中国国际贸易促进委员会
CHINA COUNCIL FOR THE PROMOTION OF INTERNATIONAL TRADE

2021年度中国营商环境研究报告

CHINA’S BUSINESS ENVIRONMENT ANNUAL REPORT（2021）

中国国际贸易促进委员会贸易投资促进部
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编辑委员会

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前　言

一、研究背景和意义

优化营商环境是中国政府根据新形势、新发展、新要求作出的重大决策部署，中国国家领导人在若干重大场合多次强调营商环境建设工作的重要性。2021 年 2 月，习近平主席在中央全面深化改革委员会第十八次会议上表示，要发挥全面深化改革在构建新发展格局中的关键作用，完善市场准入和监管、产权保护、信用体系等方面的法律制度，加快营造市场化、法治化、国际化的营商环境，推动建设更高水平开放型经济新体制；同月习近平主席在《求是》杂志上发表署名文章，指出要根据新发展阶段的特点，围绕推动高质量发展、构建新发展格局，加快转变政府职能，加快打造市场化、法治化、国际化营商环境，打破行业垄断和地方保护，打通经济循环堵点，推动形成全国统一、公平竞争、规范有序的市场体系。李克强总理在 2021 年 1 月国务院常务会议上表示，着力优化营商环境，是更大激发市场主体活力的关键，也是应对严峻复杂形势、促进经济稳定恢复的重要举措；在 3 月的《政府工作报告》中强调，要纵深推进“放管服”改革，加快营造市场化、法治化、国际化营商环境。

通过深入推进“放管服”改革、积极完善各项法规制度、大力实施减税降费政策等措施，中国优化营商环境建设工作取得积极成效，国民经济更加稳健、发展基础更加牢固、市场主体更加活跃。2021 年，中国国内生产总值（GDP）达到 1143670 亿元，同比增长 8.1%（按不变价格计算），其中第一产业同比增长 7.1%，第二产业同比增长 8.2%，第三产业同比增长 8.2%；新办涉税市场主体 1326 万户，同比增长 15.9%；全国新办涉税市场主体日均超 3.6 万户，创近年新高。

然而，营商环境没有最好、只有更好。在肯定成绩、坚定持续优化营商环境的信心和决心的同时，也要看到，对标对表中国政府决策部署要求，对标对表国际先进，对标对表企业群众期待，优化营商环境工作仍然任重道远。优化营商环境是一项系统工程、长期工程，需要多方同向发力、主动作为、强化执行，把中国政府的好决策好政策真正转化为企业和群众的获得感幸福感安全感，转化为经济持续健康

发展的牵引力推动力保障力。为此，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”）在连续五年（自 2016 年起）开展大规模中国营商环境调查、发布年度报告的基础上，2021 年继续进行营商环境调查及报告编制工作，旨在密切跟踪、深入分析中国营商环境变化，全面客观反映营商环境建设成就及存在的问题，研提意见建议，以助力营商环境优化，进一步激发企业创造力和市场活力，促进经济社会稳定健康发展。

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

2021 年 4—8 月，促进部与研究院联合多个地方贸促会和行业分会及中国贸促会自贸试验区服务中心，组织开展 2021 年度中国营商环境企业问卷调查工作，共回收问卷 4630 份，其中线上收集 2291 份，线下收集 2339 份，云南、山东、江西、贵州、新疆贸促会收集超过 300 份，内蒙古、江苏、山西等地贸促会的问卷收集数量较 2020 年大幅提高。通过企业问卷调查，课题组获取了不同地区、行业及所有制企业的相关数据，为开展全国营商环境分析与评价提供了客观数据支撑。

（二）实地调研

2021 年 4—9 月，促进部与研究院组成调研组分赴云南、广西、黑龙江、江西、江苏等多个省区市调研，实地走访了江苏自贸区等近 20 个园区，与 270 余家企业开展座谈，得到了各地政府、协会、园区管委会和企业的大力支持。

调研组与园区管委会成员以及企业代表面对面深入交流，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

2021 年 12 月，为积极做好稳外资、稳外贸工作，进一步加强外商投资促进与保护，推动优化外商投资环境，中国贸促会与山东、黑龙江、海南联合举办优化营商环境政企对话会。各相关部门负责同志、

驻华使领馆代表、部分外国商协会代表以及企业代表参会。会议在北京和各省设主会场，搭建政企沟通交流平台，就当前经济形势、营商环境建设以及外资外贸企业遇到的问题、政策诉求进行了研讨和互动交流。课题组派员参会。

此外，调研组联合山东贸促会于2021年7月在山东15个地市举行了线上营商环境调研，与近160家企业进行座谈，掌握了丰富的一手资料。

（四）对比分析

课题组选取2021年中国营商环境相关数据与2020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（国有及国有控股企业、私营企业、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、特点与趋势，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。

（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部委在优化营商环境方面的资料。此外，云南、广西、黑龙江、江西、江苏和山东等地的贸促会及地方贸促支会等也提供了营商环境相关资料。调研组经过广泛搜集、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2020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的基础上，课题组广泛征求专家意见，结合本年度实际情况，完善了2021年度中国贸促会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，课题组将营商环境评价指标设计为12个一级指标和48个二级指标。各一级指标由二级指标加权平均得出（表0—1），综合评价由企业直接打分，取算数平均。

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、社会法治环境、科技创新环境、人力资源环境、金融服务环境、财税服务环境、海关服务环境以及企业设立和退出环境。其中，社会法治环境为 2021 年新设一级指标，海关服务环境为原“口岸服务环境”，为准确表述，对指标名称做出调整。

表 0-1　2021 年度中国贸促会营商环境评价指标及其权重设置

一级指标（12 个）	二级指标（48 个）
基础设施环境	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	居住条件（1/6）　医疗卫生（1/6）　文体设施（1/6） 教育水平（1/6）　环境保护（1/6）　社会治安（1/6）
政策政务环境	政策公平性（1/5）　政府服务效率（1/5） 政策执行力度（1/5）　官员廉洁程度（1/5） 可预见性（1/5）
社会信用环境	失信惩戒、守信奖励机制建设（1/3） 社会信用度（1/3）　征信体系建设（1/3）
公平竞争环境	市场监管（1/5）　行政垄断治理（2/5） 政府采购（1/5）　市场准入（1/5）
社会法治环境	人大立法与法律监督（1/6）　政府依法行政（1/6） 法院按期审结案件（1/6）　仲裁院按期审结案件（1/6） 法院判决与仲裁裁决执行（1/6） 知识产权保护（1/6）
科技创新环境	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） 企业科技研发投入、知识产权办理周期
人力资源环境	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） 社会专业化人才的可获得性（1/4） 创新创业人才的可得性（1/4） 人工成本占总成本比重；人工成本年均上涨幅度
金融服务环境	融资便利性（1/2）　融资渠道多元化（1/2） 融资成本占总成本比重；融资成本年均上涨幅度
财税服务环境	财税执法规范性（1/2）　申退税办理时间（1/2） 税费缴纳次数、税费缴纳耗时、总费率、总税率、出口退税到账时间
海关服务环境	货物通关（1/3）　检验检疫（1/3）　人员出入境（1/3） 出口时间（单证、边境）；出口费用（单证、边境）；进口时间（单证、边境）；进口费用（单证、边境）

企业设立和退出环境	土地获取（1/3） 环保手续（1/3） 破产手续办理（1/3） 开办企业程序、时间和费用；产权登记程序、时间和费用、施工许可办理流程、时限和费用；获得电力办理环节、申请材料、办理时限；用水、气报装办理环节；获得信贷办理环节、申请材料、办理时间；破产诉讼费率；清算回收率；企业注销材料；企业注销费用

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，课题组将 4.5 分—5 分评价为非常满意（优秀）水平，3.5 分—4.5 分（不含 4.5 分）为较满意（良好）水平，2.5 分—3.5 分（不含 3.5 分）为一般水平，1.5 分—2.5 分（不含 2.5 分）为较差水平，1.5 分（不含 1.5 分）及以下为很差水平。

四、受访企业构成

（一）七成以上受访企业为私营企业

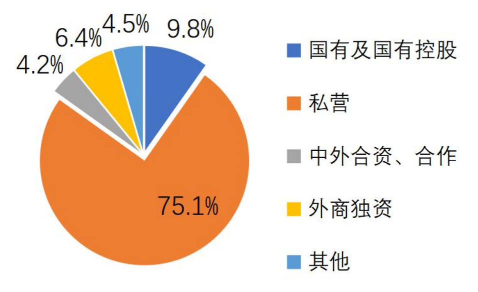


图0-1 受访企业类型分布图

本次参加调研的 4630 家企业中，75.1%的企业是私营企业；9.8%为国有及国有控股企业（以下简称“国有企业”）；6.4%为外商独资企业；其他所有制企业与中外合资、合作企业占比相近，分别占 4.5%和 4.2%。

（二）传统制造业企业占 1/3 以上

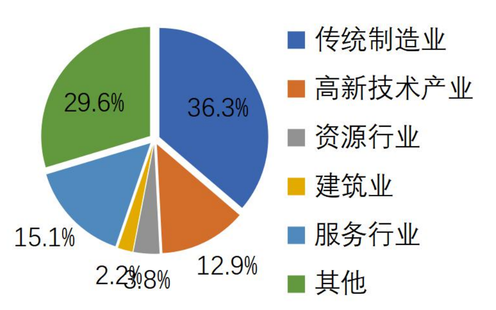


图0-2 受访企业行业分布图

本次调研中，36.3%的企业来自传统制造业； 15.1%的企业来自服务行业；12.9%的企业来自高新技术产业；3.8%的企业来自资源行业；2.2%的企业来自建筑业；29.6%的企业来自其他行业。

（三）小微企业占比超六成

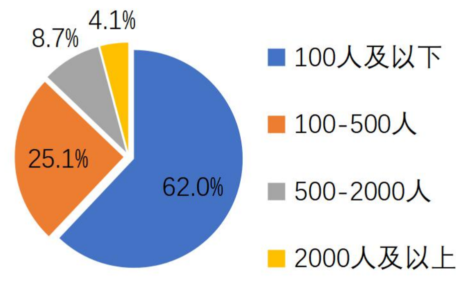


图0-3 受访企业规模分布图

本次调研中，62%的企业规模在 100 人及以下，属于小微企业；25.1%的企业规模在 100—500 人

左右；8.7%的企业规模在500—2000人左右；4.1%的企业雇员在2000人及以上，属于超大型企业。

（四）半数以上受访企业注册资本在2000万元以下

受访企业中有34.8%的企业注册资本在500万元以下；28.9%的企业在500万—2000万元之间；13.4%的企业；注册资本在2000万—5000万元之间；22.9%的企业注册资本在5000万元以上。

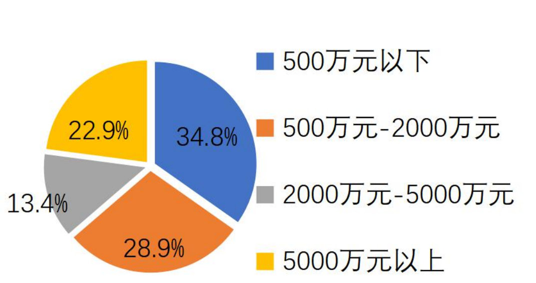


图0-4 受访企业注册资本分布图

（五）七成以上受访企业经营时间超五年

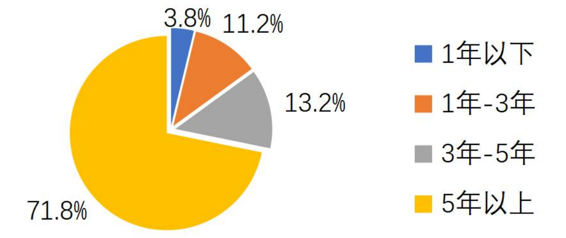


图0-5 受访企业持续经营时间分布图

本次调研中，3.8%的企业为开办不足一年的新企业；11.2%的企业创立时间在1—3年之间；13.2%的企业已连续经营3—5年；71.8%的企业经营时间在5年以上。

五、主要结论

（一）2021年企业对中国营商环境整体评价良好

2021年，受新冠肺炎疫情和经贸形势不确定性影响，中国经济发展仍面临不少风险挑战。按照党中央、国务院的统一部署，2021年，中国继续巩固拓展疫情防控和经济社会发展成果，更好统筹发展和安全，扎实做好“六稳”工作、全面落实“六保”任务，科学精准实施宏观政策，努力保持经济运行在合理区间，坚持扩大内需战略，强化科技战略支撑，扩大高水平对外开放，保持社会和谐稳定。

2021年全国营商环境评分为4.38分，与2020年相比提高0.03分，营商环境持续优化。在12个一级指标中，11个指标评价有所提高，1个指标评价略有下降。财税服务环境评价最高，其次是海关服务环境、社会法治环境和社会信用环境。人力资源服务环境、金融服

务环境评价相对较低。东部地区、中外合资合作企业及传统制造业评价较高；西部地区、其他所有制企业、资源行业和服务行业对营商环境整体评价下降。

2021年，在七成以上企业受到新冠肺炎疫情冲击的情况下，超七成企业实现收益增长，企业连续五年收益多在小范围波动。利用本地资源和开拓市场是企业投资主因，中国消费增长和中产阶级扩大取代数字技术成为最重要的商业机会。超五成受访外资企业将中国视为其全球首要投资对象，但也有28%的外资企业表示对华追加投资不在其计划内。

（二）中国营商环境持续优化

2021年全国营商环境成就主要表现为：一是有效的监管体系为简政放权提供保障；二是法治化营商环境日趋完善；三是减税降费措施成效显著，企业感受到“真金白银”的实惠；四是贸易投资便利化大幅提升；五是传统基建和“新基建”持续优化。

此外，“十三五”期间，中国营商环境持续优化，各地展开了原创性、差异性探索，形成了一批实践证明行之有效、人民群众满意和市场主体支持的改革举措和典型经验，有利促进各地互学互鉴，推动营商环境进一步优化升级。

（三）营商环境仍有改善空间

结合问卷统计结果和调研分析，课题组认为中国营商环境仍存在以下问题：一是个别地区政务服务仍存在短板；二是部分政策科学性水平待提升；三是企业生产成本显著提高；四是多地反映员工招聘困难；五是融资难问题仍然制约企业发展；六是产业配套体系仍需完善；七是国际不确定性因素增加。

（四）对策和建议

针对上述问题，结合企业调研、专家学者意见，课题组提出如下建议：一是打造优质高效的服务型政府；二是提升各项政策的科学性；三是多措并举降低企业生产成本；四是破解引才、留才、用才瓶颈；五是切实解决企业融资难、融资贵问题；六是完善产业配套体系；七是多渠道帮助企业降低不确定性风险。

第一章　中国营商环境总体评价

问卷调查显示，2021 年度中国营商环境仍在持续优化，受访企业对营商环境的整体评分为 4.38 分，较 2020 年提高 0.03 分，其中五成以上受访企业对营商环境“非常满意”，超八成企业认为营商环境“有所改善”[①]。

一、营商环境评价总体良好

（一）五成以上受访企业对营商环境“非常满意”

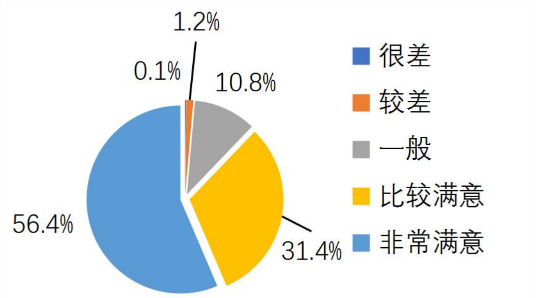


图1-1-1 2021中国营商环境满意度

2021 年企业对中国营商环境总体满意度较高，其中评价为“非常满意”的企业占 56.4%；“比较满意”的企业占 31.4%；“一般”的企业占 10.8%；“较差”的企业占 1.2%；仅 0.1%的企业认为中国营商环境很差。

（二）超八成受访企业认为营商环境“有所改善”

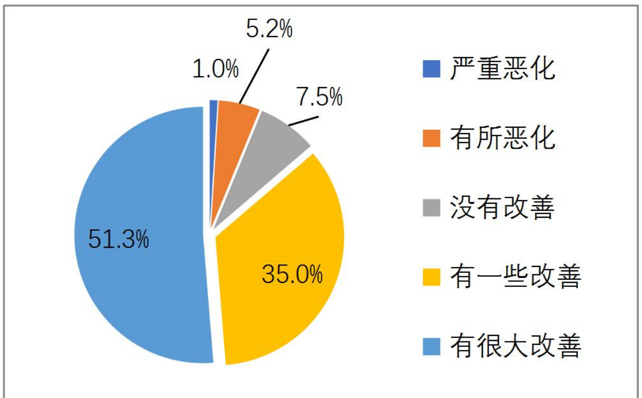


图1-1-2 近三年中国营商环境改善情况

近三年，认为中国营商环境“有很大改善”的企业占 51.3%；认为“有一些改善”的企业占 35%；7.5%的企业认为“没有改善”；6.2%的企业认为“恶化”（包括“严重恶化”和“有所恶化”），该比例略高于 2020 年（4.5%）。

[①] 注：本报告第一章、第二章、第三章中涉及的数据，主要来源于 2021 年度中国贸促会组织的营商环境企业问卷调查。

近三年，企业所在地区营商环境改善情况与中国营商环境改善情况十分相似，认为企业所在地营商环境“有很大改善”的比例为 49.8%（全国比例为 51.3%），认为“严重恶化”的比例为 1.9%（全国比例为 1%）。

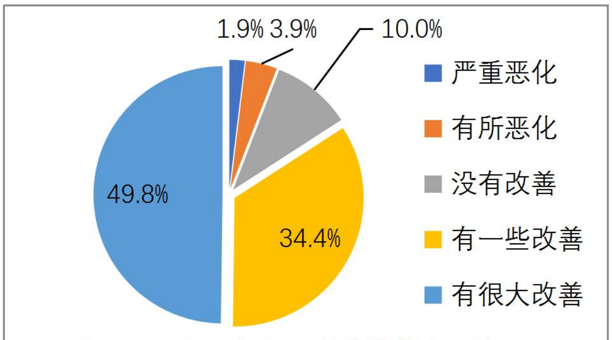
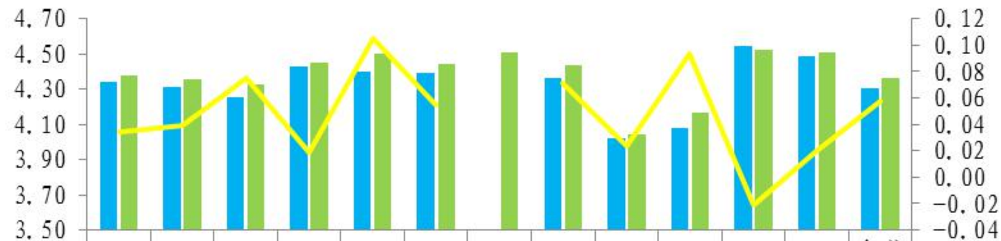


图1-1-3 近三年公司所在地营商环境改善情况

（三）财税服务评价高，人力资源环境评价低

2021 年全国营商环境评分为 4.38 分，达到良好水平。12 个一级指标均在 4.00—4.52 分区间内，表现良好。其中，人力资源服务环境评价最低，为 4.04 分，其次是金融服务环境，为 4.17 分；财税服务环境评价最高，为 4.52 分，海关服务环境、社会法治环境和社会信用环境较高，均为 4.51 分，均达到优秀水平。

与 2020 年相比，2021 年中国营商环境整体评价提高 0.03 分。其中，2021 年财税服务环境较 2020 年降低 0.02 分，但仍在 12 个一级指标中位列第一。社会信用环境提高 0.11 分；金融服务环境紧随其后，提高 0.09 分；生活服务环境和科技创新环境指标均提高 0.07 分；企业设立和退出指标评价提高 0.06 分。



	营商环境环境	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	社会法治环境	科技创新环境	人力资源环境	金融服务环境	财税服务环境	海关服务环境	企业设立和退出
2020年	4.34	4.31	4.25	4.43	4.40	4.39		4.36	4.02	4.08	4.54	4.49	4.30
2021年	4.38	4.35	4.33	4.45	4.51	4.44	4.51	4.43	4.04	4.17	4.52	4.51	4.36
差值	0.03	0.04	0.07	0.02	0.11	0.05		0.07	0.02	0.09	-0.02	0.02	0.06

图 1-1-4 2020-2021年中国营商环境细分指标评价

二、东中部评价较高，西部评价降低

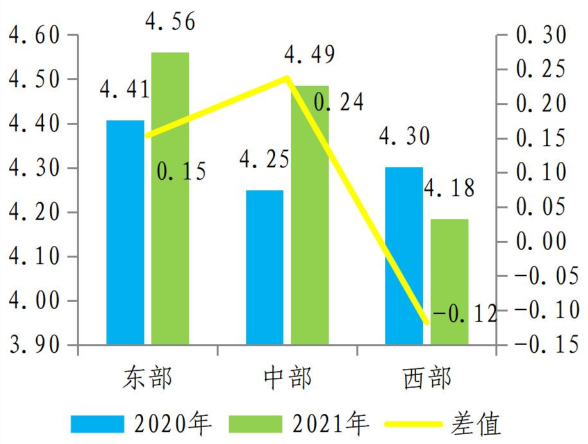


图1-2-1 不同地区企业对营商环境评价

从不同地区来看，各地区对营商环境评价有一定差异，东部地区评价最高，为 4.56 分；中部地区为 4.49 分，评价居中；西部地区最低，为 4.18 分。东部地区和西部地区评价差值为 0.38 分，差异较大。

与 2020 年相比，2021 年东部、中部地区对营商环境评价有一定提升，其中东部提高 0.15 分，中部提高 0.24 分，西部地区营商环境评价负增长，降低 0.12 分。

三、中外合资、合作企业评价高，其他所有制企业评价低

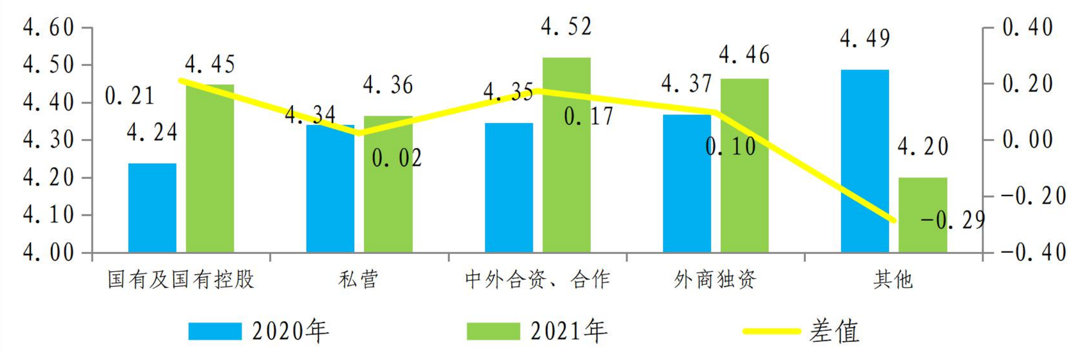
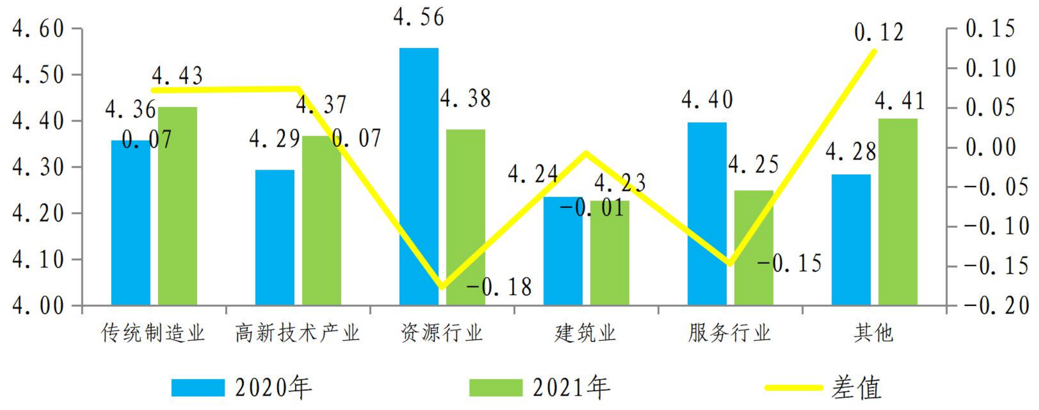


图1-3-1 不同所有制企业对营商环境评价

从不同所有制角度看，中外合资、合作企业评价最高，为 4.52 分；其他所有制企业（包括集体所有制企业、联营制企业等）评价最低，为 4.20 分，与最高评价相差 0.32 分；外商独资企业、国有企业和私营企业评分居中，分别为 4.46 分、4.45 分和 4.36 分。

与 2020 年相比，2021 年中外合资、合作企业评价提高 0.17 分；其次是外商独资企业评价，提高 0.1 分；国有企业评价提高 0.21 分；私营企业评价提高 0.02 分；其他所有制企业评价出现下降，降低 0.29 分。

四、传统制造业评价高，建筑业评价低，其他行业提升快



1-4-1 不同行业企业对营商环境评价

从不同行业角度看，各行业对营商环境的评价均在良好及以上水平，其中传统制造业评价最高，为 4.43 分；其次是其他行业，为 4.41 分；建筑业评价最低，为 4.23 分；资源行业、高新技术产业和服务行业居中，分别为 4.38 分、4.37 分和 4.25 分。

与 2020 年相比，2021 年其他行业对营商环境评价提升最多，从 4.28 分提高至 4.41 分（提高 0.12 分）；其次是高新技术产业和传统制造业，均提升了 0.07 分；建筑行业评价略有下降，降低 0.01 分；资源行业和服务行业评价有所下降，分别降低 0.18 分和 0.15 分。

第二章　营商环境细分指标评价

中国营商环境细分指标评价主要包括基础设施、政策政务及海关服务环境等12个一级指标和48个二级指标。企业问卷调查显示，2021年企业对全国营商环境总体评价良好，除财税服务环境外，一级指标均较2020年有一定提升。

一、基础设施：水电气供应评价较高，东中部评价提升

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 5 个二级指标。2021 年受访企业对基础设施环境评价总体良好，为 4.35 分，较 2020 年提高 0.04 分；但地区和行业间评价差异显著。

（一）水电气供应评价高，交通运输指标评价较低

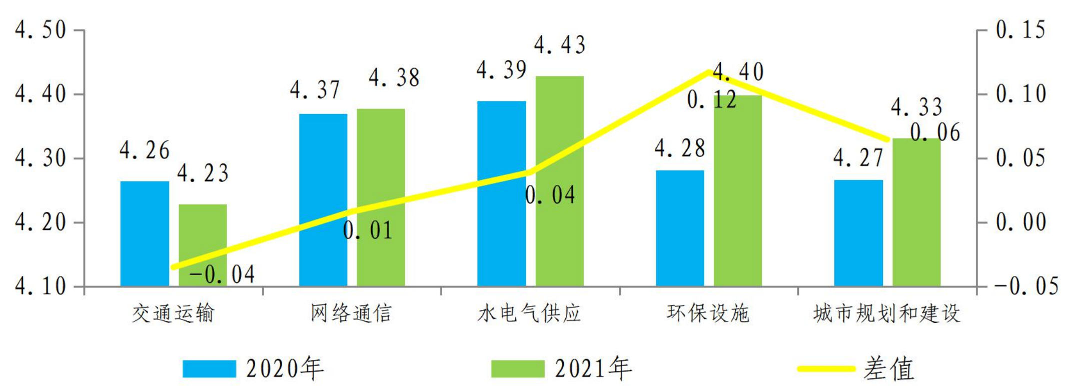


图2-1-1 基础设施环境各细分指标评价情况

从二级指标看，水电气供应得分最高，为 4.43 分；其次是环保设施，为 4.40 分；交通运输评分最低，为 4.23 分；城市规划和建设与网络通信评分居中，分别为 4.33 分和 4.38 分。

与 2020 年相比，环保设施指标评价提升最多（0.12 分），城市规划和建设与水电气供应评价紧随其后，分别提高 0.06 分、0.04 分；交通运输评价下降 0.04 分，是基础设施环境中唯一出现负增长的二级指标。

（二）东中部地区评价明显高于西部地区

分地区看，东部地区企业对基础设施环境评价最高，为4.53分，较上年提高0.13分；中部地区得分4.44分，较上年提高最多，提高0.23分；西部地区评价为负增长，较上年下降0.08分，仅4.15分。

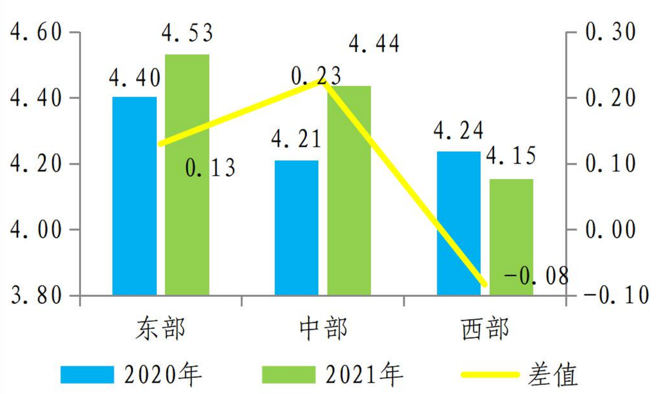


图2-1-2 各地区基础设施环境评价对比

（三）外商独资企业评价较高，其他所有制企业评价较低

不同所有制企业对基础设施环境评价有一定差异。其中，外商独资企业（4.48分）评价最高，且较上年提高0.27分，评价提升较大；中外合资、合作企业（4.47分）评价较高，较上年提高0.13分；其他所有制企业评分最低（4.14分），较上年降低0.11分；国有企业和私营企业评价居中，分别为4.38分和4.34分，分别较上年提高0.11分和0.02分。

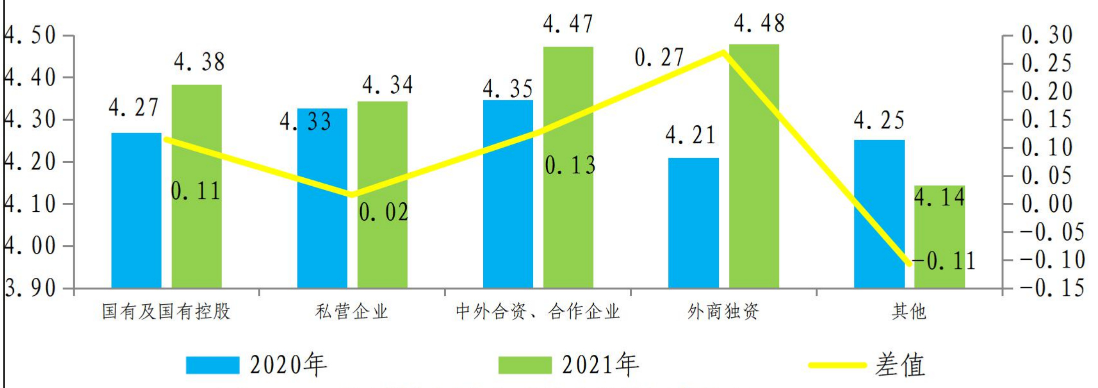


图2-1-3 不同所有制企业对基础设施评价情况

（四）传统制造业评价较高，建筑业评价较低

分行业看，传统制造业对基础设施环境评价最高，为4.40分；其次是其他行业，为4.36分；建筑业评分最低，为4.19分；资源行业、高新技术产业和服务行业三个行业评分居中，分别为4.32分、4.32分和4.27分。

与2020年相比，2021年其他行业和传统制造业对基础设施环境评价提升明显，分别提高0.14分和0.07分；高新技术产业和建筑业

略有提升，均比上年提高 0.01 分；资源行业和服务行业出现下降，分别降低 0.17 分和 0.13 分。

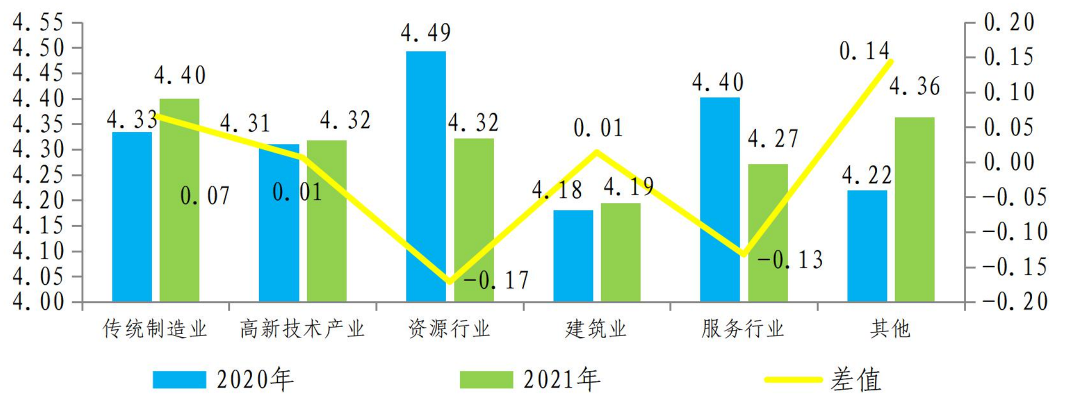


图2-1-4 不同行业对基础设施评价情况

二、生活服务：社会治安获好评，文体设施评价较低

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 6 个二级指标。2021 年受访企业对生活服务环境总体评价较低，为 4.33 分，在 12 个一级指标中排名第 10。

（一）社会治安指标评价优秀，文体设施指标评价较低

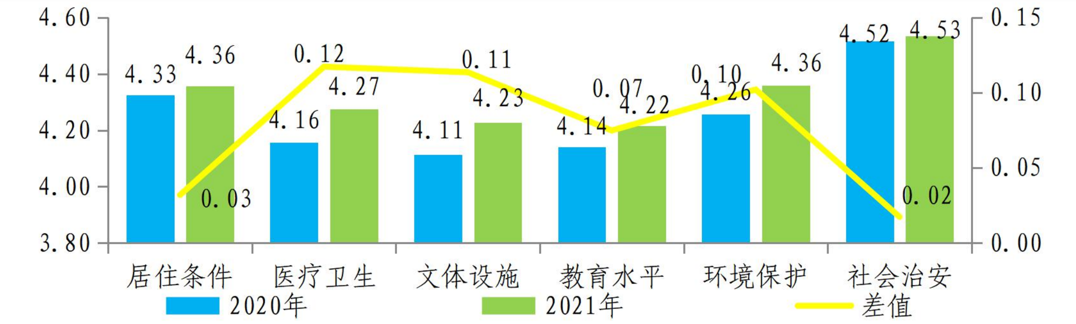


图2-2-1 生活服务环境各细分指标评价情况

从细分指标来看，社会治安评分最高，为 4.53 分，达到优秀水平；教育水平评分最低，为 4.22 分；文体设施、医疗卫生评价分别为 4.23 分、4.27 分；环境保护和居住条件评价居中，均为 4.36 分。

与 2020 年相比，医疗卫生评价提升最多（提高 0.12 分）；文体设施和环境保护评价提升较多，分别提升 0.11 分和 0.1 分；教育水平、居住条件和社会治安评价分别提高 0.07 分、0.03 分和 0.02 分。

（二）东中部地区评价高，西部地区评价低

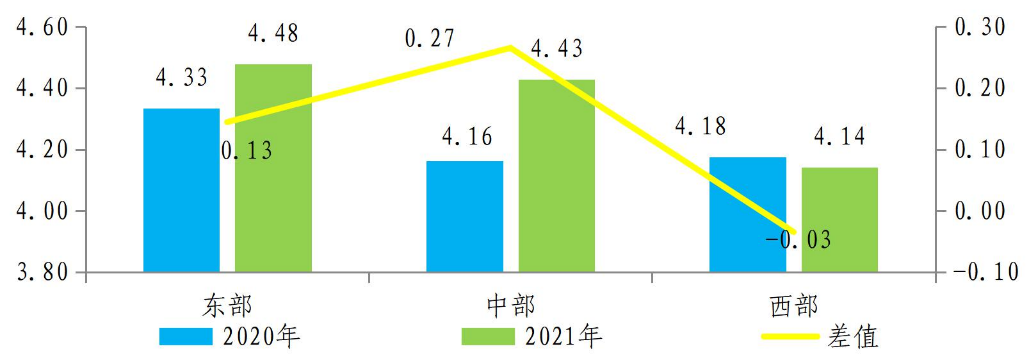


图2-2-2 各地区生活服务环境评价对比

分地区看，东部地区企业对生活服务环境评价最高，为 4.48 分，较上年提高 0.13 分；中部地区较上年提高最多，得分为 4.43 分，提高 0.27 分；西部地区评价负增长，较上年下降 0.03 分，仅 4.14 分。

（三）中外合资、合作企业评价高，其他所有制企业评价较低

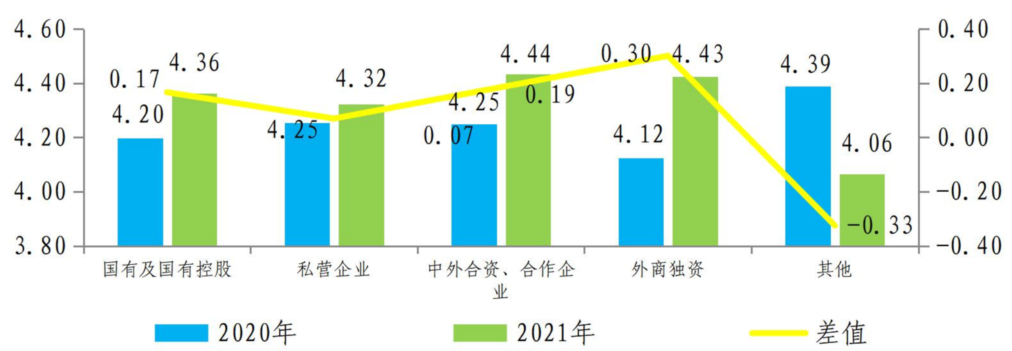


图2-2-3 不同所有制企业对生活服务环境评价情况

从所有制角度看，中外合资、合作企业（4.44 分）评价最高，较上年提高 0.19 分；外商独资企业（4.43 分）评价较高，较上年提高 0.30 分；其他所有制企业评分最低（4.06 分），较上年降低 0.33 分；国有企业和私营企业评价居中，分别为 4.36 分和 4.32 分，较上年提高 0.17 分和 0.07 分。

（四）传统制造业评价较高，建筑业评价较低

分行业看，传统制造业对生活服务环境评价分值最高，为 4.37 分；其次是其他行业，为 4.35 分；建筑业评分最低，为 4.14 分；资源行业、高新技术产业和服务行业三个行业评分居中，分别为 4.33 分、4.28 分和 4.25 分。

与 2020 年相比，2021 年各行业对生活服务环境评价差异不大。其他行业和传统制造业提升较多，分别提高 0.17 分和 0.13 分；高新技术产业评价略有上升（提高 0.02 分）；建筑业、资源行业和服务行业出现下降，分别降低 0.02 分、0.10 分和 0.10 分。

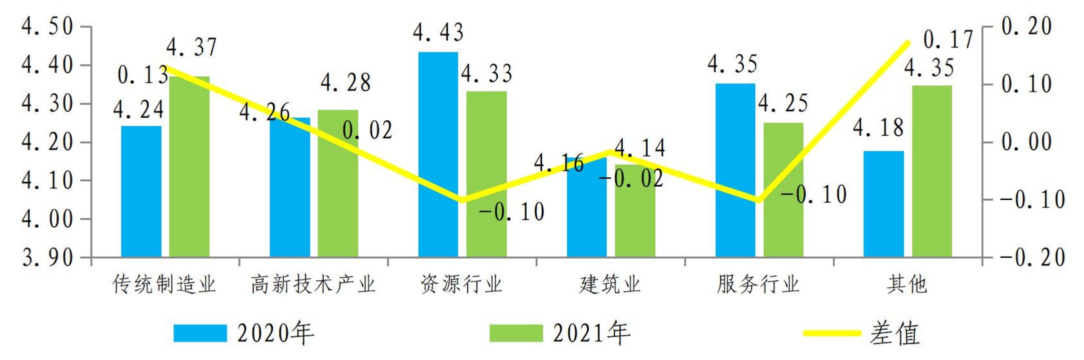


图2-2-4 不同行业对生活服务环境评价情况

三、政策政务：官员廉洁程度评价最高，多行业评价负增长

政策政务环境指标可细分为政策执行力度、政策公平性、政府服务效率及官员廉洁程度 4 个二级指标。2021 年受访企业对政策政务环境评价居中，为 4.45 分，较 2020 年提高 0.02 分，在 12 个一级指标中排名第 5。

（一）官员廉洁程度指标评价最高，政策公平性指标评价较低

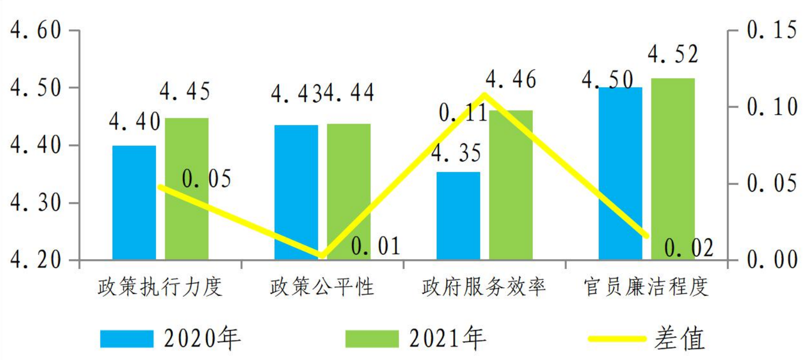


图2-3-1 政策政务环境各细分指标评价情况

从细分指标看，官员廉洁程度得分最高，为 4.52 分，达到优秀水平；其次是政府服务效率指标（4.46 分）；政策执行力度和政策公平性评价也较好，分别为 4.45 分、4.44 分。

与 2020 年相比，2021 年政府服务效率指标提升最多（提高 0.11 分），其次是政策执行力度指标，提高 0.05 分；官员廉洁程度和政策公平性分别提高 0.02 分和 0.01 分。

（二）东部地区评价高，西部地区评价负增长

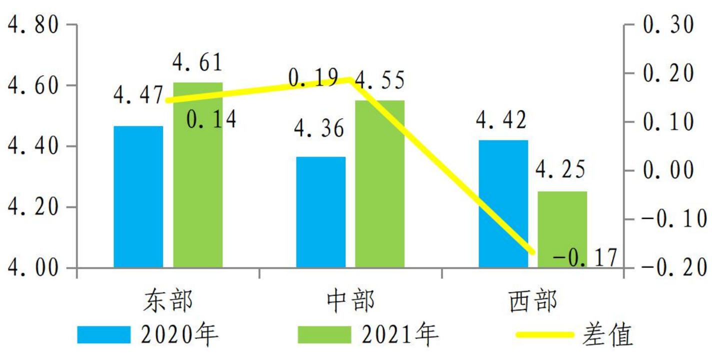


图2-3-2 各地区对政策政务环境评价

分地区看，东部地区企业评价达优秀水平，对政策政务环境评价最高，为 4.61 分，较上年提高 0.14 分；中部地区较上年提高最多，得分为 4.55 分，提高 0.19 分；西部地区评价负增长，较上年下降 0.17 分，仅 4.25 分。

（三）中外合资、合作企业评价高，其他所有制企业评价负增长

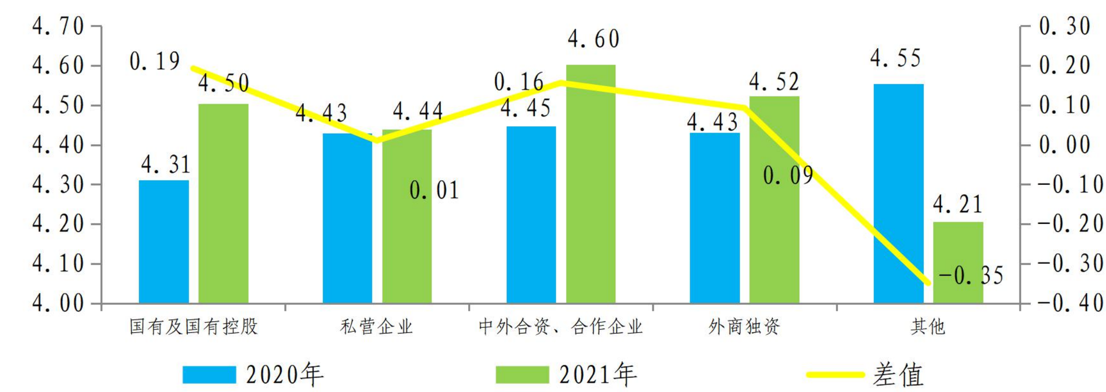


图2-3-3 不同所有制企业对政策政务环境评价

从所有制角度看，中外合资、合作企业（4.60 分）评价最高，较上年提高 0.16 分；外商独资企业（4.52 分）和国有企业（4.50 分）评价较高，较上年分别提高 0.09 分和 0.19 分；其他所有制企业评分最低（4.21 分），较上年降低 0.35 分；私营企业评价居中，为 4.44 分，较上年提高 0.01 分。

（四）传统制造业评价较高，多行业评价负增长

分行业看，传统制造业对政策政务环境评价分值最高，为 4.50 分；其次是高新技术产业，为 4.47 分；建筑业评价最低，为 4.20 分；其他行业、资源行业和服务行业三个行业评价居中，分别为 4.45 分、4.43 分和 4.33 分。

与 2020 年相比，2021 年传统制造业和高新技术产业评价提升较多，分别提高 0.08 分和 0.06 分；其他行业略有提升，比上年提高

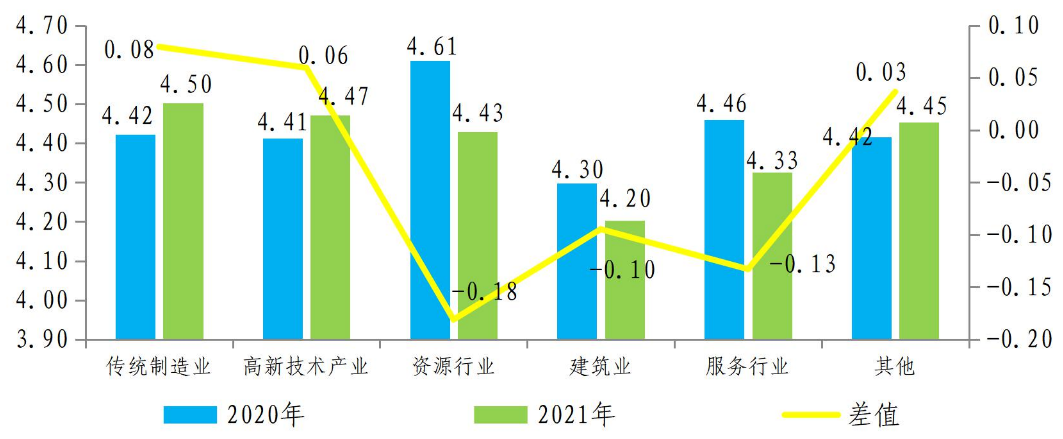


图2-3-4不同行业政策政务环境年度评价对比图

0.03 分；资源行业、服务行业和建筑业出现下降，分别降低 0.18 分、0.13 分和 0.10 分。

四、社会信用：指标评价并列第二，社会信用度指标评价高

社会信用环境细分为社会信用度、征信体系建设及失信惩戒、守信奖励机制 3 个二级指标。2021 年受访企业对社会信用环境评价总体较好（4.51 分），在 12 个一级指标中排名并列第 2 位。

（一）社会信用度指标评分高，失信惩戒、守信奖励机制建设指标需加强

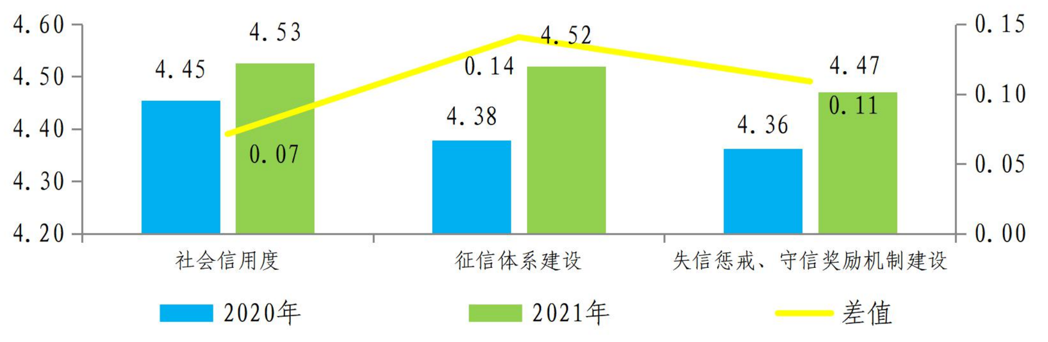


图2-4-1 社会信用环境各细分指标评价情况

从细分指标看，社会信用度指标（4.53 分）得分最高，其次是征信体系建设（4.52 分）指标，二者均达到优秀水平；失信惩戒、守信奖励机制建设评价为 4.47 分，相对较低。

与 2020 年相比，2021 年征信体系建设指标评价提升最多（提高 0.14 分）；其次是失信惩戒、守信奖励机制建设指标（提高 0.11 分）；社会信用度评价提高 0.07 分。

（二）东中部地区提升多，西部地区评价负增长

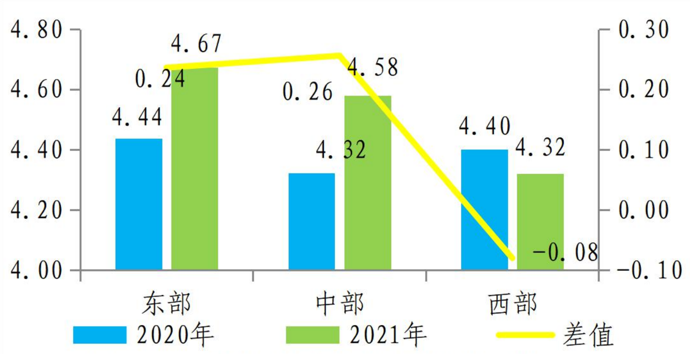


图2-4-2 各地区社会信用环境评价对比

分地区看，东部地区企业对社会信用环境评价最高，为 4.67 分，较上年提高 0.24 分；中部地区较上年提高最多，得分为 4.58 分，提高 0.26 分；西部地区评价负增长，较上年下降 0.08 分，仅 4.32 分。

（三）中外合资、合作企业评价最高，私营企业评价居中

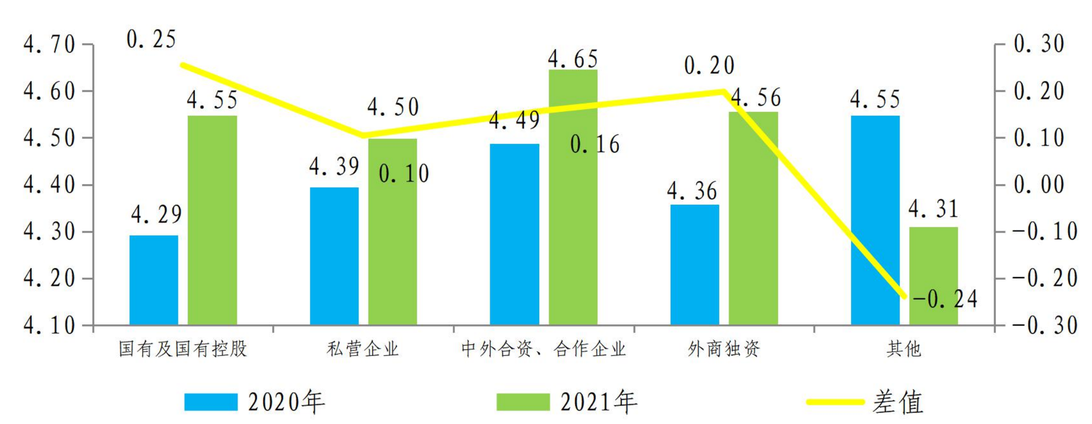


图2-4-3 不同所有制企业对社会信用环境评价对比

从所有制角度看，中外合资、合作企业（4.65 分）在不同所有制企业中评价最高，较上年提高 0.16 分；其次是外商独资企业（4.56 分）和国有企业（4.55 分），较上年分别提高 0.20 分和 0.25 分；其他所有制企业评分最低（4.31 分），较上年降低 0.24 分；私营企业评价居中，为 4.50 分，较上年提高 0.10 分。

（四）高新技术产业评价明显提高，两行业评价负增长

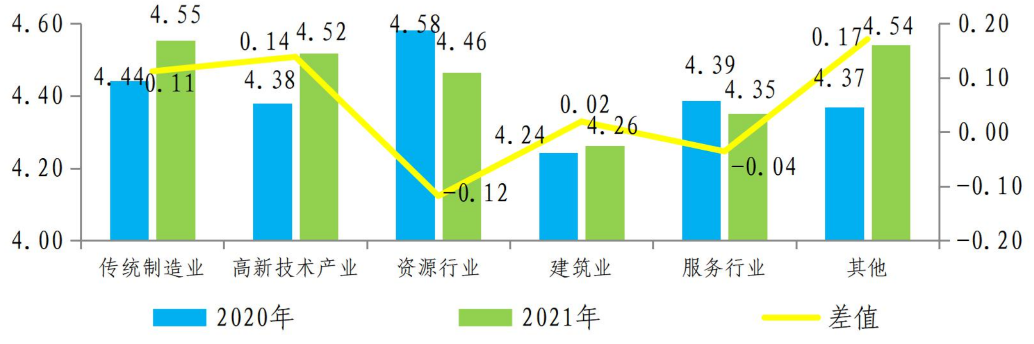


图2-4-4 不同行业对社会信用环境评价对比

分行业看，传统制造业对社会信用环境评价最高，为 4.55 分；其次是其他行业和高新技术产业，分别为 4.54 分和 4.52 分；建筑业评分最低，为 4.26 分；资源行业和服务行业评分居中，分别为 4.46 分和 4.35 分。

与 2020 年相比，2021 年其他行业、高新技术产业和传统制造业对社会信用环境评价评价提升明显，分别提高 0.17 分、0.14 分和 0.11 分；建筑业评价略有提升，比上年提高 0.02 分；资源行业和服务行业评价出现下降，分别降低 0.12 分和 0.04 分。

五、公平竞争：市场监管评价较高，两行业评价负增长

公平竞争环境细分为市场监管、行政垄断、政府采购及市场准入 4 个二级指标。受访企业对公平竞争环境总体评价良好，总体得分为 4.44 分，在 12 个一级指标中排名第 5 位。

（一）市场监管指标评价较高，政府采购、行政垄断指标评价较低

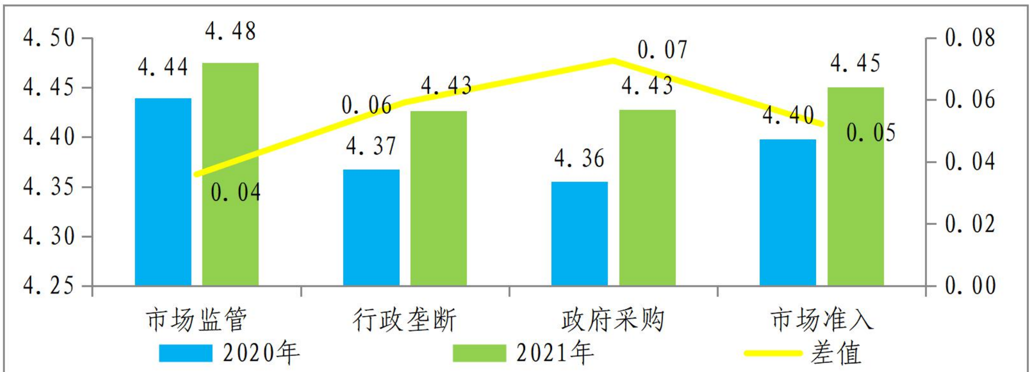


图2-5-1 公平竞争环境各细分指标评价对比

从细分指标看，市场监管得分最高，为 4.48 分；市场准入得分居中，为 4.45 分；政府采购和行政垄断得分较低，均为 4.43 分。

与 2020 年相比，政府采购指标评价提升最多（0.07 分）；其次是行政垄断、市场准入，分别提高 0.06 分和 0.05 分；市场监管评价提高 0.04 分。

（二）东部地区评价高，中部地区评价提升多

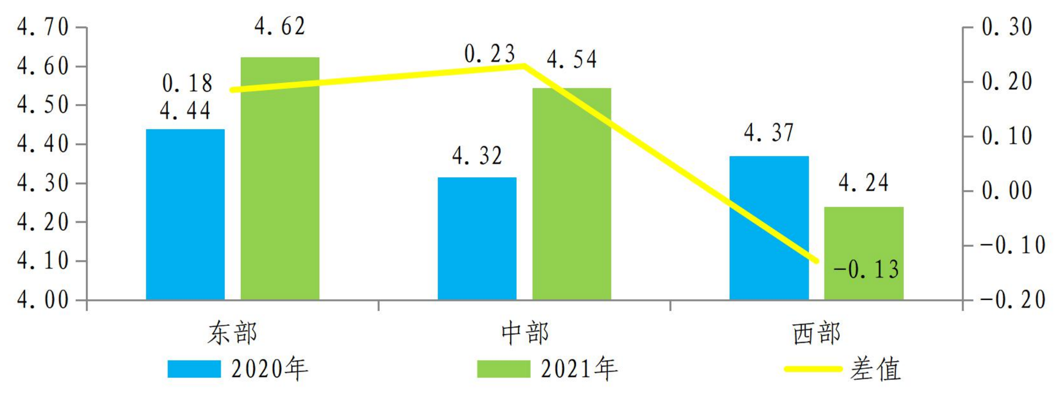


图2-5-2 各地区公平竞争环境评价对比

分地区看，东部地区企业对公平竞争环境评价最高，为 4.62 分，较上年提高 0.18 分；中部地区评价较上年提高最多（提高 0.23 分），评价为 4.54 分；西部地区评价负增长，较上年下降 0.13 分，仅 4.24 分。

（三）国有企业评价提升多，其他所有制企业评价负增长

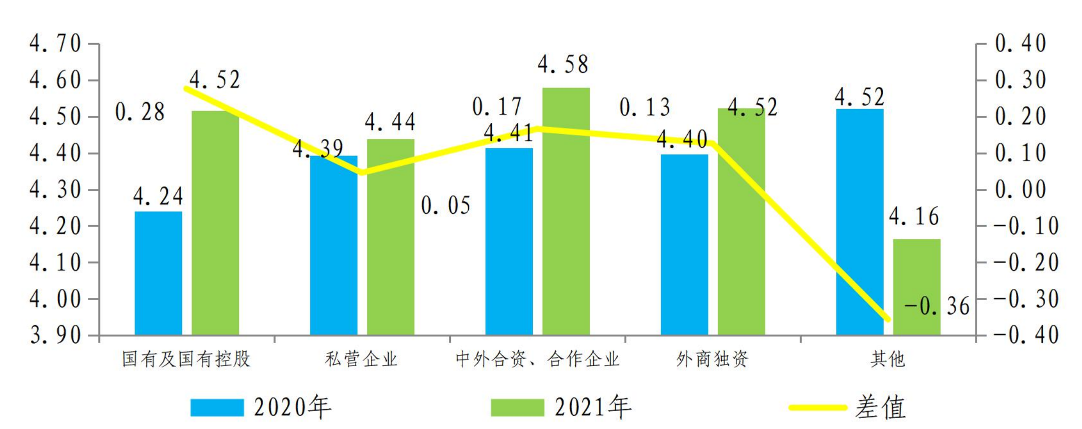


图2-5-3 不同所有制企业公平竞争环境年度评价对比图

从所有制角度看，中外合资、合作企业（4.58 分）对公平竞争环境评价最高，较上年提高 0.17 分；外商独资企业（4.52 分）和国有企业（4.52 分）评价较高，分别较上年提高 0.13 分和 0.28 分；

其他所有制企业评分最低（4.16 分），较上年降低 0.36 分；私营企业评价居中，为 4.44 分，较上年提高 0.05 分。

（四）传统制造业评价提升多，资源和服务行业评价负增长

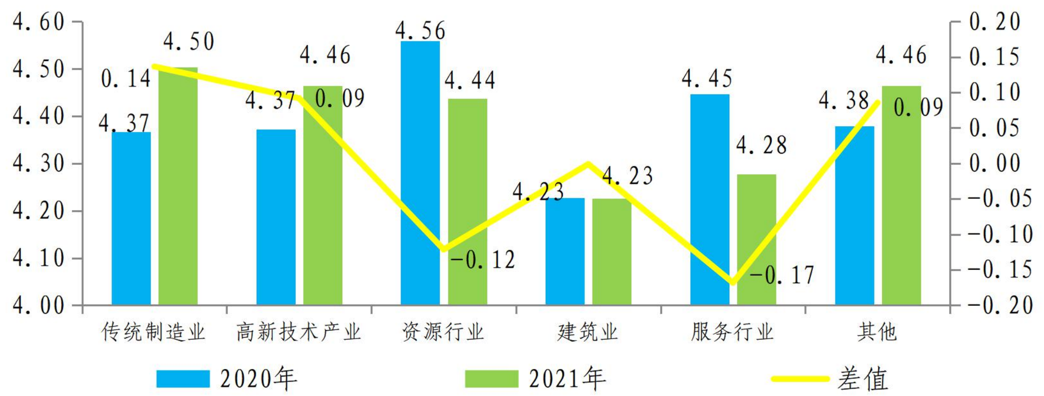


图2-5-4 不同行业公平竞争环境年度评价对比图

分行业看，传统制造业对公平竞争环境评价分值最高，为 4.50 分；其次是其他行业和高新技术产业，均为 4.46 分；建筑业评分最低，为 4.23 分；资源行业和服务行业评分居中，分别为 4.44 分和 4.28 分。

与 2020 年相比，2021 年传统制造业、其他行业和高新技术产业对公平竞争环境评价提升明显，分别提高 0.14 分、0.09 分和 0.09 分；建筑业评价持平；资源行业和服务行业评价出现下降，分别降低 0.12 分和 0.17 分。

六、社会法治：总体评价并列第二，细分指标得分相近

社会法治环境为 2021 年新设指标，可细分为法律监督、政府依法行政、法院与仲裁按期审结案件、法院判决与仲裁裁决执行和知识产权保护 5 个二级指标。2021 年，社会法治环境整体评价较好，总得分为 4.51 分，高于中国营商环境综合得分，在 12 个一级指标中排名并列第 2 位。

（一）二级指标评价相近，政府依法行政、法律监督指标评价高

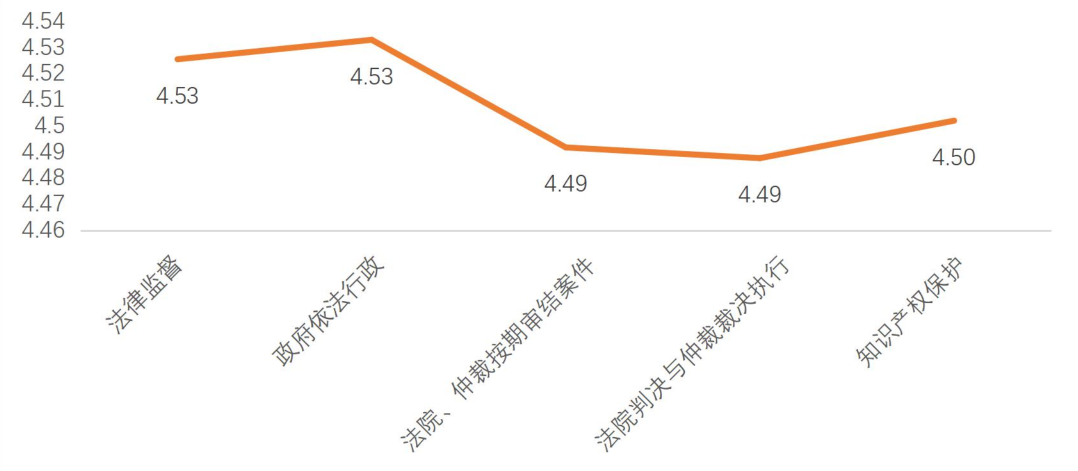


图2-6-1 社会法治环境细分指标评价

2021 年社会法治环境 5 个二级指标极差相差较小，仅为 0.04 分。其中政府依法行政和法律监督得分较高，为 4.53 分；其次是知识产权保护，为 4.50 分；法院与仲裁按期审结案件、法院判决仲裁裁决执行得分略低，均为 4.49 分。

（二）东中部地区评价明显高于西部地区

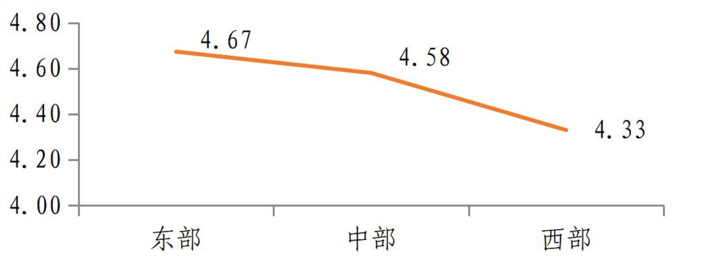


图2-6-2 各地区社会法治环境评价

分地区看，东部地区企业对社会法治环境评价最高，为 4.67 分；中部地区评价较高，为 4.58 分；西部地区最低，仅 4.33 分。

（三）中外合资、合作企业评价较高，其他所有制企业评价较低

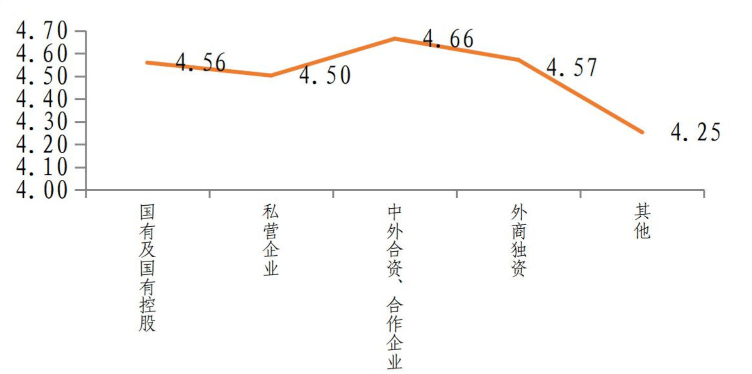


图2-6-3 不同所有制企业社会法治环境评价

从所有制角度看，中外合资、合作企业（4.66 分）对社会法治环境评价最高，外商独资企业（4.57 分）、国有企业（4.56 分）和私营企业（4.50 分）评价

居中，其他所有制企业评分最低（4.25 分）。

（四）传统制造业评价高，建筑业评价低

图2-6-4 不同行业社会法治环境年度评价对比图

分行业看，传统制造业对社会法治环境评价最高，为 4.55 分；其次是其他行业、高新技术产业和资源行业，分别为 4.54 分、4.52 分和 4.51 分；建筑业评分最低，为 4.32 分；服务行业评分居中，为 4.37 分。

七、科技创新：二级指标评价相近，国有企业评价显著提升

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 5 个二级指标。科技创新环境指标评分为 4.36 分，在 12 个一级指标中排名第 7 位。

（一）研发抵扣政策实施获较高评价，产学研结合、创业孵化服务评价低

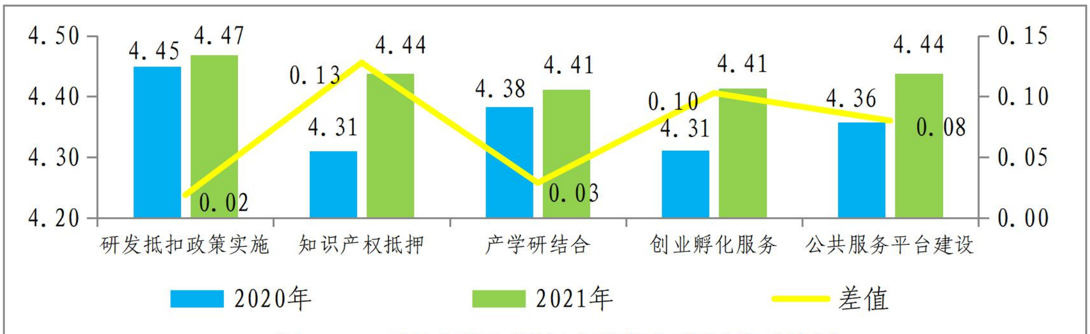


图2-7-1 科技创新环境细分指标年度评价对比图

科技创新环境 5 个二级指标得分相近，极差仅为 0.06 分。其中，研发抵扣政策实施得分最高，为 4.47 分；其次是知识产权抵押和公共服务平台建设，均为 4.44 分；产学研结合和创业孵化服务评价稍低，均为 4.41 分。与 2020 年相比，2021 年知识产权抵押指标提升

最多（0.13 分）；其次是创业孵化服务（0.10 分）和公共服务平台建设（0.08 分）；产学研结合和研发抵扣政策实施也有所提升，分别提高 0.03 分和 0.02 分。

（二）东中部地区评价提升较大，西部地区评价负增长

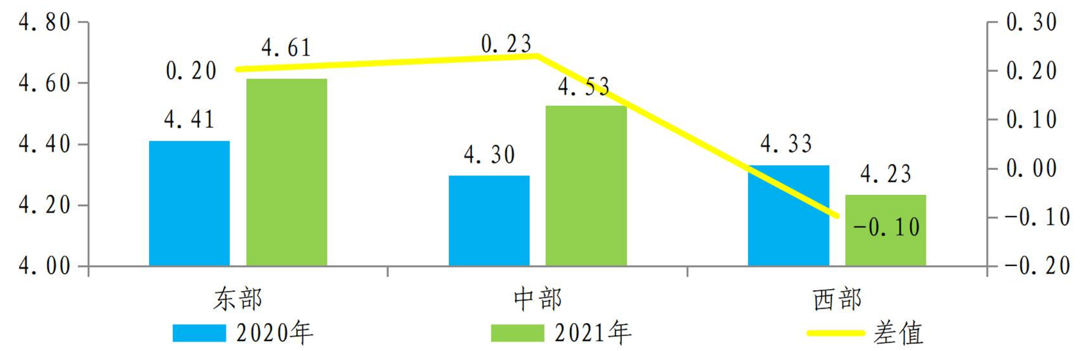


图2-7-2 各地区科技创新环境评价对比

分地区看，东部地区对科技创新环境评价最高，为 4.61 分，较上年提高 0.20 分；中部地区评价较上年提高最多，评分为 4.53 分，提高 0.23 分；西部地区评价负增长，较上年下降 0.10 分，仅 4.23 分。

（三）中外合资、合作企业评价最高，其他所有制企业评价低

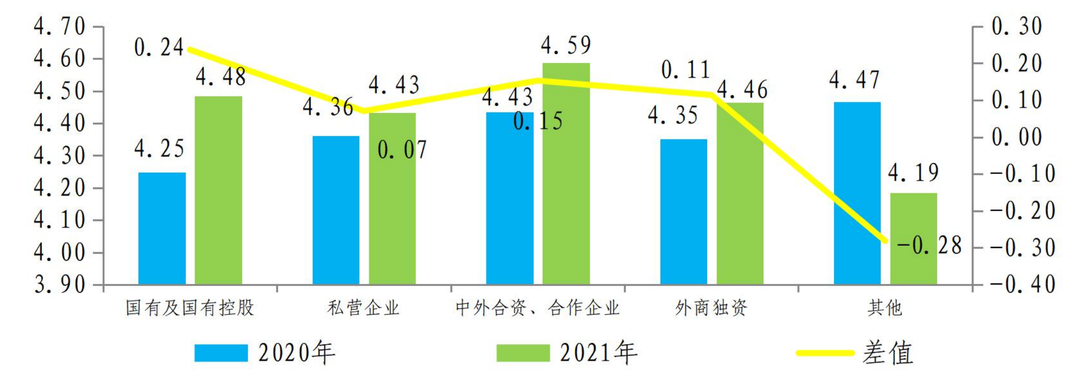


图2-7-3 不同所有制企业科技创新环境年度评价对比图

从所有制角度看，中外合资、合作企业（4.59 分）评价最高，较上年提高 0.15 分；国有企业（4.48 分）和外商独资企业（4.46 分）评价较高，较上年分别提高 0.24 分和 0.11 分；其他所有制企业（4.19 分）评分最低，较上年降低 0.28 分；私营企业评价居中，为 4.43 分，较上年提高 0.07 分。

（四）传统制造业评价较高，三行业评价降低

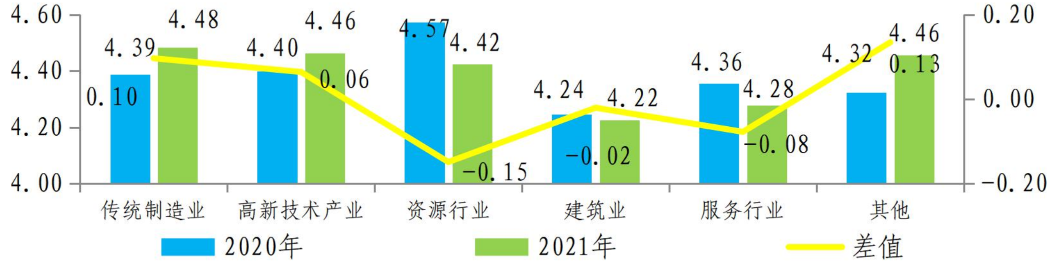


图2-7-4 不同行业科技创新环境年度评价对比图

分行业看，传统制造业对科技创新环境评价最高，为 4.48 分；其次是其他行业、高新技术产业和资源行业，分别为 4.46 分、4.46 分和 4.42 分；建筑业、服务行业评分较低，分别为 4.22 分、4.28 分。

与 2020 年相比，2021 年其他行业、传统制造业和高新技术产业评价提升明显，分别提高 0.13 分、0.10 分和 0.06 分；资源行业、服务行业和建筑业评价出现下降，分别降低 0.15 分、0.08 分和 0.02 分。

八、人力资源：评价排名末位，社会专业化人才可得性评价较低

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、创新创业人才的可得性、社会专业化人才可得性 4 个二级指标，其中社会专业化人才可得性为 2021 年新设指标。2021 年，人力资源环境评价在 12 个一级指标中排名末位，评价仅 4.04 分。

（一）熟练劳动力评价较高，社会专业化人才可得性评价较低

从细分指标看，熟练劳动力可获得性评价相对较高，为 4.11 分；中高层管理员可获得性和创新创业人才资源可得性评价居中，均为 4.04 分；社会专业化人才可得性评价最低，仅 3.97 分。

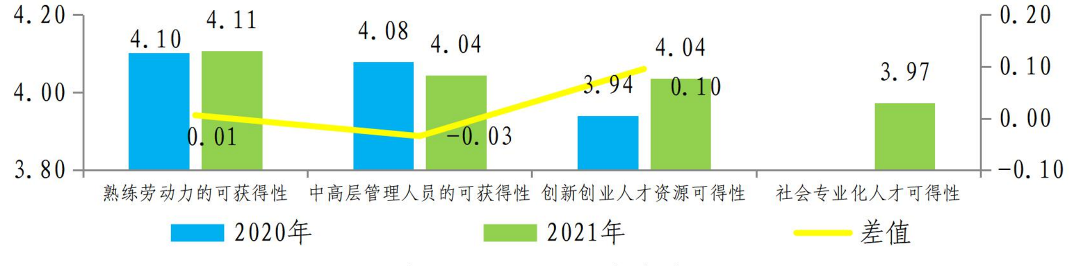


图2-8-1 人力资源环境细分指标年度评价对比图

与 2020 年相比，2021 年创新创业人才的可得性指标（0.10 分）提升最多；熟练劳动力的可获得性指标（0.01 分）有所提升；中高层管理人员的可获得性评价较上年降低 0.03 分。

2021 年，全国人工成本占总成本比重为 26.27%，较上年下降 1.73%，人工成本年均上涨 8%，较上年（7.9%）略有提高。

（二）中部地区评价显著提高，西部地区评价负增长

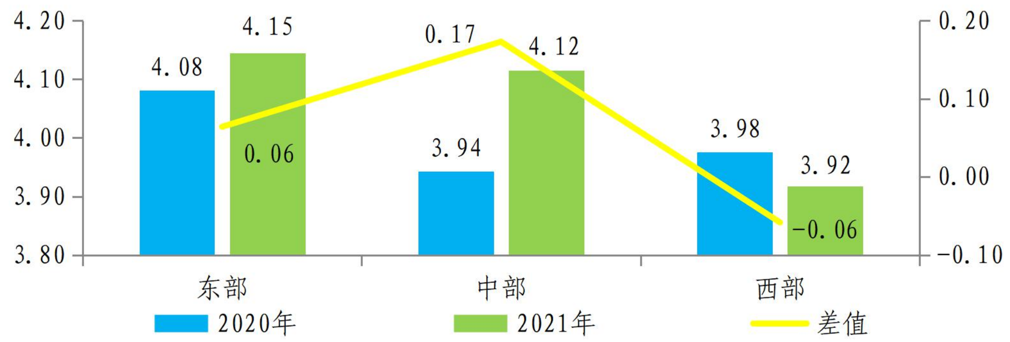


图2-8-2 各地区人力资源环境评价对比

分地区看，东部地区企业对人力资源环境评价最高，为 4.15 分，较上年提高 0.06 分；中部地区较上年提高最多，得分为 4.12 分，提高 0.17 分；西部地区评价负增长，较上年下降 0.06 分，仅 3.92 分。

（三）国有企业评价较高，中外合资、合作企业评价较低

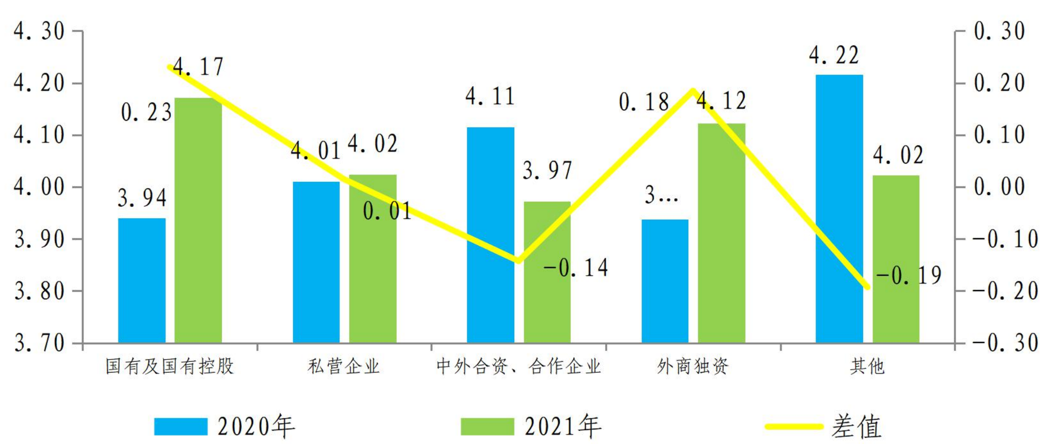


图2-8-3 不同所有制企业人力资源环境年度评价对比图

从所有制角度看，国有企业（4.17 分）对人力资源环境评价最高，较上年提高 0.23 分；其次是外商独资企业（4.12 分），较上年提高 0.18 分；中外合资、合作企业（3.97 分）评价最低，且较上年降低 0.14 分；其他所有制企业和私营企业评价居中，均为 4.02 分，

其他所有制企业较上年降低 0.19 分，私营企业评价较上年略有提升（提高 0.01 分）。

（四）资源行业评价最高，建筑业评价较低

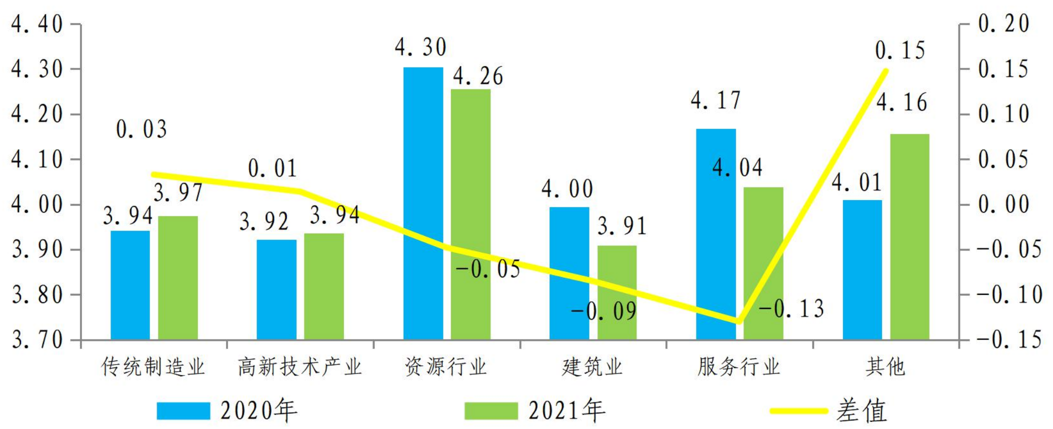


图2-8-4 不同行业人力资源环境年度评价对比图

分行业看，资源行业对人力资源环境评价分值最高，为 4.26 分；其次是其他行业，为 4.16 分；建筑业评分最低，为 3.91 分；服务行业、传统制造业和高新技术产业评分居中，分别为 4.04 分、3.97 分和 3.94 分。

与 2020 年相比，2021 年其他行业评价提升较多，提高 0.15 分；传统制造业和高新技术产业评价有所提升，分别提高 0.03 分和 0.01 分；服务行业、建筑业和资源行业出现下降，分别降低 0.13 分、0.09 分和 0.05 分。

九、金融服务：指标提升空间较大，融资成本年度涨幅降低

金融服务环境细分为融资便利性、融资渠道多元化 2 个二级指标。近几年，金融服务环境有所改善，但总体评价仍不容乐观，且东中西地区之间评价差异较大。2021 年，受访企业对金融服务环境总体评价较低，为 4.17 分，在 12 个一级指标中排名第 11 位。

（一）二级指标评分较低，指标间差异不大

从细分指标看，融资便利性评分为 4.18 分，融资渠道多元化为 4.16 分，两者差值仅为 0.02 分。与 2020 年相比，2021 年两指标均

有较大提升,其中融资便利性提高 0.11 分,融资渠道多元化提高 0.08 分。

2021 年融资成本率（融资成本占总成本百分比）为 13.95%，较上年（13.05%）略有提升。融资成本年均上浮 8%，较上年（9.94%）有所下降。

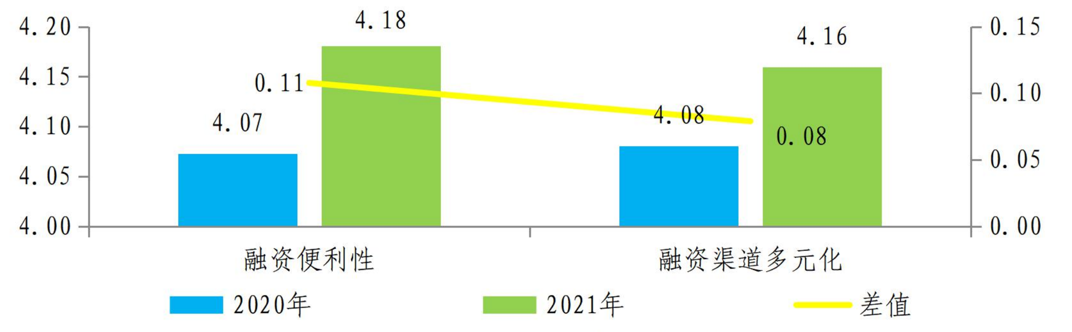


图2-9-1 金融服务环境细分指标年度评价对比图

（二）东中部地区评价显著提高，西部地区评价负增长

分地区看，东部地区对金融服务环境评价最高，为 4.37 分，较上年提高 0.24 分；中部地区较上年提升最多（提高 0.26 分），评价为 4.32 分；西部地区评价负增长，较上年下降 0.06 分，仅 3.92 分。

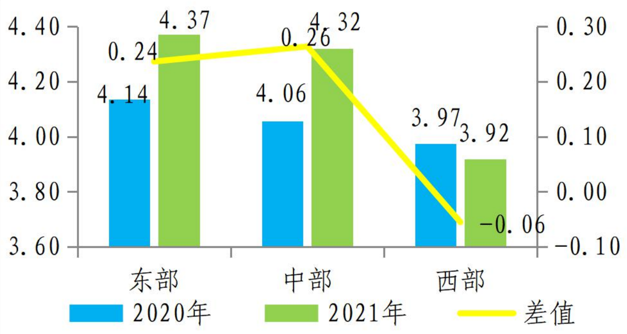


图2-9-2 各地区金融服务环境评价对比

（三）外商独资企业评价较高，其他所有制企业评价较低

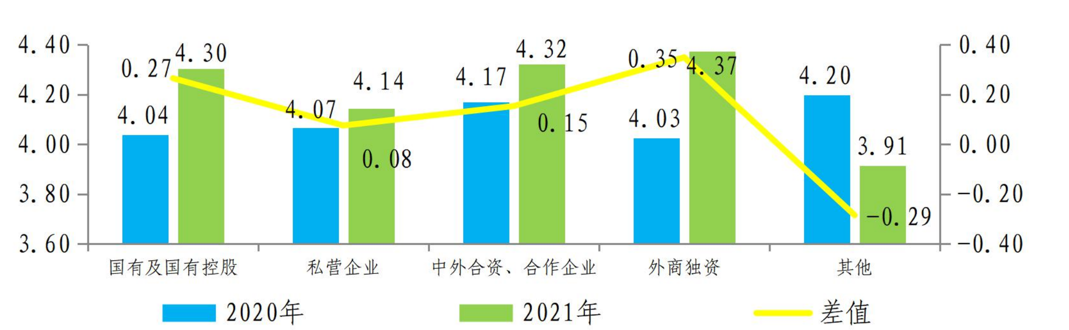


图2-9-3 不同所有制企业金融服务环境年度评价对比图

从所有制角度看，外商独资企业（4.37 分）对金融服务环境评价最高，较上年提高 0.35 分；中外合资、合作企业（4.32 分）和国

有企业（4.30 分）评价较高，较上年分别提高 0.15 分和 0.27 分；其他所有制企业评分最低（3.91 分），较上年降低 0.29 分；私营企业评价居中，为 4.41 分，较上年提高 0.08 分。

（四）高新技术产业评价提升大，资源行业评价高，降幅大

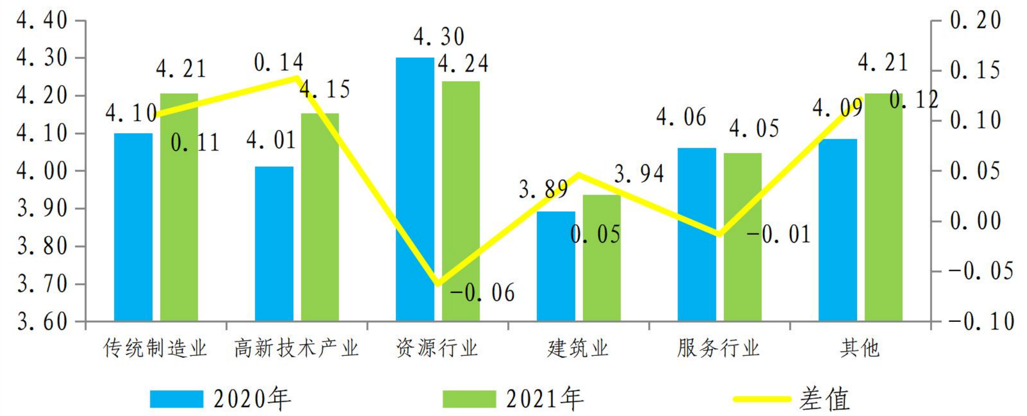


图2-9-4 不同行业金融服务环境年度评价对比图

分行业看，资源行业对金融服务环境评价最高，为 4.24 分；其次是其他行业和传统制造业，均为 4.21 分；建筑业评分最低，为 3.94 分；高新技术产业和服务行业评分居中，分别为 4.15 分和 4.05 分。

与 2020 年相比，2021 年高新技术产业、其他行业和传统制造业评价提升明显，分别提高 0.14 分、0.12 分和 0.11 分；建筑业评价有所提升，提高 0.05 分；服务行业和资源行业评价出现下降，分别降低 0.01 分和 0.06 分。

十、财税服务：总体评价高居榜首，细分指标评价均降低

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。2021 年企业对财税服务环境（4.52 分）总体评分最高，在 12 个一级指标中高居榜首，达到优秀水平。

（一）细分指标评价均为优秀，但均较上年降低

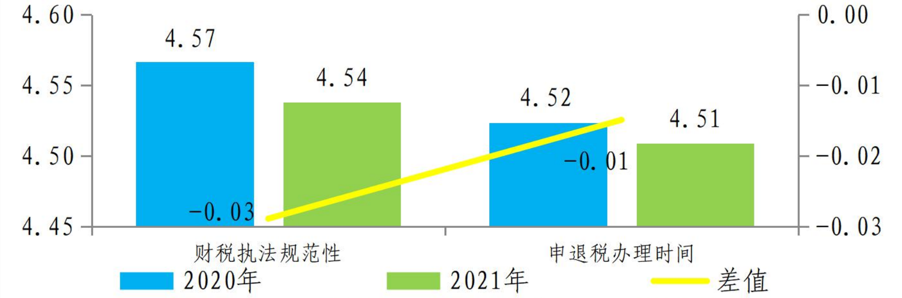


图2-10-1 财税服务环境细分指标年度评价对比图

从细分指标看，财税执法规范性得分为 4.54

分，申退税办理时间得分为 4.51 分。

与 2020 年相比，2021 年两指标评价均有所降低，其中财税执法规范性降低 0.03 分，申退税办理时间降低 0.01 分。

表 2-10-1 财税服务环境指标对比

项目（单位）	2020 年	2021 年
税费缴纳次数（次）	15.83	12.55
税费缴纳耗时（小时）	12.62	7.25
出口退税到账时间（工作日）	11.79	14.18
总费率（缴费占总利润的百分比）	21.96	15.46
总税率（缴税占总利润的百分比）	34.15	24.84

具体来看，企业平均税费缴纳次数从 15.83 次降低至 12.55 次；税费缴纳耗时从 12.62 小时降低至 7.25 小时；出口退税到账时间从 11.79 个工作日提高到 14.18 个工作日；总费率从 21.96%下降到 15.46%；总税率从 34.15%下降到 24.84%。

（二）中部地区评价显著提高，西部地区评价下降明显

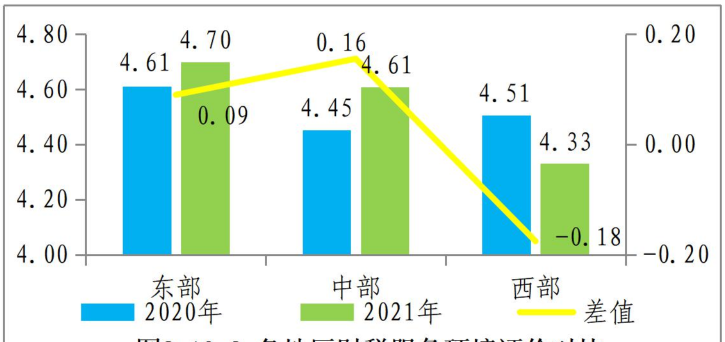


图2-10-2 各地区财税服务环境评价对比

分地区看，东部地区企业对财税服务环境评价最高，为 4.70 分，较上年提高 0.09 分；中部地区较上年提升最多（提高 0.16 分），评价为 4.61 分；西部地区评价负增长，较上年下降 0.18 分，仅 4.33 分。

（三）外商独资企业评价提升多，私营和其他所有制企业评价负增长

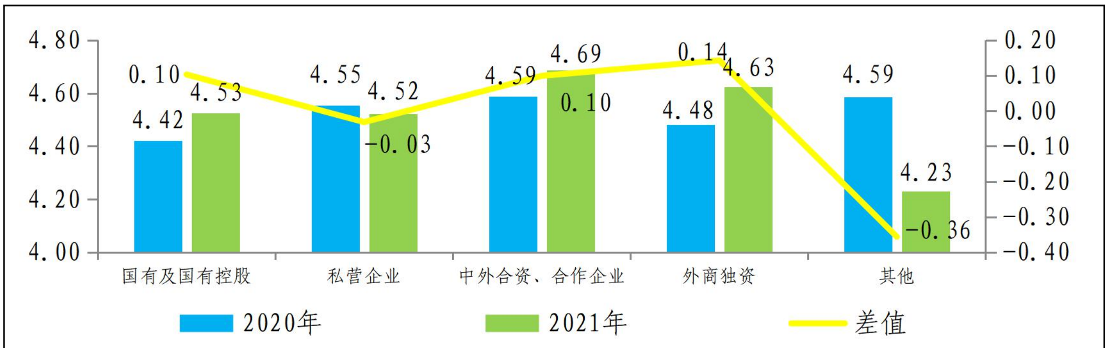


图2-10-3 不同所有制财税服务环境企业年度评价对比图

从所有制角度看，中外合资、合作企业（4.69 分）对财税服务环境评价最高，较上年提高 0.10 分；外商独资企业（4.63 分）和国有企业（4.53 分）评价较高，较上年分别提高 0.14 分和 0.10 分；其他所有制企业评分最低（4.23 分），较上年降低 0.36 分；私营企业评价居中，为 4.52 分，较上年降低 0.03 分。

（四）传统制造业评价较高，建筑业评价较低

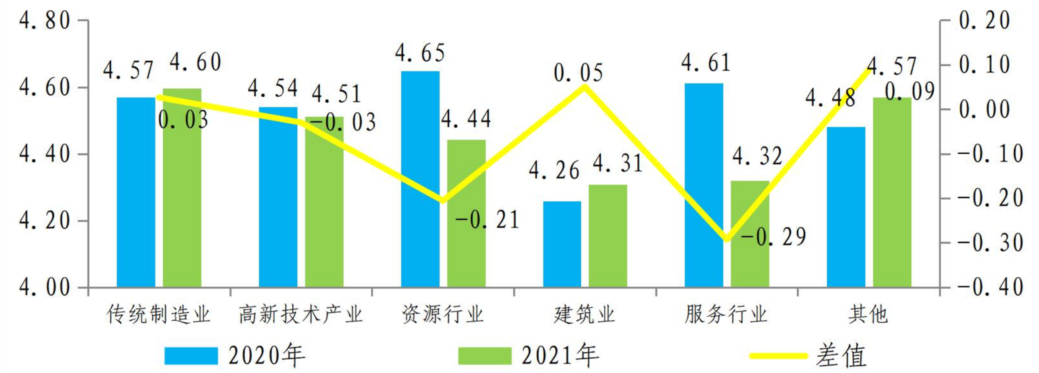


图2-10-4 不同行业财税服务环境年度评价对比图

分行业看，传统制造业对财税服务环境评价最高，为 4.60 分；其次是其他行业和高新技术产业，分别为 4.57 分和 4.51 分；建筑业和服务行业评分较低，分别为 4.31 分和 4.32 分；资源行业评分居中，为 4.44 分。

与 2020 年相比，2021 年其他行业和建筑业对财税服务环境评价提升明显，分别提高 0.09 分和 0.05 分；其次是传统制造业，提高 0.03 分；服务行业、资源行业和高新技术产业评价出现下降，分别降低 0.29 分、0.21 分和 0.03 分。

十一、海关服务：评价并列第二，服务行业评价负增长

海关服务环境细分为货物通关、检验检疫和人员出入境 3 个二级指标。2021 年，受访企业对海关服务环境评价较高（4.51 分），在 12 个一级指标中并列第二。

（一）二级指标均达到优秀水平，且评价持续上升

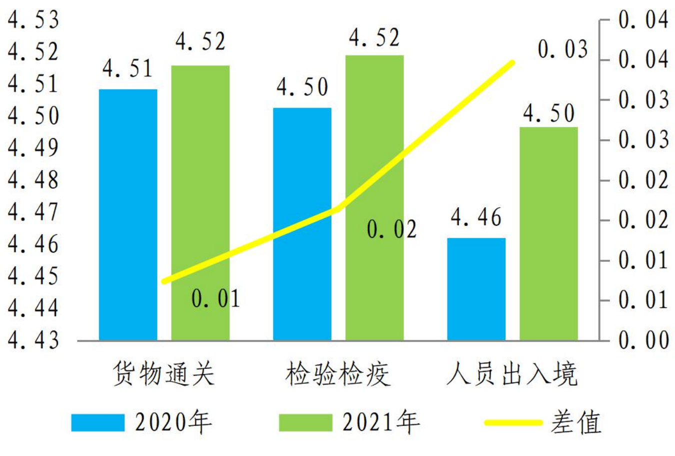


图2-11-1 海关服务环境细分指标年度评价对比图

从细分指标看，货物通关和检验检疫评价较高，均为4.52分；人员出入境评价略低，为4.50分。与2020年相比，2021年各细分评价均有所提升，其中人员出入境评价提升0.03分；检验检疫和货物通关评价分别提升0.02分和0.01分。

（二）东部地区评价最高，中部地区评价显著提高

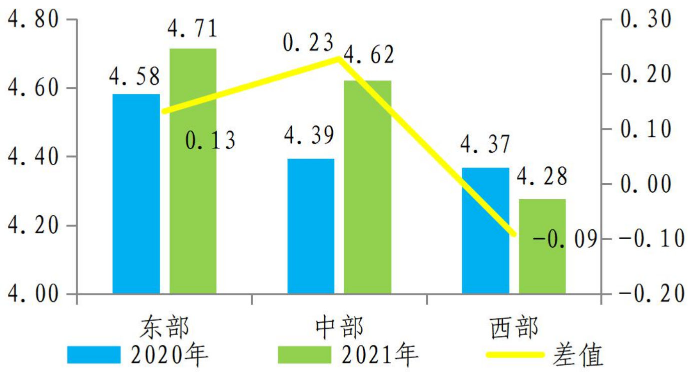


图2-11-2 各地区海关服务环境评价对比

分地区看，东部地区企业对海关服务环境评价最高，为4.71分，较上年提高0.13分；中部地区较上年提升最多（提高0.23分），评价为4.62分；西部地区评价负增长，较上年下降0.09分，仅4.28分。

（三）外商独资和国有企业评价提升快，其他所有制评价负增长

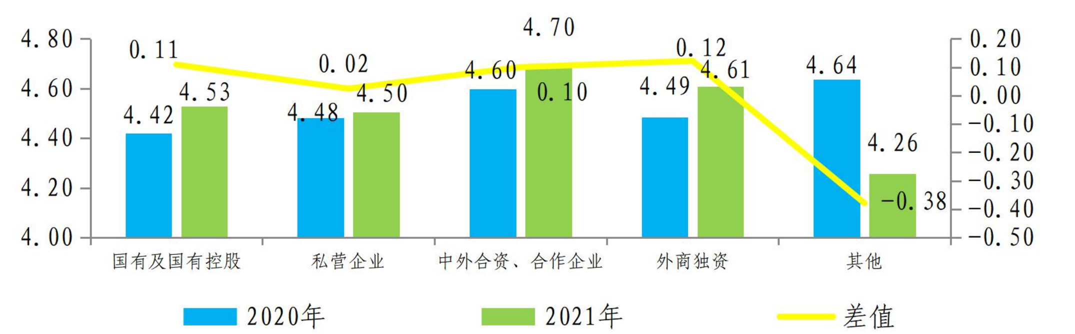


图2-11-3 不同所有制企业海关服务环境年度评价对比图

从所有制角度看，中外合资、合作企业（4.70 分）对海关服务环境评价最高，较上年提高 0.10 分；外商独资企业（4.61 分）和国有企业（4.53 分）评价较高，较上年分别提高 0.12 分和 0.11 分；其他所有制企业评分最低（4.26 分），较上年降低 0.38 分；私营企业评价居中，为 4.50 分，较上年提高 0.02 分。

（四）传统制造业评价高，服务行业和资源行业评价负增长

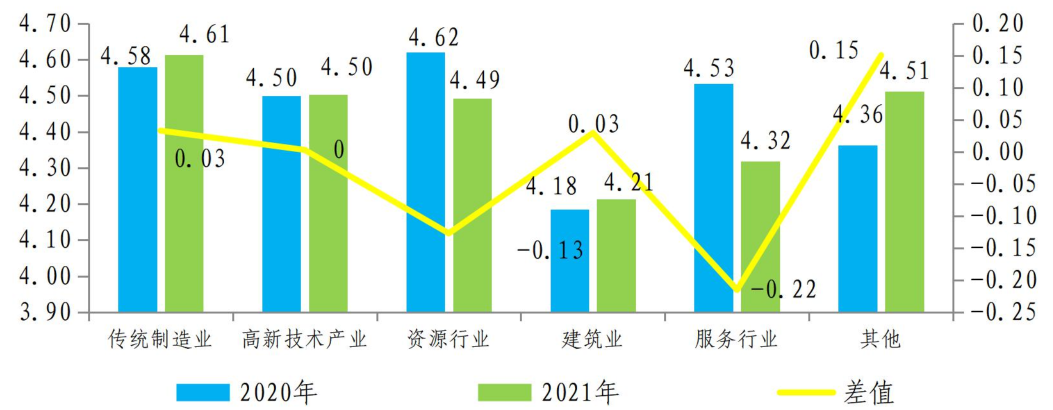


图2-11-4 不同行业海关服务环境年度评价对比图

分行业看，传统制造业对海关服务环境评价最高，为 4.61 分；其次是其他行业和高新技术产业，分别为 4.51 分和 4.50 分；建筑业评分最低，为 4.21 分；资源行业和服务行业评分居中，分别为 4.49 分和 4.32 分。

与 2020 年相比，2021 年其他行业评价提升明显，提高 0.15 分；其次是，建筑业和传统制造业评价均提高 0.03 分；高新技术产业评价持平；服务行业和资源行业评价下降，分别降低 0.22 分和 0.13 分。

十二、企业设立和退出：环保手续评价较高，建筑业评价显著提升

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 3 个二级指标。2021 年受访企业对企业设立与退出环境评价为 4.36 分，在 12 个指标中排名第八。

（一）环保手续评价较高，土地获取评价较低

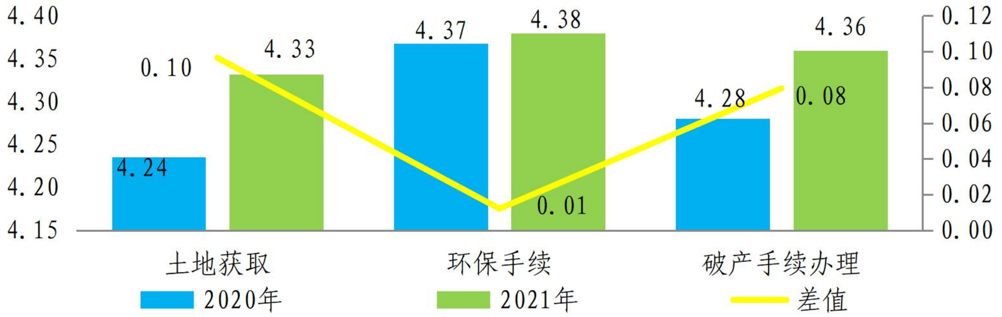


图2-12-1 企业设立和退出细分指标年度评价对比图

从细分指标看，环保手续评价最高，为 4.38 分；土地获取评价最低，为 4.33 分；破产手续办理评价居中，为 4.38 分。

与 2020 年相比，2021 年各细分评价均有所提升，其中土地获取评价（0.10 分）提升最多，其次是破产手续办理（0.08 分）评价，环保手续略有提升（提高 0.01 分）。

表 2-12-1 企业设立与退出环境指标

项目		均值 2020 年	均值 2021 年	趋势
开办企业	程序（项）	4.33	26.37	↑
	时间（工作日）	6.97	16.88	↑
	费率（占人均收入%）	12.21	12.96	↑
施工许可	办理流程（项）	4.61	4.75	↑
	办理时限（工作日）	7.59	12.70	↑
	办理费率（%）	6.86	9.98	↑
获得电力	办理环节（个）	3.71	2.62	↓
	申请材料（项）	3.76	2.89	↓
	办理时限（工作日）	6.77	8.10	↑
用水用气报装	办理环节（个）	3.27	2.43	↓
	申请材料（项）	3.58	2.81	↓
	办理时限（工作日）	5.39	7.09	↑
产权登记	程序（项）	4.06	3.70	↓
	时限（工作日）	6.42	10.93	↑
	费率（占财产价值%）	14.65	7.15	↓
获得信贷	办理环节（个）	4.93	3.60	↓
	申请材料（项）	5.27	4.77	↓
	办理时限（工作日）	9.25	12.16	↑
企业注销	材料（项）	4.23	4.37	↓
	费用（元）	340.38	1740576	↑
	程序（个）	4.18	3.38	↓
	时限（工作日）	9.77	14.57	↑
破产诉讼费用率（%）		4.55	5.67	↑
清算回收率（%）		11.09	14.49	↑

2021年问卷调查显示，开办企业程序、时间和费率均值分别为26.37项、16.88个工作日和12.96%；施工许可办理流程、办理时限和办理费率分别为4.75项、12.70工作日和9.98%；产权登记程序、时限和费率分别为3.70项、10.93工作日和7.15%；获得信贷办理环节、申请材料和办理时限分别为3.60个、4.77项和12.16工作日；获得电力办理环节、申请材料和办理时限分别为2.62个、2.89项和8.10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2.43个、2.81项和7.09工作日；企业注销材料、费用、程序和时限分别为4.37项、1740576元、3.38个和14.57工作日；在破产清算方面，诉讼费用率均值为5.67%，清算回收率为14.49%。

（二）东部地区评价最高，中部地区提升最多

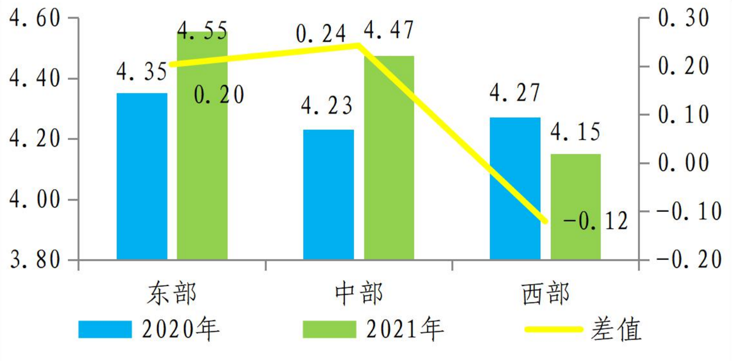


图2-12-2 各地区企业设立和退出环境评价对比

分地区看，东部地区企业对企业设立和退出环境评价最高，为4.55分，较上年提高0.20分；中部地区较上年提高最多，得分为4.47分，提高0.24分；西部地区评价负增长，较上年下降0.12分，仅4.15分。

（三）中外合资、合作企业评价提升多，其他所有制评价较低

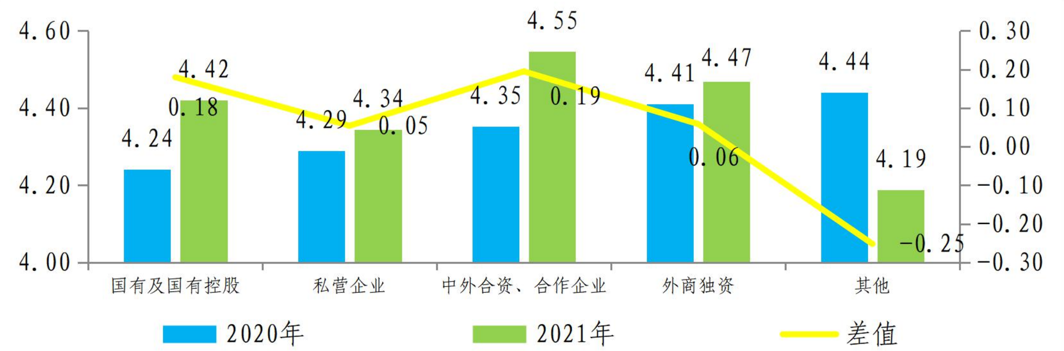


图2-12-3 不同所有制企业企业设立和退出年度评价对比图

从所有制角度看，中外合资、合作企业（4.55分）对企业设立和退出环境评价最高，其次是外商独资企业（4.47分）；其他所有制

企业（4.19 分）评分最低；国有企业和私营企业评价居中，分别为 4.42 分和 4.34 分。

与 2020 年相比，2021 年中外合资、合作企业评价提升最多（提高 0.19 分），其次是国有及国有控股企业（提高 0.18 分），外商独资企业和私营企业提升幅度居中，分别提高 0.06 分和 0.05 分。其他所有制评价负增长，降低 0.25 分。

（四）传统制造业评价较高，建筑业评价较低

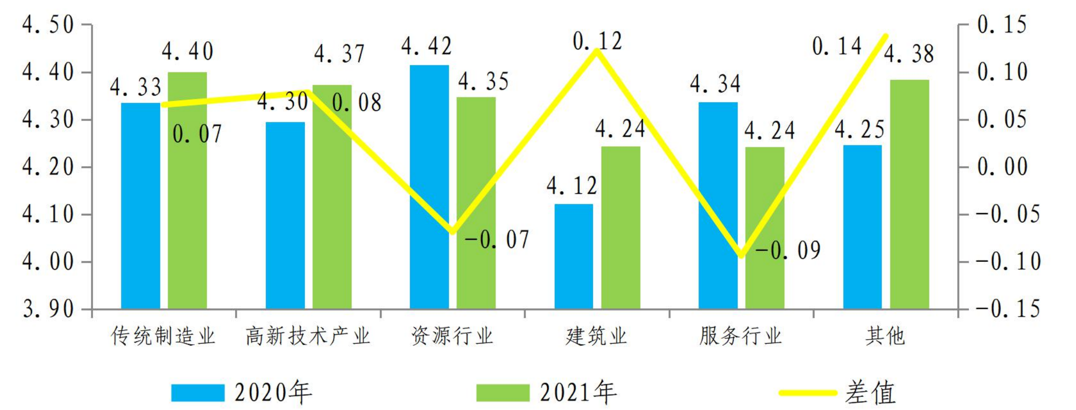


图2-12-4 不同行业企业设立和退出年度评价对比图

分行业看，传统制造业对企业设立和退出环境评价最高，为 4.40 分；其次是其他行业和高新技术产业，分别为 4.38 分和 4.37 分；建筑业和服务行业评分较低，均为 4.24 分；资源行业评分居中，为 4.35 分。

与 2020 年相比，2021 年其他行业和建筑业对企业设立和退出评价提升明显，分别提高 0.14 分和 0.12 分；其次是高新技术产业和传统制造业评价，分别提高 0.08 分和 0.07 分；服务行业和资源行业评价出现下降，分别降低 0.09 分和 0.07 分。

第三章　企业经营与投资状况

2021 年，受访企业持续受到新冠肺炎疫情冲击，有七成企业收益实现增长，但受到成本提高和市场竞争激烈等问题影响，近五年来收益在小范围波动的企业占比最大。

一、超七成企业受疫情不同程度影响

（一）七成受访企业受疫情消极影响

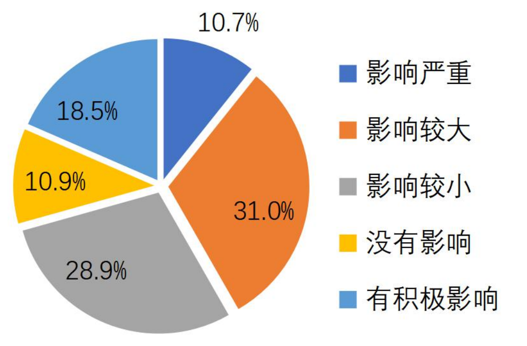


图3-1-1　新冠肺炎疫情影响评价

七成企业受到新冠肺炎疫情不同程度的消极影响，其中受“影响较大”[②]的企业占比最高，为 31%；受“影响较小”和“影响严重”的企业分别占 28.9%和 10.7%。此外，18.5%的企业反映疫情具有积极影响；10.9%的企业反映未受到影响。

从不同地区看，东部、中部和西部地区受疫情影响的企业占比均超六成，东部地区受影响企业占比最高，为 74.1%。从受影响程度上看，西部地区受“严重影响”和“较大影响”的企业占比最高，为 48.6%；中部地区受“积极影响”和“没有影响”的企业占比最高，为 35.8%。

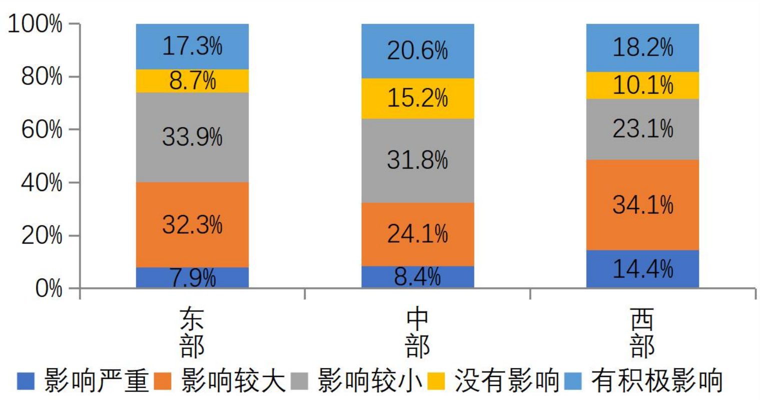


图3-1-2 各地区受新冠肺炎疫情影响评价图

[②] 注：“影响严重”指 2021 年上半年销售收入下降 50%以上，“影响较大”指下降 20%-50%，“影响较小”指下降 0-20%，“有积极影响”指收入不降反升。

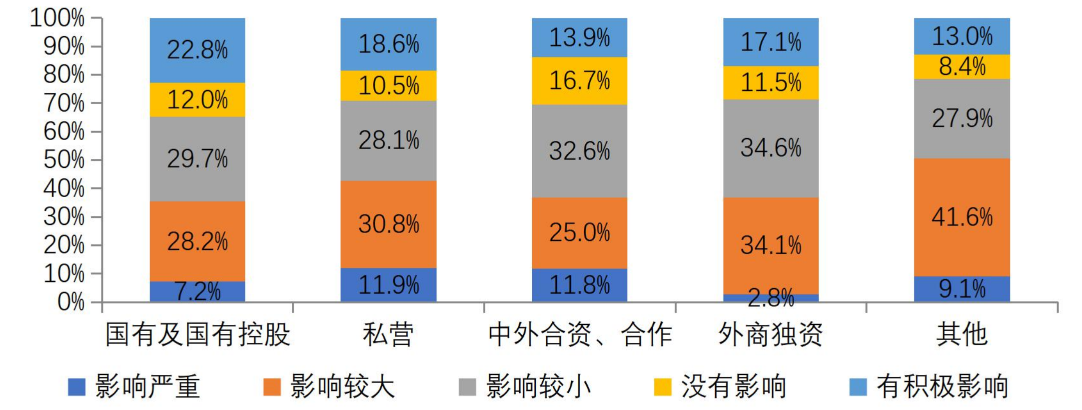


图3-1-3 不同所有制企业受新冠肺炎疫情影响评价图

从不同所有制类型看，国有企业“未受影响”或受“积极影响”占比较高。其他所有制企业受疫情消极影响占比最大，为 78.6%；国有企业和中外合资、合作企业受疫情影响相对较小，“未受影响”或“受积极影响”的企业占比超三成，分别为 34.8%和 30.6%。

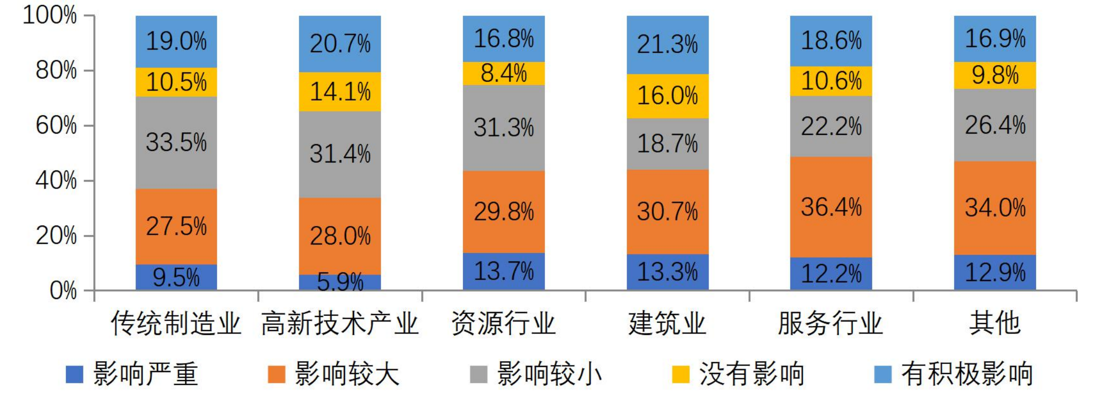


图3-1-4 不同行业受新冠肺炎疫情影响评价图

从不同行业看，建筑业“未受影响”或受“积极影响”占比较大。资源行业和其他行业受疫情消极影响的企业占比较多，分别为 74.8%和 73.3%；服务行业和其他行业受“影响严重”和“影响较大”的企业占比较多，分别为 48.5%和 47%；资源行业受“影响严重”的企业占比最高，为 13.7%；建筑业受“积极影响”的企业占比最高（21.3%），其次是高新技术产业（20.7%）。

（二）受访企业出口、生产经营、供应链和资金链受影响明显

54.75%的企业反映疫情对出口的影响最大；43.96%和 38.17%企业表示生产经营和供应链受影响明显；30.37%、25.38%和 21.07%的

企业表示资金链、复工和国内销售受影响明显；仅 6.31%的企业反馈售后服务受到影响。

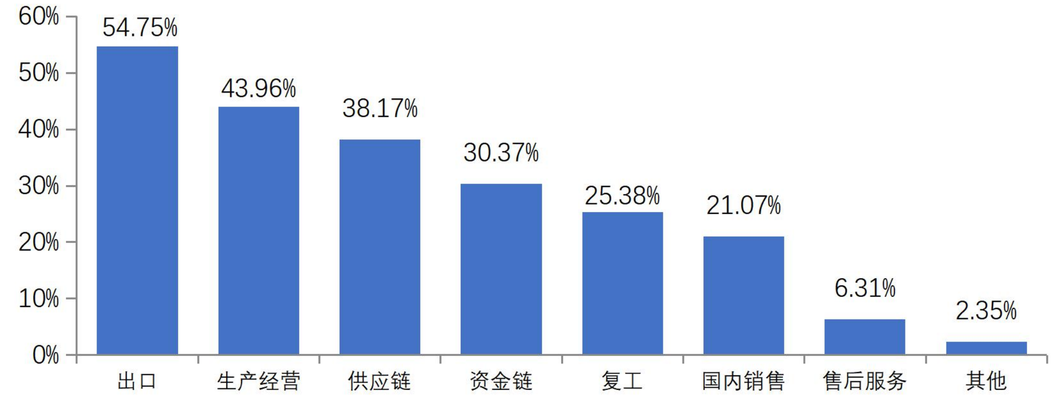


图3-1-5 新冠肺炎疫情对企业生产经营的影响

从行业角度看，资源行业（59.8%）、建筑业（53.3%）和服务业（49.3%）表示疫情对生产经营的影响最大；传统制造业（64.8%）、高新技术产业（62.8%）和其他行业（58.2%）表示疫情对出口影响最大。各行业均有超三成企业反馈供应链受到疫情影响，其中高新技术产业占比最高（48.9%）。

表 3-2-1 不同行业受疫情影响的主要表现

传统制造业	高新技术产业	资源行业	建筑业	服务行业	其他
出口 64.8%	出口 62.8%	生产经营 59.8%	生产经营 53.3%	生产经营 49.3%	出口 58.2%
生产经营 43.2%	供应链 48.9%	供应链 33.3%	资金链 49.3%	资金链 34.3%	生产经营 42.4%
供应链 38.9%	生产经营 36.8%	复工 32.6%	复工 37.3%	供应链 32.4%	供应链 36.4%
资金链 27.1%	资金链 25.6%	国内销售 31.8%	供应链 36.0%	出口 28.8%	资金链 33.3%
复工 24.2%	国内销售 23.3%	资金链 28.8%	出口 34.7%	复工 27.3%	复工 25.2%
国内销售 18.9%	复工 22.4%	出口 18.2%	国内销售 22.7%	国内销售 25.9%	国内销售 18.9%
售后服务 5.8%	售后服务 5.9%	其他 5.3%	售后服务 2.7%	售后服务 9.9%	售后服务 5.8%
其他 1.4%	其他 1.1%	售后服务 4.5%	其他 0.0%	其他 2.5%	其他 3.7%

（三）受访企业对后疫情时期发展前景多持乐观或一般态度

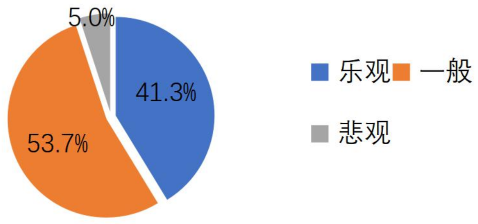


图3-1-6 企业对后疫情时期发展前景的预测

调查显示，企业对后疫情时期发展前景总体较为乐观，超五成（53.7%）企业对后疫情时期发展前景持“一般”态度，41.3%持“乐观”态度，仅5%持“悲观”态度。

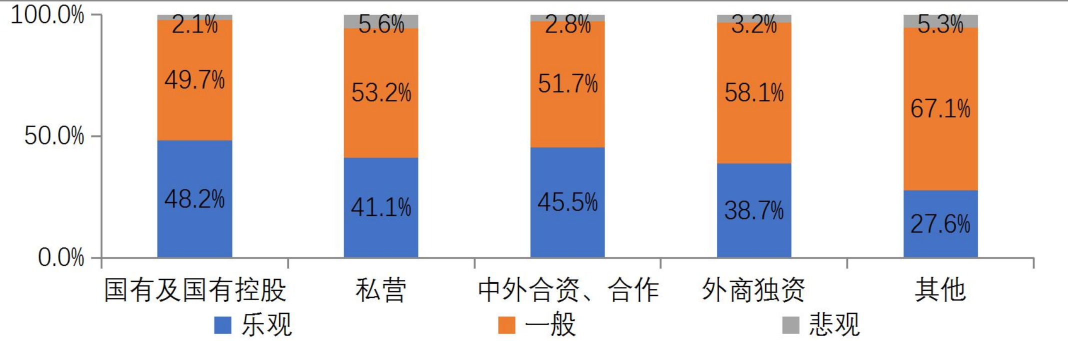


图3-1-7 不同所有制企业对于企业后疫情时期发展前景的预测

从所有制角度看，各类企业对后疫情时期发展前景持“一般”态度的占比接近，其中其他所有制企业占比最高（67.1%）；国有企业和中外合资、合作企业持“乐观”态度的占比较大，分别为48.2%和45.5%，同时持“悲观”态度的占比较少，分别为2.1%和2.8%。

从不同行业看，各行业企业对后疫情时期发展前景持“乐观”态度的差异明显，其中高新技术产业企业占比最高（51.6%）；各行业企业持“一般”态度的占比接近或超半数，其中其他所有制企业占比最高（58.2%）；各行业企业持“悲观”态度的占比均不足一成。

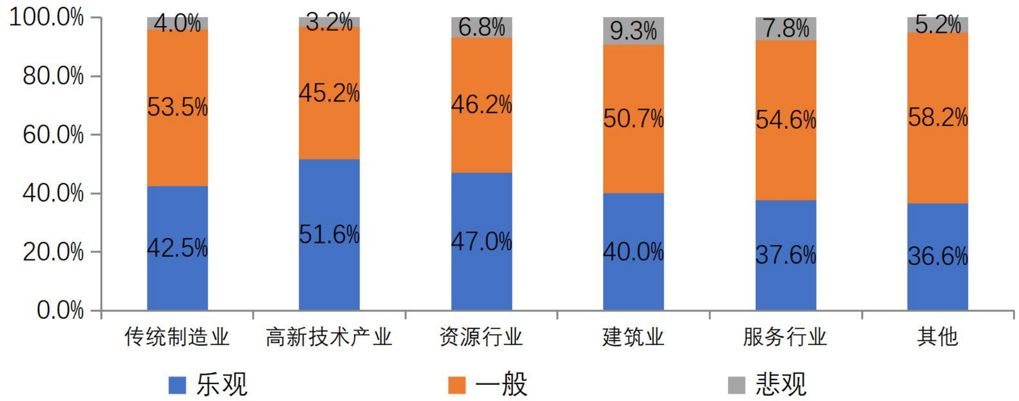


图3-1-8 不同行业对于企业后疫情时期发展前景的预测

（四）近七成受访企业希望政府加大税收减免力度

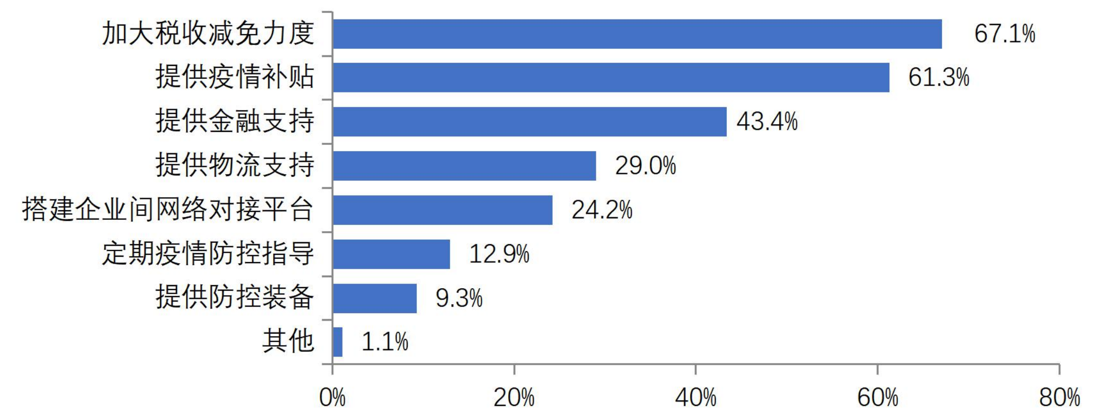


图3-1-9 企业希望政府给予的抗疫支持和帮助

为尽可能减少疫情影响，超六成企业希望政府能加大税收减免力度（67.1%）和提供疫情补贴（61.3%）；43.4%的企业希望政府提供金融支持；超两成企业希望政府在提供物流支持（29%）和搭建企业间网络对接平台（24.2%）方面给予帮助；约一成企业希望政府能提供定期疫情防疫指导（12.9%）和防控装备（9.3%）。

（五）过半数受访企业已采取或可能采取缩减生产规模的措施

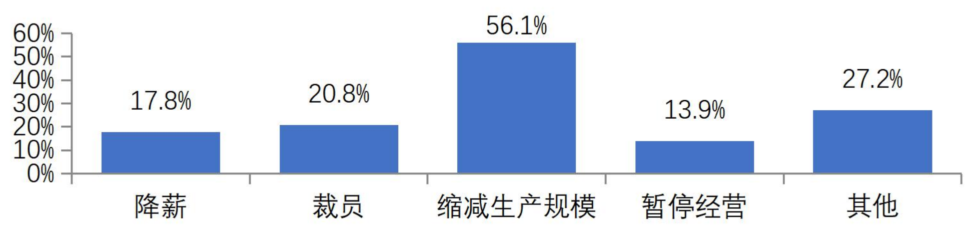


图3-1-10 企业已采取或有可能采取的疫情应对措施

受疫情影响，过半数企业已采取或可能采取缩减生产规模的措施，占 56.1%; 采取裁员、降薪和暂停经营措施的企业分别占 20.8%、17.8%和 13.9%。另有 27.2%的企业已经或即将采取其他措施应对新冠肺炎疫情。

二、超七成受访企业实现收益增长

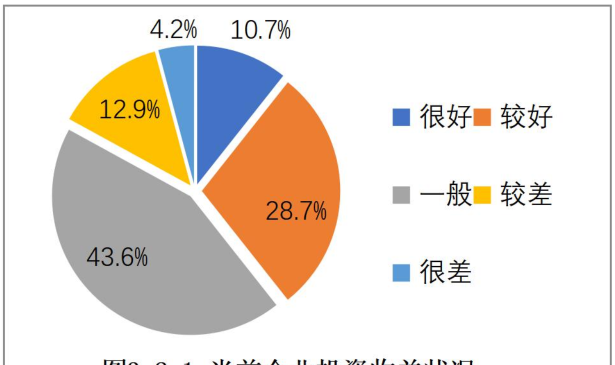


图3-2-1 当前企业投资收益状况

2021 年，随着经济逐渐复苏，企业收益情况也有所好转，近 83%的企业收益在“一般”及以上水平（2020 年该比例为 76.9%），近四成企业收益状况维持在“较好”及以上（39.3%）。

（一）近五成东部企业收益在较好及以上。

分地区看，东部（48.6%）和中部（42.3%）收益“很好”和“较好”企业均超过全国水平（39.3%）；西部收益“较好”及以上企业占比最低，仅 29.8%；东部、中部和西部收益在“一般”及以上水平企业占比均在 75%以上，分别为 90.7%、85.2%和 75.2%

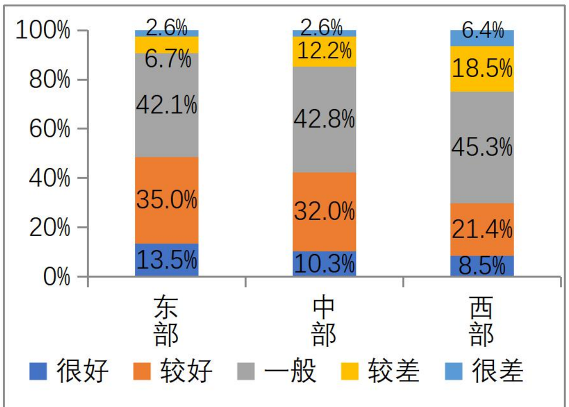


图3-2-2 分地区企业投资收益图

（二）高新技术产业投资收益在较好及以上企业占比超五成

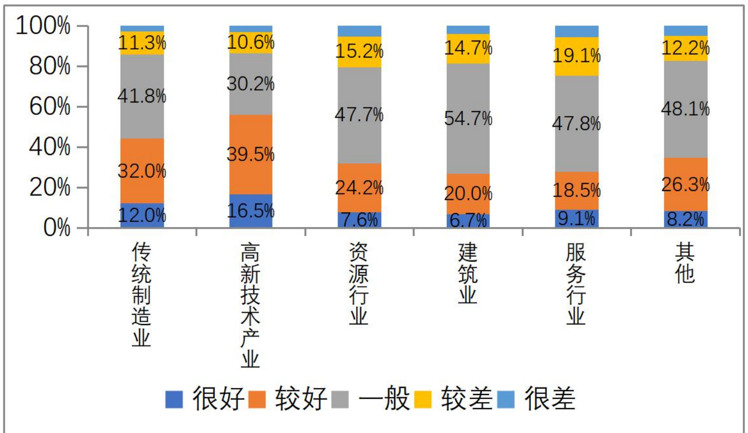


图3-2-3 分行业企业投资收益

分行业看，高新技术**产业**投资收益“较好”及以上企业占比高达 56%，传统制造业次之（44%），建筑业占比最低（26.7%）。**高新技术产业**收益“很好”**和**“较好”**企业**占比均为最高（分别是 16.5%、39.5%），且收益增长企业（“一般”及以上）占比最多，为 86.2%。超五成建筑业投资收益“一般”(54.7%)，占比最高。服务行业收益“较差”和“很差”占比最高，为 24.7%。

（三）收益增长企业占比较上年明显增加

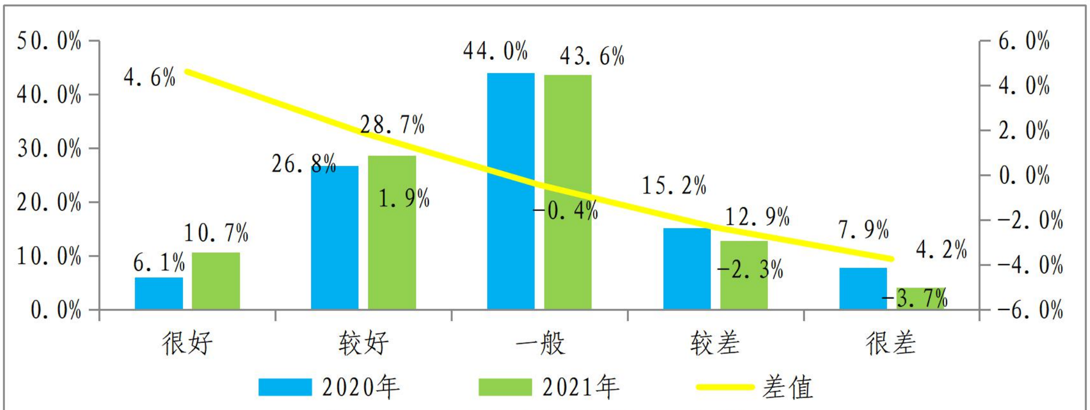


图3-2-4 企业投资收益状况年度对比图

收益增长（收益“一般”及以上）企业占比由 2020 年的 76.9%增加至 2021 年的 83%，投资收益“一般”企业占比与上年基本持平；收益“较好”及以上企业由 2020 年的 32.8%增至 2021 年的 39.3%，其中，收益“很好”企业占比由 2020 年的 6.1%增加至 2021 年的 10.7%；收益“较好”企业占比增加幅度，为 1.9%。收益“较差”及以下企业占比有所下降（下降 6.1%）。

从不同地区看，东部收益“很好”的企业占比增速最高，为 13.5%，增加 7.2%；各地区收益“较好”的企业占比均增加，中部增速最为明显，增加 8.5%；各地区收益“一般”的企业占比均在四成以上，分别为 42.1%、42.8%和 45.3%。2021 年东部、中部和西部地区收益增长（“一般”及以上）的企业比例均超过2020年，分别增加 10.9%、8.9%和 3.7%。

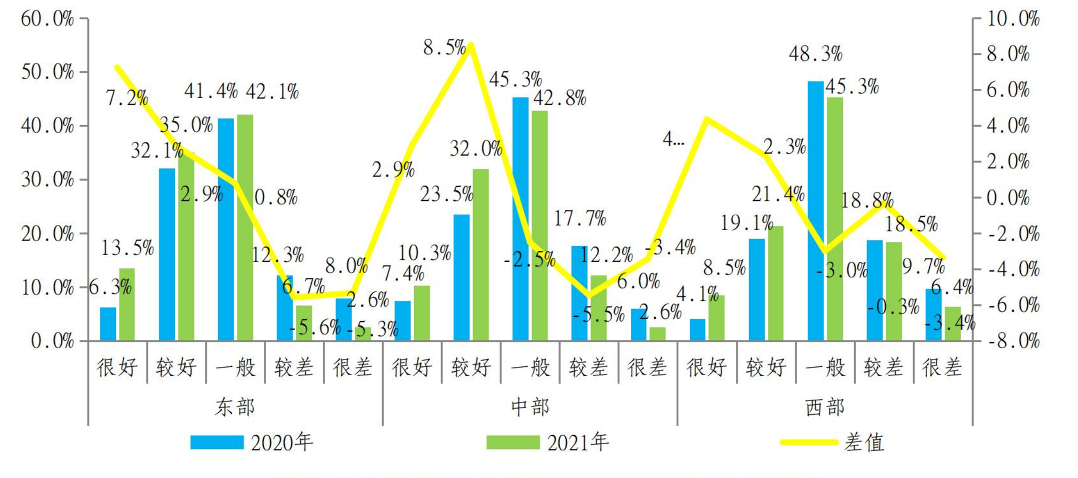


图3-2-5 各地区企业投资收益状况年度对比图

各行业企业收益情况差异较大，高新技术产业收益“很好”的企业增幅最大（6.4%），其次是传统制造业（5.5%）和服务行业（4.9%）。建筑业收益“较差”及“很差”企业占比增幅最小为4.2%。其他行业、传统制造业收入增长企业增幅明显，分别增加12.42%和8.73%；而资源行业收益“较差”和“很差”有所增加，增加7.36%。

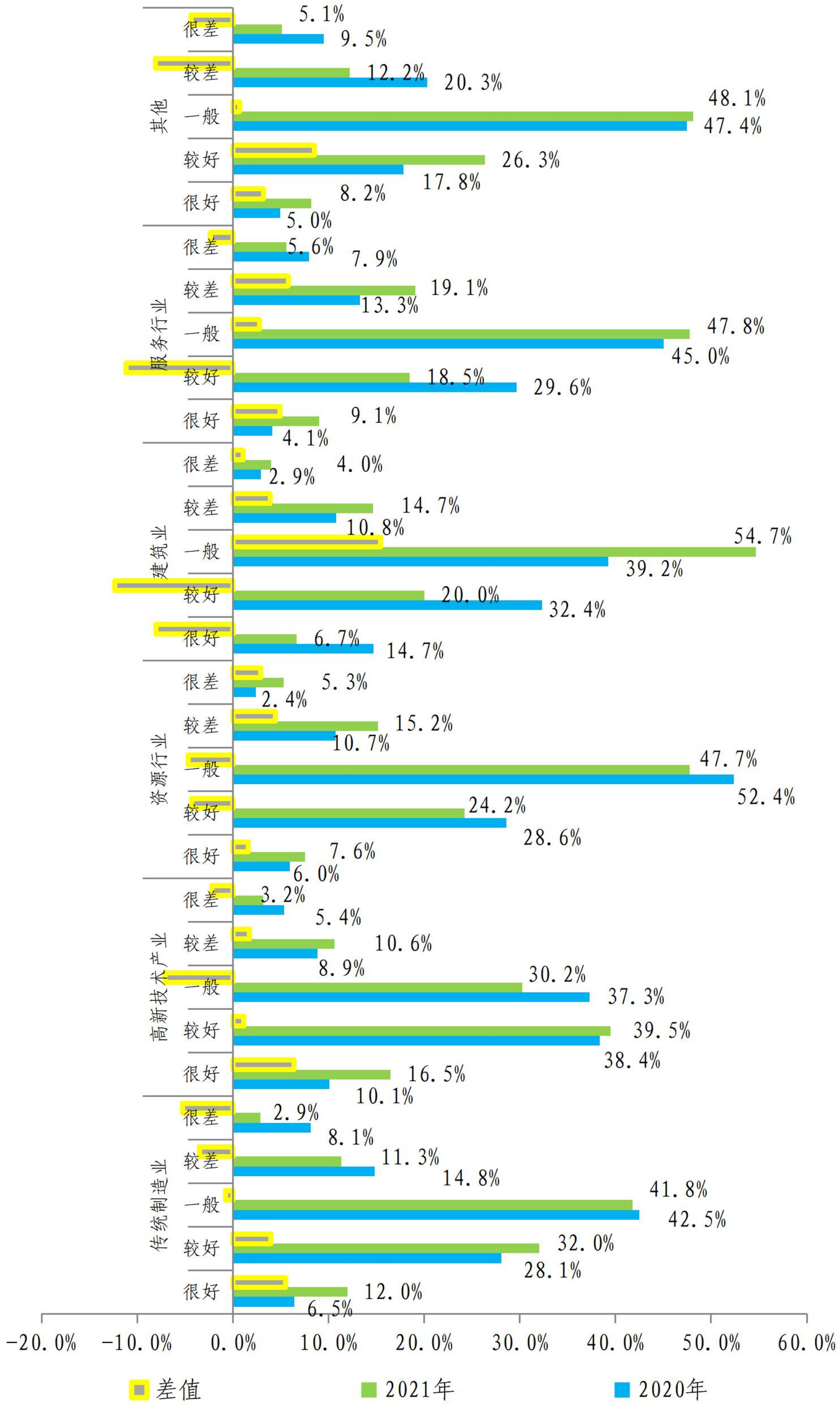


图3-2-6 不同行业企业投资收益状况年度对比图

三、近五年收益持续小范围波动企业占比高

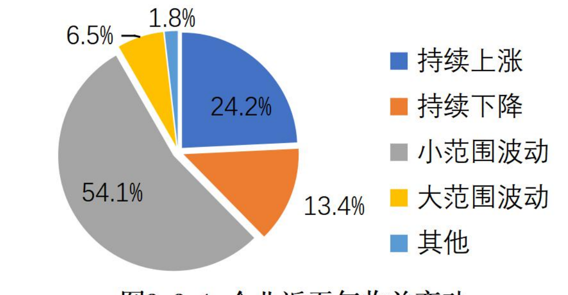


图3-3-1 企业近五年收益变动

24.2%的企业近五年收益保持“持续上涨”（2020 年该比例为 23.3%）；13.4%的企业反映近五年收益“持续下降”（2020 年该比例为 11.7%）。54.1%的企业近五年收益变动为“小范围波动”，6.5%的企业收益变动为“大范围波动”。

（一）各地区超五成受访企业近五年收益小范围波动

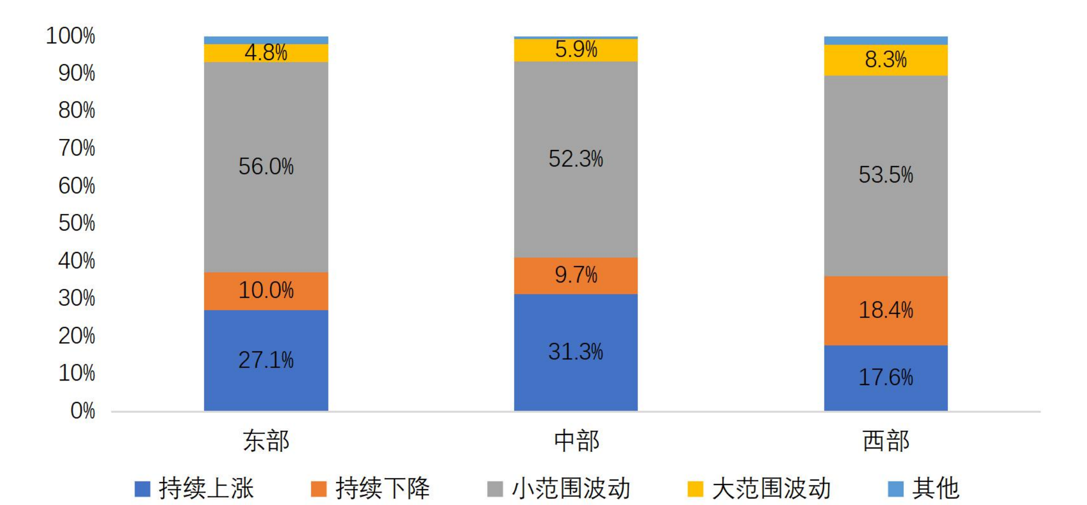


图3-3-2 各地区企业近五年投资收益变动趋势

近五年，各地区企业投资收益变动幅度不大，超五成企业表示收益“小范围波动”。其中，东部最高(56%)、中部最低(52.3%)。中部收益“持续上涨”的企业占比最高，为 31.3%；西部收益“持续下降”的企业占比最高(18.4%)、中部最低(9.73%)；投资收益出现“大范围波动”的情况较少，各地区企业占比均低于 10%。

（二）高新技术行业超四成受访企业近五年收益持续上涨

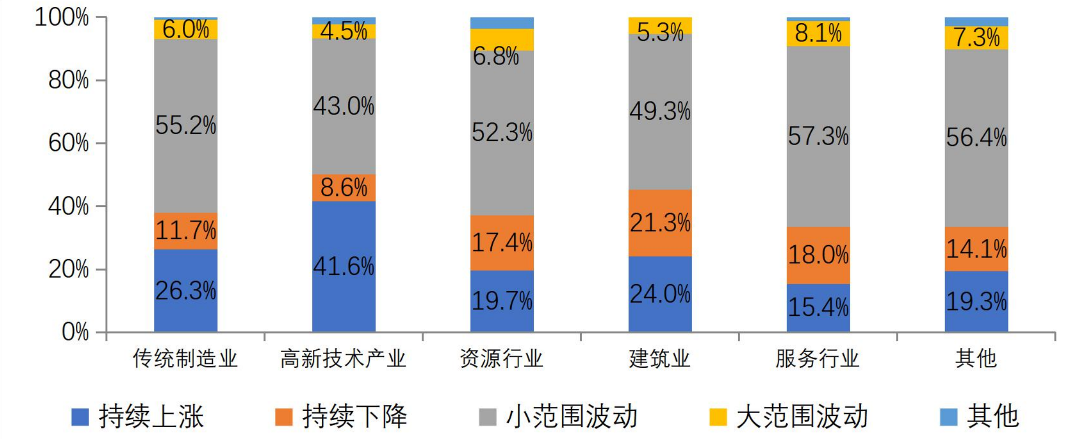


图3-3-3 近五年各行业企业投资收益变动趋势

分行业看，各行业近五年收益“小范围波动”状态占比均最高，其中服务行业有 57.3%的企业收益在“小范围波动”。高新技术行业收益“持续上涨”企业占比最高，为 41.6%；服务行业占比最低，为 15.4%。建筑业收益“持续下降”企业占比最大，为 21.3%；高新技术行业和传统制造业收益“持续下降”企业占比最少，分别为 8.6%和 11.7%。

四、成本提高和市场竞争激烈问题突出

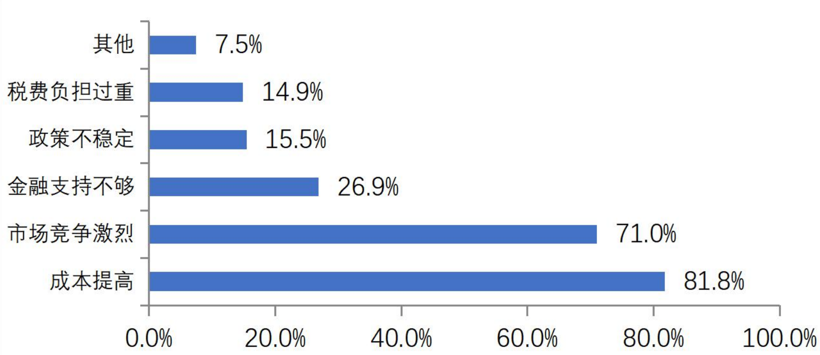


图3-4-1 企业生产经营过程中遇到的问题

企业反映生产经营过程中，市场竞争激烈和成本提高问题最为显著，分别占 81.8%和 71%。此外，金融支持不够(26.9%)、政策不稳定(15.5%)、税费负担过重(14.9%)等问题也较突出。

第二为市场竞争激烈问题，各行业均有超六成企业反映此问题，其中其他行业反映占比最高（74%）。除资源行业外，余下各行业均将金融支持不够问题排在第三，建筑业反映占比最高（26.8%）。

表 3-4-1 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 89.1%	成本提高 83.9%	成本提高 72.5%	成本提高 80.0%	成本提高 68.7%	成本提高 79.9%
市场竞争激烈 73.2%	市场竞争激烈 64.0%	市场竞争激烈 62.6%	市场竞争激烈 69.3%	市场竞争激烈 68.7%	市场竞争激烈 74.0%
金融支持不够 24.5%	金融支持不够 29.2%	政策不稳定 23.7%	金融支持不够 36.0%	金融支持不够 26.8%	金融支持不够 28.7%
税费负担过重 16.6%	税费负担过重 17.2%	金融支持不够 22.9%	政策不稳定 18.7%	政策不稳定 23.7%	税费负担过重 16.2%
政策不稳定 10.8%	政策不稳定 14.3%	税费负担过重 19.8%	税费负担过重 18.7%	税费负担过重 12.5%	政策不稳定 12.0%
其他 5.1%	其他 7.0%	其他 7.6%	其他 6.7%	其他 6.6%	其他 10.9%

五、利用本地资源和开拓市场为企业投资主因

（一）近五成受访企业将利用本地资源视作投资首要原因

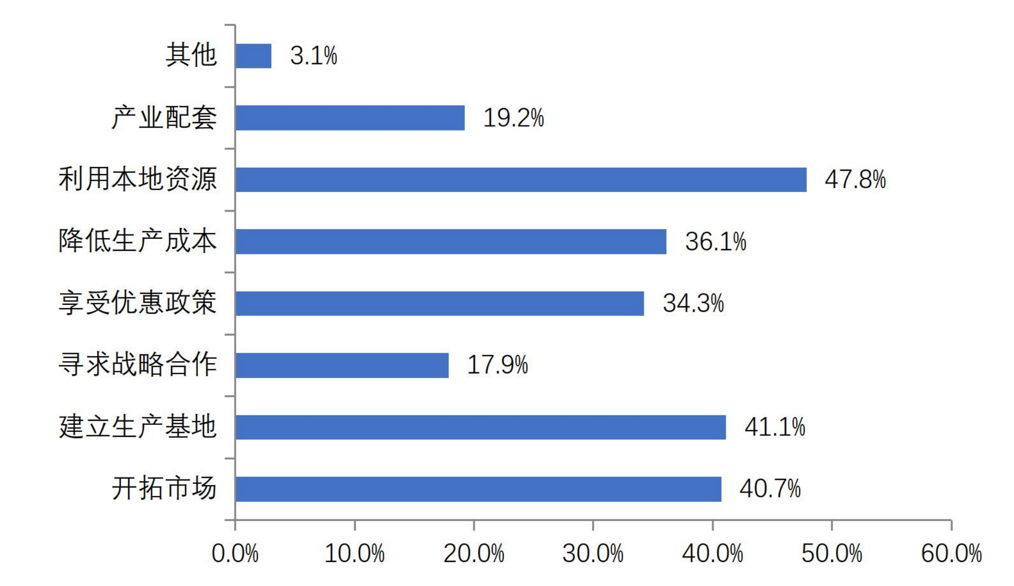
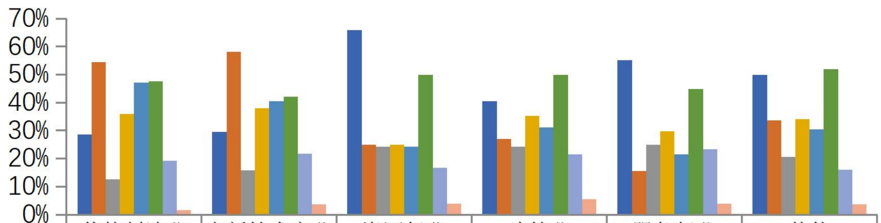


图3-5-1 企业在本地区投资主要因素

47.8%的企业将利用本地资源视作投资首要原因，其次是建立生产基地（41.1%）和开拓市场(40.7%)。降低生产成本和享受优惠政策的占比在三成以上，分别为 36.1%和 34.3%。产业配套和寻求战略合作等因素也是企业投资考虑的问题。

从行业角度看，传统制造业、高新技术产业投资时的首要因素为建立生产基地，分别占 54.4%和 58.2%；资源行业、服务行业投资时的首要因素为开拓市场，分别占 65.9%和 55.3%；建筑业、其他行业投资时的首要因素为利用本地资源，分别占 50%和 51.9%。



	传统制造业	高新技术产业	资源行业	建筑业	服务行业	其他
开拓市场	28.5%	29.5%	65.9%	40.5%	55.3%	49.8%
建立生产基地	54.4%	58.2%	25.0%	27.0%	15.6%	33.5%
寻求战略合作	12.5%	15.9%	24.2%	24.3%	24.9%	20.6%
享受优惠政策	36.0%	38.0%	25.0%	35.1%	29.8%	34.1%
降低生产成本	47.1%	40.5%	24.2%	31.1%	21.6%	30.3%
利用本地资源	47.5%	42.0%	50.0%	50.0%	44.7%	51.9%
产业配套	19.3%	21.8%	16.7%	21.6%	23.3%	16.1%
其他	1.6%	3.6%	3.8%	5.4%	3.9%	3.6%

图3-5-2 不同行业投资当地的主要因素

（二）受访企业投资主要依靠自身考察和当地政府招商引资落地

超半数企业赴当地投资是通过自身考察落地(54.6%)，近四成企业由当地政府招商引资落地（39.3%）；在已有项目基础上投资新项目或受同行或关联行业带动而投资的占比分别为 29.8%和 25.6%；第三方推荐和其他方式占比较低，分别为 11.8%和 4.4%。

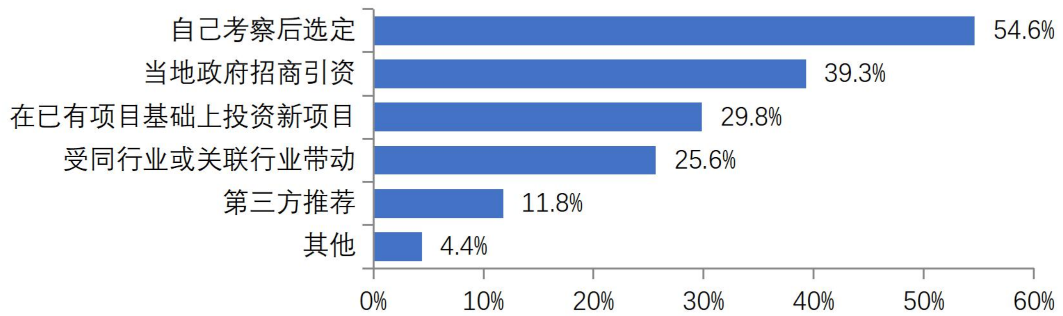


图3-5-3 企业赴当地投资的渠道

六、受访企业希望政府进一步优化营商环境

（一）政策政务环境是受访企业关注重点

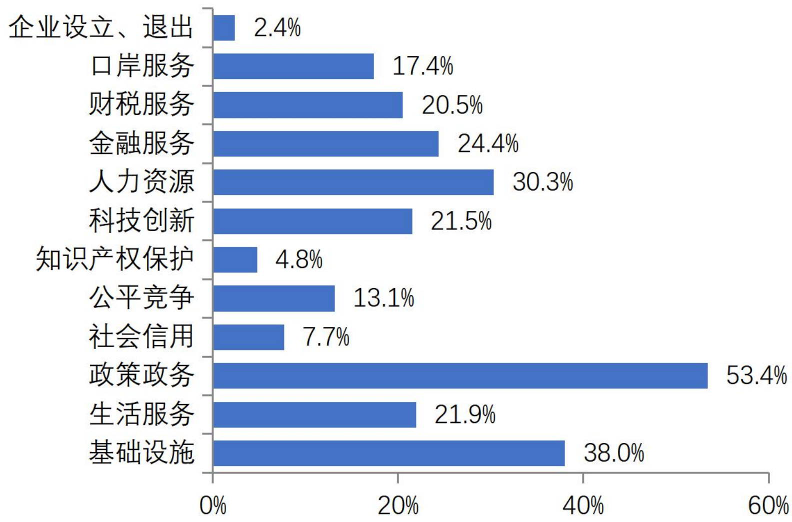


图3-6-1 企业认为政府营商环境应进一步改进的领域

在本次调研中，希望政府持续改善政策政务环境的企业占比最大（53.4%），其次是基础设施环境（38%）、人力资源环境（30.3%）和金融服务环境（24.4%）。

（二）受访企业对地区产业链建设要求较高

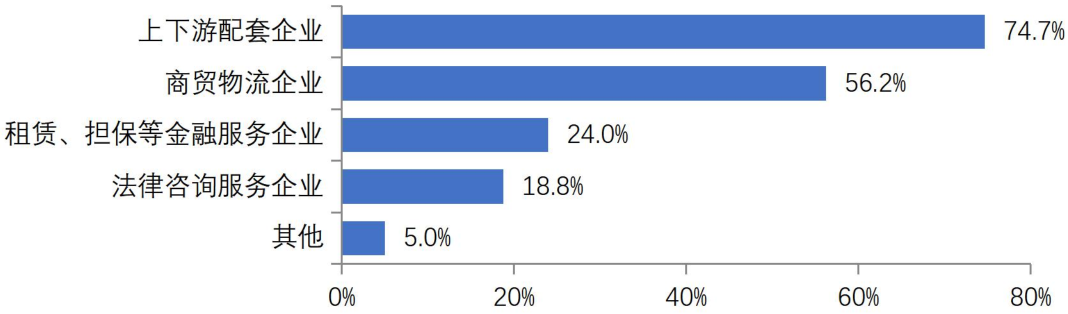


图3-6-2 所在地在招商引资中应着重引进的企业类型

调研结果显示，企业希望当地政府在招商引资中着重引进上下游配套企业（74.7%）；其次是引进商贸物流企业（56.2%）；引进租赁、担保等金融服务企业和法律咨询服务企业的占比分别为24%和18.8%。

（三）受访企业希望贸促会着重完善信息平台建设

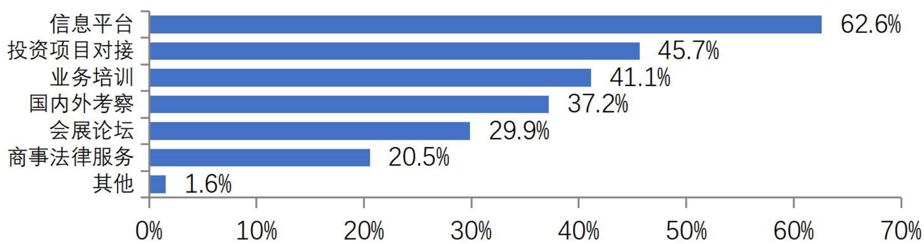


图3-6-3 贸促会应着重提供的服务

62.6%的企业希望贸促会搭建更完善信息平台，其次是投资项目对接（45.7%）。需要业务培训、国内外考察、会展论坛和商事法律服务的企业分别占 41.1%、37.2%、29.9%和 20.5%。

七、消费增长和中产阶级扩大为最重要商业机会

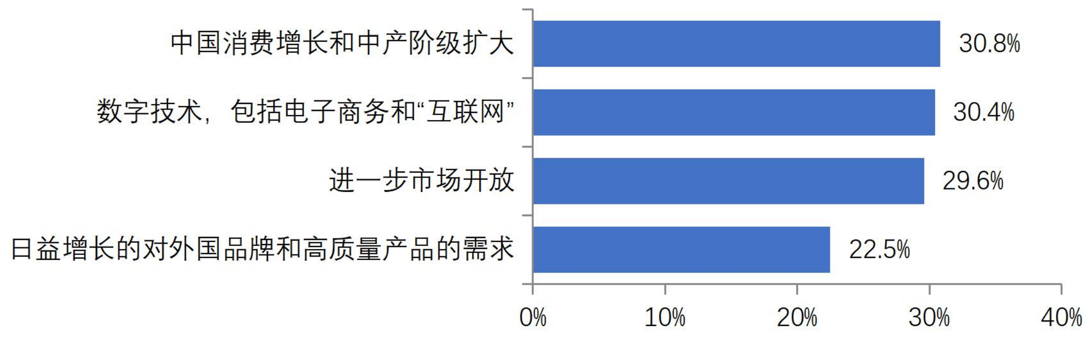


图3-7-1 中国最重要的商业机会

30.8%的企业认为“中国消费增长和中产阶级扩大”是目前中国最重要的商业机会，其次是“数字技术，包括电子商务和‘互联网’”及“进一步市场开放”，分别占 30.4%和 29.6%；22.5%的企业认为“日益增长的对外国品牌和高质量产品的需求”最为主要。

八、超五成外资企业在全球投资计划中首选中国

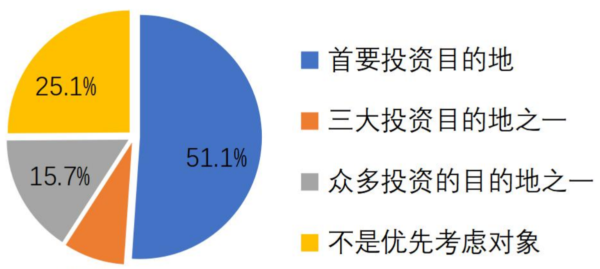


图3-8-1 中国在外企近期的全球投资计划中的重要性

超五成（51.1%）外资企业在其全球投资计划中首选投资中国；25.1%的外资企业认为中国在其全球投资计划中不是优先考虑对象；15.7%的外资企业认为中国是众多投资目的地之一；8.1%的外资企业认为中国是三大投资目的地之一。

第四章　营商环境建设成就

2020—2021 年度，各级政府密集推出营商环境优化条例，持续深入“放管服”改革，进一步扩大对外开放，积极营造市场化、法治化、国际化的营商环境，中国营商环境不断迈上新台阶。2021 年中国贸促会企业调查问卷统计结果显示，全国营商环境总得分 4.38 分，较 2020 年增长 0.03 分。

一、有效监管为简政放权提供保障

中国贸促会《2021 年度中国营商环境调查问卷》结果显示，2021 年，企业对政策政务评价为 4.45 分，较 2020 年提高 0.02 分。其中，官员廉洁程度评价达到 4.52 分，达到优秀水平。政府服务效率评价（4.46 分）紧随其后，获得较高评价。

（一）“放管服”改革进一步深化

“放管服”改革着眼培育市场主体、激发市场活力和社会创造力。自 2020 年 1 月 1 日《优化营商环境条例》正式实施以来，在行政许可事项取消下放、市场主体保护、市场环境建设、政务服务、监管执法、法治保障等多个方面都颁布实施了系列政策法规。2020 年 9 月，国务院审改办颁布了新一批取消下放的行政许可事项。至此，十八大以来，国务院已分 16 批取消下放 1094 项行政许可事项。其中，国务院部门实施的行政许可事项清单压减比例达到 47%。2021 年，《政府工作报告》首次提出“把有效监管作为简政放权的必要保障”。“有效监管”的新提法显示出国家进一步加大简政放权、优化营商环境的决心。

2021 年 6 月 2 日，李克强总理在全国深化“放管服”改革、着力培育和激发市场主体活力电视电话会议上发表重要讲话，部署持续一体推进“放管服”改革，打造市场化法治化国际化营商环境。2021 年 7 月 20 日，国务院办公厅发布《关于印发全国深化“放管服”改革着力培育和激发市场主体活力电视电话会议重点任务分工方案的通知》（国办发〔2021〕25 号）。一是直面市场主体需求，创新实

第四章

施宏观政策和深化“放管服”改革，包括落实好常态化财政资金直达机制和货币政策直达工具；在基础设施方面增加供给，提升服务质量和水平；保障基本民生，重点加强义务教育、基本医疗、基本住房等保障等。二是着力打造市场化营商环境，包括持续深化行政审批制度改革；强化企业创新主体地位，注重运用税收优惠等普惠性政策激励企业研发创新；切实维护公平竞争的市场秩序；坚持把“放”和“管”统一起来，把有效监管作为简政放权的必要保障等。三是着力打造法治化营商环境，包括建立健全营商环境法规体系，推进《优化营商环境条例》等进一步落实到位；依法保护各类市场主体产权和合法权益；严格规范公正文明执法，从源头上清理乱收费、乱罚款、乱摊派，凡违反法定权限和程序设定的罚款事项，一律取消等。四是着力打造国际化营商环境，包括加强与相关国际通行规则对接，全面落实外商投资法和相关配套法规，完善外商投资准入前国民待遇加负面清单管理制度；进一步优化外贸发展环境，继续推动降低外贸企业营商成本，清理规范口岸收费，深化国际贸易“单一窗口”建设，推动国际物流畅通等。五是进一步增强责任感，攻坚克难，推动改革举措落地见效，包括强化改革担当，加强改革统筹谋划，持续一体推进“放管服”改革；规范营商环境评价等。

（二）“互联网+监管”取得初步成效

全国一体化在线监管体系初步建成，事中事后监管效能不断提升。国家“互联网+监管”系统建设向纵深发展，实现与全国 31 个省（区、市）、新疆生产建设兵团和国务院有关部门“互联网+监管”系统互联互通，截至 2020 年底，接入各地区各部门监管应用 451 个，汇聚监管业务数据 21 亿条，发布监管动态 2 万余条，业务人员注册用户超过 200 万人。重点监管应用系统建设不断深化，风险预警、信用监管评价、监管综合分析等业务系统应用初见成效，2020 年共向地方和有关部门推送企业信用分类数据和风险预警线索 4.1 亿条，有力支撑事中事后监管工作。国家企业信用信息公示系统应用成效显著，2020 年日均访问量超过 1 亿人次，支撑以信用监管为基础的新型监管机制初步形成。全国 12315 平台持续优化提升，2020 年全年平台

访问量 7247 万人次，接收消费者投诉举报咨询 1775.1 万件，为消费者挽回经济损失 31.57 亿元。

国务院“互联网+督查”平台及小程序影响力持续提升，为企业群众搭建社情民意直通车，大范围拓宽了督查线索来源渠道，优化督查方式，提高督查实效，有力促进相关难点堵点痛点问题解决，推动党中央、国务院重大政策措施落地见效。平台与各地区和有关部门实现互联互通，为问题线索及时高效接收、梳理、分转、办理、反馈、分析、统计等全流程提供支撑保障。截至 2020 年底，平台收到留言总数超 1000 万条，访问量超 8100 万次。国务院办公厅督查室转送地方、部门核查办理问题线索 10 万余条，直接派员核查 120 余次，公开发布督查通报 150 余篇，曝光督查发现问题 300 余个，引起社会广泛关注和强烈反响，有效发挥了警示作用，放大了督查效果。随着“放管服”改革深入推进，数字营商环境不断优化，促进经济创新能力和竞争力不断提升。

二、法治化营商环境日趋完善

中国贸促会《2021 年度中国营商环境调查问卷》结果显示，受访企业普遍对社会法治环境评价较高，平均得分为 4.51 分，评价达到“优秀”水平，在 12 个一级指标中排名并列第 2 位。其中，政府依法行政和法律监督两项二级指标得分最高，均为 4.53 分。

2020 年，最高人民法院受理案件 39347 件，审结 35773 件，制定司法解释 28 件，发布指导性案例 17 个，加强对全国法院审判工作的监督指导；地方各级人民法院和专门人民法院受理案件 3080.5 万件，审结、执结 2870.5 万件，结案标的额 7.1 万亿元。

（一）营商环境法律法规建设深入推进

1. 营商环境细化条例陆续推出。

全国各地均颁布出台《优化营商环境条例》，确立了“放管服”改革关键环节的基本规范。在监管方面，“双随机、一公开”和“互联网+监管”逐步成为市场监管的基本方式和手段，包容审慎监管探索取得成效，《反不正当竞争法》完成修订，市场主体活力及发展韧性不断增强。

2. 网络安全法律法规体系初步建立。

针对当前营商环境新形势，颁布实施《网络安全法》《电子商务法》《网络安全审查办法》等网络安全法律法规，国家安全、社会公共利益和消费者权益得到有效维护；不断强化数据安全保障，《个人信息保护法（草案）》《数据安全法（草案）》等向社会公开征求意见；数字市场竞争秩序逐步规范，严厉打击网络违法犯罪，网络空间更加清朗。

3. 知识产权保护体系不断完善。

2020 年 10 月 17 日第十三届全国人民代表大会常务委员会第二十二次会议通过《关于修改〈中华人民共和国专利法〉的决定》，自 2021 年 6 月 1 日起施行。2020 年 12 月 26 日第十三届全国人民代表大会常务委员会第二十四次会议通过中华人民共和国刑法修正案(十一)，自 2021 年 3 月 1 日起施行。修正案对侵犯知识产权犯罪等罪名进行了修订，其中将“知识产权类犯罪最高刑提至 10 年”；在关于假冒注册商标罪的规定中，增加了对“服务商标”的保护；此外，修正案对于侵犯商业秘密的犯罪行为类型进行了补充，新增“商业间谍罪”。最高人民法院出台知识产权民事诉讼证据等 10 个司法解释和规范性文件，进一步方便当事人举证、缩短诉讼周期、降低维权成本、提高赔偿数额，知识产权案件判赔金额同比增长 79.3%，鼓励自主创新、推动科技进步的法治环境逐步形成。

2021 年 5 月 10 日，国家知识产权局发布《关于深化知识产权领域“放管服”改革优化创新环境和营商环境的通知》(国知发服字〔2021〕10 号)。通知提出，2021 年年底前实现高价值专利申请审查周期压缩至 13.8 个月，全面开放知识产权基础数据，突出高质量发展导向，推动知识产权工作由追求数量向提升质量转变。

（二）知识产权保护力度增强

各相关部门依法履行职责，进一步加大知识产权工作力度，持续推进重点领域治理，加强常态化司法保护。

一是知识产权案件审结率明显提升。2020 年，全国地方人民法院共新收知识产权民事一审案件 44.33 万件，审结 44.27 万件，同比

分别上升 11.10%和 12.22%。其中，新收专利案件 2.85 万件，同比上升 28.09%；商标案件 7.82 万件，同比上升 19.86%；著作权案件 31.35 万件，同比上升 6.97%。全国地方人民法院共新收知识产权民事二审案件 4.30 万件，审结 4.35 万件，同比分别下降 13.54%和 10.67%。2020 年，全国地方人民法院共新收知识产权行政一审案件 1.85 万件，审结 1.79 万件，同比分别上升 14.44%和 0.02%。全国地方人民法院新收知识产权行政二审案件 6092 件，审结 6183 件。审结案件中，维持原判 4828 件，改判 1214 件，发回重审 2 件，撤诉 114 件，驳回 4 件。2020 年，全国地方人民法院共新收侵犯知识产权罪一审案件 5544 件，审结 5520 件，同比分别上升 5.76%和 8.77%。全国地方人民法院新收涉及知识产权的刑事二审案件 869 件，审结 854 件，同比分别上升 7.55%和 5.82%。

二是知识产权刑事犯罪高压严打力度空前。开展"昆仑 2020"专项行动，将打击侵犯知识产权犯罪作为重要内容。2020 年，全国公安机关侦破侵犯知识产权和制售伪劣商品犯罪案件 2.1 万余起，抓获犯罪嫌疑人 3.2 万余名，涉案总价值 180 余亿元。针对实体市场开展执法行动 4.1 万余次，开展销毁侵权假冒商品活动 260 余次。出台《依法打击食药环和知识产权领域犯罪保障疫情防控期间复工复产十项措施》，助力新冠肺炎疫情期间企业复工复产。对国内外企业按照相同标准、相同要求进行刑事保护，侦破了一批涉及国外品牌的刑事案件，70 余家企业表示感谢，并表示对中国市场健康发展更加充满信心。

（三）司法促发展、稳预期、保民生作用明显

2020 年，最高人民法院充分发挥司法促发展、稳预期、保民生作用，及时出台审理涉疫民商事、涉外商事海事、执行案件等 4 个意见，指导各级法院妥善应对疫情引发的诉讼问题，精准服务"六稳""六保"。紧急为 1386 家防疫物资生产企业临时变更财产保全措施，支持扩产抗疫。青岛法院 4 小时内组织完成听证并裁定解冻资金，使被起诉的呼吸机企业迅速投产运营。苏州、威海、新乡等法院紧急准许处于破产阶段的企业恢复生产，确保紧缺医疗物资供应。针对受疫情影响出现的履约难问题，依法准确适用不可抗力等规则，妥善审理

相关合同违约、企业债务、房屋租赁等案件 4.3 万件。北京、上海、贵州、云南、新疆等法院落实惠企惠民政策，加强府院联动，千方百计帮助企业特别是中小微企业渡过难关，保护和激发市场主体活力。各级法院对 2.5 万家企业暂缓强制执行措施，在 18.1 万件民商事案件中采取“活封”等措施，为企业释放资金 1631 亿元、土地 869 万亩、厂房 3271 万平方米，帮扶 3.6 万家企业复工复产。坚决纠正涉疫就业歧视行为，严禁仅以劳动者曾感染新冠病毒、来自疫情严重地区为由非法解除劳动关系，依法支持并规范共享员工、网络零工等灵活就业，让群众在疫情冲击下就业得到法律保障。加强产权司法保护，依法纠正涉产权刑事冤错案件 34 件 56 人。

三、减税降费措施成效显著

世界银行发布的《2020 年世界纳税报告》对中国近年来实施的“减税降费”效果给予积极评价，中国“总税收和缴费率”指标显著降低，整体成绩稳步提升。

中国贸促会《2021 年度中国营商环境调查问卷》结果显示，2021 年，企业对财税服务评价在 12 个一级指标中位居第一，平均评价为 4.52 分，达到优秀水平。总费率（缴费占总利润的百分比）由 2020 年的 21.96%下降至 2021 年的 15.46%；总税率由 2020 年的 34.15%下降至 2021 年的 24.84%。

（一）完善减费降税政策

为激励企业创新，促进产业升级，2021 年 3 月 24 日国务院常务会议部署实施提高制造业企业研发费用加计扣除比例等政策。为落实《政府工作报告》支持企业创新有关举措，会议决定，一是 2021 年 1 月 1 日起，将制造业企业研发费用加计扣除比例由 75%提高至 100%，相当于企业每投入 100 万元研发费用，可在应纳税所得额中扣除 200 万元。二是改革研发费用加计扣除清缴核算方式，允许企业自主选择按半年享受加计扣除优惠，上半年的研发费用由次年所得税汇算清缴时扣除改为当年 10 月份预缴时扣除，让企业尽早受惠。

2021 年 3 月 31 日国务院常务会议确定了进一步支持小微企业、个体工商户和先进制造业的税收优惠政策。会议确定，一是加大小微

企业所得税优惠力度并将个体工商户纳入优惠政策范围，从 2021 年 1 月 1 日起至 2022 年底，对小微企业和个体工商户年应纳税所得额不到 100 万元部分，在现行优惠政策基础上，再减半征收所得税，进一步降低实际税负。二是从 2021 年 4 月 1 日起至 2022 年底，将小微企业、个体工商户等小规模纳税人增值税起征点，由现行月销售额 10 万元提高到 15 万元。三是从 2021 年 4 月 1 日起，将运输设备、电气机械、仪器仪表、医药、化学纤维等制造业企业纳入先进制造业企业增值税留抵退税政策范围，实行按月全额退还增量留抵税额。同时，2021 年还将继续实施制度性减税政策，包括降低增值税税率、增值税留抵退税、个人所得税、专项附加扣除等。分类调整疫情期间出台的阶段性政策，延长小规模纳税人减征增值税等政策执行期限，保持对经济恢复的必要支持力度。此外，持续实施降费措施，继续阶段性降低失业保险、工伤保险费率，取消港口建设费，降低航空公司民航发展基金征收标准，并加大各类违规涉企收费整治力度。通过多项减税降费措施。

（二）减费降税规模巨大

“十三五”时期，我国累计降税减费规模超过 7.6 万亿元，其中减税 4.7 万亿，降费 2.9 万亿。特别是 2020 年，为应对突发疫情的冲击，面对严峻的复杂形势，在财政收支比较困难的情况下，持续发布实施了 7 批 28 项减税降费政策，全年新增减税降费规模超过 2.6 万亿元，有力支持了各类市场主体复工复产复业，助力企业纾困发展，助推我国经济持续稳定恢复。我国税收占国内生产总值的比值在世界主要经济体中是最低的，比值逐年下降。通过多项减税降费措施，预计 2021 年将为全社会减负超 7000 亿元。

四、贸易投资便利化大幅提升

（一）市场准入负面清单制度全面实施

市场准入负面清单制度自 2018 年 12 月正式实施以来，按照“一年一修订”的原则，已经发布三版市场准入负面清单，2020 年版清单与 2018 年版清单相比，事项数量由 151 项缩减至 123 项，缩减比

例达到 18%，“全国一张清单”管理模式全面确立，一批妨碍市场主体公平准入的隐性壁垒得到清理破除，清单制度体系不断健全完善，投资自由化、便利化水平大幅提升。

（二）与多国自贸协定相继签署、生效

与非洲国家签署第一个自贸协定。2021 年 1 月 1 日，《中华人民共和国政府和毛里求斯共和国政府自由贸易协定》正式生效。在货物贸易领域，中方和毛里求斯最终实现零关税的产品税目比例分别达到 96.3%和 94.2%。在服务贸易领域，双方承诺开放的分部门均超过 100 个。同时，双方还在经济技术合作、原产地规则、贸易救济、技术性贸易壁垒等众多领域达成一致。

与蒙古国实施关税减让安排。2021 年 1 月 1 日，中国与蒙古国相互实施在《亚太贸易协定》项下的关税减让安排，蒙古国对 366 个税目削减关税，主要涉及水产品、蔬菜水果、动植物油、矿产品、化学制品、木材、棉纱、化学纤维、机械产品、运输设备等，平均降税幅度 24.2%。同时，中国在《亚太贸易协定》项下的关税减让安排适用于蒙古国。

与新西兰实现自贸协定升级。2021 年 1 月 26 日，中国与新西兰正式签署《中华人民共和国政府与新西兰政府关于升级<中华人民共和国政府与新西兰政府自由贸易协定>的议定书》，货物领域新增部分木材和纸制品的市场开放，进一步优化原产地规则、技术性贸易壁垒、海关便利化等贸易规则。服务贸易领域，中方在 RCEP 基础上，进一步扩大航空、教育、金融、养老、客运等领域对新方开放。新方在特色工种工作许可安排中，将中国公民申请量较大的汉语教师和中文导游赴新就业的配额在原有基础上增加一倍，分别提高到 300 名和 200 名。投资领域，新方放宽中资审查门槛，确认给予中资与《全面与进步跨太平洋伙伴关系协定》（CPTPP）成员同等的审查门槛待遇。

与十四国共同签署 RCEP。2020 年 11 月 15 日，中国、东盟十国、日本、韩国、澳大利亚和新西兰的“区域全面经济伙伴关系协定（RCEP）”正式签署，意味着全球人口最多（约占全球总人口的 1/2）、经贸规模最大（约占全球 GDP 的 1/3）、最具发展潜力（约占全球贸易额的 1/3）的自由贸易区正式起航。根据该协定，RCEP 成员将相互实施关

税减让、开放市场准入、取消贸易壁垒、简化通关程序等，推进贸易、投资便利化，将进一步降低区域贸易、投资成本，对于区域各国贸易投资增长具有积极的促进作用。

跨境电商零售进口试点进一步扩大。2020 年 1 月 17 日，商务部、发展改革委、财政部、海关总署、税务总局、市场监管总局等六部委联合印发《关于扩大跨境电商零售进口试点的通知》，扩大跨境电商零售进口试点范围。2020 年 4 月，国务院决定在全国已有 59 个跨境电商综合试验区的基础上再设 46 个综试区，跨境电商零售进口试点扩大至 86 个城市和海南全岛，覆盖 31 个省、自治区、直辖市。截至 2021 年 9 月，跨境电商综试区城市数量已达 105 个。海关总署从 2020 年开始全面推广跨境电商出口商品退货监管措施，全力支持跨境电商出口企业“卖全球”。

其他自贸协定。中国与欧盟于 2020 年 12 月 30 日完成中欧投资协定谈判，目前该协定暂时被欧洲议会冻结。中国与日韩共同推动中日韩自贸区谈判，积极促进东亚区域经济一体化发展。中国积极考虑加入 CPTPP，在竞争中性、数据跨境流动、数字服务贸易跨境交付、政府采购、知识产权保护、投资争端、集体工资谈判等新经贸规则方面加强国际接轨。

（三）自贸试验区建设成就斐然

建设自贸试验区是以习近平同志为核心的党中央在新时代推进改革开放的重要战略举措，目前已取得巨大成就。

一是自贸试验区区域布局日趋优化。21 个自贸试验区覆盖了全国东中西部各个区域，同时还增设了上海临港新片区，扩展了浙江自贸试验区的区域范围。2020 年 6 月，《海南自由贸易港建设总体方案》正式发布。目前，海南营商环境有效改善、国际化水平明显，集聚了更多的市场主体，为自由贸易港建设打下了坚实的基础。

二是制度改革持续推进。先后印发了 23 个自贸试验区总体方案，赋予 2800 多项改革试点任务，“十三五”时期自贸试验区探索形成 173 项制度创新成果向全国复制推广，累计达到了 260 项。

三是高水平对外开放向纵深发展。自贸试验区外商投资准入负面清单特别管理措施由最初的 190 项到“十三五”初期的 122 项，到

2020 年压减至 30 项，首张海南自由贸易港外商投资准入负面清单仅 27 项。

四是一批重大项目入驻各地自贸试验区。截至 2021 年 8 月底，江苏自贸试验区以全省千分之一的国土面积，集聚了 9%的高新技术企业，贡献了约 6%的新设立企业数、约 10%的实际使用外资、约 13%的进出口额，为全省高质量发展发挥了重要引擎作用。云南自贸试验区已签约项目 156 个，成功引进普洛斯环普产业园、河南保税跨境电商、华为智慧园区等重大产业项目，总投资达 660 亿元，开工项目 72 个、总投资 525 亿元。上海自贸试验区总部经济发展显著，金融产业得到较快发展；在天津自贸试验区，融资租赁产业快速发展；在浙江自贸试验区，油气全产业链快速增长；在福建自贸试验区，航空维修成为具有典型意义的发展产业；在广西自贸试验区，依托中国—东盟信息港南宁核心基地，一批数字经济项目建设正在加快推进，华为、浪潮、腾讯、科大讯飞、数字金服及阿里云计算、360 安全、奇安信等行业领军企业纷纷入驻；在山东自贸试验区青岛片区，总投资 503 亿元的 48 个代表性重点产业项目集中签约，涵盖现代海洋、国际贸易、航运物流、现代金融、先进制造等五大主导产业。

（四）口岸营商环境持续优化

2021 年 7 月 21 日，国务院常务会议对进一步深化跨境贸易便利化改革、优化口岸营商环境作出部署，提出了新的要求。为落实会议精神，海关总署各部门细化推出的 5 方面 27 项具体措施不仅有助于跨境贸易跑出“加速度”，也为打造对外开放新优势注入动力。

进出口环节监管证件精简。2021 年，进出口环节需要验核的监管证件已从 2018 年的 86 种精简至 41 种，减少了 52.3%。在这 41 种监管证件中，除 3 种证件因为特殊原因不能联网外，其余 38 种证件全部实现了网上申请、网上办理。

口岸通关信息化智能化水平大幅提升。积极拓展国际贸易“单一窗口”功能，目前“单一窗口”已实现与 25 个部门总对总的系统对接和信息共享，服务全国所有口岸和各类区域，基本满足了企业“一站式”业务的办理需求。同时，“单一窗口”与金融保险机构合作，有效解决中小微外贸企业融资难、融资贵问题，惠及企业 20 余万家。

进出口货物通关时间大幅压缩。2021 年 6 月，全国进口、出口整体通关时间分别为 36.68 小时和 1.83 小时，较 2017 年分别压缩了 62.34%和 85.15%。

中国贸促会《2021 年度中国营商环境调查问卷》结果显示，海关服务在 12 个指标中评价并列第 2，为 4.51 分，达到“优秀”水平。货物通关、检验检疫和人员出入境三个二级指标评价均较 2020 年有所提高。

五、基础设施环境持续优化

中国贸促会《2021 年度中国营商环境调查问卷》结果显示，2021 年受访企业对基础设施环境评价总体良好，为 4.35 分，较 2020 年提高 0.04 分。其中，环保设施指标评价提升最多（0.12 分），城市规划和建设与水电气供应紧随其后，分别提高 0.06 分、0.04 分。

（一）铁公机建设稳步推进

2020 年末，全国铁路营业里程 14.6 万公里，比上年末增长 5.3%，其中高铁营业里程 3.8 万公里，约占世界高铁运营里程的 70%。全国公路总里程 519.81 万公里，比上年末增长 3.7%，其中高速公路以 16.1 万公里的通车里程稳居世界之首；全国民用航空颁证机场共 241 个，比上年末增加 3 个，其中年旅客吞吐量达 1000 万人次以上的通航机场 27 个；全国内河航道通航里程 12.8 万公里，比上年末增加 387 公里，全国港口拥有生产用码头泊位 22142 个，其中万吨级及以上泊位 2592 个，占泊位总数的 11.7%，位居世界首位。

（二）新基建建设成绩斐然

1. 信息基础设施建设规模全球领先。

我国建成全球规模最大的光纤网络和 4G 网络，固定宽带家庭普及率由 2015 年底的 52.6%提升到 2020 年底的 96%，移动宽带用户普及率由 2015 年底的 57.4%提升到 2020 年底的 108%，全国行政村、贫困村通光纤和通 4G 比例均超过 98%。5G 网络建设速度和规模位居全球第一，已建成 5G 基站 71.8 万个，5G 终端连接数超过 2 亿。移动互联网用户接入流量由 2015 年底的 41.9 亿 GB 增长到 2020 年的 1656

亿 GB。国家域名数量保持全球第一位。互联网协议第六版（IPv6）规模部署取得明显成效，固定宽带和移动 LTE 网络 IPv6 升级改造全面完成，截至 2020 年底，IPv6 活跃用户数达 4.62 亿。北斗三号全球卫星导航系统开通，全球范围定位精度优于 10 米。

2. 数据中心市场规模增长迅速。

2020 年，中国数据中心市场规模为 1958 亿元，比 2019 年增加 395 亿元，预计到 2025 年这一规模将突破 5900 亿元。2020 年，中国云计算市场规模达到 1776.4 亿元，比 2019 年增长 33.41%，预计 2021 年该市场仍将保持现有增速，达到 2330.6 亿元。未来，中国云计算市场仍将保持高速增长。随着 5G 的大规模商用，边缘计算由探索走向商用，逐渐成为垂直行业数字化转型的刚需。2021 年，中国有 3.37% 的企业已经应用了边缘计算，计划使用边缘计算的企业占比达到 44.23%。超级计算中心建设进入快车道，截至 2020 年底，中国已建和在建的超级计算中心超过 10 家。工信部发布的《新型数据中心发展三年行动计划(2021—2023 年)》明确，用 3 年时间，基本形成布局合理、技术先进、绿色低碳、算力规模与数字经济增长相适应的新型数据中心发展格局。

“东数西算”工程启动实施。2021 年 5 月 24 日，国家发展改革委、中央网信办、工业和信息化部、国家能源局四部委联合发布《全国一体化大数据中心协同创新体系算力枢纽实施方案》，提出在京津冀、长三角、粤港澳大湾区、成渝以及贵州、内蒙古、甘肃、宁夏建设全国算力网络国家枢纽节点，启动实施“东数西算”工程，构建国家算力网络体系，发展数据中心集群，引导数据中心集约化、规模化、绿色化发展。

3. 网络空间国际合作深化拓展。

我国积极参与联合国、二十国集团（G20）、金砖国家（BRICS）、亚太经济合作组织（APEC）、WTO（世界贸易组织）等多边机制数字领域国际规则制定，倡导发起《二十国集团数字经济发展与合作倡议》《“一带一路”数字经济国际合作倡议》《携手构建网络空间命运共同体行动倡议》《全球数据安全倡议》，为全球数字经济发展和网络空间治理贡献中国方案。截至 2020 年底，我国已与 16 个国家签署“数

字丝绸之路”合作谅解备忘录，与 22 个国家建立“丝路电商”双边合作机制。网络互通深入推进，我国与共建“一带一路”的沿线十几个国家建成有关陆缆海缆，系统容量超过 100Tbps，直接连通亚洲、非洲、欧洲等世界各地。信息通信技术、产品和服务国际市场竞争力大幅提升。

中国国际贸易促进委员会
CHINA COUNCIL FOR THE PROMOTION OF INTERNATIONAL TRADE

China's Business Environment

Annual Report (2021)

Department of Trade and Investment Promotion of CCPIT

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Contents

Preface

I. Background and Significance of the Research

Improving business environment represents a major decision made by the Chinese government in light of the development of the new area. The Chinese leaders have stressed the importance of business environment construction on several major occasions. On the 18th meeting of the central committee for deepening overall reform, President Xi Jinping proposed to give full play to deepen the reforms in an all-round way, improve the legal systems for market access, property rights protection and credit systems construction, accelerate the marketization legalization and internationalization of business environment. In the same month, Xi published a signed article in *Qiushi*, emphasized to break industrial monopolies and local protectionism, remove bottlenecks in the economic cycle, and promote the formation of a national united normal market system with fair competition. At the Executive Meeting of the State Council, Premier Li Keqiang noted that improving business environment is the key to more energizing market entities and an important measure to address the grim and complex situation and promote economic stability and recovery. The *Report on the Work of the Government(2022)* stressed that (Chinese) goverment should deepen the reform to streamline administration and delegate power, improve regulation, and upgrade services to improve business environment.

By deepening the reform to streamline administration and delegate power, improve regulation, and upgrade services, actively improving laws and regulations, and vigorously implementing policies to cut taxes and fees, China has achieved positive results in improving business environment. As a result, the national economy has become more stable, the foundation for development has become more solid, and market players have become more active. In 2021, China's Gross Domestic Product (GDP) reached CNY 114.4 trillion, with a year-on-year growth of 8.1% (calculated at comparable prices), including a year-on-year growth of 7.1% for primary industry, 8.2% for secondary industry and 8.2% for tertiary industry. A total of 13.3million tax-related market entities were newly opened, with a year-on-year growth of 15.9%. The number of new tax-related market entities nationwide exceeded 36,000 per day, making a record high in recent years.

However, improving business environment is an on-going process, we must also recognize that there is still a long way to go in this regard, so as to meet the requirements of the decision and deployment made by the Chinese government, of the international standards, and of the expectations of our enterprises and people. Improving business environment is a systematic and long-term project that requires concerted efforts from all parties, with proactive actions and enhanced implementation. The good decisions and policies of the Chinese government should be truly translated into a sense of fulfillment, happiness and security for the Chinese enterprises and people, and into a encouragement for sustained economic development. Therefore, the Department of Trade and Investment Promotion (the "DTIP"), China Council for the Promotion of International Trade(CCPIT) and the Academy of CCPIT (the "Academy"), on the basis of conducting surveys and issuing annual reports on the business environment in China for five consecutive years (since 2016), have continued carrying out the work in 2021, aiming to closely track and analyze the changing business environment in China, comprehensively and objectively reflect the achievements and problems in improving business environment, and put forward opinions and suggestions, so as to help improve business environment, further stimulate enterprises' creativity and market vitality, and promote economic and social development.

II. Research Methods

The research project adopted a combination of methods including questionnaire survey, field investigation, enterprise symposium, comparative analysis and literature analysis.

(I) Questionnaire survey

From April to August 2021, the DTIP and the Academy, together with 28 local branches of CCPIT, a number of sub-councils for different industries and the Service Centers of Pilot Free Trade Zones, CCPIT, jointly organized and carried out the questionnaire survey of enterprises on China's business environment in 2021 (see Appendix 1). In the survey, a total of 4,630 questionnaires were collected, including 2,291 online and 2,339 offline. More than 300 questionnaires were collected by local branches of CCPIT in Yunnan, Shandong, Jiangxi, Guizhou, and Xinjiang. The number of questionnaires collected by local branches of CCPIT in Inner Mongolia, Jiangsu and Shanxi increased significantly compared with that of 2020. From the enterprise questionnaire survey, the research team obtained relevant data of different regions, industries and enterprises of different ownerships, which provided objective data support for the analysis and evaluation of the national business environment.

(II) Field investigation

From April to September 2021, the DTIP and the Academy formed a survey group to conduct research in Yunnan, Guangxi, Heilongjiang, Jiangxi, Jiangsu and other regions, cities and provinces. With the strong support from local governments, associations, management committees of industrial parks as well as the enterprises, the survey group visited nearly 20 industrial parks on the spot, including Nanjing area of Jiangsu Free Trade Zone, and held discussions with more than 270 enterprises (see Appendix 2 for the detailed name list of the survey group).

The survey group had face-to-face and in-depth exchanges with members of the management committees of industrial parks and representatives of enterprises, learned about the current situation, achievements and problems of business environment in different regions from different perspectives, and verified and supplemented information on the questionnaires of enterprises, which laid a solid foundation for a comprehensive and objective evaluation of the business environment in China.

(III) Enterprise symposium

In December 2021, CCPIT and Shandong Province jointly held the Dialogue between Governments and Enterprises on Optimizing Business Environment in a bid to actively stabilize foreign investment and foreign trade, further strengthen the promotion and protection of foreign investment, and promote the optimization of foreign investment environment. The event was attended by the responsible persons of relevant departments of Shandong Province, representatives of foreign embassies and consulates in China, representatives of some foreign business associations and representatives of enterprises. The main venues were set up in Beijing and Shandong to serve as a platform for communication between governments and enterprises to discuss and exchange ideas on the current economic situation, business environment construction, problems encountered by foreign-owned and foreign trade enterprises as well as the policy demands. The research team has sent representatives to participate in the event.

In addition, the survey group, jointly with CCPIT Shandong Sub-council, held an online business environment survey in 15 cities in Shandong in July 2021, conducted discussions with nearly 160 enterprises and obtained abundant first-hand information.

(IV) Comparative analysis

The research team selected the data related to China's business environment in 2021 and 2020 for horizontal and vertical comparison, so as to learn about the dynamic changes among different regions, different industries (traditional manufacturing, high-tech, resources, construction and service industries, etc.) and enterprises of different nature (state-owned and state-holding enterprises, private enterprises, Sino-foreign joint ventures, cooperative enterprises, wholly foreign-owned enterprises, etc.), have an in-depth understanding of the differences, characteristics and trends of the business environment among different regions, industries and enterprises, promote the experience models for improving the business environment in different regions, and encourage them to learn from each other and make common progress.

(V) Literature analysis

The research team collected and sorted out domestic and foreign literature, and consulted the data of the World Bank, the National Development and Reform Commission, the Ministry of Commerce, the State Administration for Market Regulation, the National Bureau of Statistics and other ministries and commissions on optimizing business environment. In addition, the sub-councils and branches of CCPIT in Yunnan, Guangxi, Heilongjiang, Jiangxi, Jiangsu, etc. also provided relevant information on business environment. The extensive collection, identification, sorting out and absorbing of useful materials conducted by the survey group have further enriched the content of the report.

III. Evaluation Indexes

Referring to CCPIT's Business Environment Evaluation Index System issued in 2020 and drawing lessons from and absorbing WB's Doing Business Index System, the research team improved the 2021 China Business Environment Evaluation Index System and the corresponding enterprise questionnaire according to the wide consultation of expert opinions and the special situation of the year.

After repeated demonstration and analysis, the research team designed 12 first-level indexes and 48 second-level indexes for business environment evaluation. Each first-level index was obtained by weighting and averaging the second-level index (Table 0-1). The comprehensive evaluation was scored directly by the enterprise and the arithmetic average was taken.

The 12 first-level indexes include infrastructure environment, life-support service environment, policy and government administration environment, social credit environment, fair competition environment, rule of law, technology innovation environment, human resources environment, financial service environment, fiscal and tax service environment, customs service environment and enterprise establishment and withdrawal environment. Among them, rule of law is a new first-level index for 2021, and customs service environment is the original "port service environment". Only the name of the first-level index is adjusted for accurate expression.

Table 0-1 General Survey and Evaluation Indexes for China's Business Environment in 2021 and Their Weights

First-level indexes	Second-level indexes
Infrastructure environment	Transportation (1/5) Network communication (1/5) Environmental protection facilities (1/5) Water, electricity and gas supply (1/5)

	Urban planning and construction (1/5)
Life-support service environment	Living conditions (1/6) Health care (1/6) Sports facilities (1/6) Education level (1/6) Environmental protection (1/6) Public security (1/6)
Policy and government administration environment	Policy equity (1/5) Efficiency of government services (1/5) Intensity of policy implementation (1/5) Official integrity (1/5) Predictability (1/5)
Social credit environment	Construction of punishment and reward mechanism (1/3) Government credit (1/3) Construction of credit system (1/3)
Fair competition environment	Market supervision (1/5) Administrative monopoly governance (2/5) Government procurement (1/5) Market access (1/5)
rule of law	NPC legislation and legal supervision (1/6) Government administration according to law (1/6) Case conclusion by court on schedule (1/6) Case conclusion by arbitration court on schedule (1/6) Enforcement of court decisions and arbitral awards (1/6) Intellectual property protection (1/6)
Technological innovation environment	Implementation of R&D tax credit policy (1/5) Intellectual property collateralization (1/5) Industry-university-research combination (1/5) Business incubation service (1/5) Public service platform construction (1/5) Enterprise R&D investment, intellectual property processing cycle
Human resources environment	Availability of skilled labor (1/4) Availability of middle and senior managers (1/4) Availability of social specialized talents (1/4) Availability of innovative and entrepreneurial talents (1/4) Proportion of labor cost in total cost; annual rate of increase in labor cost
Financial service environment	Financing convenience (1/2) Diversity of financing channels (1/2) Proportion of financing cost in total cost; annual rate of increase in financing cost
Fiscal and tax service environment	Standardization of fiscal and tax law enforcement (1/2) Processing time for tax refund (1/2) Number of tax payment, tax payment time, total fee rate, total tax rate, time of receipt of export tax refund
Customs service environment	Goods clearance (1/3) Inspection and quarantine (1/3) Personnel entry and exit (1/3) Export time (documents, borders); export fees (documents, borders); import time (documents, borders); import fees (documents, borders)
Enterprise establishment and withdrawal environment	Land acquisition (1/3) Environmental protection procedure (1/3) Bankruptcy procedure (1/3) Procedures, time and rates for starting business; procedures, time and rates for property right registration; procedures, time limit and rates for handling construction permit; handling links, application materials and handling time limit of access to electricity; handling links to report the installation of water and gas; procedures, handling links, application materials and handling time limit of access to credit; bankruptcy litigation cost rate; liquidation recovery rate; materials for enterprise cancellation; fees for enterprise cancellation

Each index covers a range of 1-5 points. In order to facilitate the qualitative analysis based on quantification, the research team identified 4.5-5 scores as very satisfied (excellent), 3.5-4.5 (excluded) as satisfied, 2.5-3.5 (excluded) as merely fair, 1.5-2.5 (excluded) as poor and 1.5 (excluded) and below as very poor.

IV. Respondent Composition

(I) Over 70% of the surveyed enterprises are private enterprises

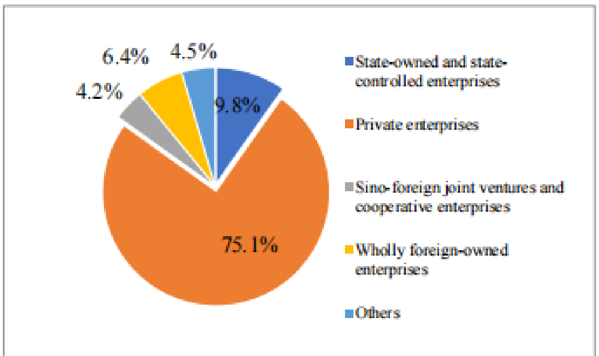


Figure 0-1 Type Distribution of Surveyed Enterprises

Among the 4,485 enterprises involved in the survey, 75.1% are private enterprises; 9.8% are state-owned and state-controlled enterprises (hereinafter referred to as "state-owned enterprises"); 6.4% are wholly foreign-owned enterprises; enterprises of other ownerships and Sino-foreign joint ventures and cooperative enterprises take similar shares, accounting for 4.5% and 4.2% respectively.

(II) Enterprises engaged in traditional manufacturing industry account for over 1/3

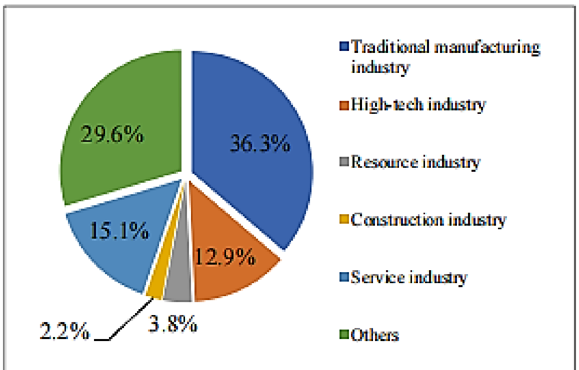


Figure 0-2 Industry Distribution of Surveyed Enterprises

Among the enterprises involved in the survey, 36.3% are engaged in traditional manufacturing industry, 15.1% in service industry, 12.9% in high-tech industry, 3.8% in resources industry, 2.2% in construction industry, and 29.6% in other industries.

(III) Micro and small enterprises account for over 60%

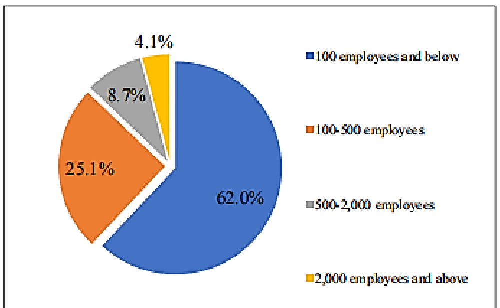


Figure 0-3 Distribution of Enterprises by Scale

Among the enterprises involved in the survey, 62% are micro and small enterprises with 100 employees and below; 25.1% have 100-500 employees; 8.7% have 500-2,000 employees; and 4.1% are super large enterprises with 2,000 employees and above.

(IV) Over half of the enterprises have a registered capital of less than CNY 20 million

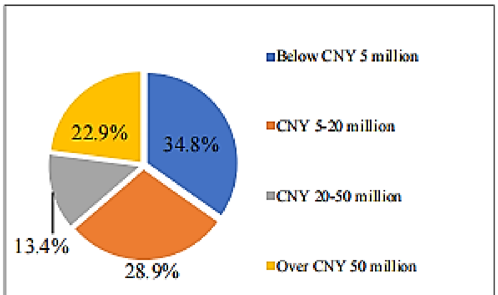


Figure 0-4 Distribution of Surveyed Enterprises by Registered Capital

Among the surveyed enterprises, 34.8% have registered with a capital of less than CNY 5 million, 28.9% with CNY 5-20 million, 13.4% with CNY 20-50 million, and 22.9% with more than CNY 50 million.

(V) Over 70% of the surveyed enterprises have continuously operated for more than five years

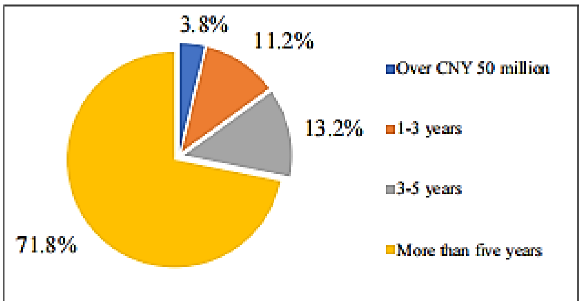


Figure 0-5 Distribution of Surveyed Enterprises by Continuous Operation Length

Among the enterprises involved in the survey, 3.8% are newly established with a history of less than one year, 11.2% operated for 1-3 years, 13.2% for 3-5 years, and 71.8% for more than five years.

V. Main Conclusions

(I) Enterprises generally gave good evaluation for China's business environment in 2021

In 2021, affected by COVID-19 and uncertainties in economic and trade situation, China's economic development still faces a number of risks and challenges. According to the unified deployment by the CPC Central Committee and the State Council, in 2021, China will continue to consolidate and expand the achievements of COVID-19 prevention & control and economic & social development, better coordinate development and security, fully implement the work of "six stabilizations" (stability in employment, financial operations, foreign trade, foreign investment, domestic investment, and expectations) and the tasks of "six guarantees" (security in employment, basic living needs, operations of market entities, food and energy, stable industrial and supply chains, and normal functioning of primary-level governments), implement the macro policies in a scientific and accurate manner, strive to keep the economy running at a reasonable interval, insist on the strategy of expanding domestic demand, strengthen the strategic support of science and technology, open wider to the outside world, and maintain social harmony and stability.

In 2021, China business environment score is 4.38, 0.03 higher than that in 2020, showing continuous improvement in business environment. Among the 12 first-level indexes, the evaluation of 11 indexes was increased, and that of 1 index was slightly declined. The evaluation of fiscal and tax service environment is the highest, followed by customs service environment, rule of law and social credit environment. The evaluation of human resources service environment and financial service environment is relatively low. China’s eastern region, Sino-foreign joint ventures and co-operative enterprises and traditional manufacturing industry contributed high scores, while the overall evaluation of business environment by the western region, enterprises of other ownerships, resource industry and service industry has declined.

In 2021, while more than 70% of enterprises were hit by COVID-19,. However, more than 70% of enterprises achieved revenue growth. Corporate investment was mainly driven by use of local resources and market expansion, with China's growing consumption and expanding middle class replacing digital technology as the most important business opportunity. More than half of the surveyed foreign-owned enterprises regarded China as their top global investment destination, but 28% of them said that they had no plan to put additional investment in China.

(II) China's business environment continued to improve

The main achievements of China's business environment construction in 2021 included: 1. The effective regulatory system provided a guarantee for streamlining administration and delegating power; 2. The law-based business environment was improved; 3. The measures to cut taxes and fees produced remarkable results, and enterprises get the benefits of “real money”; 4. Trade and investment was enhanced significantly; 5. Traditional infrastructure and "new infrastructure" continued to improve.

In addition, during the “13th Five-Year Plan” period, China's business environment continued to improve. Local governments conducted original and differential explorations, and formed a number of reform measures and typical experiences, which were proved to be available, gained the support of market entities and satisfied the people , helping promote mutual learning among local governments and further improve the business environment.

(III) There is still room for improvement in business environment

Combining the statistical results and field research, the research team has identified the following problems in China's business environment: 1. Government services in some regions were still weak; 2. Some policies needed to be more scientific; 3. The production cost of enterprises was increased significantly; 4. Many regions reported difficulties in recruiting staff; 5. Financing difficulties still restricted the development of enterprises; 6. Relevant supporting facilities still needed to be equipped; 7. International uncertainties were increasing.

(IV) Countermeasures and suggestions

To address the above problems, combining the field research conclusions and opinions from experts and scholars, the research team proposed the following suggestions: 1. Building a high-quality and efficient service-oriented government; 2. Making our policies more scientific; 3. Taking multiple measures to reduce production costs; 4. Breaking the bottleneck in attracting, retaining and utilizing talents; 5. Effectively solving the problem of difficult and expensive financing for enterprises; 6. Improving the supporting facilities; 7. Providing multiple channels to help enterprises reduce the uncertainty risks.

Chapter I　Overall Evaluation on China's Business Environment

According to the questionnaire survey, China's business environment has continued to improve in 2021, with 4.38 overall scores from the surveyed enterprises, an increase of 0.03 compared with that in 2020. More than 50% of the surveyed enterprises were "very satisfied" with the business environment, and more than 80% of the enterprises believed that the business environment has “improved".[①]

I. Business Environment Was Generally Evaluated as Good

(I) More than 50% of the surveyed enterprises were "very satisfied" with the business environment

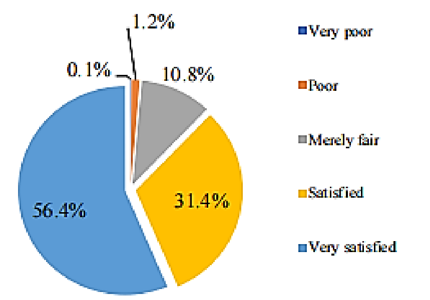


Figure 1-1-1 Satisfaction of China's Business Environment in 2021

Enterprises were generally highly satisfied with China’s business environment in 2021. 56.4% of them were "very satisfied" and 31.4% “satisfied”; 10.8% evaluated the environment as “merely fair” and 1.2% as “poor”; only 0.1% evaluated the environment as very poor.

(II) Over 80% of the surveyed enterprises believed that the business environment has “improved”

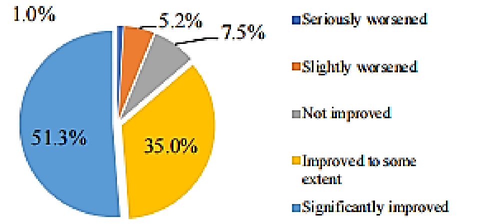


Figure 1-1-2 Improvement of China's Business Environment in the Past Three Years

51.3% of the enterprises believed that China’s business environment has “significantly improved” over the past three years, 35% believed that it has

[①]Note: The data involved in Chapters I, II and III of this report are mainly from the enterprise questionnaire survey on business environment conducted by CCPIT in 2021.

“improved to some extent”, and 7.5% saw “no improvement”; 6.2% felt that it has worsened (including “seriously worsened” and “slightly worsened”), and this proportion was slightly higher than that in 2020 (4.5%).

In the past three years, the improvement of the business environment in the regions where the surveyed enterprises are located was very similar to the improvement of the business environment in China. 49.8% (51.3% nationwide) of the enterprises believed that their regional business environment has “significantly improved”, and 1.9% (1% nationwide) considered that the business environment has "seriously worsened".

(III) The fiscal and tax service environment were evaluated highly, and the scores on human resources environment were low

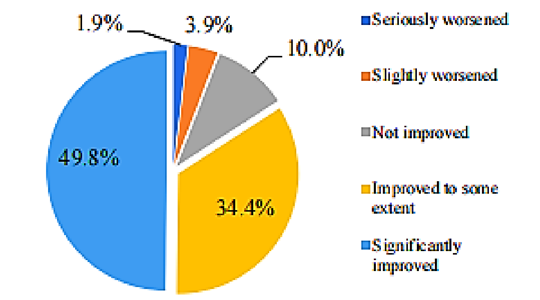
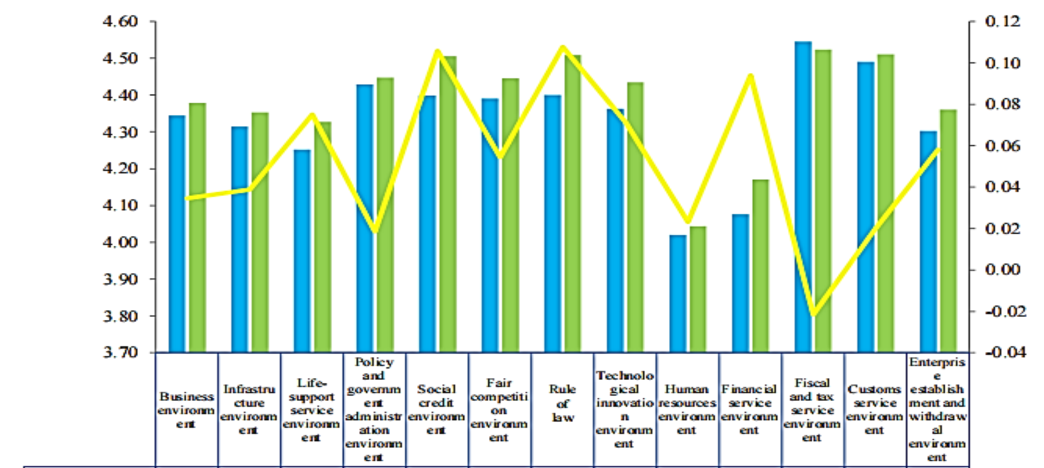


Figure 1-1-3 Improvement of Business Environment in Regions Where Enterprises Are Located in the Past Three Years

The score on national business environment in 2021 was 4.38, which was in the range of “good”. Falling within the range of 4.00-4.52, the scores on the 12 first-level indexes were good. The human resources service environment was the lowest with the score of 4.04, followed by financial service environment 4.17; the fiscal and tax service environment was the highest with the score of 4.52; the customs service environment, rule of law and social credit environment were evaluated highly with the score of 4.51, all reaching the “Excellent” level.

The overall evaluation of China's business environment in 2021 was 0.03 higher than that in 2020. The score on fiscal and tax service environment in 2021 was 0.02 lower than that in 2020, but it still ranked first among the 12 first-level indexes; the score on social credit environment increased by 0.11, the financial service environment by 0.09, the life-support service environment and scientific and technological innovation environment by 0.07, and the enterprise establishment and withdrawal environment by 0.06 .



	Business environment	Infrastructure environment	Life-support service environment	Policy and government administration environment	Social credit environment	Fair competition environment	Rule of law	Technological innovation environment	Human resources environment	Financial service environment	Fiscal and tax service environment	Customs service environment	Enterprise establishment and withdrawal environment
2020	4.34	4.31	4.25	4.43	4.40	4.39	4.40	4.36	4.02	4.08	4.54	4.49	4.30
2021	4.38	4.35	4.33	4.45	4.51	4.44	4.51	4.43	4.04	4.17	4.52	4.51	4.36
Difference	0.03	0.04	0.07	0.02	0.11	0.05	0.11	0.07	0.02	0.09	-0.02	0.02	0.06

Figure 1-1-4 Evaluation on the Sub-divided Indexes of China's Business Environment in 2020-2021

II. China’s Eastern and Central Regions Gave Higher Evaluation

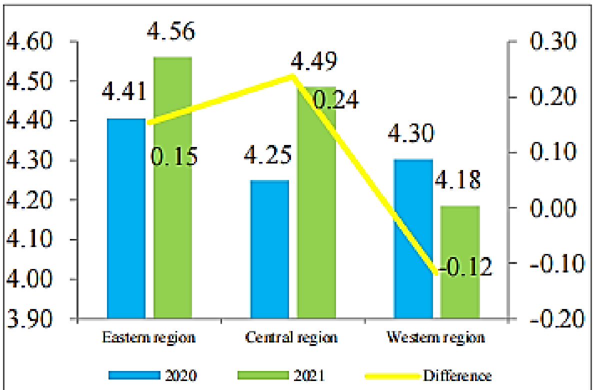


Figure 1-2-1 Evaluation on Business Environment of Enterprises in Different Regions

Different regions have obtained different scores on business environment. The eastern region had the highest score of 4.56, the central region had 4.49 with fair evaluation, and the western region had the lowest score of 4.18. The difference between the eastern and central regions was 0.38, which was significant.

The eastern and central regions have made certain improvement in the evaluation of business environment in 2021 compared with 2020. The score of the eastern region has increased by 0.15 and the central region by 0.24. The score of the western region has declined by 0.12.

III. Sino-foreign Joint Ventures and Cooperative Enterprises Gave High Evaluation

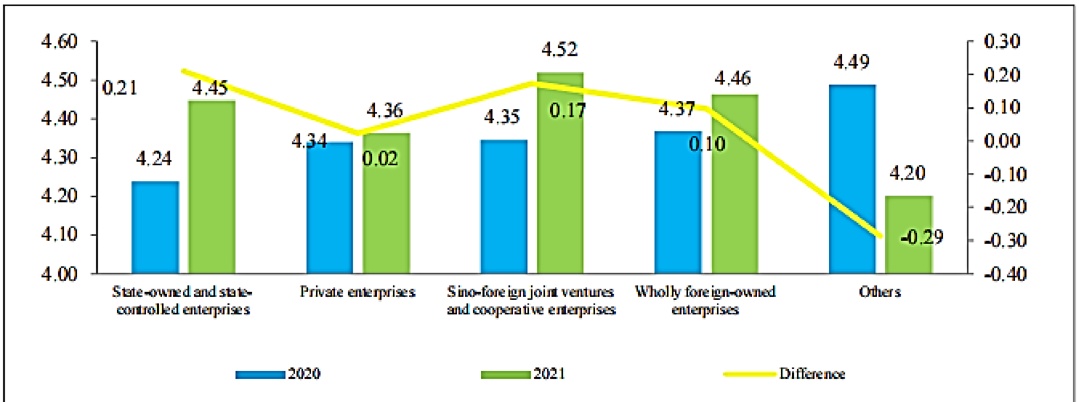
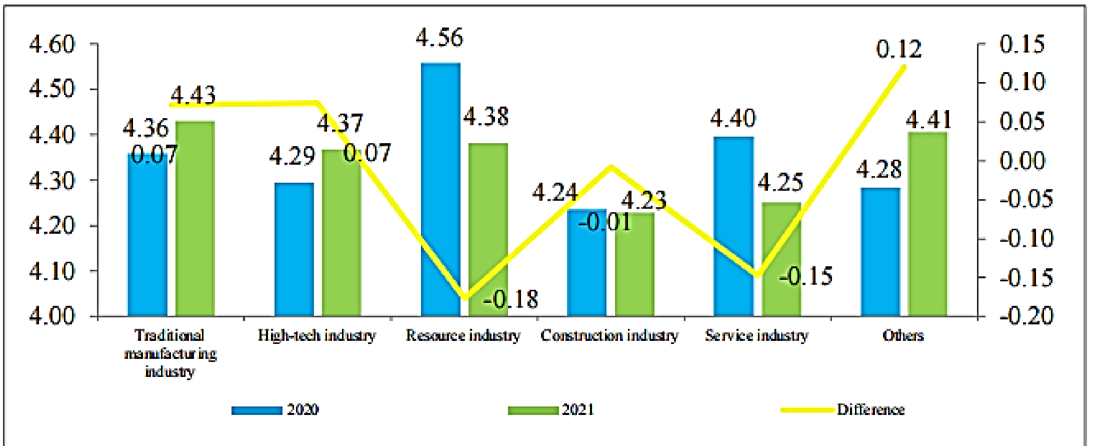


Figure 1-3-1 Evaluation on Business Environment of Enterprises in Different Ownerships

From the perspective of different ownerships, Sino-foreign joint ventures and cooperative enterprises gave the highest score of 4.52, and enterprises of other ownerships (including collective ownership enterprises and joint enterprises) gave the lowest score of 4.20, 0.32 lower than the highest score; wholly foreign-owned enterprises, state-owned enterprises and private enterprises gave moderate scores of 4.46, 4.45 and 4.36 respectively.

Compared with 2020, in 2021, the score of Sino-foreign joint ventures and cooperative enterprises has increased by 0.17; that of wholly foreign-owned enterprises increased by 0.1; that of state-owned enterprises increased by 0.21; that of private enterprises increased by 0.02, that of enterprises of other ownerships declined by 0.29.

IV. Traditional Manufacturing Industry Gave Higher Evaluation, with Rapidly Enhanced Evaluation from Other Industries



1-4-1 Evaluation on Business Environment of Enterprises in Different Industries

The evaluation for business environment of all industries was good or above. Traditional manufacturing industry gave the highest score of 4.43, followed by other industries of 4.41; construction industry gave the lowest score of 4.23; resources industry, high-tech industry and service industry gave the scores of 4.38, 4.37 and 4.25 respectively.

Compared with 2020, the evaluation score for business environment of other industries has improved the most in 2021, from 4.28 to 4.41 (by 0.12); both the high-tech industry and traditional manufacturing industry followed with an increase of 0.07; the score of the construction industry has declined little by 0.01; the score of the resources industry and service industry have declined by 0.18 and 0.15 respectively.

Chapter II　Evaluation on the Sub-divided Indexes of Business Environment

The evaluation on the sub-divided indexes of China's business environment mainly covers 12 first-level indexes (including infrastructure environment, policy and government administration environment, customs service environment) and 48 second-level indexes. According to the Enterprise Questionnaire survey, enterprises gave a good overall evaluation on China’s business environment in 2021. Among the first-level indexes, most of indexes have been improved compared with those in 2020, except for fiscal and tax service environment.

I. Infrastructure: Higher Evaluation on Water, Electricity and Gas Supply; Enhanced Evaluation in China’s Eastern and Central Regions

The infrastructure environment index is sub-divided into five second-level indexes, i.e. transportation, network communications, water, electricity and gas supply, environmental protection facilities and urban planning and construction. In 2021, the surveyed enterprises gave a good overall evaluation on the infrastructure environment with a score of 4.35, 0.04 higher than that of 2020, but the evaluation had significant differences between regions and industries.

(I) High evaluation on water, electricity and gas supply; low evaluation on transportation index

Among the second-level indexes, water, electricity and gas supply achieved the highest score of 4.43, followed by 4.40 for environmental protection facilities. Transportation had the lowest score of 4.23, and the scores of urban planning and construction and network communications were 4.33 and 4.38 respectively.

Compared with 2020, the evaluation on the index of environmental protection facilities has improved the most (by 0.12 points), followed by urban planning and construction, water, electricity and gas supply (by 0.06 and 0.04 respectively); the evaluation on transportation declined by 0.04, the only second-level index of infrastructure environment showing negative growth.

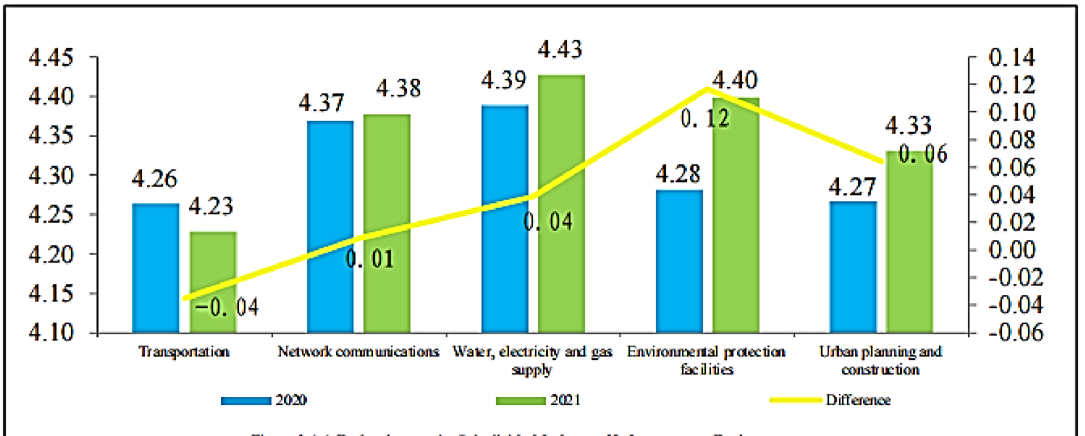


Figure 2-1-1 Evaluation on the Sub-divided Indexes of Infrastructure Environment

(II) The evaluation in the eastern and central regions was significantly higher than that in the western region

The evaluation on infrastructure environment in the eastern region had the highest score of 4.53, 0.13 higher than that of the previous year; the evaluation in the central region has improved the most, with a score of 4.44, an increase of 0.23; the western region saw a negative growth, decreasing by 0.08 from the previous year to 4.15.

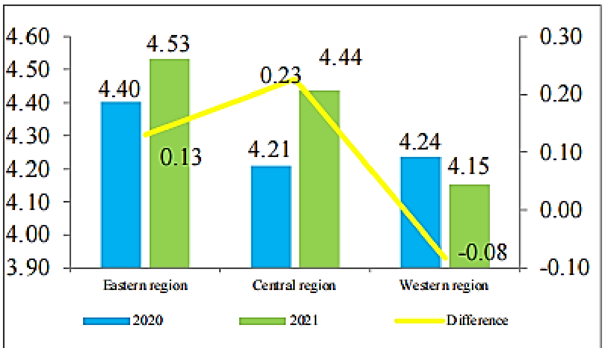


Figure 2-1-2 Comparison of Evaluation on Infrastructure Environment in Different Regions

(III) The wholly foreign-owned enterprises gave high evaluation, and enterprises of other ownerships gave low evaluation

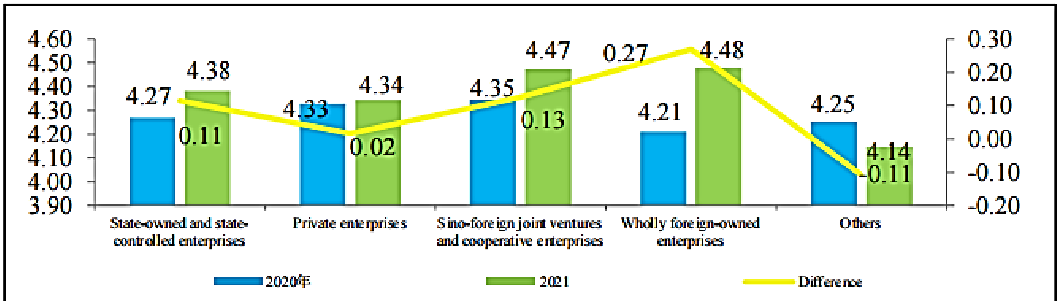


Figure 2-1-3 Evaluation on Infrastructure Environment of Enterprises of Different Ownerships

There were some differences in the evaluation on infrastructure environment of enterprises of different ownerships. The wholly foreign-owned enterprise gave the highest evaluation score (4.48), 0.27 higher than the previous year; the Sino-foreign joint ventures and cooperative enterprises gave relatively higher score (4.47), 0.13 higher than the previous year; the enterprises of other ownerships gave the lowest score (4.14), 0.11 lower than the previous year; the state-owned enterprises and private enterprises gave the moderate scores (4.38 and 4.34), 0.11 and 0.02 higher than the previous year respectively.

(IV) High evaluation in traditional manufacturing industry,and low evaluation in construction industry

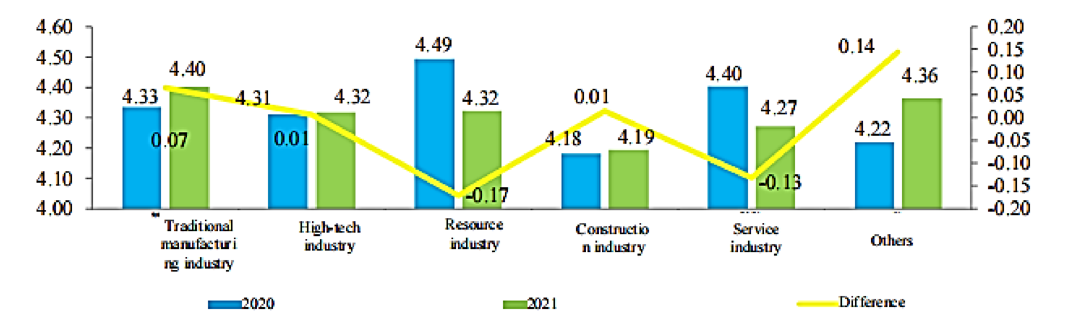


Figure 2-1-4 Comparison of Evaluation on Infrastructure Environment in Different Industries

The traditional manufacturing industry gave the highest evaluation score of 4.40 for infrastructure environment, followed by 4.36 of other industries; the construction industry gave the lowest score of 4.19; resources industry, high-tech industry and service industry gave the moderate scores of 4.32, 4.32 and 4.27 respectively.

The scores improved by 0.14 and 0.07; the scores of both the high-tech industry and construction industry increased slightly by 0.01; the score of the resources industry and service industry declined by 0.17 and 0.13 respectively.

II. Life-support Services: Higher Evaluation on Public Security, Lower on Cultural and Sports Facilities

The life-support service environment index was sub-divided into six second-level indexes, i.e. living conditions, health care, sports facilities, education level, environmental protection and public security. In 2021, the surveyed enterprises had a low overall evaluation on life-support service environment, with a score of 4.33, which ranked 10th among the 12 first-level indexes.

（I）High evaluation on public security, low on sports facilities

Among the sub-divided indexes, public security had the highest score of 4.53, reaching the excellent level. The education level had a lower score of 4.22. The evaluations on cultural and sports facilities and health care

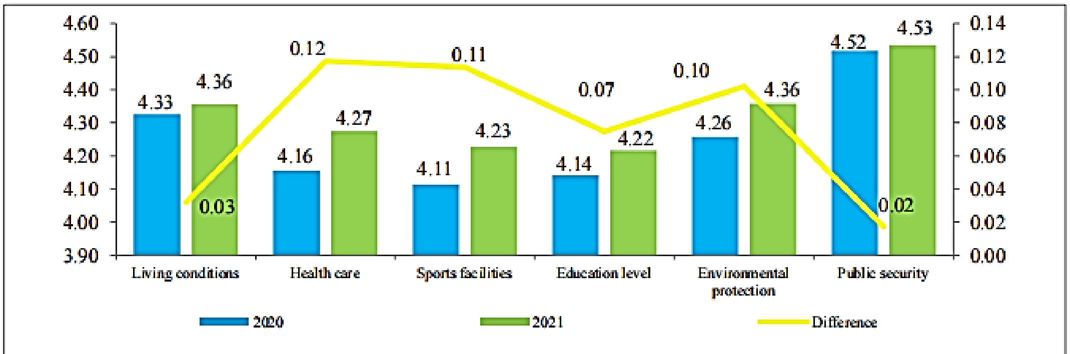


Figure 2-2-1 Evaluation on the Sub-divided Indexes of Life-support Service Environment

were also low, with the scores of 4.23 and 4.27 respectively. Both the evaluations on environmental protection and living conditions stayed in the middle, with a score of 4.36.

Compared with 2020, the evaluation score on health care has improved the most (by 0.12); the scores on cultural and sports facilities and environmental protection improved by 0.11 and 0.1 respectively; the scores on education level, living conditions and public security improved by 0.07, 0.03 and 0.02 respectively.

(II) High evaluations in the eastern and central regions; low evaluation in the western region

The evaluation score on life-support service environment in the eastern region was the highest at 4.48, 0.13 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.43, an increase of 0.27; the western region saw a negative growth, decreasing by 0.03 from the previous year to 4.14.

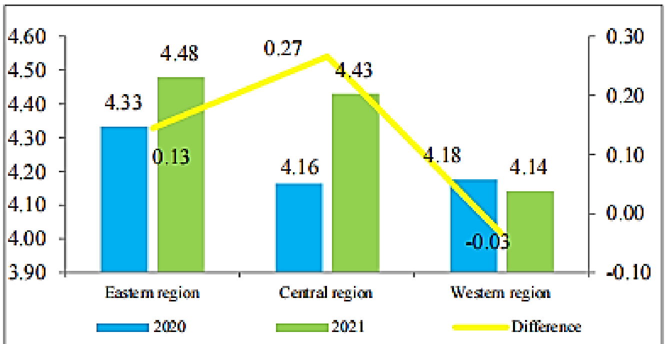


Figure 2-2-2 Comparison of Evaluation on Life-support Service Environment in Different Regions

(III) Sino-foreign joint ventures and cooperative enterprises gave high evaluations, and enterprises of other ownerships gave low ones

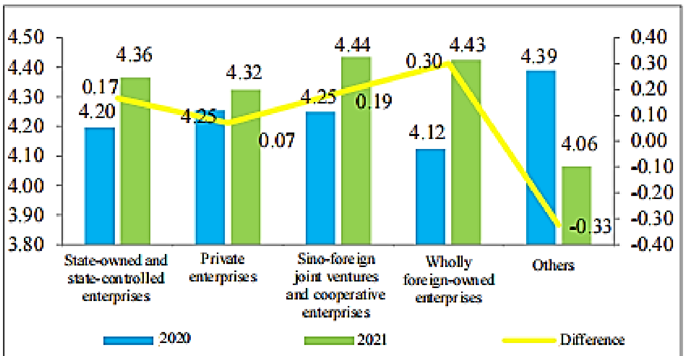


Figure 2-2-3 Evaluation on Life-support Service Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, the Sino-foreign joint ventures and cooperative enterprises gave the highest score (4.44), 0.19 higher than the previous year; the wholly foreign-owned enterprises gave a high score (4.43), 0.30 higher than the previous year; the enterprises of other ownerships gave the lowest score (4.06), 0.33 lower than the previous year; the state-owned enterprises and private enterprises gave the moderate scores (4.36 and 4.32), 0.17 and 0.07 higher than the previous year respectively.

(IV) High evaluation on traditional manufacturing industry; low on construction industry

The traditional manufacturing industry gave the highest score of 4.37 for life-support service environment, followed by 4.35 of other industries; construction industry gave the lowest score of 4.14; resources industry, high-tech industry and service industry gave the scores of 4.33, 4.28 and 4.25 respectively.

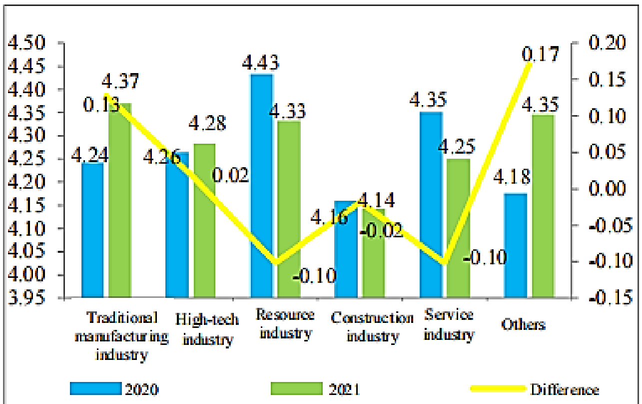


Figure 2-2-4 Comparison of Evaluation on Life-support Service Environment in Different Industries

Compared with 2020, there was little difference in the evaluation on life-support service environment in all industries in 2021. The scores of other industries and traditional manufacturing industry have greatly improved by 0.17 and 0.13 respectively; the score of the high-tech industry increased slightly (by 0.02); the scores of the construction industry, resource industry and service industry have declined by 0.02, 0.10 and 0.10 respectively.

III. Policy and Government Administration: Highest Evaluation on Official Integrity; Negative Growth of Evaluation in Multiple Industries

The policy and government administration environment index can be sub-divided into four second-level indexes, i.e., intensity of policy implementation, policy equity, efficiency of government services and official integrity. In 2021, the surveyed enterprises had a moderate evaluation on policy and government administration environment, with a score of 4.45, which was 0.02 higher than that of 2020 and ranked 5th among the 12 first-level indexes.

（I）Highest evaluation on official integrity, low evaluation on policy equity

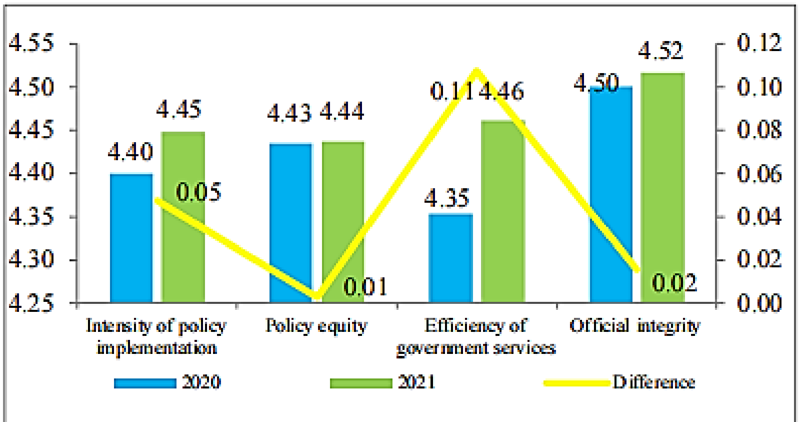


Figure 2-3-1 Evaluation on the Sub-divided Indexes of Policy and Government Administration Environment

Among the sub-divided indexes, the official integrity had the highest score of 4.52, reaching the "excellent" level, followed by efficiency of government services (4.46). The evaluation scores on intensity of policy implementation and policy equity were 4.45 and 4.44 respectively.

Compared with 2020, the evaluation score on index of efficiency of government services in 2021 has improved the most (by 0.11), followed by the intensity of policy implementation (by 0.05); the evaluation scores on official integrity and policy equity have improved by 0.02 and 0.01 respectively.

(II) High evaluations in the eastern region; negative growth of evaluation in the western region

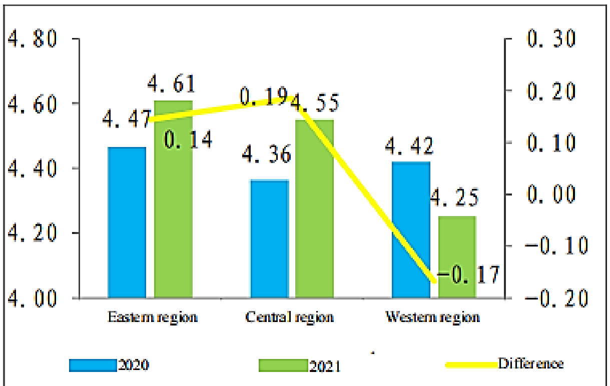


Figure 2-3-2 Evaluations on Policy and Government Administration Environment in Different Regions

The evaluation score on policy and government administration environment in the eastern region was the highest at 4.61, 0.14 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.55, an increase of 0.19; the western region saw a negative growth, decreasing by 0.17 from the previous year to 4.25.

(III) The Sino-foreign joint ventures and cooperative enterprises gave high evaluation, with negative growth of evaluation from enterprises of other ownerships

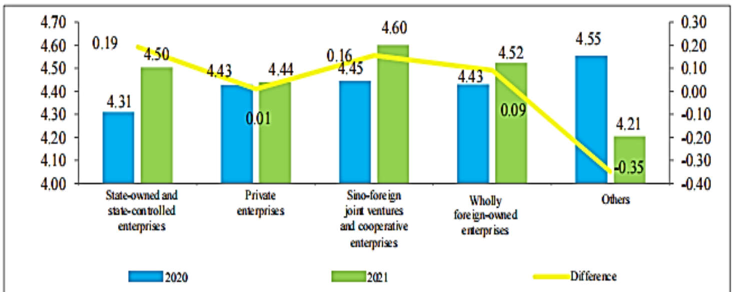


Figure 2-3-3 Evaluation on Policy and Government Administration Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, the Sino-foreign joint ventures and cooperative enterprises gave the highest evaluation score (4.60), 0.16 higher than the previous year; the wholly foreign-owned enterprises and state-owned enterprises gave relatively higher scores (4.52 and 4.50), 0.09 and 0.19 higher than the previous year respectively; the enterprises of other ownerships gave the lowest score (4.21), 0.35 lower than the previous year; the private enterprises gave the moderate score (4.44), 0.01 higher than the previous year.

(IV) High evaluation from traditional manufacturing industry; negative growth of evaluation in multiple industries

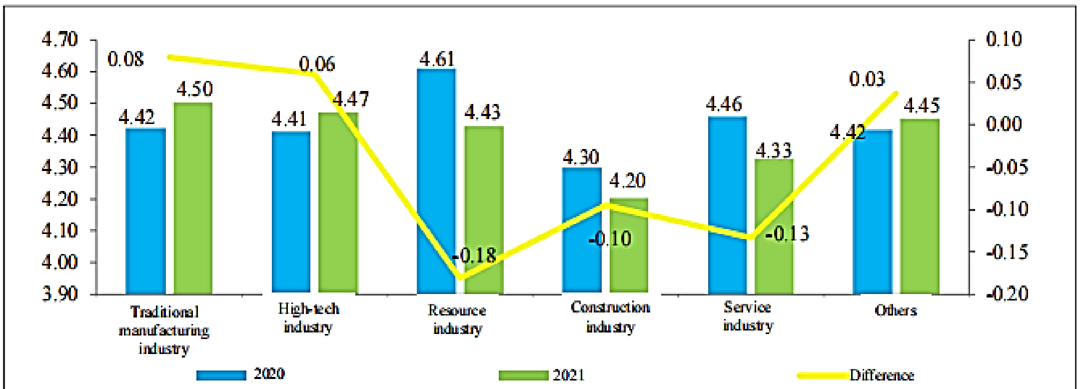


Figure 2-3-4 Comparison Diagram of Annual Evaluation on Policy and Government Administration Environment in Different Industries

The traditional manufacturing industry gave the highest evaluation score of 4.50 for policy and government administration environment, followed by 4.47 of high-tech industry; construction industry gave the lowest score of 4.20; other industries, resource industry and service industry gave the moderate scores of 4.45, 4.43 and 4.33 respectively.

Compared with 2020, in 2021, the evaluation scores from traditional manufacturing industry and high-tech industry have increased by 0.08 and 0.06 respectively; that of other industries increased by 0.03; that of resources industry, service industry and construction industry declined by 0.18, 0.13 and 0.10 respectively.

IV. Social Credit: Evaluation on Indexes Ranked Second, with High Evaluation on Social Credit Index

Social credit environment is sub-divided into three second-level indexes, i.e. social credit, construction of credit system, construction of punishment and reward mechanism. In 2021, the surveyed enterprises gave a good overall evaluation score on social credit environment (4.51), which was higher than that of comprehensive evaluation on China's business environment and ranked 2nd among the 12 first-level indexes.

(I) Evaluation on social credit was high; construction of punishment and reward mechanism needed to be strengthened

Among the sub-divided indexes, the social credit had the highest score (4.53), followed by construction of credit system (4.52), both reached excellent level; while construction of punishment and reward mechanism had a lower score of 4.47.

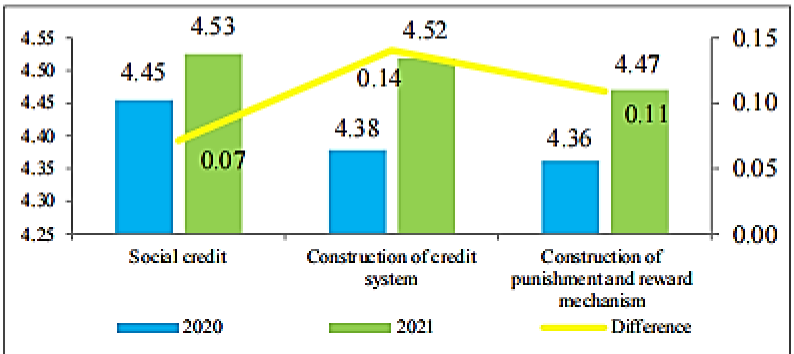


Figure 2-4-1 Evaluation on the Sub-divided Indexes of Social Credit Environment

Compared with 2020, the evaluation on index of construction of credit system in 2021 has improved the most (by 0.14), followed by the construction of punishment and reward mechanism (by 0.11) and social credit (by 0.07).

(II) Higher evaluations in the eastern and central regions; negative growth of evaluation in the western region

The evaluation score on social credit environment in the eastern region was the highest at 4.67, 0.24 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.58, an increase of 0.26; the western

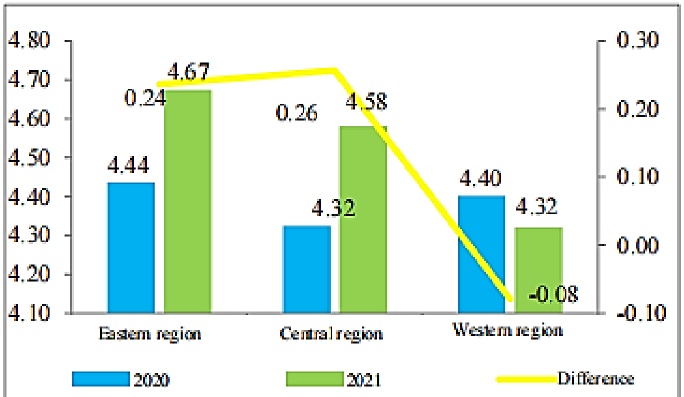


Figure 2-4-2 Comparison of Evaluation on Social Credit Environment in Different Regions

region saw a negative growth, decreasing by 0.08 from the previous year to 4.32.

(III) Sino-foreign joint ventures and cooperative enterprises gave highest evaluation, and private enterprises gave moderate ones

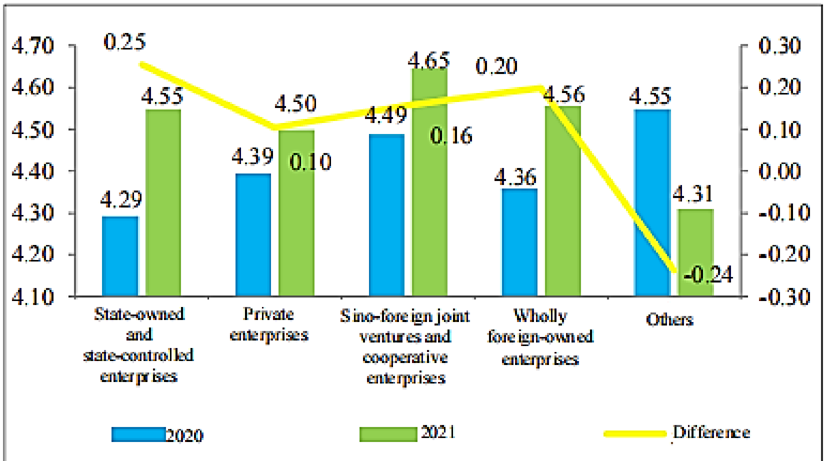


Figure 2-4-3 Comparison of Evaluation on Social Credit Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, the Sino-foreign joint ventures and cooperative enterprises gave the highest evaluation score (4.65), 0.16 higher than the previous year; the wholly foreign-owned enterprises and state-owned enterprises gave relatively higher scores (4.56 and 4.55), 0.20 and 0.25 higher than the previous year respectively; the enterprises of other ownerships gave the lowest score (4.31), 0.24 lower than the previous year; the private enterprises gave the moderate score (4.50), 0.10 higher than the previous year.

(IV) Higher evaluation in high-tech industry; negative growth of evaluation in two industries

The traditional manufacturing industry gave the highest evaluation for social credit environment with a score of 4.55, followed by other industries and high-tech industry of 4.54 and 4.52 respectively; construction industry gave the lowest score of 4.26; resource industry and service industry gave the scores of 4.46 and 4.35 respectively.

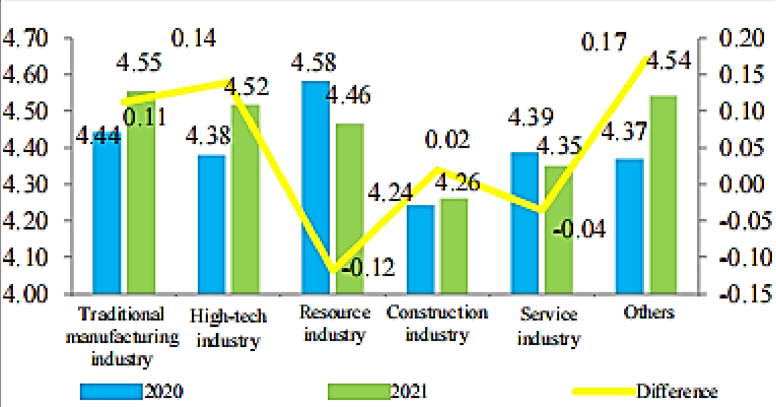


Figure 2-4-4 Comparison of Evaluation on Social Credit Environment in Different Industries

Compared with 2020, in 2021, the scores of other industries, high-tech industry and traditional manufacturing industry have greatly increased by 0.17, 0.14 and 0.11 respectively; that of construction industry increased by 0.02; that of resources industry and service industry declined by 0.12 and 0.04 respectively.

V. Fair Competition: High Evaluation on Market Supervision, Negative Growth of Evaluation in Two Industries

Fair competition environment is sub-divided into four second-level indexes, i.e. market supervision, administrative monopoly, government procurement and market access. The surveyed enterprises gave a good overall evaluation score on fair competition environment (4.44), which was higher than the score of comprehensive evaluation on China's business environment and ranked 5th among the 12 first-level indexes.

(I) High evaluation on market supervision, low on administrative monopoly

Among the sub-divided indexes, market supervision had the highest score of 4.48; market access had a moderate score of 4.45; the score of both government procurement and administrative monopoly was 4.43.

Compared with 2020, the evaluation score on index of government procurement has improved the most (by 0.07), followed by the administrative monopoly and market access (by 0.06 and 0.05 respectively); the evaluation score on market supervision has improved by 0.04.

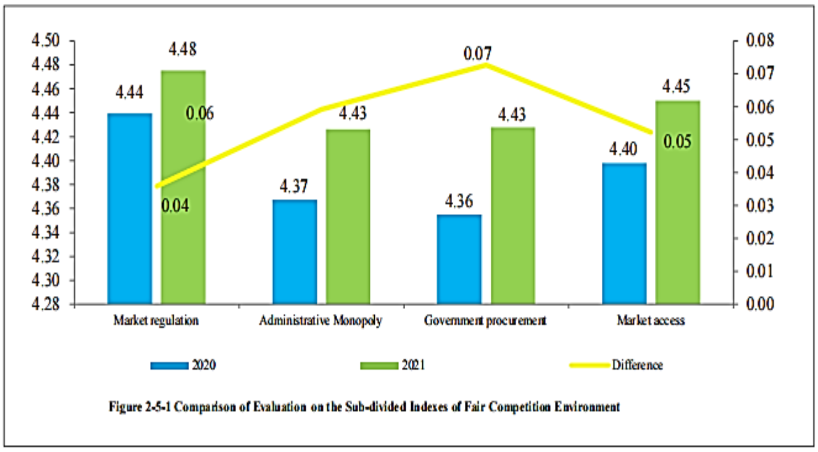


Figure 2-5-1 Comparison of Evaluation on the Sub-divided Indexes of Fair Competition Environment

(II) High evaluations in the eastern region; enhanced evaluation in the western region

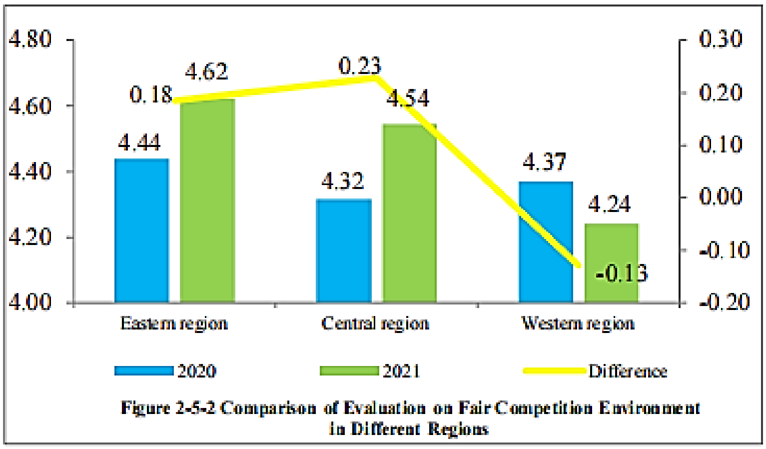


Figure 2-5-2 Comparison of Evaluation on Fair Competition Environment in Different Regions

The evaluation on fair competition environment in the eastern region was the highest with the score of 4.62, 0.18 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.54, an increase of 0.23; the western region saw a negative growth, decreasing by 0.13 from the previous year to 4.24.

(III) State-owned enterprises gave high evaluation, with negative growth of evaluation from enterprises of other ownerships

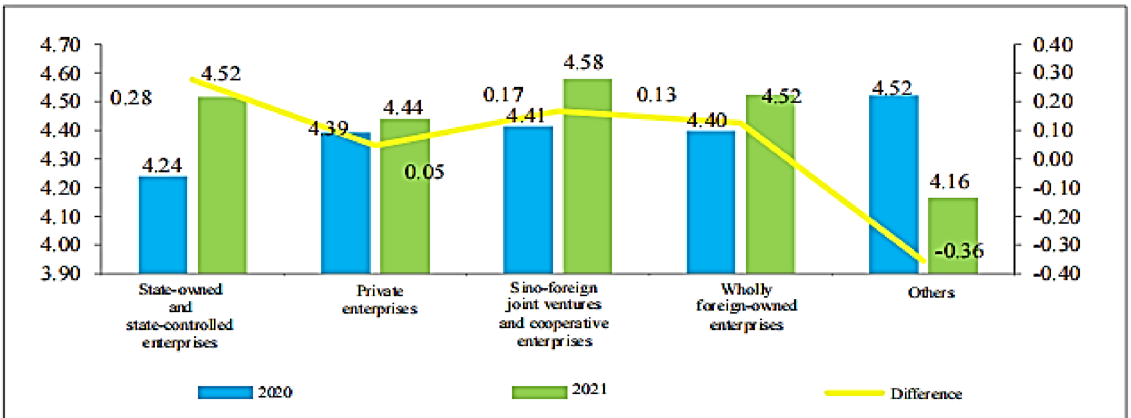


Figure 2-5-3 Comparison Diagram of Annual Evaluation on Fair Competition Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, Sino-foreign joint ventures and cooperative enterprises gave the highest score (4.58), 0.17 higher than the previous year; the wholly foreign-owned enterprises and state-owned enterprises gave relatively higher scores (both 4.52), 0.13 and 0.28 higher than the previous year respectively; the enterprises of other ownerships gave the lowest score (4.16), 0.36 lower than the previous year; the private enterprises gave the moderate score (4.44), 0.05 higher than the previous year.

(IV) Higher evaluation in traditional manufacturing industry; with negative growth of evaluation from resources industry and service industry

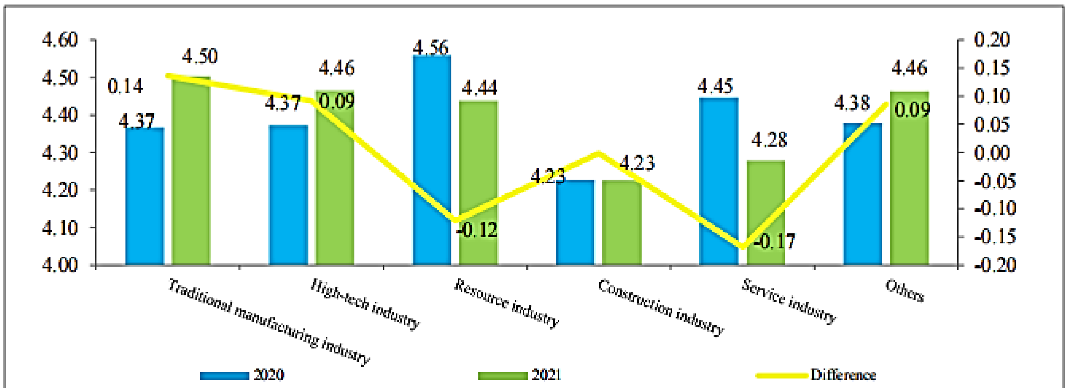


Figure 2-5-4 Comparison Diagram of Annual Evaluation on Fair Competition Environment in Different Industries

The traditional manufacturing industry gave the highest score of 4.50 for fair competition environment, followed by 4.46 of other industries and high-tech industry; construction industry gave the lowest score of 4.23; resources industry and service industry gave the scores of 4.44 and 4.28 respectively.

Compared with 2020, in 2021, the scores of traditional manufacturing industry, other industries and high-tech industry have greatly increased by 0.14, 0.09 and 0.09 respectively; that of construction industry remained unchanged; that of resource industry and service industry declined by 0.12 and 0.17 respectively.

VI. Rule of Law: Overall Evaluation Ranked Second, with Similar Scores in Sub-divided Indexes

The rule of law is a new index in 2021 and can be sub-divided into five second-level indexes, i.e. legal supervision, government administration according to law, case conclusion by court and arbitrator on schedule, enforcement of court decisions and arbitral awards, and intellectual property protection. In 2021, the overall evaluation on rule of law was good with a total score of 4.51, which was higher than the score of comprehensive evaluation on China's business environment and ranked 2nd among the 12 first-level indexes.

(I) Similar evaluation on second-level indexes, high evaluation on government administration according to law and legal supervision

In 2021, the range difference of the five second-level indexes of rule of law was small, only 0.04. The scores of government administration according to law and legal supervision were high at 4.53, followed by intellectual property protection at 4.50; the scores of case conclusion by court and arbitrator on schedule and enforcement of court decisions and arbitral awards were low at 4.49.

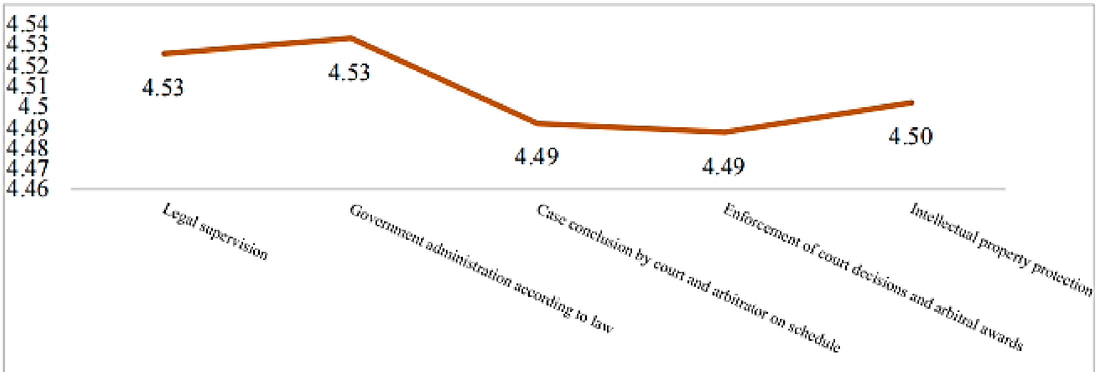


Figure 2-6-1 Evaluation on the Sub-divided Indexes of rule of law

(II) The evaluation in the eastern and central regions was significantly higher than that in the western region

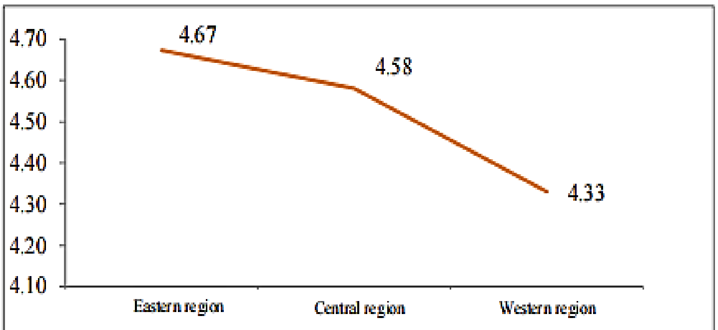


Figure 2-6-2 Evaluation on rule of law in Different Regions

The evaluation on rule of law in the eastern region was the highest at 4.67; the evaluation in central region as relatively high at 4.58; the evaluation in western region was the lowest at 4.33.

(III) Sino-foreign joint ventures and cooperative enterprises gave high evaluation scores, and enterprises of other ownerships gave low ones

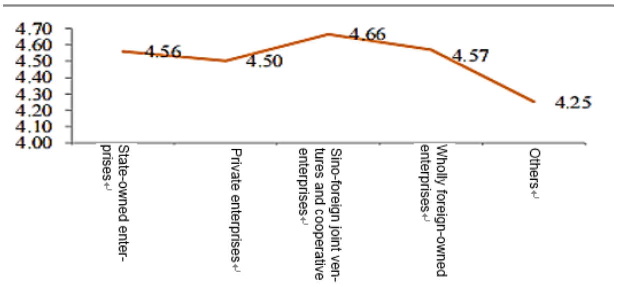


Figure 2-6-3 Evaluation on rule of law of Enterprises of Different Ownerships

From the perspective of different ownerships, the Sino-foreign joint ventures and co-operative enterprises gave the highest score (4.66); the wholly foreign-owned enterprises, state-owned enterprises and private enterprises gave the moderate scores (4.57, 4.56 and 4.50 respectively); the enterprises of other ownerships gave the lowest score (4.25).

(IV) High evaluation in traditional manufacturing industry; low evaluation in construction industry

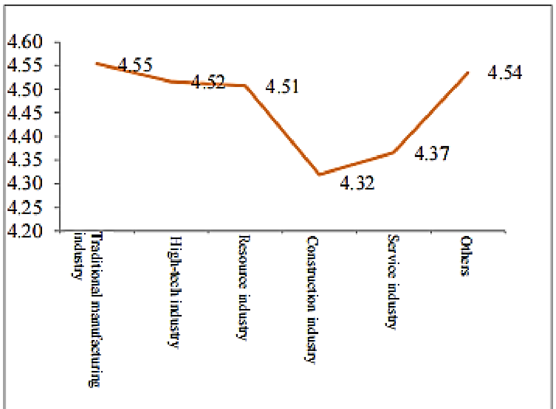


Figure 2-6-4 Comparison Diagram of Annual Evaluation on Rule of Law in Different Industries

The traditional manufacturing industry gave the highest score of 4.55 for rule of law, followed by 4.54 of other industries, 4.52 of high-tech industry, 4.51 of resources industry; construction industry gave the lowest score of 4.32; service industry gave the moderate score of 4.37.

VII. Technological Innovation: Similar Evaluation on Second-level Indexes, Higher Evaluation from State-owned Enterprises

Technological innovation environment is sub-divided into five second-level indexes: implementation of R&D tax credit policy, IP collateralization, industry-university-research combination, business incubation service and public service platform construction. The score of technological innovation environment was 4.36 and ranked 7th among the 12 first-level indexes.

(I) High evaluation on the implementation of R&D tax credit policy, low evaluation on industry-university-research combination and business incubation service

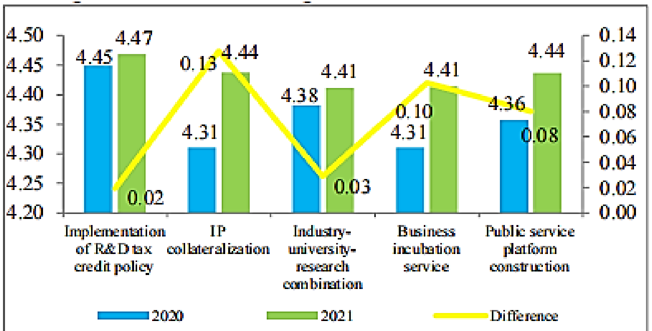


Figure 2-7-1 Comparison Diagram of Annual Evaluation on Sub-divided Indexes of Technological Innovation Environment

The scores of the five second-level indexes of technological innovation environment were small, with the range difference of only 0.06. The implementation of R&D tax credit policy scored the highest at 4.47, followed by IP collateralization and public service platform construction at both 4.44; while industry-university-research combination and business incubation service scored lower at both 4.41.

Compared with 2020, the evaluation on index of IP collateralization in 2021 has improved the most (by 0.13), followed by business incubation service and public service platform construction (by 0.10 and 0.08 respectively); the evaluation on industry-university-research combination and implementation of R&D tax credit policy have improved by 0.03 and 0.02 respectively.

(II) High evaluations in the eastern and central regions; negative growth of evaluation in the western region

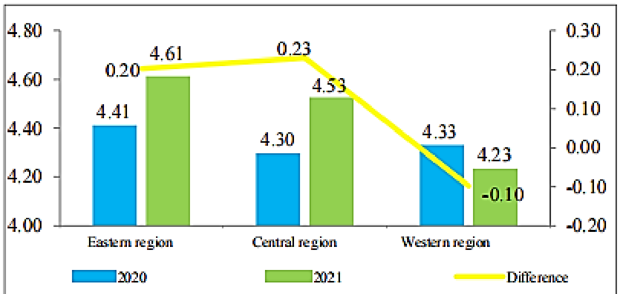


Figure 2-7-2 Comparison of Evaluation on Technological Innovation Environment in Different Regions

The evaluation score on technological innovation environment in the eastern region was the highest at 4.61, 0.20 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.53, an increase of 0.23; the western region saw a negative growth, decreasing by 0.10 from the previous year to 4.23.

(III) Sino-foreign joint ventures and cooperative enterprises gave the highest scores, and enterprises of other ownerships gave low scores

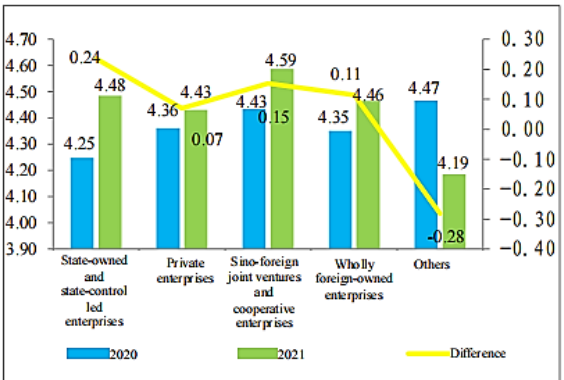


Figure 2-7-3 Comparison Diagram of Annual Evaluation on Technological Innovation Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, the Sino-foreign joint ventures and cooperative enterprises gave the highest score (4.59), 0.15 higher than the previous year; the state-owned enterprises and wholly foreign-owned enterprises gave the high scores (4.48 and 4.46), 0.24 and 0.11 higher than the previous year respectively; the enterprises of other ownerships gave the lowest score (4.19), 0.28 lower than the previous year; the private enterprises gave the moderate score (4.43), 0.07 higher than the previous year.

(IV) High evaluation in traditional manufacturing industry; lower evaluation in three industries

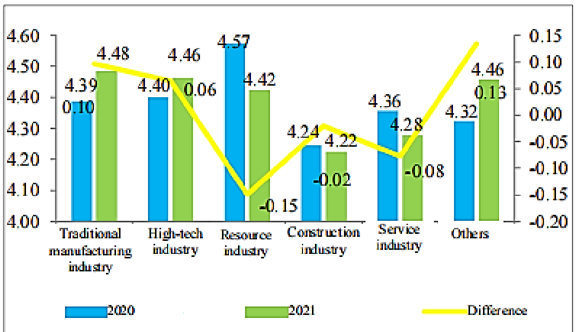


Figure 2-7-4 Comparison Diagram of Annual Evaluation on Technological Innovation Environment in Different Industries

The traditional manufacturing industry gave the highest score of 4.48 for technological innovation environment, followed by 4.46 of other industries, 4.46 of high-tech industry, 4.42 of resources industry; construction industry and service industry gave the lower scores of 4.22 and 4.28 respectively.

Compared with 2020, in 2021, the scores of other industries, traditional manufacturing industry and high-tech industry have greatly increased by 0.13, 0.10 and 0.06 respectively; that of resources industry, service industry and construction industry have declined by 0.15, 0.08 and 0.02 respectively.

VIII. Human Resources: Evaluation Ranked Last, with Low Evaluation on Availability of Social Specialized Talents

Human resources environment is sub-divided into four second-level indexes: availability of skilled labor, availability of middle and senior managers, availability of innovative and entrepreneurial talents, and availability of social specialized talents, in which, the availability of social specialized talents is a new index in 2021. In 2021, the evaluation on human resources environment was only 4.04 and ranked last among the 12 first-level indexes.

(I) High evaluation on availability of skilled labor, low evaluation on availability of social specialized talents

From the perspective of sub-divided indexes, the score on availability of skilled labor was higher at 4.11; the scores on availability of middle and senior managers and availability of innovative and entrepreneurial talents

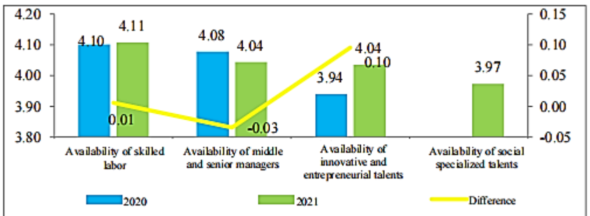


Figure 2-8-1 Comparison Diagram of Annual Evaluation on Sub-divided Indexes of Human Resources Environment

were relatively low at both 4.04; the score on availability of social specialized talents was the lowest at only 3.97.

Compared with 2020, the evaluation on index of availability of innovative and entrepreneurial talents in 2021 has improved the most (by 0.10 points), followed by the availability of skilled labor (by 0.01 points); the evaluation on availability of middle and senior managers has declined by 0.03.

In 2021, China's labor cost accounted for 26.27% of the total cost, decreasing by 1.73% from 2020, and the annual average of labor cost increased by 8%, slightly higher than that of 2020 (7.9%).

(II) High evaluation in the central region; less than a score of 4 in the western region

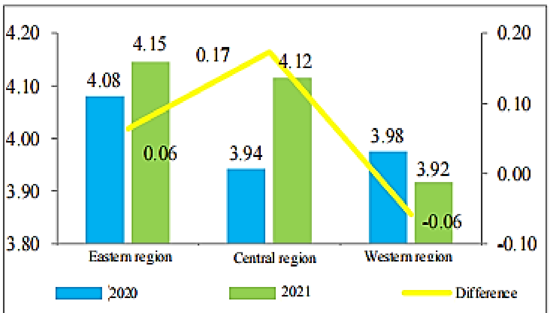


Figure 2-8-2 Comparison of Evaluation on Human Resources Environment in Different Regions

The evaluation on human resources environment in the eastern region was the highest at 4.15, 0.06 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.12 , an increase of 0.17; the western region saw a negative growth, decreasing by 0.06 from the previous year to 3.92.

(III) Sate-owned enterprises gave high evaluation scores, and Sino-foreign joint ventures and cooperative enterprises gave low ones

From the perspective of different ownerships, the state-owned enterprises gave the highest score (4.17), 0.23 higher than the previous year; the wholly foreign-owned enterprises gave relatively higher score (4.12), 0.18 higher than the previous year respectively; the Sino-foreign joint ventures and cooperative enterprises gave the lowest score (3.97), 0.14 lower than the previous year; enterprises of other ownerships and private enterprises gave the moderate score (4.02), 0.19 lower than the previous year; private enterprises gave the moderate score (4.02 points), 0.01 higher than the previous year.

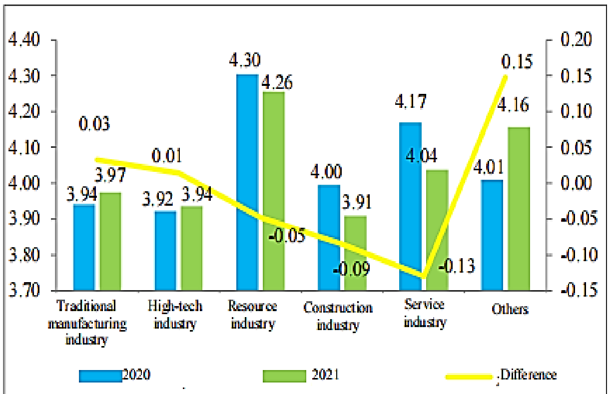


Figure 2-8-4 Comparison Diagram of Annual Evaluation on Human Resources Environment in Different Industries

(IV) Highest evaluation in resource industry; low evaluation in construction industry

The resources industry gave the highest score of 4.26 for human resources environment, followed by 4.16 of other industries; construction industry gave the lowest score of 3.91; service industry, traditional manufacturing industry and high-tech industry gave the moderate scores of 4.04, 3.97 and 3.94 respectively.

Compared with 2020, in 2021, the score of other industries has greatly increased by 0.15 points; that of traditional manufacturing industry and high-tech industry increased by 0.03 and 0.01 points respectively; that

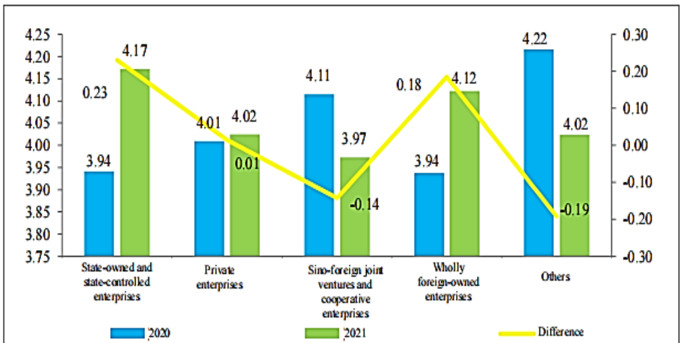


Figure 2-8-3 Comparison Diagram of Annual Evaluation on Human Resources Environment of Enterprises of Different Ownerships

of service industry, construction industry and resource industry declined by 0.13, 0.09 and 0.05 respectively.

IX. Financial Service: The Index Ranked Second from the Bottom, with Slowed Annual Increase in Financing Costs

Financial service environment is sub-divided into two second-level indexes: financing convenience and diversity of financing channels. In recent years, the financial service environment has improved; however, the overall situation is still not optimistic, and there are large differences in the evaluation among the eastern, central and western regions. In 2021, the surveyed enterprises gave a low overall evaluation on financial service environment, with a score of 4.17, which ranked 11th among the 12 first-level indexes and far below the score of overall evaluation of the national business environment (4.38).

(I) The evaluation on second-level indexes were low, and the difference between the indexes was slight

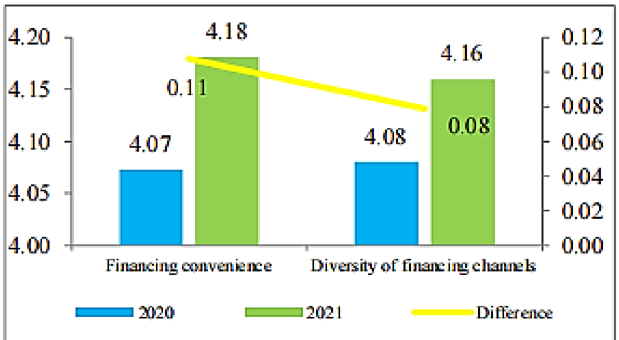


Figure 2-9-1 Comparison Diagram of Annual Evaluation on Sub-divided Indexes of Financial Service Environment

Among the sub-divided indexes, the financing convenience score was 4.18, and the diversity of financing channels was 4.16. The difference between the two was only 0.02. Compared with 2020, the two indexes have significantly improved in 2021, with financing convenience increasing by 0.11 and the diversity of financing channels increasing by 0.08.

The financing cost rate (percentage of financing cost in total cost) in 2021 was 13.95%, slightly higher than that of the previous year (13.05%).

The annual average of financing cost has increased by 8%, slightly lower than that of the previous year (9.94%).

(II) High evaluation in the eastern and central regions; negative growth of evaluation in the western region

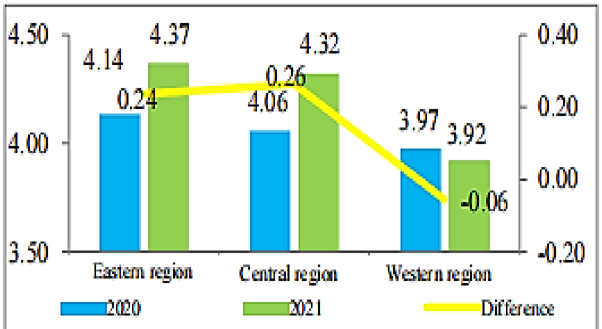


Figure 2-9-2 Comparison of Evaluation on Financial Service Environment in Different Regions

The evaluation score on financial service environment in the eastern region was the highest at 4.37, 0.24 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.32 (an increase of 0.26); the western region saw a negative growth, decreasing by 0.06 from the previous year to 3.92.

(III) The wholly foreign-owned enterprises gave high evaluation scores, and enterprises of other ownerships gave low ones

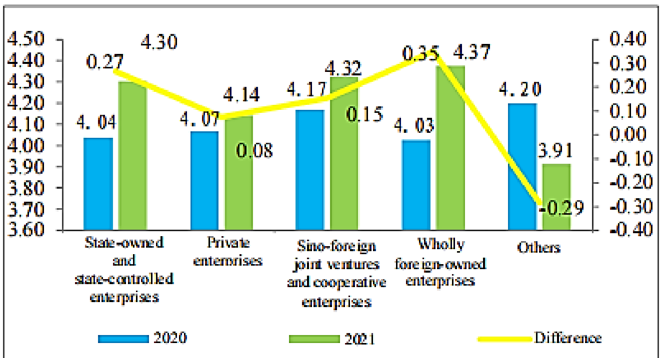


Figure 2-9-3 Comparison Diagram of Annual Evaluation on Financial Service Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, the wholly foreign-owned enterprises gave the highest score (4.37), 0.35 higher than the previous year; the Sino-foreign joint ventures and cooperative enterprises and state-owned enterprises gave the high scores (4.32 and 4.30), 0.15 and 0.27 higher than the previous year respectively; the enterprises of other ownerships gave the lowest score (3.91), 0.29 lower than the previous year; the private enterprises gave the moderate score (4.41), 0.08 higher than the previous year.

(IV) Higher evaluation in high-tech industry; high evaluation but big drop in resources industry

The resources industry gave the highest score of 4.24 for financial service environment, followed by other industries and traditional manufacturing industry of both 4.21; construction industry gave the lowest score of 3.94; high-tech industry and service industry gave the moderate scores of 4.15 and 4.05 respectively.

Compared with 2020, in 2021, the scores of high-tech industry, other industries and traditional manufacturing industry have greatly increased by 0.14, 0.12 and 0.11 points respectively; that of construction industry increased by 0.05 points; that of service industry and resource industry declined by 0.01 and 0.06 respectively.

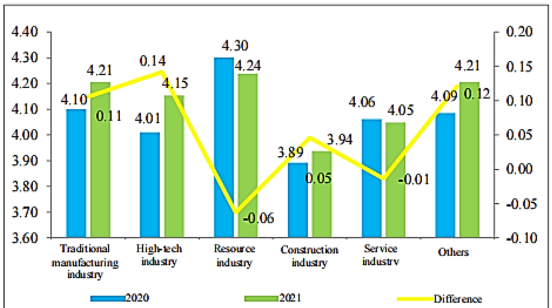


Figure 2-9-4 Comparison Diagram of Annual Evaluation on Financial Service Environment in Different Industries

X. Fiscal and Tax Service: The Highest Score of Overall Evaluation, with Decrease in Evaluation on Sub-divided Indexes

Fiscal and tax service environment is sub-divided into two second-level indexes: standardization of fiscal and tax law enforcement, and processing time for tax refund. In 2021, the enterprises gave the highest overall evaluation on fiscal and tax service environment, with a score of 4.52, which reached excellent level and ranked 1st among the 12 first-level indexes.

(I) All the sub-divided indexes are excellent but lower than that of the previous year

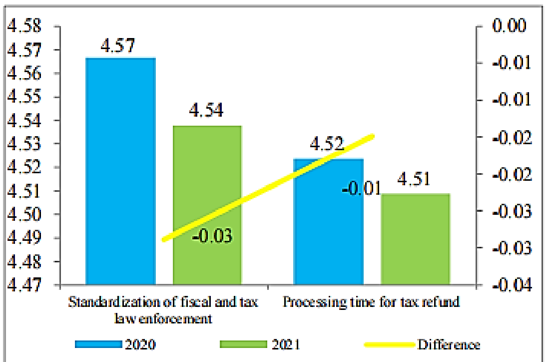


Figure 2-10-1 Comparison Diagram of Annual Evaluation on Sub-divided Indexes of Fiscal and Tax Service Environment

In terms of sub-divided indexes, the scores on standardization of fiscal and tax law enforcement and processing time for tax refund were 4.54 and 4.51 respectively.

Compared with 2020, the evaluation on the two indexes has declined in 2021, with the standardization of fiscal and tax law enforcement declining by 0.03, and the processing time for tax refund declining by 0.01.

Table 2-10-1 Comparison of Enterprises' Evaluation on Indexes of Fiscal and Tax Service Environment

Item (unit)	**2020**	**2021**
Number of tax payments (time)	15.83	12.55
Tax payment time (hour)	12.62	7.25
Time of receipt of export tax refund (working day)	11.79	14.18
Total fee rate (% of fee to profit)	21.96	15.46
Total tax rate (% of tax to profit)	34.15	24.84

Specifically, the average number of tax payments decreased from 15.83 to 12.55 times; the tax payment time reduced from 12.62 to 7.25 hours; the time of receipt of export tax refund increased from 11.79 to 14.18 working days; the total fee rate dropped from 21.96% to 15.46%; the total tax rate dropped from 34.15% to 24.84%.

(II) Higher evaluation in the central region; lower evaluation in the western region

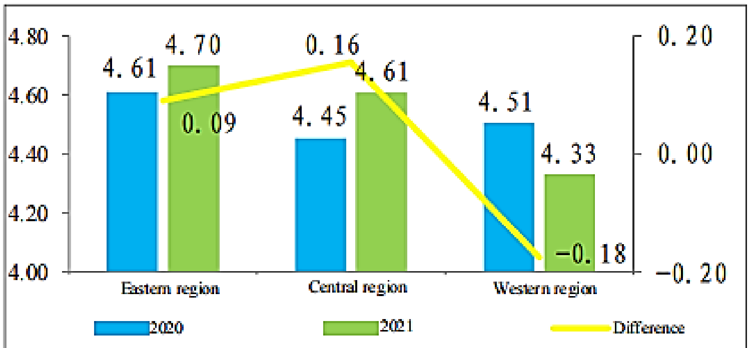


Figure 2-10-2 Comparison of Evaluation on Fiscal and Tax Service Environment in Different Regions

The evaluation on fiscal and tax service environment in the eastern region was the highest at 4.70, 0.09 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.61 (an increase of 0.16); the western region saw a negative growth, decreasing by 0.18 from the previous year to 4.33.

(III) The wholly foreign-owned enterprises gave higher evaluation scores, with negative growth of evaluation from private enterprises and enterprises of other ownerships

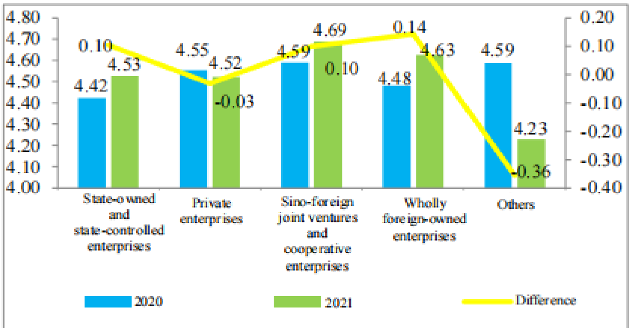


Figure 2-10-3 Comparison Diagram of Annual Evaluation on Fiscal and Tax Service Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, the Sino-foreign joint ventures and cooperative enterprises gave the highest evaluation score (4.69), 0.10 higher than the previous year; the wholly foreign-owned enterprises and state-owned enterprises gave the high scores (4.63 and 4.53), 0.14 and 0.10 higher than the previous year respectively; the enterprises of other ownerships gave the lowest score (4.23), 0.36 lower than the previous year; the private enterprises gave the moderate score (4.52), 0.03 lower than the previous year.

(IV) High evaluation in traditional manufacturing industry; low evaluation in construction industry

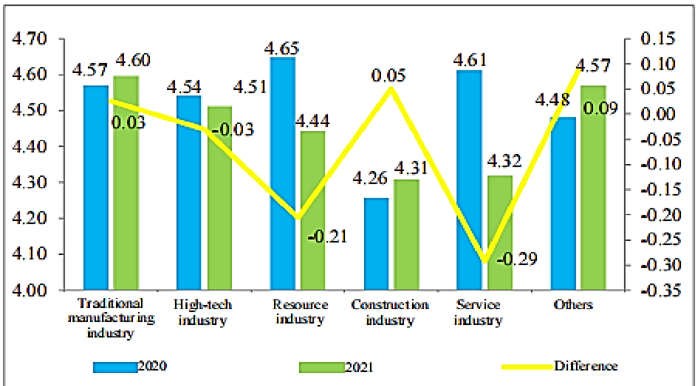


Figure 2-10-4 Comparison Diagram of Annual Evaluation on Fiscal and Tax Service Environment in Different Industries

The traditional manufacturing industry gave the highest score of 4.60 for fiscal and tax service environment, followed 4.57 of other industries and 4.51 of high-tech industry; construction industry and service industry gave the low scores of 4.31 and 4.32 respectively; resources industry gave the moderate score of 4.44.

Compared with 2020, in 2021, the scores of other industries and construction industry increased by 0.09 and 0.05 respectively; that of traditional manufacturing industry increased by 0.03; that of service industry, resources industry and high-tech industry declined by 0.29, 0.21 and 0.03 respectively.

XI. Customs Service: The Evaluation Left Much Room to Improve, with Negative Growth of Evaluation in Service Industry

The customs service environment is sub-divided into three second-level indexes: goods clearance, inspection and quarantine, and personnel entry and exit. In 2021, the surveyed enterprises gave a high evaluation on customs service environment, with a score of 4.51, which ranked 2nd among the 12 first-level indexes.

（I） All the second-level indexes were in the excellent category, and the evaluation continued to rise

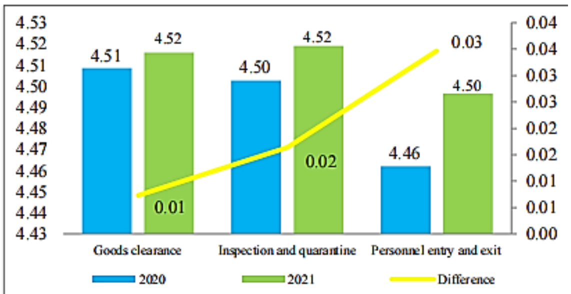


Figure 2-11-1 Comparison Diagram of Annual Evaluation on Sub-divided Indexes of Customs Service Environment

From the perspective of the sub-divided indexes, the scores on goods clearance and inspection and quarantine were high at both 4.52; the score on personnel entry and exit was slightly lower at 4.50. Compared with 2020, the evaluation on each sub-divided index has improved in 2021. The evaluation on personnel entry and exit has increased by 0.03; the evaluations on inspection and quarantine and goods clearance increased by 0.02 and 0.01 respectively.

(II) Highest evaluation in the eastern region; higher evaluation in the central region

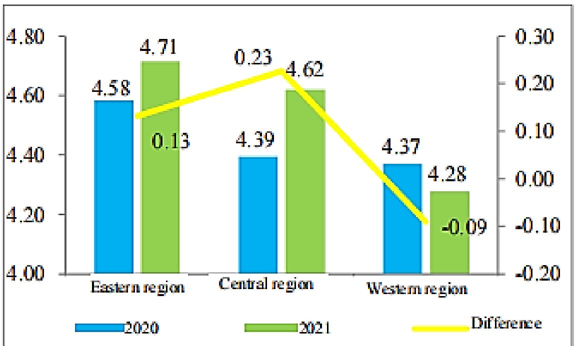


Figure 2-11-2 Comparison of Evaluation on Customs Service Environment in Different Regions

The evaluation on customs service environment in the eastern region was the highest at 4.71, 0.13 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.62 (an increase of 0.23); the western region saw a negative growth, decreasing by 0.09 from the previous year to 4.28.

(III) The wholly foreign-owned enterprises and state-owned enterprises gave higher evaluation, with negative growth of evaluation from enterprises of other ownerships

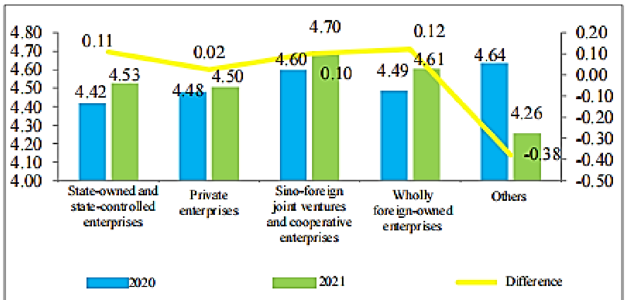


Figure 2-11-3 Comparison Diagram of Annual Evaluation on Customs Service Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, the Sino-foreign joint ventures and co-operative enterprises gave the highest score (4.70), 0.10 higher than the previous year; the wholly foreign-owned enterprises and state-owned enterprises gave the high scores (4.61 and 4.53), 0.12 and 0.11 higher than the previous year respectively; the enterprises of other ownerships gave the lowest score (4.26), 0.38 lower than the previous year; the private enterprises gave the moderate score (4.50), 0.02 higher than the previous year.

(IV) High evaluation in traditional manufacturing industries; negative growth of evaluation in service industry and resources industry

The traditional manufacturing industry gave the highest evaluation score of 4.61 for customs service environment, followed by 4.51 of other industries and 4.50 of high-tech industry; construction industry gave the lowest score of 4.21; resources industry and service industry gave the moderate scores of 4.49 and 4.32 respectively.

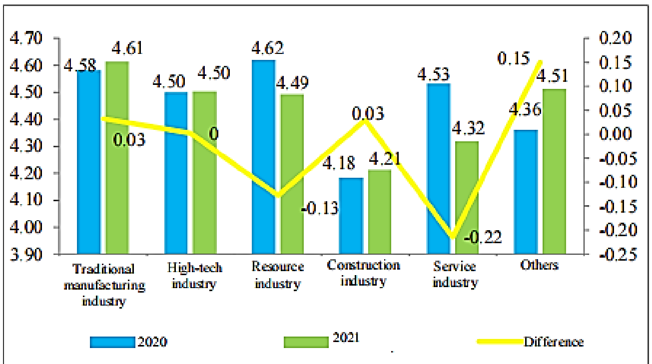


Figure 2-11-4 Comparison Diagram of Annual Evaluation on Customs Service Environment in Different Industries

Compared with 2020, in 2021, the scores of other industries have increased by 0.15; that of construction industry and traditional manufacturing industry increased by both 0.03; that of high-tech industry remained unchanged; that of service industry and resource industry declined by 0.22 and 0.13 respectively.

XII. Enterprise Establishment and Withdrawal: High Evaluation on Environmental Protection Procedure, and Higher Evaluation in Construction Industry

The enterprise establishment and withdrawal environment is sub-divided into three second-level indexes: land acquisition, environmental protection procedure and bankruptcy procedure. In 2021, the surveyed enterprises evaluated the enterprise establishment and withdrawal environment at a score of 4.36, which ranked 8th among the 12 indexes.

(I) High evaluation on environmental protection procedure, low evaluation on land acquisition

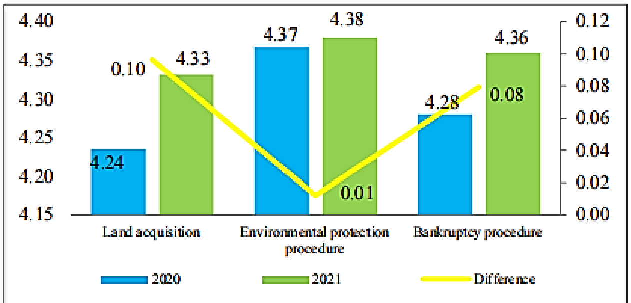


Figure 2-12-1 Comparison Diagram of Annual Evaluation on Sub-divided Indexes of Enterprise Establishment and Withdrawal Environment

From the perspective of the sub-divided indexes, the score on environmental protection procedure was the highest at 4.38; the score on land acquisition was the lowest at 4.33; the rating on bankruptcy procedure was moderate at 4.38.

Compared with 2020, the evaluations on all sub-divided indexes have improved in 2021, with land acquisition improving the most (by 0.10), followed by bankruptcy procedure (by 0.08); and evaluation on environmental protection procedure slightly improved (by 0.01).

Table 2-12-1 Sub-divided Indexes of Enterprise Establishment and Withdrawal Environment

Item		Mean		Trend
		2020	2021	
Starting a business	Procedure (item)	4.33	26.37	↑
	Time (working day)	6.97	16.88	↑
	Rate (% per capita income)	12.21	12.96	↑
	Procedure (item)	4.61	4.75	↑

Construction permit	Time limit for handling (working day)	7.59	12.70	↑
	Handling cost rate (%)	6.86	9.98	↑
Access to electricity	Handling link (unit)	3.71	2.62	↓
	Application material (item)	3.76	2.89	↓
	Time limit for handling (working day)	6.77	8.10	↑
Report for installation of water and gas	Handling link (unit)	3.27	2.43	↓
	Application material (item)	3.58	2.81	↓
	Time limit for handling (working day)	5.39	7.09	↑
Registration of property rights	Procedure (item)	4.06	3.70	↓
	Time limit (working day)	6.42	10.93	↑
	Rate (% of property value)	14.65	7.15	↓
Access to credit	Handling link (unit)	4.93	3.60	↓
	Application material (item)	5.27	4.77	↓
	Time limit for handling (working day)	9.25	12.16	↑
Enterprise cancellation	Material (item)	4.23	4.37	↓
	Cost (CNY)	340.38	1740576	↑
	Procedure (unit)	4.18	3.38	↓
	Time limit (working day)	9.77	14.57	↑
Bankruptcy litigation expense ratio (%)		4.55	5.67	↑
Liquidation recovery rate (%)		11.09	14.49	↑

According to the questionnaire survey in 2021, there were 26.37 items, 16.88 working days and 12.96% respectively for the procedures, time and rates to start business; there were 4.75 items, 12.70 working days and 9.98% respectively for the procedures, time limit and rate to handle the construction permit; there were 3.70 items, 10.93 working days and 7.15% respectively for the procedures, time limit and rate of property right registration; there were 3.60 units, 4.77 items and 12.16 working days respectively for the handling links, application materials and handling time limit of access to credit; there were 2.62 units, 2.89 items and 8.10 working days respectively for the handling links, application materials and handling time limit of access to electricity; there were 2.43 units, 2.81 items and 7.09 working days respectively for the handling links, application materials and handling time limit to report the installation of water and gas; there were 4.37 items, CNY 1740576, 3.38 units and 14.57 working days respectively for the material, cost, procedure and time limit of the enterprise cancellation; with regard to bankruptcy liquidation, the average litigation cost rate was 5.67% and the liquidation recovery rate was 14.49%.

(II) Highest evaluation in the eastern region; with the highest improvement of evaluation in the western region

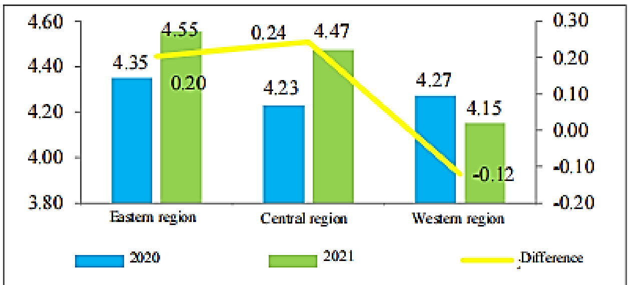


Figure 2-12-2 Comparison of Evaluation on Enterprise Establishment and Withdrawal Environment in Different Regions

The evaluation on enterprise establishment and withdrawal environment in the eastern region was the highest at 4.55, 0.20 higher than that of the previous year; the evaluation in central region has improved the most, with a score of 4.47, an increase of 0.24; the western region saw a negative growth, decreasing by 0.12 from the previous year to 4.15.

(III) Sino-foreign joint ventures and cooperative enterprises gave higher evaluation scores, and state-owned enterprises gave low ones

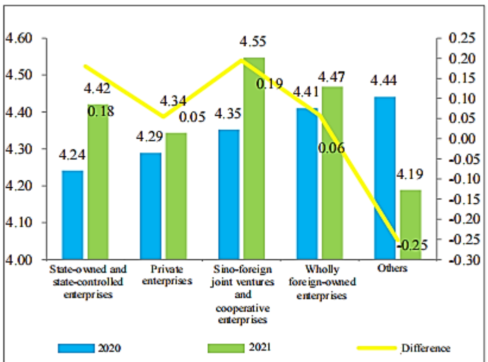


Figure 2-12-3 Comparison Diagram of Annual Evaluation on Enterprise Establishment and Withdrawal Environment of Enterprises of Different Ownerships

From the perspective of different ownerships, the enterprises of other ownerships gave the highest evaluation score (4.44), followed by the wholly foreign-owned enterprises (4.41); the state-owned enterprises gave the lowest score (4.24); Sino-foreign joint ventures and cooperative enterprises and private enterprises gave the moderate scores of 4.35 and 4.29 respectively.

Compared with 2020, in 2021, the score of Sino-foreign joint ventures and cooperative enterprises has improved the most (by 0.19), followed by state-owned and state-controlled enterprises (by 0.18); the scores of wholly foreign-owned enterprises and private enterprises have moderately improved by 0.06 and 0.05 respectively. The score of enterprises of other ownerships showed negative growth, decreasing by 0.25.

(IV) High evaluation in traditional manufacturing industry; low evaluation in construction industry

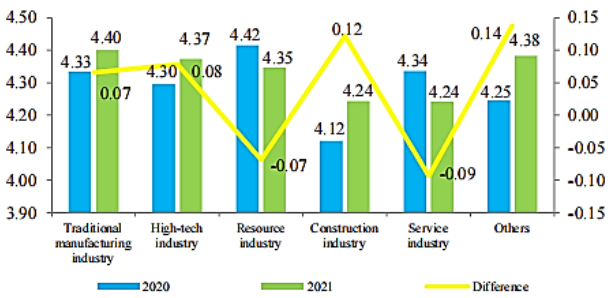


Figure 2-12-4 Comparison Diagram of Annual Evaluation on Establishment and Withdrawal Environment in Different Industries

The traditional manufacturing industry gave the highest score of 4.40 for enterprise establishment and withdrawal environment, followed by 4.38 and 4.37 respectively of other industries and high-tech industry; construction industry and service industry gave the low scores of both 4.24; resources industry gave the moderate score of 4.35.

Compared with 2020, in 2021, the scores of other industries and construction industry have increased by 0.14 and 0.12 respectively; that of high-tech industry and traditional manufacturing industry increased by 0.08 and 0.07 respectively; that of service industry and resource industry declined by 0.09 and 0.07 respectively.

Chapter III Operation and Investment Status of Enterprises

In 2021, the surveyed enterprises continued to be affected by COVID-19, 70% of them were expected to see revenue growth this year. However, due to the impact of rising cost and factors such as fierce market competition, the enterprises whose revenues fluctuated within a small range over the past five years accounted for the largest part.

I. Over 70% of Enterprises Were Affected by COVID-19 to Varying Degrees

（I）70% of the surveyed enterprises were negatively affected by COVID-19

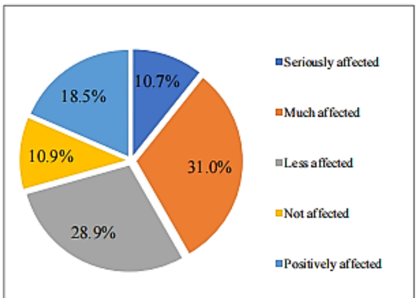


Figure 3-1-1 Evaluation of the COVID-19 Pandemic Impact

70% of the surveyed enterprises were negatively affected by COVID19, among which the enterprises that were "much affected"② took up the highest proportion, accounting for 31%; 28.9% of the surveyed enterprises were "less affected" by COVID-19; 10.7% of the surveyed enterprises were "seriously affected" by COVID-19. In addition, 18.5% of enterprises said they were positively affected by COVID-19; 10.7% reported that they were not affected.

From the perspective of the regions, over 60% of the enterprises in the eastern, central and western regions were affected by COVID-19. The

②Note: "Seriously affected" refers to a decrease of more than 50% in sales revenue in the first half of 2021, "much affected" refers to a decrease of 20%-50%, "less affected" refers to a decrease of 0-20%, and "positively affected" refers to an increase rather than decrease in revenue.

affected enterprises in the eastern region accounted for the highest proportion (74.1%).

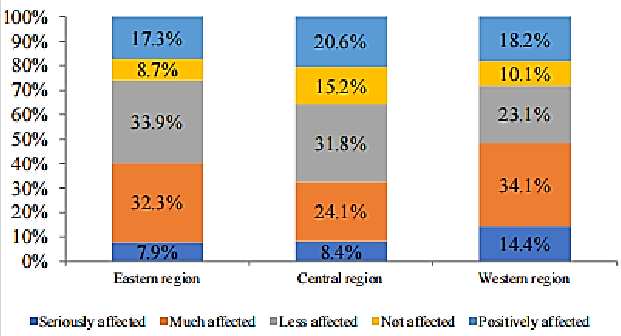


Figure 3-1-2 Diagram of Evaluations of the COVID-19 Pandemic Impact in Each Region

From the perspective of degree of impact, in western region, the “seriously affected" and “much affected" enterprises took up the highest proportion at 48.6%. In central region, the "positively affected" and "not affected" enterprises took up the highest proportion at 35.8%.

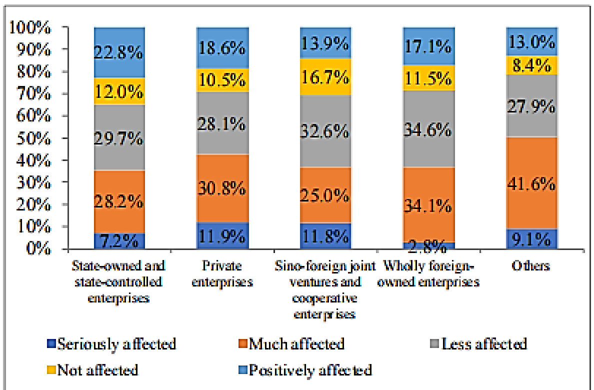


Figure 3-1-3 Diagram of Evaluations of the COVID-19 Pandemic Impact on Enterprises of Different Ownerships

From the perspective of ownership, enterprises of other ownerships were much affected by COVID-19, while state-owned enterprises were not affected or positively affected. The enterprises of other ownerships negatively affected by COVID-19 took up the highest proportion, accounting for 78.6%; state-owned enterprises and Sino-foreign joint ventures and cooperative enterprises were relatively less affected by COVID-19, in which the “not affected” and “positively affected” enterprises accounted for 34.8% and 30.6% respectively.

From the perspective of industries, the resources industry and other industries were negatively affected by COVID-19, while the construction industry was mainly not affected or positively affected. The enterprises in resources industry and other industries negatively affected by COVID-19

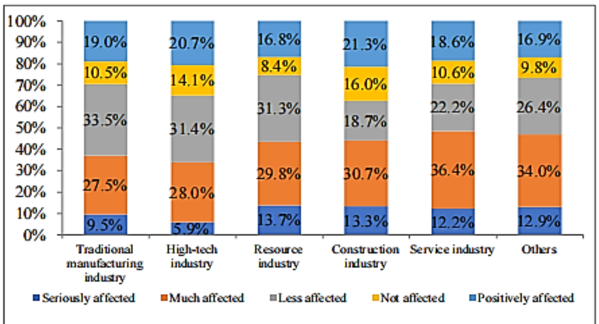


Figure 3-1-4 Diagram of Evaluations of the COVID-19 Pandemic Impact in Different Industries

accounted for 74.8% and 73.3% respectively; the "seriously affected" and "much affected" enterprises in service industry and other industries accounted for 48.5% and 47% respectively; the "severely affected" companies in the resource sector took up the highest proportion at 13.7%;

the "positively affected" enterprises took up the highest proportion in the construction industry (21.3%), followed by the high-tech industry (20.7%).

(II) The export, production & operation, supply chain and capital chain of the surveyed enterprises were obviously affected

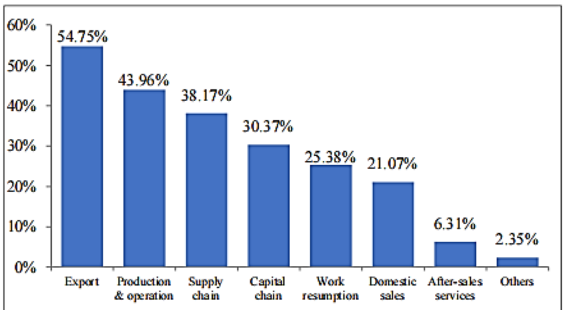


Figure 3-1-5 COVID-19 Pandemic Impact on Production & Operation Enterprise

54.75% of the enterprises said that COVID-19 had the greatest impact on export; about 43.96% and 38.17% of enterprises stated that production & operation and supply chain were obviously affected; 30.37%, 25.38% and 21.07% of the enterprises said that capital chain, work resumption and domestic sales were obviously affected; only 6.31% of enterprises reported that after-sale services were affected.

From the perspective of industries, resources industry (59.8%), construction industry (53.3%) and service industry (49.3%) stated that COVID-19 had the greatest impact on production & operation. Traditional manufacturing industry (64.8%), high-tech industry (62.8%) and other industries (58.2%) said that COVID-19 had the greatest impact on export.

More than 30% of enterprises in each industry reported that their supply chains were affected by COVID-19, among which the high-tech industry accounted for the highest proportion (48.9%).

Table 3-2-1 Main Aspects of Different Industries Affected by COVID-19

Traditional manufacturing industry	High-tech industry	Resource industry	Construction industry	Service industry	Others
Export 64.8%	Export 62.8%	Production & operation 59.8%	Production & operation 53.3%	Production & operation 49.3%	Export 58.2%
Production & operation 43.2%	Supply chain 48.9%	Supply chain 33.3%	Capital chain 49.3%	Capital chain 34.3%	Production & operation 42.4%
Supply chain 38.9%	Production & operation 36.8%	Work resumption 32.6%	Work resumption 37.3%	Supply chain 32.4%	Supply chain 36.4%
Capital chain 27.1%	Capital chain 25.6%	Domestic sales 31.8%	Supply chain 36.0%	Export 28.8%	Capital chain 33.3%
Work resumption 24.2%	Domestic sales 23.3%	Capital chain 28.8%	Export 34.7%	Work resumption 27.3%	Work resumption 25.2%
Domestic sales 18.9%	Work resumption 22.4%	Export 18.2%	Domestic sales 22.7%	Domestic sales 25.9%	Domestic sales 18.9%
After-sales services 5.8%	After-sales services 5.9%	Others 5.3%	After-sales services 2.7%	After-sales services 9.9%	After-sales services 5.8%
Others 1.4%	Others 1.1%	After-sales services 4.5%	Others 0.0%	Others 2.5%	Others 3.7%

(III) The surveyed enterprises mostly held an optimistic or merely fair attitude towards the development prospects in the post-COVID-19 era

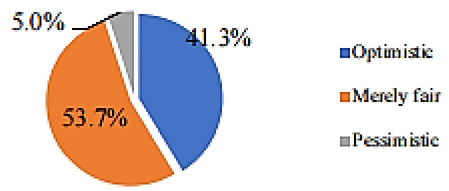


Figure 3-1-6 Predictions about Enterprises' Development Prospects in the Post-pandemic Era

According to the survey, the expectations of enterprises in the post-COVID-19 era were relatively optimistic, with 53.7% of enterprises holding a merely fair attitude, 41.3% of enterprises being optimistic about the development prospect, and only 5% of enterprises being pessimistic.

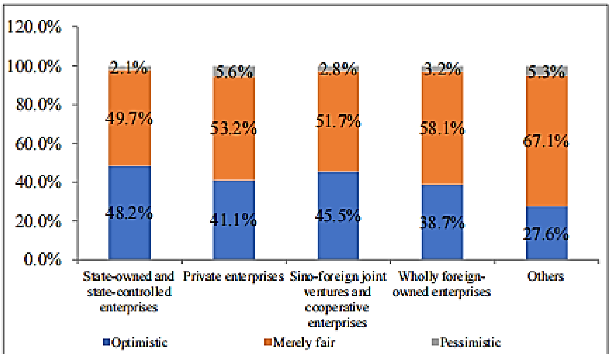


Figure 3-1-7 Predictions of Enterprises' Development Prospects in the Post-pandemic Era by Enterprises of Different Ownerships

From the perspective of ownerships, the proportions of all types of enterprises holding a "merely fair" attitude towards the development prospect in the post-COVID-19 era were similar, among which, the enterprises of other ownerships took up the highest proportion (67.1%). 48.2% of state-owned enterprises and 45.5% of Sino-foreign joint ventures and cooperative enterprises held an "optimistic" attitude, while those holding a "pessimistic" attitude accounted for 2.1% and 2.8%, respectively.

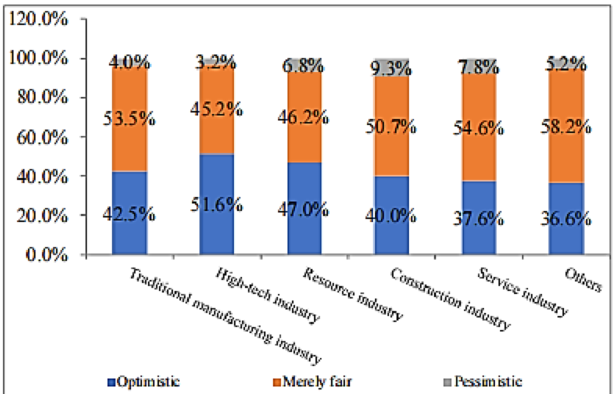


Figure 3-1-8 Predications of Different Industries about the Post-Pandemic Development Prospects

From the perspective of different industries, there were significant differences in the "optimistic" attitude of enterprises in various industries towards the development prospects in the post-COVID-19 era, among which, the enterprises in high-tech industry accounted for the highest proportion (51.6%); the enterprises holding "merely fair" attitude shared similar proportions or accounted for more than half, among which, the enterprises of other ownerships took up the highest proportion (58.2%); less than 10% of enterprises in all industries were "pessimistic".

(IV) Nearly 70% of the surveyed enterprises hoped that the government could increase tax deduction or exemption efforts

In order to minimize the impact of COVID-19, over 60% of the enterprises hoped that the government could increase tax deduction or

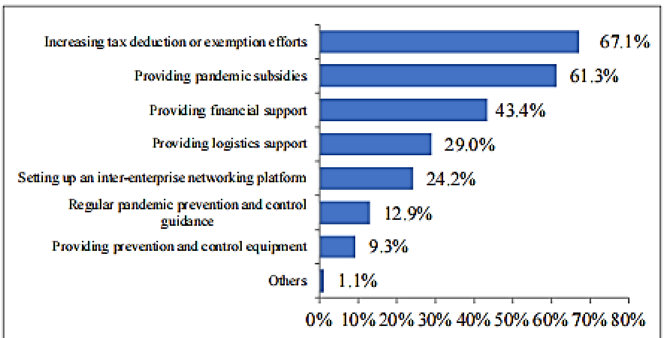


Figure 3-1-9 Supports and Assistances Hoped by Enterprises from the Government to Fight the Pandemic

exemption efforts (67.1%) and provide COVID-19 subsidies (61.3%); 43.4% of the enterprises hoped that the government could provide financial support; over 20% of enterprises hoped the government could help provide logistics support (29%) and set up an inter-enterprise networking platform (24.2%). About 10% of the enterprises hoped that the government could provide regular COVID-19 prevention guidance (12.9%) and quarantine equipment (9.3%).

(V) More than half of the surveyed enterprises have taken or may take measures to reduce production scale

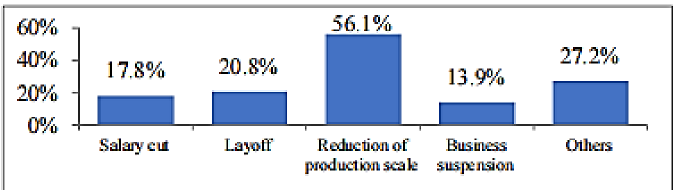


Figure 3-1-10 Measures the Enterprises Have Taken or May Take in Response to the Pandemic

Due to COVID-19, more than half of the enterprises (56.1%) have taken or may take measures to reduce production scale. 27.2%, 20.8%, 17.8% and 13.9% of the enterprises have taken other measures, layoffs, salary cuts and business suspension, respectively.

II. Over 70% of the Surveyed Enterprises Achieved Revenue Growth

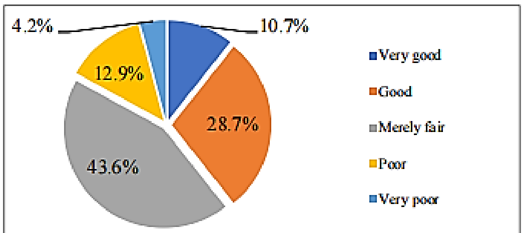


Figure 3-2-1 Current Return on Investment of Enterprises

In 2021, with the gradual economic recovery, enterprises saw an increase in their revenues, with nearly 83% of revenues reaching merely fair or above level (76.9% in 2020), and nearly 40% (39.3%) of revenues reaching good or above level.

(I) Nearly 50% of enterprises in the eastern region achieved good revenues or above

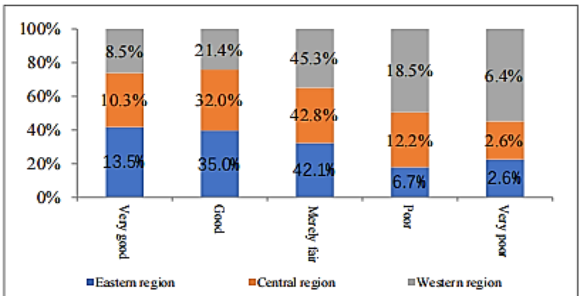


Figure 3-2-2 Return on Investment of Enterprises in Each Region

In terms of regions, the enterprises with very good revenues and good revenues in eastern region (48.6%) and central region (42.3%) exceeded the national level (39.3%); the enterprises with good revenues or above in western region took up the lowest proportion, only 29.8%. The proportions of enterprises with merely fair revenues or above in eastern, central and western regions exceeded 75%, i.e., 90.7%, 85.2% and 75.2% respectively.

(II) Over 50% of the enterprises in high-tech industry had good return on investment or above

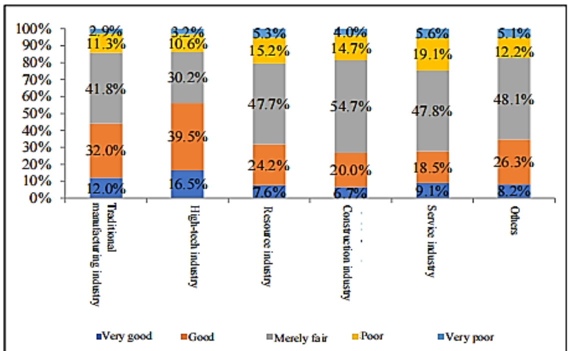


Figure 3-2-3 Return on Investment of Enterprises in Different Industries

In terms of industries, the proportion of enterprises with good return on investment or above in high-tech industry was as high as 56%, followed by traditional manufacturing industry (44%) and construction industry (26.7%). Among them, high-tech industry had the highest proportion of "very good" and "good" revenues (16.5% and 39.5% respectively), and enterprises with (merely fair or above) revenue growth accounted for the largest proportion (86.2%). Over 50% (54.7%) of enterprises in construction industry had "merely fair" return on investment, accounting for the highest proportion. The service industry took up the highest proportion of "poor" and "very poor" revenues, i.e., 24.7%.

(III) The proportion of enterprises with revenue growth increased significantly compared with the previous year

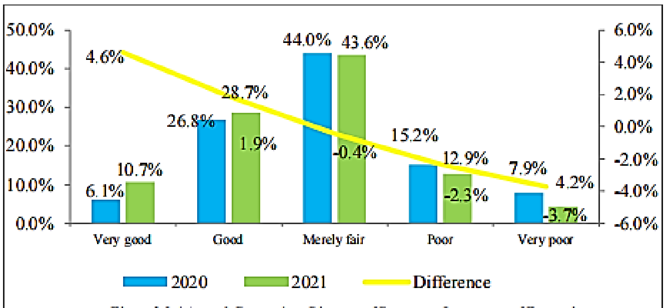


Figure 3-2-4 Annual Comparison Diagram of Return on Investment of Enterprises

The proportion of enterprises with revenue growth (revenue at "merely fair" level and above) increased from 76.9% in 2020 to 83% in 2021. The proportion of enterprises with "merely fair" return on investment was basically the same as that in the previous year. The proportion of enterprises with revenue at "good" level and above increased from 32.8% in 2020 to 39.3% in 2021, among which, the proportion of enterprises with "very good" revenue increased from 6.1% in 2020 to 10.7% in 2021. The increase in the proportion of enterprises with "good" revenue was the second largest, at 1.9%. The proportion of enterprises with revenue at "poor" level and below declined by 6.1%.

In terms of different regions, the proportion of enterprises with "very good" revenue in the eastern region achieved the highest growth rate, being 13.5%, with an increase of 7.2%; the proportions of enterprises with "good" revenue in all regions increased, and the growth rate was the most significant in the central region, with an increase of 8.5%; the proportions of enterprises with "merely fair" revenue in all regions were more than 40%, being 42.1%, 42.8% and 45.3% respectively. In 2021, the proportions of enterprises with revenue growth ("merely fair" and above) in the eastern, central and western regions exceeded those in the previous year, increasing by 10.9%, 8.9% and 3.7% respectively.

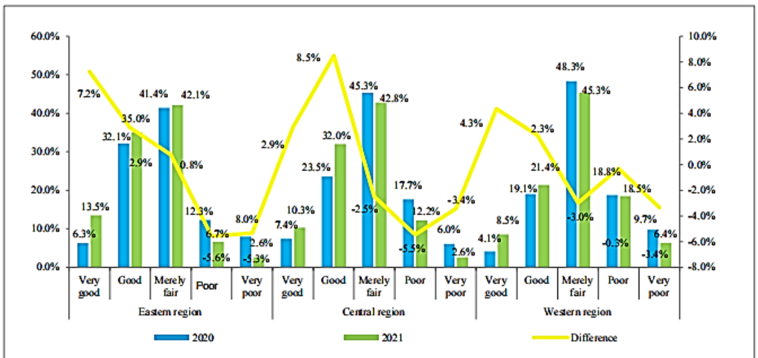


Figure 3-2-5 Annual Comparison Diagram of Return on Investment of Enterprises in Different Regions

The revenues of enterprises in different industries were quite different. The proportion of enterprises with "very good" revenue in the high-tech industry saw the largest increase (6.4%), followed by the traditional manufacturing industry (5.5%) and the service industry (4.9%). The proportion of enterprises with "poor" and "very poor" revenue in the construction industry saw the smallest increase, being 4.2%. The proportions of enterprises with positive revenue in other industries and the traditional manufacturing industry increased significantly by 12.42% and 8.73% respectively; while the proportion of enterprises with "poor" and "very poor" revenue in the resource industry increased by 7.36%.

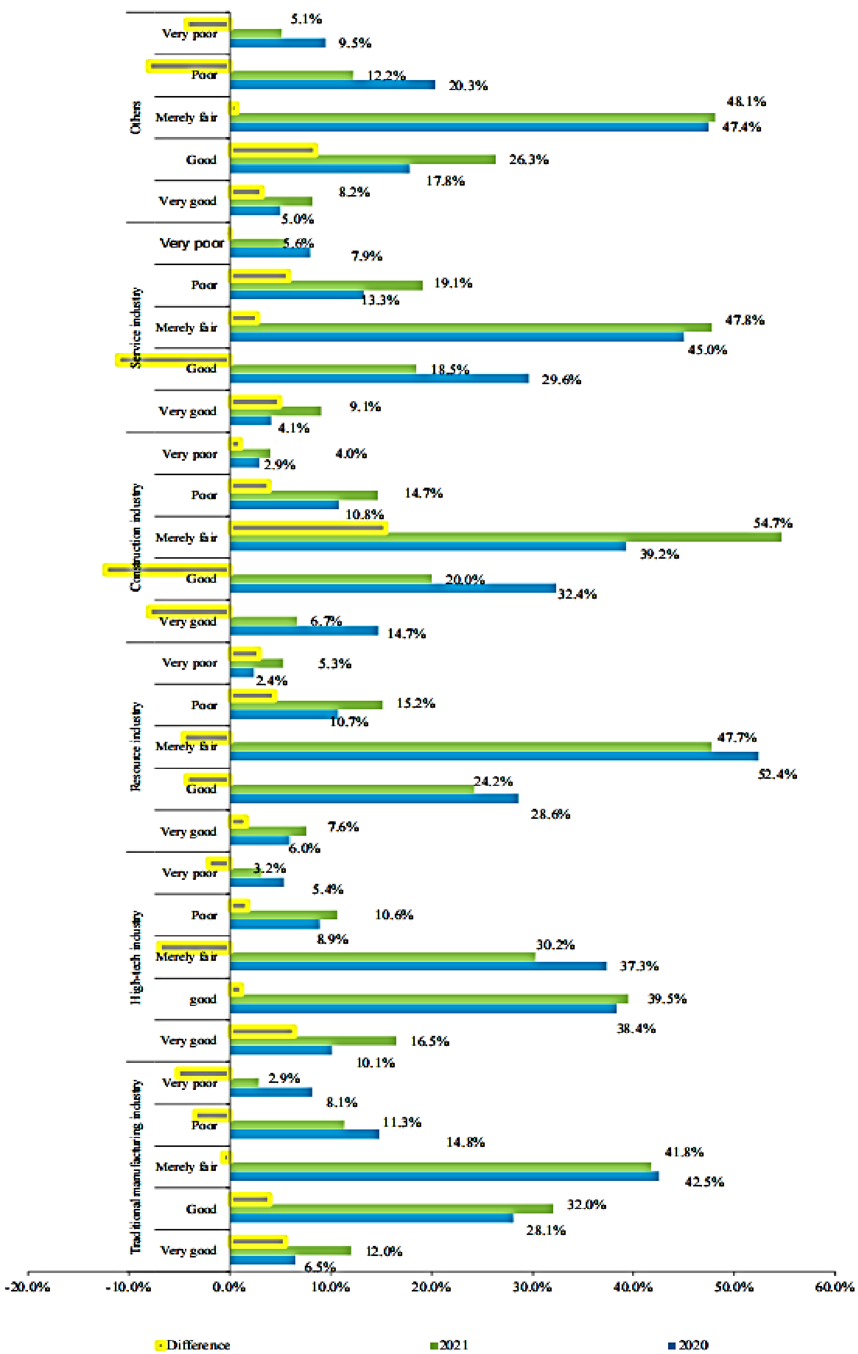


Figure 3-2-6 Annual Comparison Diagram of Return on Investment of Enterprises in Different Industries

III. The Proportion of Enterprises with Continuous Small Range Fluctuation in Revenue Over the Past Five Years was High

24.2% of enterprises have maintained a “continuous growth” in their revenue over the past five years (the proportion was 23.3% in 2020); 13.4% of enterprises have reported a “continuous decline” in their revenue over the past five years (the proportion was 11.7% in 2020). 54.1% of enterprises had “small fluctuation” in revenue change over the past five years and 6.5% of enterprises had “great fluctuation”.

(I) Over 50% of surveyed enterprises had small range fluctuation in revenue in various regions over the past five years

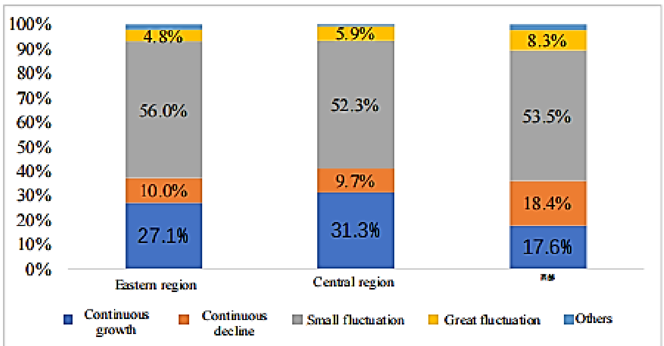


Figure 3-3-2 Changing Trend of Return on Investment over the Past Five Years in Each Region

Over the past five years, the return on investment has fluctuated slightly in various regions and over 50% of enterprises have reported “small fluctuation” in revenue. The highest proportion lay in the eastern region (56%) and the lowest proportion lay in the central region (52.3%). The enterprises with “continuous growth” in revenue took up the highest proportion in the central region (31.3%); the enterprises with “continuous decline” in revenue took up the highest proportion in the western region (18.4%) and the lowest in the central region (9.73%); there were few cases of “great fluctuation” in return on investment, and the proportions of enterprises with “great fluctuation” in return on investment were less than 10% in all regions.

(II) Over 40% of surveyed enterprises in the high-tech industry had continuous growth in revenue over the past five years

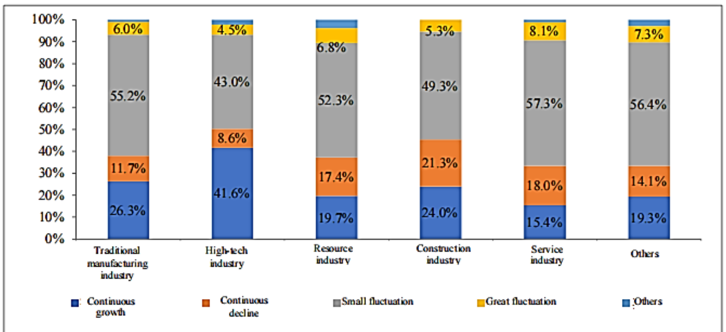


Figure 3-3-3 Changing Trend of Return on Investment in Different Industries over the Past Five Years

In terms of industries, enterprises with "small fluctuation" in revenue have all accounted for a high proportion in all industries over the past five years. In the service industry, enterprises with "small fluctuation" in revenue accounted for 57.3%. Enterprises with "continuous growth" in revenue in the high-tech industry accounted for the highest proportion (41.6%) while those in the service industry account for the lowest proportion (15.4%). Enterprises with "continuous decline" in revenue in the construction industry accounted for the highest proportion (21.3%) while those in the high-tech industry and traditional manufacturing industry accounted for the lowest proportion (8.6% and 11.7% respectively).

IV. Cost Increase and Fierce Market Competition Became Prominent Issues

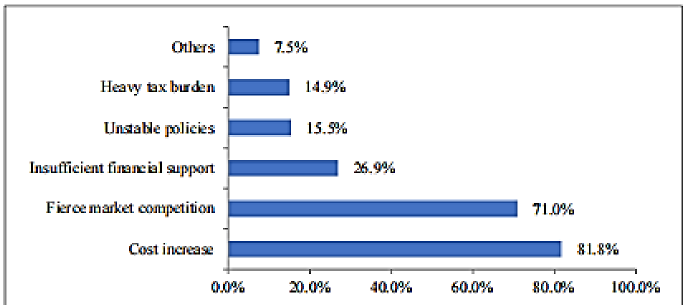


Figure 3-4-1 Issues Encountered during the Production and Operation of Enterprises

The most prominent issues during the production and operation reported by enterprises included fierce market competition and cost increase, and the attention in percentage to the two issues was 81.8% and 71% respectively. In addition, issues such as insufficient financial support (26.9%), unstable policies (15.5%) and heavy tax burden (14.9%) were also prominent.

From the perspective of different industries, the most prominent issue encountered during the production and operation in all industries was cost increase, of which traditional manufacturing industry accounted for the highest proportion (89.1%); the second prominent issue was fierce market competition, which was reported by over 60% of enterprises in all industries, with other industries accounting for the highest proportion (74%). Except the resource industry, the remaining industries deemed insufficient financial support as the third prominent issue, with the construction industry accounting for the highest proportion.

Table 3-4-1 Major Issues Encountered during the Production and Operation of Enterprises in Different Industries

Traditional manufacturing industry	High-tech industry	Resource industry	Construction industry	Service industry	Others
Cost increase 89.1%	Cost increase 83.9%	Cost increase 72.5%	Cost increase 80.0%	Cost increase 68.7%	Cost increase 79.9%
Fierce market competition 73.2%	Fierce market competition 64.0%	Fierce market competition 62.6%	Fierce market competition 69.3%	Fierce market competition 68.7%	Fierce market competition 74.0%
Insufficient financial support 24.5%	Insufficient financial support 29.2%	Unstable policies 23.7%	Insufficient financial support 36.0%	Insufficient financial support 26.8%	Insufficient financial support 28.7%
Heavy tax burden 16.6%	Heavy tax burden 17.2%	Insufficient financial support 22.9%	Unstable policies 18.7%	Unstable policies 23.7%	Heavy tax burden 16.2%
Unstable policies 10.8%	Unstable policies 14.3%	Heavy tax burden 19.8%	Heavy tax burden 18.7%	Heavy tax burden 12.5%	Unstable policies 12.0%
Others 5.1%	Others 7.0%	Others 7.6%	Others 6.7%	Others 6.6%	Others 10.9%

V. Utilization of Local Resources and Market Expansion were Major Reasons for Enterprise Investment

(I) Nearly 50% of surveyed enterprises considered utilization of local resources as the principal reason for investment

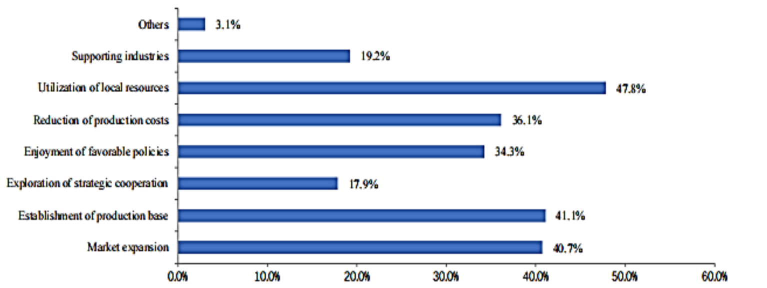
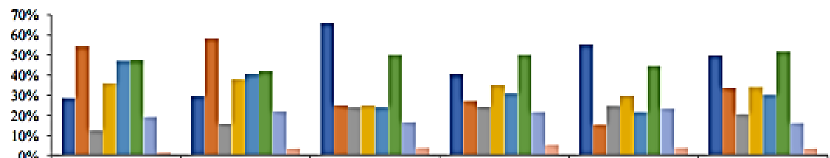


Figure 3-5-1 Major Factors for Local Enterprise Investment

47.8% of enterprises considered utilization of local resources as the principal reason for their investment and second to it were the establishment of production base (41.1%) and market expansion (40.7%). Over 30% of enterprises considered reduction of production costs and enjoyment of favorable policies as investment factors– the percentages were 36.1% and 34.3% respectively. Supporting industries and exploration of strategic cooperation were also taken into consideration for enterprise investment.



	Traditional manufacturing industry	High-tech industry	Resource industry	Construction industry	Service industry	Others
Market expansion	28.5%	29.5%	65.9%	40.5%	55.3%	49.8%
Establishment of production base	54.4%	58.2%	25.0%	27.0%	15.6%	33.5%
Exploration of strategic cooperation	12.5%	15.9%	24.2%	24.3%	24.9%	20.6%
Enjoyment of favorable policies	36.0%	38.0%	25.0%	35.1%	29.8%	34.1%
Reduction of production costs	47.1%	40.5%	24.2%	31.1%	21.6%	30.3%
Utilization of local resources	47.5%	42.0%	50.0%	50.0%	44.7%	51.9%
Supporting industries	19.3%	21.8%	16.7%	21.6%	23.3%	16.1%
Others	1.6%	3.6%	3.8%	5.4%	3.9%	3.6%

Figure 3-5-2 Major Factors for Local Investment in Different Industries

From the perspective of industries, the primary factor when enterprises invest in traditional manufacturing and high-tech industries was the establishment of production base, accounting for 54.4% and 58.2% respectively; the primary factor when enterprises invest in the resources and service industries was market expansion, accounting for 65.9% and 55.3% respectively; the primary factor when enterprises invest in the construction and other industries was the utilization of local resources, accounting for 50% and 51.9% respectively.

(II) The investment of surveyed enterprises relied on their own investigation and local governments' implementation of measures to attract investment

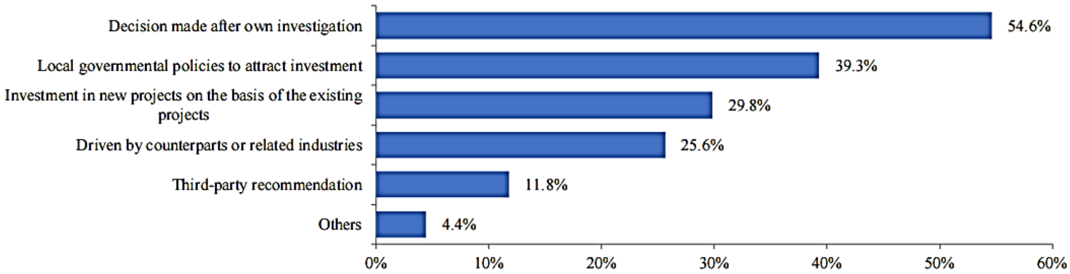


Figure 3-5-3 Approaches through Which Enterprises Make Local Investment

Over 50% (54.6%) of enterprises made their decisions on local investment through their own investigation, and nearly 40% (39.3%) of enterprises made investment as attracted by local governmental policies. The percentages of investment in new projects on the basis of the existing projects and investment driven by counterparts or related industries were 29.8% and 25.6% respectively. The percentages of investment through third-party recommendation and miscellaneous approaches were at a low level, being 11.8% and 4.4% respectively.

VI. Surveyed Enterprises Expected Government to Further Optimize Business Environment

(I) Policy and government administration environment was of great concern among surveyed enterprises

According to the investigation, most of enterprises (53.4%) hoped the government to continuously improve the policy and government administration environment, 38% of them hoped the government to improve the infrastructure environment, 30.3% of them hoped the government to improve the human resources environment, and 24.4% of them hoped the government to improve the financial service environment.

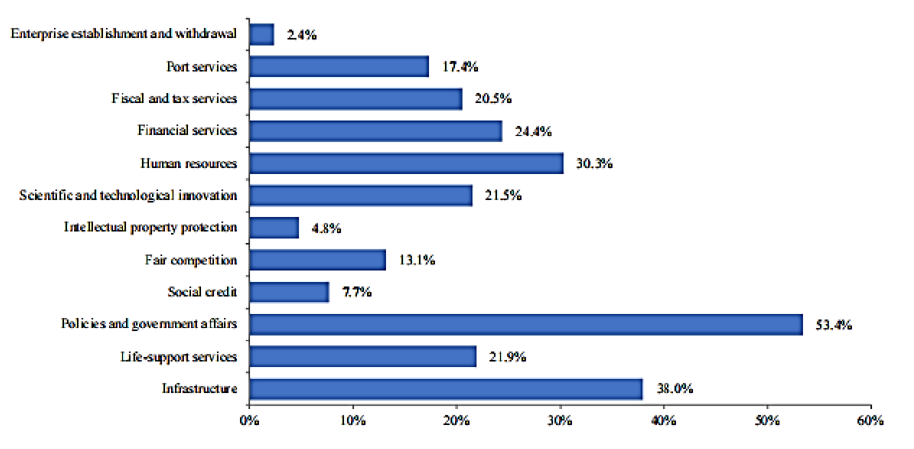


Figure 3-6-1 What Business Environment Should Government Further Improve in Enterprises' Opinion

(II) Surveyed enterprises had high requirements for the construction of regional industry chain

According to the survey results, 74.7% of enterprises hoped local governments to focus on attracting upstream and downstream supporting enterprises; 56.2% of enterprises hoped local governments to attract enterprises engaging in trade logistics; 24% and 18.8% of enterprises hoped local governments to attract enterprises engaging in financial services including leasing and guarantees and enterprises engaging in legal consultancy service respectively.

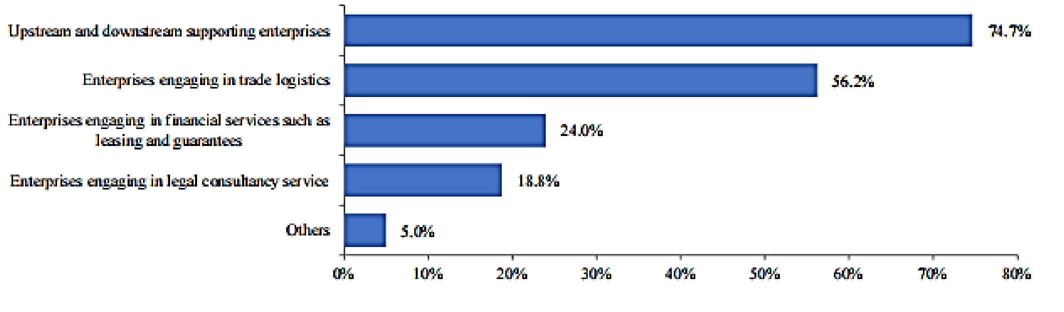


Figure 3-6-2 Types of Enterprises to be Attracted Especially by Local Governments

(II) Surveyed Enterprises Hoped the CCPIT to make a special effort to improve information platform construction

62.6% of enterprises hoped the CCPIT to establish an improved information platform and 45.7% of enterprises hoped the CCPIT to enable connection with investment projects. Additionally, 41.1%, 37.2%, 29.9% and 20.5% of enterprises requested respectively for business training, study tours at home and abroad, exhibition forums and legal services for commercial affairs.

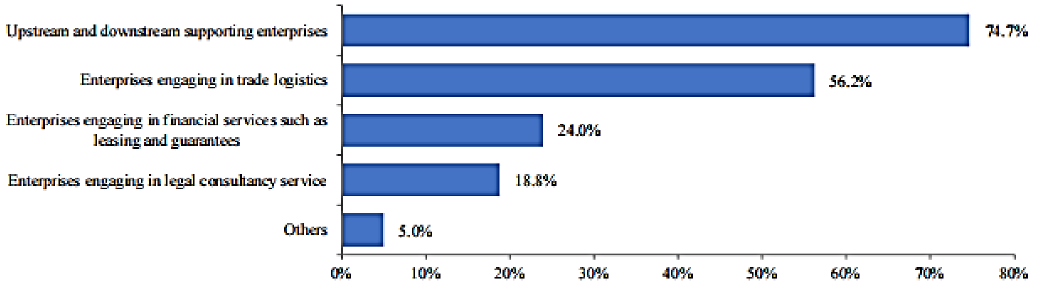


Figure 3-6-2 Types of Enterprises to be Attracted Especially by Local Governments

VII. Growth of Consumption and Middle-class Expansion Were the Most Important Business Opportunity in China

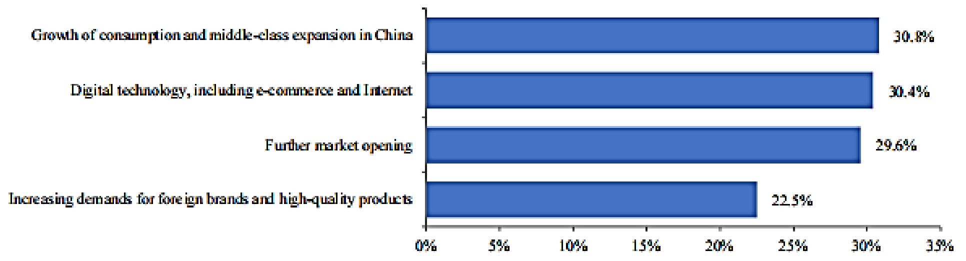


Figure 3-7-1 Most Important Business Opportunity in China

30.8% of enterprises believed that the "growth of consumption and middle-class expansion in China" should currently be the most important business opportunity in China, followed by "digital technology, including e-commerce and Internet" and "further market opening", accounting for 30.4% and 29.6% respectively; 22.5% of enterprises thought that the most important business opportunity is "increasing demands for foreign brands and high-quality products".

VIII. Over 50% of Foreign-funded Enterprises Preferred China in Their Global Investment Plans

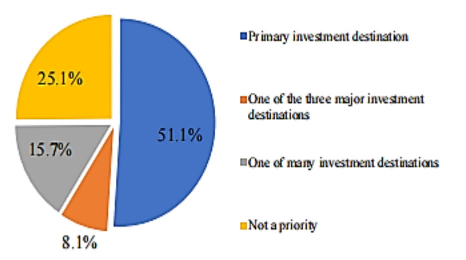


Figure 3-8-1 Importance of China in the Recent Global Investment Plans of Foreign-funded Enterprises

Over 50% (51.1%) of foreign-funded enterprises preferred China in their global investment plans; 25.1% of foreign-funded enterprises thought that China is not a priority in their global investment plans; 15.7% of foreign-funded enterprises thought that China is one of many investment destinations; 8.1% of foreign-funded enterprises thought that China is one of the three major investment destinations.

Chapter IV China's Achievements in Business Environment Construction

From 2020 to 2021, governments at all levels in China intensively introduced policies to improve the business environment, continued deepening the reforms to streamline administration, delegate power, improve regulation and upgrade services, open wider to the outside world, and actively created a marketization legalization and internationalization business environment. The business environment in China continuously reached new heights. According to the results of the 2021 China Business Environment Survey Questionnaire of the CCPIT, in 2021,the total score of China business environment was 4.38, with an increase of 0.03 over 2020.

I. Effective Regulation Provided Guarantee for Streamlining Administration and Delegating Power

According to the results of the *2021 China Business Environment Survey Questionnaire* of the CCPIT, in 2021, the enterprises' evaluation score on policies and government affairs was 4.45, an increase of 0.02 over 2020. Among them, the evaluation score on official integrity reached an excellent level of 4.52. The evaluation score on government service efficiency (4.46) followed closely behind and achieved a high evaluation.

(I) The reforms to streamline administration, delegate power, improve regulation and upgrade services was deepened

The reforms to streamline administration, delegate power, improve regulation and upgrade services focus on fostering market entities and stimulating market vitality and social creativity. Since the official implementation of the *Regulation on Improving Business Environment* on January 1, 2020, a series of policies and regulations have been promulgated and implemented in areas such as canceling the delegation of administrative licensing items, protecting market entities, improving the market environment, providing government affairs services, supervising law enforcement, and guaranteeing the rule of law. In September 2020, the Approval Reform Office of the State Council promulgated a new batch of administrative licensing items for which the delegation was cancelled. Since the 18th National Congress of the Communist Party of China, the State Council has cancelled the delegation of 1094 administrative licensing items in 16 batches. Among them, the reduction of administrative licensing items implemented by the State Council has reached 47%. In 2021, the *Report on the Work of the Government(2022)* put forward "taking effective regulation as a necessary guarantee for streamlining administration and delegating power" for the first time. The new wording of "effective regulation" shows China's resolution to further streamline administration, delegate power and optimize business environment.

On June 2, 2021, Premier Li Keqiang delivered an important speech at a teleconference to foster and stimulate the vitality of market entities, and deployed the continuous and integrated promotion of the reforms to streamline administration, delegate power, improve regulation and upgrade services, with the purpose of creating a marketization legalization internationalization business environment. On July 20, 2021,*the State Council on*

Printing and Issuing the Plan of Work Division for Key Tasks of the National Teleconference for Deepening Reforms to "Streamline Administration, Delegate Powers, Improve Regulation and Strengthen Services" and Striving to Foster and Stimulate the Vitality of Market Players was published. The first was to directly face up to the needs of market entities; innovate to implement the macroeconomic policies and deepen reforms to streamline administration, delegate power, improve regulation and upgrade services, including the fulfillment of the normalized direct fiscal fund mechanism and direct monetary policy tools; increase the supply of infrastructure and improve the quality and level of services; ensure basic living standards, with the focus on strengthening compulsory education, basic medical care, basic housing, etc. The second is to focus on creating a marketization business environment, including continuing the deepening of the administrative approval system reform; strengthen the dominant role of enterprise innovation, focusing on the use of inclusive policies such as tax incentives to encourage enterprise R&D innovation; effectively maintain a fair and competitive market order; insist on the integration of "delegation" and "regulation", and take effective regulation as a necessary guarantee for streamlining administration and delegating power. The third is to focus on creating a legalization business environment, including establishing and improving the legal system for business environment, and promoting the further implementation of the *Regulation on Optimizing Business Environment*; protect the property rights and legitimate rights and interests of various market entities in accordance with the law; strictly specify the fair and civilized law enforcement, eliminating arbitrary charges, arbitrary fines and arbitrary apportionment from the source, and cancelling all fines violating the statutory authorities and procedures. The fourth is to focus on creating an international business environment, including strengthening the connection with the relevant international rules, fully implementing the foreign investment law and related supporting regulations, and improving the pre-establishment national treatment and negative list management system for foreign investment; further optimize the foreign trade development environment, continue promoting the reduction of business costs of foreign trade enterprises, standardize port charges, deepen the construction of a "single window" in international trade, and promote the smooth flow of international logistics. The fifth is to further enhance the sense of responsibility, overcome difficulties, and promote the implementation of reform measures, including strengthening the reform responsibility, strengthening the overall reform planning, and continuing promoting the reforms to streamline administration, delegate power, improve regulation and upgrade services; standardize business environment evaluation, etc.

On July 20, 2021, the General Office of the State Council issued the *Circular of the General Office of the State Council on Printing and Issuing the Plan of Work Division for Key Tasks of the National Teleconference for Deepening Reforms to "Streamline Administration, Delegate Powers, Improve Regulation and Strengthen Services" and Striving to Foster and Stimulate the Vitality of Market Players* , with the purpose of continuous and integrated promotion of the reforms and creation of a marketization legalization internationalization business environment.

(II) "Internet + Regulation" achieved preliminary success

The nationwide integrated online regulatory system has been initially established, with continuously improved interim and post regulation effectiveness. The construction of the national “Internet + Regulation” system was developed in depth, achieving interconnection with the “Internet + Regulation” system in 31 provinces (autonomous regions and municipalities), Xinjiang Production and Construction Corps and relevant departments of the State Council. By the end of 2020, it has been accessed to 451 regulatory applications in various departments of different regions, collected 2.1 billion pieces of regulatory business data, released more than 20,000 pieces of regulatory dynamics, and owned more than 2 million registered users. The construction of key regulatory application systems has been continuously deepened, and the application of business systems such as risk warning, credit regulatory evaluation and comprehensive regulatory analysis has achieved initial results. In 2020, 410 million pieces of classified enterprise credit data and risk warning clues have been pushed to local and relevant departments, providing strong support for interim and post regulation. The application of the national enterprise credit information publicity system has achieved remarkable results, with the average daily visits of more than 100 million person-times in 2020, supporting the initial formation of a new regulatory mechanism based on credit regulation. The 12315 platform has been continuously optimized and improved. In 2020, the platform visits totaled 72.47 million person-times, 17.751 million consumer complaints were received, and economic losses of RMB 3.157 billion were saved for consumers.

The influence of the State Council’s “Internet + Supervision” platform and mini-program has kept increasing. It has built a direct channel of social conditions and public opinions for the enterprises, broadened the sources of supervision clues, optimized the supervision methods, improved the supervision effectiveness, promoted the resolution of difficulties and pain points, and ensured that major policies and measures of the CPC Central Committee and the State Council can be implemented and effective. The platform was interconnected with various regions and relevant departments to provide support and guarantee for the entire process, including timely and efficient reception, sorting, transfer, handling, feedback, analysis and statistics of problem clues. As of the end of 2020, the total number of messages received on the platform has exceeded 10 million and the number of visits has exceeded 81 million. The Supervision Office of the General Office of the State Council transferred more than 100,000 problem clues for local and departmental inspections, directly dispatched personnel for more than 120 inspections, publicly released more than 150 supervision notices, and exposed more than 300 problems found in supervisions, causing widespread concern and strong response, effectively playing a warning role, and magnifying the supervision effect. With the deepening of the reforms to streamline administration, delegate power, improve regulation and upgrade services, the digital business environment has been continuously optimized, which promoted the continuous improvement of economic innovation capabilities and competitiveness.

II. Legalization Business Environment Improved Continuously

According to the results of the *2021 China Business Environment Survey Questionnaire* of the CCPIT, the surveyed enterprises generally gave a high evaluation on the rule of law, with an average score of 4.51. The evaluation result was rated “excellent” and ranked 2^{nd} out of 12 first-level indexes. Among them, two second-level indexes, government administration according to law and legal supervision, both had the highest scores of 4.53.

In 2020, the Supreme People’s Court accepted 39,347 cases, concluded 35,773 cases, formulated 28 judicial interpretations, issued 17 guiding cases, and strengthened the supervision and guidance for the judicial work of courts across the country; local people’s courts at all levels and special people’s courts accepted 30.805 million cases and concluded and executed 28.705 million cases, and the amount of closed cases was RMB 7.1 trillion.

(I) The construction of laws and regulations in business environment was further promoted

1. Detailed regulations on the business environment was introduced successively.

The *Regulation on Optimizing Business Environment* has been promulgated throughout China, establishing the basic norms for the key links in the reforms to streamline administration, delegate power, improve regulation and upgrade services. In terms of regulation, the “random selection of inspection objects and inspectors and public release of inspection results” and “Internet + Regulation” have gradually become the basic methods and means of market regulation, and the exploration of inclusive and prudential market regulation has achieved results. The revision of the *Anti-Unfair Competition Law* has been completed, and the vitality and development resilience of market entities have been continuously enhanced.

2. The system of cybersecurity laws and regulations was initially established.

In response to the new situation of the current business environment, the *Cybersecurity Law*, *E-Commerce Law*, *Measures for Cybersecurity Review* and other cybersecurity laws and regulations have been promulgated and implemented, effectively maintaining the national security, social public interests and consumer rights; the protection of data security has been strengthened, and public opinions have been solicited for the *Personal Information Protection Law (Draft)* and *Data Security Law (Draft)*; the order of competition in the digital market has been gradually standardized, severely cracking down on cybercrimes, and making the cyberspace clearer.

3. The intellectual property protection system was continuously improved.

On October 17, 2020, the 22nd Session of the Standing Committee of the 13th National People's Congress passed the *Decision on Amending the Patent Law of the People's Republic of China*, which came into force on June 1, 2021. On December 26, 2020, the 24th Session of the Standing Committee of the 13th National People's Congress passed the *Amendment (XI) to the Criminal Law of the People's Republic of China*, which came into force on March 1, 2021. The Amendment revised such crimes as intellectual property infringement crimes, among which the maximum sentence for crimes involving intellectual property rights was raised to 10 years; in the provisions on the crime of counterfeiting registered trademarks, the protection of "service trademarks" was added; in addition, the Amendment has supplemented the types of criminal acts that infringe on trade secrets, adding a new "crime of commercial espionage". The Supreme People's Court has issued 10 judicial interpretations and normative documents including the evidence in civil litigation of intellectual property rights to further facilitate the parties to present evidence, shorten the litigation cycle, reduce the cost of rights protection, and increase the amount of compensation, and the amount of compensation awarded in intellectual property cases increased by 79.3% year-on-year. A legal environment that encourages independent innovation and promotes scientific and technological progress has gradually taken shape.

On May 10, 2021, the China National Intellectual Property Administration issued the *Notice on Deepening the Reforms to Streamline Administration, Delegate Power, Improve Regulation and Upgrade Services in the Intellectual Property Field and Optimizing the Innovation Environment and Business Environment* (GZFFZ [2021] No. 10). The *Notice* proposed that by the end of 2021, the examination period for high-value patent applications would be reduced to 13.8 months, the basic data of intellectual property rights would be fully opened, the high-quality development orientation would be emphasized, and the transformation of intellectual property work from pursuing quantity to improving quality would be promoted.

(II) Intellectual property protection has been strengthened

All relevant departments have performed their duties in accordance with the law to increase the intensity of intellectual property protection, promote the governance in key areas, and strengthen the normalized judicial protection.

First, the conclusion rate of intellectual property cases has increased significantly. In 2020, the local people's courts across China received a total of 443,300 IP civil cases of first instance, and concluded 442,700 cases, an increase of 11.10% and 12.22% respectively year-on-year. Among them, 28,500 new patent cases were received, an increase of 28.09% year-on-year; 78,200 trademark cases were received, an increase of 19.86% year-on-year; 313,500 copyright cases were received, an increase of 6.97% year-on-year. The local people's courts across China received a total of 43,000 new IP civil cases of second instance, and concluded 43,500 cases, a decrease of 13.54% and 10.67% respectively year-on-year. In 2020, the local people's courts across China received a total of 18,500 new IP administrative cases of first instance, and concluded 17,900 cases, an increase of 14.44% and 0.02% respectively year-on-year. The local people's courts across China received a total of 6,092 new IP administrative cases of second instance, and concluded 6,183 cases. Among the concluded cases, the original judgments were affirmed in 4,828 cases, the original sentence was changed in 1,214 cases, 2 cases were remanded for retrial, 114 cases were withdrawn, and 4 cases were dismissed. In 2020, the local people's courts across China received 5,544 new cases of infringement on intellectual property rights of first instance, and concluded 5,520 cases, an increase of 5.76% and 8.77% respectively year-on-year. The local people's courts across China received 869 new cases involving intellectual property rights of second instance, and concluded 854 cases, an increase of 7.55% and 5.82% respectively year-on-year.

Second, the high-pressure crackdown on criminal crimes of intellectual property rights was unprecedented. The "Kunlun 2020" special action was conducted, focusing on combating the intellectual property infringement crimes. In 2020, the public security organs across China detected more than 21,000 criminal cases of infringement on intellectual property rights and production and sale of counterfeit goods, and arrested more than 32,000 suspects, with a total value of more than RMB 18 billion. They carried out more than 41,000 law enforcement actions against the physical market, and more than 260 activities to destroy infringing and counterfeit goods. The *Ten Measures for Cracking Down on Crimes in Food and Drug Environment and Intellectual Property Field According to Law to Ensure Resumption of Work and Production During COVID-19 Prevention and Control Period* was introduced to help enterprises resume work and production during COVID-19 of novel coronavirus-infected pneumonia. Domestic and foreign enterprises have been criminally protected in accordance with the same standards and requirements, and a number of criminal cases involving foreign brands were detected. More than 70 domestic and foreign enterprises expressed their gratitude and greater confidence in the healthy development of the Chinese market.

(III) The role of justice in promoting development, stabilizing expectations, and guaranteeing people's livelihood was obvious

In 2020, the Supreme People's Court gave full play to the role of justice in promoting development, stabilizing expectations, and guaranteeing people's livelihood. It timely issued four opinions on the trial of pandemic-related civil and commercial cases, foreign-related commercial and maritime cases, enforcement cases, etc., and guided courts at all levels to properly respond to litigation issues caused by COVID-19 and accurately serve the “stabilization of employment, financial sector, foreign trade, foreign investment, investment, and expectations” and “guarantee of employment, basic livelihood, market entities, food and energy security, industrial and supply chains stability, and community-level operations”. The property preservation measures were urgently changed for 1,386 anti-COVID-19 material production enterprises to support the expansion of production for COVID-19 fighting. The Qingdao Court organized and completed the hearing within 4 hours and ruled that the funds were unfrozen, allowing the indicted ventilator enterprise to quickly resume operation. The courts in Suzhou, Weihai, Xinxiang, etc. urgently allowed enterprises in bankruptcy to resume production to ensure the supply of medical products in shortage. In response to the difficulty in performing contracts due to COVID-19, force majeure and other rules were accurately applied in accordance with the law, and 43,000 cases related to contract breaches, enterprise debts, housing leases, etc. were properly handled. Courts in Beijing, Shanghai, Guizhou, Yunnan, Xinjiang, etc. implemented policies to benefit enterprises and people and strengthened the coordination between government and courts, making every endeavor to help enterprises, especially the micro, small and medium-sized enterprises, overcome difficulties, and protect and stimulate the vitality of market entities. Courts at all levels suspended the enforcement measures against 25,000 enterprises, and adopted measures such as “flexible seizure” in 181,000 civil and commercial cases, releasing RMB 163.1 billion of funds, 8.69 million mu of land, and 32.71 million square meters of plants for enterprises, and helping 36,000 enterprises resume work and production. The courts resolutely required correction of employment discrimination related to COVID-19, strictly prohibited illegal termination of labor relations only on the grounds that workers had been infected with COVID-19 or came from areas with severe pandemic, and supported and regulated flexible employment such as employee sharing and online odd jobs in accordance with the law, so that the people could get legal protection for employment amid COVID-19. The judicial protection of property rights was strengthened, and 34 misjudged criminal cases involving property rights and 56 persons were corrected in accordance with the law.

III.Tax and Fee Reduction Measures Have Produced Notable Results

The *Paying Taxes 2020* issued by the World Bank states that the World Bank has positively evaluated the effects of "tax and fee reduction" measures implemented by China in recent years. China's "total tax and contribution rate" have been significantly reduced, and the overall performance has been steadily improved.

According to the results of the *2021 China Business Environment Survey Questionnaire* of the CCPIT, in 2021, the enterprises' evaluation on fiscal and tax services ranked first among the 12 first-level indexes, with an average evaluation score of 4.52, being excellent. The total contribution rate (percentage of contributions to total profits) dropped from 21.96% in 2020 to 15.46% in 2021; the total tax rate dropped from 34.15% in 2020 to 24.84% in 2021.

(I) The tax and fee reduction policies was improved

In order to encourage enterprise innovation and promote industrial upgrading, the executive meeting of the State Council on March 24, 2021 deployed and implemented policies such as increasing the percentage of weighted deductions for R&D expenses of manufacturing enterprises. In order to implement the measures to support enterprise innovation in the *Report on the Work of the Government*, the meeting decided that, starting from January 1, 2021, the percentage of weighted deductions for R&D expenses of manufacturing enterprises would be increased from 75% to 100%, equivalent to that for every RMB 1 million invested in R&D, RMB 2 million could be deducted from the taxable income. The second decision was to reform the settlement for the weighted deductions for R&D expenses, allowing enterprises to choose to enjoy the weighted deductions semiannually. The mode of deducting R&D expenses in the first half of the year during the final settlement and payment of enterprise income taxes in the next year was changed to the mode of deducting R&D expenses during the prepayment in October of the year. Therefore, the enterprises can be benefited as soon as possible.

The executive meeting of the State Council on March 31, 2021 determined the preferential tax policies to further support small and micro enterprises, individual industrial and commercial households and advanced manufacturing enterprises. The meeting determined that: First, increase the income tax preferential policies for small and micro enterprises and include individual industrial and commercial households in the scope of preferential policies. From January 1, 2021 to the end of 2022, for the annual taxable income of small and micro enterprises and individual industrial and commercial households less than RMB 1 million, on the basis of current preferential policies, the income tax would be halved to further reduce the actual tax burden. Second, from April 1, 2021 to the end of 2022, increase the value-added tax threshold for small-scale taxpayers such as small and micro enterprises and individual industrial and commercial households from monthly sales of RMB 100,000 to RMB 150,000. Third, starting from April 1, 2021, include manufacturing enterprises, such as transportation equipment, electrical machinery, instrumentation, medicine, and chemical fiber, in the scope of the policy of refund of excess VAT paid for the advanced manufacturing enterprises, and monthly refund the incremental excess VAT paid in full amount. At the same time, it was also determined to continue the institutional tax cut policies, including value-added tax rate lowering, value-added tax refund, personal income tax deductions, and special additional deductions; classify and adjust the phased policies introduced during COVID-19, extend the implementation period of policies such as the reduction of value-added tax for small-scale taxpayers, and maintain the necessary support for economic recovery; continue the fee reduction measures and gradual reduction of unemployment insurance and employment injury insurance premium rates, cancel the port construction fees, lower the collection standard of airline civil aviation development funds, and intensify the rectification of various illegal corporate fees. A number of tax and fee reduction measures were adopted.

(II) The scale of tax and fee reduction was huge

During the “13th Five-Year Plan” period, China’s cumulative tax and fee reduction exceeded RMB 7.6 trillion, of which tax reduction was RMB 4.7 trillion and fee reduction was RMB 2.9 trillion. Especially in 2020, in response to the sudden outbreak of COVID-19, facing the severe and complex situation and difficulties in financial revenue and expenditure, 7 batches of 28 tax and fee reduction policies were issued and implemented, and the tax and fee reduction amounted to an additional RMB 2.6 trillion throughout the year, which strongly supported the market entities to resume work and production, assisted the development of enterprises in relief, and promoted the sustained and stable recovery of China's economy. The ratio of tax revenue to GDP in China is the lowest among the major economies in the world, and the ratio has been declining year by year. Through a number of tax and fee reduction measures, it was expected that the burden of the whole society would be reduced by more than RMB 700 billion in 2021.

IV. Trade and Investment Facilitation Has Been Enhanced Significantly

(I) The market access negative list system was implemented comprehensively

Since the official release of the market access negative list system in December 2018, in accordance with the principle of "annual revision", three versions of the market access negative list have been released. Compared with the 2018 list, the number of items in the 2020 list was decreased from 151 to 123, with the reduction ratio reaching 18%. The "one list for the whole country" management model was fully established, a number of hidden barriers hindering the fair access of market entities were cleared, the list system was continuously improved, and the investment liberalization and facilitation was significantly enhanced.

(II) Free trade agreements with multiple countries were signed and entered into force

The first free trade agreement with an African country was signed. On January 1, 2021, the *Free Trade Agreement between the Government of the People's Republic of China and the Government of the Republic of Mauritius* officially came into effect. In the field of trade in goods, the proportions of product tax items for which China and Mauritius finally achieved zero tariffs reached 96.3% and 94.2% respectively. In the field of trade in services, the two sides promised to open more than 100 sub-sectors. In addition, the two sides reached agreement in many areas, such as economic and technical cooperation, rules of origin, trade remedies, and technical trade barriers.

The tariff reduction arrangements were implemented with Mongolia. On January 1, 2021, China and Mongolia mutually implemented the tariff reduction arrangements under the *Asia-Pacific Trade Agreement*. Mongolia reduced tariffs on 366 tax items, mainly involving aquatic products, vegetables and fruits, animal and vegetable oils, mineral products, wood, cotton yarn, chemical fiber, mechanical products, transportation equipment, etc. The average tax cut was 24.2%. In addition, China's tariff reduction arrangements under the *Asia-Pacific Trade Agreement* were applicable to Mongolia.

The free trade agreement with New Zealand was upgraded. On January 26, 2021, China and New Zealand officially signed the *Protocol between the Government of the People's Republic of China and the Government of New Zealand on Upgrading the Free Trade Agreement between the Government of the People's Republic of China and the Government of New Zealand*, to further optimize the rules of origin, technical trade barriers, customs facilitation and other trade rules. In the field of trade in services, on the basis of RCEP, China further expanded the opening up in terms of aviation, education, finance, elderly care, and passenger transportation to New Zealand. In the arrangement of work permits for special types of work, New Zealand doubled the quota for new employment of Chinese teachers and Chinese tour guides for which a large number of Chinese citizens apply, to 300 and 200 respectively. In the field of investment, New Zealand relaxed the review threshold for Chinese investment and confirmed that it would grant Chinese investment the same review threshold as members of the *Comprehensive and Progressive Agreement for Trans-Pacific Partnership* (CPTPP).

RCEP was co-signed with 14 countries. On November 15, 2020, the *Regional Comprehensive Economic Partnership* (RCEP) among China, ten ASEAN members, Japan, South Korea, Australia and New Zealand was officially signed, indicating that the free trade zone with the world's largest population (about half of the world's total population), the largest economic and trade scale (about one-third of the global GDP) and the greatest development potential (about one-third of the global trade volume) officially set sail. According to the agreement, RCEP members will mutually implement tariff reduction, open market access, remove trade barriers, simplify customs clearance procedures, etc. to promote trade and investment facilitation, and will further reduce regional trade and investment costs, which will play a positive role in promoting the growth of trade and investment among regional countries. According to the RCEP requirements, after 6 ASEAN member states and 3 non-ASEAN member states approve the agreement, the agreement would be mutually effective among the approving countries.

The pilot program of retail import in cross-border e-commerce was further expanded. On January 17, 2020, six ministries and commissions including the Ministry of Commerce, the National Development and Reform Commission, the Ministry of Finance, the General Administration of Customs, the State Taxation Administration, and the State Administration for Market Regulation jointly issued the *Notice on Expanding the Pilot Program of Retail Import in Cross-border E-commerce* to expand the scope of the pilot program for retail import in cross-border e-commerce. In April 2020, the State Council decided to set up 46 comprehensive pilot zones on the basis of 59 cross-border e-commerce comprehensive pilot zones in the country, and expand the pilot program of retail import in cross-border e-commerce to 86 cities and the whole island of Hainan, covering 31 provinces, autonomous regions, and municipalities directly under the Central Government. As of September 2021, the number of cities with cross-border e-commerce comprehensive pilot zones has reached 105. Since 2020, the General Administration of Customs has comprehensively promoted the supervision measures for return of cross-border e-commerce export goods, and fully supported the cross-border e-commerce export enterprises to "sell in the world".

Other free trade agreements. China and the EU completed negotiations on the EU-China Comprehensive Agreement on Investment on December 30, 2020, and the agreement was then temporarily frozen by the European Parliament. China, Japan and South Korea jointly promoted the negotiations on the China-Japan-South Korea Free Trade Area and actively advanced the development of regional economic integration in East Asia. China was actively considering joining the CPTPP to strengthen international connection in terms of new economic and trade rules, such as competitive neutrality, cross-border data flow, cross-border delivery of digital service trade, government procurement, intellectual property protection, investment disputes, and collective wage negotiations.

(III) Remarkable achievements were made in the construction of pilot free trade zones

The construction of pilot free trade zones is an important strategic measure to promote reform and opening-up in the new era. Great achievements have been made so far.

First, the regional layout of the pilot free trade zones has been increasingly optimized. The 21 pilot free trade zones have covered all areas in the eastern, central and western regions of China. In addition, the Shanghai Lin-gang New Area has been added to expand the scope of the Zhejiang Pilot Free Trade Zone. In June 2020, the *Master Plan for the Construction of Hainan Free Trade Port* was officially released, aiming at gradually exploring and steadily advancing the construction of a free trade port with Chinese characteristics. At present, Hainan's business environment has been effectively improved with obvious level of internationalization, and many market entities have been gathered, laying a solid foundation for the construction of a free trade port.

Second, greater reform autonomy has been granted to the pilot free trade zones. 23 master plans have been issued successively, detailing more than 2,800 pilot reform tasks.During the "13th Five-Year Plan" period, the pilot free trade zones have explored and formed 173 institutional innovations and replicated and promoted them nationwide, reaching a total of 260.

Third, the high-level opening-up has been developing in depth. The special management measures for the negative list of foreign investment access in the pilot free trade zones have been reduced from 190 items initially to 122 items at the beginning of the "13th Five-Year Plan" period and then to 30 items by 2020. The first negative list of foreign investment access in Hainan Free Trade Port only had 27 items.

Fourth, a number of major projects have settled in the pilot free trade zones. As of the end of August 2021, the Jiangsu Pilot Free Trade Zone, with one-thousandth of the province's land area, has gathered 9% of high-tech enterprises, contributing approximately 6% of newly established enterprises, approximately 10% of foreign capital actually used, and approximately 13% of import and export volume, and playing an important role as an engine for the province's high-quality development. The Yunnan Pilot Free Trade Zone has signed 156 projects and successfully introduced major industrial projects such as GLP Industrial Park, Henan Bonded Cross-border E-commerce, and Huawei Smart Park, with a total investment of RMB 66 billion. 72 projects have been commenced, with a total investment of RMB 52.5 billion. In the Shanghai Pilot Free Trade Zone, the headquarters economy has developed significantly, and the financial industry has developed rapidly; in the Tianjin Pilot Free Trade Zone, the financial leasing industry has been developing rapidly; in the Zhejiang Pilot Free Trade Zone, the entire oil and gas industry chain has been growing rapidly; in the Fujian Pilot Free Trade Zone, aviation maintenance has become a typical development industry; in the Guangxi Pilot Free Trade Zone, relying on the Nanning core base of the China-ASEAN Information Harbor, the construction of a number of digital economy projects has been accelerating, and Huawei, Inspur, Tencent, iFlytek, Digital Fintech, Alibaba Cloud Computing, 360 Security, QI-ANXIN and other industrial leading enterprises have settled in; in the Qingdao area of the Shandong Pilot Free Trade Zone, 48 representative key industrial projects with a total investment of RMB 50.3 billion have been signed, covering such five leading industries as modern marine, international trade, shipping logistics, modern finance and advanced manufacturing.

(IV) The business environment at customs was impoved continuously

On July 21, 2021, the executive meeting of the State Council made arrangements for further deepening the reform of cross-border trade facilitation and optimizing the port business environment, and put forward new requirements. In order to implement the spirit of the meeting, 27 specific measures in 5 aspects were introduced by various departments of the General Administration of Customs, not only helping the acceleration of cross-border trade, but also injecting momentum into the creation of new advantages in opening-up.

Regulatory certificates for import and export processes have been simplified. In 2021, the regulatory certificates that need to be verified in the import and export processes have been reduced from 86 in 2018 to 41, a decrease of 52.3%. Among the 41 types of regulatory certificates, except

3 types that cannot be accessed to the Internet for special reasons, the remaining 38 types can all be applied for and processed online.

The level of informatization and intellectualization of port customs clearance has been greatly improved. The "single window" function in international trade has been actively expanded. At present, the interfacing and information sharing between the "single window" and 25 departments have been realized, serving all ports and various regions in China, and basically satisfying the enterprise needs for "one-stop" business handling. At the same time, the "single window" has cooperated with the financial and insurance institutions to effectively solve the financing difficulties and high financing costs of micro, small and medium-sized foreign trade enterprises, benefiting more than 200,000 enterprises.

The time for customs clearance of imported and exported goods has been greatly reduced. In June 2021, the overall time for customs clearance of imports and exports across China was 36.68 hours and 1.83 hours respectively, a reduction of 62.34% and 85.15% respectively from 2017.

According to the results of the *2021 China Business Environment Survey Questionnaire* of the CCPIT, the customs service ranked second among the 12 indexes, with an excellent score of 4.51. The evaluation on the three second-level indexes, goods clearance, inspection and quarantine, and personnel entry and exit, has improved compared with that in 2020.

V. Infrastructure Environment Has Been Optimized Continuously

According to the results of the *2021 China Business Environment Survey Questionnaire* of the CCPIT, in 2021, the surveyed enterprises' evaluation on the infrastructure environment was generally high, with a score of 4.35, an increase of 0.04 over 2020. The evaluation on the index of environmental protection facilities improved the most (by 0.12), followed by urban planning and construction, and water, electricity and gas supply (by 0.06 and 0.04 respectively).

(I) Steady progress has been made in the construction of railway and highway infrastructure

At the end of 2020, the length of railways in service nationwide was 146,000 kilometers, an increase of 5.3% over that at the end of the previous year, among which, the length of high-speed railways in service was 38,000 kilometers, accounting for two-thirds of the length of high-speed railways in service in the world; the total length of highways in service nationwide was 5,198,100 kilometers, an increase of 3.7% over that at the end of the previous year, among which, the length of expressways ranked first in the world with 161,000 kilometers open to traffic; there were 241 certified civil aviation airports nationwide, an increase of 3 over that at the end of the previous year, including 27 airports with an annual passenger throughput of more than 10 million person-times; the length of inland waterways in service nationwide was 128,000 kilometers, an increase of 387 kilometers over that at the end of the previous year; the ports nationwide had 22,142 production berths, including 2,592 berths of 10,000 tons and above, accounting for 11.7% of the total berths, and ranking first in the world.

(II) Remarkable achievements have been made in new infrastructure construction

1. The scale of information infrastructure construction has been at the forefront of the world

China has built the world's largest fiber-optic network and 4G network. The penetration rate of fixed broadband network in households has increased from 52.6% at the end of 2015 to 96% at the end of 2020, and the penetration rate of mobile broadband network has increased from 57.4% at the end of 2015 to 108% at the end of 2020. The proportions of administrative villages and poor villages in China that have access to fiber-optic network and 4G network reached more than 98%. The speed and scale of 5G network construction ranked first in the world, with 718 thousand 5G base stations built and more than 200 million 5G terminal connections. The access traffic of mobile Internet users has increased from 4,190 million GB at the end of 2015 to 165,600 million GB in 2020. The number of national domain names ranked first in the world. The large-scale deployment under the Internet Protocol Version 6 (IPv6) has achieved remarkable results. The IPv6 upgrade and transformation of fixed broadband and mobile LTE networks have been fully completed. By the end of 2020, the number of active IPv6 users has reached 462 million. The Beidou-3 global satellite navigation system has been launched, with the global positioning accuracy better than 10 meters.

2. The data center market has been growing rapidly.

In 2020, the scale of China's data center market has reached RMB 195.8 billion, an increase of RMB 39.5 billion over 2019. It was expected that this scale would exceed RMB 590 billion by 2025. In 2020, the scale of China's cloud computing market has reached RMB 177.64 billion, an increase of 33.41% over 2019. It was expected that the market would maintain its current growth rate in 2021, reaching RMB 233.06 billion. In the future, China's cloud computing market would continue rapid growth. With the large-scale commercialization of 5G, edge computing has moved from the exploration stage to the commercialization stage, and has gradually become a rigid demand for the digital transformation of vertical industries. In 2021, 3.37% of enterprises in China have already applied edge computing, and the proportion of enterprises planning to use edge computing reached 44.23%. The construction of supercomputing centers has entered the fast lane. As of the end of 2020, there have been more than 10 supercomputing centers built or under construction in China. The *Three-Year Action Plan for the Development of New Data Centers* (2021-2023) issued by the Ministry of Industry and Information Technology states that, in 3 years, the development pattern of green and low-carbon new data centers with reasonable layout, advanced technology, and computing power commensurate with the growth of the digital economy would be basically formed.

The "Eastern Data and Western Computing" project has been launched. On May 24, 2021, four ministries and commissions including the National Development and Reform Commission, the Office of the Central Cyberspace Affairs Commission, the Ministry of Industry and Information Technology, and the National Energy Administration jointly issued the *Implementation Plan of Computing Power Hub of Collaborative Innovation System of National Integrated Big Data Center*, proposing to build national hub nodes of the national computing power network in the Beijing-Tianjin-Hebei Region, Yangtze River Delta, Guangdong-Hong Kong-

Macao Greater Bay Area, Chengdu and Chongqing, as well as Guizhou, Inner Mongolia, Gansu, and Ningxia, start the implementation of the "Eastern Data and Western Computing" project, build a national computing power network, develop clusters of data centers, and guide the intensive, large-scale, and green development of data centers.

3. The international cooperation in cyberspace has been deepened and expanded.

China has actively participated in the formulation of international rules in the digital field of multilateral mechanisms of the United Nations, G20, BRICS, APEC and WTO, and promoted the *G20 Digital Economy Development and Cooperation Initiative*, "*Belt and Road" Digital Economy International Cooperation Initiative*, *Action Initiative to Build a Community with a Shared Future in Cyberspace*, and *Global Data Security Initiative*, contributing China's solutions to the development of the global digital economy and cyberspace governance. By the end of 2020, China has signed a *Memorandum of Understanding on "Digital Silk Road" Cooperation* with 16 countries, and established a "Silk Road E-commerce" bilateral cooperation mechanism with 22 countries. Network intercommunication has been promoted. China has built relevant land cables and submarine cables with more than a dozen countries along the "Belt and Road". The system capacity has exceeded 100Tbps, directly connecting Asia, Africa, Europe and other parts of the world. The competitiveness of information and communication technologies, products and services in the international market has increased significantly.