落实过程中，仍存在理念意识滞后、服务意识不强、综合业务能力不足、工作表现惰性等问题，导致政策执行迟缓、执行力度不够等问题仍然存在；个别政府服务领域依然存在制度性门槛，办事流程复杂、办事效率低下，企业无法及时、准确、完整地获取政策消息，甚至一些偏远地区还出现企业去政府部门办事碰一鼻子灰的情况。

（二）信息孤岛、项目申报重复提交材料等问题依然存在

虽然近年来各级政府加大了电子政务投入力度，政务电子信息化建设取得巨大成就，政务信息互联互通步伐明显加快，但是部分地区信息割裂和数据孤岛等问题依旧存在，在企业项目申报、审批、验收等环节，亦或是办理结汇等事项，依然需要在不同部门、不同环节、不同阶段重复提交材料，甚至在有些情况下不同部门之间还会各自以其他部门验收通过为前置条件，导致企业的项目审批难以顺利推进，经常要在不同部门之间进行协调沟通，甚至需要找更高一层机构或领导专门协调或办理，导致办事效率低，加重企业负担。

Chapter V Problems and Deficiencies

The business environment in China is facing the following issues through surveys:

I.Some regions need to improve the policy formulation and implementation

In recent years, the governments at all levels have redoubled their efforts to optimize the environment for policies and governmental affairs, which have achieved remarkable results, but remained some deficiencies. According to a questionnaire survey on enterprises in 2019 by the CCPIT, in terms of policy transparency, the evaluation was relatively low, with only 4.28 points, and 83% of the interviewed enterprises gave a rating of "relatively satisfied and above"; and in terms of policy coordination, 84.3% of the interviewed enterprises felt "relatively satisfied and above".

i. Some local governments have weak service consciousness and capabilities

At present, China is at a critical stage of further deepening the reform and opening-up, during which the country continuously enhances its reforms to delegate power, streamline administration and optimize government services. However, during the implementation, some regions still encounter a few problems, such as the lack of philosophy and awareness, weak service consciousness, deficiencies in comprehensive service capabilities and laziness at work, leading to slow and insufficient execution of policies. Besides, institutional barriers still exist in the service sector of some governments, leading to complicated handling procedures and low handling efficiency, so that enterprises are unable to acquire complete policy information in a prompt and accurate way. In some remote areas, enterprises even meet with many refusals when they handle affairs at governmental departments.

ii. Information Island and repeated submission of project application materials still exist

In recent years, governments of all levels have increased the investment in e-government, made great achievements in the construction of e-governmental information technology, and accelerated the interconnection between government information. However, due to fragmented information, Data Island and other issues, enterprises in some regions still need to repeatedly submit materials in different departments, links and stages during the application, approval, acceptance and other procedures of projects, or even set the acceptance approval of other departments as the precondition. Under these circumstances, it is very difficult for enterprises to smoothly advance the approval of projects. They need to coordinate and communicate with different departments, or even look for higher-level institutions or leaders, leading to low efficiency in handling affairs and heavier burdens on them.

（三）部分政府审批权限下放仍然较为滞后

由于一些涉企业务或项目审批权限归集于上一层级政府，导致在地市一级城市及以下注册或经营的企业不仅无法进行网络项目申报，甚至还要经常往返省会城市等上一级政府部门，从而增加了企业的办事时间和经济成本。例如，部分地区虽然外贸业务迅速发展，但是当地政府却没有报关业务权限，导致外贸企业必须到省会城市或者具有办理权限的相关城市办理，大幅度降低了办事效率。

（四）一些地区政策制定、实施主观性较强

个别地方政府在政策制定、实施过程中不注重实地调研，科学性有待提高，经常存在低效、反复、僵化和“一波热”等问题，主观随意性较强。一是一些地方对国家出台的政策往往会在第一时间给予回应，但过快的回应往往难以结合本地特殊情况进行政策细化、调整、完善，更没有从政策的全生命周期进行系统考量。例如，一些地方习惯于对应着上级政策文件制定本级政策，个别地方甚至原封不动直接套用上级政策文件，文件虽然发布了，却没办法执行，浪费了大量政策资源。二是一些地方紧跟国家政策方向，一拥而上推出政策，往往开头热火朝天，但时日不久便问题重重，政策“一波热”、“政策烂尾”等问题依然存在。比如，前几年“大众创业、万众创新”政策在全国掀起热潮，各种优惠政策层出不穷，一大批中小微企业在没有初期积累和创业辅导的情况下大量涌现，一些企业由于没做好充足准备，导致无法开展经营，对创业创新的社会信心造成了一定负面影响。三是个别基层部门在政策制定和执行过程中经常存在政策反复、“一刀切”、僵化解读等问题，影响了政策的公信力和基层政府的信誉和形象。例如，近年来一些地方大搞环保“一刀切”，对于钢铁、水泥、玻璃、化工、陶瓷、造纸、食品、有色金属等行业的企业，不先进行调研，就一律先关停，没有留出政策缓冲时间，造成了不少社会怨言和基层矛盾，伤害了部分企业经营、发展实业的积极性。

（五）个别地方政策目标存在功利化导向

有些地方政府没有将营商环境的持续改进作为首要任务，而是将招商引资作为最重要的考核目标，认为只要把企业招入就算是完成任务，这种目标导向容易导致政府应有职能的弱化和社会资源的错配，甚至造成不良后果。一是一些地区重招商而不重营商，采取简单方式让企业在当地落户和纳税，而不注重在当地形成产业能力、培育产业集群。例如，一些地方在招商时，首先把廉价卖地卖楼、税收退免等作为重要政策优势，不管

iii. Some governments still lag behind in approval power delegation

As some approval powers involving enterprise business or projects are attributed to the higher-level governments, enterprises who register or operate in prefecture-level cities and below are unable to report projects online, and even need to report to higher-level governmental departments in capital cities, leading to the increase on affair-handling time and economic costs. For instance, some regions witness rapid developments of foreign trade business, but local governments have no customs declaration power. In this case, foreign trade enterprises must go through customs declaration business in capital cities or cities with handling permissions, which has significantly reduced the working efficiency.

iv. Some regions show strong subjectivity in policy formulation and implementation

Some local governments lack field surveys and scientific nature during policy formulation and implementation, and often face low efficiency, repetition, rigidity, short-term enthusiasm and other issues, showing strong subjectivity and arbitrariness. First of all, some local governments can quickly respond to national policies, but it is difficult for them to refine, adjust and optimize policies in combination with special local conditions and conduct systematic assessment of the full life cycle of policies. For example, some regions are used to formulating local policies in accordance with superior policy papers, and some even directly apply them without any change. Papers are issued, but they cannot be executed, leading to a huge waste of policy resources. Besides, some regions closely follow national policy directions and rush to issue policies. They are in full swing in the very beginning, but as time goes by many problems will emerge, such as short-term enthusiasm and incomplete execution of policies. For instance, the “mass entrepreneurship and innovation” swept across China a few years ago, followed by various kinds of favorable policies. A large number of medium-, small- and micro-sized enterprises sprang up without initial accumulation and entrepreneurship guidance, but some were not fully prepared to run a business, causing some negative impacts on social confidence of entrepreneurship and innovation. Moreover, some grass-roots governmental departments often face policy repetition, “a single solution to diverse problems”, rigid interpretation and other issues during policy formulation and implementation, which has affected the public trust of policies as well as the reputation and image of grass-roots governments. For example, in recent years, some local governments have provided a single solution to diverse problems in environmental protection. Without surveys and research in advance, they just shut down enterprises in fields of steel, cement, glass, chemical industry, ceramics, paper making, food and nonferrous metals, but did not leave time for policy buffer, leading to many social complaints and grass-roots contradictions, and hurting some enterprises’ initiative in operating and developing industries.

v. Some local policies are utilitarian oriented

Some local governments do not set the constant improvement of business environment as the primary task, but view investment attraction as the most important assessment objective. They believe the task is accomplished as long as enterprises settle down. This goal orientation is easier to cause the weakening of governments’ original functions and mismatch of social resources, and even adverse consequences. First of all, some regions value investment attraction more than business environment, and adopt simple ways to make enterprises settle down and pay taxes, instead of focusing on building industrial capacity and fostering industrial clusters in the regions. For instance, while attracting investment, some regions first view sale of land and buildings for cheap prices and tax refunds or exemptions as major policy advantages, do not care about whether enterprises truly invest or operate in the regions or not. Local governments massively attract investment as long as enterprises

企业是否在本地真正投资经营，只要落户上税就大肆招商，甚至一些地方还反映可用土地严重不足限制了招商进度，可事实是部分园区楼空无人，有税收无产业、有企业注册无人员工作，表面上用地不足，实际是数字挪移，造成资源浪费。二是个别地区注重前期招商，而不重视招商后提高服务质量，甚至出现不兑现承诺政策、政府失信、影响地域形象的现象。例如，个别地方在招商时企业是个香饽饽，各个部门都围着企业转，承诺提供各种支持政策，一旦企业入驻就立刻变脸，承诺政策不予兑现，企业的投资甚至打了水漂。三是一些地方热衷追逐政策热点，只顾眼前引入，一窝蜂发展各种产业或园区，一旦出现政策变动，便立刻限制关停。四是招商政策短期性和功利化倾向，给投机分子提供了利用空间，个别人或企业、机构打着投资的名义，恶意骗取补贴资金，造成了不良社会影响。

（六）个别地区政策执行效果不甚理想

营商环境政策效果的好坏有赖于政策执行的力度，但一些地区或个别政策执行流于形式的老问题却仍未得到彻底解决，让原本服务企业的政策，变成了消耗企业的束缚。一是近年来中央一再要求精简审批程序，各地也推出“最多跑一次”等改革并取得了长足进步，但个别地区仍存在部分办事人员服务不到位、审批事项仍需反复多次办理及部分领域“最多跑一次”流于口号的问题。二是“文山会海”依旧存在，文件数量越来越多，文件质量和执行更难以到位。例如，我国近年来持续加大知识产权保护法律法规制定、完善力度，但是法律法规执行力度却较薄弱，颇受外资企业抱怨。三是一些政府项目的申报没有实行信息化，即便已经实行网络申报的事项，却仍要现场纸质版申报，且多次上报、重复上报问题司空见惯。此外，一些政府项目依然保留较多的审批环节和较为复杂的过程，加之期间评估、认证、检测等各类中介服务收费偏高等，不仅增加了办事时长，还额外多出不少费用。2019 年贸促会企业调查问卷数据显示，88.2% 的企业对政策政务环境整体表示满意，但对政策执行满意度略低，较满意及以上占 85.1%。

二、企业综合经营成本居高不下

2019 年来，中国政府出台了系列减税降费的举措，在一定程度上缓解了企业压力，但受当前国内外客观因素影响，企业综合经营成本仍然较高。2019 年贸促会企业调查问卷数据显示，76.9% 的受访企业表示成本提高是其在生产经营过程中遇到的普遍问题，其中，传统制造业、高新技术产业、资源行业及建筑业中的企业将成本提高视为企业经

settle down and pay taxes, and some even reflect that the insufficient available land restricts the progress of investment attraction, but the truth is that some industry parks are vacant, with taxes but without industries, with enterprise registration but without employees. The superficial phenomenon is insufficient land, but the fact is digital removal and a waste of resources. Besides, some regions value investment attraction in the early stage more than the improvement of service quality in the later stage, leading to the failure to fulfill policy promises, lack of governmental credibility and influence on regional images. For example, while attracting investments, enterprises are very popular in some regions, and all departments surround enterprises, and vow to offer various support policies. Once enterprises settle down, their attitudes will be changed, with policy promises unable to be fulfilled and enterprises' investments turning out to be nothing. Moreover, some regions are keen on pursuing policy hot spots, and only focus on present introduction and massively develop various industries or industrial parks. Once any policy change takes place, these industries or parks will be immediately restricted or shut down. Furthermore, the short-term and utilitarian tendency of investment policies offers a chance for speculators, and some individuals, enterprises or institutions, in the name of investment, maliciously swindle governments out of subsidies, leading to negative social impact.

vi. The effect of policy implementation is not satisfying in some regions

The effect of business environment policies depends on the implementation status of policies, but in some regions the policy implementation becomes a mere formality, leaving the age-old problem unsolved. Policies which are meant to serve enterprises have become a constraint that consumes enterprises. Firstly, in recent years, the central government has called on streamlining approval procedures, and local governments have launched reforms such as "running one errand at most" with great progress. However, issues, such as poor service from some civil servants, repeated handling of approval matters, and the failure to implement the "running one errand at most" reform in some regions, still exist in some regions. Secondly, the phenomenon of "huge papers and meetings" still exists, so that the number of papers is growing, but their quality and execution are difficult to be in place. For instance, in the past few years, China has continued to formulate and improve laws and regulations to enhance the intellectual property protection, but the implementation of laws and regulations is fragile, receiving many complaints from foreign-funded enterprises. Thirdly, some governmental projects fail to achieve online reporting. Enterprises who accomplish online reporting still need to report papers on site, and the phenomenon of multiple and repeated reporting is very normal. Besides, some governmental projects still keep many approval procedures and the complicated process, and high charges from various intermediary services such as assessment, certification and testing have not only prolonged the duration of affair handling, but also increased many extra expenses of enterprises. According to a questionnaire survey on enterprises in 2019 by the CCPIT, in terms of the overall environment of policies and governmental affairs, 88.2% of the interviewed enterprises felt satisfied, but the evaluation on policy implementation was a little bit lower, with 85.1% of the interviewed enterprises giving a rating of "relatively satisfied and above".

II.Enterprises' integrated operating costs remain very high

Since 2019, the Chinese government has issued a series of measures on tax and fee reduction, which have eased the pressure of enterprises to some degree. However, due to objective factors at home and abroad, the comprehensive operating costs are still very high for enterprises. According to a questionnaire survey on

营过程中遇到的最主要问题。

（一）企业税费减负仍有空间

多年以来，减税降费一直是企业的呼声。今年以来，我国将企业增值税率从 16% 降到 13%，提振了企业发展信心。但是，我国税费负担，特别是企业税费负担仍然较重。一是我国宏观税负水平与其他发展中国家、转型国家相比仍然偏高。中央党校国际战略研究所的研究显示，中国 2017 年宏观税负水平，分别比发展中国家和转型国家和平均水平高出 19.2 和 7.1 个百分点，与发达国家平均水平相当。二是我国税费的主要征收对象是企业，约 80%-90% 的税收来自于企业，企业税负负担过重。根据中央党校国际战略研究所测算，我国企业税负水平比高收入国家平均值高出近 29.73 个百分点[①]，比中高等收入国家平均水平高出 28.85 个百分点，比世界平均水平高出 26.84 个百分点。三是我国税收以流转税为主，优点在于能够保证充足的税源，但其缺点则在于各层级部门征税权责不明确，容易出现对同一对象重复征税的情况，从而进一步加重企业负担。四是制度性交易成本较高。部分地区、个别领域仍然存在审批环节过多、程序复杂，评估、认证、检测等各类中介服务收费偏高等问题。某产业促进会代表反映，部分中介机构验收行为不规范，中介收费过高，增加企业负担。2019 年贸促会企业调查问卷数据也显示，受访企业税费缴纳次数平均为 15.23 次 / 年，其中，资源行业总税率最高（13.01%）。

（二）劳动力成本持续上涨

我国劳动力人口下降与劳动力成本上涨是近年来企业面临的重要问题，尤其是快速上涨的用工成本，已经成为企业主要的成本压力。企业所面临的劳动力成本主要包括工资、社保和其他相关成本。2019 年贸促会企业调查问卷数据显示，2019 年人工成本占总成本高达 27.64%，人工成本年均上涨幅度达 9.5%，其中，服务行业上涨最快，达 11.83%。根据《中国企业社保白皮书 2018》的数据，53% 的受访企业表示其人力成本占总成本比重超过 30%；其中 16% 的受访企业表示该比重高达 50% 以上。从工资成本来看，工人工资普遍上涨，调研数据显示，广东等沿海省市普通工人的工资已经达到 5000 元 / 月左右，具有一定技术含量的工人月工资接近一万元，比去年同期大幅上涨；而中西部用工紧缺地区也面临同样的高工资问题，企业普工工资为 4-5 千元 / 月，技工工资为 6-8 千元 / 月，劳动力成本压力突出。从社保成本来看，虽然 2019 年以来社保缴费比例下调，但是在一

① 世界银行公开数据库，总税收占商业利润的比值 :http:data.worldbank.org/indicator/IC.TAX.TOTL.CP.ZS.

enterprises in 2019 by the CCPIT, 76.9% of the interviewed enterprises noted that the increase on costs is a universal problem enterprises are facing in the process of production and operation, with enterprises in traditional manufacturing, high-tech, resources and construction sectors most affected.

i. There is still room for tax and fee reduction of enterprises

Over the years, tax and fee reduction has been the call of enterprises. Since this year, China has lowered the corporate VAT rate from 16% to 13%, which has boosted enterprises' confidence in development. However, China's tax and fee burden, particularly the burden on enterprises, is still very heavy. Firstly, the macro-tax burden level in China is higher than that in other developing countries and countries in transition. Research from the International Institute for Strategic Studies of the Party School of the CPC Central Committee indicates that China's macro-tax burden level in 2017 is 19.2 and 7.1 percentage points higher than the average level in developing countries and countries in transition, respectively, and flat with the average level in developed countries. Secondly, the main collection object of taxes and fees in China is enterprises, with around 80%-90% of the government's tax revenues coming from enterprises, leading to a high tax burden on them. As calculated by the International Institute for Strategic Studies of the Party School of the CPC Central Committee, Chinese enterprises' tax burden level is 29.73 percentage points higher than the average level in high-income countries, 28.85 percentage points higher than the average level in middle- and high-income countries, and 26.84 percentage points higher than the average level of the world[a]. Thirdly, turnover tax is the dominant part of China's tax system. Its advantage is that it can guarantee sufficient tax resources, but the disadvantage is that the levying authority and responsibility are not clear among the departments of all levels, which is easier to cause repeated collection on the same object, and further increase the burden on enterprises. Fourthly, the institutional transaction costs are relatively high. Problems, such as excess approval links, complicated procedures, relatively high charges on intermediary services like evaluation, certification and testing, still exist in some regions and sectors, leading to increased burden on enterprises. According to a questionnaire survey on enterprises in 2019 by the CCPIT, the interviewed enterprises pay taxes and fees for 15.23 times a year on average, and the total tax rate is highest in the resources sector (13.01%).

ii. Labor costs continue to rise

The reduction of working population and the rise of labor costs are the key issues Chinese enterprises have faced in the past few years. Particularly, the fast-growing labor costs have become the main cost pressure of enterprises. Labor costs enterprises are facing mainly include wages, social security and other relevant costs. According to a questionnaire survey on enterprises in 2019 by the CCPIT, labor costs have accounted for 27.64% of the total costs in 2019, with an annual increase of 9.5% on average, and the apparel sector has witnessed the fastest rise of 11.83%. According to data from the China Enterprise Social Insurance White Paper 2018, 53% of the enterprises surveyed said that labor costs account for over 30% of the total costs, while 16% responded that the proportion reaches over 50%. From the perspective of wage costs, the wages for workers have universally risen. Survey data show that the average wage for ordinary workers has increased to around RMB 5,000 per month in coastal provinces and cities such as Guangdong, while that for technical workers has approached RMB 10,000, much higher than that in the same period of last year. Labor-shortage regions in central and western China also face the same problem, with the average wage for ordinary workers climbing to RMB 4,000-5,000 a month and that for technicians reaching RMB 6,000-8,000, bearing the prominent labor cost pressure. From the perspective of social security costs, the ratio of social security contribution has decreased since 2019, but

① world bank open database, ratio of total tax revenue to business profits:http:data.worldbank.org/indicator/IC.TAX.TOTL.CP.ZS.

些地区社保基数却持续上涨，企业社保负担并未减轻。例如，西南某省最低社保缴费基数 2017 年为 2400 多元，2018 年为 2800 多元，2019 年为 3300 多元，年均涨幅超 10%，为工人缴纳的社保费用约占工人总收入的 30-40% 左右。此外，面对“90 后”等新的劳动就业群体，企业为招揽工人，投入资金配备网络、空调等设备改善工作和居住条件，并且还要为频繁的人员流失支付相应的培训和管理成本。

（三）能源成本比重较大

由于自有能源供给有限或能源规划不合理，一些地区能源供应的稳定性仍是是企业头疼的问题。一方面，不同区域间能源供给能力和能源需求不协调，导致局部区域电价较高。例如，调研中发现，近几年广西一般工业用电价格虽大幅下调，但仍高于云南、贵州等周边省份；工业用气价格要高出周边省份一成以上。再有，电费收取方式也容易造成企业成本波动，一些地方规定企业需以工业园区为单位参与电力市场交易，由售电公司打捆代理本区域内水电挂牌交易，即每月按要求在电力交易中心网站上报企业预测用电需求量，再由售电公司负责帮助企业统筹摘牌购电。企业实际用电在预报用电量 ±5% 浮动以内，企业可享受扶持电价，否则将被罚款。但是现实情况是，企业生产用电量随订单波动较大，存在较大不确定性，很难准确预报用电量。另一方面，政策调整导致的能源替换，因没有妥当的能源补给安排和配套设施，导致企业能源成本陡然增加。企业反映，按照环保要求，企业使用天然气取代煤，但天然气价格相对较高，企业年度能源成本直接增加数百万元，加上当地天然气开采技术并不成熟且使用指标稀缺，导致开通管道输气后产生了计划内、计划外两种用气价格，一旦被收取计划外价格，能源成本将额外大幅增加。

（四）物流运输成本偏高

近年来我国物流成本水平总体呈下降趋势，但全社会物流总费用高出全球平均水平 5% 左右，占 GDP 的比例不仅高出美、日、德等发达国家一倍左右，且高于印度、巴西等其他金砖国家。例如，地方铁路物流运输要比国家铁路收费标准高，不利于省域贸易物流发展；一些港口货运航线航班少、时间慢、费用高，导致企业原材料及产品进出只能采用陆运方式，然而当地较高的陆运成本显著增加了企业负担；港口综合物流成本较高，生产性服务水平偏低，港杂费（装卸、储运）、集装标箱费、代理报关报检费、海关出口收费、过磅费等均存在局部过高问题，港口服务能力难以满足激增的货物需求，导致通关时间增长，货物的港口装卸、运输等费用大幅增加，部分时效性要求高的电子产品

the social security base in some regions has constantly risen. Enterprises' social security burden has not been relieved. For instance, the minimum social security contribution base was over RMB 2,400 in 2017, RMB 2,800 in 2018 and RMB 3,300 in 2019 in some province of southwest China, with the annual increase of over 10%. The social security costs enterprises have paid for workers stand for around 30%-40% of their total incomes. Additionally, targeting new labor and employment groups such as the post-90s, enterprises need to equip Internet, air conditioners and other devices to improve the working and living conditions of workers, and pay corresponding training and management costs for the frequent loss of employees.

iii. Energy costs represent a large proportion

With the limited energy supply or irrational energy planning, the stability of energy supply remains a headache for enterprises in some regions. On one hand, the energy supply capacity and energy demands in different regions are not coordinated, leading to higher electricity charges in some regions. For instance, a survey indicates that the general industrial electricity price has remarkably reduced in the past few years, but is still higher that in neighboring provinces, such as Yunnan and Guizhou. Meanwhile, the industrial gas price is over 10% higher than that in neighboring provinces. Besides, the electricity charging way also easily causes the fluctuation of enterprise costs. Some regions require enterprises to participate in power market transactions with the unit of industrial park. The electricity-selling company bundles the listed water and electricity trading in a specific region, i.e. reporting enterprises' predicted electricity demands to the website of the electric power transaction center each month as required, and uniformly purchases electricity for enterprises. With the fluctuation of ±5% of predicted electricity consumption, enterprises can enjoy a supporting electricity price; otherwise they will be fined. However, the truth is that it is very difficult for enterprises to predict their electricity consumption as it changes with orders, which face many uncertainties. If enterprises' electricity consumption is higher or lower than over 5% of the prediction, they will be fined. On the other hand, the energy replacement caused by policy adjustments leads to a surge on energy costs of enterprises due to the lack of proper energy subsidy arrangements and supporting facilities. Enterprises have reflected that according to the requirements of environmental protection, enterprises should replace coal with natural gas. Owing to a high price of natural gas, enterprises' energy costs may directly increase by several million yuan. Besides, due to the immature mining technology and the lack of using indicators in local areas, there are two kinds of natural gas prices, namely the price within the plan and that out of the plan, after the opening of the pipeline transmission of natural gas. Once the price out of the plan is charged, enterprises' energy costs will significantly increase.

iv. Logistics and transportation costs are relatively high

In recent years, China's logistics costs have declined as a whole, but the total expenses on logistics of the whole society have been 5% higher than the global average level, with the proportion in GDP almost doubling that of developed countries, such as the U.S., Japan and Germany, and higher than other BRICS countries, such as India and Brazil. For example, logistics and transportation of local railways charge more than those of national railways, which is not beneficial to the development of inter-provincial trade logistics. Because of few shipping lines, a long duration and high costs of freight routes in some ports, enterprises can only transport raw materials and products by land, but the high land transport costs in the regions have remarkably increased the burden on enterprises. Besides, ports boast high integrated logistics costs, low productive service level and high expenses such as miscellaneous fees (loading and unloading, storage and shipping), container TEU fees, customs and

企业，为避免转运周期变长影响国际信用，不得不选择转到别港，物流成本相应提高。

三、人力资源结构、政策等方面存在不足

当前，仍存在着高素质劳动力数量不足，劳动力资源闲置、错配以及人才引进保障措施不到位等问题。2019 年贸促会问卷调查显示，受访企业对人力资源环境评价为 4.018 分，在 12 个一级指标中评价最低；较满意及以上企业占比仅为 72.8%，其中，外向型人才的可获得性企业较满意以上占 66.5%。

（一）高素质劳动力数量不足

我国是一个人口大国，充足的劳动队伍是我国经济持续发展的动力之一，但是劳动力的素质较低也是影响产业升级和经济发展的重要因素。多年来，我国高等教育不断扩招，壮大了高学历人才队伍，但是与我国庞大的人口总量和产业高端化需求相比，人才数量仍然不足，集中表现为高素质人才数量与高质量经济发展需求不匹配和人力资本综合效率与产业升级需求不匹配。一方面，近年来我国一些地区高等教育缩招影响逐渐显现，高质量发展所需的高素质人才数量整体增长放缓。例如，一些地区不断限制初中升高中比例，部分大学进一步缩减本科生比例，这种精英化教育方式不仅与提升整体人口素质的需求不符，更与我国迈入高质量阶段面临的人力资本提升需求不符，在一定程度上制约了全行业劳动力素质的提升。特别是，越到基层，人口素质提升的停滞给当地营商环境改善、服务质量提升、产业能力提升造成了直接且深远的影响。另一方面，我国人力资本综合效率与发达国家相比依然较低，特别是中西部地区高素质人才的缺乏制约了本地高端产业承接能力和本地产业高端化进程。从各地反映的情况看，制约人力资本综合效率提升的因素很多，比如受过高等教育和专业教育的程度不足、劳动者就业不积极、在岗员工能力提升不及时等，都制约了产业效率提高。

（二）劳动力资源闲置、错配问题明显

我国虽然是劳动人口大国，但是多年来劳动力资源的闲置与错配问题并未解决，从而限制了人均收入与产出的增长空间，难以吸进和激活高端产业的落地成长。一方面，产业迁移方向与人口流动方向逆向矛盾，劳动力资源继续保持流向沿海地区和主要城市，而工业等重要产业向低成本的中西部地区和县乡镇转移，劳动力人口不足问题较为普遍。例如，一些中西部地区的城市人口规模本身不多，与工业发展需要大量劳动力存在一定

inspection charges, customs exit charges and weighing fees. The service ability of ports is difficult to meet the surging demand for the goods, leading to the growth of clearance time and the rise of expenses on cargo loading and unloading at ports, transportation and freezing. Some high-efficient electronics manufacturers have to select the transfer to other ports so as not to affect their international reputations due to a long transshipment cycle, which will accordingly increase the logistics costs.

III.Human resources structure and policies are not sound

At present, issues, such as the insufficient number of high-quality labor forces, idleness and mismatch of labor resources, the failure to issue safeguard measures on talent introduction, still exist. According to a questionnaire survey on enterprises in 2019 by the CCPIT, the evaluation on the human resources environment was relatively low among the 12 first-class indicators, with only 4.018 points; 72.8% of the interviewed enterprises gave a rating of “relatively satisfied and above”, of which 66.5% of them felt satisfied and above about the acquisition of foreign-oriented talents.s.

i. Number of high-quality labor is insufficient

China is a country with a large population, and the sufficient labor force is one of the driving forces for its sustainable economic development, but the low quality of labor is also a key factor that affects industrial upgrading and economic development. Over the years, China has continuously increased enrollments in higher education, and expanded the team of talents with advanced degrees. However, compared with a large population and the high-end demand of industries, the number of talents is still insufficient, manifesting in the mismatch between the number of high-quality talents and high-quality economic development demands and between the overall efficiency of human capital and the demand for industrial upgrading. On one hand, the influence of enrollment decrease in higher education has gradually emerged in some regions over the past few years, leading to the slowdown in the overall growth of high-quality talents required for high-quality development. For instance, some regions constantly restrict the ratio of students upgrading from junior high schools to senior ones, while some universities further reduce the proportion of undergraduate students. Such an elite education mode does not comply with the demand for improving the country's overall population quality as well as human capital for development in the high-quality stage, and restricts the labor quality improvement of the whole industry to some degree. Particularly, at the grass-roots level, the stagnation of population quality improvement has caused a direct and profound impact on the improvement of business environment, service quality and industrial capacity in local areas. On the other hand, the overall efficiency of human capital in China is still lower than that in developed countries, and particularly the lack of high-quality talents in central and western China has restricted the high-end industrial undertaking capacity of local areas and high-end upgrading process of local industries. Based on the feedback from various regions, there are many factors restricting the overall efficiency improvement of human capital, such as insufficient reception of higher and professional education, low enthusiasm in labor employment, untimely improvement on-the-job employee competence, etc.

ii. Idleness and mismatch problems of labor resources are prominent

China is a country with a large working population, but the idleness and mismatch problems of labor resources have not yet been solved over the years, which have restricted the growth of per capita income and output, and are difficult to attract and activate the landing and growth of high-end industries. On one hand, the

矛盾，导致企业招工困难，即便有扩大产能的计划，也因劳动力不足问题被迫停止或转到其他地方。虽然有一些企业将简单工作环节下沉到农户家庭，但当农忙时，农户也无法保证提供稳定的配套，工期波动性较大。另一方面，高中低不同档次劳动力需求全部存在缺口，劳动者能力与企业需求、劳动者需求与企业福利之间错配较多，招工不足、人员流失、就业不足并存。例如，在职业工人用工方面，不少企业表示，工厂所在地职业教育资源匮乏，甚至没有一家大专职业院校，周边职业院校相关专业学生数量不足，社会招聘的技术人员多因地域或待遇问题而难以长期稳定工作；一些简单的体力劳动岗位，因存在工作强度大、工作环境差等问题，人员流动性达到 18%-20%；此外，一些员工接受专业培训的意愿也相对较低，即便由企业出资让员工参加技能培训，且还逐步增加岗位补贴，但员工培训的积极性并不高，仅有少数人愿意参加培训。

（三）人才引进保障措施不到位

近些年，各地掀起了新一波抢人热潮，推出了各种人才政策，然而与东部地区相比，中西部地区仍普遍缺少优势，一些人才政策标准也存在过度拔高问题。一方面，部分地区还缺少支持企业吸纳人才的系统政策，有企业反映大学毕业生多流向北上广深或省会城市，仅有少数学生会到边远地区企业工作，但是当地对高新技术人才引进缺乏落户、购房等政策支持，难以吸引外来人才。另一方面，部分制定了人才政策的中西部地区，虽然也可提供落户、住房、安家费、子女入学、解决配偶工作等优惠政策，但是人才专业结构，尤其是紧缺专业技术人才，往往与产业发展需求并不匹配。

四、企业融资困难仍未缓解

当前金融服务环境仍存在企业融资差别对待、融资成本和门槛高、贷款支持力度小等问题。2019 年贸促会企业调查问卷数据显示，2019 年金融服务环境总体评价较低（4.133 分），在 12 个一级指标中倒数第二；较满意及以上企业占 76.9%。

（一）企业融资存在差别对待问题

在企业融资时经常存在国企与民企、大企业与中小企业差别对待问题。一般来说，国企融资容易，私企融资较难。民企与国企在融资方面并不对等，银行对民企信贷更加谨慎，大部分银行愿意优先把款贷给经营收入稳定的国企，而不愿意贷给民企；而且，民企通常承担的是无限责任，需提供抵押担保后才能拿到贷款，加重了民企融资难、成

direction of industrial migration is contradictory with that of population migration, and labor resources continue to flow into coastal areas and major cities, while industry and other key industries transfer to low-cost central and western regions and towns and counties, leading to the shortages of the working population. For instance, the small size of the population in some cities of central and western China conflicts with the demand for a large number of labor resources during industrial development. Therefore, it is difficult for enterprises to recruit employees. Even though they have plans to expand the industrial capacity, they will be forced to suspend or transfer them to other places due to labor shortages. Some enterprises lower simple working procedures to peasant households, but when they are busy with farming, they are unable to guarantee the stable supply of supporting products, leading to a large fluctuation of work duration. On the other hand, the demand for labor of low, medium and high levels is insufficient, and the mismatch between labor competence and enterprise demands and between labor demands and enterprise welfare is prominent, while problems such as employee shortages, personnel losses and unemployment co-exist. For example, in terms of occupational workers, many enterprises said that the vocational education resources are insufficient or there are even no vocational junior colleges in places where factories are located. Moreover, the number of students studying in relevant majors is insufficient in surrounding vocational institutions, while it is difficult for technicians recruited from the society to stably work for a long time due to geographic or treatment issues. Some simple physical labor jobs even witness a personnel turnover of up to 18%-20% owing to heavy workload and poor working environment. Besides, the willingness of some employees to receive professional training is relatively low. Even through enterprises spend money on supporting employees to participate in skill training, and gradually increase job subsidies, employees' enthusiasm in attending training is still not high, and only few people are willing to take part in the training.

iii. Talent introduction guarantee measures are not in place

In recent years, a new wave of talent introduction campaign has swept across China, followed by various kinds of talent policies. However, compared with western regions, central and western China still lack advantages, and some talent policy standards are set too high. On one hand, some regions still lack systematic policies that will help enterprises absorb talents. Some enterprises reflect that most of university graduates flow into Beijing, Shanghai, Guangzhou and Shenzhen or capital cities, but only a few choose to work at enterprises in remote areas. It is difficult for these regions to attract external talents as they show little policy support for settlement and home purchase of high-tech talent introduction. On the other hand, some central and western regions have formulated favorable talent policies in settlement, housing, settling-in allowances, children's education and spouses' work, but the specialty structure of talents, particularly technical talents in scarce majors, is always inconsistent with the industrial development needs.

IV.Enterprises' financing difficulty is still not alleviated

The current financial service environment is still facing many problems, such as differentiated treatment for enterprise financing, high financing costs and threshold, insufficient support for loans, etc. According to a questionnaire survey on enterprises in 2019 by the CCPIT, the overall evaluation on the financial service environment in 2019 was relatively low (4.133 points), ranking No. 2 from the bottom among the 12 first-class indicators; 76.9% of the interviewed enterprises gave a rating of "relatively satisfied and above".

i. Enterprises encounter differentiated treatment issues during financing

The treatment differences between state-owned and private enterprises and between large and medium- and small-sized enterprises often exist during financing. Generally speaking, financing is easier for state-owned enterprises but difficult for private enterprises. Private and state-owned enterprises are not equivalent in financing, as banks are more cautious about loans for private enterprises, and most banks are willing to lend money to state-owned enterprises with stable operating revenues, but unwilling to lend money to private ones. Besides, private enterprises often undertake unlimited liabilities, and can only get loans as long as they provide

本高问题。同时，银行对小微企业的融资风险把控更加严格，专为小微企业推出的微企贷风控把关较严，基本不受理工业用地、厂房、设备作为抵押，比较倾向于商住用地作为抵押。部分政府通过出资设立基金替企业担保，可提高抵押贷款额度，但是担保门槛较高且限制规定较多，部分成长型企业较难获得担保。

（二）融资成本和融资门槛较高

融资难、融资贵、融资时间长问题一直困扰着企业发展。融资成本高不仅体现在融资费用上，还表现为融资耗费时间长、手续繁多等。内地融资成本比香港融资成本高出一半左右。银行贷款通常为一年期，但企业投资往往是长期的，不可能来年就能获得收益，因此企业需要通过短期银行拆借、民间借贷等方式融资来归还银行贷款并支付利息，加上这类融资方式成本相对较高，显著增加了企业经济负担。在融资评估方面，一般不同银行对应不同的评估公司，企业只要换银行贷款，就需要重新评估抵押物，价值两三百万的评估值需要一万左右的评估费用，从而增加了企业成本。在放贷时间方面，银行为避免民营企业贷款无法回收情况出现，往往会制定一系列严格的信贷审批程序，从贷款审批、授信到发放通常需要花费 3-4 个月甚至更长时间，导致中小民营企业较易错过最佳扩大规模时期。

（三）贷款支持力度不大

受限于贷款手续、贷款方向和额度限制，银行对企业，尤其是中小企业的贷款支持力度依然有限。就贷款额度而言，银行常常存在“一刀切”现象，即使企业持有的土地等抵押资产价值较高，但企业融资贷款上限却依然较低。同时，银行对民营企业，尤其是中小民营企业的贷款抵押物要求较高，同时还可能存在参考企业上年度经营业绩、压低抵押物评估价格等不合理行为。再有，由于大多中小企业轻资产经营，缺少抵押物，而银行等金融机构需要有担保抵押才能贷款，纯信用贷款额度对企业而言只是杯水车薪。此外，企业担保贷款期限较短，一般为半年，最长不超过一年，且信用担保机构基本上仅对短期流动资金贷款而不对设备等长期投资贷款提供担保。

五、一些地区产业配套保障能力不足

近年来，各地基础设施建设取得巨大成就，但不平衡问题依然存在，一些地区，尤其是西部地区基础设施仍然存在短板。

mortgage guarantees, which has aggravated enterprises' financing and cost issues. In the meantime, banks are stricter with the control of financing risks over micro and small enterprises, have specially launched the micro business loan service for micro and small enterprises. Loans with industrial land, factory building or equipment as a mortgage are basically not approved, but the land for commercial housing is often used as a mortgage. Some governments set up foundations to provide a guarantee for enterprises, and the lending quota can be raised. However, the threshold of governmental guarantees is high and there are many restrictions and regulations, so it is very difficult for some growth enterprises to obtain a guarantee.

ii. Financing costs and threshold are relatively high

The difficulty, high costs and long duration of financing have been impeding the development of enterprises. The high costs of financing not only manifest in financing expenses, but also in a long duration and various procedures. The financing costs in Chinese mainland are 50% higher than those in Hong Kong. The validity period of bank loans is generally one year, but enterprises' investments are always long-term and cannot gain returns next year. Therefore, enterprises need to repay bank loans and pay interest through short-term interbank lending, private lending and other financing ways. Due to high costs, such financing ways can significantly increase the economic burden on enterprises. In terms of financing assessment, generally different banks select different assessment companies. Therefore, enterprises that change banks for loans need to assess their mortgages once again. The assessed value of RMB 2-3 million requires assessment fees of around RMB 10,000, which has increased the costs of enterprises. Regarding the issuance of loans, to make sure loans for private enterprises can be recovered, banks will often make a series of strict credit approval procedures, so it often takes 3-4 months or even a longer time from loan approval and credit granting and to loan issuance. Small and medium sized enterprises are easier to miss the best time for scale expansion.

iii. The support for loans is not strong

Due to the restrictions in loan procedures, direction and quotas, the support of banks for enterprises, particularly small and medium sized ones, is still limited. With regards to lending quotas, banks often provide one solution to diverse problems. Even if the mortgage assets such as land held by enterprises are valuable, the cap for loans is still very low. Meanwhile, banks raise higher requirements to lending mortgages of private enterprises, particularly small and medium sized ones. Besides, banks may adopt irrational behaviors, such as referring to the operating performance in the previous year and lowering the assessed prices of mortgages. Moreover, most small and medium sized enterprises run a business with light assets and lack mortgages, but financial institutions such as banks only offer loans with the presence of mortgages. The quotas for pure credit loans are insufficient for enterprises. In addition, the duration of enterprises' secured loans is relatively short, generally half a year, and no more than one year at most. Basically, credit guarantee institutions only provide loans for short-term liquid funds, but not provide guarantees for long-term investment loans, such as equipment.

V.The guarantee capability of industrial supporting facilities is insufficient in some regions

In recent years, great progress has been made in infrastructure construction in many regions, but the imbalance issue still exists. Some regions, particularly Western China, still encounter problems in infrastructure.

（一）传统基础设施建设仍有短板

持续多年的基础设施建设已经让我国多数地区基础设施较为完备，但是随着城市功能升级、产业逐级下沉、需求发生变化等，原有传统基础设施仍有较大改进提升空间。比如，不少中西部地区三线城市还没有高铁、动车直达，飞机航线也难以覆盖，缺少快速便利的交通方式；海运方面，部分港口配套设施较落后，集运能力不足；公路方面，部分道路设计已经难以满足运输需求，道路拥堵问题较为普遍，乡镇级别道路等级不高、数量不足，道路维修周期较长，降低了运输效率；新建偏远的产业园区水、电、网、物流服务不健全，部分管路、网线承载能力不足，服务稳定性较差，影响了企业正常生产运营。

（二）新型基础设施建设亟需提升

以信息网络为代表的新型基础设施对于提升服务效能具有重要意义，但在一些地区数据处理、信息采集、网络传输等新型基础设施建设刚刚起步，仍有很大提升空间。比如，网络数据处理和传输能力不足，一些地区计算机网络数据处理和传输能力已不能满足大数据的运行需求，调用本地服务器数据和远程调用市局服务器数据时速度较慢；网络未全覆盖，网络信号不够稳定，部分较偏远地区的网络建设缺口较大；传感器等数据收集设备和配套设备布点不足，投入力度不大，影响后端大数据处理和决策效果；网络信息安全意识和能力较为薄弱，存在一定数据泄露和网络攻击隐患等。

（三）本地化产业配套能力有待加强

在一些地区，由于本地无法提供企业所需生产设备和原材料，导致企业需耗费大量人力、物力、财力从外地购买，不仅增加了企业物流成本，也影响了生产进度。比如，企业亟需的关键设备，本地无法提供合格供应商，而外地供应商无法保证及时供货且运输成本过高，只能降低产品生产标准；因当地上游配套企业不完善，需从外省购买原材料等配套产品，增加了物流成本，个别企业物流成本在占总利润的 70%。此外，一些地区尽管本地已经具有一定产业配套能力，但是整体来看当地经销商实力和品牌影响力较弱，仍处于价值链中低端位置，产品无法满足更高生产标准和需求。

（四）生活配套政策与设施不足

在一些地区，尤其是西部地区，教育领域存在师资队伍不稳、幼儿园和中小学教育

i. Traditional infrastructure construction has short boards

The long-lasting infrastructure construction has enabled most regions in China to have sound infrastructure. However, with the urban functional upgrading, gradual industrial sinks and the change of demands, the original infrastructure still has a large space for improvement. For instance, some tier-3 cities in central and western China cannot get direct access to high-speed rails and bullet trains, and airlines are seldom covered, leading to the lack of fast and convenient means of transport. In terms of marine transportation, some ports have backward supporting facilities and insufficient concentrated transportation capacity. Regarding road transportation, some road designs are difficult to meet the demand for transportation, and road digestion problems are very common, while rural roads have low grades and insufficient number, a long maintenance cycle, which have reduced the transportation efficiency. Newly-built industrial parks in remote areas have incomplete water, electricity, network and logistics services, and some pipelines and network cables suffer insufficient bearing capacity, leading to poor stability of services and affecting the normal production and operation of enterprises.

ii. Construction of new infrastructure urgently needs to be accelerated

New infrastructure represented by information network is of great significance to the improvement of service efficiency, but in some regions, the construction of new types of infrastructure, such as data processing, information gathering and network transmission, just begins, and there is still much room for improvements. For instance, the network data processing and transmission capacity in some regions is unable to meet the operational demand of big data, and the speed of calling data on local servers and remotely calling data on municipal servers is relatively slow. The network is not fully covered, and network signals are not stable enough, leaving a big gap in network construction in some remote regions. Besides, the layout of data collection devices like sensors and supporting facilities is insufficient, and the investment is low, affecting the back-end big data processing and decision-making effect. Due to the weak awareness and capability of network information security, the danger of data leakage and network attack still exists.

iii. Local industrial supporting ability needs to be enhanced

As some regions cannot provide manufacturing equipment and raw materials, enterprises must spend huge human, material and financial resources to purchase them in other places, which not only increase logistics costs of enterprises, but also affect the progress of production. For example, if local qualified suppliers are unable to offer key equipment for enterprises, and foreign suppliers are unable to guarantee prompt supply and the transportation costs are too high, what enterprises can do is to lower the manufacturing standards of their products. If local upstream supporting enterprises are not sound and need to purchase raw materials and other supporting products, the logistics costs will grow. The logistics costs even account for 70% of the total profits of some enterprises. Additionally, although some regions possess the industrial supporting capacity, local dealers with weak strength and brand influence are still in the medium- and low-end position of the value chain as a whole. Products cannot meet higher production standards and demands.

iv. Life supporting policies and facilities are insufficient

In some regions, particularly Western China, there are many problems existing in educational sector, such as unstable teacher teams, poor educational quality of kindergartens, primary and middle schools, complicated procedures and multiple proofs during school transfer of children of enterprise employees. It will be difficult for enterprises to retain talents if they cannot solve children's educational issues of high-tech talents and senior managers. In terms of transport, some industrial parks are far from the downtown and do not connect to subways, and buses come in a long duration with time limits, which may affect the on-time rate. Regarding

质量较差，企业员工子女从外地转学手续繁琐、证明繁多等问题，从外地引进的企业高技术人才及高级管理人员若无法解决子女上学问题，将不利于留住人才；在交通方面，一些工业园区离市区较远且不通地铁，公交车间隔时间长且有时间限制，准点率也有较大波动；在住宿方面，一些工业园区位置偏僻，没有规划住宿区域，员工住宿问题未能得到有效解决，难以留住员工。此外，由于一些园区规划不健全，卫生（医院）、金融（银行）、酒店、体育文化等公共服务、生活配套不完善，造成职工生活不便。

accommodation, some industrial parks are remote and fail to set up the residential area. As the accommodation issue cannot be effectively solved, it will be difficult for enterprises to retain employees. Besides, some industrial parks boast incomplete planning and unsound public services and life supporting facilities, such as sanitation (hospitals), finance (banks), restaurants, sports & culture, etc.

第六章 对策建议

针对中国营商环境存在的问题，提出如下对策建议。

一、进一步提升政府效率和技能，优化政策环境

（一）进一步提升基层工作人员服务意识、服务技能

按照高质量发展要求，加快转变思想观念，破除体制机制障碍，鼓励办事机关接地气、有担当，提高基层工作人员服务的主动性。一方面，鼓励基层服务部门敢于作为、敢于创新，针对体制机制中存在的不顺畅、不协调问题，从实际出发，大胆服务创新。针对部门之间存在的“信息孤岛”、业务重叠或相互推诿等问题，要加强信息共享建设，构建部门之间的协调沟通机制，减少企业办事繁琐环节，降低沟通成本，切实做到企业信息一次填报、各部门各环节共享。另一方面，要加快服务型政府建设，下沉办事权限，切实提高基层工作人员的办事能力和综合素质，进一步提升政府形象和企业满意度。

（二）提升政策制定科学性、系统性、精准性

加强政策全生命周期管理，把政策实施效果作为评判政府工作的重要依据。政策不能为制定而制定，要把现实需求作为制定政策的先决条件，把实际问题作为政策研制的焦点，把握住政策的调研预研阶段，从政策制定源头做好政策制定的全局统筹规划，减少低质量、无效果的文件数量，提高政策质量。同时，杜绝一拥而上地出台政策和“一刀切”地执行政策，充分考虑政策调整的社会影响，给企业留出政策缓冲过渡的时间与空间。

（三）进一步完善招商引资政策，确保政策务实到位

将产业发展的可持续性和本地化作为招商引资的出发点，杜绝功利化的简单招商和资源交换，把服务到位、承诺落地作为改进营商环境的核心。一方面，建立招商引资资

Chapter VI Recommended Countermeasures

The following countermeasures are recommended in response to the above problems in China's business climate.

I.Further improve government efficiency and skills, and optimize the policy environment

i. Further improve the service awareness and service skills of grassroots personnel

China should, in the light of high-quality development requirements, expedite the transformation of concepts and ideas, abolish impedimental systems and mechanisms, encourage relevant offices and organs to keep the common touch and assume due responsibilities, and increase the go-aheadism of grassroots personnel in providing services. On the one hand, China should encourage grassroots service departments to have the courage to act and innovate, and make bold innovations in their services based on reality to fix unsmooth and uncoordinated parts of relevant systems and mechanisms. With respect to problems such as "Information Island", overlapped functions and prevarication between departments, China should strengthen information sharing construction, build an interdepartmental coordination and communication mechanism, reduce red tapes and lower communication costs, so as to ensure that information submitted by enterprises in one go can be shared by all departments. On the other hand, China should accelerate service-oriented government construction, delegate authorities lower to grassroots offices and organs, practically improve the competence and overall quality of grassroots personnel and further enhance government image and enterprise satisfaction.

ii. Make policy formulation more scientific, systematic and accurate

China should intensify policy lifecycle management and judge government work mainly based on policy effectiveness. As policies should more be formulated to meet practical needs than for any other reason, China should conduct policy research and formulation based on practical problems, control the direction of the per-research and research on relevant policies, make an overall plan for policy formulation from the source, reduce the number of low-quality and ineffective documents and improve policy quality. Meanwhile, China should put an end to the rush for introduction of policies and the "one-size-fits-all" approach to policy execution, take into full account social impacts of policy adjustment and give enterprises time and room for buffer and transition.

iii. Further perfect policies for attract investments and ensure that policies are pragmatic and sound

China should base regional investment attraction on sustainable and localized industrial development, eliminate utilitarian investment and resource exchange, and regard the delivery of services and commitments as the core of business climate improvement. On the one hand, China should build a repository of resources for investment attraction, re-examine the status of investment attraction in existing parks, strengthen the management of buildings and land that have long been unoccupied, free up these resources and re-list idle resources such as

源库，重新审查既有园区招商状况，对于长期空楼无人、空地无厂问题，要加强管理，腾出占用资源，将闲置土地楼宇等资源重新入库。另一方面，要把兑现政策承诺作为对地方招商引资考核的基本项，清理各种违规中介代理，净化企业营商环境。

二、切实缓解企业成本压力

（一）进一步降低企业税费压力

首先，积极开展财税政策创新，探索税率结构改革，深入开展对税率种类、构成、比例研究，进一步降低企业税费压力。其次，鼓励各地结合自身财政状况，开展有针对性的税收优惠，如针对先进制造业与现代服务业，在一定时间内对未抵扣完的增值税进项税额予以退还；扩大农产品免税范围，对部分农产品流通环节免征增值税；针对重点培育的高科技企业和高技术人才，实施企业所得税和个人所得税的政策优惠等。此外，把建设廉洁型、节约型政府与收费清理整顿工作结合起来，缩减不必要开支，杜绝铺张浪费，严格规范各类行政事业性收费，坚决打击各类“乱收费”和违法中介。

（二）帮助企业降低劳动力成本上涨压力

积极开展劳动力成本动态跟踪调研，优化劳动力综合保障政策。一方面，按照逐步减轻社保压力的政策方向，结合企业经营情况，分阶段降低社保费用，制定相对灵活的社保缴费标准。另一方面，对当前经营困难的部分行业和企业，研究制定缴费优惠政策，对困难企业及其职工办理基本养老保险、职工基本医疗保险等费用，允许其按上年度平均工资的一定比例折扣作为月缴费基数。再者，加强对企业员工的在岗与失业保障，研究制定稳岗补贴、就业困难人员社保补贴、高校毕业生社会保险补贴、创业担保贷款等在岗补贴政策；完善失业保险费返还政策，对依法参保且积极稳定就业的企业，可返还其一定比例的上年度实际缴纳失业保险费；加强失业员工培训力度，扩充一批可再就业劳动力，充实企业可用工规模。

（三）适度降低企业用电用能成本

合理规划和配置产业与能源配置，从各环节提高电力能源保障效率，降低收费水平。首先，要加强产业园区建设布局的电力能源保障，依据园区功能定位、产业布局、容纳规模、消耗水平等，提前配置电力能源指标和保障能力，增强能源保障水平。其次，加强电力降费与供给保障，降低电网环节收费，鼓励开展区域自建发电站和企业发电设施

land and buildings in the repository. On the other hand, China should step up its efforts to identify fulfillment of policy commitments as a basic measure of local investment attraction, clean up various illegal intermediaries and agencies to purify the business climate for enterprises.

II.Practically relieve the pressure on enterprises from costs and expenses

i. Further reduce the pressure on enterprises from taxes and dues

Firstly, China should actively make innovations in fiscal and tax policies, explore the way to carry out the tax rate structure reform, deepen the research on categories, composition and proportion of tax rates and further reduce the pressure on enterprises from taxes and dues. Secondly, it should encourage local governments to offer targeted tax incentives based on their respective finances, for example, refunding VAT input taxes that have not been deducted within a specific period of time to enterprises engaged in advanced manufacturing and modern services; expanding the scope of tax exemption for agricultural products and exempting VAT on the circulation of some agricultural products; offering corporate and individual income tax allowances to specially cultivated high-tech enterprises and personnel; etc. Additionally, China should combine the construction of a clean and economical government with inspection and rectification of fee collection, cut unnecessary spending, put an end to extravagance and waste, strictly regulate various administrative service fees and crack down “unauthorized collection of fees” and illegal intermediaries.

ii. Help enterprises reduce the pressure from rising labor costs

China should actively conduct follow-up and survey on changes in labor costs and optimize the comprehensive labor protection policy. On the one hand, China should lower social security contributions stage by stage based on business operation of enterprises and in the policy direction of gradually reducing social security pressure, and establish relatively flexible standards for social security contribution. On the other hand, China should study and formulate a preferential contribution policy for some industries and enterprises running into trouble for the time being, and allow troubled enterprises and their employees to pay basic endowment insurance and employees’ basic medical insurance contributions according to such a monthly contribution base that is a certain percentage of the average wage in the previous year. Moreover, China should strengthen on-the-job and employment security for enterprise employees, study and establish on-the-job subsidies such as stabilization subsidies, social security subsidies for people with difficulties in finding jobs, social security subsidies for college and university graduates and guaranteed loans for entrepreneurship; perfect the policy of refunding unemployment insurance contributions and refund a certain percentage of actually paid unemployment insurance contributions to enterprises that purchase the insurance according to law and actively ensure stable employment; enhance training for unemployed workers, expand the labor force that can be re-employed and increase the labor available to enterprises.

iii. Properly lower enterprises’ electricity and energy costs

China should make reasonable industrial and energy planning and allocation, increase electrical energy security efficiency in various links and lower the tariff level. First of all, China should strengthen electrical energy security for construction layout of industrial parks and allocate electrical energy indicators and security capacity in advance based on functional orientation, industrial layout, available size and consumption level of industrial parks, so as to increase the level of energy security. Secondly, China should strengthen tariff reduction and power supply guarantee, reduce grid-related charges, encourage the construction of regional self-built power stations and enterprise power generating facilities to increase sources of power supply, and pull for power trading. Thirdly, China should perfect the pricing mechanism for natural gas and other energy resources, strictly appraise and fix city gas distribution prices and regulate unreasonable charging behaviors of gas enterprises; support the transformation from indirect to indirect supply for major natural gas users to reduce intermediate gas

建设，充沛电力供给源，鼓励开展电力交易。第三，要完善天然气价等能源价格形成机制，从严核定城市燃气配气价格，规范燃气企业不合理收费行为；支持天然气大用户改转供为直供，减少供气中间环节，对直供用户天然气管输价格可在政府定价基础上由供需双方协商下浮；支持城镇燃气经营企业制订具体气价优惠方案，采取减免燃气工程安装费、季节差价或阶梯价格等方式实施优惠，切实降低企业用气成本。

（四）着力解决物流运输成本过高问题

把制度优化、基建完善和技术升级作为三大主攻方向，多方合力解决物流运输过高问题。首先，要加强物流运输制度建设，深化综合行政执法改革，推动交通物流领域简政放权，优化物流行政审批程序，着力治理乱收费、乱罚款、乱审批现象，加快推进审批管理的网络办理，降低运输费用收费水平，实施错峰通行优惠收费。其次，要加强物流运输基础设施建设，围绕物流通道、物流枢纽、集疏运体系等关键领域，加快交通网络补充建设，调整运输航线布局管理，提高交通道路仓储运输能力。最后，要加强物流运输技术升级，通过运输信息化、智能化管控升级降低管理成本，通过基础设施与运输装备的智能化升级提高运输效率，全方位提升物流运输综合能效。

三、大力培育人力资本优势

（一）坚持高等教育和职业教育并重，全面提升劳动力素质

通过高等教育大众化和职业教育社会化两条路径，全面提高劳动力人口素质，为产业升级发展提供坚实的人力资本保障。一方面，我国已经建成全球最大规模的高等教育体系，高等教育毛入学率已经超过 50%。应持续保持高等教育的规模增长和质量提升，进一步优化高等教育体系结构，壮大高等教育规模，为经济发展提供更多高素质人才。另一方面，要加强多元化、多层次、多主体的社会化职业教育体系建设，突出政府在职业教育中的引导和服务作用，发挥企业作为职业教育需求牵引的推动作用，鼓励多方建设职业院校和培训机构，通过培训基金、专项经费、企业入校、定向培养、在岗培训等不同手段，做好保障支撑。

（二）多措并举缓解劳动力缺口，扩充劳动力就业队伍

一方面，全面评估产业对劳动力的需求水平，认真研究劳动力人口流动变化趋势，建立劳动力长期需求缺口预警机制，及时调整劳动力就业政策。另一方面，要提高劳动

supply links and on the basis of government pricing, lower the gas pipeline transmission prices paid by users of directly supplied gas upon negotiation between the supply and demand sides; support urban gas enterprises in making specific preferential gas price schemes, executing these schemes through reduction and exemption of gas engineering installation fees, seasonal price differences or tiered pricing, so as to practically reduce enterprises' gas costs.

iv. Vigorously solve the problem of too high logistics transportation costs

China should focus on system optimization, infrastructure improvement and technology upgrading, and make concerted efforts to solve the problem of too high logistics transportation costs. In the first place, China should strengthen the construction of the logistics transportation system, deepen the comprehensive reform of administrative law enforcement, push forward streamline administration and decentralization in the field of transportation & logistics, optimize administrative examination and approval procedures for logistics, put an end to unauthorized fees, fines and approvals, quicken online handling of examination and approval administration, lower the level of transportation expenses and practice preferential charges for off-peak transportation. Secondly, China should strengthen logistics transportation infrastructure construction, accelerate the construction of a supplementary transportation network by focusing on key areas such as logistics channels, logistics hubs and collecting and distributing system, make adjustments to shipping route layout management and improve the storage and transportation capacity of traffic roads. Finally, China should enhance the upgrading of logistics transportation technologies, reduce management costs through information-based and intelligent transportation management upgrading, increase transport efficiency through intelligent upgrading of infrastructure and transportation facilities, and raise the comprehensive energy efficiency of logistics transportation in all aspects.

III.Energetically develop human capital advantages

i. Attach equal importance to higher education and vocational education, and comprehensively improve labor quality

China should comprehensively improve the quality of the workforce through popularization of higher education and socialization of vocational education, so as to provide a solid human capital guarantee for industrial upgrading and development. On the one hand, China has built the world's largest higher education system, with the gross enrollment rate of higher education already exceeding 50%. We should continue to maintain scale growth and quality improvement of higher education, further optimize the structure of the higher education system, increase the scale of higher education and cultivate more high-quality personnel for economic development. On the other hand, China should strengthen the construction of a diversified, multi-layered and multi-participant socialized vocational education system, underline the guiding and serving role of the government in vocational education, allow play to the promoting role of enterprises as a drive of vocational education demand, encourage cooperation in building vocational colleges and training institutions, and provide guarantee and support by such means as training funds, ear-marked funds, introduction of enterprises into colleges and universities, directed education and on-the-job training.

ii. Take proper measures to ease the labor gap and expand the workforce available for employment

On the one hand, China should make an overall assessment of industrial demand for labor, carefully study the trend of labor force movement and variation, establish an early warning mechanism for long-term labor demand gap and adjust the labor employment policy in time. On the other hand, China should raise the gradient satisfaction of the workforce and industrial labor demand, increase high-tech employment, guarantee the base of general employment, expand flexible employment, reserve employment space and opportunities for gradient upgrading and transformation of the workforce at different employment gradients, and form a multi-layered

力人口与产业劳动需求的梯度满足度，提升高技术劳动力就业数量，保障一般劳动力就业基数，扩容灵活就业人口数量，为不同梯度劳动力就业人员保留梯度升级和转换的就业空间和机会，形成多层次的劳动力就业队伍。此外，要适度放宽高层次和急需人才引进政策，形成外部人才引进补充机制。

（三）增强就业预期，拓宽就业创业渠道

强化政府在稳定就业预期的宏观引导作用，以宽松的人才政策和产业吸引力缓解劳动力流失问题，拓宽就业创业渠道。引导树立新时代就业文化观念，鼓励劳动者面向实业就业，提高体力劳动者社会地位和就业保障水平，强化实施体力劳动者健康专项保障计划，壮大新时代高水平产业工人就业队伍。要进一步放开人才引进政策，特别是中西部及产业集中承接区域，放宽不同层次人才引进政策标准，开通人才引进绿色通道，协助企业做好人才引进快速办理手续，解决企业和人才后顾之忧。要扩充就业创业渠道，做好社会创新的政府辅导帮扶工作，开展“斜杠”就业者行动，鼓励劳动者从事多种兼职工作，丰富社会就业缓冲空间。

四、合力破解企业融资难题

（一）回归产融结合初心，提高金融普惠能力

持续加强金融支持实体经济的政策导向和落实力度，把产融结合程度、降低企业融资成本作为金融服务环境的考核项，增强金融资本的覆盖面，提高金融对经济的普惠程度。一方面，要建立产融对接机制，通过建立企业融资联席会议制度、银企对接活动、金融机构推介洽谈会等形式，搭建银企对接平台，提高企业和金融机构的互动频率，增进金融机构对企业的了解程度。另一方面，要增强金融领域的普惠导向，扩展金融服务领域，延伸金融服务触角，加强对中小微企业的金融服务保障，提升金融促进实体经济发展和稳定社会运行的综合能力。

（二）适度放宽融资条件，降低企业融资成本

进一步完善企业融资条件，降低企业融资成本。首先，要加快完善企业征信体系，促进央行、税务、工商、海关、司法等部门信息互联互通，打造企业征信“大数据库”，并以此为基础作为评判企业融资资质和违约风险考量基础。其次，要规范和优化业务流程，

workforce. Additionally, China should appropriately relax the policy for introduction of high-level and urgently needed personnel and form a supplementary external personnel introduction mechanism.

iii. Increase employment expectations and broaden channels for employment and entrepreneurship

China should strengthen the role of the government in providing macro guidance for stable employment expectations, alleviate the problem of labor loss through relaxed personnel policy and industry attractiveness, and broaden channels for employment and entrepreneurship. China should guide the establishment of new cultural values on employment, encourage laborers to be industry-oriented in employment, improve the social status and employment security for manual workers, strengthen the implementation of the special health security plan for manual workers and expand the high-level industrial workforce in the new era. China should further relax its personnel introduction policy, especially in central and western China and industrial undertaking concentration areas, relax polices and standards for introduction of talented personnel of different levels, open green channels for personnel introduction, assist enterprises in quickly handling personnel introduction procedures and relieve worries of enterprises and personnel. China should broaden channels for employment and entrepreneurship, provide effective government guidance and support for social innovation, launch the "Slash" workforce campaign and encourage laborers to engage in different part-time jobs to increase the buffer space for employment in society.

IV.Make concerted efforts to solve financing problems facing enterprises

i. Resume the original intention of industry-finance combination and improve financial inclusion capacity

China should continue to strengthen policy guidance and execution of finance supporting the real economy, identify industry-finance combination and lower financing costs as a measure of the financial services environment, increase the coverage of financial capital and make finance more beneficial to economy. On the one hand, China should establish an industry-finance combination mechanism, build a bank-enterprise cooperation platform through the establishment of a joint conference system for corporate financing, bank-enterprise connections, financial institution recommendation meetings and other forms, increase the frequency of interactions between enterprises and financial institutions and enhance financial institutions' understanding of enterprises. On the other hand, China should guidance for financial inclusion, expand the scope of financial services, extend the reach of financial services, strengthen financial service guarantee for micro, small and medium-sized enterprises and improve the comprehensive capability of finance in promoting the development of the real economy and stabilizing social operation.

ii. Properly relax financing terms to reduce enterprises financing costs

China should further improve financing terms applicable to enterprises to reduce their financing costs. Firstly, China should accelerate the perfection of the enterprise credit system, facilitate information interconnection among the central bank, tax, industrial and commercial, customs, judiciary and other authorities, build a large enterprise credit database and on this basis evaluate financing qualifications and default risks of enterprises. Secondly ,China should regulate and optimize service processes, place fee collection by guarantee, evaluation, registration, audit and other intermediaries under strict supervision, establish a mutual recognition and trust system for evaluation reports issued by qualified evaluation agencies and optimize and simplify repeated links to reduce enterprises' repeated evaluation costs. Finally, China should carry out technology innovation in

严格规范担保、评估、登记、审计等中介机构服务收费，对有资质的评估机构出具的评估报告要建立互认互信制度，优化精简重复环节，减少企业重复评估成本。最后，要开展金融领域的科技创新，探索基于大数据、区块链、人工智能等技术的业务管理与风险预警机制，打通数据、风控、增信、资金等业务节点中的数据信息，推动数字金融生态体系的完善，实现金融业务流程化、批量化、智能化，降低金融经营成本与风险水平。

（三）增强贷款力度，创新企业融资渠道

把贷款投放质量绩效作为银行放贷的重要目标，通过调整贷款限制、丰富金融产品、优化贷款周期等方式，提高贷款对企业的支持力度和实施效率。首先，银行要以现实紧迫需求和普遍需求作为优先贷款方向，根据不同类型企业性质调整贷款抵押物和抵押额度，特别是要针对民营企业、中小微企业适度增加贷款额度。其次，要在严控金融风险和降低杠杆率的前提下，不断扩充金融产品，丰富融资渠道，针对行业属性、企业规模、资产特质、融资需求的差异，创新适合更多中小微企业的融资方式。最后，要优化贷款周期，针对民营企业贷款“多、急、频”等特点，建立适应其特点的信贷管理和评审制度，优化办理程序和材料，尽量缩短办理时间，延长放贷时间，提高贷款资金在实体经济中的运转效率。

五、进一步提升产业配套能力

（一）下沉传统基础设施建设，提升公共服务能级

加快基础设施建设与产业迁移协同布局进程，加大基础设施短板建设力度，全面提升公共基础服务能级。加强基础设施规划引领，围绕产业布局情况系统优化基础设施空间布局、功能配置、规模结构，创新完善覆盖规划、设计、建设、运营、维护、更新等各环节的全生命周期发展模式。加快补齐基础设施短板，积极发展大容量地面公共交通，加快调度中心、停车场、充电桩以及旧城改造建设；加快完善道路物流运输网络系统，提升道路网络密度，提高产业园区道路网络连通性和可达性；加强产业园区供水、污水、雨水、燃气、供热、通信等各类管网建设、改造和检查。加强基础设施建设的绿色化和安全性水平，按照高水平基础设施建设要求，提高建筑设施绿色低碳节能水平，提高基础设施安全可靠性水平。

the field of finance, explore service management and risk early-warning mechanisms based on technologies such as big data, blockchain and AI, make available data and information in service nodes such as data, risk control, credit enhancement and capital, promote the perfection of the digital financial ecosystem, make financial services process-based, batched and intelligent, and reduce operating costs and risks of finance.

iii. Increase lending and break new ground in enterprises' financial channels

China should identify the lending quality performance as an important target of bank loans and improve the support and efficiency of loans to enterprises by adjusting loan restrictions, diversifying financial products, optimizing loan maturities and other means. Firstly, banks should give priority to immediate needs and common needs when issuing loans, vary collateral for loans and the line of credit according with the type and nature of an enterprise, and increase the line of credit for private and micro, small and medium-sized enterprises. Secondly, banks should continue to launch more financial products and on the premise of strictly controlled financial risks and lower leverage ratios, constantly expand the range of financial products, broaden financing channels and develop new ways of financing for more micro, small and medium-sized enterprises based on differences in industry attribute, enterprise size, asset trait and financing demand. Finally, banks should optimize loan maturities, establish a credit management and evaluation system tailored to characteristics of loans for private enterprises, which loans are “numerous, urgent and frequent”, optimize handling procedures and materials, minimize handling time, extend the terms of loans and increase the operating efficiency of loans in the real economy.

V.Further improve industrial supporting capacity

i. Delegate traditional infrastructure construction to grassroots authorities and improve public service capacity

China should expedite synergetic layout of infrastructure construction and industrial transfer, step up its efforts to the improvement of weak infrastructure links and comprehensively improve the capacity of public basic services. China should strengthen infrastructure planning and guidance,= systematically optimize the spatial layout, function configuration and scale structure of infrastructure based on industrial layout and create a sound lifecycle development model covering various links such as planning, design, construction, operation, maintenance and upgrading. China should quicken the improvement of weak infrastructure links, actively develop high-capacity ground public transportation and accelerate the construction of dispatching centers, parking lots, charging piles and reconstruction of old cities; expedite the perfection of the road logistics transportation network system, increase the density of the road network, and improve the connectivity and accessibility of the road network of industrial parks; enhance the construction, transformation and inspection of water supply, sewage, rainwater, fuel gas, heat supply, communication and other pipe networks in industrial parks. Furthermore, China should strengthen green and safe infrastructure construction, make building facilities greener, more low-carbon and energy-efficient, increase infrastructure safety and reliability according to high-level infrastructure construction requirements.

（二）加强新型基础设施建设，加快部署基础信息网络

把以信息网络为代表的新型基础设施建设作为面向高水平发展基础设施建设重点，加强对道路、桥梁、运输、管网、楼宇的信息化改造提升，实现基础基础设施的数字化、信息化、智能化水平，建设基础设施智能管控平台，提高管理能效。加快部署建设完备的国际通信设施，加快 5G、IPv6、大数据、云计算、物联网、人工智能等新一代信息基础设施建设，提升宽带接入能力、网络服务质量和应用水平。加强网络安全防御能力建设，开展网络信息安全评估，特别是针对区域数据信息、工业数据安全、企业数据防护等加强全局性维护，严防数据泄露和网络安全攻击。

（三）加快培育产业群，提高产业配套能力

把产业集群能力培育作为提升区域竞争力的的主攻方向，逐步摆脱企业生产经营在区位布局上的孤立、割裂、封闭、低端局面，健全产业链。首先，要转变招商引资理念，有选择、有目的地开展招商工作，从单个企业的引进转向为产业链整体布局培育，既可以通过引入行业龙头企业，带动引入上下游企业形成健全产业链，也可以基于本地既有企业补充引入相关企业布局，逐步形成专业化产业集群，实现产业链综合供给能力。其次，要开展产业集群布局空间规划，对既有零散分布的企业进行重新规划调整，在存量空间上优化布局，在增量上审慎布局，对于已经难以经营或停止经营的企业，采取搬迁疏导方式腾挪产业空间；对于影响大、贡献多、配套不足的企业，需经过全面考量后择机开展产业集群布局规划；对于紧缺的原材料和零部件企业，鼓励配套建厂或实施定向税费优惠，由点到面布局产业配套能力。再者，要突出地方特性，从区位、资源、市场等多角度研究适合本地发展的产业集群，切忌盲目跟风建设所谓的高大上产业群，要因地制宜地建设专精特新实的产业集群，立足长远发展，把区域特色优势发挥出来。此外，要紧密围绕“一带一路”等重大国际合作战略部署和自贸试验区试点等制度创新成果，研制本地产业集群竞争能力提升计划，提高本地产业的国际化融入度，促进全球价值链地位的整体跃升。

（四）系统完善生活配套建设，增强就业人员归属感

坚持以人为本的服务理念，把人员需求作为配套建设的出发点，全面提高生活配套综合服务保障能力。首先，要在规划层面做好生活保障，做到生产建设与生活配套同步进行，产业能力集聚与生活配套提升协同互促，在产业集中地区科学规划生活配套设施

ii. Strengthen new infrastructure construction and accelerate the deployment of a basic information network

China should focus on the construction of new infrastructure represented by information network in the infrastructure construction oriented towards high-level development, strengthen information-based reconstruction and upgrading of roads, bridges, transportation, pipe networks and buildings, maintain digital, information-oriented and intelligent infrastructure, build an intelligent infrastructure control platform and improve management efficiency. China should accelerate the deployment and construction of complete international communication facilities, quicken the construction of new generation information infrastructure such as 5G, IPv6, big data, cloud computing, Internet of Things (IoT) and AI, improve broadband accessibility and the quality and application of network services. Also, China should enhance the construction of network security defense capacity, carry out network information security evaluation, strengthen global maintenance in respect of regional data and information, industrial data security and enterprise data protection, strictly prevent data leakage and network security attacks.

iii. Accelerate the cultivation of industrial clusters and improve industrial supporting capacity

China should promote the improvement of regional competitiveness towards the main direction of industrial cluster capacity building, gradually fix the isolated, separated, closed and low-end location layout of enterprise production and operation, and perfect the industry chain. Firstly, efforts should be made to shift concepts and ideas on investment attraction, attract investments selectively and purposefully, transform from introduction of single enterprises to cultivation in favor of the general layout of the industry chain, by either introducing leading enterprises in the industry to drive the introduction of upstream and downstream enterprises and form a sound industry chain, or bringing in relevant enterprises based on existing ones to gradually form specialized industrial clusters and develop comprehensive supply capacity of the industry chain. Secondly, China should carry out spatial planning for the layout of industrial clusters, adjust the layout of existing scattered enterprises, optimize the layout in terms of stock space and act prudently towards incremental space, and persuade enterprises that already find it difficult to operate or have discontinued operation to move out and make room for industrial space; with respect to enterprises with significant influence, great contributions but inadequate supporting facilities, carry out planning for industrial cluster layout at the right time after thorough consideration; with respect to scarce enterprises that supply raw materials and components and parts, encourage construction of supporting plants or implement directed tax preferences, and build industrial supporting capacity from "point" to "plane". Thirdly, local authorities should highlight local characteristics, study industrial clusters in favor of local development from various perspectives such as location, resources and market, abstain from blindly following suit to construct allegedly gorgeous industrial clusters, but build professional, fine, characteristic, creative and pragmatic industrial clusters based on local conditions and give play to regional features and advantages, with a view to promoting long-term development. Besides, local authorities should, based on the BRI and other major strategic arrangements for international cooperation as well as system innovation achievements like pilot free trade zones, study and develop competitiveness improvement plans for local industrial clusters, increase the internationalization level of local industries and the overall jump in the status of the global value chain.

iv. Systematically improve the construction of living facilities and enhance employees' sense of belonging

China should uphold the people-oriented service concept, carry out supporting construction based on personnel needs and comprehensively improve the ability to guarantee living facilities and integrated services. Firstly, China should provide living guarantee in terms of planning, carry out production construction and living

建设，增加生活配套设施投入力度，提高生活配套满足率和生活设置配套比例。其次，要以企业关键迫切需求作为生活配套建设的首要工作，特别是要将户籍办理、子女入学、医疗救助、配套住宅、长租公寓、通勤交通等基本且急需问题作为营商环境改进的重点考核指标，开展政府、企业、机构等多主体共同建设，切实解决企业员工的后顾之忧。第三，适时建设文体中心、安全应急中心、心理援助中心、信息服务中心等服务设施，提高员工就业安居归属感和幸福感。此外，要注重生活设施的定期安全巡检和维护，提高生活设施的安全性，避免设施安全问题。

facilities construction simultaneously, create synergy between industrial capacity aggregation and improvement of living facilities, scientifically plan for the construction of living facilities in industrial concentration areas, increase investment in living facilities and raise the fill rate and proportion of living facilities. Secondly, China should give top priority to critical and urgent needs of enterprises in the construction of living facilities, particularly identify basic and immediate needs, such as census register application, children education, medical assistance, supporting housing, long-term rental apartments and commuting traffic, as a key measure of business climate improvement and engage multiple participants, including the government, enterprises and institutions, in the construction, so as to effectively clear the worries of enterprises and employees. Thirdly, China should timely build service facilities such as cultural and sports centers, safety emergency centers, psychological assistance centers and information service centers to increase employees' sense of belonging to their jobs and life and their well-being. In addition, China should pay attention to regular safety inspection and maintenance of living facilities, increase the safety of living facilities and prevent safety problems with facilities.

鸣 谢

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