《2022年度中国营商环境研究报告》

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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。习近平总书记在中国共产党第二十次全国代表大会报告中强调，要完善产权保护、市场准入、公平竞争、社会信用等市场经济基础制度，优化营商环境。2022 年政府工作报告继续提出，要围绕打造市场化法治化国际化营商环境，持续推进“放管服”改革。近年来，尽管面对疫情冲击、经济下行压力增大等不利因素，中国优化营商环境工作仍取得了一定成效。国家税务总局数据显示，2022 年前 5 个月，全国新办涉税市场主体 554.7 万户，同比增长 6.2%。国家统计局最新数据显示，2022 年前三季度国内生产总值约 87 万亿元，按不变价格计算，同比增长 3.0%，比上半年加快 0.5 个百分点；分产业看，第一、二、三产业分别同比增长 4.2%、3.9%、2.3%。

目前，全球疫情仍在持续，世界经济复苏动力不足，大宗商品价格高位波动，外部环境更趋复杂严峻和不确定。中国经济发展则面临需求收缩、供给冲击、预期转弱三重压力，消费和投资恢复迟缓，稳出口难度增大，中小微企业、个体工商户生产经营困难等问题。因此，进一步优化营商环境、激发市场活力，仍是当前需要持续关注的重大问题，营造一流营商环境任务艰巨、意义重大。

为充分发挥贸促系统资源优势，协助有关部门优化营商环境，中国贸促会贸易投资促进部（以下简称“促进部”）、贸促会研究院（以下简称“研究院”）自 2016 年起连续六年开展中国投资（营商）环境调查、发布年度报告。在此基础上，2022 年课题组继续开展营商环境调研及报告编制工作，旨在密切跟踪、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，并研提意见建议，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

2022 年 5-9 月，中国贸促会促进部与研究院联合地方贸促会、行业分会及中国贸促会自贸试验区服务中心，组织开展 2022 年度中国营商环境企业问卷（详见附件）调查工作，共回收问卷 7657 份，其中线上收集 5372 份，线下收集 2285 份，江西、湖北、广西、甘肃、山西、福建、湖南收集问卷均超过 300 份。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，为开展全国性营商环境分析与评价提供了客观数据支撑。

（二）实地调研

2022 年 4-9 月，课题组分赴云南、江西、江苏等地调研，实地走访了江西南昌高新技术产业园、江苏自贸区南京片区等超 20 个园区，与 700 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。课题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提供了支持。

（三）线上座谈

2022 年 4-9 月，为在做好疫情防控的同时稳步推进中国营商环境调研工作，课题组联合广西、湖北贸促会举行线上营商环境调研，与超 200 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 2022 年中国营商环境相关数据与 2021 年进行横向、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）间的动态变化状况，深入了解不同地区、行业和企业间营商环境差异、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搜集梳理，查阅世界银行、联合国贸发大会等国际组织、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，江西、广西、湖北、甘肃、天津等地贸促会及地方贸促支会也提供了营商环境相关资料，进一步丰富了报告内容。

三、评价指标

在参照 2021 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，课题组结合本年度实际情况，完善了 2022 年度中国营商环境评价指标体系及相应企业调查问卷。

经过反复论证分析，2022 年度中国营商环境评价指标体系由 12 个一级指标和 48 个二级指标组成。各一级指标由二级指标加权平均得出（表 0-1），综合评价由企业一级指标取算数平均得出。

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。

表 0-1　2022 年度中国营商环境普遍调查评价指标及其权重设置

一级指标（12 个）	二级指标（48 个）和企业自主填写指标（11 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） 政府信用度（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） **企业自主填写指标（2 个）：**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） **企业自主填写指标（2 个）：**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） **企业自主填写指标（2 个）：**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） **企业自主填写指标（5 个）：**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）
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）

四、受访企业构成

（一）七成以上受访企业为私营企业

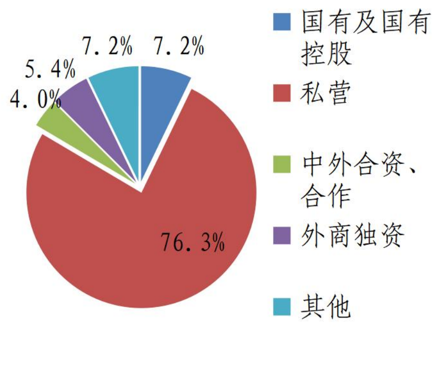


图0-1 受访企业所有制分布

本次调研中，76.3%的受访企业是私营企业；国有及国有控股企业（以下简称国有企业）及其他所有制企业占比均约为 7.2%；外商独资企业占 5.4%；中外合资合作企业占 4.0%。

（二）传统制造业企业占三分之一

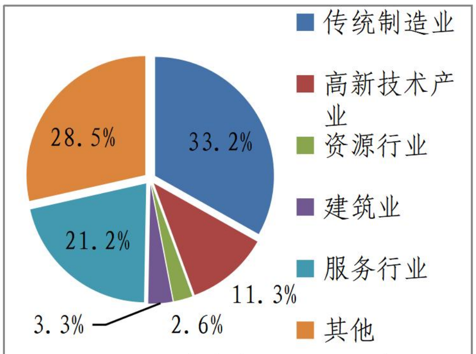


图0-2 受访企业行业分布

33.2%的受访企业来自传统制造业；21.2%来自服务行业；11.3%来自高新技术产业；3.3%来自建筑业；2.6%来自资源行业；29.6%来自其他行业。

（三）小微企业占比近七成

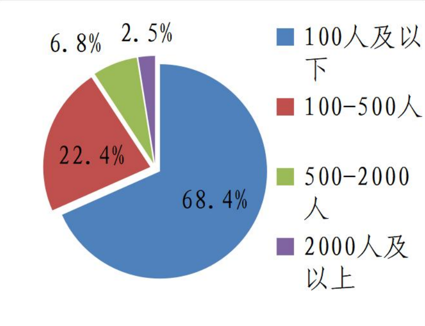


图0-3 受访企业规模分布

68.4%的受访企业规模在 100 人及以下，属小微企业；22.4%规模在 100—500 人；6.8%规模在 500—2000 人；2.5%规模在 2000 人及以上，属超大型企业。

（四）近七成受访企业持续经营超五年

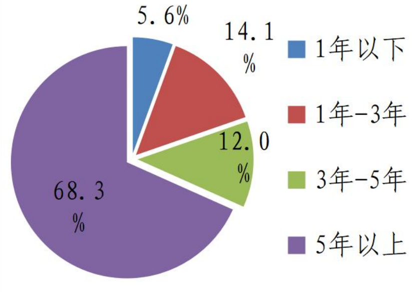


图0-4 受访企业持续经营时间

5.6%的受访企业为开办不足一年的新企业；14.1%连续经营 1—3 年；12%连续经营 3—5 年；68.3%经营时间在 5 年以上。

五、主要结论

（一）2022 年企业对中国营商环境整体评价良好

当前，世界形势更趋复杂严峻和不确定，中国发展面临的风险挑战明显增多。2022 年，党中央和国务院统筹疫情防控和经济社会发展，统筹发展和安全，继续做好“六稳”“六保”工作，持续改善民生，着力稳定宏观经济大盘，保持经济运行在合理区间。

2022 年中国营商环境评价为 4.38 分，与 2021 年持平。在 12 个一级指标中，6 个指标评价较 2021 年有所提高，1 个持平，5 个下降。其中，社会信用环境评价最高，其次是财税服务环境、社会法治环境、海关服务环境和公平竞争环境；金融服务环境、人力资源环境评价相对较低。中部地区、中外合资合作企业及资源行业评价较高。双循环新格局和”一带一路“高质量发展为西部地区带来了巨大发展机遇，在政府、有关服务机构以及广大企业的共同努力下，2022 年中国西部地区营商环境评价提升显著。

2022 年，新冠疫情影响持续扩大，近九成企业受到疫情不同程度消极影响，收入同比增长的企业较 2021 年降低 13.2 个百分点。47%的企业反映供应链受影响，半数已采取或可能采取缩减开支、调整经营策略的措施应对疫情冲击。尽管生产经营面临诸多困难，但仅有 7%的企业对未来发展持“悲观”态度。为尽可能减少疫情影响，超六成企业希政府能提供疫情补贴和加大税收减免力度，帮助企业度过难关。

与此同时，2022 年有超七成企业实现收入增长。“利用本地资源”和“开拓市场”是企业本年度开展投资的主因。“成本提高”和“市场竞争激烈”是企业生产经营中遇到的主要问题。企业盼政府进一步优化政策政务环境，引进上下游配套和商贸物流企业，助力企业恢复生产经营秩序。

（二）中国营商环境持续优化

一是营商环境创新改革“从点到面”。2022年10月，党中央国务院决定在全国范围内复制推广一批营商环境创新试点改革举措，“从点到面”扩大改革效果，推动全国营商环境整体改善。

二是法治化营商环境日趋完善。2022年，各立法、司法、执法机关多措并举，从完善法律体系、提高知识产权保护水平，维护市场公平与健康发展等方面推进法治化营商环境建设。

三是全国统一大市场逐渐形成。2022年4月，党中央国务院提出加快建设全国统一大市场。各地各部门出台了相关规范措施，跨区跨部门的制度性交易成本逐渐降低，市场壁垒逐步打破。

四是外资企业在华投资信心不断增强。稳外资是扩大对外开放的重要抓手，党中央国务院先后出台多项文件政策帮助外资企业纾难解困。此外，贸促会设立服务外资企业工作专班，进一步坚定外企扎根中国信心底气。

五是全方位助力科技创新。习近平总书记指出，科技是第一生产力，创新是第一动力。2022年，中国加强顶层制度创新引领，健全科技成果转化机，提高财税扶持力度，不断激活企业创新活力。

第一章　中国营商环境总体评价

调查问卷显示，受访企业对2022年中国营商环境整体评分为4.38分，与2021年持平。[①]四成以上受访企业对中国营商环境“非常满意”，超六成认为近三年营商环境有所改善。

一、营商环境评价总体良好

（一）四成以上受访企业对营商环境“非常满意”

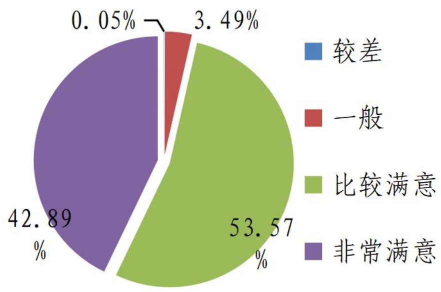


图1-1　营商环境满意度

受访企业对中国营商环境总体满意度较高，评价“非常满意”的占42.89%；“比较满意”的占53.57%；“一般”的占3.49%；仅0.05%认为中国营商环境“较差”。

（二）六成受访企业认为近三年营商环境有所改善

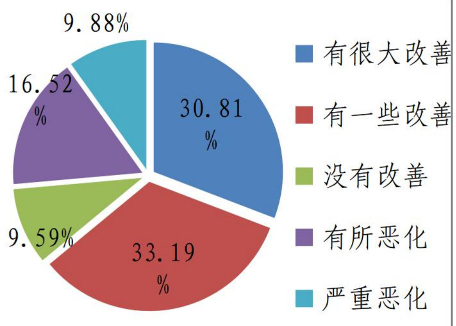


图1-2　三年来中国营商环境改善情况

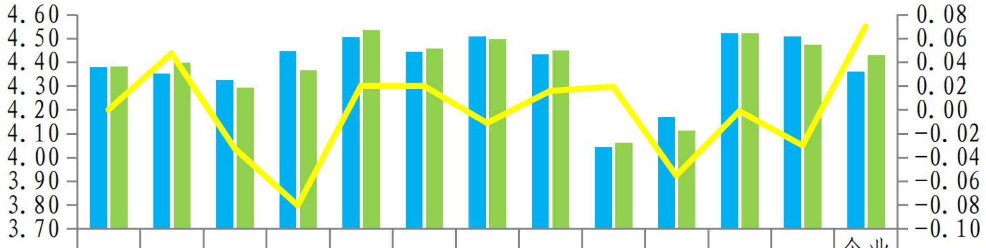
认为近三年中国营商环境“有很大改善”的受访企业占30.81%；认为“有一些改善”的占33.19%; 9.59%认为“没有改善”；26.4%认为“恶化”（包括“严重恶化”和“有所恶化”），该比例高于2021年（6.2%）。

（三）受访企业对中国营商环境整体评价“良好”，社会信用指标评价最高

受访企业对2022年中国营商环境评价为4.38分，与2021年持平，达到良好水平。其中，社会信用指标评价最高，为4.53分；财

[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2022年度中国贸促会组织的营商环境企业问卷调查。

税服务（4.52 分）和社会法治（4.50 分）指标评价达到优秀水平。人力资源指标评价最低，为 4.06 分，其次是金融服务指标，为 4.11 分。



	营商环境	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
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
2022年	4.38	4.40	4.30	4.37	4.53	4.46	4.50	4.45	4.06	4.11	4.52	4.48	4.43
差值	0.00	0.05	-0.03	-0.08	0.02	0.02	-0.01	0.02	0.02	-0.06	0.00	-0.03	0.07

图1-3 营商环境评价年度对比

受访企业对 2022 年中国营商环境整体评价与 2021 年持平。12 个一级指标中，6 个指标评价有所提高，其中企业设立和退出指标评价提高幅度最大，为 0.07 分；其次是基础设施（提高 0.05 分）和社会信用（提高 0.02 分）指标；科技创新、人力资源指标评价均提高 0.02 分；财税服务指标评价与 2021 年持平。

二、中部地区评价最高，西部地区评价提升多

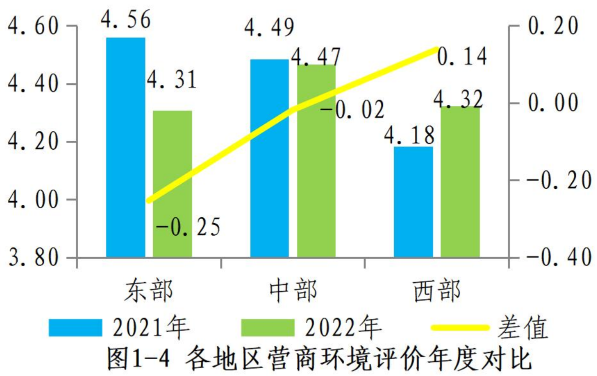


图1-4 各地区营商环境评价年度对比

分地区来看，中部地区受访企业营商环境评价最高（4.47 分）；西部地区评价居中（4.32 分）；东部地区评价最低（4.31 分）。

与 2021 年相比，2022 年西部地区营商环境评价提高 0.14 分；东部、中部地区受到新冠疫情等客观因素影响较大，营商环境评价负增长，分别下降 0.25 分、0.02 分。

三、中外合资合作企业评价最高，私营企业评价最低

分所有制看，中外合资合作企业对中国营商环境评价最高，为

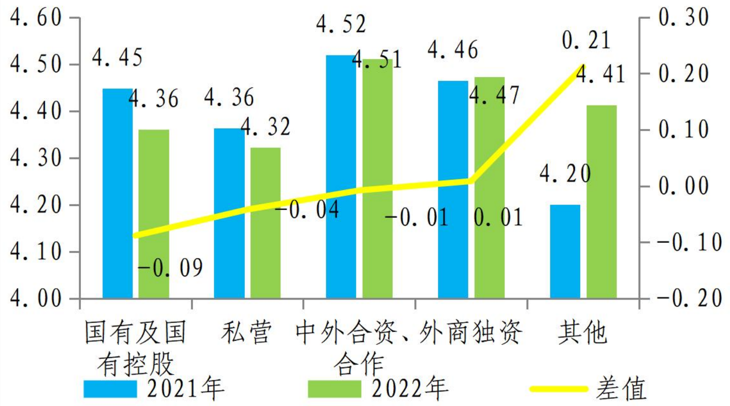


图1-5 不同所有制企业营商环境评价年度对比

4.51 分；私营企业评价最低，为 4.32 分。外商独资企业、其他所有制企业和国有企业评价居中，分别为 4.47 分、4.41 分和 4.36 分。

与 2021 年相比，2022 年其他所有制企业评价提高 0.21 分；其次是外商独资企业（提高 0.01 分）；国有企业、私营企业和中外合资合作企业评价有所下降，分别降低 0.09 分、0.04 分和 0.01 分。

四、资源行业评价最高，高新技术产业评价最低

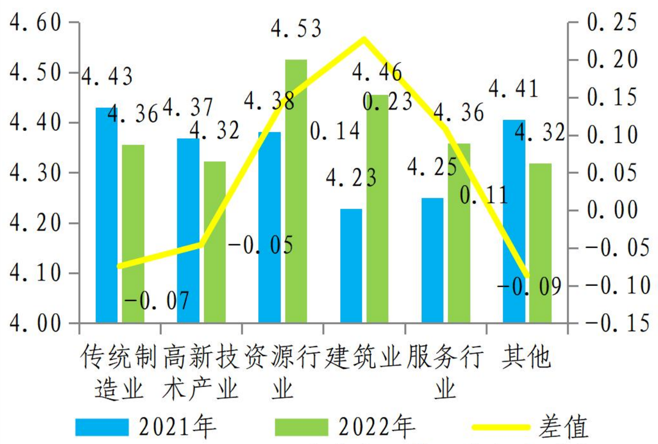


图1-6 不同行业营商环境评价年度对比

分行业看，资源行业对中国营商环境评价最高，为 4.53 分；其次是建筑行业，为 4.46 分；高新技术行业和其他行业评价最低，均为 4.32 分；传统制造业和服务行业评价居中，均为 4.36 分。

与 2021 年相比，2022 年建筑行业对中国营商环境评价提高最多（提高 0.23 分）；其次是资源行业和服务行业，分别提高 0.14 分和 0.11 分；其他行业对中国营商环境评价下降较多（降低 0.09 分）；传统制造业和高新技术产业对营商环境评价分别降低 0.07 分和 0.05 分。

第二章　营商环境细分指标评价

中国营商环境指标评价体系主要包括基础设施、政策政务、社会信用、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，2022 年受访企业对中国营商环境总体评价良好，6 个一级指标评价较 2021 年有所提升。

一、基础设施：环保设施评价高，中部地区评价提升

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。2022 年受访企业对基础设施环境评价为 4.40 分，较 2021 年提高 0.05 分，在 12 个一级指标中排名第 8。

（一）环保设施评价高，交通运输指标评价低

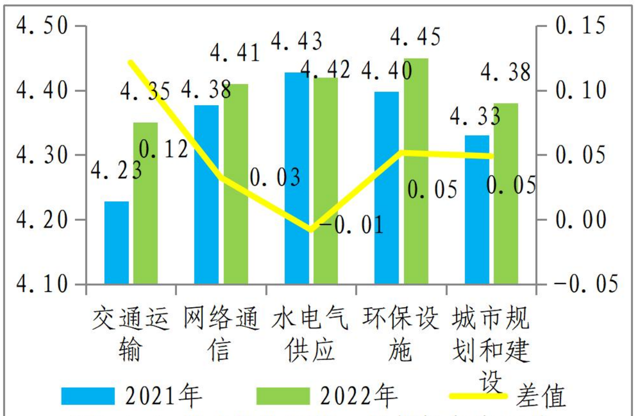


图2-1-1 基础设施环境二级指标年度评价对比

从二级指标看，环保设施指标评价最高（4.45 分），其次是水电气供应（4.42 分）；交通运输指标评价最低，为 4.35 分；网络通信、城市规划和建设评价居中，分别为 4.41 分和 4.38 分。

与 2021 年相比，交通运输指标评价提升最多（0.12 分），其次是城市规划、建设与环保设施指标，评价均提高 0.05 分；网络通信指标评价增长 0.03 分；水电气供应评价下降 0.01 分，是基础设施环境指标中唯一出现负增长的二级指标。

（二）中部地区评价高，东部地区评价负增长

分地区看，中部地区对基础设施指标评价最高，为 4.52 分，较 2021 年提高 0.08 分；西部地区为 4.46 分，较 2021 年提高 0.31 分；东部地区评价为 4.43 分，较 2021 年下降 0.1 分。

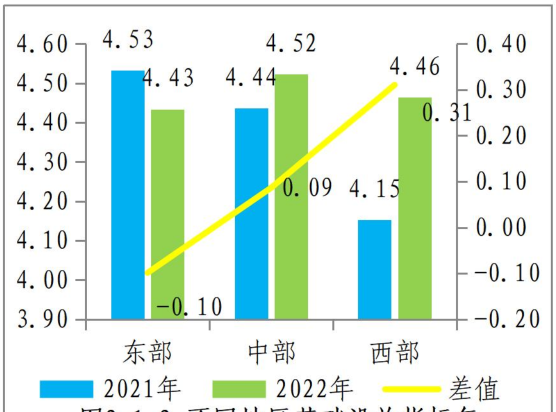


图2-1-2 不同地区基础设施指标年度评价对比

（三）中外合资合作企业评价较高，私营企业评价较低

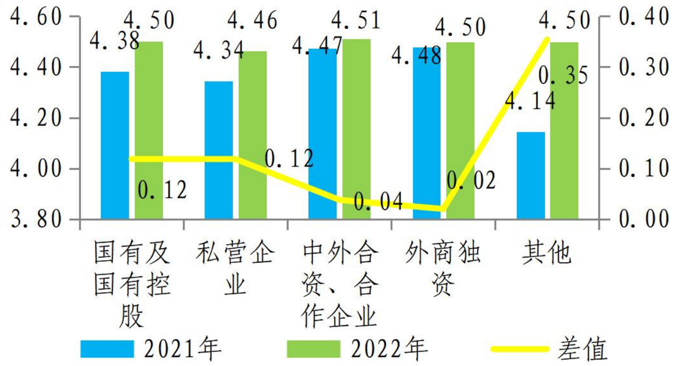


图2-1-3 不同所有制企业基础设施指标年度评价对比

不同所有制企业对基础设施环境评价有一定差异。其中，中外合资合作企业（4.51 分）评价最高；国有企业、外商独资企业、其他企业评价居中，均为 4.50 分；私营企业评价最低（4.46 分）。

与 2021 年相比，其他所有制企业评价提升最多（提高 0.36 分），其次是私营企业和国有企业，均提高 0.12 分。外商独资企业和中外合资合作企业评价有所提升，分别提高 0.02 分和 0.04 分。

（四）资源行业评价较高，高新技术产业评价较低

分行业看，资源行业对基础设施环境评价最高，为 4.63 分；其次是建筑行业，评价为 4.57 分；

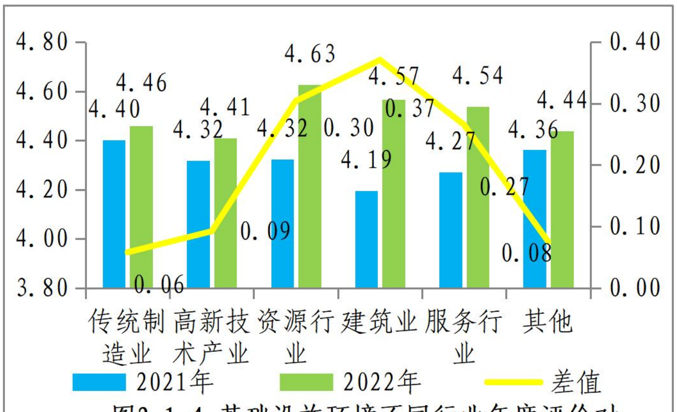


图2-1-4 基础设施环境不同行业年度评价对比

高新技术产业评价最低，为 4.41 分；服务行业、传统制造业和其他行业评价居中，分别为 4.54 分、4.46 分和 4.44 分。

与 2021 年相比，2022 年建筑行业和资源行业评价提升明显，分别提高 0.37 分和 0.30 分；其次是服务行业（提高 0.27 分）；高新技术产业、其他行业和传统制造业评价略有提升，分别提高 0.09 分、0.08 分、0.06 分。

二、生活服务：环境保护获好评，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。2022 年受访企业对生活服务环境总体评价为 4.30 分，较 2021 年提高 0.05 分，在 12 个一级指标中排名第 10。

（一）环境保护指标评价最高，文体设施指标评价较低

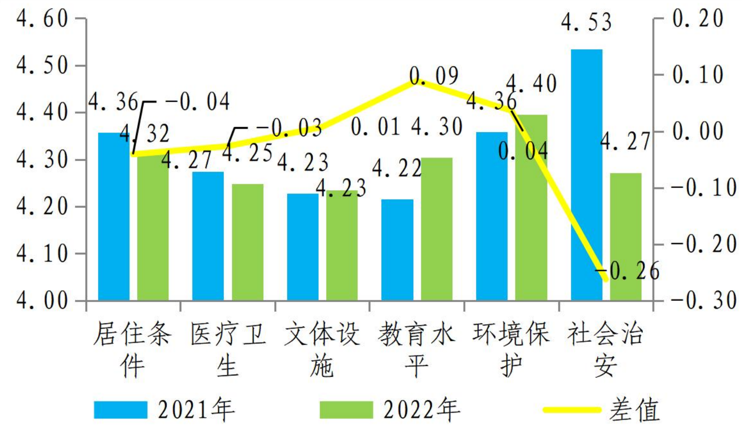


图2-2-1 生活服务环境二级指标年度评价

从二级指标来看，环境保护评分最高，为 4.40 分；文体设施指标评分最低，为 4.23 分；居住条件、教育水平、社会治安、医疗卫生评价分别为 4.32 分、4.30 分、4.27 分、4.25 分。

与 2021 年相比，教育水平评价提升最多（提高 0.09 分）；环境保护评价提升 0.04 分；文体设施评价持平；社会治安、居住条件和医疗卫生评价均出现负增长，分别降低 0.26 分、0.04 分和 0.03 分。

（二）中部地区评价高，东部地区评价较低

分地区看，中部地区对生活服务环境评价较高(4.35分)，但较2021年下降0.08分;西部地区评价为4.31分，较2021年提高0.17分;东部地区评价负增长，较2021年下降0.26分，仅4.21分。

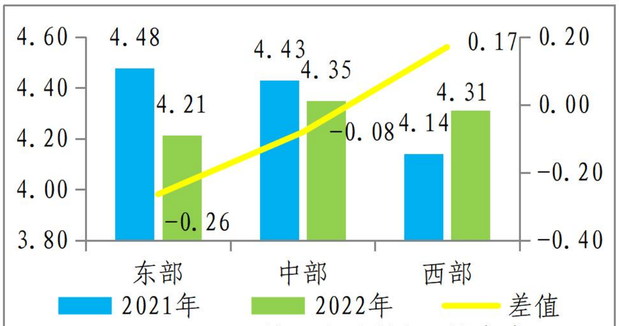


图2-2-2 不同地区生活服务环境年度评价对比图

（三）其他制企业评价较高，国有及国有控股制企业评价较低

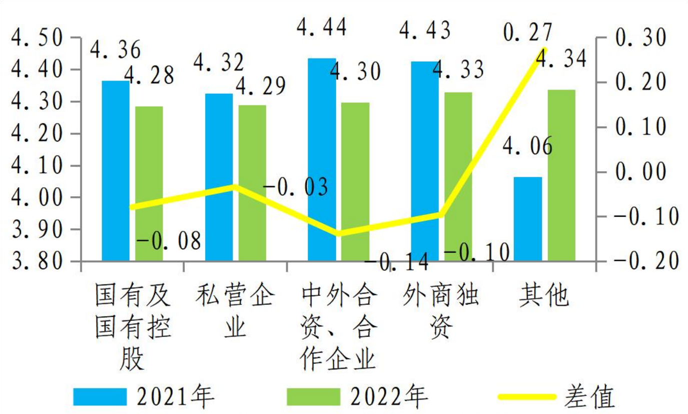


图2-2-3 不同所有制企业生活服务环境年度评价对比图

从所有制角度看，其他所有制企业对生活服务环境评价最高（4.44分）；外商独资企业评价较高（4.33分）、中外合资合作企业（4.30分）和私营企业（4.29分）评价居中；国有企业评价最低（4.28分）。

与2021年相比，其他所有制企业对生活服务环境评价提升最多（提高0.27分）。中外合资合作企业、外商独资企业、国有企业和私营企业评价均负增长，分别降低0.14分、0.10分、0.08分和0.03分。

（四）建筑业评价较高，高新技术行业评价较低

分行业看，建筑业对生活服务环境评价价最高，为4.47分；其次是资源行业，评价为4.41分；高新技术产业评价最低，为4.24分；服务行业、传统制造业和其他行业评价居中，分别为4.37分、4.28分和4.25分。

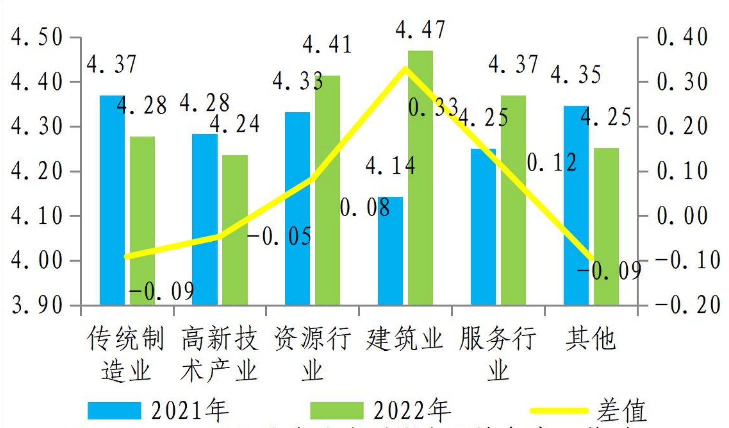


图2-2-4 不同行业企业生活服务环境年度评价对比图

与 2021 年相比，建筑行业和服务行业评价提升较多，分别为 0.33 分和 0.12 分；资源行业评价略有上升（提高 0.08 分）；传统制造业、其他行业和高新技术行业评价有所下降，分别降低 0.09 分、0.09 分和 0.05 分。

三、政策政务：官员廉洁程度评价最高，西部评价提升多

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。2022 年受访企业对政策政务环境评价为 4.37 分，较 2021 年降低 0.08 分，在 12 个一级指标中排名第 9。

（一）官员廉洁程度指标评价最高，政策执行力度指标评价较低

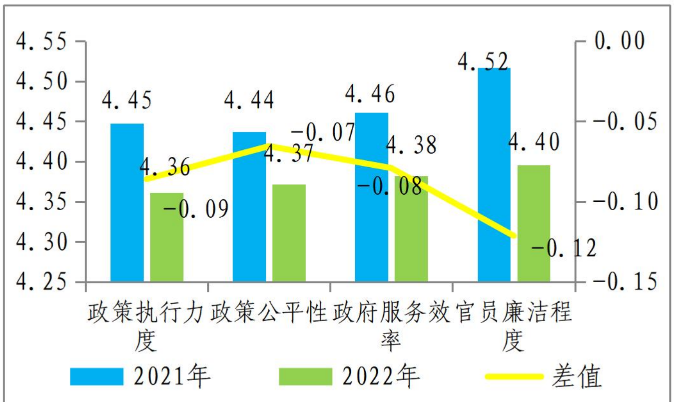


图2-3-1 政策政务环境二级指标评价

从二级指标看，官员廉洁程度得分最高，为 4.40 分，达到优秀水平；其次是政府服务效率指标，（4.38 分）；政策执行力度和政策公平性评价也较好，分别为 4.36 分、4.37 分。

与 2021 年相比，2022 年四个二级指标评价均有下降，政策公平性指标下降最少（降低 0.07 分）；其次是政府服务效率指标，降低 0.08 分；官员廉洁程度和政策执行力度分别降低 0.12 分和 0.09 分。

（二）中部地区评价最高，东部地区评价负增长

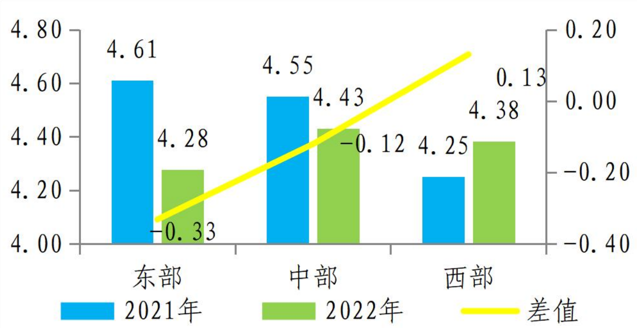


图2-3-2 不同地区对政策政务环境年度评价对比图

分地区看，中部地区对政策政务环境评价最高，为4.43分,较上年降低0.12分;西部地区评价为4.38分，较上年提高最多（提高0.13分）；东部地区评价仅4.28分，较上年下降0. 33分。

（三）外商独资、其他所有制企业评价较高，国有企业评价较低

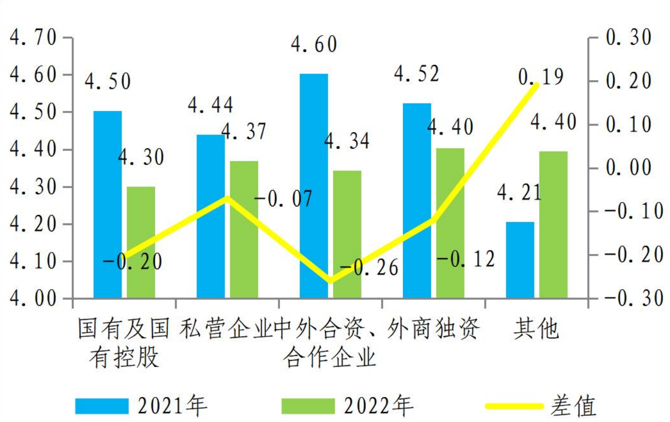


图2-3-3 不同所有制企业对政策政务环境年度评价对比图

从所有制角度看，外商独资企业和其他所有制企业评价最高，均为4.40分。私营企业（4.37分）和中外合资合作企业（4.34分）评价较高，国有企业评分最低仅4.30分。

与2021年相比，其它所有制企业评价提高0.19分，私营企业评价降低0.07分，外商独资企业、国有企业评价分别降低0.12分、0.20分，中外合资合作企业评价下降较多，较2021年降低0.26分。

（四）资源行业评价较高，多行业评价负增长

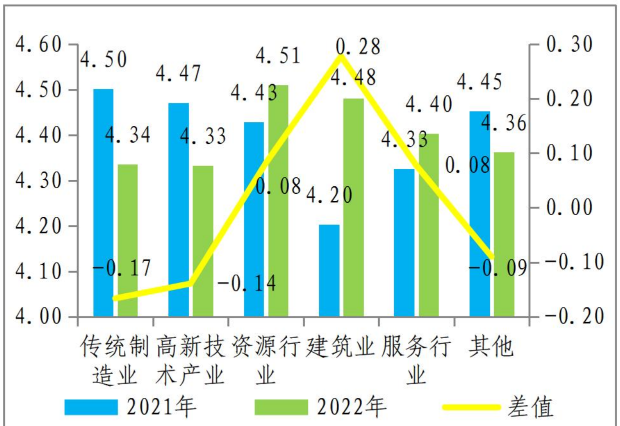


图2-3-4 不同行业对政策政务环境年度评价对比图

分行业看，资源行业对政策政务环境评价分值最高，为4.51分；其次是建筑业，为4.48分；高新技术产业评价最低，为4.33分；服务行业、其他行业和传统制造业

三个行业评价居中，分别为 4.40 分、4.36 分和 4.34 分。

与 2021 年相比，2022 年建筑业对政策政务环境评价提升较多，提高 0.28 分；资源行业、服务行业评价略有提升，均比上年提高 0.08 分；传统制造业、高新技术产业和其他行业评价负增长，分别降低 0.17 分、0.14 分和 0.09 分。

四、社会信用：指标评价第一，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。2022 年受访企业对社会信用环境评价总体较好（4.53 分），在 12 个一级指标中排名第 1 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

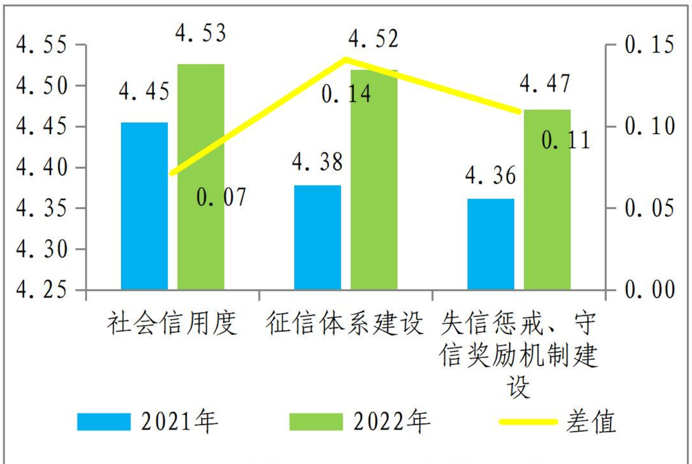


图2-4-1 社会信用环境二级指标评价

从二级指标看，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 2021 年相比，2022 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）西部地区提升多，东部地区评价负增长

分地区看，中部地区对社会信用环境评价最高，为 4.59 分，较上年提高 0.01 分；西部地区较

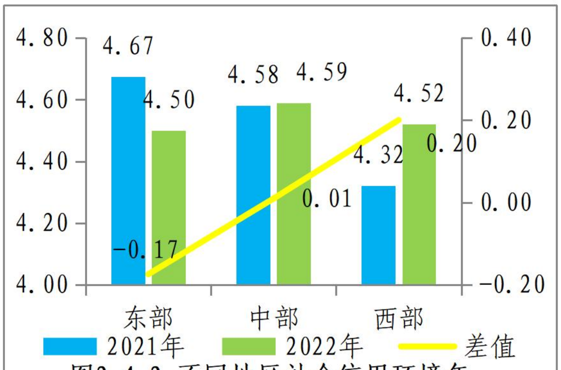


图2-4-2 不同地区社会信用环境年度评价对比图

上年提高最多，评价为 4.52 分，提高 0.20 分；东部地区评价负增长，较上年下降 0. 17 分，仅 4.50 分。

（三）中外合资合作企业评价最高，私营企业评价居中

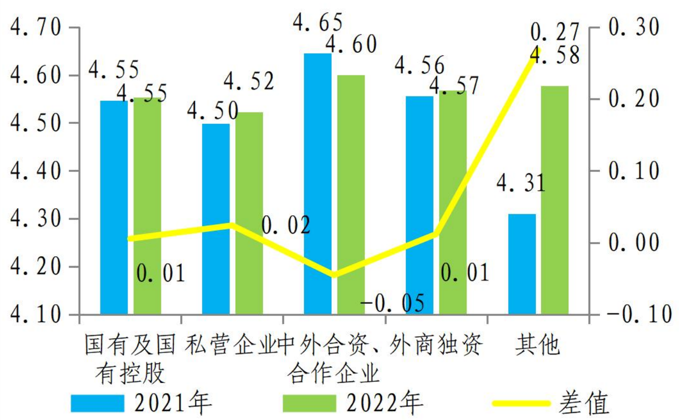


图2-4-3 不同所有制企业社会信用环境年度评价对比图

从所有制角度看，中外合资合作企业(4.60 分）评价最高；其次是其他所有制企业（4.58 分）和外商独资企业（4.57 分）；私营企业评分最低（4.52 分），国有企业评价居中（4.55 分）。

与 2021 年相比，其他所有制企业评价提升最多（提高 0.27 分），私营企业、国有企业和外商独资企业评价亦有所提高，分别提升 0.02 分、0.01 分和 0.01 分。中外合资合作企业评价负增长，降低 0.05 分。

（四）建筑业评价明显提高，三行业评价负增长

图2-4-4 不同行业企业社会信用环境年度评价对比图

分行业看，建筑业对社会信用环境评价最高，为 4.65 分；其次是资源行业和服务行业，评价分别为 4.62 分和 4.57 分；高新技术产业评价最低，为 4.49 分；传统制造业和其他行业评分居中，分别为 4.53 分和 4.51 分。

与 2021 年相比，2022 年建筑业和服务行业评价提升明显，分别提高 0.39 分和 0.22 分；资源行业评价略有提升，比上年提高 0.15 分；

传统制造业、高新技术产业和其他行业评价出现下降，分别降低 0.02 分、0.03 分和 0.04 分。

五、公平竞争：市场监管评价高，二级指标评价均提升

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 4.46 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

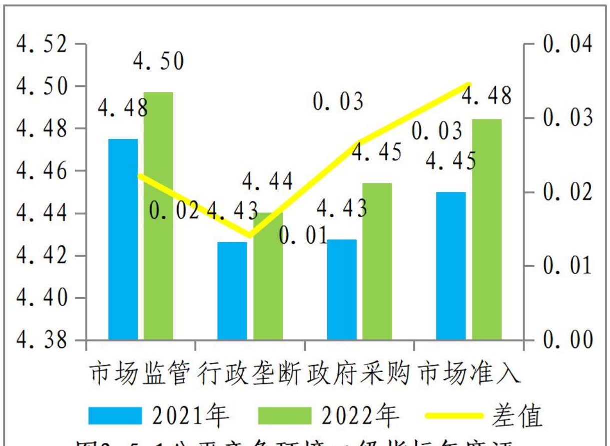


图2-5-1公平竞争环境二级指标年度评价

从二级指标看，市场监管得分最高，为 4.50 分；市场准入得分居中，为 4.48 分；政府采购和行政垄断得分较低，分别为 4.45 分、4.44 分。

与 2021 年相比，政府采购和市场准入指标评价提升最多（0.03 分）；其次是市场监管，提高 0.02 分；行政垄断评价提高 0.01 分。

（二）中部地区评价高，西部地区评价提升多

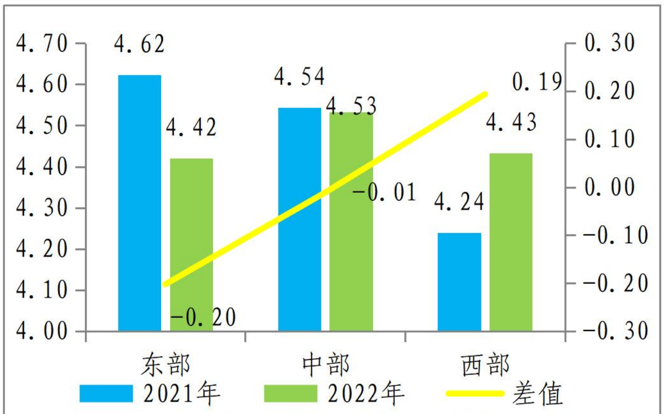


图2-5-2 不同地区公平竞争环境年度评价对比图

中部地区对公平竞争环境评价最高，为 4.53 分，较上年降低 0.01 分；西部地区评价较上年提高最多（提高 0.19 分），评价为 4.43 分；东部地区评价负增长，较上年下降 0. 20 分，仅 4.42 分。

（三）其他所有制企业评价提升多，国有、中外合资合作企业评

价负增长

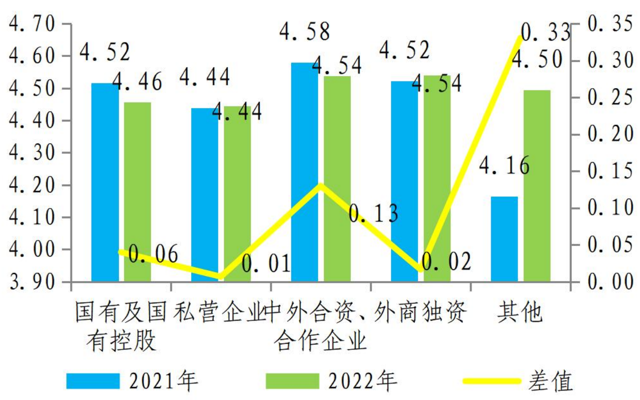


图2-5-3 不同所有制企业公平竞争环境年度评价对比图

从所有制角度看，中外合资合作企业，外商独资企业（4.54 分）评价较高；其次是其他所有制企业（4.50 分）；国有企业和私营企业评价较低，分别为 4.46 分和 4.44 分。

与 2021 年相比，2022 年不同所有制企业对公平竞争环境均有提高。其中，其他所有制企业评价上升最多（提高 0.33 分）；其次是中外合资合作企业，评价提高 0.13 分；国有企业、外商独资和私营企业评价分别提高 0.06 分、0.02 分和 0.01 分。

（四）建筑行业评价提升多，传统制造业、高新技术产业和其他行业评价负增长

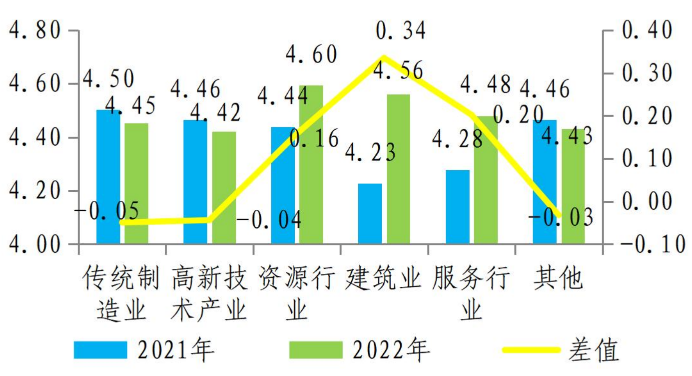


图2-5-4 不同行业企业公平竞争年度评价对比图

分行业看，资源行业对公平竞争环境评价分值最高，为 4.60 分；其次是建筑业和服务行业，分别为 4.56 分和 4.48 分；高新技术产业评分最低，为 4.42 分；传统制造业和其他行业评分居中，分别为 4.45 分和 4.43 分。

与 2021 年相比，2022 年建筑业、服务行业和资源行业评价提升明显，分别提高 0.16 分、0.20 分和 0.34 分；传统制造业、高新技术产业和其他行业评价出现下降，分别降低 0.05 分、0.04 分和 0.03 分。

六、社会法治：法律监督和依法行政评价高，外资企业评价高

社会法治环境可细分为法律监督、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。2022 年，社会法治环境整体评价较好，总得分为 4.50 分，在 12 个一级指标中排名第 3 位。

（一）法律监督得分最高，二级指标多呈负增长

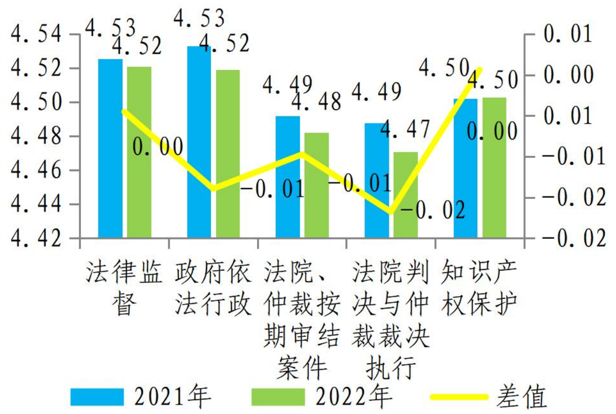


图2-6-1 社会法治环境细分指标年度评价

从二级指标看，法律监督得分最高，为 4.52 分；政府依法行政和知识产权保护得分居中，分别为 4.52 分和 4.50 分；法院、仲裁按期审结案件和法院判决与仲裁裁决执行得分较低，分别为 4.48 分、4.47 分。

与 2021 年相比，法院判决与仲裁指标评价下降最多（降低 0.02 分）；其次是政府依法行政和法院、仲裁按期审结案件，均降低 0.01 分。法律监督和知识产权保护评价与 2021 年持平。

（二）中部地区评价得分高，东部地区评价负增长

分地区看，中部地区对社会法治环境评价最高，为 4.54 分；西部地区评价居中，为 4.49 分；东部地区较低，仅 4.47 分。

与 2021 年相比，西部地区评价提高 0.16 分，中部地区评价降低 0.04 分，东部地区评价降低 0.21 分。

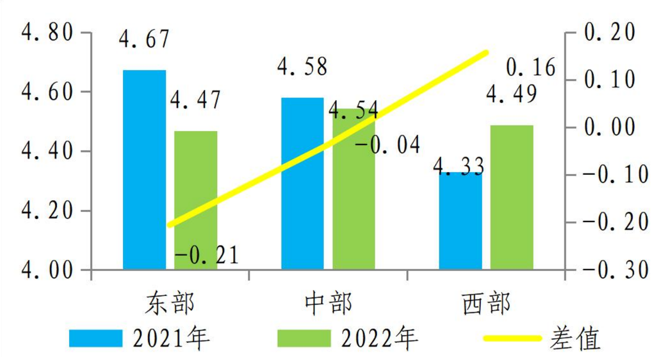


图2-6-2 不同地区社会法治环境年度评价对比图

（三）外商独资企业评价较高，私营企业评价较低

从所有制角度看，外商独资企业（4.56分）评价最高，中外合资合作企业（4.54分）、其他所有制企业（4.54分）评价居中，私营企业（4.49分）、国有企业企业（4.50分）评价较低。

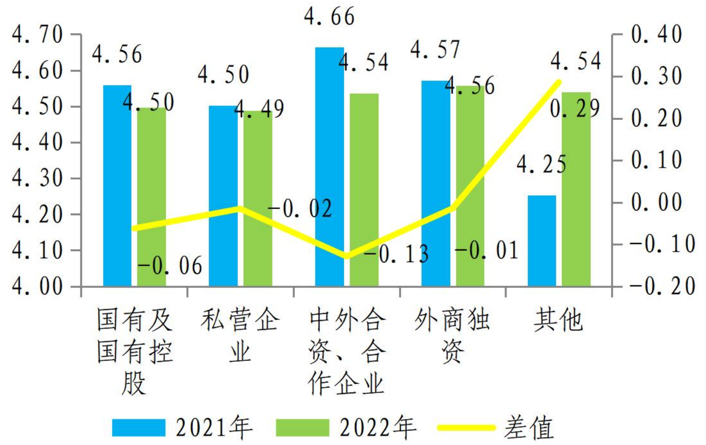


图2-6-3 不同所有制企业社会法治环境年度评价对比图

与2021年相比，其他所有制企业评价提升最多（提高0.29分）。中外合资合作企业、国有企业、私营企业和外商独资企业评价均负增长，分别降低0.13分、0.06分、0.02分和0.01分。

（四）建筑业评价高，高新技术产业评价低

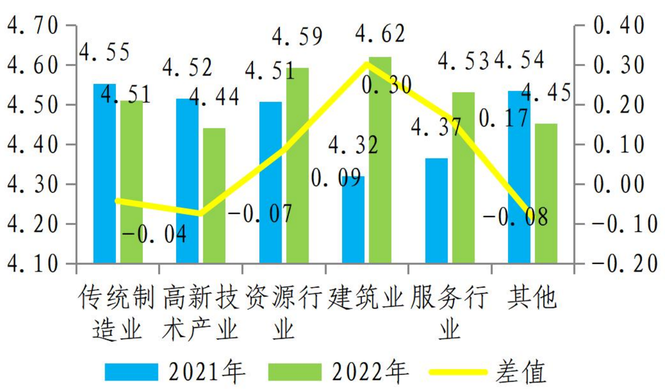


图2-6-4 不同行业企业社会法治环境年度评价对比图

分行业看，建筑业对社会法治环境评价最高，为4.62分；其次是资源行业和服务行业，分别为4.59分和4.53分；高新技术产业评分最低，为4.44分；传统制造业和其他行业评分居中，为4.51分和4.45分。

与2021年相比，建筑业对社会法治环境评价提升最多（提高0.30分），其次是服务行业和资源行业，分别提高0.17分和0.09分。其他行业、高新技术产业和传统制造业企业评价负增长，分别较低0.08分、0.07分和0.04分。

七、科技创新：二级指标评价相近，国有企业评价提升多

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 4.45 分，在 12 个一级指标中排名第 6 位。

（一）二级指标评价相近，研发抵扣政策实施获较高评价

科技创新环境 5 个二级指标得分相近。其中，研发抵扣政策实施得分最高，为 4.47 分；其次是公共服务平台建设，为 4.46 分；知识产权抵押和产学研结合评价稍低，分别为 4.45 分和 4.44 分。

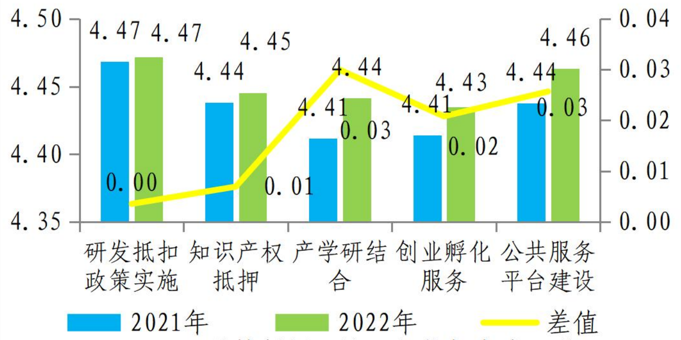


图2-7-1 科技创新环境二级指标年度评价

与 2021 年相比，2022 年产学研结合和公共服务平台建设指标评价提升较多，均提高 0.03 分；其次是创业孵化服务（提高 0.02 分）和知识产权抵押（提高 0.01 分）；研发抵扣政策实施指标评价与 2021 年持平。

（二）西部地区评价提升较大，东中部地区评价负增长

分地区看，中部地区对科技创新环境评价最高，为 4.50 分，西部地区评价（4.44 分）居中，东部地区评价负增长，仅 4.42 分。

与 2021 年相比，西部地区评价提高 0.20 分，中部地区评价降低 0.03 分，东部地区评价降低 0.19 分。

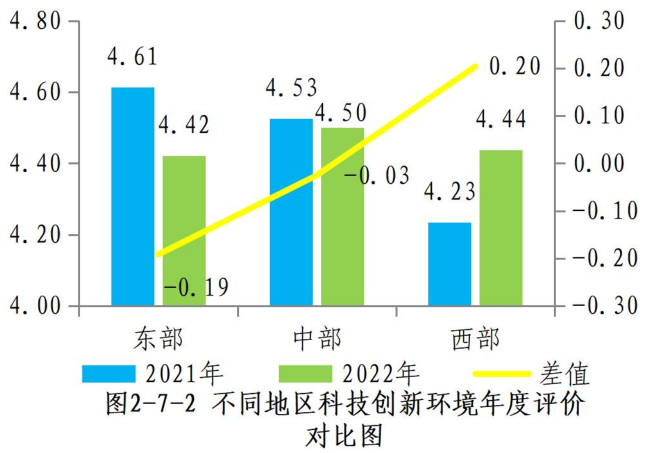


图2-7-2 不同地区科技创新环境年度评价对比图

（三）中外合资合作企业评价最高，其他所有制企业评价低

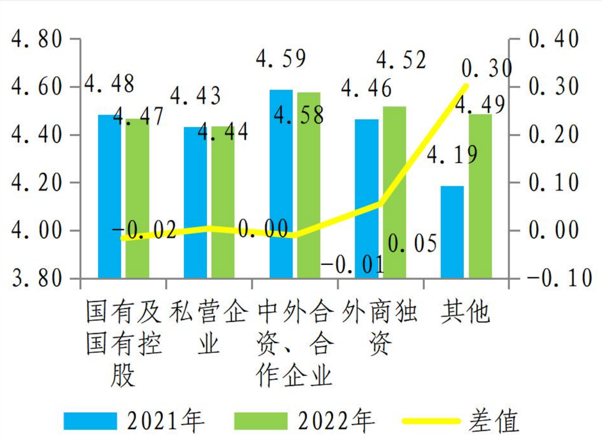


图2-7-3 不同所有制企业科技创新环境年度评价对比图

从所有制角度看，中外合资合作企业对科技创新环境评价最高，为 4.58 分；外商独资企业（4.52 分）、其他所有制企业（4.49 分）和国有企业（4.47 分）评价居中；私营企业（4.44 分）评分最低。

与 2021 年相比，其他所有制企业对科技创新环境评价提升最多（提高 0.30 分），其次是外商独资企业（提高 0.05 分），国有企业及中外合资合作企业评价负增长，分别降低 0.02 分和 0.01 分。私营企业评价与 2021 年持平。

（四）资源行业评价较高，三行业评价降低

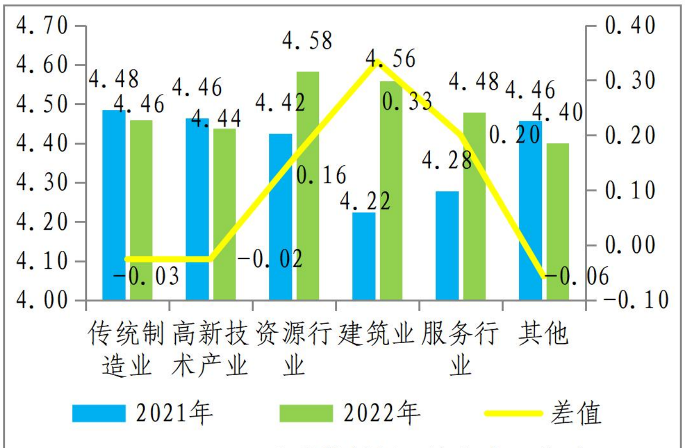


图2-7-4 不同行业科技创新环境年度评价对比图

分行业看，资源行业对科技创新环境评价最高，为 4.58 分；其次是建筑业、服务行业和传统制造业，分别为 4.56 分、4.48 分和 4.46 分；高新技术产业、其他行业评分较低，分别为 4.44 分、4.40 分。

与 2021 年相比，2022 年建筑业、服务行业和资源行业评价提升明显，分别提高 0.33 分、0.20 分和 0.16 分；传统制造业、高新技术产业和其他行业评价负增长，分别降低 0.03 分、0.02 分和 0.06 分。

八、人力资源：评价排名末位，社会专业化人才可获得性评价低

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、创新创业人才资源可得性、社会专业化人才的可获得性 4 个二级指标。2022 年，人力资源环境评价在 12 个一级指标中排名末

位，仅 4.06 分。

（一）熟练劳动力评价较高，创新创业人才资源可得性评价较低

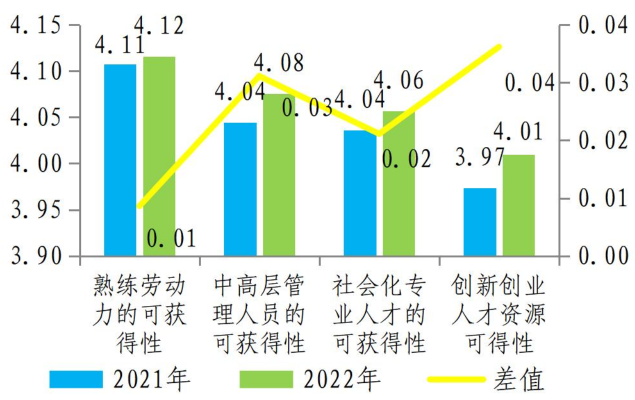


图2-8-1人力资源环境二级指标年度评价

从二级指标看，熟练劳动力的可获得性评价相对较高，为 4.12 分；中高层管理人员的可获得性和社会化专业人才的可获得性评价较低，为 4.08 分和 4.06 分；创新创业人才资源可得性评价最低，仅 4.01 分。

与 2021 年相比，2022 年创新创业人才资源可得性指标（0.04 分）提升最多；中高层管理人员的可获得性（0.03 分）和社会化专业人才的可获得性（0.02 分）有所提升；熟练劳动力的可获得性评价较上年提高 0.01 分。

2022 年，受访企业反映人工成本占总成本比重为 26.75%，较 2021 年提高 0.48 个百分点，人工成本年均上涨 9.46%，较 2021 年提高 1.46 个百分点。

（二）西部地区评价显著提高，东部地区评价最低

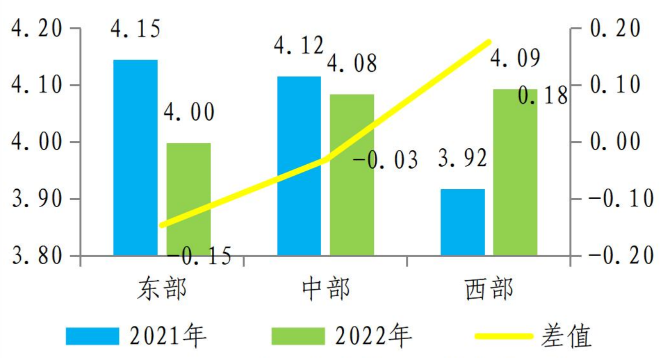


图2-8-2 不同地区人力资源环境年度评价对比图

分地区看，西部地区对人力资源环境评价最高，为 4.09 分，较上年提高 0.18 分；中部地区得分为 4.08 分，降低 0.03 分；东部地区评价负增长，为 4.00 分，较 2021 年下降 0.15 分。

（三）其他所有制企业评价较高，中外合资合作企业评价较低

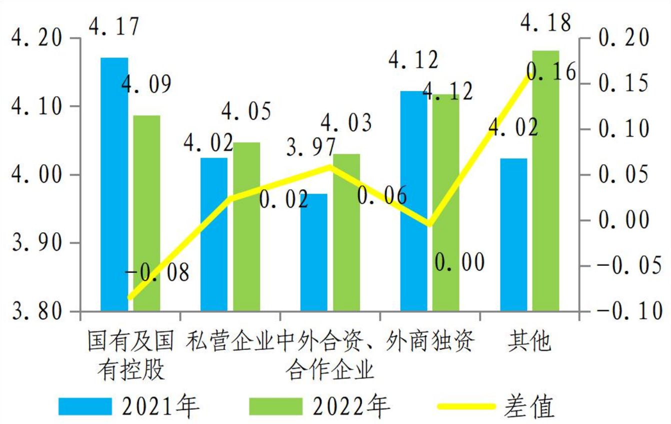


图2-8-3 不同所有制企业人力资源环境年度评价对比图

从所有制角度看，其他所有制企业（4.18 分）评价最高，其次是外商独资企业（4.12 分）；中外合资合作企业评价最低，仅 4.03 分；国有企业和私营企业评价居中，分别为 4.09 分和 4.05 分。

与 2021 年相比，其他所有制企业评价提升最多（提高 0.16 分），其次是中外合资合作企业和私营企业，分别提高 0.06 分和 0.02 分。国有企业评价负增长，降低 0.08 分。外商独资企业评价与 2021 年持平。

（四）建筑业评价最高，高新技术产业评价较低

图2-8-4 不同行业企业人力资源环境年度评

分行业看，建筑业对人力资源环境评价分值最高，为 4.24 分；其次是资源行业，为 4.22 分；高新技术产业评价最低，为 3.90 分；服务行业、传统制造业和其他行业评分居中，分别为 4.15 分、4.03 分和 4.07 分。

与 2021 年相比，2022 年建筑业评价提升较多，提高 0.33 分；传统制造业和服务行业评价有所提升，分别提高 0.06 分和 0.11 分；高新技术产业行业、其他行业和资源行业评价负增长，分别降低 0.04 分、0.04 分和 0.09 分。

九、金融服务：指标排名倒数第二，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。

2022 年，受访企业对金融服务环境总体评价较低，为 4.11 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

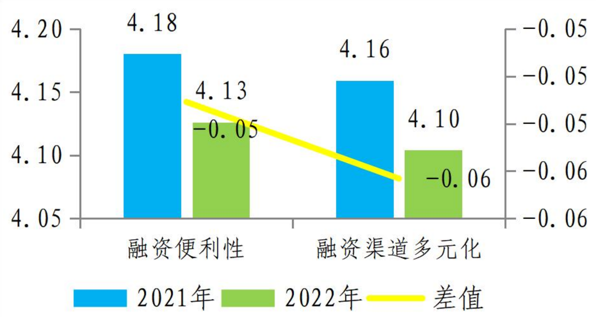


图2-9-1 金融服务环境二级指标年度评价

从二级指标看，融资便利性评分为 4.13 分，融资渠道多元化为 4.10 分。与 2021 年相比，2022 年两指标评价均负增长，其中融资便利性降低 0.05 分，融资渠道多元化降低 0.06 分。

2022 年受访企业融资成本率（融资成本占总成本百分比）为 13.84%，较 2021 年下降 0.11 个百分点。

（二）西部地区评价显著提高，东中部地区评价负增长

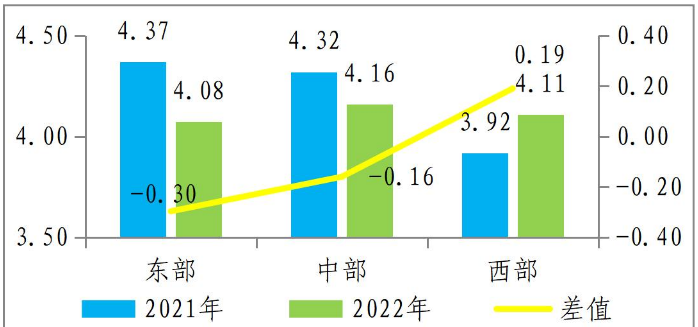


图2-9-2 不同地区金融服务环境年度评价对比图

分地区看，中部地区对金融服务环境评价最高，为 4.16 分，西部地区评价为 4.11 分，东部地区评价仅 4.08 分。

与 2021 年相比，西部地区对金融服务环境评价提升最多（提高 0.19 分），中部和东部地区评价负增长，分别降低 0.30 分和 0.16 分。

（三）外商独资企业评价较高，私营企业评价较低

从所有制角度看，外商独资企业（4.18 分）评价最高；国有企业（4.14 分）、其他所有制企业（4.14 分）和中外合作、合资企业（4.12

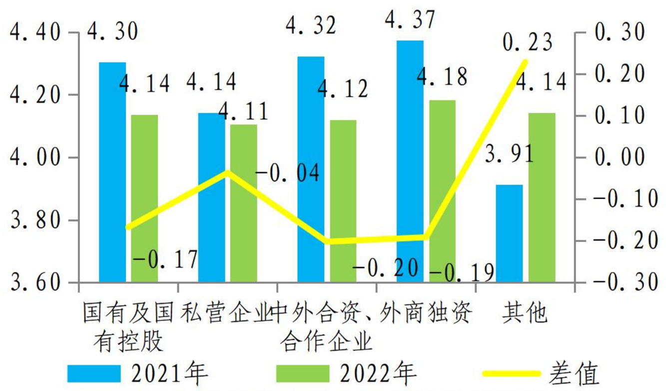


图2-9-3 不同所有制企业金融服务环境年度评价对比图

分）评价居中，私营企业评分最低（4.11分）。

与2021年相比，其他所有制企业评价提升最多（提高0.23分）。中外合资合作企业、外商独资企业、国有企业和私营企业评价均负增长，分别降低0.20分、0.19分、0.17分和0.04分。

（四）建筑业、服务行业评价高，建筑业评价提升多

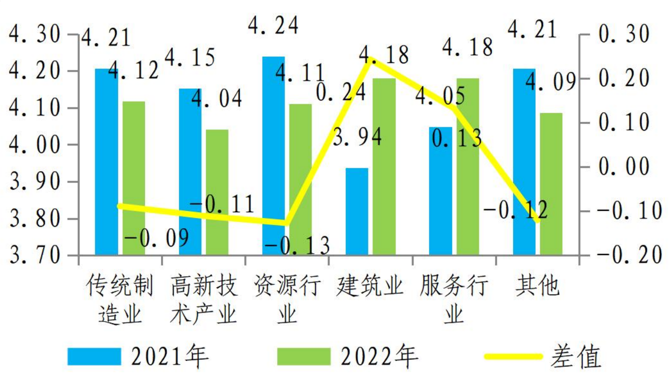


图2-9-4 不同行业企业金融服务环境年度评价对比图

分行业看，建筑业、服务行业对金融服务环境评价最高，均为4.18分；其次是传统制造业和资源行业，分别为4.12分和4.11分；高新技术产业评分最低，为4.04分；资源行业和其他行业评分居中，分别为4.11分和4.09分。

与2021年相比，建筑业、服务行业对金融服务环境评价提升明显，分别提高0.24分和0.13分；资源行业、其他行业、高新技术产业和传统制造业评价负增长，分别降低0.13分、0.12分、0.11分和0.09分。

十、财税服务：总体评价位列第二，二级指标评价优秀

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。2022年企业对财税服务环境（4.52分）总体评分较高，在12个一级指标中位列第二。

（一）二级指标评价均为优秀，但较2021年均有降低

从二级指标看，财税执法规范性得分为4.53分，申退税办理时

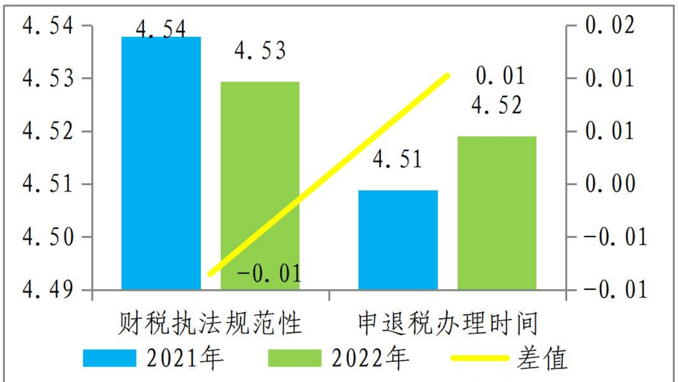


图2-10-1 财税服务环境二级指标

间得分为 4.52 分。

与 2021 年相比，2022 年财税执法规范性评价降低 0.01 分，申退税办理时间上升 0.01 分。

具体来看，2022 年受访企业反映平均税费缴纳次数从 12.55 次降低至 10.34 次；税费缴纳耗时从 7.25 小时上升至 9.37 小时。

（二）西部地区评价显著提高，东部地区评价负增长

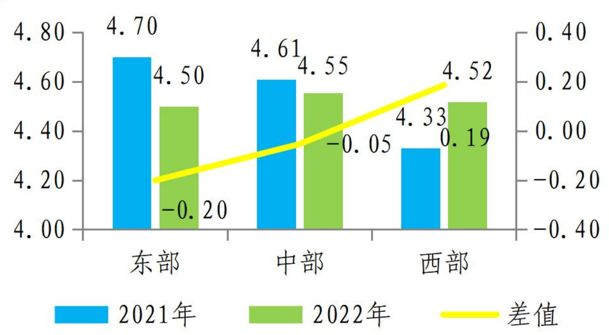


图2-10-2 不同地区财税服务环境年度评价对比图

分地区看，中部地区对财税服务环境评价最高，为 4.55 分；西部地区评价居中，为 4.52 分；东部地区评价较低，为 4.50 分。

与 2021 年相比，西部地区对财税服务环境评价提高 0.19 分。中部和东部地区评价有所下降，分别降低 0.05 分和 0.20 分。

（三）其他企业评价提升多，大部分类型企业评价负增长

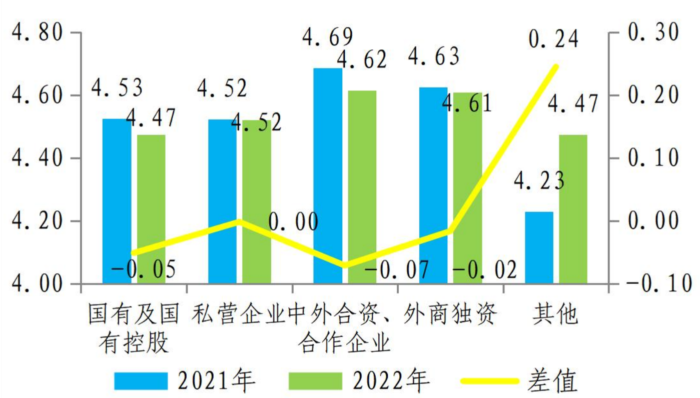


图2-10-3 不同所有制企业财税服务环境年度评价对比图

从所有制角度看，中外合资合作企业（4.62 分）评价最高；外商独资企业(4.61 分)、私营企业（4.52 分）评价居中。国有企业和其他所有制企业评分较低（4.47 分）。

与 2021 年相比，其他所有制企业对财税服务环境年度评价提高 0.24 分，中外合资合作企业、国有企业、外商独资企业评价负增长，分别降低 0.07 分、0.05 分和 0.02 分。私营企业对财税服务环境评价与 2021 年持平。

（四）资源行业评价较高，其他行业评价较低

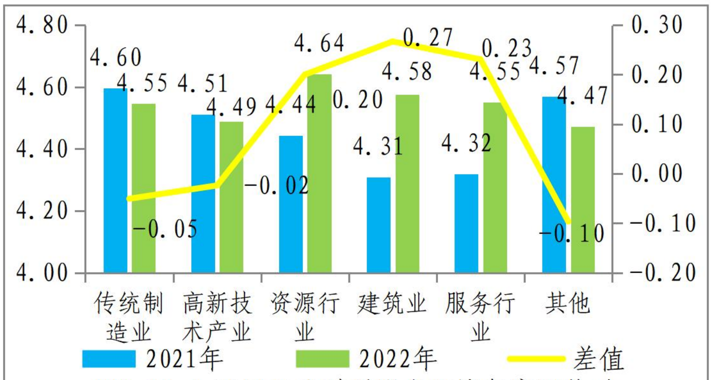


图2-10-4 不同行业财税服务环境年度评价对比图

分行业看，资源行业对财税服务环境评价最高，为 4.64 分；其次是建筑业、服务行业和传统制造业，分别为 4.58 分、4.55 分和 4.55 分；其他行业和高新技术产业评分较低，分别为 4.47 分和 4.49 分。

与 2021 年相比，建筑业和服务行业对财税服务环境评价提升明显，分别提高 0.27 分和 0.23 分；其次是资源行业，提高 0.20 分；其他行业、传统制造业和高新技术产业评价负增长，分别降低 0.10 分、0.05 分和 0.02 分。

十一、海关服务：检验检疫评价高，二级指标评价负增长

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。2022 年，受访企业对海关服务环境评价较高（4.48 分），在 12 个一级指标中排名第 4。

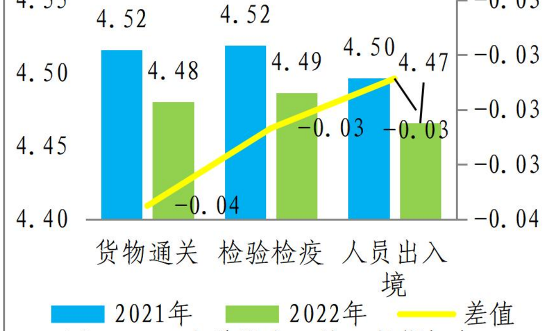


图2-11-1 海关服务环境二级指标年度评价

（一）二级指标均在优秀范畴，指标评价均有所降低

从二级指标看，货物通关和检验检疫评价较高，分别为 4.48 分和 4.49 分；人员出入境评价略低，为 4.47 分。与 2021 年相比，

2022 年各细分评价均有所降低，其中人员出入境和检验检疫情降低 0.03 分；货物通关降低 0.04 分。

（二）中部地区评价最高，西部地区评价显著提高

分地区看，中部地区对海关服务环境评价最高，为 4.55 分，东部地区评价为 4.48 分，西部地区评价为 4.43 分。

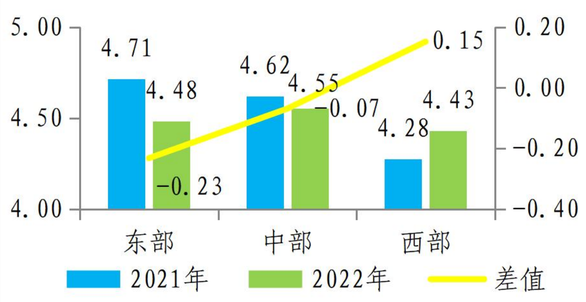


图2-11-2 不同地区海关服务环境年度评价对比图

与 2021 年相比，西部地区对海关服务环境评价提高 0.15 分，中部和东部地区评价负增长，分别降低 0.07 分和 0.23 分。

（三）其他所有制企业评价提升多，部分企业评价负增长

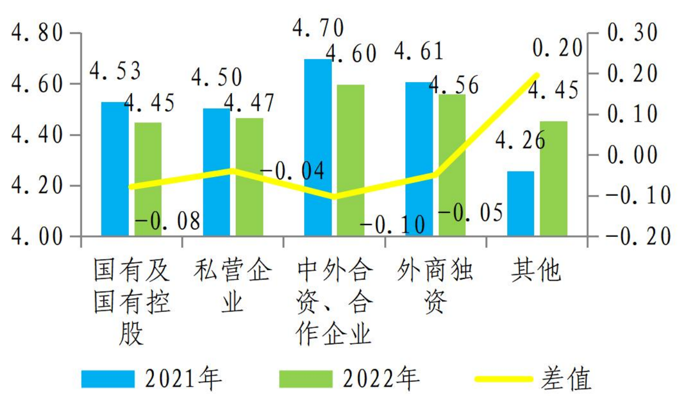


图2-11-3 不同所有制企业海关服务环境年度评价对比图

从所有制角度看，中外合资合作企业（4.60 分）评价最高；外商独资企业（4.56 分）和私营企业（4.47 分）评价居中；其他所有制企业（4.45 分）和国有企业评分较低（4.45 分）。

与 2021 年相比，其他所有制企业对海关服务环境评价提升最多（提高 0.20 分），中外合资合作企业、国有企业、外商独资企业和私营企业评价负增长，分别降低 0.10 分、0.08 分、0.05 分和 0.04 分。

（四）资源行业评价高，三行业评价负增长

分行业看，资源行业和建筑行业对海关服务环境评价较高，分别为 4.56 分和 4.55 分；其次是传统制造业，为 4.53 分；其他行业评分较低，为 4.42 分；服务行业和高新技术产业评分居中，分别为 4.46

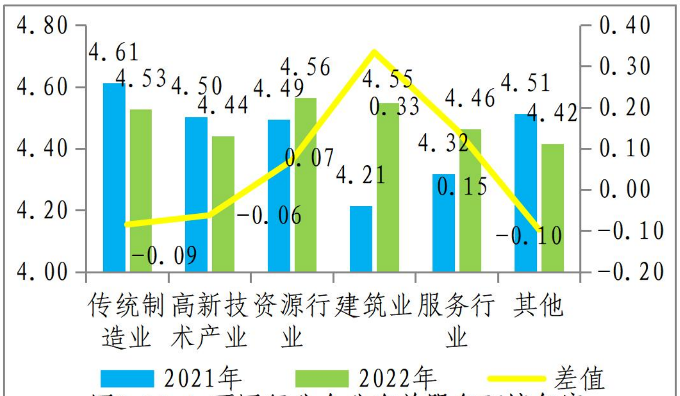


图2-11-4 不同行业企业海关服务环境年度评价对比图

分和 4.44 分。

与 2021 年相比，2022 年建筑业评价提升明显，提高 0.33 分；资源行业和服务行业评价分别提高 0.07 分和 0.15 分；其他行业、传统制造业、高新技术产业评价负增长，分别降低 0.10 分、0.09 分、0.06 分。

十二、企业设立和退出：环保手续评价高，土地获取评价提升多

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于退出环境评价为 4.43 分，在 13 个指标中排名第 8。

（一）环保手续评价较高，土地获取评价较低

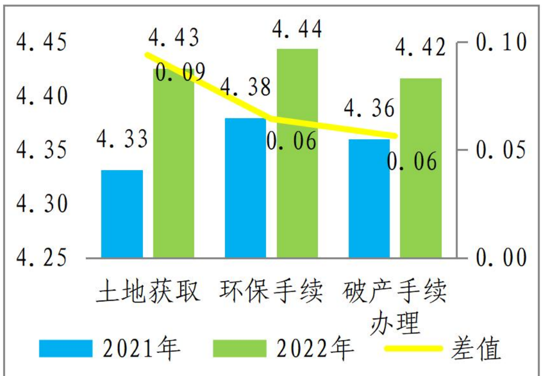


图2-12-1 企业设立和退出环境二级指标年度评价

从二级指标看，环保手续评价最高，为 4.44 分；破产手续办理评价最低，为 4.42 分；土地获取评价居中，为 4.43 分。

与 2021 年相比，2022 年各细分评价均有所提升，其中土地获取评价提高 0.09 分，破产手续办理评价和环保手续评价均提高 0.06 分。

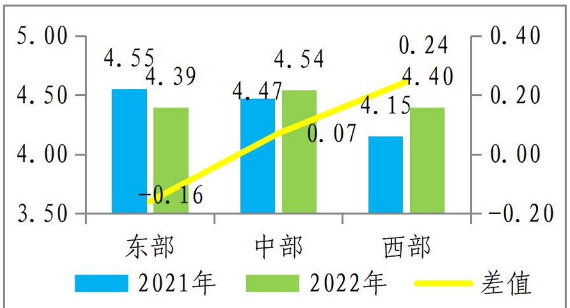


图2-12-2 不同地区企业设立和退出环境年度评价对比图

（二）中、西部地区评价提升，东部评价负增长

分地区看，中部地区对企业设立和退出环境评价最高，为 4.54分，西部地区评价为 4.40分，东部地区评价为 4.39 分。

与 2021 年相比，西部地区对企业设立和退出环境评价提高 0.24 分，中部地区评价提高 0.07 分，东部地区评价负增长，降低 0.16 分。

（三）其他所有制企业评价迅速提升，私营企业评价较低

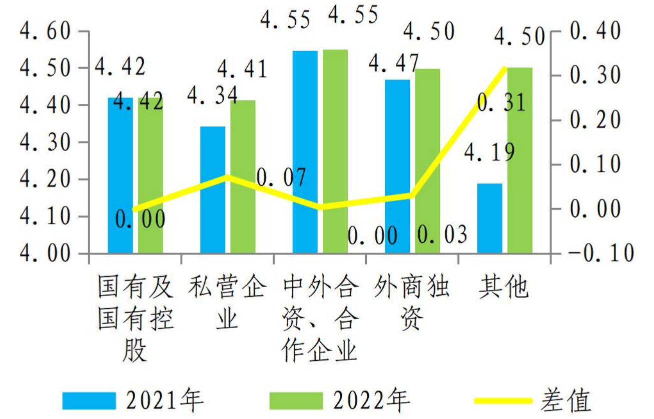


图2-12-3 不同所有制企业对企业设立和退出环境年度评价对比图

从所有制角度看，中外合资合作企业（4.55 分）评价最高，其次是外商独资企业（4.50 分）和其他企业（4.50 分）；私营企业（4.41 分）评分最低；国有企业评价居中，为 4.42 分。

与 2021 年相比，其他企业对企业设立和退出环境评价提升最多（提高 0.31 分），其次是私营股企业（提高 0.07 分）和外商独资企业（提高 0.03 分）。中外合资合作企业和国有企业评价与 2021 年持平。

（四）建筑业评价较高，其他行业评价较低

分行业看，建筑业对企业设立和退出环境评价最高，为 4.60 分其次是资源行业、服务行业、传统制造业和高新技术产业，分别为 4.58 分、4.44 分、4.44 分和 4.41 分；其他行业评分较低，为 4.38 分。

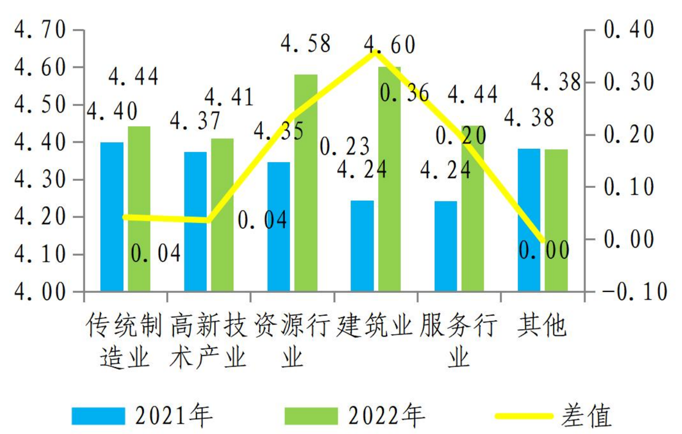


图2-12-4 不同行业企业对企业设立和退出环境年度评价对比图

与 2021 年相比，建筑业对企业设立和退出评价提升明显，提高 0.36 分；其次是服务行业和资源行业评价，分别提高 0.20 分和 0.23

分；传统制造业和高新技术产业评价均提升 0.04 分。其他行业对企业设立和退出环境评价与 2021 年持平。

第三章　企业经营与投资状况

2022 年，近九成受访企业受到疫情不同程度消极影响，东部地区受影响企业占比达 92.1%，76.2%的受访企业收入在一般及以上水平，这一比例较 2021 年降低 13.2 个百分点。利用本地资源和开拓市场是企业投资的主因。受访企业盼政府进一步优化政策政务环境，引进上下游配套企业，对疫情受影响较大的企业进一步提供资金补贴和税费减免。

一、近九成企业受疫情不同程度影响

（一）九成受访企业受疫情消极影响

九成企业受到新冠疫情不同程度的消极影响[①]，其中受“影响较大”的企业占比最高，为 42.7%；受“影响较小”和“影响严重”的企业分别占 31.4%和 14.7%。此外，6.0%的企业反映疫情具有积极影响；5.3%的企业反映未受到影响。

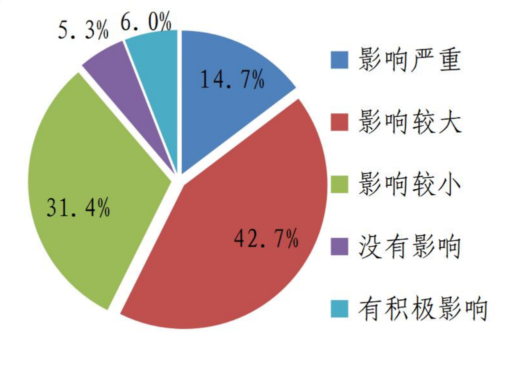


图3-1-1 新冠疫情影响评价

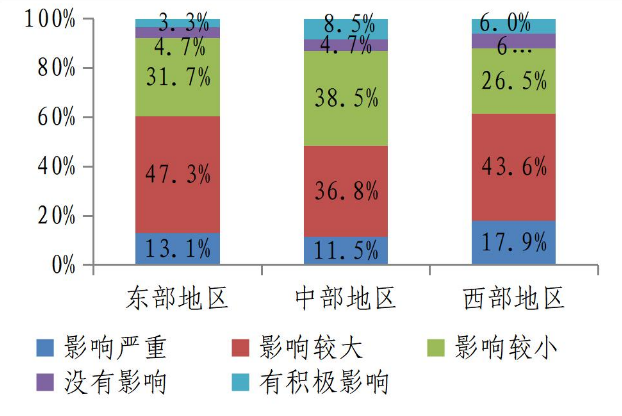


图3-1-2 各地区对新冠疫情影响评价

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八成，东部地区受影响企业占比最高，为 92.1%。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 61.5%；中部地区受“积极影响”和“没有影响”的企业占比最高，为 13.2%。

从不同所有制类型看，其他所有制企业受疫情消极情影响占比较

[①] 注：“影响严重”指 2022 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。

高（89.2%），外商独资企业未受影响或受积极影响占比较高（18.3%）。

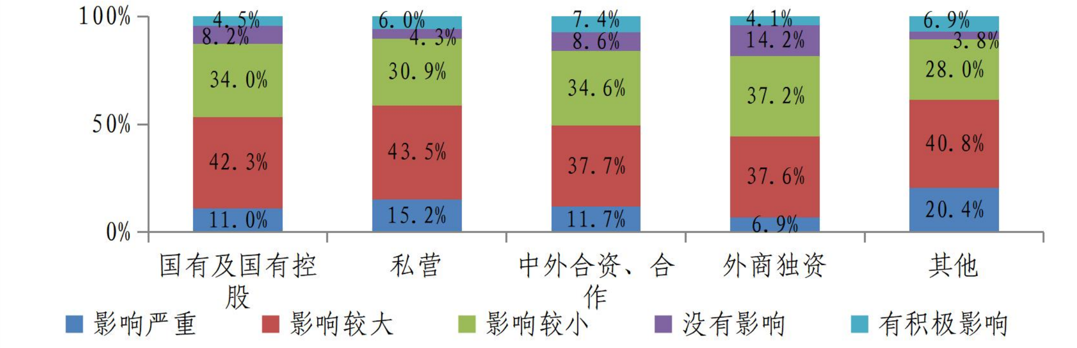


图3-1-3 不同所有制企业对新冠肺炎疫情影响评价图

从不同行业看，服务行业（88.9%）和其他行业（90.3%）受疫情消极影响较大；资源行业未受影响或受积极影响占比较高（14.3%）。

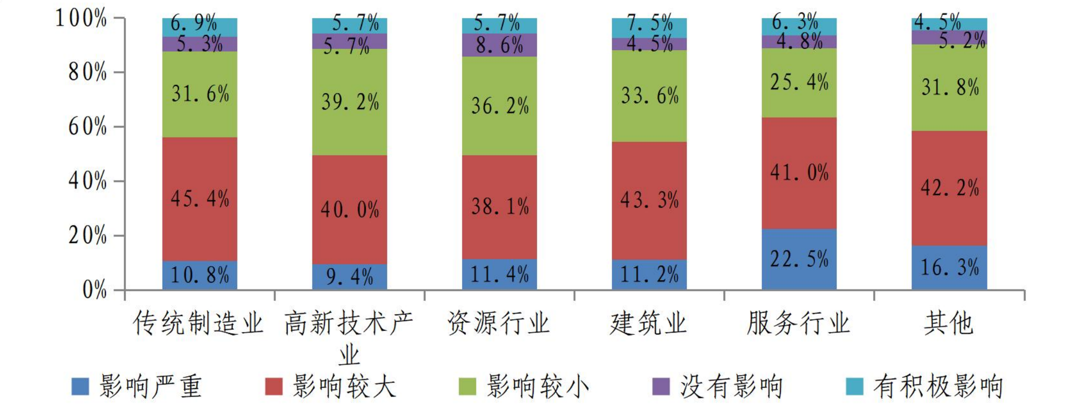


图3-1-4 不同行业对新冠肺炎疫情影响评价图

（二）受访企业供应链、生产经营、出口等受影响明显

47.0%的企业反映疫情对供应链的影响最大；40.4%和36.8%的企业表示生产经营、出口受影响明显；34.9%、31.7%和27.3%的企业表示资金链、国内销售和复工受到影响；6.1%的企业反馈售后服务受影响。

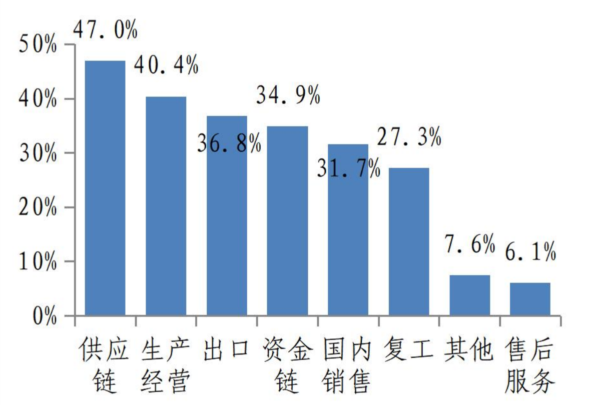


图3-1-5 新冠肺炎疫情对企业生产经营的影响

从行业角度看，资源行业（48.1%）、传统制造业（55.8%）、高

新技术产业（63.7%）受访企业反映供应链受疫情影响较大；其他行业（41.0%）、服务行业（49.2%）、建筑业（50.8%）受访企业反映生产经营受疫情影响较大。

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
供应链 55.8%	供应链 63.7%	供应链 48.1%	生产经营 50.8%	生产经营 49.2%	生产经营 41.0%
出口 48.4%	出口 46.6%	生产经营 42.3%	资金链 43.8%	资金链 37.7%	供应链 40.4%
国内销售 35.8%	国内销售 41.1%	资金链 37.5%	复工 43.8%	供应链 35.4%	出口 36.7%
生产经营 35.5%	资金链 34.7%	复工 36.5%	供应链 30.8%	复工 27.5%	资金链 33.5%
资金链 33.3%	生产经营 33.6%	国内销售 28.8%	国内销售 20.0%	国内销售 26.0%	国内销售 28.7%
复工 28.1%	复工 27.7%	出口 19.2%	其他 16.2%	出口 19.6%	复工 23.1%
售后服务 4.3%	售后服务 7.5%	其他 8.7%	出口 8.5%	其他 11.8%	其他 11.7%
其他 1.4%	其他 4.6%	售后服务 5.8%	售后服务 4.6%	售后服务 9.2%	售后服务 5.2%

（三）受访企业对后疫情时期发展前景乐观态度有所下降

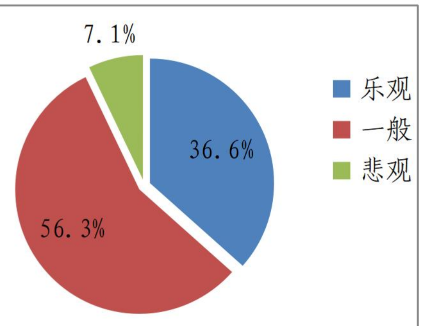


图3-1-6 企业后疫情时期发展前景的预测

调查显示，超五成（56.3%）企业对后疫情时期发展前景持“一般”态度，36.6%持“乐观”态度，仅 7.1%持“悲观”态度。

与 2021 年相比，企业持“乐观”态度的占比减少 4.7 个百分点，持“悲观”态度的占比增加 2.1 个百分点。

从所有制角度看，各类企业对后疫情时期发展前景持“一般”态度的占比较为接近，其中私营企业占比最高（57.5%）；国有企业持“乐观”态度的占比较大，为 50.5%；中外合资、合作企业持“悲观”

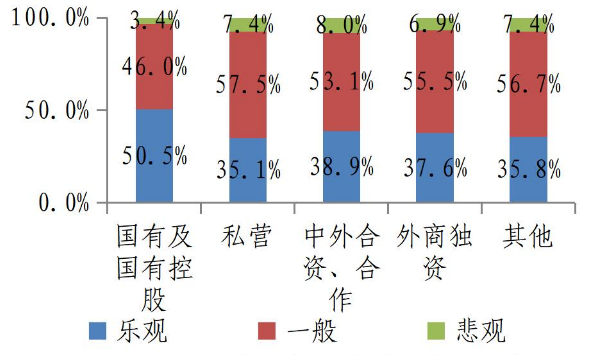


图3-1-7 不同所有制企业对于企业后疫情时期发展前景的预测

态度的占比较大，为 8.0%。

与 2021 年相比，中外合资合作企业、外商独资企业、其他所有制企业、私营企业和国有企业持“悲观”态度占比均有上升，分别提高 5.2、3.7、2.2、1.7 和 1.4 个百分点。

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（43.1%）；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（59.7%）；除服务行业外，各行业企业持“悲观”态度的占比均不足一成。

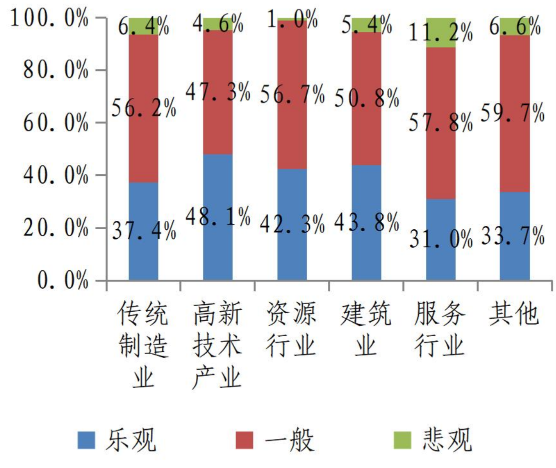


图3-1-8不同行业对于企业后疫情时期发展前景的预测

与 2021 年相比，建筑业企业对后疫情时期持“悲观”态度的占比降低 3.9 个百分点，资源行业、服务行业、传统制造业、高新技术产业和其他行业持“悲观”态度的企业占比均有提高，分别增加 5.8、3.4、2.4、1.4 和 1.4 个百分点。

（四）近七成受访企业希望政府提供疫情补贴

为尽可能减少疫情影响，超六成企业希望政府能提供疫情补贴（66.5%）和加大税收减免力度（63.8%）；44.0%的企业希望政府

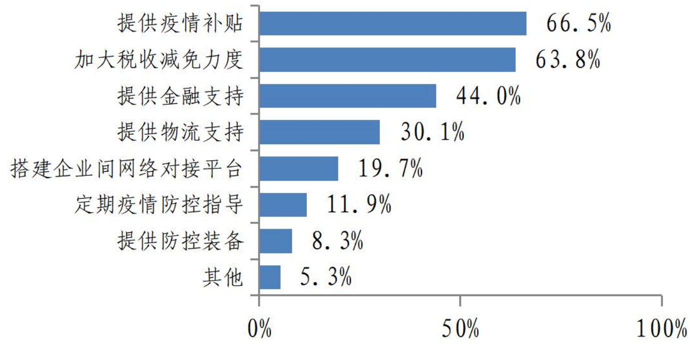


图3-1-9 企业希望政府给予的抗疫支持和帮助

提供金融支持；超三成企业希望政府在提供物流支持（30.1%）和搭建企业间网络对接平台（19.7%）方面给予帮助；约一成企业希望政府能提供定期疫情防控指导（11.9%）和提供防疫装备（8.3%）。

（五）过半数受访企业已采取或可能采取缩减不必要开支的措施

受疫情影响，过半数受访企业已采取或可能采取缩减不必要开支的措施（50.7%）；有49.2%的受访企业调整了经营策略，38.1%的受访企业缩减了生产规模。此外，采取其他、裁员、降薪和暂停经营措施的受访企业分别占12.8%、14.8%、10.7%和9.4%。

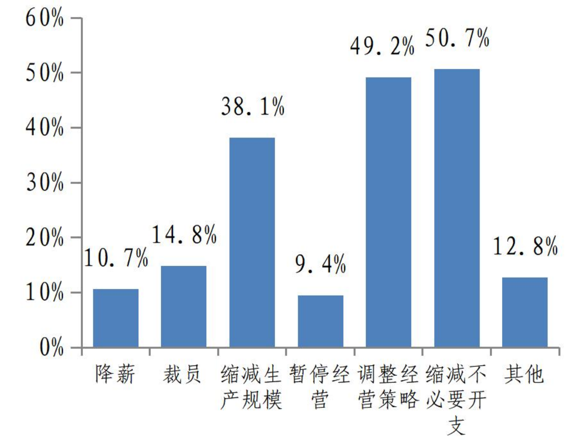


图3-1-10 企业已采取或有可能采取的应对新冠肺炎疫情措施

二、收入增长的受访企业占比同比降低

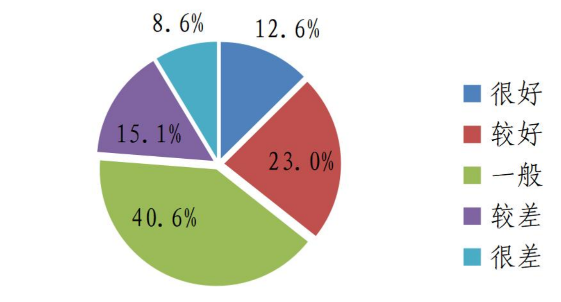


图3-2-1 当前企业投资收益状况

2022年，76.2%的受访企业收入在一般及以上水平，较2021年降低13.2个百分点。35.7%的受访企业收入状况维持在较好及以上，较2021年下降3.8个百分点。[①]

（一）中部地区近五成受访企业收入在较好及以上，东部地区不足三成

分地区看。中部地区（42.0%）收入很好和较好的

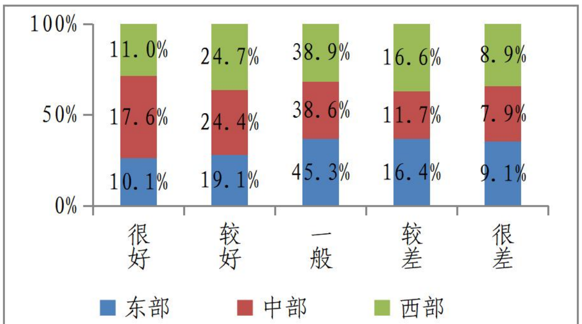


图3-2-2 分地区投资收益图

① 注：营业收入增长幅度在10%以上，为“很好”；增长幅度在5-10%以上为“较好”；增长幅度在0-5%，为“一般”；下降幅度在10%以内为“较差”；下降幅度在10%以上为“很差”。

企业均超过全国水平（35.7%）；东部地区收入较好及以上的企业占比较低，仅 29.2%；西部地区收入很好和较好的企业与全国水平持平。东部、中部和西部收入在一般及以上水平企业占比均超过七成，分别为 74.5%、85.2%和 74.6%。

（二）资源行业投资收入在较好及以上企业占比超五成

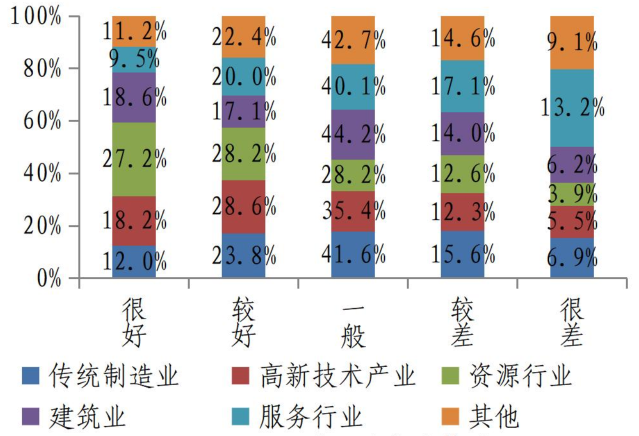


图3-2-3 分行业投资收益

分行业看，资源行业投资收入较好及以上企业占比高达 55.4%，高新技术产业次之（46.8%），服务行业最低（29.5%）。资源行业收入很好和较好企业占比均为最高，分别是 27.2%、28.2%，且收入增长企业（一般及以上）占比最多，为 83.5%。超四成建筑业企业投资收入一般(44.2%)，占比最高。服务行业收入较差和很差企业占比最高，为 30.4%。

（三）收入增长企业占比较 2021 年有所下降

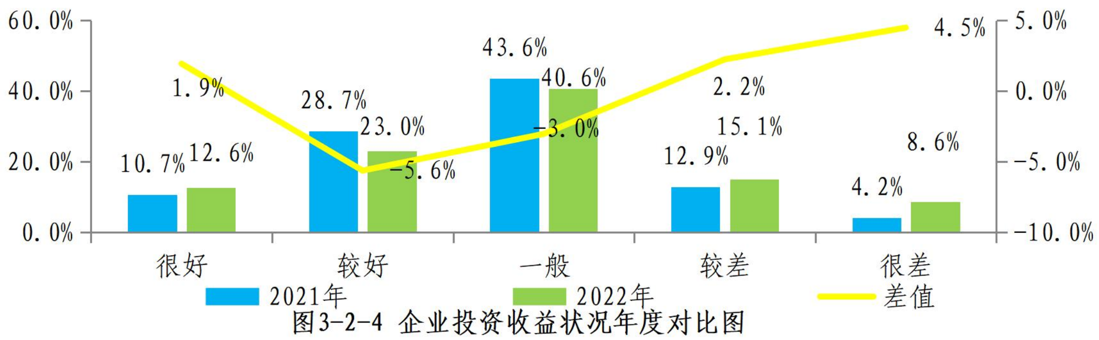
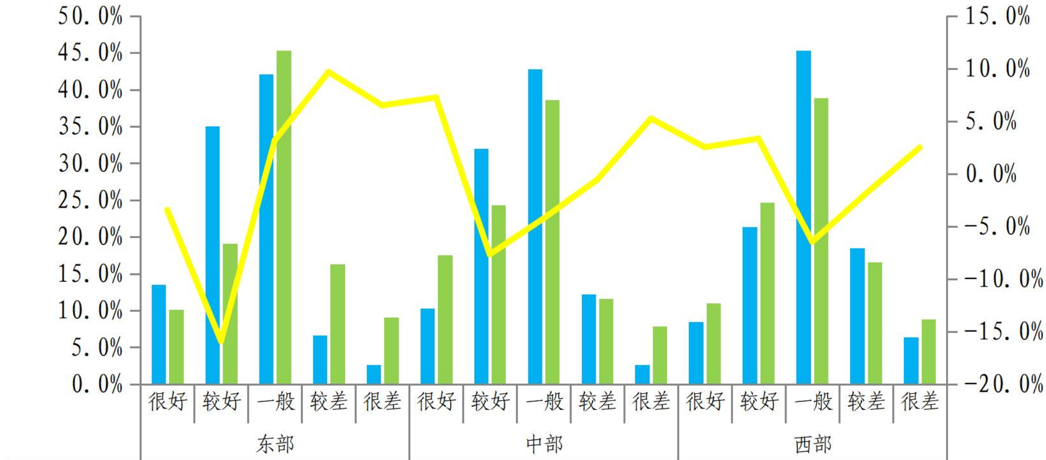


图3-2-4 企业投资收益状况年度对比图

2022 年收入增长（收入一般及以上）企业占比为 76.2%，较 2021 年的 83.0%下降 6.8 个百分点。收入较好企业占比下降 5.6 个百分点，收入一般企业占比下降 3 个百分点。收入很好、较差、很差企业占比均有所提高，分别上升 1.9、2.2 和 4.5 个百分点。



	东部 很好	东部 较好	东部 一般	东部 较差	东部 很差	中部 很好	中部 较好	中部 一般	中部 较差	中部 很差	西部 很好	西部 较好	西部 一般	西部 较差	西部 很差
2021年	13.5%	35.0%	42.1%	6.7%	2.6%	10.3%	32.0%	42.8%	12.2%	2.6%	8.5%	21.4%	45.3%	18.5%	6.4%
2022年	10.1%	19.1%	45.3%	16.4%	9.1%	17.6%	24.4%	38.6%	11.7%	7.9%	11.0%	24.7%	38.9%	16.6%	8.9%
差值	-3.4%	-15.9%	3.2%	9.7%	6.5%	7.2%	-7.7%	-4.3%	-0.6%	5.2%	2.5%	3.3%	-6.5%	-1.9%	2.5%

图3-2-5 各地区企业投资收益状况年度对比图

从不同地区看，2022 年中部地区收入增长企业占 80.6%，较 2021 年降低 4.5 个百分点；西部地区收入增长企业占 74.6%，较 2021 年降低 0.6 个百分点；东部地区收入增长企业占 74.5%，较 2021 年降低 16.1 个百分点。

分行业看，2022 年传统制造业收入增长企业占 44.4%，较 2021 年降低 8.4 个百分点；高新技术产业收入增长企业占 82.2%，较 2021 年降低 4 个百分点；资源行业收入增长企业占 83.6%，较 2021 年提高 4.1 个百分点；建筑业收入增长企业占 79.9%，较 2021 年降低 1.5 个百分点；服务行业收入增长企业占 69.6%，较 2021 年降低 5.8 个百分点；其他行业收入增长企业占 76.3%，较 2021 年降低 6.3 个百分点。

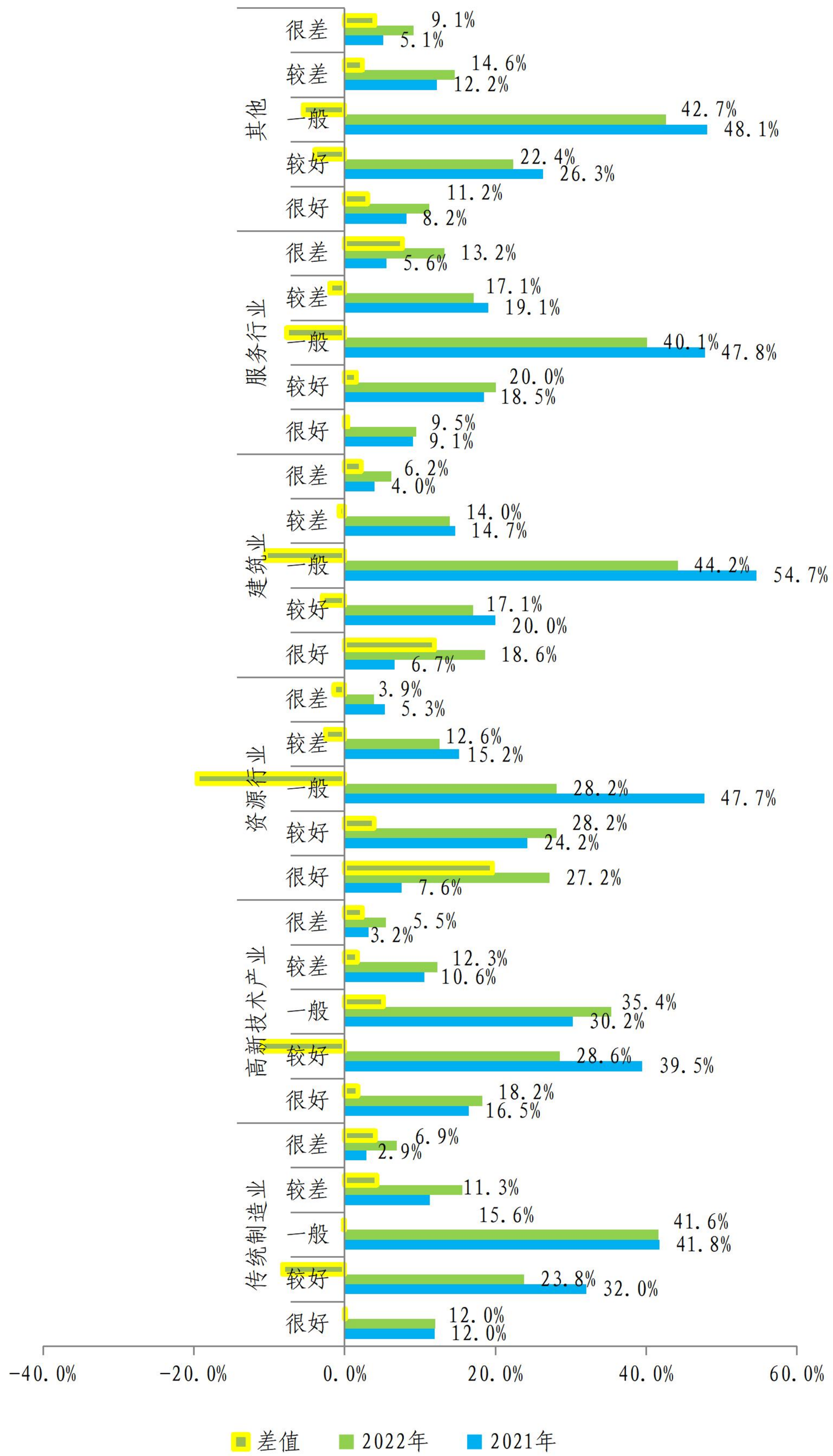


图3-2-6 不同行业企业投资收益状况年度对比图

三、成本提高和市场竞争激烈问题突出

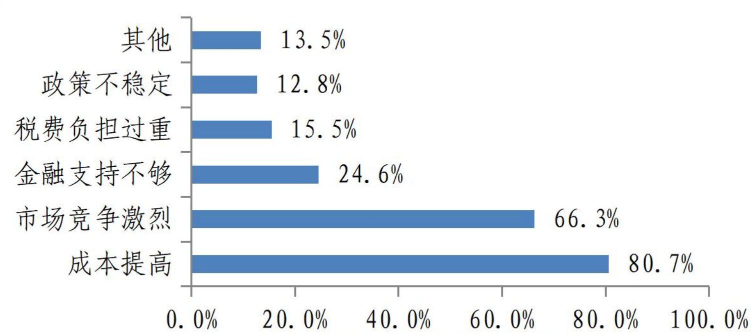


图3-3-1 企业生产经营过程中遇到的问题

企业反映生产经营过程中，成本提高问题和市场竞争激烈最为显著，分别占 80.7%和 66.3%。此外，金融支持不够(24.6%)、税费负担过重(14.9%)、政策不稳定(12.8%)等问题也较突出。

各行业均有超七成企业认为成本提高是生产经营中遇到的最主要问题，其次是市场竞争激烈和金融支持不足。18.4%的传统制造业企业和 18.3%的高新技术产业企业反映税费负担过重；14.1%的资源行业企业和 20.3%的建筑业企业反映政策不稳定；服务行业和其他行业各有 16.0%和 17.9%的企业反映存在其他问题。

表 3-3-1 不同行业生产经营过程中遇到的主要问题

传统制造业	高新技术产业	资源行业	建筑业	服务行业	其他
成本提高 87.2%	成本提高 85.3%	成本提高 76.9%	成本提高 77.2%	成本提高 71.9%	成本提高 78.5%
市场竞争激烈 68.2%	市场竞争激烈 67.3%	市场竞争激烈 57.7%	市场竞争激烈 68.4%	市场竞争激烈 67.0%	市场竞争激烈 63.8%
金融支持不够 20.4%	金融支持不够 28.5%	金融支持不够 29.5%	金融支持不够 34.2%	金融支持不够 24.9%	金融支持不够 26.2%
税费负担过重 18.4%	税费负担过重 18.3%	政策不稳定 14.1%	政策不稳定 20.3%	其他 16.0%	其他 17.9%
政策不稳定 10.4%	政策不稳定 11.3%	税费负担过重 10.3%	税费负担过重 16.5%	政策不稳定 15.9%	税费负担过重 13.6%
其他 9.6%	其他 9.9%	其他 9.0%	其他 12.7%	税费负担过重 12.5%	政策不稳定 13.0%

四、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

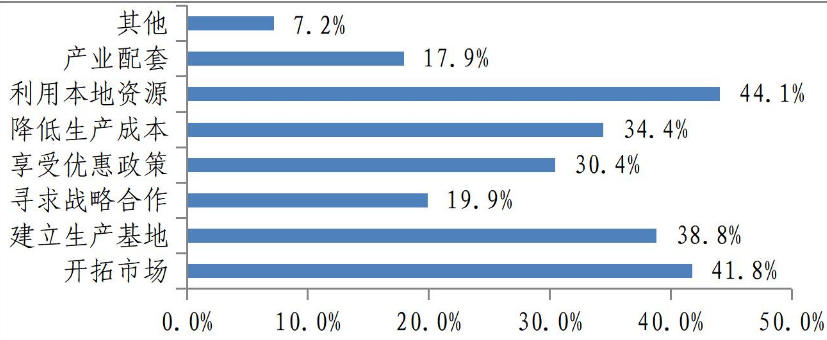
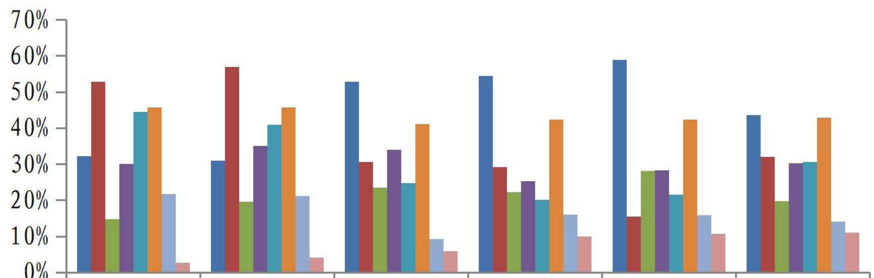


图3-4-1 企业在本地区投资主要因素

44.1%的企业将利用本地资源视作投资的主要原因，其次是开拓市场(41.8%)和建立生产基地（38.8%）。降低生产成本和享受优惠政策的占比在三成以上，分别为34.4%和30.4%。产业配套和寻求战略合作等因素也是企业投资时考虑的重要原因。



	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	32.3%	31.0%	52.9%	54.5%	58.9%	43.6%
建立生产基地	52.9%	56.9%	30.6%	29.3%	15.5%	32.1%
寻求战略合作	14.8%	19.6%	23.5%	22.2%	28.2%	19.9%
享受优惠政策	30.1%	35.1%	34.1%	25.3%	28.3%	30.3%
降低生产成本	44.5%	40.9%	24.7%	20.2%	21.6%	30.7%
利用本地资源	45.7%	45.8%	41.2%	42.4%	42.5%	42.9%
产业配套	21.7%	21.3%	9.4%	16.2%	15.9%	14.1%
其他	2.7%	4.1%	5.9%	10.1%	10.7%	11.1%

图3-4-2 不同行业投资当地的主要因素

从行业角度看，传统制造业、高新技术产业投资首要原因为建立生产基地，分别占52.9%和56.9%；资源行业、建筑行业、服务行业、其他行业投资首要原因为开拓市场，分别占52.9%、54.5%、58.9%、43.6%。

（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(56.1%)企业赴当地投资是通过自身考察落地，近四成（36.2%）企业由当地政府招商引资落地；在已有项目基础上投资新

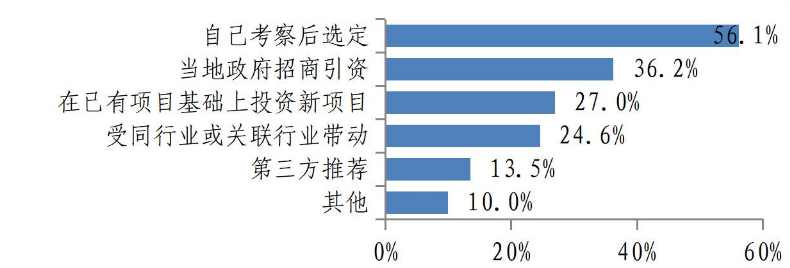


图3-4-3 企业来本地区投资所通过的方式

项目、受同行或关联行业带动而投资的占比分别为 27.0%、24.6%；第三方推荐和其他方式占比较低，分别为 13.5%和 10.0%。

五、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

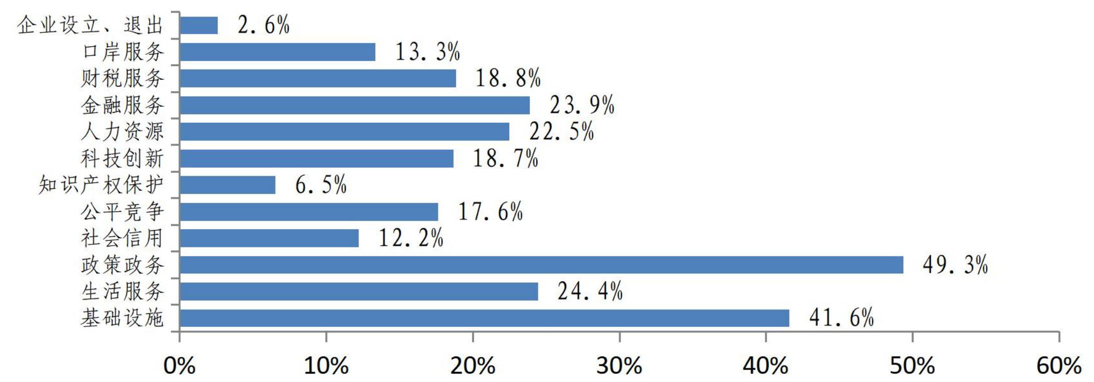


图3-5-1企业认为政府应该进一步改进哪些营商环境

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高（49.3%），其次是基础设施环境（41.6%）、人力资源环境（22.5%）和金融服务环境（23.9%）。

（二）受访企业对地区产业链建设要求较高

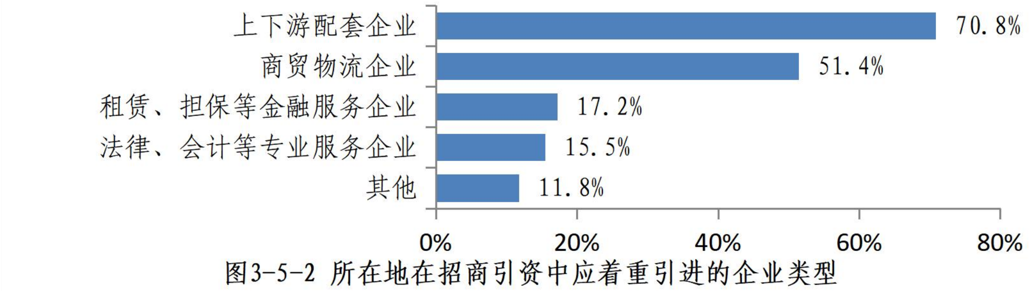


图3-5-2 所在地在招商引资中应着重引进的企业类型

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（70.8%）；其次是引进商贸物流企业（51.4%）；有引进租赁、担保等金融服务企业和法律咨询服务企业需求的受访企业占比分别为 17.2%和 15.5%。

（三）受访企业希望贸促会着重完善信息平台建设

59.1%的受访企业希望贸促会搭建更完善信息平台，占比最高；其次是投资项目对接（49.0%）。此外，分别有 37.6%、32.4%、28.9%和 18.5%的企业需要贸促会提供业务培训、国内外考察、展会论坛和商事法律服务。

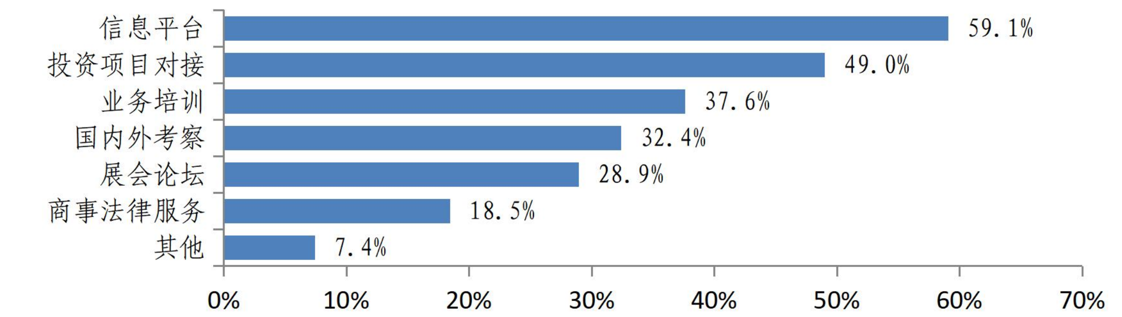


图3-5-3 贸促会应着重提供的服务

第四章　营商环境建设成就

一、营商环境创新改革“由点到面”

（一）开展营商环境创新试点工作

为鼓励有条件的地方进一步瞄准最高标准、最高水平开展先行先试，加快构建与国际通行规则相衔接的营商环境制度体系，持续优化市场化法治化国际化营商环境，2021 年 11 月国务院印发《关于开展营商环境创新试点工作的意见》（以下简称《意见》）[①]。《意见》从十个方面明确了开展营商环境创新试点的重点任务: 一是进一步破除区域分割和地方保护等不合理限制；二是健全更加开放透明、规范高效的市场主体准入和退出机制；三是持续提升投资和建设便利度；四是更好支持市场主体创新发展；五是持续提升跨境贸易便利化水平；六是优化外商投资和国际人才服务管理；七是维护公平竞争秩序；八是进一步加强和创新监管；九是依法保护各类市场主体产权和合法权益，十是优化经常性涉企服务。《意见》提出的主要目标是：经过三至五年的创新试点，试点城市营商环境国际竞争力跃居全球前列，政府治理效能全面提升，在全球范围内集聚和配置各类资源要素能力明显增强，市场主体活跃度和发展质量显著提高，率先建成市场化法治化国际化的一流营商环境，形成一系列可复制可推广的制度创新成果，为全国营商环境建设作出重要示范。

综合考虑经济体量、市场主体数量、改革基础条件等，选择北京、上海、重庆、杭州、广州、深圳作为试点城市，各试点城市的实施及完成情况如下:

北京 2022 年印发《培育和激发市场主体活力持续优化营商环境实施方案》和《关于开展北京市营商环境创新试点工作的实施方案》。这是北京市连续第 5 次集中出台的一批优化营商环境改革举措，被称

[①] 中国政府网 http://www.gov.cn/

之为“1+1”5.0 版改革，也即“创新+活力=北京营商环境 5.0 版改革”。截至 8 月 17 日，北京市 2022 年国家营商环境创新试点城市建设任务已基本完成，营商环境 5.0 版改革 299 项任务完成 83%。[①]

上海 2021 年 12 月印发《营商环境创新试点实施方案》，力争用 3-5 年时间，推动上海营商环境国际竞争力跃居世界前列。2022 年上海各区以创新试点方案为抓手，制定了一系列政策措施，如杨浦区为助力市场主体纾困解难，升级优化营商环境 5.0 版行动方案，制定《对标最高标准、最好水平，持续推进杨浦营商环境改革创新的行动计划》，推出 150 项改革创新任务和 10 大特色服务品牌。[②]

重庆 2022 年 1 月以来先后印发《营商环境创新试点实施方案》等政策文件，持续深化营商环境创新试点和成渝地区双城经济圈营商环境建设，进一步助力市场主体纾困解难，更大激发市场活力和发展内生动力，提升群众办事创业的便利度、满意度和获得感。[③]

杭州 2022 年印发《国家营商环境创新试点实施方案》，形成“1 个总体方案+153 个专项方案”改革体系架构，用一系列实打实的举措释放惠企利民红利。[④]在落实 101 项国家改革事项基础上新增 52 项特色改革事项，蓄力打造国内最优、国际一流营商环境，在电子证照、“互联网+监管”、综合执法、政务服务等领域，打造多项“硬核”成果。

广州 2022 年实施《建设国家营商环境创新试点城市实施方案》，启动营商环境 5.0 改革，以“激发活力”为主线，将制度创新和制度供给作为关键，更大力度利企便民。注重面向全体市场主体，着力构建更有效率的企业全生命周期服务体系，通过“一企一策、一项一策”帮助企业解决困难问题。

深圳 2022 年印发《建设营商环境创新试点城市实施方案》，正式开启优化营商环境 5.0 版改革。从营造竞争有序的市场环境、打造

① 北京市经济和信息化局 http://creditbj.jxj.beijing.gov.cn
② 上海市发展和改革委员会 https://fgw.sh.gov.cn
③ 重庆市政府 http://www.cq.gov.cn
④ 杭州市政府 http://www.hangzhou.gov.cn

公正透明的法治环境、构建国际接轨的开放环境、打造高效便利的政务环境等 4 方面提出 12 个领域的任务内容，并明确了要在今年落地实施的首批 200 项具体改革事项。[①]此外，深圳还聚焦强化要素新供给、对接国际新规则、培育优质新主体三大主攻方向，提出 99 项“自选动作”改革任务，确保把深圳“敢为人先”的首创精神落实到位。[②]

（二）复制推广营商环境创新改革举措

2022 年 10 月 31 日，国务院办公厅发布《关于复制推广营商环境创新试点改革举措的通知》，决定在全国范围内复制推广一批营商环境创新试点改革举措，以进一步扩大改革效果，推动全国营商环境整体改善。复制推广的改革举措包括 9 个方面内容：一是进一步破除区域分割和地方保护等不合理限制（4 项）；二是健全更加开放透明、规范高效的市场主体准入和退出机制（9 项）；三是持续提升投资和建设便利度（7 项）；四是更好支持市场主体创新发展（2 项）；五是持续提升跨境贸易便利化水平（5 项）；六是维护公平竞争秩序（3 项）；七是进一步加强和创新监管（5 项）；八是依法保护各类市场主体产权和合法权益（2 项）；九是优化经常性涉企服务（13 项）。

二、法治化营商环境日趋完善

（一）多方位建设法治化营商环境

1.多位一体健全营商环境配套法规。各地方政府陆续颁布和实施《优化营商环境条例》（以下简称《条例》），并在地方行政立法工作中，对涉及优化营商环境的法规规章优先安排、加力推进、强化审修、突出实效，高质量完成优化营商环境相关立法工作。**北京市**政府为切实保障《条例》中的各项改革措施落地见效，市发改委提前组织各单位研究《条例》实施需配套的各项政策，共梳理出需要出台的配套政策措施 82 项，其中固化现有经验或已出台政策措施 24 项，如建

[①] 深圳市发展和改革委员会 http://fgw.sz.gov.cn
[②] 深圳市商务局 http://commerce.sz.gov.cn

立行政检查单制度、政务服务“好差评”制度、12345 服务热线、公平竞争审查制度等。**黑龙江省**政府为保证《条例》的有效贯彻实施，在全国率先开展营商环境监督专项地方立法工作，相继出台《营商环境监督办法》《社会信用条例》《促进中小企业发展条例》等法律法规，筑牢优化营商环境法治之基。

2.数字经济法律法规持续完善。中国高度重视数字经济发展，持续改善营商环境，出台了一系列法规，包括《网络安全法》《电子商务法》《数据安全法》《个人信息保护法》，先后两次修订《反不正当竞争法》，公布了《反垄断法》修订草案，制定发布《关于平台经济领域的反垄断指南》。同时加大执法力度，成立反垄断局。去年以来，有关部门加强对数字经济平台领域监管执法，查处了强制实行“二选一”，强制性扼杀式收购等违法违规行为，在监管部门指导下，平台企业进行全面整改，数字经济正向规范有序的新发展阶段转变。

3.知识产权保护体系和政策建立健全。为推进知识产权强国建设，全面提升知识产权创造、运用、保护、管理和服务水平，充分发挥知识产权制度在社会主义现代化建设中的重要作用，2021 年 4 月人民法院印发《人民法院知识产权司法保护规划（2021—2025 年）》。9 月中共中央、国务院发布《知识产权强国建设纲要（2021—2035 年）》。10 月国务院印发《“十四五”国家知识产权保护和运用规划》，12 月第十三届全国人民代表大会常务委员会第三十二次会议修订通过《科学技术进步法》，自 2022 年 1 月 1 日起施行。其中，《科学技术进步法》旨在营造尊重知识产权的社会环境，保护知识产权，激励自主创新。此外，通过推进修正《反垄断法》《电子商务法》《专利法》实施细则，以细化反垄断和反不正当竞争规则，预防和制止平台经济领域垄断、不正当竞争等行为，引导平台经营者依法合规经营。

（二）知识产权保护成效显著

1.受理、审结实现“双突破”。2021 年，人民法院受理、审结知

识产权案件数量双双突破60万件，再创历史新高。2021年新收一审、二审、申请再审约64.3万件，审结各类知识产权案件约60.2万件（含旧存），比2020年分别上升22.33%和14.71%。

2.高压严打知识产权侵权行为。2021年，中国查处专利、商标等领域违法案件5.01万件，查办侵权盗版案件2957件，删除侵权盗版链接119.7万条，批准逮捕涉及侵犯知识产权犯罪案件4500余件、7800余人。开展“昆仑2021”专项行动，依法严厉打击侵犯知识产权犯罪。全国公安机关侦破侵犯知识产权和制售假冒伪劣商品犯罪案件2.1万余起。坚持对各类市场主体依法平等保护，先后侦破一批侵犯知识产权的大要案件，以严明法治保障优良营商环境。

3.强化海关行政保护。开展“龙腾行动2021”知识产权保护专项行动。2021年全国海关共查扣进出口侵权嫌疑货物7.92万批次，货物数量7180.3万件。查扣的侵权嫌疑货物涉及商标专用权、专利权、著作权、奥林匹克标志和世界博览会标志等。其中，涉嫌侵犯商标权货物7.9万批次6804.6万件，涉嫌侵犯专利权货物85批次293.3万件，涉嫌侵犯著作权货物233批次81.5万件，涉嫌侵犯奥林匹克标志和世界博览会标志货物8批次8381件。[①]

（三）司法维护市场公平与健康发展

1.以司法维护市场公平竞争。2021年，人民法院不断加强反垄断和反不正当竞争司法，审结垄断案件49件、不正当竞争案件7478件。探索数据权利保护规则，服务数字经济，促进电子商务发展。审理平台“二选一”、刷单炒信等垄断和不正当竞争案件，严惩妨碍公平竞争、损害群众利益行为。

2.以司法助力市场主体有序退出和有效救治。2021年，人民法院共审结破产案件1.3万件，涉及债权2.3万亿元，促进企业优胜劣汰和要素资源高效配置。充分发挥破产审判“积极拯救”和“及时出清”

[①] 国家知识产权局 《2021年中国知识产权保护状况》白皮书

功能，同时坚决防止借破产之名逃废债。配合全国人大常委会开展企业破产法执法检查，促进完善破产法律制度。例如，深圳个人破产条例首案裁定生效，让依法经营、诚实守信的债务人可以从头再来，个人破产制度实践迈出重要一步。审结破产重整案件732件，盘活资产1.5万亿元，让745家困境企业再获新生，35万余名员工稳住就业。

三、全国统一大市场逐渐形成

（一）市场分割进一步破除

2021年11月国务院印发《关于开展营商环境创新试点工作的意见》，[①]提出进一步破除区域分割和地方保护等不合理限制的重点任务，以加快破除妨碍生产要素市场化配置和商品服务流通的体制机制障碍，并提出在试点城市推进六项具体改革事项，包括："一照多址"、"一证多址"改革，便利企业分支机构、连锁门店信息变更，清除招投标和政府采购领域对外地企业设置的隐性门槛和壁垒，推动招投标领域数字证书兼容互认，推进客货运输电子证照跨区域互认与核验，优化常用低风险植物和植物产品跨区域流通检疫申请流程。

2022年3月《关于加快建设全国统一大市场的意见》[②]发布，提出加快建立全国统一的市场制度规则，打破地方保护和市场分割，打通制约经济循环的关键堵点，促进商品要素资源在更大范围内畅通流动，加快建设高效规范、公平竞争、充分开放的全国统一大市场；并从六个方面明确了加快建设全国统一大市场的重点任务，一是强化市场基础制度规则统一，二是推进市场设施高标准联通，三是打造统一的要素和资源市场，四是推进商品和服务市场高水平统一，五是推进市场监管公平统一，六是要进一步规范不当市场竞争和市场干预行为。

10月国务院办公厅发布《关于复制推广营商环境创新试点改革举措的通知》，[③]再次提出进一步破除区域分割和地方保护等不合理限制，包括"开展'一照多址'改革"、"便利企业分支机构、连锁

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① 中国政府网 http://www.gov.cn
② 同上
③ 同上

门店信息变更”、“清除招投标和政府采购领域对外地企业设置的隐性门槛和壁垒”、“推进客货运输电子证照跨区域互认与核验”等。

（二）制度性交易成本降低

优化营商环境、降低制度性交易成本是减轻市场主体负担、激发市场活力的重要举措。当前经济运行面临一些突出矛盾和问题，市场主体特别是中小微企业、个体工商户生产经营困难依然较多。为深入贯彻党中央、国务院决策部署，打造市场化法治化国际化营商环境，降低制度性交易成本，提振市场主体信心，助力市场主体发展，为稳定宏观经济大盘提供有力支撑，2022 年 9 国务院办公厅印发《关于进一步优化营商环境降低市场主体制度性交易成本的意见》。[①]该意见从五个方面为中小微个体解难题：一是进一步破除隐性门槛，推动降低市场主体准入成本；二是进一步规范涉企收费，推动减轻市场主体经营负担；三是进一步优化涉企服务，推动降低市场主体办事成本；四是进一步加强公正监管，切实保护市场主体合法权益；五是进一步规范行政权力，切实稳定市场主体政策预期。

为推动个体工商户实现长远健康发展，解决个体工商户“急难愁盼”问题，国务院 2022 年 10 月公布《促进个体工商户发展条例》，自 2022 年 11 月 1 日起施行。[②]个体工商户是百姓生活最直接的服务者，截至 2022 年 9 月底，全国登记在册的个体工商户 1.11 亿户，占中国市场主体总量的三分之二，带动就业近 3 亿人，在稳增长、促就业、惠民生等方面发挥着重要作用。新条例是在原《个体工商户条例》基础上制定出台的，结合个体工商户发展的总体形势、问题困难和利益诉求，有利于更好地促进个体工商户长远健康发展。

新条例进一步降低了制度性交易成本。个体工商户经营主要集中在批发零售、餐饮和居民服务行业，新条例分别从线下和线上两方面作出了规定。首先是支持个体工商户在社区从事与居民日常生活密切

① 中国政府网 http://www.gov.cn
② 同上

相关的经营活动，满足居民生活消费需求；其次是引导和支持个体工商户加快数字化发展，提升线上经营能力。同时，回应了个体工商户提出的入驻网络平台经营遇到的种种问题，专门规定了平台经营者的义务。按照原条例和相关登记管理法规的规定，个体工商户变更经营者，也就是通常所说的“出兑”店铺、转让经营权的，除家庭成员之间的变更外，都要重新申请登记，即注销原个体工商户，申请设立新的个体工商户。为解决这一问题，新条例调整了个体工商户变更经营者的方式，由原来的“先注销、后成立”改为“直接向市场主体登记机关申请办理变更登记”。这一规定便利了个体工商户经营权的转让，实现了个体工商户变更经营者在成立时间、字号和相关行政许可方面的延续，大大简化了手续、降低了制度性交易成本，有利于个体工商户持续经营、打造“百年老店”。[①]

四、外资企业投资信心不断增强

（一）吸引外资实现稳中有增、稳中提质的明显成效

今年以来，面对日趋复杂严峻的国际形势以及跨国投资疲软等新情况新问题，我国吸引外资克服了多重困难，实现了稳中有增、稳中提质的明显成效。商务部数据显示，2022 年 1-10 月，全国实际使用外资金额 10898.6 亿元人民币，接近 2021 年全年水平，按可比口径同比增长 14.4%，折合 1683.4 亿美元，增长 17.4%。从产业结构看，全国高技术产业利用外资同比增速高于总体水平，其中高技术制造业增长 57.2%，高技术服务业增长 25%。从来源结构看，外资来源地更趋多元平衡，韩国、德国、英国、日本实际对华投资同比分别增长 106.2%、95.8%、40.1%和 36.8%。从区域结构看，中西部地区利用外资增速高于东部地区，东、中、西部地区实际使用外资分别增长 12.4%、33.6%和 26.9%。

（二）出台多项政策措施“引外资”“稳外资”

[①] 新华社 《推动个体工商户实现长远健康发展——聚焦《促进个体工商户发展条例》》

2022 年《政府工作报告》及《国务院关于印发扎实稳住经济的一揽子政策措施的通知》中，明确要求扩大鼓励外商投资范围，支持外资加大中高端制造、研发、现代服务等领域和中西部、东北地区投资。为进一步扩大外资流入，稳定外商投资规模，提高利用外资质量，更好发挥利用外资在促进中国制造业高质量发展、更深融入全球产业链供应链的积极作用，2022 年 10 月，国家发展改革委等部门印发《关于以制造业为重点促进外资扩增量稳存量提质量的若干政策措施》。该《措施》主要包括以下三方面内容：一是优化投资环境，扩大外商投资流入；二是加强投资服务，支持外商投资企业发展；三是引导投资方向，提升外商投资质量。具体包括深入实施外资准入负面清单、高标准落实外资准入后国民待遇、鼓励外商投资企业利润再投资、支持制造业外商投资企业进出口、优化外商投资结构、支持外商投资创新发展等 15 项举措。[①]随后，国家发展改革委、商务部又公开发布了《鼓励外商投资产业目录（2022 年版）》，[②]该目录作为中国重要的外商投资促进政策，对于支持外资发展、引导外资产业投向、优化外资区域布局发挥了重要作用。本次修订主要有以下三方面变化：一是持续鼓励外资投向先进制造业，二是持续引导外资投向现代服务业，三是持续引导外资投向中西部和东北地区优势产业。该目录内的行业领域主要可享受三项优惠政策：一是在投资总额内进口自用设备，除国家规定不予免税的产品，免征关税；二是对于集约用地的鼓励类工业项目优先供应土地，并且可以按不低于所在地等别相对应全国工业用地出让最低价标准的 70%确定出让底价；三是在西部地区和海南省投资，还可进一步减按 15%税率缴纳企业所得税。[③]

（三）贸促会设立服务外资专班坚定外企扎根中国信心底气

2022 年 6 月召开的国务院常务会议指出，对外开放是我国的基本国策，稳外贸稳外资事关经济全局、就业大局，要进一步扩大对外

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① 中国商务部 http://www.mofcom.gov.cn
② 同上
③ 同上

开放。在落实已出台稳外贸稳外资政策同时，进一步加大支持。会议提出，保障外贸外资企业生产流通稳定是当前稳外贸稳外资工作重中之重，要充分发挥各级稳外贸稳外资、物流保通保畅等机制作用，及时协调解决外贸外资企业复工达产、项目建设等方面困难。指导地方创新稳外贸稳外资措施。

经国务院批准，中国贸促会设立服务外资企业工作专班，建立起外资企业诉求自下而上、便捷快速的直通车，进一步夯实上下贯通、横向协作的外资企业服务体系。这项工作覆盖全国贸促系统、面向广大外资企业，是做好稳外资工作、服务稳住经济大盘的重要抓手和平台。外资专班成立以来，贸促会坚持全国贸促系统一盘棋，加强与有关部门的协作配合，通过召开座谈会、建立直报平台、密切与企业联系、深入企业调研等方式，广泛收集数百项外资企业诉求，经过梳理甄别、分门别类、归纳提炼，及时向有关部门进行反映，推动一大批外资企业急难愁盼问题得到有效解决，产业链供应链运转更加顺畅，受到外资企业高度赞扬。

五、科技创新全方位发力

（一）顶层政策不断引领

在《关于促进中小企业健康发展的指导意见》[①]基础上，2021 年 6 月，财政部、商务部、国务院国有资产监督管理委员会、中国证券监督管理委员会等六部门联合印发《关于加快培育发展制造业优质企业的指导意见》。[②]11 月，国务院促进中小企业发展工作领导小组办公室印发《为“专精特新”中小企业办实事清单》和《提升中小企业竞争力若干措施》。这些政策和措施立足新发展阶段，以推动企业高质量发展为主题，不断健全体系、完善政策、优化服务，着力增强自主创新能力。[③]中国将会以金融财政和人才政策措施等抓手，加快培育和发展一批专业化、精细化、特色化、新颖化的专精特新“小巨人”

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① 中国科技部 http://www.scio.gov.cn
② 中国政府网 http://www.gov.cn
③ 同②

企业，并且在重点行业和领域引导“小巨人”等各类企业成长为国际市场领先的单项冠军企业，引导大企业集团发展成为具有生态主导力、国际竞争力的领航企业。

（二）科技成果转化机制愈发健全

1.完善科技成果转移转化制度规范。《科学技术进步法》修订版将科技成果转化摆在突出位置。无论篇幅还是内容都有较大扩展，从科技创新基本法角度将《促进科技成果转化法》自 2015 年施行以来的重要决策和政策举措，以及行之有效的经验做法上升为法律规范。

2.完善科技成果评价机制。科技成果评价是科技成果转移转化中的关键一环。完善的科技成果评价机制，有助于大幅提高科技成果转移转化成效。2021 年 7 月国务院办公厅印发的《关于完善科技成果评价机制的指导意见》[①]提出“充分发挥科技成果评价的‘指挥棒’作用，全面准确反映成果创新水平、转化应用绩效和对经济社会发展的实际贡献，着力强化成果高质量供给与转化应用”。

3.落实科技成果转化激励政策。激励科技人员实施科技成果转化，是激发第一动力、激活第一资源的重要举措，关键是落实科技成果转化奖酬金政策。国家多个文件强调要对科技人员实施激励分配。针对科技成果转化奖酬金政策落实中如何把握政策执行尺度问题，2021 年 2 月，人力资源社会保障部、财政部、科技部印发《关于事业单位科研人员职务科技成果转化现金奖励纳入绩效工资管理有关问题的通知》[②]，明确了科研成果转化奖励不受绩效工资总额限制，不作为下一年度绩效工资核定基数，不作为社会保险缴费基数。

（三）财税扶持力度加大

为了优化创新企业的营商环境，增加创新动能，激发企业创新活力，服务国家创新驱动发展战略，2021 年，财政部、海关总署、税务总局针对科技创新的主要环节和关键领域，陆续推出了多个税费优

[①] 中国政府网 http://www.gov.cn
[②] 同①

惠政策，如《关于支持集成电路产业和软件产业发展进口税收政策的通知》（财关税〔2021〕4 号）、《关于延长部分税收优惠政策执行期限的公告》（财政部税务总局公告 2021 年第 6 号）、《关于进一步完善研发费用税前加计扣除政策的公告》（财政部税务总局公告 2021 年第 13 号）、《关于“十四五”期间支持科技创新进口税收政策的通知》（财关税〔2021〕23 号）等政策，这些政策从研发费用扣税、免征用于科研资料等进口环节增值税、房产税和城镇土地使用税等方面对科技创新企业进行了大力度扶持。

China’s Business Environment Annual Report (2022)

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Contents

Preface

I. Background And Significance Of The Research

Optimizing business environment is a major decision and deployment made by the Chinese government in response to the new situation, new development trend and new requirements. In the report to the Twentieth National Congress of the Communist Party of China, Xi Jinping, the general secretary of the Chinese Communist Party, emphasized the need to improve the basic systems of the market economy regarding property rights protection, market access, fair competition, and social credit, and to optimize the business environment. The Report on the Work of the Government (2022) also proposed to promote the reform of "streamlining administration and delegate power, improving regulation, and upgrading services" around the creation of a market-oriented, rule-of-law, internationalized business environment. In recent years, despite the impact of the epidemic, the increasing downward pressure on the economy and other unfavorable factors, China has achieved certain results in optimizing the business environment. Data from the State Taxation Administration shows that in the first five months of 2022, 5.547 million new tax-related market entities were established nationwide, up 6.2% year-on-year. According to the latest data from the National Bureau of Statistics, the GDP in the first three quarters of 2022 was about CNY 87 trillion, up 3.0% year-on-year at constant prices, seeing a 0.5% faster rise from the first half of the year; by industry, the primary, secondary and tertiary industries grew 4.2%, 3.9% and 2.3% year-on-year, respectively.

At present, as the pandemic is still spreading around the world, there is not enough momentum for the recovery of the world economy. Commodity prices fluctuate at high levels, and the international environment is becoming more complex, severe and uncertain. The recovery of consumption and investment is sluggish, the difficulty of stabilizing exports is increasing, and the production and operation of small, medium and micro enterprises and individual industrial and commercial households are also in a pickle. Therefore, how to further optimize the business environment and stimulate market vitality is still a major issue that requires continuous attention, and creating a first-class business environment is an arduous task and of great significance.

In order to give full play to the resource advantages of our trade promotion system and assist relevant departments of the state to optimize the business environment, the Department of Trade and Investment Promotion, China Council for the Promotion of International Trade (the "Promotion Department, CCPIT") and the Academy of CCPIT have carried out survey of China's business environment and released annual reports for six consecutive years since 2016. On this basis, the research team continued to fulfill the mission in 2022, with the aim of closely tracking and analyzing changes in China's business environment, comprehensively and objectively reflecting the achievements and problems of the business environment, and making suggestions and recommendations, so as to further stimulate the creativity of enterprises and the vitality of the market and promote the stable and healthy development of the economy and society.

II. Research Methods

Various methods including questionnaire survey, field investigation, enterprise symposium, comparative analysis and literature analysis were adopted for this research.

(I) Questionnaire survey

From May to September 2022, CCPIT organized and carried out the survey of China's business environment in 2022 by distributing questionnaires to enterprises. The research team collected 7,657 questionnaires, including 5,372 online and 2,285 offline, and more than 300 questionnaires were submitted from each of Jiangxi, Hubei, Guangxi, Gansu, Shanxi, Fujian, and Hunan. Through 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 2022, the research team went to Yunnan, Jiangxi, Jiangsu and other places, visited more than 20 special zone such as Nanchang National High-tech Industrial Development Zone and Jiangsu Free Trade Zone Nanjing Area, and held discussions with more than 700 enterprises, receiving strong support from local governments, associations, zone management committees and enterprises. The research team had face-to-face and in-depth exchanges with the members of management committees of industrial parks and representatives of enterprises to learn about the current situation, achievements and problems of the business environment in different regions from different perspectives and to verify and supplement the information on the questionnaires of enterprises, which provided support for a comprehensive and objective assessment of the business environment in China.

(III) Enterprise symposium

From April to September 2022, in order to steadily promote the research on China's business environment while implementing epidemic prevention and control measures, the research team cooperated with Guangxi and Hubei branches of CCPIT to organize an online business environment symposium with more than 200 companies, and acquired abundant first-hand information.

(IV) Comparative analysis

The research team selected the data related to China's business environment in 2022 and 2021 for horizontal and vertical comparison, so as to learn about the dynamic changes among different regions, different industries (traditional manufacturing, high-tech, resource, construction and service industries) and enterprises of different nature (state-owned, state-controlled, private, Sino-foreign joint ventures and cooperative enterprises), have an in-depth understanding of the differences, characteristics and trends of the business environment among different regions, industries and enterprises, promote 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 United Nations Conference on Trade and Development and other international organizations, 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 the business environment. In addition, local trade promotion associations in Jiangxi, Guangxi, Hubei, Gansu, and Tianjin and local sub-councils of CCPIT also provided relevant information on the business environment， which further enriched the content of the report.

III. Evaluation Indexes

Referring to CCPIT’s Business Environment Evaluation Index System issued in 2021 and drawing lessons from and absorbing WB’s

Doing Business Index System, the research team considered the actual situation of this year to improve improved the 2022 China Business Environment Evaluation Index System and the corresponding enterprise questionnaire.

After repeated demonstration and analysis, we designed an evaluation index system for China's business environment in 2022 consisting of 12 primary indexes and 48 secondary indexes. Each primary index is the weighted average of the corresponding secondary indexes (Table 0-1), and the comprehensive evaluation score is obtained by taking the arithmetic average of the primary indexes.

The 12 primary indexes include infrastructure environment, life-support service environment, policy and government administration environment, social credit environment, fair competition environment, rule by law environment, technology innovation environment, human resources environment, financial service environment, fiscal and tax service environment, customs service environment and enterprise establishment and withdrawal environment.

Table 0-1 2022 China's Business Environment Evaluation Indexes

Primary l indexes	Secondary indexes
Infrastructure	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	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	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	Construction of punishment and reward mechanism (1/3) Government credit (1/3) Construction of credit system (1/3)
Fair Competition	Market supervision (1/5) Administrative monopoly governance (2/5) Government procurement (1/5) Market access (1/5)

Rule by law	National People's Congress legislation and legal supervision (1/6) Law-based administration of government (1/6) Courts' conclusion of cases on schedule (1/6) Arbitration courts' conclusion of cases on schedule (1/6) Enforcement of court judgments and arbitral awards (1/6) Intellectual property rights protection (1/6)
Technological Innovation	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-optional indexes (2): Enterprise R&D investment in science and technology, intellectual property rights application cycle
Human Resources	Availability of skilled labor (1/4) Availability of middle and senior managers (1/4) Availability of specialized talents (1/4) Availability of innovative and entrepreneurial talents (1/4) Enterprise-optional indexes (2): Proportion of labor cost in total cost; average annual increase rate of labor cost
Financial Service	Financing convenience (1/2) Diversity of financing channels (1/2) Enterprise-optional indexes (2): Proportion of financing cost in total cost; average annual increase rate of financing cost
Fiscal And Tax	Standardization of fiscal and tax law enforcement (1/2) Processing time for tax refund (1/2) Enterprise-optional indexes (5): Number of tax payments, tax payment processing time, total fee rate, total tax rate, export tax refund processing time
Customs Service	Goods clearance (1/3) Inspection and quarantine (1/3) Personnel entry and exit (1/3)
Enterprise Establishment And Withdrawal	Land acquisition (1/3) Environmental protection procedure (1/3) Bankruptcy procedure (1/3)

IV. Respondent Composition

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

In this survey, 76.3% of the surveyed enterprises are private enterprises; state-owned and state-controlled enterprises (hereinafter referred to as "state-owned enterprises") and enterprises of other types both account for about 7.2%; wholly foreign-owned enterprises account for 5.4%; and Sino-foreign joint ventures and cooperative enterprises account for 4.0%.

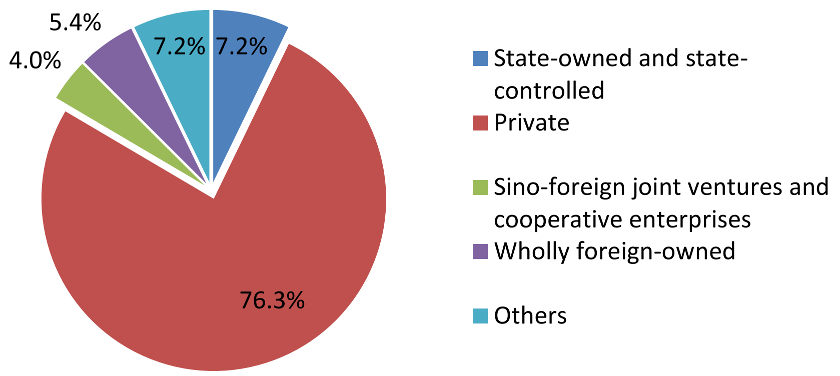


figure0-1 Distribution of Surveyed Enterprises by Ownership

(II) Traditional manufacturing enterprises account for one-third

Among the enterprises involved in the survey, 33.2% are engaged in traditional manufacturing, 21.2% in service industry, 11.3% in high-tech industry, 3.3% in construction industry, 2.6% in resource industry, and 29.6% in other industries.

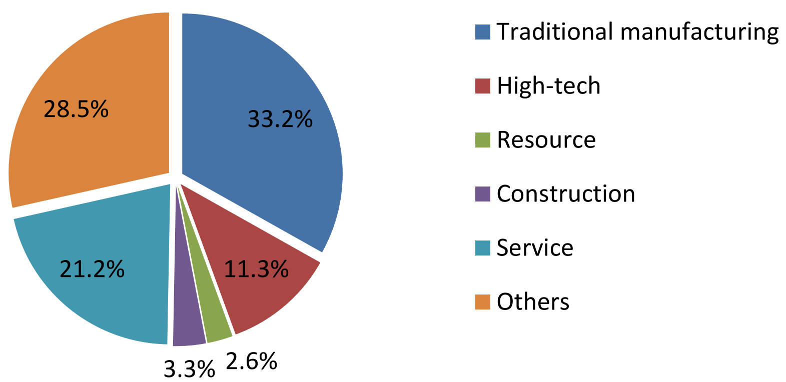


figure0-2 Distribution of Surveyed Enterprises by Industry

(III) Small and micro enterprises account for nearly 70%

Among the enterprises involved in the survey, 68.4% are small and micro businesses with 100 or less employees; 22.4% have 100-500 employees; 6.8% have 500-2000 employees; and 2.5% are super large enterprises with 2000 or more employees.

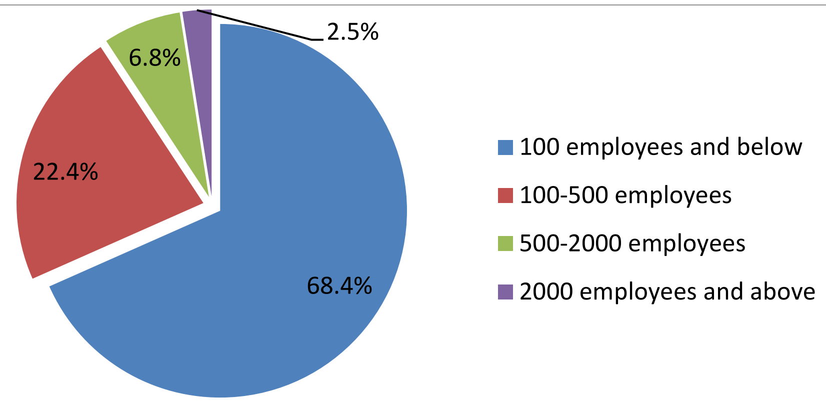


figure0-3 Distribution of Surveyed Enterprises by Size

(IV) Nearly 70% of the surveyed enterprises have been continuously operating for more than five years

Among the enterprises involved in the survey, 5.6% are new enterprises with a history of less than one year, 14.1% with 1-3 years, 12% with 3-5 years, and 68.3% with more than 5 years.

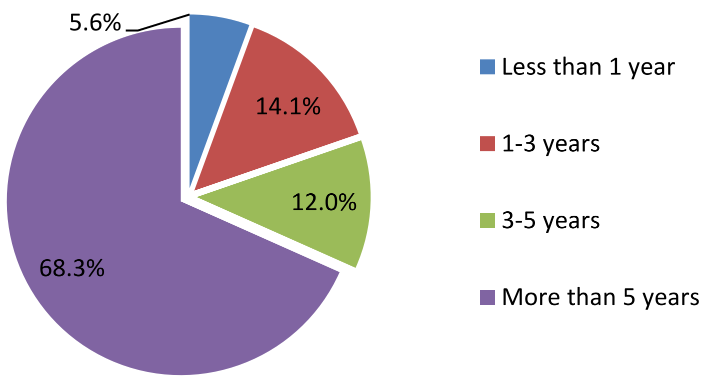


figure0-4 Duration of Continuous Operation of Surveyed Enterprises

V. Main Conclusions

(I) Enterprises generally gave good ratings for China’ s business environment in 2022

At present, the world is becoming more complicated, severe and uncertain, and the risks and challenges facing China's development have increased significantly. In 2022, the Party Central Committee and the State Council coordinated epidemic prevention and control and economic and social development, considered development and security in an overall perspective, continued to ensure stability on six key fronts and maintain security in six key areas, improved people's livelihood, focused on stabilizing the macroeconomic market, and maintained the economic operation within a reasonable range.

The rating for China's business environment in 2022 is 4.38 points, the same as that in 2021. Of the scores of the 12 primary indexes, 6 have increased, 1 has kept level with the previous year’ s rating, and 5 have declined, compared with 2021. Among them, social credit environment received the highest rating, followed by fiscal and tax service environment, social legal environment, customs service environment and fair competition environment; the scores of financial service environment and human resources environment are relatively low. The central region, Sino-foreign joint ventures and the resource industry contributed higher ratings. The new dual-cycle pattern and the high-quality development of the "Belt and Road Initiative" have brought vast opportunities to the western region of China. With the joint efforts of the government, relevant service agencies, and enterprises, the rating on the business environment in the western region of China improved significantly in 2022.

As the impact of the COVID-19 epidemic continued to expand in 2022, nearly 90% of the enterprises were negatively affected to varying degrees, and the number of companies with year-on-year revenue growth decreased by 13.2% compared with 2021. Forty-seven percent of companies reflected that their supply chains were affected, and half of them have taken or may take measures to reduce expenditures and adjust business strategies to cope with the impact of the epidemic. Despite many difficulties in production and operation, only 7% of the enterprises are "pessimistic" about future development. To minimize the impact of the epidemic, more than 60% of the enterprises expect subsidies and tax breaks from the government to help them tide over the difficulties.

In the meantime, over 70% of them achieved revenue growth in 2022. “Utilization of local resources” and “market expansion” are major drivers for enterprises’ investment in 2022. "Rising costs" and "fierce market competition" are the main problems encountered by the enterprises in the production and operation. The enterprises hope that the government can further optimize the policy and government administration environment, introduce upstream and downstream supporting enterprises and trading and logistics enterprises, and help them restore production and operation order.

(II) China's business environment has been continuously improved

1. Pilot reform measures have been promoted across the country to advance the innovation and reform of business environment. In October 2022, the Party Central Committee and the State Council decided to replicate and promote a number of pilot business environment innovation and reform measures across the country to expand the effect of the reform and promote the overall improvement of business environment nationwide.

2. The law-based bu siness environment has been continuously improved. In 2022, various legislative, judicial, and law enforcement agencies took multiple measures to promote the construction of a law-based business environment by improving the legal system, raising the

level of protection of intellectual property rights, and maintaining the fairness and healthy development of the market.

3. A unified nationwide market has been gradually formed. In April 2022, the Party Central Committee and the State Council proposed to accelerate the construction of a unified national market. As all local departments introduced relevant regulatory measures, the costs of institutional transactions across regions and departments have gradually decreased, and market barriers have been removed.

4. The confidence of foreign-capital enterprises in investing in China has been continuously enhanced. Stabilizing foreign investment is a key basis to expand opening to the outside world. The Party Central Committee and the State Council have successively issued a series of documents and policies to help foreign-capital enterprises tide over their difficulties. In addition, the CCPIT has set up a task force to serve foreign-capital enterprises to further strengthen their confidence in taking root in China.

5. China has intensified support for scientific and technological innovation in an all-round way. General Secretary Xi Jinping pointed out that we must regard science and technology as our primary productive force, and innovation as our primary driver of growth. In 2022, China strengthened the top-level institutional innovation, improved the transformation mechanism of scientific and technological achievements, enhanced fiscal and taxation support, and continuously activated the innovation vitality of enterprises.

Chapter I Overall Evaluation Of China's Business Environment

According to the survey questionnaire, the overall rating of surveyed enterprises on China's business environment in 2022 is 4.38, the same as that in 2021. [①] More than 40% of the surveyed enterprises are "very satisfied" with China's business environment, and more than 60% believe that the business environment has improved in the past three years.

I. Business Environment Has Generally Been Rated As Good

(I) More than 40% of the surveyed enterprises are "very satisfied" with the business environment

The surveyed enterprises are generally satisfied with China's business environment, with 42.89% being "very satisfied" and 53.57% being "basically satisfied"; those who rated “merely fair” account for 3.49%; and only 0.05% think that China's business environment is "bad".

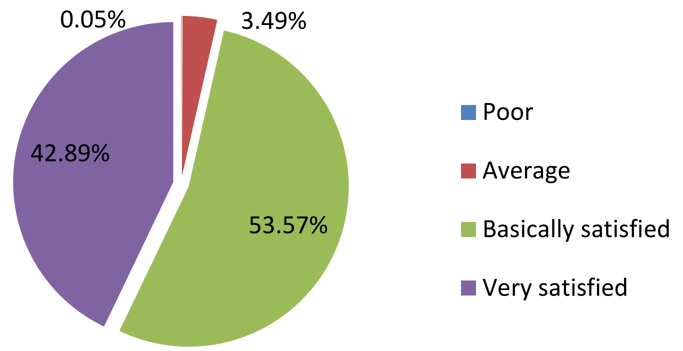


figure1-1 Satisfaction with China's Business Environment, 2022

(II) About 60% of the enterprises surveyed believe that the business environment has improved in the past three years

30.81% of the enterprises surveyed believe that China's business

[①]Note: The data involved in Chapters I, II, and III of this report are mainly derived from the questionnaire survey of enterprises on business environment organized by CCPIT in 2022.

environment has "improved significantly" in the past three years; 33.19% believe that it has "somewhat improved"; 9.59% see no change; 26.4% feel that it has worsened (including "seriously worsened" and "somewhat worsened"), and this proportion is higher than that in 2021 (6.2%).

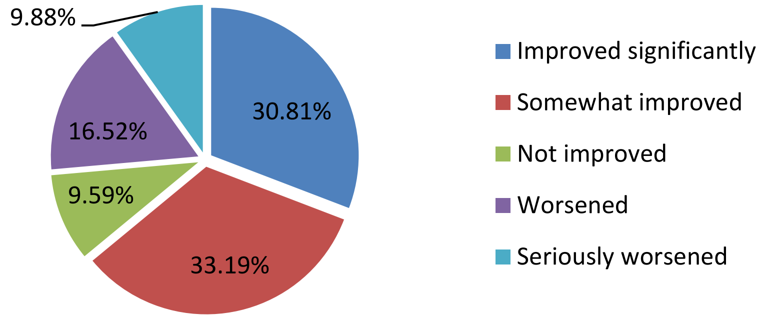
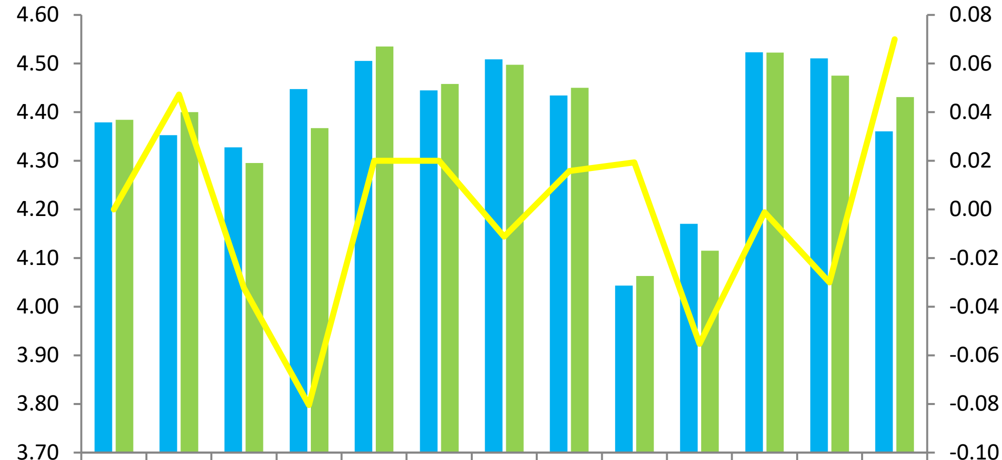


figure1-2 Improvement of China's Business Environment in the Past Three Years

(III) The enterprises surveyed generally rate China's business environment as "good", with the highest score appearing on social credit

China's business environment scores 4.38 in 2022, the same as in 2021, reaching a good level. Among the indexes, social credit gains the highest score of 4.53, while fiscal and tax service environment (4.52) and rule by law environment (4.50) are also at an excellent level. Human resources environment is rated the worst with 4.06 points, followed by financial service environment with 4.11 points.

The surveyed enterprises' overall rating on China's business environment in 2022 is the same as that in 2021. Among the 12 primary indexes, the ratings on 6 indexes have improved, with enterprise establishment and withdrawal environment seeing the largest increase of 0.07 points, followed by infrastructure environment (0.05 points) and social credit (0.02 points); the scores of technology innovation environment and human resources environment have increased by 0.02 points, and those on fiscal and tax service environment has remained the same as in 2021.



	Business Environment	Infrastructure	Life-support Service	Policy Making & Government Administration	Social Credit	Fair Competition	Rule by Law	Technological Innovation	Human Resources	Financial Service	Fiscal and Tax Service	Customs Service	Enterprise Establishment and Withdrawal
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
2022	4.38	4.40	4.30	4.37	4.53	4.46	4.50	4.45	4.06	4.11	4.52	4.48	4.43
Difference	0.00	0.05	-0.03	-0.08	0.02	0.02	-0.01	0.02	0.02	-0.06	0.00	-0.03	0.07

figure1-3 Comparison of Business Environment Rating by Year

II. China’s Central Region Gave The Highest Rating

By region, the central region has gained the highest rating of the business environment (4.47 points), the western region is in the middle (4.32 points), and the eastern region is at the bottom (4.31 points).

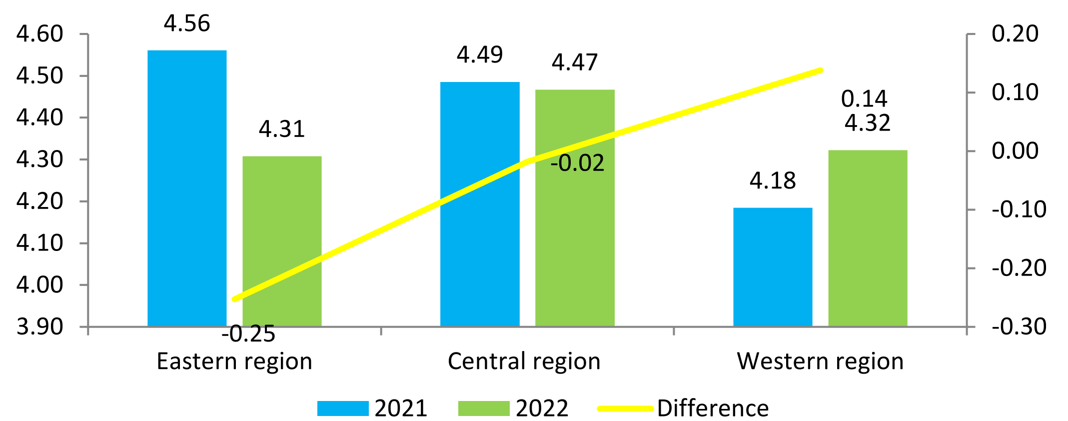


figure1-4 Comparison of Business Environment Rating by Region

Compared with 2021, the rating on the business environment in the western region in 2022 has increased by 0.14 points; as the eastern and central regions were significantly affected by objective factors such as the

COVID-19 epidemic, and the ratings have decreased by 0.25 and 0.02 points respectively.

III. Sino-Foreign Joint Ventures Gave Higher Evaluation

In terms of ownership, Sino-foreign joint ventures and cooperative enterprises have given the highest score of 4.51 on China's business environment, while private enterprises have given the lowest score of 4.32. The ratings of wholly foreign-owned enterprises, enterprises of other ownership and state-owned enterprises are in the middle, being 4.47, 4.41 and 4.36 points respectively.

Compared with 2021, enterprises of other ownerships in 2022 have increased their ratings by 0.21 points, followed by wholly foreign-owned enterprises (whose ratings have increased by 0.01 points); the ratings of state-owned enterprises, private enterprises and Sino-foreign joint ventures and cooperative enterprises have decreased by 0.09, 0.04 and 0.01 points respectively.

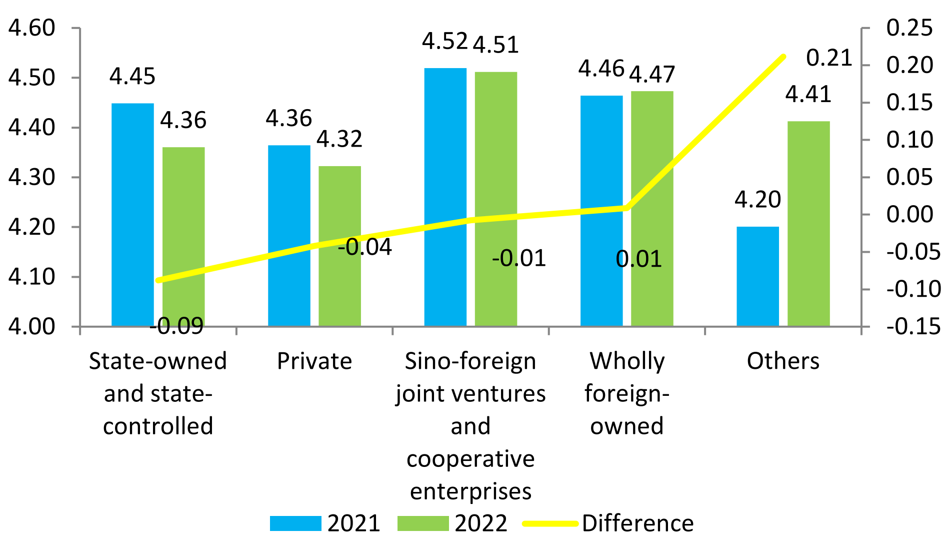


figure1-5 Comparison of Business Environment Ratings of Enterprises of Different Ownerships by Year

IV. Resource Industry Gave Higher Evaluation

Among the industries, the resource industry has the highest rating on China's business environment, with a score of 4.53, followed by the construction industry, with a score of 4.46; the high-tech industry and other industries both have the lowest, 4.32 points; the ratings of traditional manufacturing and service industries are 4.36 points, which is in the middle level.

Compared with 2021, the construction industry's rating on China's business environment has increased the most in 2022 (by 0.23 points), followed by the resource industry and service industry with an increase of 0.14 and 0.11 points respectively; other industries' rating has declined significantly (by 0.09 points); the ratings of the traditional manufacturing and high-tech industries have decreased by 0.07 and 0.05 points, respectively.

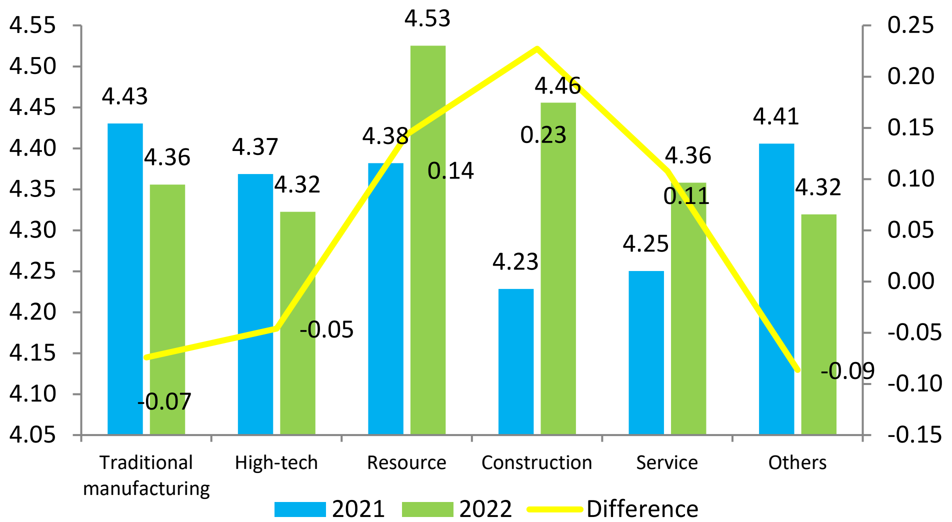


figure1-6 Comparison of Business Environment Ratings of Enterprises of Different Industries by Year

Chapter II Evaluation on the Secondary Indexes of Business Environment

The evaluation system for China's business environment consists of 12 primary indexes such as infrastructure, policy & government administration, social credit and customs service environment and 48 sencondary indexes. The questionnaire survey shows that the enterprises generally rate China's business environment as "good" in 2022, as the scores of six primary indexes have improved compared with 2021.

I. Infrastructure: Higher Evaluation on Environmental Protection Facilities, Improved Evaluation in The Central Region

The infrastructure environment index is sub-divided into five secondary indexes, i.e., transportation, network communications, water, electricity and gas supply, environmental protection facilities, and urban planning and construction. In 2022, infrastructure environment is given a score of 4.40 points, increasing by 0.05 points from 2021 to rank 8th among the 12 primary indexes.

(I) High evaluation on environmental protection facilities and low evaluation on transportation

Among the secondary indexes, environmental protection facilities has the highest score (4.45 points), followed by water, electricity and gas supply (4.42 points); transportation receives the lowest evaluation with 4.35 points; network communications and urban planning and construction are in the middle with 4.41 and 4.38 points respectively.

Compared with 2021, the score of transportation has achieved the greatest increase (0.12 points), followed by urban planning and construction and environmental protection facilities both with an increase of 0.05 points; the score of network communications has increased by 0.03 points; water, electricity and gas supply are the only secondary index under infrastructure environment with negative growth (decreased by 0.01 points).

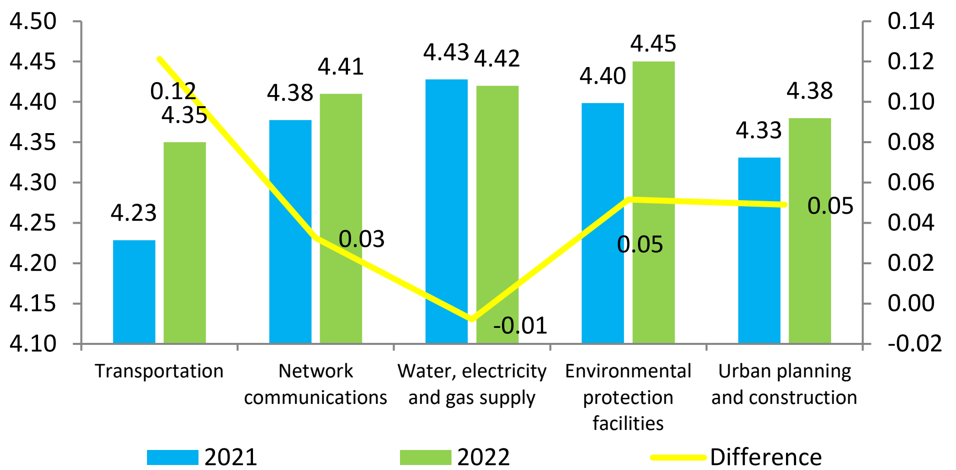


figure2-1-1 Evaluation on Sub-divided Indexes of Infrastructure Environment

(II) High evaluation in central region, declined evaluation in eastern region

Among the regions, the highest rating on infrastructure is received in the central region, at 4.52 points, up 0.08 points from 2021; the rating of the western region is 4.46 points, up 0.31 points from 2021; the eastern region has only given 4.43 points on infrastructure, down 0.1 points from 2021.

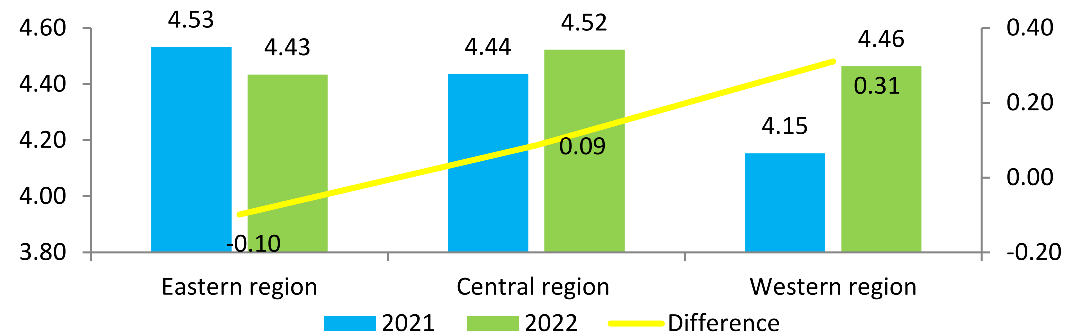


figure2-1-2 Evaluation of Enterprises on Infrastructure Environment in Different Regions

(III) Sino-foreign joint ventures and cooperative enterprises have given higher ratings, while those of private enterprises are lower

Enterprises of different ownerships have certain differences in the evaluation of the infrastructure environment. Sino-foreign joint ventures and cooperative enterprises have given the highest ratings (4.51 points), followed by state-owned enterprises, wholly foreign-owned enterprises, and other enterprises (4.50 points), while private enterprises have given the lowest (4.46 points).

Compared with 2021, enterprises of other ownerships have increased their ratings the most, by 0.36 points, followed by state-owned enterprises and private enterprises (whose ratings both have increased by 0.12 points). The ratings of wholly foreign-owned enterprises and Sino-foreign joint ventures and cooperative enterprises have increased by 0.02 and 0.04 points respectively.

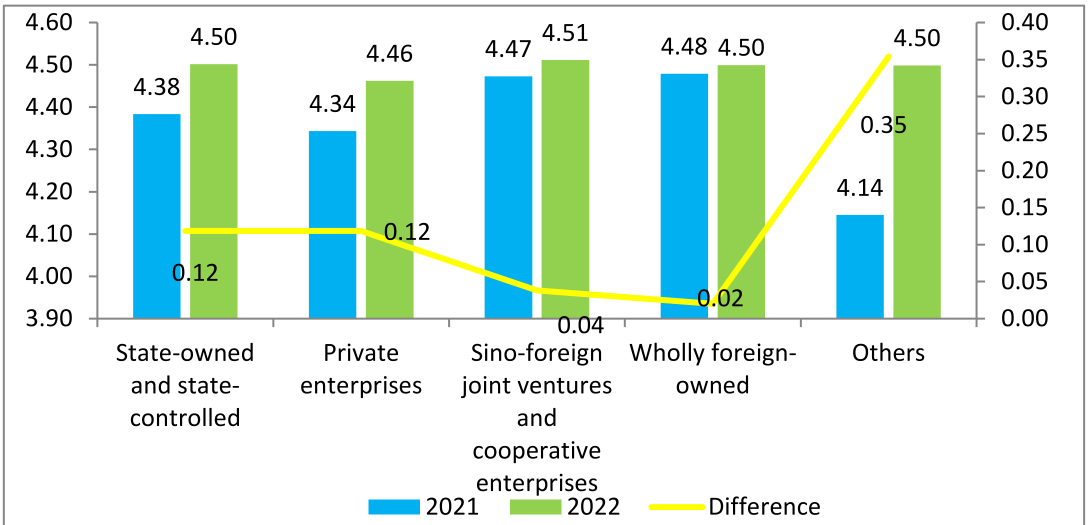


figure2-1-3 Evaluation of Enterprises of Different Ownerships on Infrastructure Environment

(IV) The rating of the resource industry is high, and that of the high-tech industry is low

Among the industries, the resource industry has the highest rating on the infrastructure environment, with 4.63 points, followed by the construction industry, with 4.57 points; the high-tech industry has the lowest, with 4.41 points; the ratings of the service industry, traditional manufacturing industry and other industries are in the middle with 4.54 points, 4.46 points and 4.44 points respectively.

Compared with 2021, the construction and resource industries have increased their ratings significantly by 0.37 and 0.30 points respectively in 2022, followed by the service industry (whose rating has increased by 0.27 points); the ratings of the high-tech industry, other industries and traditional manufacturing industry have slightly increased by 0.09, 0.08 and 0.06 points respectively.

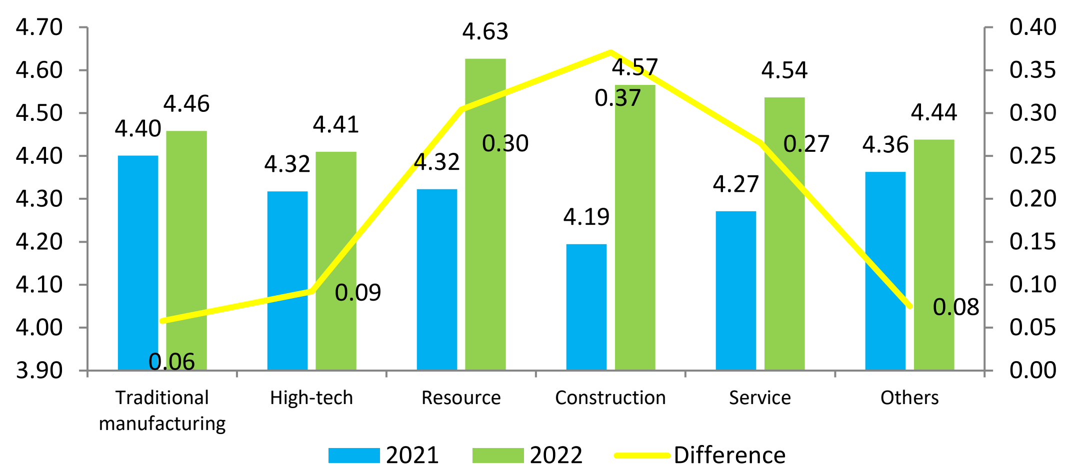


figure2-1-4 Evaluation of Enterprises of Different Industries on Infrastructure Environment

II. Life-Support Service: Higher Evaluation on Environmental Protection, Lower in Sports Facilities

The life-support service environment index is sub-divided into six secondary indexes, i.e., living conditions, health care, sports facilities, education level, environmental protection and public security. In 2022, life-support service environment is given a score of 4.30 points, increasing by 0.05 points from 2021 to rank 10th among the 12 primaryl indexes.

(I) Highest evaluation on environmental protection, low evaluation on sports facilities

Among the secondary indexes, environmental protection has the highest score (4.40 points), while sports facilities have the lowest (4.23 points); the scores of living conditions, education level, public security, and health care are 4.32 points, 4.30 points, 4.27 points, and 4.25 points, respectively.

Compared with 2021, the score of education level has increased most (by 0.09 points), and that of environmental protection has increased by 0.04 points; the rating on sports facilities has remained the same; the evaluations on public security, living conditions and health care have all shown negative growth, decreasing by 0.26, 0.04 and 0.03 points respectively.

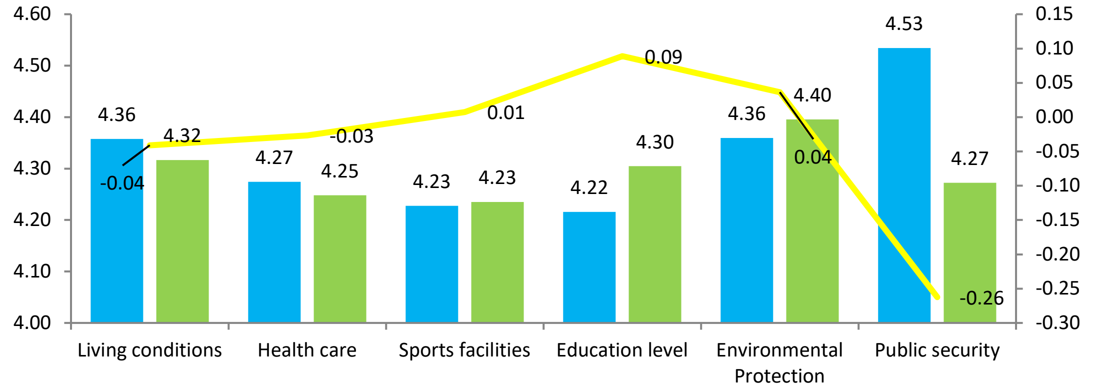


figure2-2-1 Evaluation on Sub-divided Indexes of Life-support Service Environment

(II) High evaluation in central region and low evaluation in eastern region

Among the regions, the highest rating on life-support service environment is received in the central region, at 4.35 points, down 0.08 points from 2021; the rating of the western region is 4.31 points, up 0.17 points from 2021; the evaluation of the eastern region has dropped by 0.26 points from 2021 to 4.21 points only.

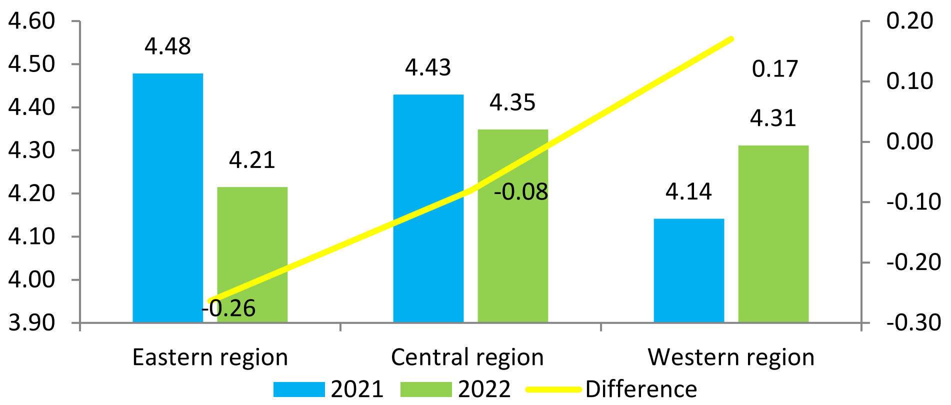


figure2-2-2 Evaluation of Enterprises on Life-support Service Environment in Different Regions

(III) Enterprises of other ownerships have given higher ratings, while those of state-owned and state-controlled enterprises are lower

Among different types of enterprises, enterprises of other ownerships have given the highest ratings on life-support service environment (4.44 points), followed by wholly foreign-owned enterprises (4.33 points), Sino-foreign joint ventures and cooperative enterprises (4.30 points) and private enterprises (4.29 points), while state-owned enterprises have given the lowest (4.28 points).

Compared with 2021, enterprises of other ownerships have increased their ratings the most, by 0.27 points. The ratings of Sino-foreign joint ventures and cooperative enterprises, wholly foreign-owned enterprises, state-owned enterprises and private enterprises have all fallen down by 0.14, 0.10, 0.08 and 0.03 points, respectively.

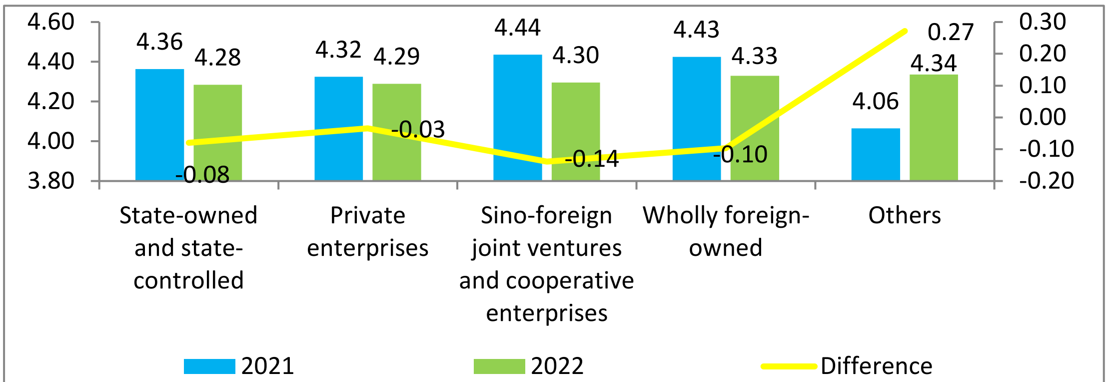


figure2-2-3 Evaluation of Enterprises of Different Ownerships on Life-support Service Environment

(IV) The rating of the construction industry is high, and that of the high-tech industry is low

Among the industries, the construction industry has the highest rating on the life-support service environment, with 4.47 points, followed by the resource industry, with 4.41 points; the high-tech industry has the lowest, with 4.24 points; the ratings of the service industry, traditional manufacturing industry and other industries are in the middle with 4.37 points, 4.28 points and 4.25 points respectively.

Compared with 2021, the construction and service industries have increased their ratings significantly by 0.33 and 0.12 points respectively, followed by the resource industry (whose rating has increased by 0.08 points); the ratings of the traditional manufacturing industry, other industries and high-tech industry have slightly decreased by 0.09, 0.09 and 0.05 points respectively.

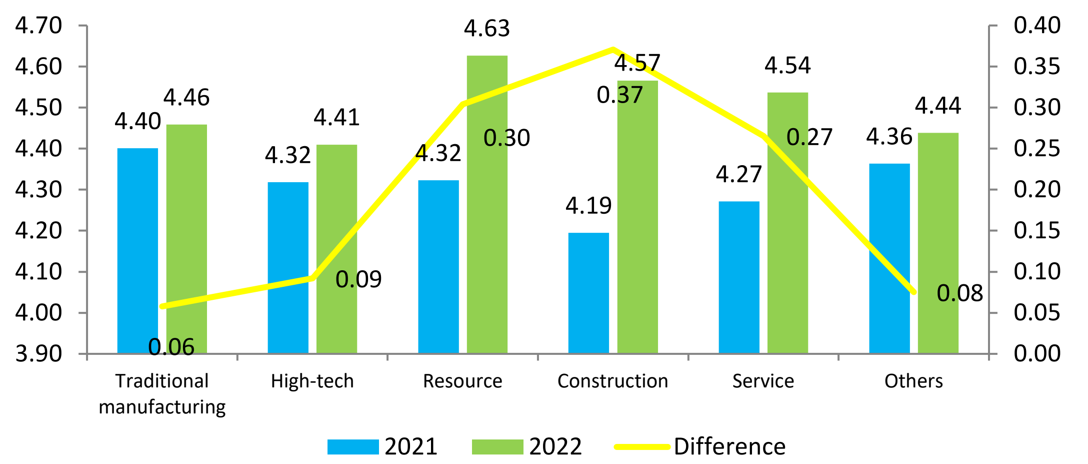


figure2-2-4 Evaluation of Enterprises of Different Industries on Infrastructure Environment

III. Policy and Government Administration: Higher Evaluation on Official Integrity, Improved in Western Region

The policy and government administration environment index is sub-divided into four secondary indexes, i.e., intensity of policy implementation, policy equity, efficiency of government services, and official integrity. In 2022, policy and government administration environment are given a score of 4.37 points, decreasing by 0.08 points from 2021 to rank 9th among the 12 primary indexes.

(I) Highest evaluation on official integrity, low evaluation on intensity of policy implementation

Among the secondary indexes, the score of official integrity is the highest, at 4.40 points, reaching the excellent level, followed by that of efficiency of government services (4.38); the ratings on intensity of policy implementation and policy equity are also good, at 4.36 and 4.37 points respectively.

Compared with 2021, the scores of all four secondary indexes have decreased in 2022, with that of policy equity having the least downfall (0.07 points), followed by that of efficiency of government services (0.08 points); the scores of official integrity and intensity of policy implementation have decreased by 0.12 and 0.09 points respectively.

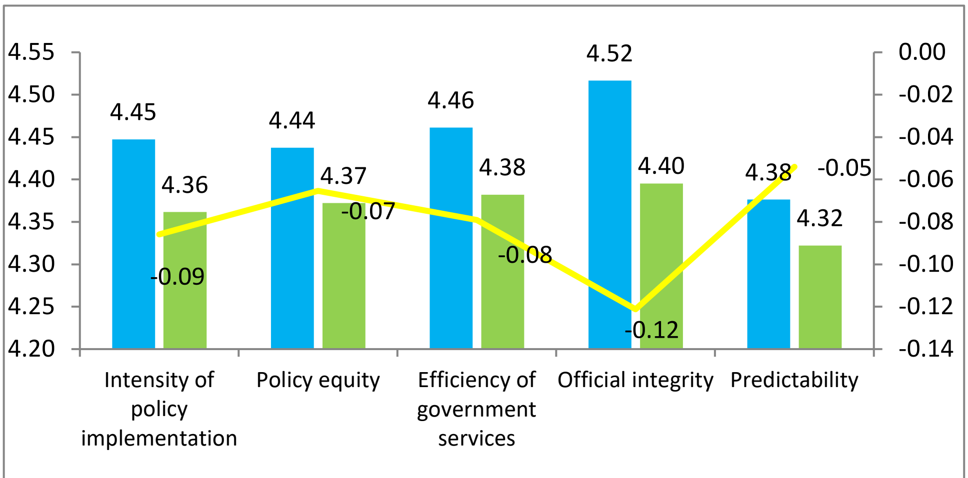


figure2-3-1 Evaluation on Sub-divided Indexes of Policy and Government Administration Environment

(II) Highest evaluation in central region, declined evaluation in eastern region

Among the regions, the highest rating on policy and government administration environment is received in the central region, at 4.43 points, down 0.12 points from 2021; the rating of the western region is 4.38 points, up 0.13 points from 2021; the eastern region has only given 4.28 points, down 0.33 points from 2021.

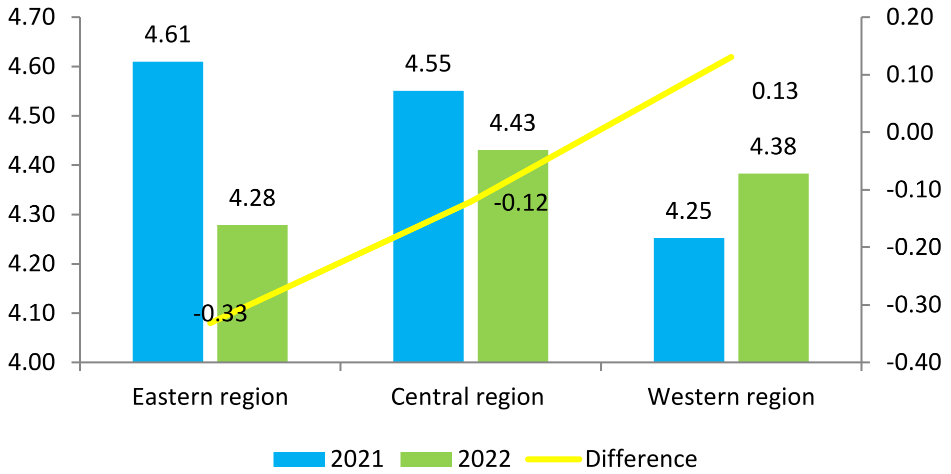


figure2-3-2 Evaluation of Enterprises on Policy and Government Administration Environment in Different Regions

(III) Wholly foreign-owned enterprises and enterprises of other ownerships have given higher ratings, while that of state-owned enterprises is lower

Among different types of enterprises, wholly foreign-owned enterprises and enterprises of other ownerships have given the highest ratings on policy and government administration environment (4.40 points), followed by private enterprises (4.37 points) and Sino-foreign joint ventures and cooperative enterprises (4.34 points), while state-owned enterprises have given the lowest (4.30 points).

Compared with 2021, enterprises of other ownerships in 2022 have increased their ratings by 0.19 points, while private enterprises, wholly foreign-owned enterprises and state-owned enterprises have decreased their ratings by 0.07, 0.12 and 0.20 points respectively. The greatest fall is seen in the rating of Sino-foreign joint ventures and cooperative enterprises, down 0.26 points.

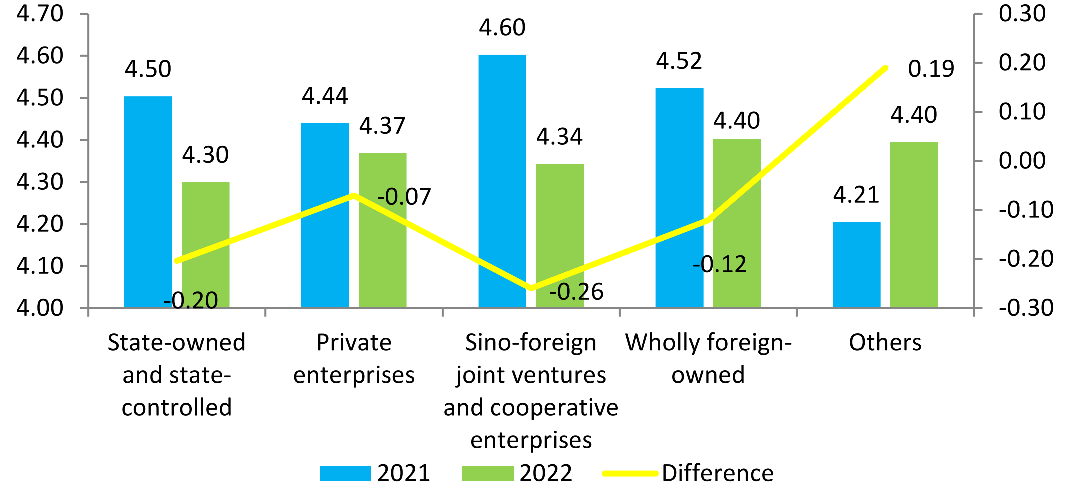


figure2-3-3 Evaluation of Enterprises of Different Ownerships on Policy and Government Administration Environment

(IV) The rating of the resource industry is high, while negative ratings are given by multiple industries

Among the industries, the resource industry has the highest rating on the policy and government administration environment, with 4.51 points, followed by the construction industry, with 4.48 points; the high-tech industry has the lowest, with 4.33 points; the ratings of the service industry, other industries and traditional manufacturing industry are in the middle with 4.40, 4.36 and 4.34 points respectively.

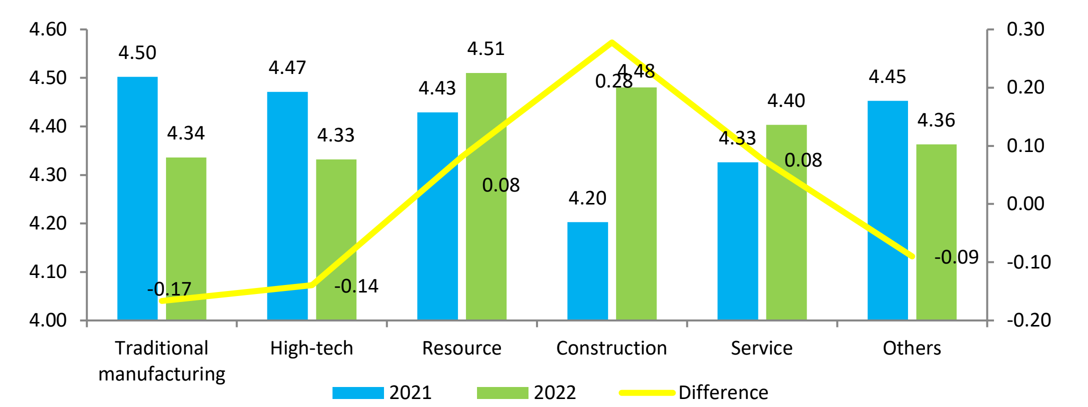


figure2-3-4 Evaluation of Enterprises of Different Industries on Policy and Government Administration Environment

Compared with 2021, the construction industry has increased their ratings significantly by 0.28 points in 2022, followed by the resource and service industries (whose ratings both have increased by 0.08 points); the ratings of the traditional manufacturing industry, high-tech industry, and other industries have dropped by 0.17, 0.14 and 0.09 points respectively.

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

The social credit environment index is sub-divided into three secondary indexes, i.e., social credit, construction of credit system, and construction of punishment and reward mechanism. In 2022, the surveyed enterprises rate the social credit environment as generally good (4.53 points), which ranks 1st among the 12 primary indexes.

(I) High evaluation on social credit, construction of punishment and reward mechanism to be strengthened

Among the secondary indexes, the score of social credit is the highest, at 4.53 points, followed by that of construction of credit system (4.52 points), both reaching the excellent level. Construction of punishment and reward mechanism is lowly rated at 4.47 points.

Compared with 2021, the construction of credit system has realized the greatest improvement (0.14 points) in 2022, followed by the construction of punishment and reward mechanism (0.11 points). The score of social credit has increased by 0.07 points.

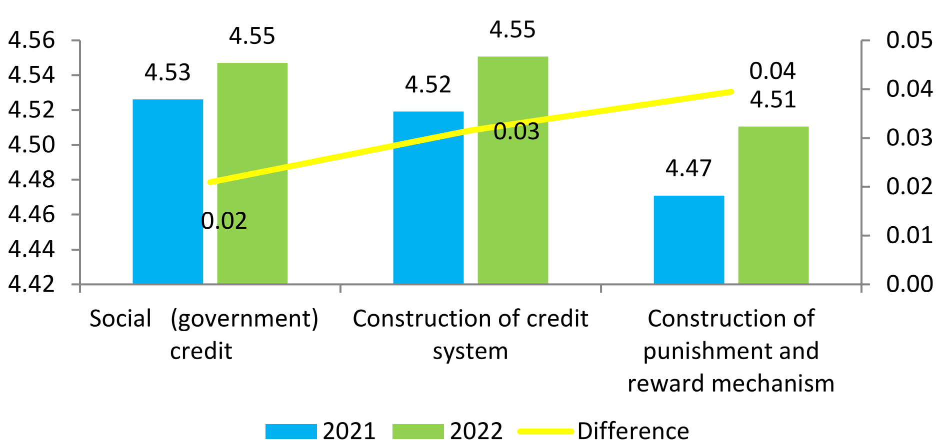


figure2-4-1 Evaluation on Sub-divided Indexes of Social Credit Environment

(II) Much increased rating in western region, declined evaluation in eastern region

Among the regions, the highest rating on social credit environment is received in the central region, at 4.59 points, up 0.01 points from 2021; the rating of the western region is 4.52 points, up 0.20 points from 2021; the rating of the eastern region is 4.50 points only, down 0.17 points from 2021.

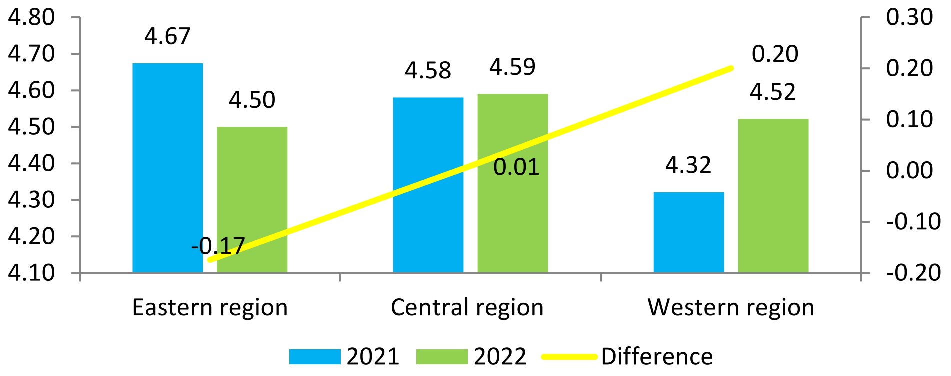


figure 2-4-2 Evaluation of Enterprises on Social Credit Environment in Different Regions

(III) Sino-foreign joint ventures and cooperative enterprises have given highest ratings, while those of private enterprises are in the middle

Among different types of enterprises, Sino-foreign joint ventures and cooperative enterprises have given the highest ratings on social credit environment (4.60 points), followed by enterprises of other ownerships (4.58 points), wholly foreign-owned enterprises (4.57 points), and state-owned enterprises (4.55 points), while private enterprises have given the lowest (4.52 points).

Compared with 2021, enterprises of other ownerships have increased their ratings the most, by 0.27 points, followed by private enterprises, state-owned enterprises and wholly foreign-owned enterprises (whose ratings have increased by 0.02, 0.01 and 0.01 points respectively). The ratings of Sino-foreign joint ventures and cooperative enterprises have gone down by

0.05 points.

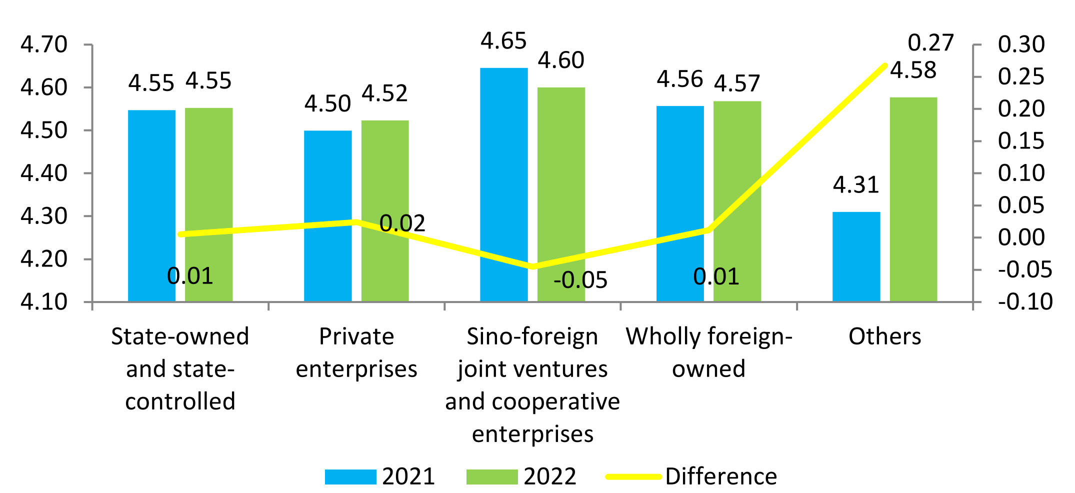


figure 2-4-3 Evaluation of Enterprises of Different Ownerships on Social Credit Environment

(IV) The rating of the construction industry has improved significantly, while three industries have decreased theirs

Among the industries, the construction industry has the highest rating on the social credit environment, with 4.65 points, followed by the resource and service industries with 4.62 and 4.57 points respectively; the high-tech industry has the lowest, with 4.49 points; the ratings of the traditional manufacturing industry and other industries are in the middle, with 4.53 points and 4.51 points respectively.

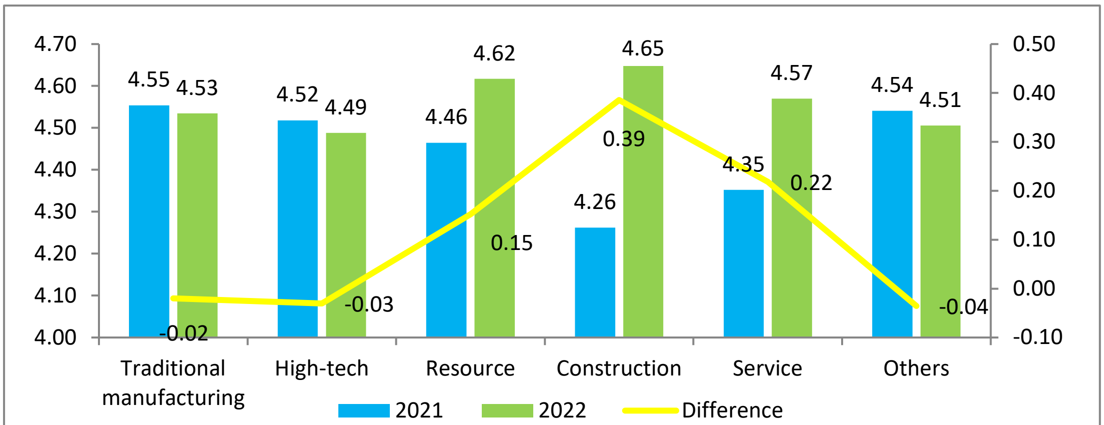


figure 2-4-4 Evaluation of Enterprises of Different Industries on Social Credit Environment

Compared with 2021, the construction and service industries have increased their ratings significantly by 0.39 and 0.22 points in 2022, followed by the resource industry (whose rating has increased by 0.15

points); the ratings of the traditional manufacturing industry, high-tech industry, and other industries have dropped by 0.02, 0.03 and 0.04 points respectively.

V. Fair Competition: High Evaluation on Market Supervision, Evaluations on Secondary Indexes Generally Improved

The fair competition environment index is sub-divided into four secondary indexes, i.e., market supervision, administrative monopoly governance, government procurement and market access. The surveyed enterprises have generally rated the fair competition environment as satisfactory, and with the score of 4.46 points, it ranks 5th among the 12 primary indexes.

(I) High evaluation on market supervision, low evaluation on government procurement and administrative monopoly governance

Among the secondary indexes, market supervision has scored the highest, at 4.50 points, followed by market access at 4.48 points; the scores of government procurement and administrative monopoly governance are low, at 4.45 and 4.44 points respectively.

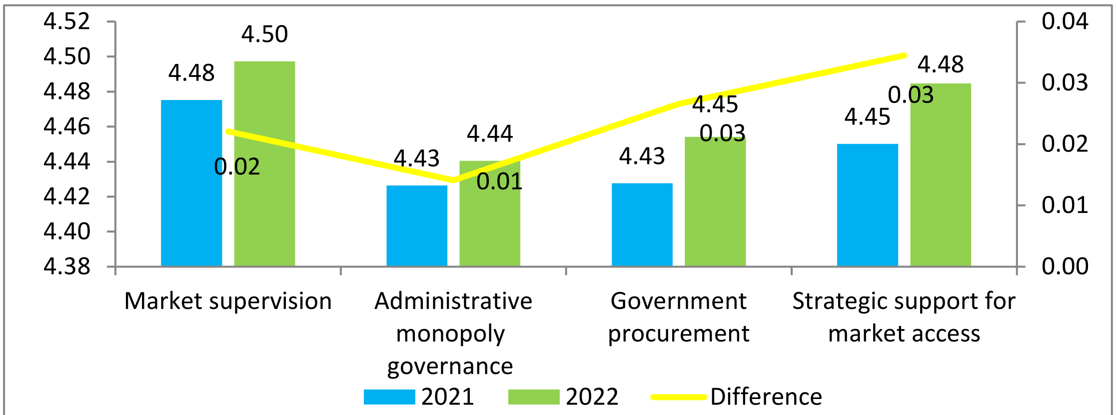


figure 2-5-1 Evaluation on Sub-divided Indexes of Fair Competition Environment

Compared with 2021, government procurement and market access has realized the greatest improvement (0.03 points) in 2022, followed by market supervision (0.02 points). The score of administrative monopoly governance has increased slightly by 0.01 points.

(II) High evaluation in central region, greatly improved evaluation in western region

Among the regions, the highest rating on fair competition environment is received in the central region, at 4.53 points, down 0.01 points from 2021; the rating of the western region has improved the most by 0.19 points to 4.43 points; the rating of the eastern region is 4.42 points only, down 0.20 points from 2021.

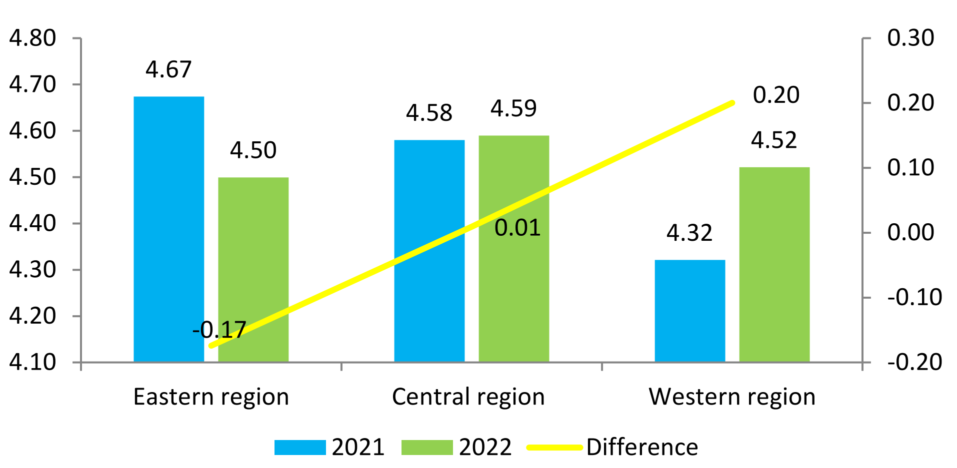


figure 2-5-2 Evaluation of Enterprises on Social Credit Environment in Different Regions

(III) Ratings of enterprises of other ownerships have increased the most, while those of state-owned and Sino-foreign joint ventures and cooperative enterprises have decreased

Among different types of enterprises, Sino-foreign joint ventures and cooperative enterprises have given the highest ratings on fair competition environment (4.54 points), followed by enterprises of other ownerships (4.50 points), while state-owned enterprises and private enterprises have given the lowest (4.46 and 4.44 points).

Compared with 2021, enterprises of different ownerships have increased their ratings on fair competition environment in 2022. Enterprises of other ownerships in 2022 have increased their ratings the most by 0.33 points, followed by Sino-foreign joint ventures and cooperative enterprises (whose ratings have increased by 0.13 points); the ratings of state-owned enterprises, wholly foreign-owned enterprises and private enterprises have increased by 0.06, 0.02 and 0.01 points respectively.

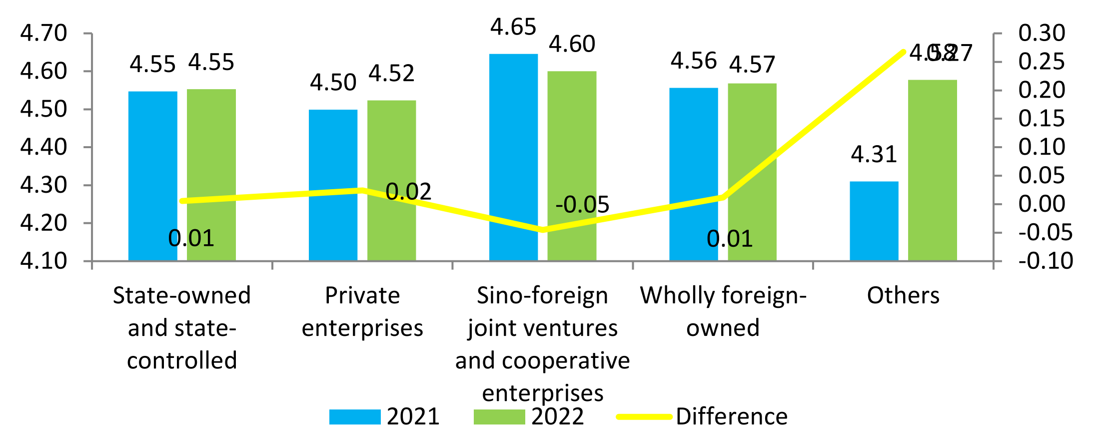


figure 2-5-3 Evaluation of Enterprises of Different Ownerships on Social Credit Environment

(IV) The ratings of the construction industry have increased significantly, while those of the traditional manufacturing industry, high-tech industry and other industries have declined

Among the industries, the resource industry has the highest rating on the fair competition environment, with 4.60 points, followed by the construction and service industries with 4.56 and 4.48 points respectively; the high-tech industry has the lowest, with 4.42 points; the ratings of the traditional manufacturing industry and other industries are in the middle, with 4.45 and 4.43 points respectively.

Compared with 2021, the construction, service and resource industries have increased their ratings significantly by 0.16, 0.20 and 0.34 points in 2022; the ratings of the traditional manufacturing industry, high-tech industry, and other industries have dropped by 0.05, 0.04 and 0.03 points respectively.

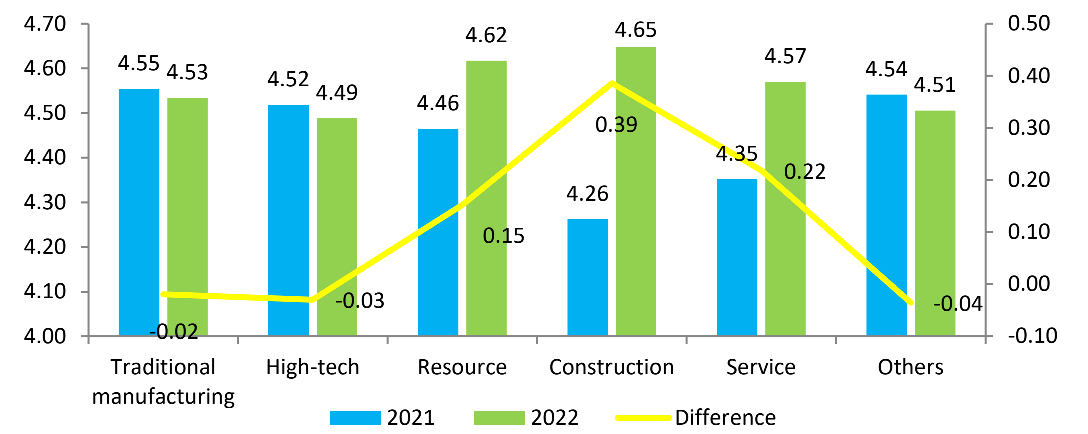


figure2-5-4 Evaluation of Enterprises of Different Industries on Social Credit Environment

VI. Rule of Law: High Evaluation on Legal Supervision and Administration by Law, High Ratings Given by Foreign-capital Enterprises

The rule by law environment index is sub-divided into five secondary indexes, i.e., legal supervision, law-based administration of government, courts' and arbitration courts' conclusion of cases on schedule, enforcement of court judgments and arbitral awards, and intellectual property rights protection. In 2022, the surveyed enterprises rate rule by law environment as generally good (4.50 points), which ranks 3rd among the 12 primary indexes.

(I) Highest evaluation on legal supervision, declined ratings on most secondary indexes

Among the secondary indexes, legal supervision has the highest score of 4.52 points, followed by law-based administration of government and intellectual property rights protection with 4.52 and 4.50 points; the scores of courts' and arbitration courts' conclusion of cases on schedule and enforcement of court judgments and arbitral awards are low, at 4.48 and 4.47 points respectively.

Compared with 2021, the score of enforcement of court judgments and arbitral awards has decreased the most (by 0.02 points), followed by those of law-based administration of government and courts' and arbitration courts' conclusion of cases on schedule (both by 0.01 points). The ratings on legal supervision and intellectual property rights protection remain the same as in 2021.

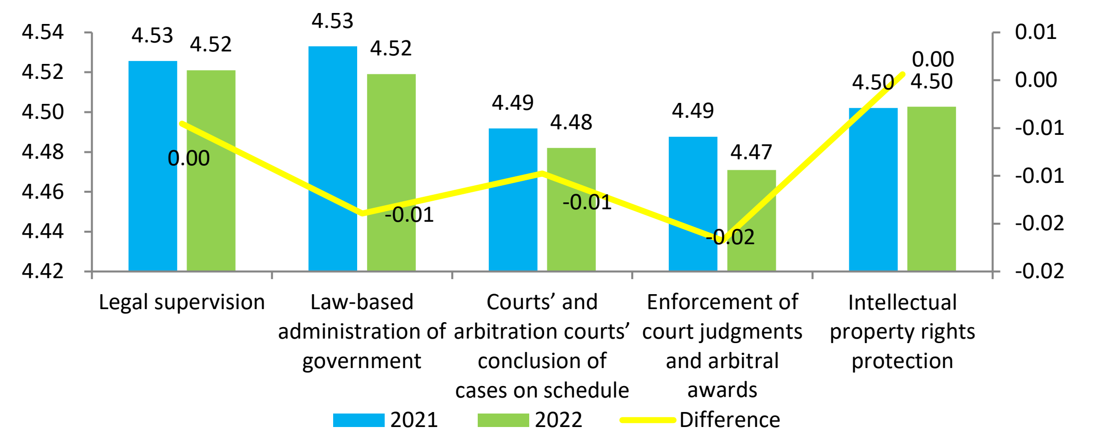


figure2-6-1 Evaluation on Sub-divided Indexes of Rule by Law Environment

(II) High evaluation in central region, declined evaluation in eastern region

Among the regions, the highest rating on rule by law environment is received in the central region, at 4.54 points; the rating of the western region is 4.49 points, in the middle; and the rating of the eastern region is 4.47 points only.

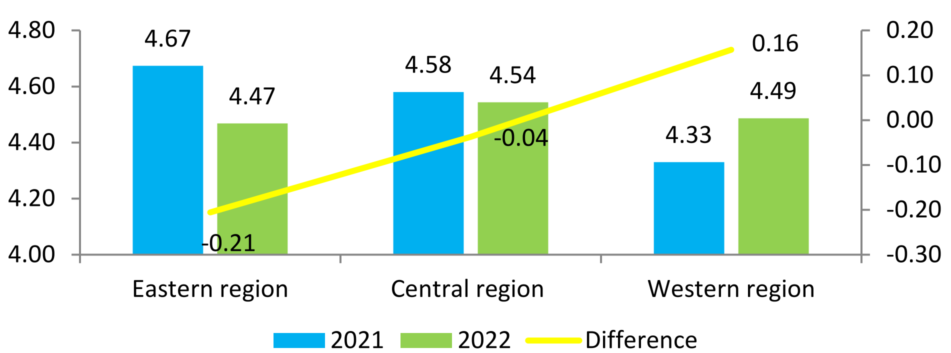


figure2-6-2 Evaluation of Enterprises on Rule by Law Environment in Different Regions

Compared with 2021, the rating of the western region has increased by 0.16 points, that of the central region has decreased by 0.04 points, and that of the eastern region has decreased by 0.21 points.

(III) Wholly foreign-owned enterprises have given higher ratings, while those of private enterprises are lower

Among different types of enterprises, wholly foreign-owned enterprises have given the highest ratings on rule by law environment (4.56 points), followed by Sino-foreign joint ventures and cooperative enterprises (4.54 points) and enterprises of other ownerships (4.54 points), while private enterprises (4.49 points) state-owned enterprises (4.50 points) have given the lowest.

Compared with 2021, enterprises of other ownerships have increased their ratings the most, by 0.29 points. The ratings of Sino-foreign joint ventures and cooperative enterprises, state-owned enterprises, private enterprises and wholly foreign-owned enterprises are have all fallen down by 0.13, 0.06, 0.02 and 0.01 points, respectively.

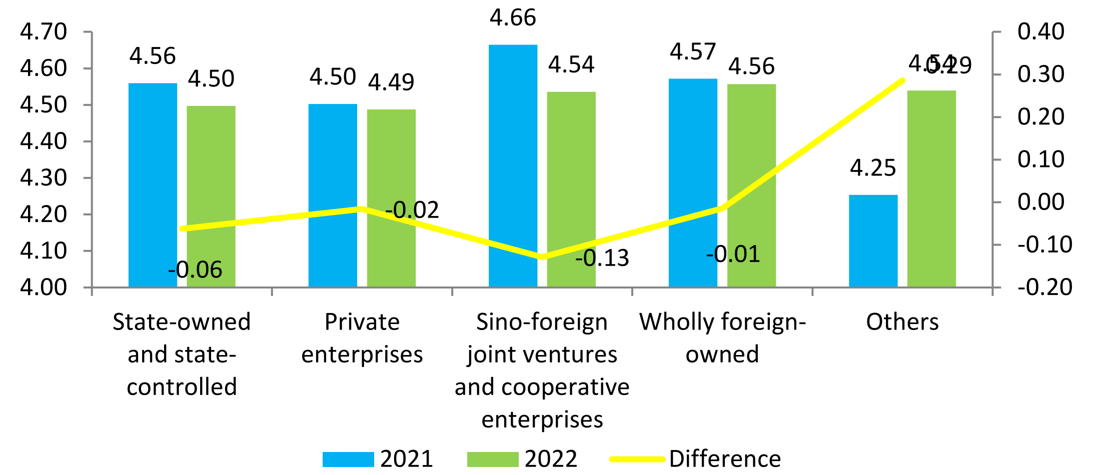


figure2-6-3 Evaluation of Enterprises of Different Ownerships on Rule by Law Environment

(IV) The rating of the construction industry is high, and that of the high-tech industry is low

Among the industries, the construction industry has the highest rating on the rule by law environment, with 4.62 points, followed by the resource and service industries with 4.59 and 4.53 points respectively; the high-tech industry has the lowest, with 4.44 points; the ratings of the traditional manufacturing industry and other industries are in the middle, with 4.51 and 4.45 points respectively.

Compared with 2021, the construction industry has increased their ratings the most by 0.30 points respectively in 2022, followed by the service and resource industries (whose ratings have increased by 0.17 and 0.09 points respectively). The ratings of other industries, the high-tech industry and traditional manufacturing industry have all declined by 0.08, 0.07 and 0.04 points, respectively.

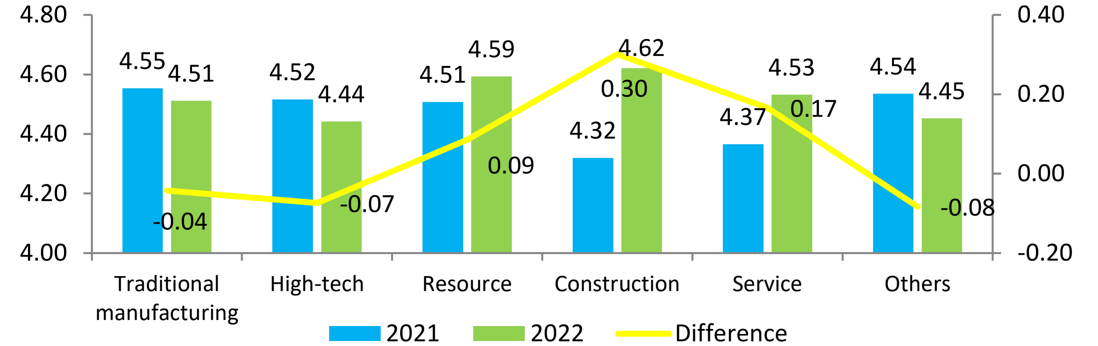


figure 2-6-4 Evaluation of Enterprises of Different Industries on Rule by Law Environment

VII. Technological Innovation: Similar Evaluation on secondary Indexes, Evaluation on State-Owned Enterprises Increased Most

The technological innovation environment index is sub-divided into five secondary indexes, i.e., implementation of R&D tax credit policy, intellectual property collateralization, industry-university-research combination, business incubation service, and public service platform construction. In 2022, technological innovation environment is given a score of 4.45 points, ranking 6th among the 12 primary indexes.

(I) Close evaluations on secondary indexes, implementation of R&D tax credit policy highly rated

The scores of the five secondary indexes of technological innovation environment are close. Among them, the score of implementations of R&D tax credit policy is the highest, at 4.47 points, followed by that of public service platform construction (4.46 points); the scores of intellectual property collateralization and industry-university-research combination are slightly lower, at 4.45 and 4.44 points, respectively.

Compared with 2021, the ratings on industry-university-research combination and public service platform construction in 2022 has increased the most, both by 0.03 points, followed by those of business incubation service (by 0.02 points) and intellectual property collateralization (by 0.01 points). The score of implementations of R&D tax credit policy remains the same as that in 2021.

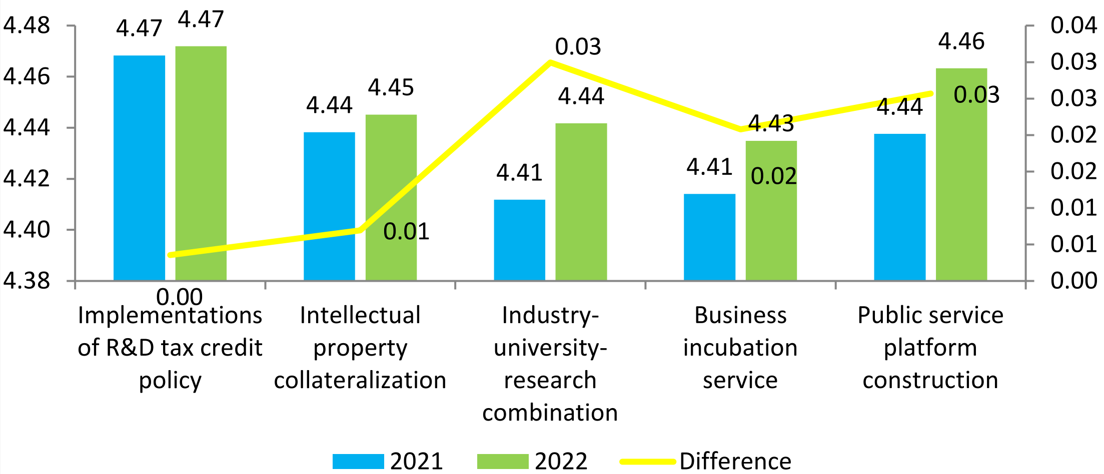


figure 2-7-1 Evaluation on Sub-divided Indexes of Technological Innovation Environment

(II) Evaluation in western region improved greatly, declined evaluation in eastern and central regions

Among the regions, the highest rating on technological innovation is received in the central region, at 4.50 points; the rating of the western region is lower at 4.44 points; and the rating of the eastern region has declined, at 4.42 points only.

Compared with 2021, the rating of the western region has increased by 0.20 points, that of the central region has decreased by 0.03 points, and that of the eastern region has decreased by 0.19 points.

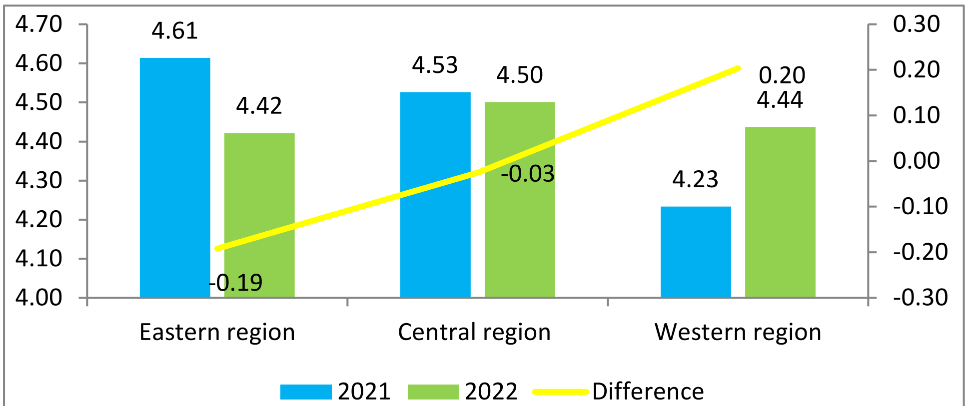


figure 2-7-2 Evaluation on Sub-divided Indexes of Technological Innovation Environment

(III) Sino-foreign joint ventures and cooperative enterprises have given the highest ratings, while those of other ownerships are low

Among different types of enterprises, Sino-foreign joint ventures and cooperative enterprises have given the highest ratings on technological innovation environment (4.58 points), followed by wholly foreign-owned enterprises (4.52 points), enterprises of other ownerships (4.49 points), and state-owned enterprises (4.47 points), while private enterprises have given the lowest (4.44 points).

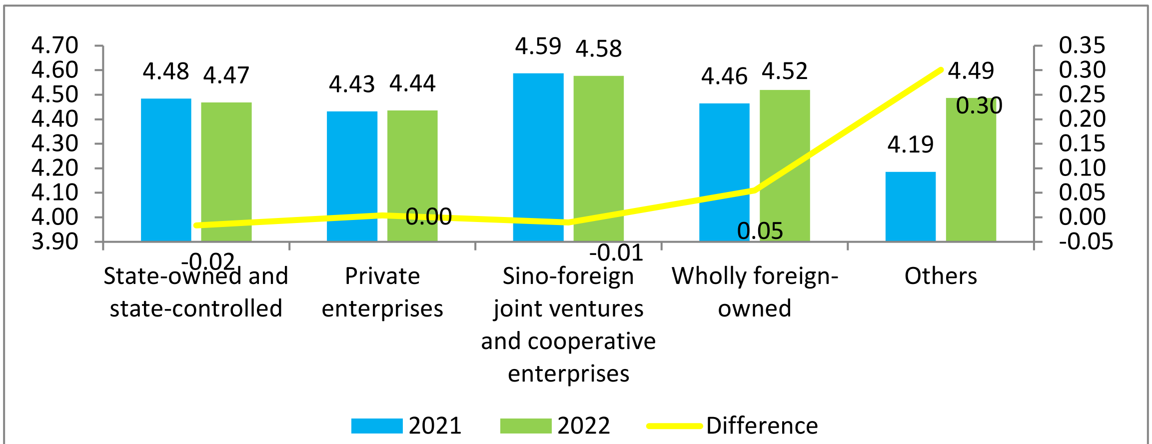


figure 2-7-3 Evaluation of Enterprises of Different Ownerships on Technological Innovation Environment

Compared with 2021, enterprises of other ownerships in 2022 have increased their ratings the most by 0.30 points, followed by wholly foreign-owned enterprises (whose ratings have increased by 0.05 points); the ratings of state-owned enterprises and Sino-foreign joint ventures and cooperative enterprises have decreased by 0.02 and 0.01 points respectively. The ratings of private enterprises are the same as those in 2021.

(IV) The rating of the resource industry is high, while ratings of three industries have declined

Among the industries, the resource industry has the highest rating on the technological innovation environment, with 4.58 points, followed by the construction, service, and traditional manufacturing industries with 4.56, 4.48 and 4.46 points respectively; the high-tech industry and other industries have given lower ratings, with 4.44 and 4.40 points respectively.

Compared with 2021, the construction, service and resource industries have increased their ratings significantly by 0.33, 0.20 and 0.16 points in 2022; the ratings of the traditional manufacturing industry, high-tech industry, and other industries have declined by 0.03, 0.02 and 0.06 points respectively.

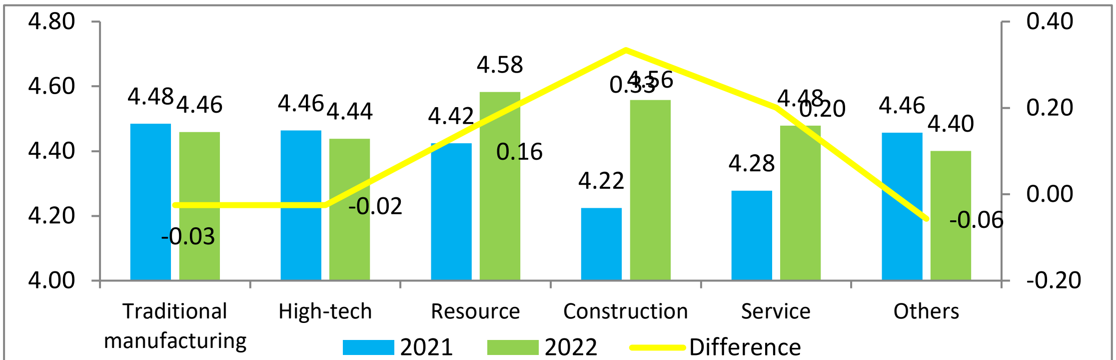


figure 2-7-4 Evaluation of Enterprises of Different Industries on Technological Innovation Environment

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

The human resources environment index is sub-divided into four secondary indexes, i.e., availability of skilled labor, availability of middle and senior managers, availability of innovative and entrepreneurial talents, and availability of specialized talents. In 2022, human resource environment ranks the last among the 12 primary indexes, with only 4.06 points.

(I) High evaluation on availability of skilled labor, low evaluation on availability of innovative and entrepreneurial talents

Among the secondary indexes, availability of skilled labor has the highest score of 4.12 points, followed by availability of middle and senior managers and availability of specialized talents, with 4.08 and 4.06 points, while the rating on availability of innovative and entrepreneurial talents is the lowest, at 4.01 points only.

Compared with 2021, the availability of innovative and entrepreneurial talents has improved the most (by 0.04 points) in 2022; the availability of middle and senior managers and specialized talents have improved to some extent (by 0.03 and 0.02 points); and the availability of skilled labor has improved slightly (by 0.01 points).

According to the surveyed enterprises, in 2022, labor costs account for 26.75% of the total costs, up 0.48% from 2021, and the average annual increase in labor costs is 9.46%, up 1.46% from 2021.

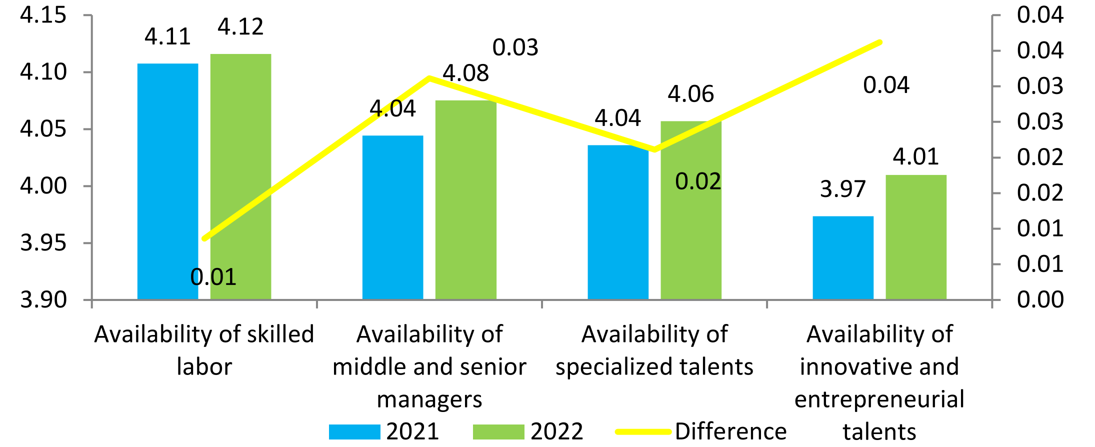


figure 2-8-1 Evaluation on Sub-divided Indexes of Human Resources Environment

(II) Evaluation improved significantly in western region, lowest evaluation in eastern region

Among the regions, the highest rating on human resources environment is received in the western region, at 4.09 points, up 0.18 points from 2021; the rating of the central region is 4.08 points, down 0.03 points from 2021; and enterprises in the eastern region have only given 4.00 points, down 0.15 points from 2021.

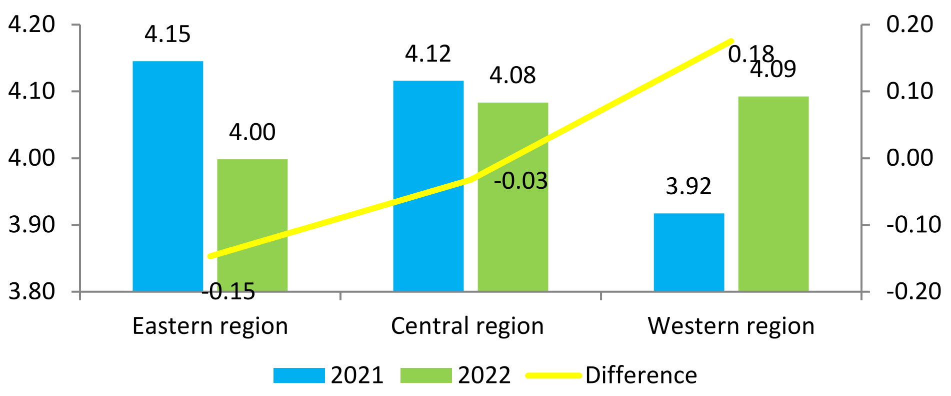


figure 2-8-2 Evaluation of Enterprises on Human Resources Environment in Different Regions

(III) Enterprises of other ownerships have given higher ratings, while those of Sino-foreign joint ventures and cooperative enterprises are lower

Among different types of enterprises, enterprises of other ownerships have given the highest ratings on fair competition environment (4.18 points), followed by wholly foreign-owned enterprises (4.12 points), while Sino-foreign joint ventures and cooperative enterprises have given the lowest (4.03 points only). The ratings of state-owned enterprises and private enterprises are in the middle level, at 4.09 and 4.05 points respectively.

Compared with 2021, enterprises of other ownerships have increased their ratings the most, by 0.16 points, followed by Sino-foreign joint ventures and cooperative enterprises and private enterprises (whose ratings both have increased by 0.06 and 0.02 points). The ratings of state-owned enterprises have gone down by 0.08 points. The ratings of wholly foreign-owned enterprises remain the same as in 2021.

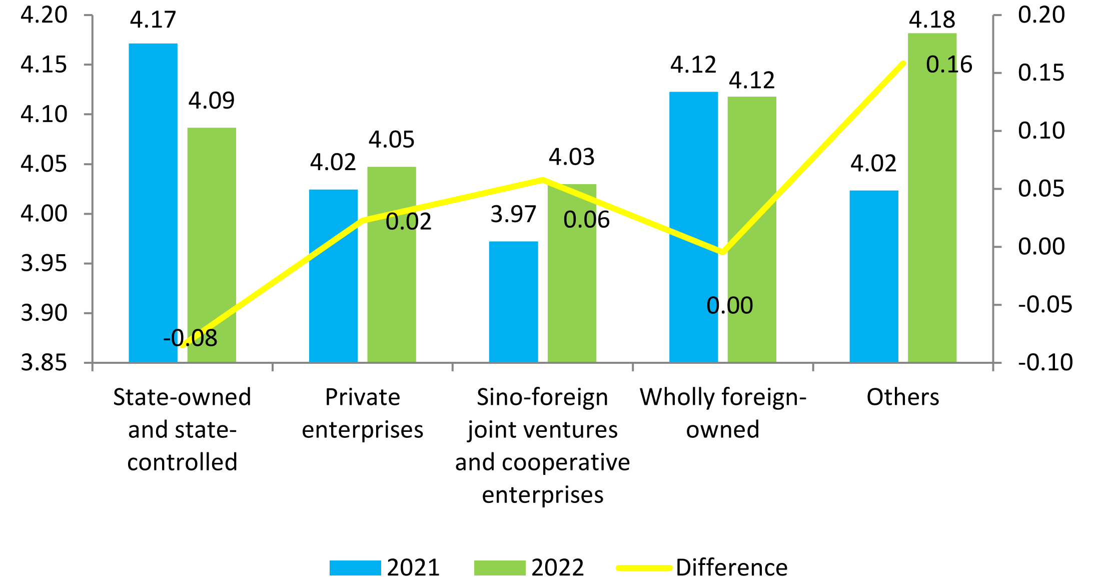


figure 2-8-3 Evaluation of Enterprises of Different Ownerships on Human Resources Environment

(IV) The rating of the construction industry is highest, and that of the high-tech industry is lowest

Among the industries, the construction industry has the highest rating on the human resources environment, with 4.24 points, followed by the resource industry, with 4.22 points; the high-tech industry has the lowest, with 3.90 points; the ratings of the service industry, traditional manufacturing industry and other industries are in the middle with 4.15, 4.03 and 4.07 points respectively.

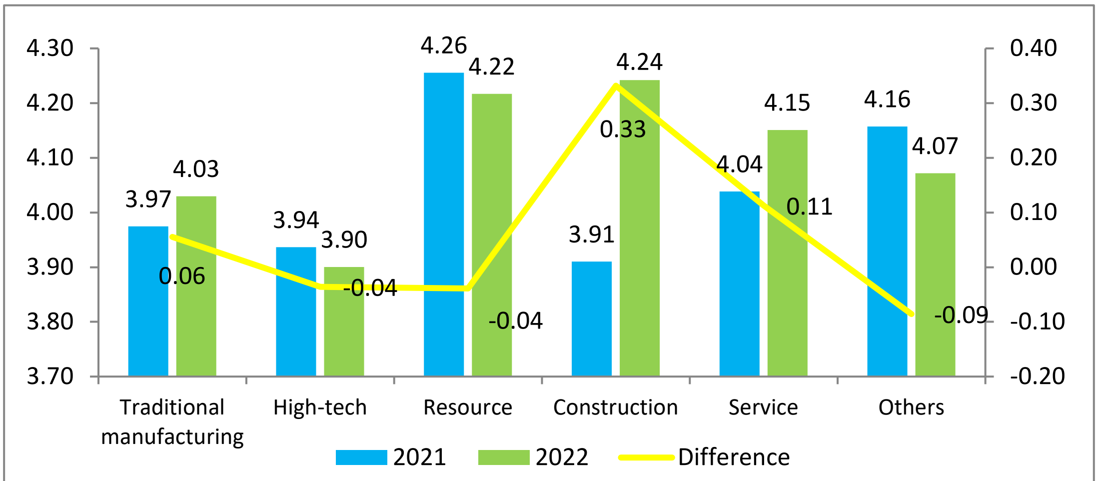


figure 2-8-4 Evaluation of Enterprises of Different Industries on Human Resources Environment

Compared with 2021, the construction industry has increased their ratings the most, by 0.33 points in 2022; the ratings of the traditional manufacturing and service industries have improved slightly, by 0.06 and 0.11 points respectively; and the ratings of the high-tech industry, other industries and resource industry have declined by 0.04, 0.04 and 0.09 points respectively.

IX. Financial Service: Second-To-Last Index, Annual Increase of Financing Costs Decreased

The financial service environment index is sub-divided into two secondary indexes, i.e., financing convenience and diversity of financing channels. In 2022, the overall evaluation on the financial service environment by the surveyed enterprises is low, at 4.11 points, ranking 11th among the 12 primary indexes.

(I) Low ratings on secondary indexes with little difference

From the perspective of secondary indexes, the ratings on financing convenience and diversity of financing channels are 4.13 and 4.10 points. Compared with 2021, the scores of both indexes have declined in 2022, with financing convenience decreasing by 0.05 points and diversity of financing channels by 0.06 points.

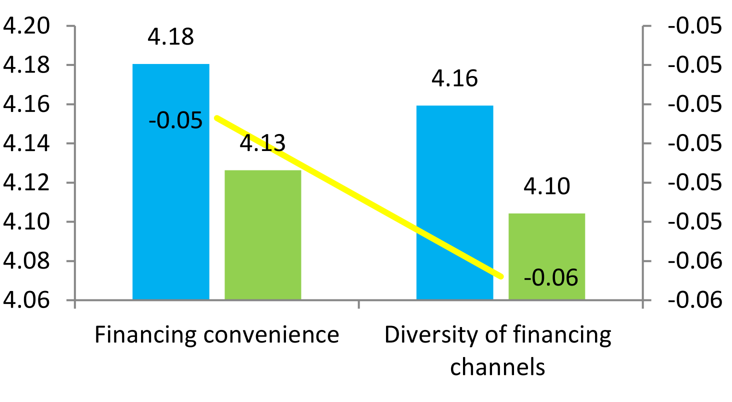


figure 2-9-1 Evaluation on Sub-divided Indexes of Financial Service Environment

The financing cost rate (financing cost as a percentage of total costs) of the surveyed enterprises in 2022 is 13.84%, decreasing by 0.11% compared with 2021.

(II) Evaluation improved significantly in western region, declined evaluation in eastern and central regions

Among the regions, the highest rating on financial service environment is received in the central region, at 4.16 points; the rating of the western region is in the middle level, at 4.11 points; and the rating of the eastern region is 4.08 points only.

Compared with 2021, the rating of the western region on financial service environment has increased the most (by 0.19 points), while those of the central and eastern regions have decreased by 0.30 and 0.16 points.

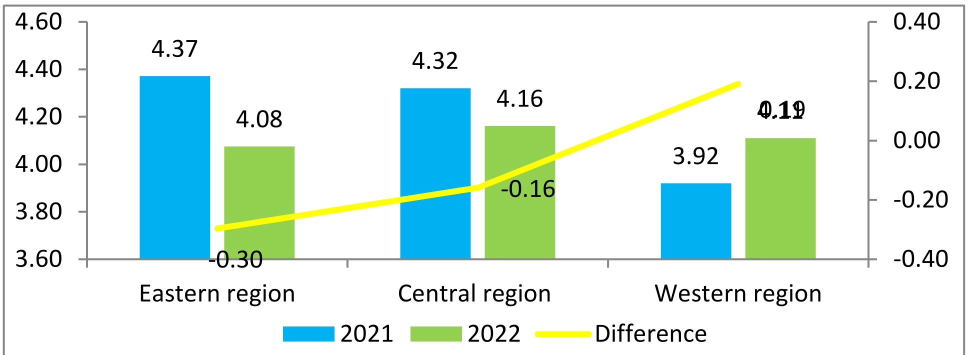


figure2-9-2 Evaluation of Enterprises on Financial Service Environment in Different Regions

(III) Wholly foreign-owned enterprises have given higher ratings, while those of private enterprises are lower

Among different types of enterprises, wholly foreign-owned enterprises have given the highest ratings (4.18 points), followed by state-owned enterprises (4.14 points), enterprises of other ownerships (4.14 points), and Sino-foreign joint ventures and cooperative enterprises (4.12 points), while private enterprises have given the lowest (4.11 points).

Compared with 2021, enterprises of other ownerships have increased their ratings the most, by 0.23 points. The ratings of Sino-foreign joint ventures and cooperative enterprises, wholly foreign-owned enterprises, state-owned enterprises and private enterprises have all fallen down by 0.20, 0.19, 0.17 and 0.04 points, respectively.

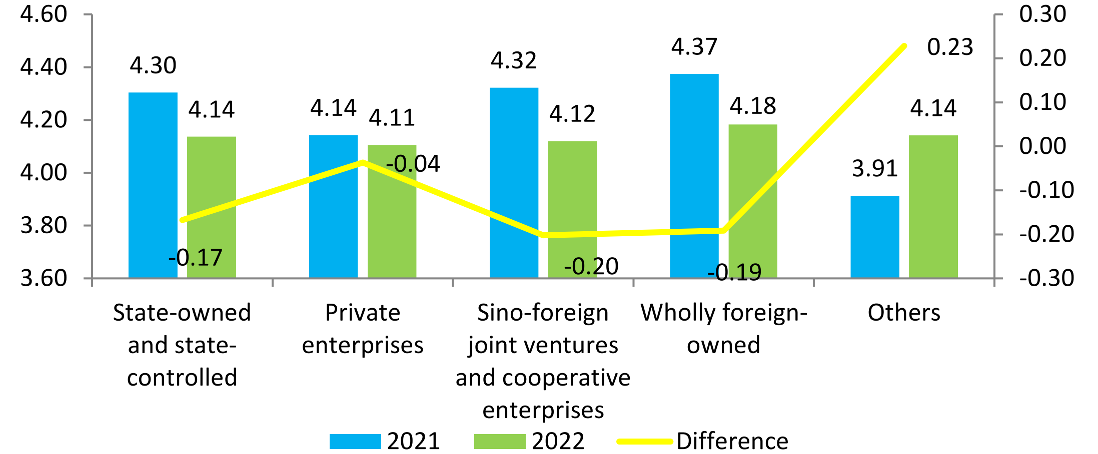


figure2-9-3 Evaluation of Enterprises of Different Ownerships on Financial Service Environment

(IV) High ratings are received from the construction and service industries, and that of the construction industry has been greatly improved

Among the industries, the construction and service industries have the highest ratings on the financial service environment, with 4.18 points, followed by the traditional manufacturing and resource industries with 4.12 and 4.11 points respectively; the high-tech industry has the lowest, with 4.04 points; the ratings of the resource industry and other industries are in the middle level, at 4.11 and 4.09 points respectively.

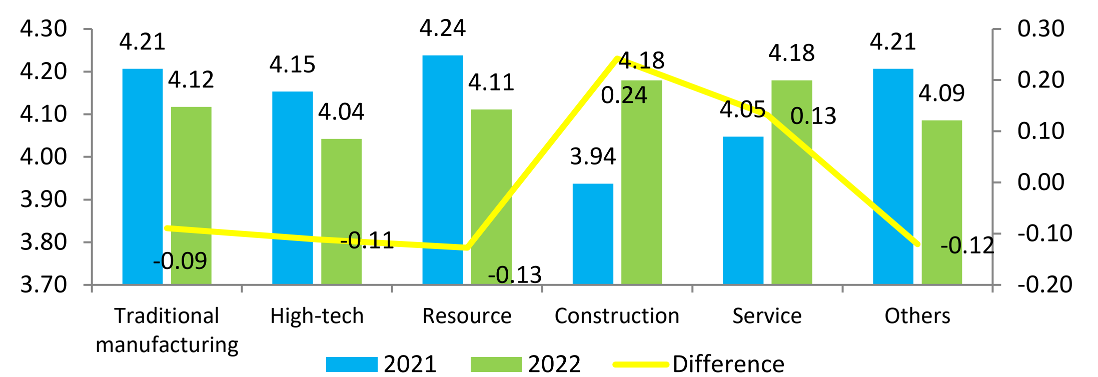


figure 2-9-4 Evaluation of Enterprises of Different Industries on Financial Service Environment

Compared with 2021, the construction and service industries have increased their ratings on the financial service environment significantly by 0.24 and 0.13 points in 2022; the ratings of the resource industry, traditional manufacturing industry, high-tech industry, and other industries have declined by 0.13, 0.12, 0.11 and 0.09 points respectively.

X. Fiscal and Tax Service: Evaluation Ranked Second, With High, Evaluation on secondary Indexes

The fiscal and tax environment index is sub-divided into two secondary indexes, i.e., standardization of fiscal and tax law enforcement and processing time for tax refund. In 2022, the overall rating of enterprises on the fiscal and tax service environment (4.52 points) is high, making it second among the 12 primary indexes.

(I) High ratings on all secondary indexes, but lower than those in 2021

From the perspective of secondary indexes, the scores of standardizations of fiscal and tax law enforcement and processing time for tax refund reach 4.53 and 4.52 points.

Compared with 2021, the score of standardizations of fiscal and tax law enforcement has decreased by 0.01 points in 2022, while that of processing time for tax refund has increased by 0.01 points.

Specifically, according to the surveyed enterprises, the average number of tax payments decreased from 12.55 to 10.34, and the time spent on tax payments rose from 7.25 to 9.37 hours in 2022.

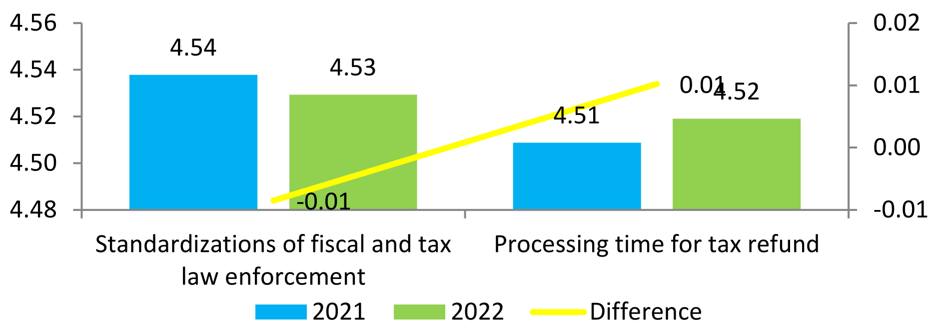


figure 2-10-1 Evaluation on Sub-divided Indexes of Fiscal and Tax Service Environment

(II) Evaluation improved significantly in western region, declined evaluation in eastern region

Among the regions, the highest rating on fiscal and tax service environment is received in the central region, at 4.55 points; the rating of the western region is in the middle level, at 4.52 points; and the rating of the eastern region is the lowest, at 4.50 points only.

Compared with 2021, the rating of the western region on fiscal and tax service environment has increased the most (by 0.19 points), while those of the central and eastern regions have decreased by 0.05 and 0.20 points.

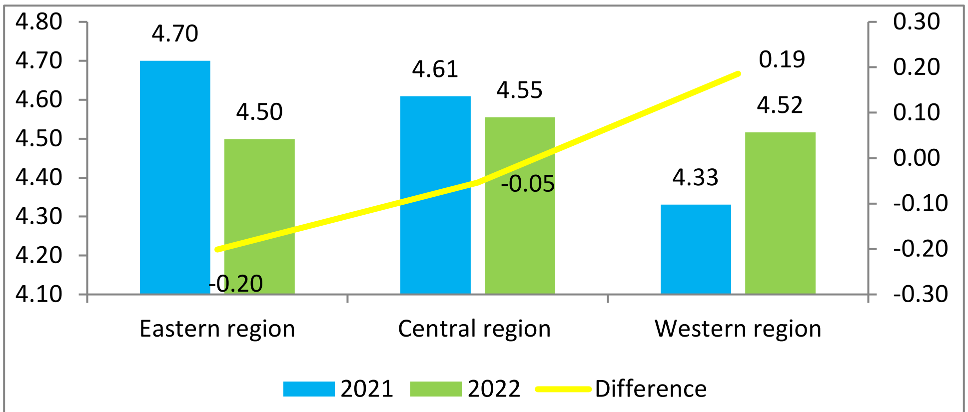


figure 2-10-2 Evaluation of Enterprises on Fiscal and Tax Service Environment in Different Regions

(III) Ratings of enterprises of other ownerships have increased the most, while those of most types of enterprises have decreased

Among different types of enterprises, Sino-foreign joint ventures and cooperative enterprises have given the highest ratings on fiscal and tax service environment (4.62 points), followed by wholly foreign-owned enterprises (4.61 points) and private enterprises (4.52 points), while state-owned enterprises and enterprises of other ownerships have given the lowest (4.47 points).

Compared with 2021, enterprises of other ownerships in 2022 have increased their ratings on fiscal and tax service environment by 0.24 points, while the ratings of Sino-foreign joint ventures and cooperative enterprises, state-owned enterprises and wholly foreign-owned enterprises have decreased by 0.07, 0.05 and 0.02 points respectively. The ratings of private enterprises are the same as those in 2021.

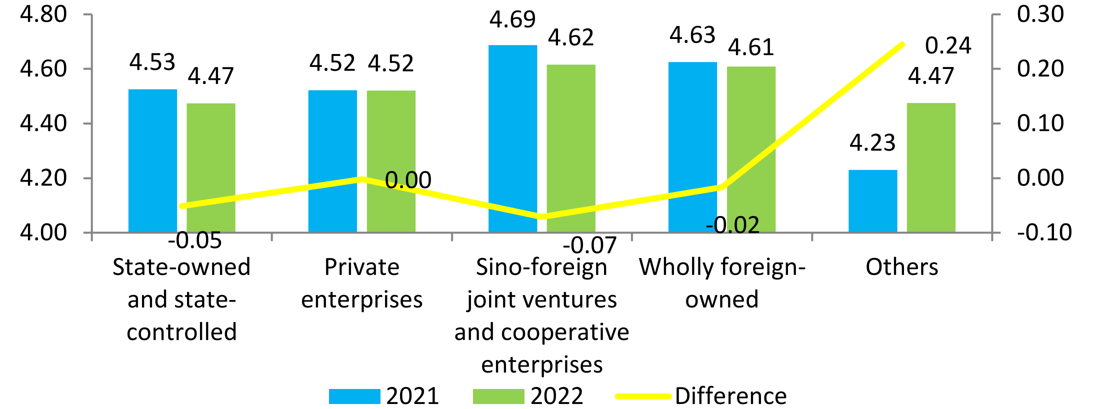


figure 2-10-3 Evaluation of Enterprises of Different Ownerships on Fiscal and Tax Service Environment

(IV) The rating of the resource industry is high, while ratings of other industries are low

Among the industries, the resource industry has the highest rating on the fiscal and tax service environment, with 4.64 points, followed by the construction, service, and traditional manufacturing industries with 4.58, 4.55 and 4.55 points respectively; and other industries and the high-tech industry have given lower ratings, i.e., 4.47 and 4.49 points respectively.

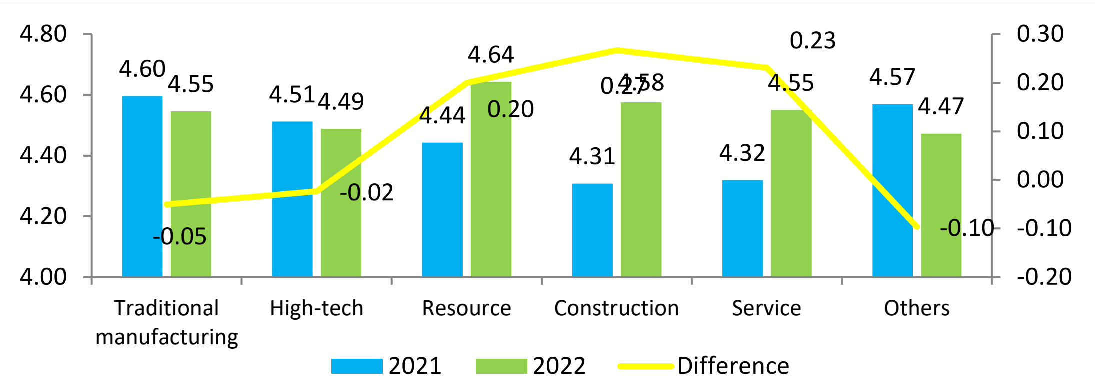


figure 2-10-4 Evaluation of Enterprises of Different Industries on Fiscal and Tax Service Environment

Compared with 2021, the construction and service industries have increased their ratings on the fiscal and tax service environment significantly by 0.27 and 0.23 points in 2022, followed by the resource industry with an increase of 0.20 points; and the ratings of other industries, traditional manufacturing industry and high-tech industry have declined by 0.10, 0.05 and 0.02 points respectively.

XI. Customs Service: High Evaluation on Inspection and Quarantine, Declined Evaluation on secondary Indexes

The customs service environment index is sub-divided into three secondary indexes, i.e., goods clearance, inspection and quarantine, and personnel entry and exit. In 2022, the surveyed enterprises have given high ratings on the customs service environment (4.48 points), which ranks fourth among the 12 primary indexes.

(I) High ratings on all secondary indexes, but lower than those in 2021

From the perspective of secondary indexes, the ratings on goods clearance and inspection and quarantine are high, at 4.48 and 4.49 points respectively, while the evaluation on personnel entry and exit is slightly lower, at 4.47 points. Compared with 2021, the scores of all sub-divided indexes have decreased in 2022, with those of personnel entry and exit and inspection and quarantine decreasing by 0.03 points, and that of goods clearance decreasing by 0.04 points.

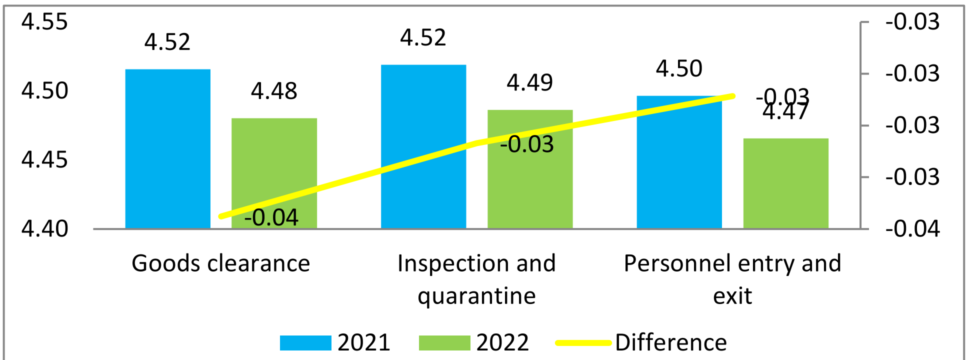


figure2-11-1 Evaluation on Sub-divided Indexes of Customs Service Environment

(II) Highest evaluation in central region, evaluation in western region significantly improved

Among the regions, the highest rating on customs service environment is received in the central region, at 4.55 points, and the ratings of the western and eastern regions are 4.48 and 4.43 points.

Compared with 2021, the rating of the western region on customs service environment has increased by 0.15 points, while those of the central and eastern regions have decreased by 0.07 and 0.23 points.

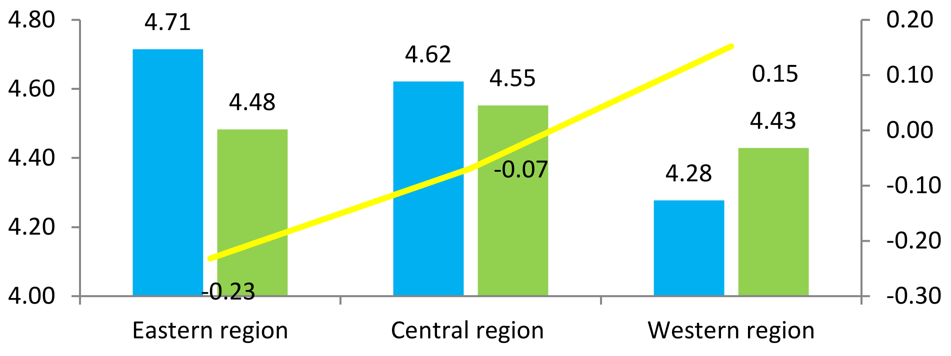


figure 2-11-2 Evaluation of Enterprises on Customs Service Environment in Different Regions

(III) Ratings of enterprises of other ownerships have increased the most, while those of some enterprises have decreased

Among different types of enterprises, Sino-foreign joint ventures and cooperative enterprises have given the highest ratings on customs service environment (4.60 points), followed by wholly foreign-owned enterprises (4.56 points) and private enterprises (4.47 points), while enterprises of other ownerships (4.45 points) and state-owned enterprises (4.45 points) have given the lowest ratings.

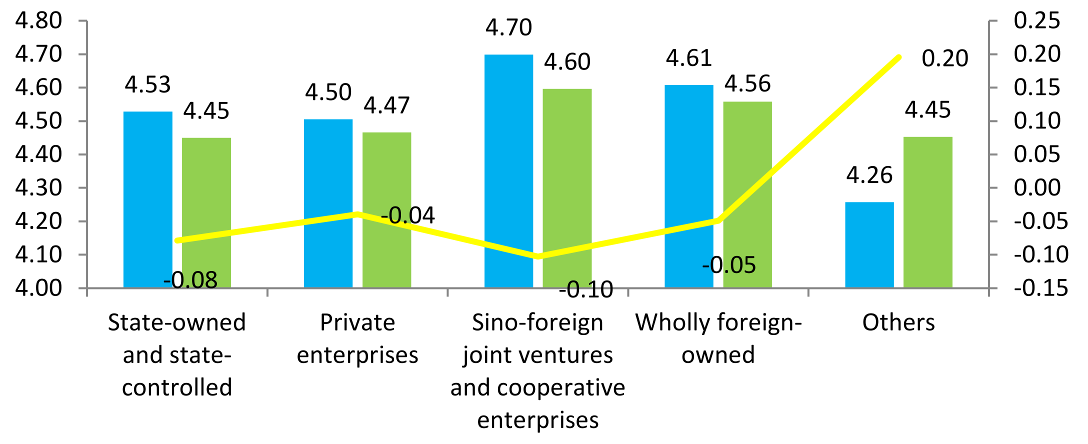


figure2-11-3 Evaluation of Enterprises of Different Ownerships on Customs Service Environment

Compared with 2021, enterprises of other ownerships in 2022 have increased their ratings on customs service environment the most (by 0.20 points), while the ratings of Sino-foreign joint ventures and cooperative enterprises, state-owned enterprises, wholly foreign-owned enterprises and private enterprises have declined by 0.10, 0.08, 0.05 and 0.04 points respectively.

(IV) The rating of the resource industry is high, while those of three industries have declined

Among the industries, the resource and construction industries have the highest ratings on the customs service environment, with 4.56 and 4.55 points, followed by the traditional manufacturing industry with 4.53 points; other industries have the lowest rating of 4.42 points; and the ratings of the service and high-tech industries are in the middle level, at 4.46 and 4.44 points respectively.

Compared with 2021, the construction industry has increased their ratings significantly by 0.33 points in 2022; the ratings of the resource and service industries have increased by 0.07 and 0.15 points, respectively; and the ratings of other industries, traditional manufacturing industry, and high-tech industry have declined by 0.10, 0.09 and 0.06 points respectively.

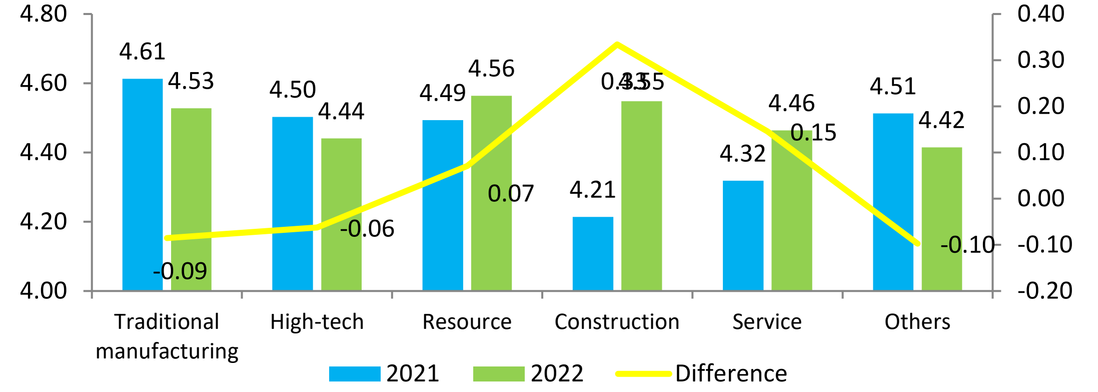


figure 2-11-4 Evaluation of Enterprises of Different Industries on Customs Service Environment

XII. Enterprise Establishment and Withdrawal: High Evaluation on Environmental Protection Procedure, Land Acquisition Improved the Most

The enterprise establishment and withdrawal environment index is sub-divided into three secondary indexes, i.e., land acquisition, environmental protection procedure, and bankruptcy procedure. In 2021, enterprise establishment and withdrawal environment is given a score of 4.43 points, ranking 8th among the 13 primary indexes.

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

From the perspective of secondary indexes, environmental protection procedure has the highest score of 4.44 points; bankruptcy procedure is lowest rated with 4.42 points; and the score of land acquisition is in the middle range, at 4.43 points.

Compared with 2021, the scores of all sub-divided indexes has improved in 2022, with that of land acquisition increasing by 0.09 points, and those of bankruptcy procedure and environmental protection procedure by 0.06 points.

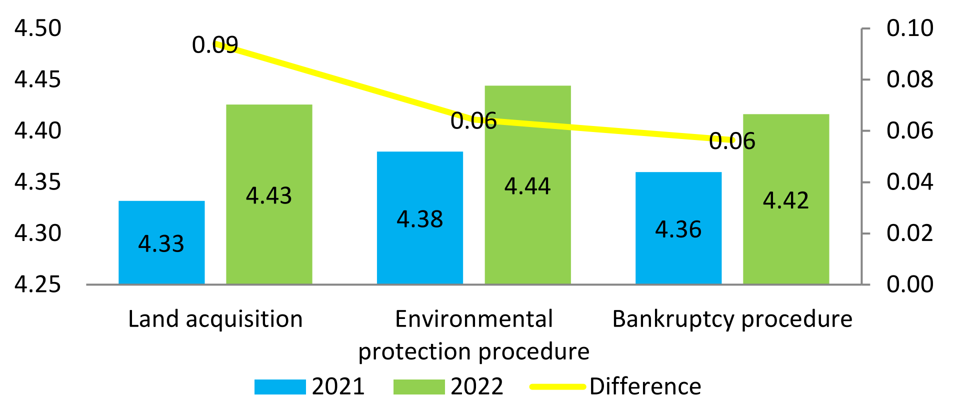


figure 2-12-1 Evaluation on Sub-divided Indexes of Enterprise Establishment and Withdrawal Environment

(II) Much increased rating in central and western regions, declined evaluation in eastern region

Among the regions, the highest rating on enterprise establishment and withdrawal environment is received in the central region, at 4.54 points, and the ratings of the western and eastern regions are 4.40 and 4.39 points.

Compared with 2021, the rating of the western region on enterprise establishment and withdrawal environment has increased by 0.24 points, that of the central region has increased by 0.07 points, and that of the eastern region has decreased by 0.16 points.

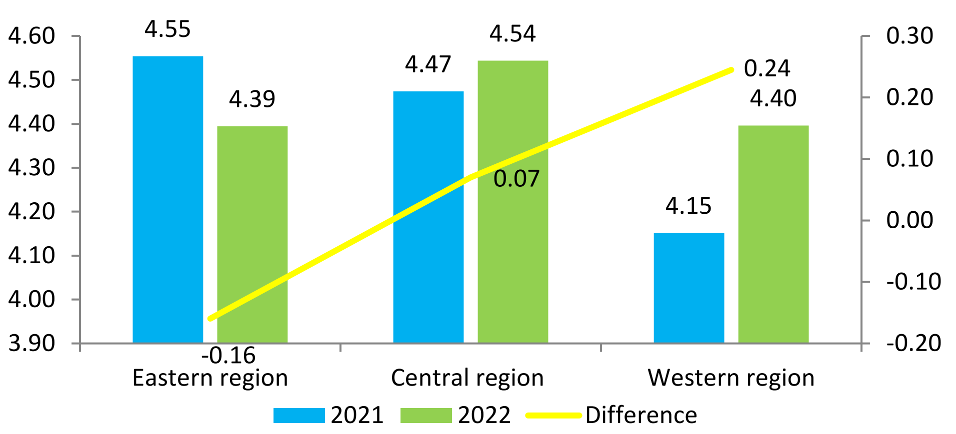


figure 2-12-2 Evaluation of Enterprises on Enterprise Establishment and Withdrawal Environment in Different Regions

(III) Enterprises of other ownerships have increased their ratings, while those of private enterprises are lower

Among different types of enterprises, Sino-foreign joint ventures and cooperative enterprises have given the highest ratings (4.55 points), followed by wholly foreign-owned enterprises (4.50 points) and enterprises of other ownerships (4.50 points); private enterprises have given the lowest ratings (4.41 points), while those of state-owned enterprises are slightly higher, at 4.42 points.

Compared with 2021, enterprises of other ownerships in 2022 have increased their ratings on enterprise establishment and withdrawal environment the most by 0.31 points, followed by private share enterprises and wholly foreign-owned enterprises (whose ratings have increased by 0.07 and 0.03 points). The ratings of Sino-foreign joint ventures and cooperative enterprises and state-owned enterprises are the same as those in 2021.

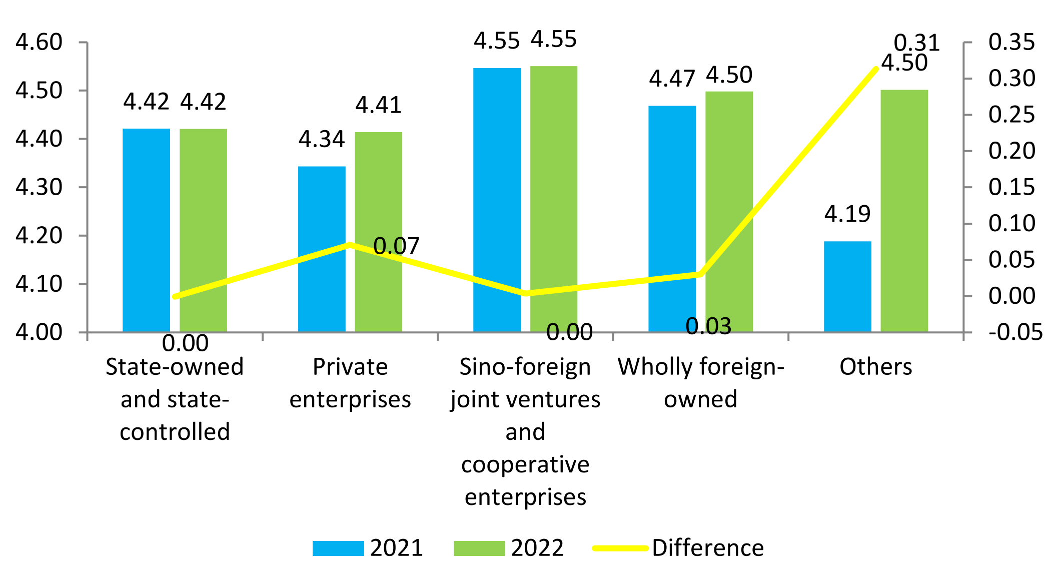


figure 2-12-3Evaluation of Enterprises of Different Ownerships on Enterprise Establishment and Withdrawal Environment

(IV) The rating of the construction industry is high, while ratings of other industries are low

Among the industries, the construction industry has the highest rating on the enterprise establishment and withdrawal environment, with 4.60 points, followed by the resource, service, traditional manufacturing and high-tech industries with 4.58, 4.44, 4.44 and 4.41 points respectively, while other industries have a lower rating of 4.38 points.

Compared with 2021, the construction industry has increased their ratings on the enterprise establishment and withdrawal environment significantly by 0.36 in 2022, followed by the service and resource industries (whose rating has increased by 0.20 and 0.23 points); and the ratings of the high-tech and traditional manufacturing industries have both slightly increased by 0.04 points. The ratings of other industries on the enterprise establishment and withdrawal environment remain the same as those in 2021.

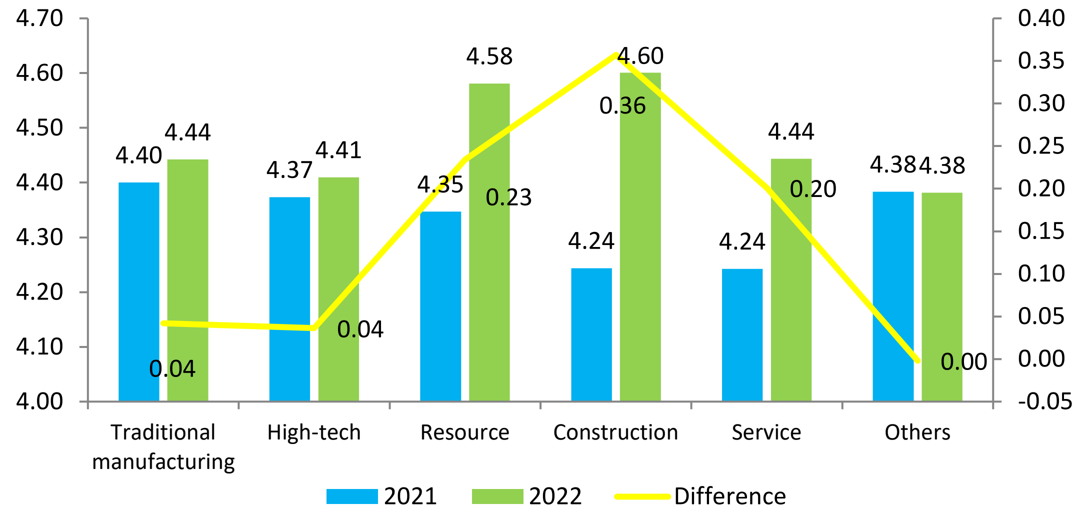


figure 2-12-4 Evaluation of Enterprises of Different Industries on Enterprise Establishment and Withdrawal Environment

Chapter III Operation and Investment Status of Enterprises

Nearly 90% of the surveyed enterprises were negatively affected by the epidemic to varying degrees in 2022, 92.1% of which are in the eastern region, and 76.2% of the surveyed enterprises achieved average revenue and above, seeing a decrease of 13.2% year-on-year. The enterprises invest with the primary aim of leveraging local resources and expanding markets. The surveyed enterprises hope that the government may further optimize the policy and government administration environment, introduce upstream and downstream supporting enterprises, and further provide financial subsidies and tax relief for the affected enterprises.

I. Nearly 90% Of Enterprises Were Affected by Covid-19 To Varying Degrees

(I) Nearly 90% of the surveyed enterprises were negatively affected by the epidemic

Nearly 90% of the surveyed enterprises were negatively affected by the COVID-19 epidemic to varying degrees[①], among which those "greatly affected" account for 42.7%, which is the highest proportion, while those "less affected" and "seriously affected" account for 31.4% and 14.7%, respectively. In addition, 6.0% of the enterprises reflected that they had been positively affected, while 5.3% stated that they were not affected.

[①]Note: Those had a 50% or more decline in sales revenue in the first half of 2022 are considered "seriously affected", those having a 20%-50% decline are considered "greatly affected", "less affected" enterprises had a 0-20% decline, and "positively affected" enterprises had an increase rather than a decrease in revenue.

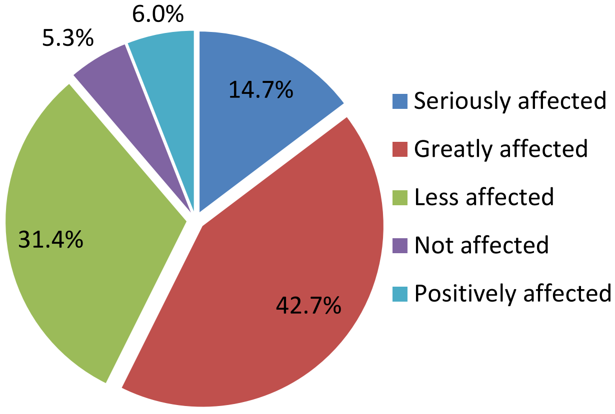


figure 3-1-1 Evaluation of the Impact of COVID-19

Among different regions, the percentage of enterprises affected by the epidemic in the eastern, central and western regions all exceeds 80%, with the highest percentage in the eastern region, at 92.1%. In terms of the degree of impact, the highest proportion (61.5%) of "seriously affected" and "greatly affected" enterprises is seen in the western region, and the highest proportion (13.2%) of "positively affected" and "not affected" enterprises appears in the central region.

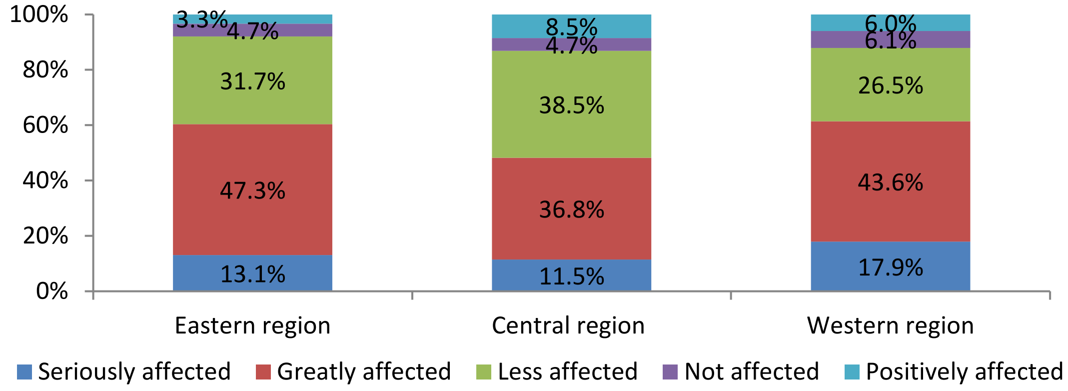


figure3-1-2 Evaluation of the Impact of COVID-19 in Different Regions

Among different types of enterprises, enterprises of other ownerships account for a higher percentage of those negatively affected by the epidemic (89.2%), while wholly foreign-owned enterprises account for a higher percentage of those not affected or positively affected (18.3%).

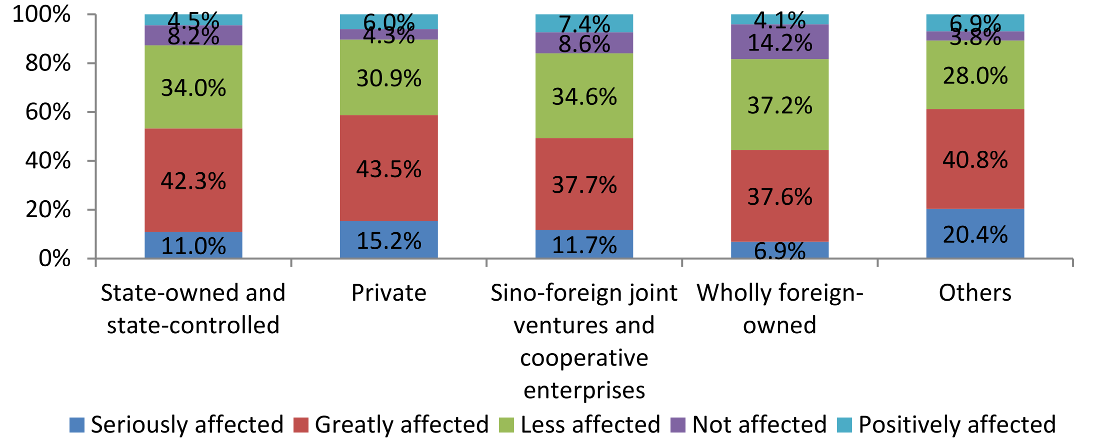


figure3-1-3 Evaluation of the Impact of COVID-19 on Enterprises of Different Ownerships

Among different industries, enterprises in the service industry (88.9%) and other industries (90.3%) were negatively affected by the epidemic, while a higher percentage (14.3%) of enterprises in the resource industry were not affected or was positively affected.

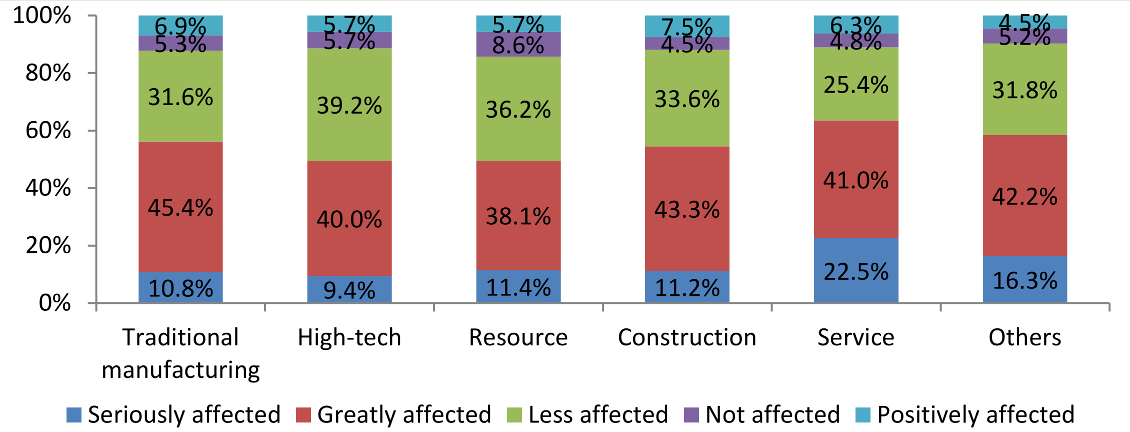


figure 3-1-4 Evaluation of the Impact of COVID-19 Epidemic on Enterprises in Different Industries

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

Of all the surveyed enterprises, 47.0% reflected that their supply chain was most affected by the epidemic; 40.4% and 36.8% stated that production and operation and export were significantly affected; 34.9%, 31.7% and 27.3% reported that their capital chain, domestic sales and resumption of work were affected; and 6.1% gave feedback that their after-sales service was affected.

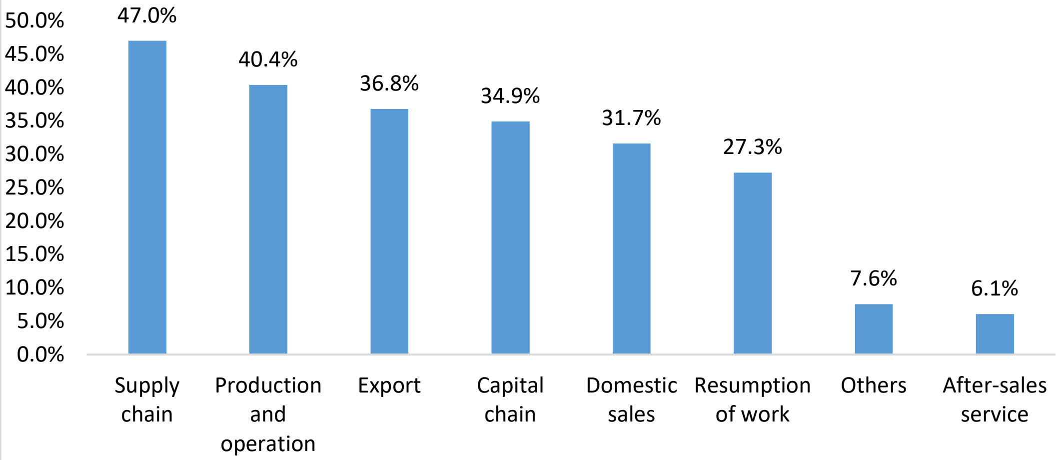


figure 3-1-5 Impact of the COVID-l9 on Enterp rises Production and Operation

From the industry perspective, the enterprises in the resource industry (48.1%), traditional manufacturing industry (55.8%), and high-tech industry (63.7%) reflected that their supply chain was greatly affected by the epidemic; and those in other industries (41.0%), service industry (49.2%), and construction industry (50.8%) reported that their production and operation were greatly affected.

Table 3-1-1 Major Manifestations of Different Industries Affected by the Epidemic

Traditional manufacturing	High-tech	Resource	Construction	Service	Others
Supply chain 55.8%	Supply chain 63.7%	Supply chain 48.1%	Production and operation 50.8%	Production and operation 49.2%	Production and operation 41.0%
Export 48.4%	Export 46.6%	Production and operation 42.3%	Capital chain 43.8%	Capital chain 37.7%	Supply chain 40.4%
Domestic sales 35.8%	Domestic sales 41.1%	Capital chain 37.5%	Resumption of work 43.8%	Supply chain 35.4%	Export 36.7%
Production and operation 35.5%	Capital chain 34.7%	Resumption of work 36.5%	Supply chain 30.8%	Resumption of work 27.5%	Capital chain 33.5%
Capital chain 33.3%	Production and operation 33.6%	Domestic sales 28.8%	Domestic sales 20.0%	Domestic sales 26.0%	Domestic sales 28.7%
Resumption of work 28.1%	Resumption of work 27.7%	Export 19.2%	Others 16.2%	Export 19.6%	Resumption of work 23.1%

After-sales service 4.3%	After-sales service 7.5%	Others 8.7%	Export 8.5%	Others 11.8%	Others 11.7%
Others 1.4%	Others 4.6%	After-sales service 5.8%	After-sales service 4.6%	After-sales service 9.2%	After-sales service 5.2%

(III) The optimism of the surveyed enterprises towards the development prospects in the post-epidemic period has declined

According to the survey, more than 50% (56.3%) of the enterprises hold a "neutral" attitude towards the development prospects in the post-epidemic period, 36.6% are "optimistic" and only 7.1% are "pessimistic" attitude.

Compared with 2021, the proportion of enterprises holding an "optimistic" attitude has decreased by 4.7%, and that of "pessimistic" enterprises has increased by 2.1%.

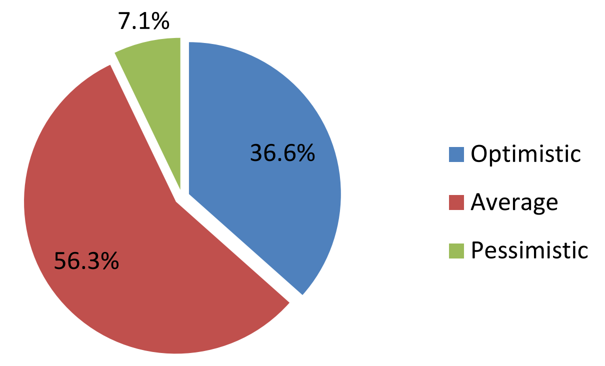


figure 3-1-6 Expectation of Development Prospects of Enterprises in the Post-epidemic Period

The proportions of enterprises of all types holding a "neutral" attitude towards the development prospects in the post-epidemic period are close, with private enterprises accounting for the highest proportion (57.5%); state-owned enterprises account for the largest proportion of those "optimistic" ones (50.5%); and Sino-foreign joint ventures and cooperative enterprises take the largest share (8.0%) in the "pessimistic" group.

Compared with 2021, the proportions of Sino-foreign joint ventures and cooperative enterprises, wholly foreign-owned enterprises, enterprises of other ownerships, private enterprises and state-owned enterprises with a "pessimistic" attitude have increased by 5.2%, 3.7%, 2.2%, 1.7% and 1.4% respectively.

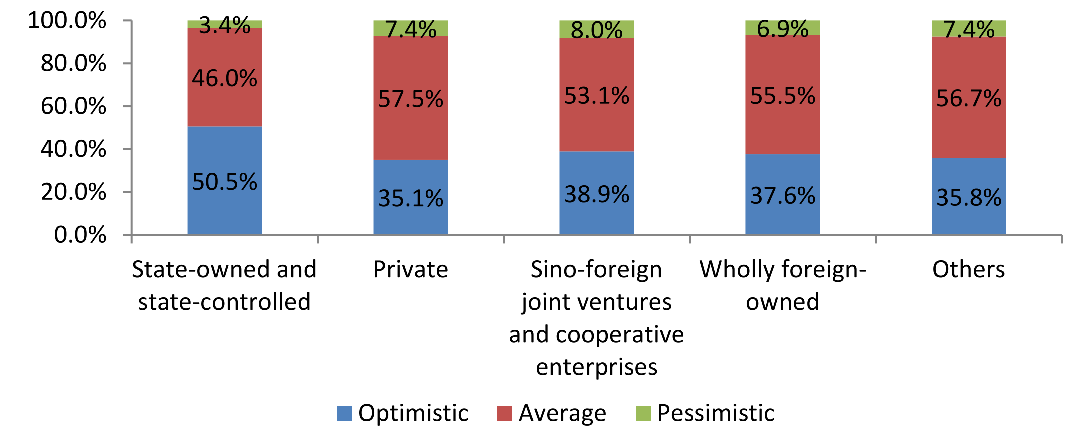


figure3-1-7 Expectation of Development Prospects of Enterprises of Different Ownerships in the Post-epidemic Period

There are obvious differences in the "optimistic" enterprises in different industries towards the development prospects in the post-epidemic period, among which enterprises in high-tech industries account for the highest proportion (43.1%); the proportions of enterprises with a "neutral" attitude in different industries are close to or more than half, among which enterprises other ownerships account for the highest proportion (59.7%); and except for the service industry, the proportions of with "pessimistic" enterprises in all industries are less than 10%.

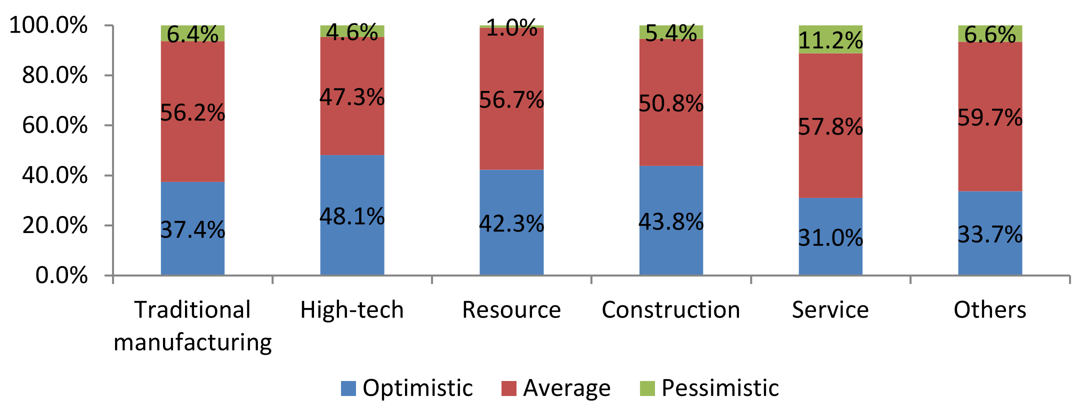


figure3-1-8 Expectation of Development Prospects of Enterprises in Different Industries in the Post-epidemic Period

Compared with 2021, the proportion of enterprises in the construction industry with a "pessimistic" attitude towards the post-epidemic period has decreased by 3.9 %, while the proportions of such enterprises in the resource, service, traditional manufacturing, high-tech and other industries have increased by 5.8%, 3.4%, 2.4%, 1.4% and 1.4% respectively.

(IV) Nearly 70% of the surveyed enterprises expect the government to provide subsidies for the epidemic

In order to minimize the impact of the epidemic, over 60% of enterprises expect the government to provide epidemic subsidies (66.5%) and increase tax relief (63.8%); 44.0% expect financial support; over 30% expect the government to provide support in logistics (30.1%) and build an online matchmaking platform between enterprises (19.7%); and about 10% need regular guidance on epidemic prevention and control (11.9%) and epidemic prevention supplies (8.3%).

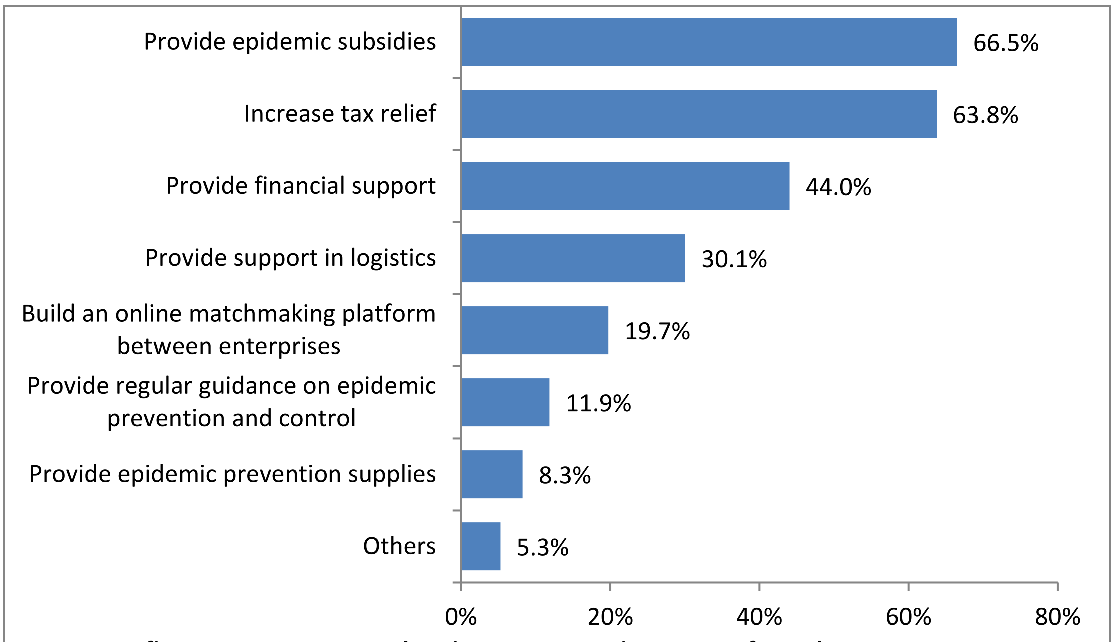


figure3-1-9 Support and Assistance Enterprises Expect from the Government to Fight Against COVID-19

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

Affected by the epidemic, more than half of the surveyed enterprises (50.7%) have taken or may take measures to reduce unnecessary expenses, 49.2% have adjusted their business strategies, and 38.1% have reduced their production capacity. In addition, 12.8%, 14.8%, 10.7% and 9.4% of the enterprises have taken other measures, laid off employees, cut salaries and suspended operation respectively.

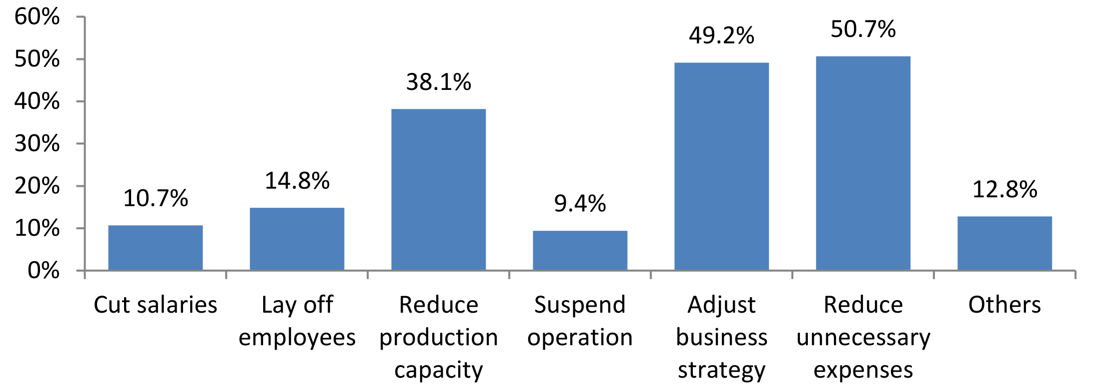


figure3-1-10 Measures Enterprises Have Taken or May Take to Respond to the COVID-19 Epidemic

II. The Proportion of Enterprises with Revenue Growth Has Decreased Year on Year

In 2022, 76.2% of the surveyed enterprises had average revenue or above, down 13.2 % from 2021, and 35.7% maintained their revenue at the good level or above, down 3.8 % from 2021.[①]

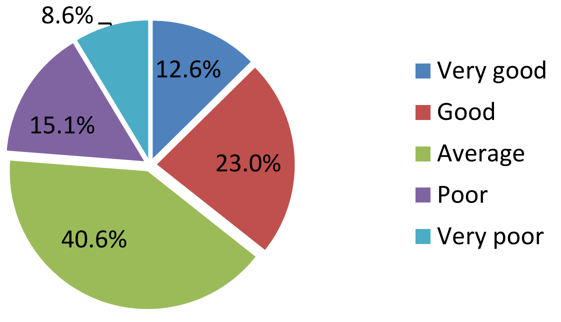


figure3-2-1 Current Status of Return on Investment (ROI) of Enterprises

(I) Nearly 50% of the surveyed enterprises in the central region have maintained their ROI at the good level or above, while less than 30% have achieved such result in the eastern region

[①]Note: A 10% growth or more in revenue is considered "very good", a 5-10% growth "good", a 0-5% growth "average", a decline less than 10% "poor", and a decline above 10% "very poor".

Among the regions, the proportion of enterprises with very good and good ROI in the central region (42.0%) exceeds the national average (35.7%); such enterprises in the eastern region account for 29.2% only; and in the western region, the proportion of such enterprises is on par with the national average. The proportions of enterprises with average ROI or above in the eastern, central, and western regions all exceed 70%, being 74.5%, 85.2% and 74.6% respectively.

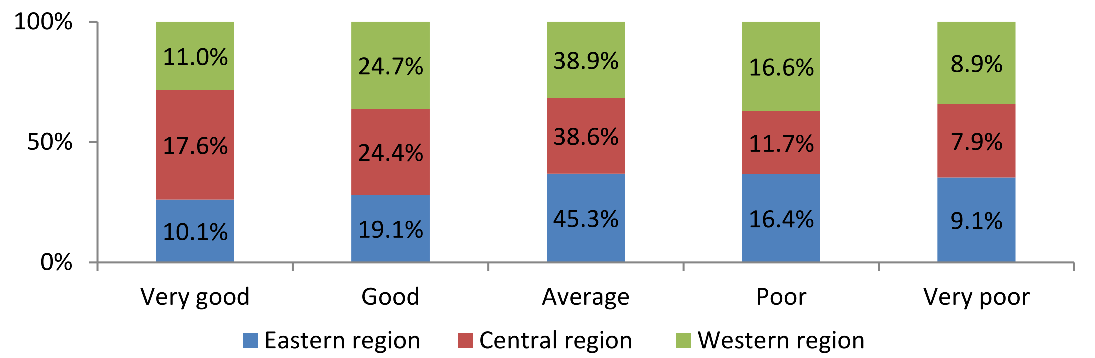


figure3-2-2 ROI of Enterprises by Region

(II) Enterprises with good ROI or above account for more than 50% in the resource industry

Among different industries, the resources industry contributes 55.4% of the enterprises with good ROI or above, followed by the high-tech industry (46.8%), while the service industry ranks last (29.5%). In the resource industry, the proportions of enterprises with very good and good ROI are the highest, being 27.2% and 28.2% respectively, and enterprises with growth in ROI (average and above) account for the largest proportion, 83.5%. More than 40% of enterprises (44.2%) in the construction industry have made average ROI, accounting for the highest proportion. The service industry contributes the highest proportion (30.4%) of enterprises with poor and very poor ROI.

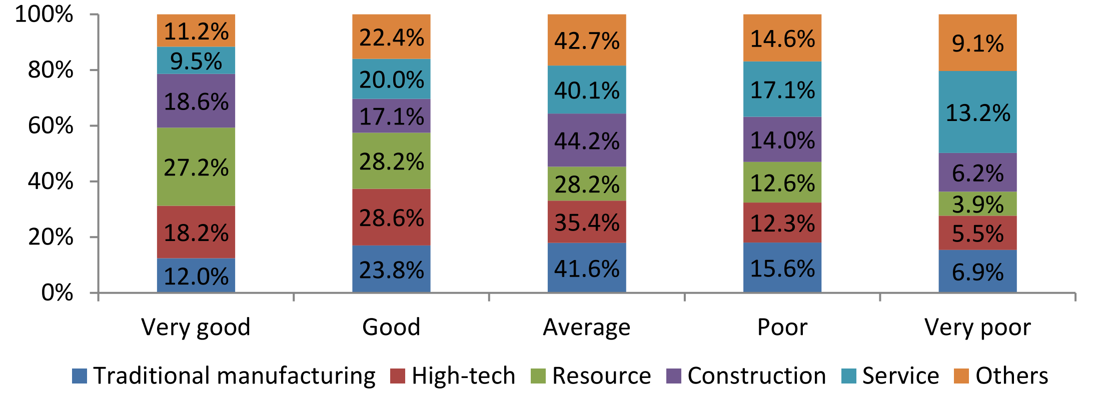


figure3-2-3 ROI of Enterprises by Industry

(III) The proportion of enterprises with positive ROI growth has decreased compared with 2021

The percentage of enterprises with positive ROI growth (average and above) is 76.2% in 2022, down 6.8 % from 83.0% in 2021. The proportion of enterprises with good ROI has declined by 5.6%, and that of enterprises with average ROI by 3%. The proportions of enterprises with very good, poor and very poor ROI have increased by 1.9%, 2.2% and 4.5% respectively.

Among different regions, 80.6% of enterprises in the central region have made positive ROI growth in 2022, 4.5% lower than in 2021; and such proportions in the western and eastern regions are 74.6% and 74.5%, down 0.6% and 16.1% from 2021.

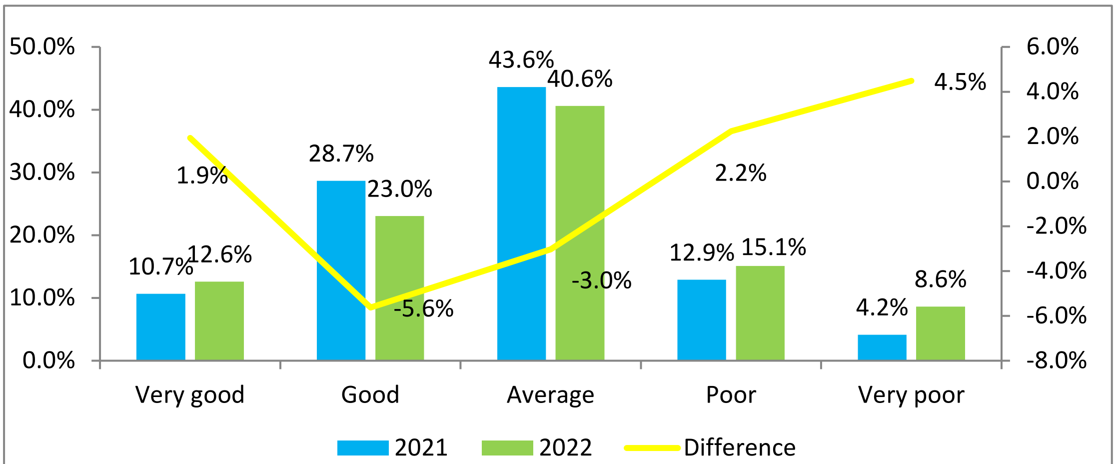


figure3-2-4 Current Status of ROI of Enterprises

Among different industries, 44.4% of enterprises in the traditional manufacturing industry have positive ROI growth in 2022, 8.4% lower than in 2021; 82.2% of enterprises in the high-tech industry have positive ROI growth, 4% lower than in 2021; 83.6% of enterprises in the resource industry have positive ROI growth, up 4.1% from 2021; 79.9% of enterprises in the construction industry have made positive ROI growth, 1.5% lower than in 2021; 69.6% of enterprises in the service industry have positive ROI growth, down 5.8% from 2021; and 76.3% of enterprises in other industries have positive ROI growth, down 6.3% from 2021.

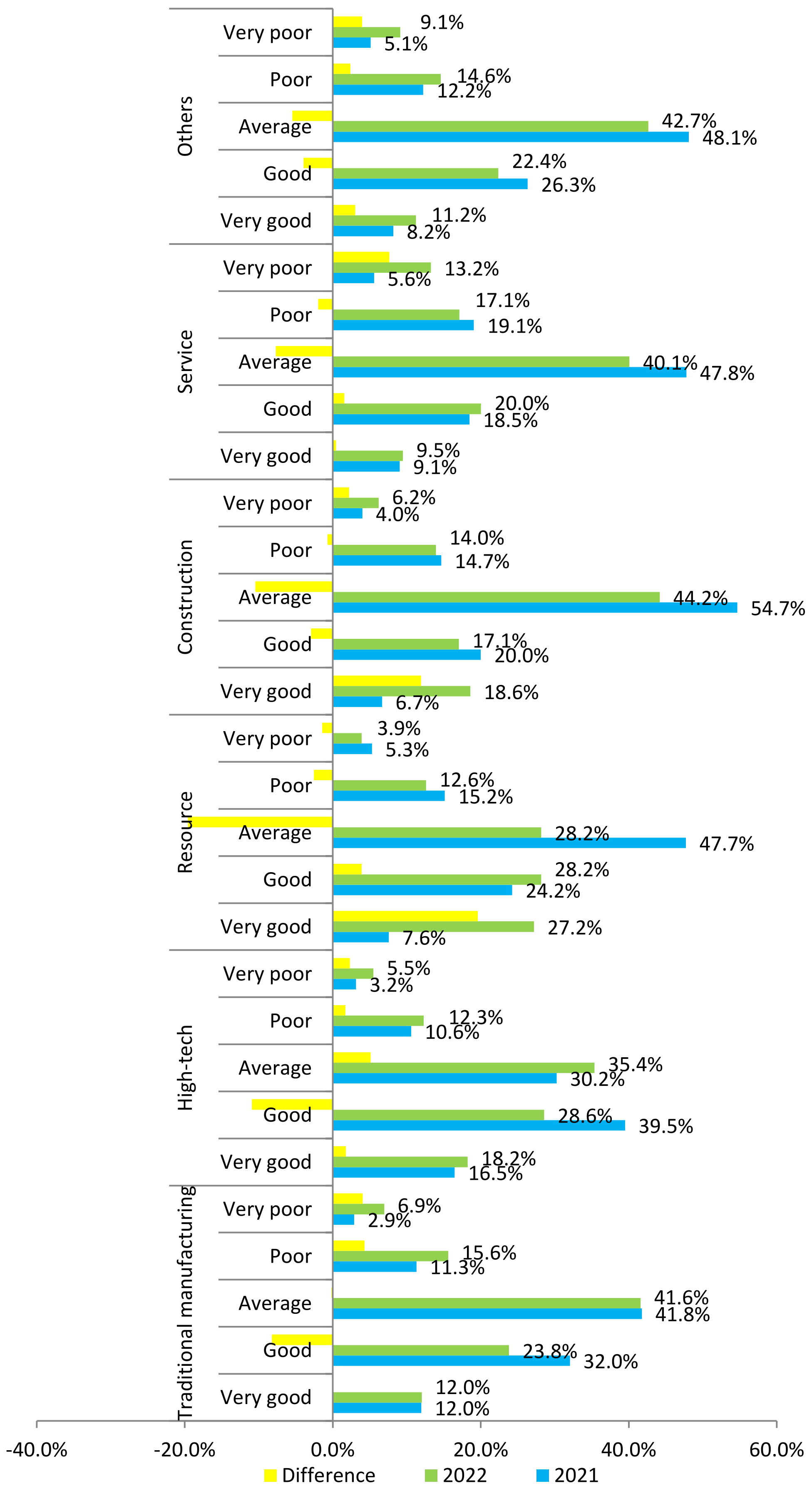


figure3-2-5 Comparison of ROI of Enterprises by Industry

III. Rising Costs and Fierce Market Competition Have Become Prominent Problems

Enterprises reflected that in their production and operation, rising costs and fierce market competition are the most obvious problems, accounting for 80.7% and 66.3% respectively. In addition, insufficient financial support (24.6%), excessive tax burden (14.9%), and unstable policies (12.8%) are also prominent problems.

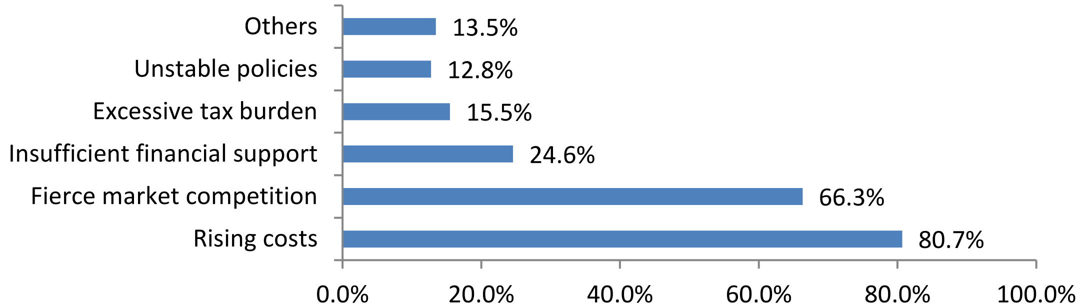


figure 3-3-1 Problems Encountered by Enterprises in Their Production and Operation

More than 70% of enterprises in all industries consider rising costs as the most serious problem encountered in production and operation, followed by fierce market competition and insufficient financial support. There are 18.4% and 18.3% of enterprises in the traditional manufacturing and high-tech industries reflecting that the tax burden is excessive; 14.1% and 20.3% of enterprises in the resource and construction industries reflected that the policy is unstable; and 16.0% and 17.9% of enterprises in service industry and other industries reported other problems.

Figure 3-3-1 Major Problems Encountered by Enterprises in Their Production and Operation in Different Industries

Traditional manufacturing	High-tech	Resource	Construction	Service	Others
Rising costs 87.2%	Rising costs 85.3%	Rising costs 76.9%	Rising costs 77.2%	Rising costs 71.9%	Rising costs 78.5%
Fierce market competition 68.2%	Fierce market competition 67.3%	Fierce market competition 57.7%	Fierce market competition 68.4%	Fierce market competition 67.0%	Fierce market competition 63.8%
Insufficient financial support 20.4%	Insufficient financial support 28.5%	Insufficient financial support 29.5%	Insufficient financial support 34.2%	Insufficient financial support 24.9%	Insufficient financial support 26.2%

Excessive tax burden 18.4%	Excessive tax burden 18.3%	Unstable policies 14.1%	Unstable policies 20.3%	Others 16.0%	Others 17.9%
Unstable policies 10.4%	Unstable policies 11.3%	Excessive tax burden 10.3%	Excessive tax burden 16.5%	Unstable policies 15.9%	Excessive tax burden 13.6%
Others 9.6%	Others 9.9%	Others 9.0%	Others 12.7%	Excessive tax burden 12.5%	Unstable policies 13.0%

IV. Utilization of Local Resources and Market Expansion Are Major Purposes for Investment

(I) Nearly 50% of the surveyed enterprises regard the utilization of local resource as the principal purpose for investment

Among the surveyed enterprises, 44.1% regard the utilization of local resources as the principal purpose for investment, followed by market expansion (41.8%) and establishment of production bases (38.8%). Over 30% of the enterprises consider reduction of production costs and enjoyment of favorable policies (34.4% and 30.4%) as their principal purpose for investment. Provision of industrial support and establishment of strategic cooperation are also among important purposes for enterprises to plan their investment.

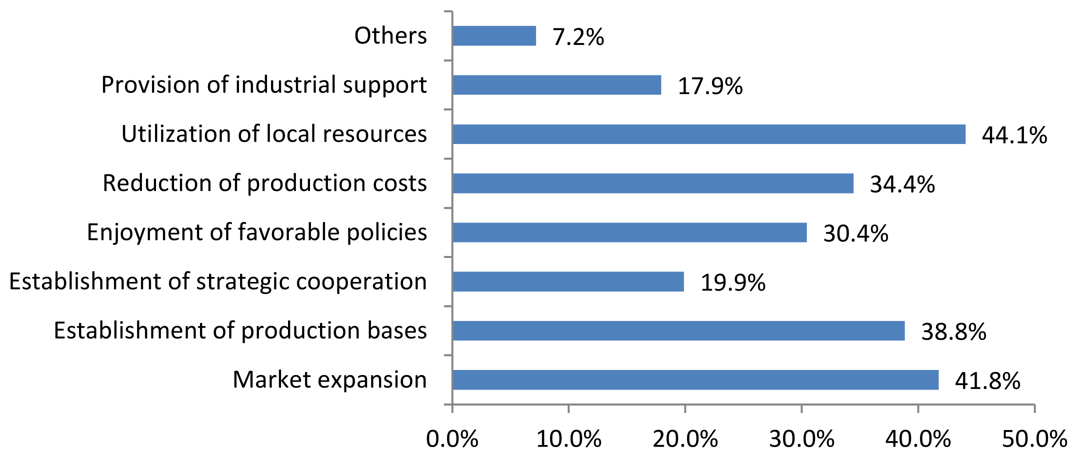
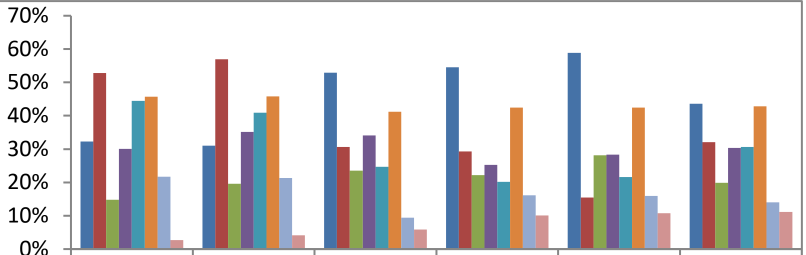


figure 3-4-1 Main Purposes of Local Investment of Enterprises

Among different industries, 52.9% and 56.9% of the enterprises in the traditional manufacturing and high-tech industries chose establishment of production bases as their principal purpose of investment, while 52.9%, 54.5%, 58.9% and 43.6% of the enterprises in the resource industry, construction industry, service industry and other industries made their investment mainly for expanding markets.



	Traditional manufacturing	High-tech	Resource	Construction	Service	Others
Market expansion	32.3%	31.0%	52.9%	54.5%	58.9%	43.6%
Establishment of production bases	52.9%	56.9%	30.6%	29.3%	15.5%	32.1%
Establishment of strategic cooperation	14.8%	19.6%	23.5%	22.2%	28.2%	19.9%
Enjoyment of favorable policies	30.1%	35.1%	34.1%	25.3%	28.3%	30.3%
Reduction of production costs	44.5%	40.9%	24.7%	20.2%	21.6%	30.7%
Utilization of local resources	45.7%	45.8%	41.2%	42.4%	42.5%	42.9%
Provision of industrial support	21.7%	21.3%	9.4%	16.2%	15.9%	14.1%
Others	2.7%	4.1%	5.9%	10.1%	10.7%	11.1%

Figure 3-4-2 Main Purposes of Local Investment of Enterprises in Different Industries

(II) The surveyed enterprises mainly relied on their own investigation and local governments' investment promotion efforts to make investment decisions

More than half (56.1%) of the enterprises made their decisions on local investment through their own investigation, and nearly 40% (36.2%) of the enterprises were attracted by local governments' promotional policies; 27.0% and 24.6% of the enterprises invested for implementing new projects based on existing projects and for competing with peers or related industries; and third-party recommendation and other factors are minor drivers accounting for 13.5% and 10.0%, respectively.

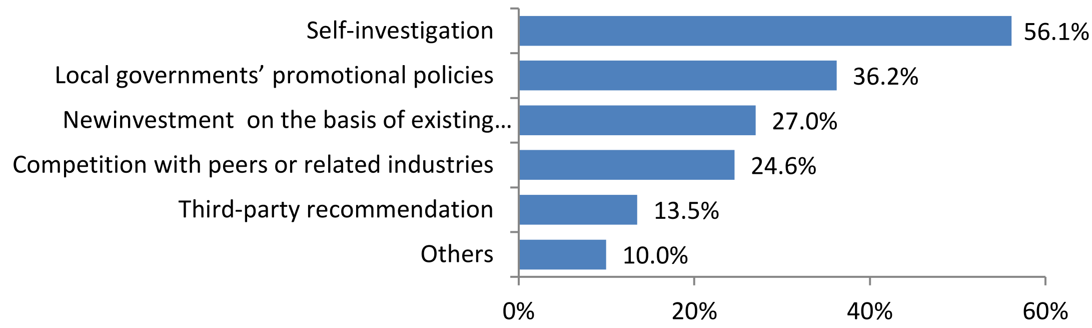


Figure 3-4-3 Factors Leading to Local Investment Decisions of Enterprises

V. Enterprises Expect Governments to Optimize Policy and Government Administration Index

(I) The policy and government administration environment is the major concern of the surveyed enterprises

In this survey, most enterprises hope that local governments can continue to improve the policy and government administration environment (49.3%), followed by infrastructure environment (41.6%), human resources environment (22.5%) and financial service environment (23.9%).

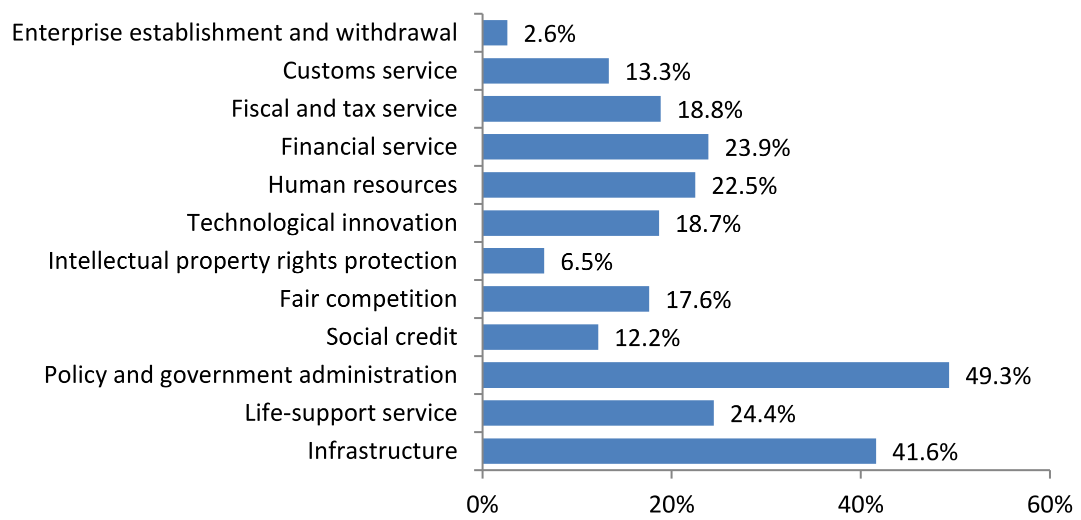


figure3-5-1 Aspects of Business Environment to be Improved in Enterprises' View

(II) The surveyed enterprises have high requirements for the construction of local industrial chains

The survey results show that most enterprises hope that, in investment attraction, local governments prioritize upstream and downstream supporting enterprises (70.8%), followed by trading and logistics enterprises (51.4%), while financial service (such as leasing and guarantee) providers and legal consulting service providers are proposed by 17.2% and 15.5% of the enterprises.

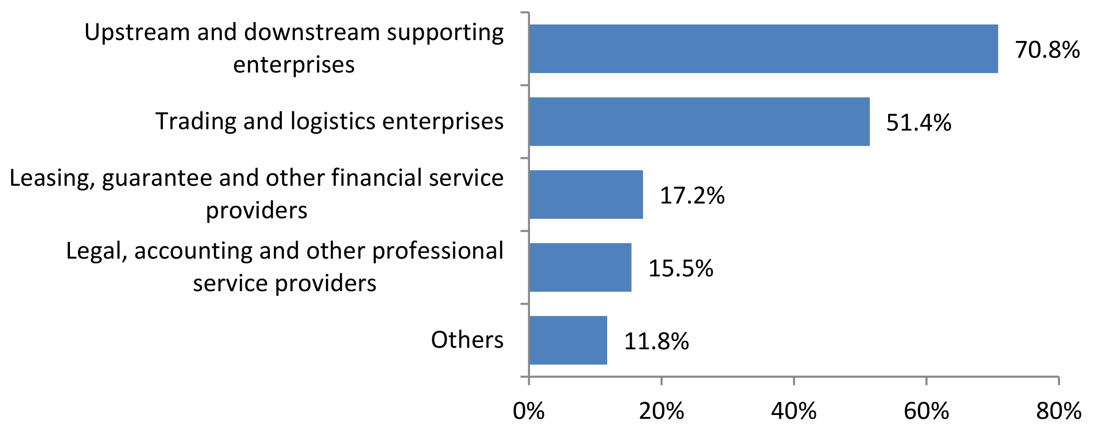


figure3-5-2 Preferred Types of Enterprises to be Introduced

(III) The surveyed enterprises hope that the CCPIT will focus on improving the information platform

A better information platform stands out as the most expected service (59.1%) from the CCPIT, followed by investment project matchmaking (49.0%). In addition, 37.6%, 32.4%, 28.9% and 18.5% of the enterprises expect business training, domestic and international inspections, exhibitions and forums and commercial legal services from the CCPIT.

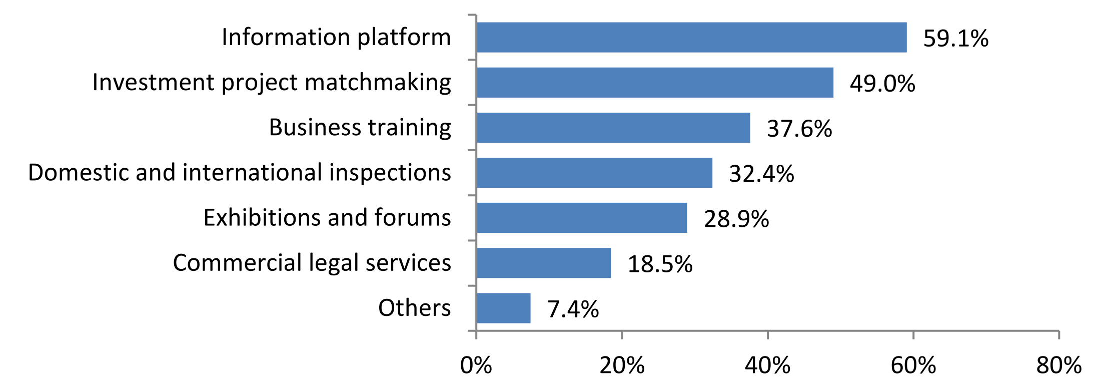


figure3-5-3 Most Expected Services from the CCPIT

Chapter IV Achievements in Business Environment Construction

I. Rolling Out Before Promoting Innovative Pilot Programs of Business Environment

(I) Rolling out pilot programs of business environment innovation

The State Council issued the *Opinions of the State Council on Conducting Innovative Pilot Programs of Business Environment* (hereinafter referred to as "*Opinions*") in November 2021 to encourage local governments, where conditions allow, to further carry out pilot programs according to the highest standards, accelerate the construction of a business environment that is in line with internationally accepted rules, and continuously optimize the market-oriented, rule-of-law, and internationalized business environment.[①] The *Opinions* clarified the key tasks in ten aspects of the business environment innovation pilot programs: 1. To further remove unreasonable restrictions such as regional segmentation and local protection; 2. To improve the market access and exit mechanism to be more open, transparent, standardized and efficient; 3. To continue to improve the convenience of investment and construction; 4. To provide better support for the innovation and development of market entities; 5. To continuously improve the convenience of cross-border trading; 6. To optimize the management of foreign investment and international talent services; 7. To maintain a fair competition order; 8. To further strengthen and innovate supervision measures; 9. To protect the property rights and legitimate rights and interests of various market entities

[①] Website of Chinese government http://www.gov.cn/

in accordance with the law; and 10. To optimize regular enterprise-related services. The primary objectives proposed in the *Opinions* are: After three to five years of rolling out the programs, the international competitiveness of the business environment of the pilot cities leaps to the forefront of the world; the governance efficiency of local governments is comprehensively improved; the ability to gather and allocate various resources on a global scale is significantly enhanced; the activity of market entities and the quality of development are significantly improved; a first-class market-oriented, rule-of-law, and internationalized business environment is built; and a series of institutional innovations that can be replicated and promoted are formed, setting an important example for the construction of the national business environment.

Beijing, Shanghai, Chongqing, Hangzhou, Guangzhou, and Shenzhen were selected as pilot cities by comprehensively considering the size of the economy, the number of market entities, and the basic conditions for reform. The implementation and completion of pilot programs in each city are as follows:

In 2022, Beijing issued the *Implementation Plan for Fostering and Stimulating the Vitality of Market Entities and Continuously Optimizing the Business Environment* and *Implementation Plan for Rolling out Pilot Programs on Business Environment Innovation in Beijing.* This is the fifth consecutive batch of reform initiatives to optimize the business environment in Beijing, known as the "1+1" V5.0 Reform, that is, "innovation + vitality = Beijing business environment reform, V5.0". As of August 17, Beijing has basically completed the tasks as a 2022 national business environment innovation pilot city, and 83% of the 299 tasks of the business environment reform V5.0 have been completed.[①]

[①] Beijing Municipal Bureau of Economy and Information Technology http://creditbj.jxj.beijing.gov.cn

In December 2021, **Shanghai** issued the *Implementation Plan for Business Environment Innovation Pilot Programs*, with the aim of promoting the competitiveness of Shanghai's business environment to the forefront of the world within 3-5 years. In 2022, various districts in Shanghai, based on the innovation pilot programs, has formulated a series of policies. For example, Yangpu District has upgraded the Action Plan to Optimize Business Environment V5.0 to relieve difficulties for market entities, formulated the *Action Plan to Continuously Promote the Reform and Innovation of Yangpu Business Environment According to the Highest Standard*, and launched 150 reform and innovation tasks and 10 characteristic service brands.[①]

Chongqing has successively issued policy documents such as the *Implementation Plan for Business Environment Innovation Pilot Programs* since January 2022 to continue to deepen the pilot work of business environment innovation and the construction of a business environment in the Chengdu-Chongqing economic circle, further alleviate the difficulties of market entities, stimulate the vitality of the market and the development of endogenous power, and improve the convenience, satisfaction and sense of gain of the masses in doing business and starting businesses.[②]

Hangzhou issued the *Implementation Plan for National Business Environment Innovation Pilot Programs* in 2022, forming a reform system of "1 general program + 153 special programs", and distributing benefits to enterprises and residents through a series of practical measures.[③]Based on the implementation of 101 national reform measures, 52 new special measures have been added to build the best domestic and world-class

① Shanghai Municipal Development & Reform Commission https://fgw.sh.gov.cn

② Chongqing Municipal People’s Government http://www.cq.gov.cn

③ Hangzhou Municipal Government http://www.hangzhou.gov.cn business environment and create a number of "hard core" achievements in the fields of electronic licenses, "Internet + supervision", comprehensive law enforcement, and government services.

Guangzhou has implemented the *Implementation Plan for Building a National Business Environment Innovation Pilot City* in 2022, and launched the business environment reform V5.0 to make greater efforts to facilitate enterprises and people, focusing on vitality release, system innovation and system supply. A more efficient service system is being built to serve all market entities for their entire life cycle, and to help them solve difficulties on the "one policy for one enterprise, one policy for one problem" basis.

In 2022, **Shenzhen** issued the *Implementation Plan for Building a Business Environment Innovation Pilot City*, officially launching the business environment reform V5.0. The tasks in 12 fields were proposed in four aspects: creating a competitive and orderly market environment, creating a fair and transparent rule-of-law environment, building an open environment that is in line with international standards, and creating an efficient and convenient government administration environment; and the first 200 specific reform measures to be implemented in this year were clarified.[①]In addition, Shenzhen has also set up three main directions of efforts: strengthening new supply of elements, complying with new international rules, and cultivating high-quality new market entities, and proposed 99 "optional" reform tasks to carry forward Shenzhen's pioneering spirit of "dare to be the first".[②]

(II) Replicating and promoting business environment innovation and reform measures

① Development and Reform Commission of Shenzhen Municipality http://fgw.sz.gov.cn

② Commerce Bureau of Shenzhen Municipality http://commerce.sz.gov.cn

In October, the General Office of the State Council issued the *Circular on Replicating and Promoting Pilot Business Environment Innovation and Reform Measures*, deciding to replicate and promote a number of pilot business environment innovation and reform measures across the country to further expand the effect of the reform and promote the overall improvement of business environment nationwide. The reform measures for replication and promotion involve nine tasks: 1. To further remove unreasonable restrictions such as regional segmentation and local protection (9 measures); 2. To improve the market access and exit mechanism to be more open, transparent, standardized and efficient (4 measures); 3. To continue to improve the convenience of investment and construction (7 measures); 4. To provide better support for the innovation and development of market entities (2 measures); 5. To continuously improve the convenience of cross-border trading (5 measures); 6. To maintain a fair competition order (3 measures); 7. To further strengthen and innovate supervision measures (5 measures); 8. To protect the property rights and legitimate rights and interests of various market entities in accordance with the law (2 measures); and 9. To optimize regular enterprise-related services (13 measures).

II. Continuously Improved Law-Based Business Environment

(I) A law-based business environment has been built in all dimensions

1. Supporting regulations have been formulated to improve the business environment from every angle. Local governments have promulgated and implemented the *Regulations on Optimizing the Business Environment* (hereinafter referred to as the "*Regulations*") successively, and in the local administrative legislation work, prioritized and promoted the formulation of, strengthened the review and revision of, and emphasized the effectiveness of, the regulations and laws related to business environment optimization, completing the legislative work related to optimizing the business environment with high quality. In order to ensure the effective implementation of the reform measures in the *Regulations*, Beijing Municipal Commission of Development & Reform organized various units in advance to study various supporting policies for the implementation of the *Regulations*, and sorted out a total of 82 supporting policies and measures that need to be introduced, including 24 policies and measures to solidify existing experience or policies, such as the establishment of an administrative checklist system, a rating system for government services, a 12345 service hotline, and a fair competition review system. In order to ensure the effective implementation of the *Regulations*, the Heilongjiang Province People's Government took the lead in the country in carrying out special local legislation for business environment supervision, and successively issued laws and regulations such as the *Business Environment Supervision Measures*, *Social Credit Regulations*, and *Regulations on Promoting the Development of Small and Medium-sized Enterprises*, laying a solid rule-of-law foundation for optimizing the business environment.

2. The laws and regulations on digital economy have been continuously improved. China attaches great importance to the development of the digital economy and has been continuously improving the business environment by introducing a series of laws and regulations, including the *Cybersecurity Law*, *E-Commerce Law*, *Data Security Law*, and *Personal Information Protection Law*, revising the *Anti-unfair Competition Law* twice, publishing the draft revision of the *Anti-monopoly Law*, and formulating and publishing the *Anti-monopoly Guidelines on the Platform Economy*. The government also increased enforcement efforts and established the Anti-monopoly Bureau. Relevant departments have strengthened supervision and law enforcement in the field of digital economy platforms since last year, and investigated and punished illegal acts such as mandatory choice and mandatory stranglehold acquisition. Under the guidance of the regulatory authorities, platform operators have carried out comprehensive rectification, and the digital economy is experiencing a transition to a new stage of standardized and orderly development.

3. The intellectual property rights (IPR) protection system and policies have been established and improved. In order to promote the construction of a powerful IPR country, comprehensively improve the level of IPR creation, use, protection, management, and service, and give full play to the important role of the IPR system in socialist modernization, the Supreme People's Court issued the *IPR Judicial Protection Plan for People's Courts (2021-2025)* in April 2021. In September, the CPC Central Committee and the State Council issued the *Outline for Building a Strong Intellectual Property Country (2021-2035)*. In October, the State Council issued the *14th Five-Year National Plan for Intellectual Property Protection and Application*, and in December, the 32nd meeting of the Standing Committee of the 13th National People's Congress amended and adopted the *Law on Scientific and Technological Progress*, which will come into effect on January 1, 2022. The introduction of the Law on Scientific and Technological Progress represents China's aim of creating a social environment that respects intellectual property rights, protects intellectual property rights, and stimulates independent innovation. In addition, China has promoted the amendment of the implementation rules of the *Anti-monopoly Law*, *E-commerce Law* and *Patent Law* to refine the anti-monopoly and anti-unfair competition rules, prevent and stop monopoly and unfair competition in the platform economy, and guide platform operators to operate in compliance with laws and regulations.

(II) Remarkable results have been achieved in IPR protection

1. "Double breakthroughs" have been achieved in acceptance and conclusion of cases. In 2021, the number of IPR cases accepted and concluded by the people's courts both exceeded 600,000, setting a record high. In 2021, about 643,000 new first-instance, second-instance, and retrial cases were accepted, and about 602,000 IPR cases (including old ones) were concluded, up 22.33% and 14.71% respectively compared with 2020.

2. IPR infringements have been cracked down with high intensity. In 2021, China investigated and dealt with 50,100 cases of patent and trademark violation and 2,957 cases of copyright infringement and piracy, removed 1.197 million links involving copyright infringement and piracy, and approved the arrest of more than 7,800 people involved in over 4,500 IPR infringement crimes. The "Kunlun 2021" special operation was launched to crack down on IPR infringement crimes in accordance with the law. Public security organs across the country cracked more than 21,000 criminal cases involving IPR infringement and manufacture and sale of counterfeit and shoddy goods. Adhering to the equal protection of various market entities in accordance with the law, China has successively detected and cracked a number of major IPR infringement cases to ensure an excellent business environment on a strict rule-of-law basis.

3. The administrative protection of customs has been strengthened. The "Dragon Action 2021" special operation was carried out for IPR protection. In 2021, the customs across the country seized 79,200 batches of import and export goods suspected of IPR infringement, involving 71,803,000 pieces of goods. The seized goods were suspected of infringing exclusive trademark rights, patent rights, copyrights, Olympic symbols and World Expo symbols. Among them, 79,000 batches of 68.046

million pieces of goods were suspected of infringing trademark rights, 85 batches of 2.933 million pieces of goods suspected of infringing patent rights, 233 batches of 815,000 pieces of goods suspected of infringing copyrights, and 8 batches of 8,381 pieces of goods suspected of infringing Olympic symbols and World Expo symbols.[①]

(III) Market fairness and healthy development have been safeguarded by judicial means.

1. Fair competition in the market has been safeguarded by judicial means. In 2021, the people's courts continued to strengthen the enforcement of anti-monopoly and anti-unfair competition laws, concluding 49 monopoly cases and 7,478 unfair competition cases. Meanwhile, the people's courts also explored the rules of data rights protection, served the digital economy, and promoted the development of e-commerce. The people's courts tried monopoly and unfair competition cases such as mandatory choice, fraudulent trading and credit fraud on platforms, and severely punished acts that hindered fair competition and harmed the interests of the public.

2. Judicial authorities have assisted in orderly withdrawal and effective rescue of market entities. In 2021, the people's courts concluded a total of 13,000 bankruptcy cases involving CNY 2.3 trillion of claims, promoting the survival of the fittest and the efficient allocation of resources. Giving full play to the "active rescue" and "timely liquidation" functions of bankruptcy trials, the people's courts resolutely prevented evasion of debts in the name of bankruptcy. In addition, the people's courts cooperated with the Standing Committee of the National People's Congress to carry out inspections on the enforcement of the Enterprise Bankruptcy Law to promote the improvement of the bankruptcy legal system. For example, the

[①]China National Intellectual Property Administration *2021 White Paper on Protection for IP Rights in China* ruling on the first case under Shenzhen's regulations on personal bankruptcy came into effect, allowing honest and trustworthy debtors who operate in accordance with the law to start again from scratch, laying an important milestone in the development of the personal bankruptcy system. A total of 732 bankruptcy and reorganization cases were concluded, CNY 1.5 trillion of assets were revitalized, 745 distressed enterprises were rescued, and more than 350,000 employees stabilized their employment.

III. A Unified Nationwide Market Gradually Formed

(I) Market segmentation has been further broken down

In November 2021, the State Council issued the *Opinions on Rolling out Pilot Programs on Business Environment Innovation*, [①]which proposed key task to further remove unreasonable restrictions such as regional segmentation and local protection to speed up the removal of institutional barriers that prevent market-oriented allocation of production factors and circulation of goods and services, and listed six specific reform actions to be implemented in pilot cities, including: promoting the reform of "one license with multiple addresses" and "one certificate with multiple addresses"; facilitating the change of information of corporate branches and chain stores; removing hidden thresholds and barriers set up for foreign companies in the field of bidding and government procurement; promoting the compatibility and mutual recognition of digital certificates in the field of bidding; promoting cross-regional mutual recognition and verification of electronic certificates for passenger and cargo transportation; and optimizing the application process for cross-regional circulation inspection and quarantine of common low-risk plants and plant products.

In March 2022, the *Opinions on Accelerating the Construction of a*

[①]Website of Chinese government http://www.gov.cn

Unified National Market was released,[①] in which the government proposed to accelerate the establishment of the rules for a unified national market system, remove restrictions of local protection and market segmentation, break through key blockages that hinder economic circulation, promote the smooth flow of commodity factor resources in a wider range, and speed up the construction of an efficient, standardized, fully open national unified market ensuring fair competition. The *Opinions* also clarified the key task of accelerating the construction of a national unified market from the following six aspects: 1. strengthening the unification of underlying market rules and regulations; 2. promoting connectivity of market facilities according to high standard; 3. creating a unified factor and resource market; 4. promoting high-level unification of the commodity and service markets; 5. promoting fair and unified market supervision; and 6. further regulating inappropriate market competition and market intervention.

In October, the General Office of the State Council issued the *Circular on Replicating and Promoting Pilot Business Environment Innovation and Reform Measures*,[②] which once again proposed to further remove unreasonable restrictions such as regional segmentation and local protection. The specific reform actions include promoting the reform of "one license with multiple addresses"; facilitating the change of information of corporate branches and chain stores; removing hidden thresholds and barriers set up for foreign companies in the field of bidding and government procurement; and promoting cross-regional mutual recognition and verification of electronic certificates for passenger and cargo transportation;

[①]Ibid.
[②]Ibid.

(II) Institutional transaction costs have been reduced

Optimizing the business environment and reducing institutional transaction costs are important measures to alleviate the burden on market entities and stimulate market vitality. The current economic operation is facing some prominent contradictions and problems, and there are many difficulties troubling market entities, especially small, medium and micro enterprises, and individual industrial and commercial households, in their production and operation. The General Office of the State Council issued the *Opinions on Further Optimizing the Business Environment and Reducing Institutional Transaction Costs of market entities* in September 2022 to thoroughly implement the decisions and deployments of the CPC Central Committee and the State Council, create a market-oriented, rule-of-law and internationalized business environment, reduce institutional transaction costs, boost the confidence of market entities, help them develop, and provide strong support for stabilizing the macroeconomic market. [①]The *Opinions* proposed to solves problems for small, medium and micro enterprises, and individual industrial and commercial households from the following five perspectives: 1. further removing hidden thresholds and promoting the reduction of market access costs; 2. further standardizing enterprise-related charges and promoting the reduction of operating burdens on market entities; 3. further optimizing enterprise-related services and promoting the reduction of market service costs for market entities; 4. further strengthening fair competition supervision and effectively protecting the legitimate rights and interests of market entities; and 5. further regulating administrative powers and effectively stabilizing policy expectations of market entities.

In order to promote the long-term and healthy development of

[①]Website of Chinese government http://www.gov.cn individual industrial and commercial households and to solve the "urgent, difficult and annoying" problems for them, the State Council promulgated the *Regulations on Promoting the Development of Individual Industrial and Commercial Households* in October 2022, which came into effect on November 1, 2022. [①]Individual industrial and commercial households are the most direct service providers of people's lives. As of the end of September 2022, there were 111 million registered individual industrial and commercial households nationwide, accounting for two-thirds of the total market entities in China. Creating employment for nearly 300 million people, they play an important role in stabilizing growth, promoting employment and benefiting people's livelihood. The new *Regulations* were formulated on the basis of the original *Regulations on Individual Industrial and Commercial Households* and in light of the overall situation, problems and interests of individual industrial and commercial households, and are conducive to better promoting their long-term and healthy development.

The new *Regulations* have further reduced the institutional transaction costs. Individual industrial and commercial households are mainly engaged in the wholesale and retail, catering and resident service industries. The new *Regulations* cover offline and online operations. On the one hand, the new *Regulations* support individual industrial and commercial households to engage in business activities closely related to the daily life of residents in the community to satisfy the needs of residents' daily consumption; on the other hand, the new *Regulations* guide and support individual industrial and commercial households to accelerate digitalization and improve online operating capabilities. At the same time, the new *Regulations* specifically provide the obligations of platform operators in response to various problems raised by individual industrial and commercial households when

[①]Ibid.

carrying out online operations on the platforms. According to the original regulations and related registration regulations, an individual industrial and commercial household that changes the operator, in other words, "sells" the store or transfers management rights, must re-apply for registration except for changes between family members, that is, cancel the original individual industrial and commercial household and apply for the establishment of a new one. To solve this problem, the new *Regulations* have adjusted such procedures, allowing individual industrial and commercial households directly apply to the business registration authority for such changes". This provision facilitates the transfer of the operating rights of individual industrial and commercial households, realizes the continuation of the establishment time, name and relevant administrative licenses of individual industrial and commercial households, greatly simplifies procedures, reduces institutional transaction costs, and encourages individual industrial and commercial households to maintain long-term operations and build "century-old brands".[①]

IV. The Investment Confidence of Foreign-capital Enterprises Continues to Enhance

(I) A steady increase in foreign investment introduction has been achieved with improved quality

Since the beginning of this year, in the face of the increasingly complex and severe international situation and new problems such as weak cross-border investment, China has overcome multiple difficulties and achieved a steady increase in foreign investment introduction with improved quality. Data from the Ministry of Commerce shows that from

[①]Xinhua News Agency "Promoting Individual Industrial and Commercial Households to Achieve Long-term and Healthy Development - Comments on the *Regulations on Promoting the Development of Individual Industrial and Commercial Households*"

January to October 2022, the actual amount of foreign capital used nationwide reached CNY 1,089.86 billion, close to that of the whole year of 2021, up 14.4% year-on-year on a comparable basis. It is equivalent to USD 168.34 billion, increasing by 17.4%. From the perspective of industrial structure, the year-on-year growth of the utilization of foreign capital in the high-tech industries across the country is higher than the average: 57.2% in high-tech manufacturing and 25% in high-tech services. The sources of foreign investment have become more diversified and balanced. The actual investment from South Korea, Germany, the United Kingdom and Japan have increased by 106.2%, 95.8%, 40.1% and 36.8% year-on-year respectively. From the regional perspective, the growth of foreign capital utilization in the central and western regions was higher than that in the eastern region, and the actual foreign capital used in the eastern, central and western regions has increased by 12.4%, 33.6% and 26.9% respectively.

(II) A series of policies and measures have been introduced to "attract and stabilize foreign investment"

The *2022 Government Work Report* and the *Circular of the State Council on the Issuance of a Package of Policies and Measures to Stabilize the Economy* both explicitly call for expanding the scope of foreign investment and supporting foreign investors to increase investment in medium and high-end manufacturing, R&D, modern services and other fields and in the central, western and northeastern regions. The National Development and Reform Commission and other departments issued the *Policy Measures on Promoting the Quantity and Quality of Foreign Investment in the Manufacturing Sector* to further expand the inflow of foreign capital, maintain the volume of foreign investment, improve the quality of foreign capital utilization, and better play the positive role of foreign capital in promoting the high-quality development of China's manufacturing industry and deepening its integration into the global industrial chain and supply chain in October 2022. Three major measures are included: 1. optimizing the investment environment and expanding the inflow of foreign investment; 2. strengthening investment services and supporting the development of foreign invested enterprises; and 3. guiding the direction of investment and improving the quality of foreign investment. Specifically, there are 15 measures including implementing in-depth the negative list for foreign investment access, implementing national treatment after foreign investment access at high standard, encouraging foreign invested enterprises to reinvest profits, supporting the import and export of foreign invested enterprises in manufacturing, optimizing the structure of foreign investment, and supporting the innovative development of foreign investment. [①] Subsequently, the National Development and Reform Commission and the Ministry of Commerce publicly released the *Catalogue of Industries for Encouraging Foreign Investment (2022 Edition)*, [②] which, as an important foreign investment promotion policy of China, has played an important role in supporting the development of foreign investment, guiding the direction of foreign investment in desired industries, and optimizing the regional layout of foreign investment. There are three main changes in this revision: 1. China continues to encourage foreign investors to invest in advanced manufacturing; 2. China continues to guide foreign investment in modern service industries; and 3. China continues to guide foreign investment in advantageous industries in the central, western and northeastern regions. The industries listed in the catalogue are entitled to three preferential policies: 1. Imported self-use equipment within the total investment, except

[①] Ministry of Commerce of China http://www.mofcom.gov.cn
[②] Ibid.

for products that are not exempted by the state, is exempt from tariffs; 2. Priority of land supply can be given to encouraged industrial projects with intensive land use, and the base price can be no less than 70% of the lowest price for the transfer of industrial land in the country corresponding to the grade of location; and 3. Enterprises investing in the western region and Hainan Province are entitled to the corporate income tax rate of 15%. [①]

(III) The CCPIT has set up a task force to serve foreign investment to strengthen the confidence of foreign enterprises to take root in China

The executive meeting of the State Council held in June 2022 pointed out that opening up to the outside world is the basic national policy of China, and stabilizing foreign trade and foreign investment is fundamental to the overall economic situation and employment. Therefore, we should further open up to the outside world. In addition, we should enhance support while implementing the policies that have been introduced to stabilize foreign trade and foreign investment. The attendants pointed out at the meeting that ensuring the stability of production and circulation of foreign trade and foreign-capital enterprises is the top priority in the current work of stabilizing foreign trade and foreign investment. It is necessary to give full play to the role of mechanisms at all levels to stabilize foreign trade and foreign investment, and to perform timely coordination to solve difficulties of foreign trading and foreign invested enterprises to resume production, reach design capacity, and implement projects. We should also guide local governments to innovate measures to stabilize foreign trade and foreign investment.

With the approval of the State Council, the CCPIT has set up a task force to serve foreign-capital enterprises, established a bottom-up,

[①]Ibid.

convenient and fast channel for reflecting foreign-capital enterprises' demands, and further consolidated the smooth-running service system for foreign-capital enterprises. This effort has mobilized the national trade promotion system to serve foreign-capital enterprises as an important starting point and platform for stabilizing foreign investment and the macroeconomic market. Since the establishment of the task force, the CCPIT has directed the unified action of the national trade promotion system as a whole, strengthened collaboration with relevant departments, and collected demands of hundreds of foreign-capital enterprises extensively by holding seminars, establishing direct reporting platforms, keeping close contact with enterprises and conducting in-depth research. After sorting, screening, classifying, summarizing and refining, the demands are promptly reported to relevant departments in a timely manner, helping a large number of foreign-capital enterprises to effectively solve their urgent, difficult and annoying problems, and increasing the smoothness of their supply chain and industrial chain. Thus, the task force has been highly praised by foreign-capital enterprises.

V. Technological Innovation Advanced in All Aspects

(I) Top-level policies have been released to lead the way

On the basis of the *Guiding Opinions on Promoting the Healthy Development of Small and Medium-sized Enterprises*, ①six departments including the Ministry of Finance, the Ministry of Commerce, the State-owned Assets Supervision and Administration Commission of the State Council, and the China Securities Regulatory Commission jointly issued the *Guiding Opinions on Accelerating the Cultivation and Development of High-Quality Manufacturing Enterprises* in June 2021. ②In November, the

① Ministry of Science and Technology of China http://www.scio.gov.cn
②Website of Chinese government http://www.gov.cn

Office of the State Council Leading Group for Promoting the Development of Small and Medium-sized Enterprises issued the *List of Practical Benefits for Specialized and Sophisticated SMEs* and *Several Measures to Improve the Competitiveness of Small and Medium-sized Enterprises*. The policies and measures above were formulated, based on the situation of the new development stage, to promote high-quality development of enterprises, constantly improve the system, refine policies, optimize services, and enhance independent innovation capabilities of enterprises. [①] China will leverage fiscal and HR policies and measures to accelerate the cultivation and development of a number of specialized and sophisticated "little giants", and guide such "little giants" in key industries and fields to grow into international champions in certain aspects, and large enterprise groups into leaders with ecological dominance and international competitiveness.

(II) The mechanism for the transformation of scientific and technological achievements have become increasingly perfect.

1. The system and rules for the transfer and transformation of scientific and technological achievements have been improved. The revised *Law on Scientific and Technological Progress* places the transformation of scientific and technological achievements in a prominent position. The law has been greatly expanded in both length and content, and serves as the basic law for scientific and technological innovation, upgrading the important decisions and policy measures in the *Law on the Promotion of the Transformation of Scientific and Technological Achievements* since its implementation in 2015, as well as the proven experience and practices to legal norms.

[①] Ibid.②

2. The evaluation mechanism for scientific and technological achievements has been perfected. Evaluation is a key step in the transfer and transformation of scientific and technological achievements. A perfect evaluation mechanism for scientific and technological achievements can significantly improve the effectiveness of their transfer and transformation. The *Guiding Opinions on Improving the Evaluation Mechanism for Scientific and Technological Achievements* issued by the General Office of the State Council in July 2021 proposes that[①] "we should give full play to the role of the evaluation of scientific and technological achievements as a 'baton' to comprehensively and accurately reflect the level of innovation, transformation and application performance of the achievements and their actual contribution to economic and social development, and strive to strengthen the high-quality supply and transformation of the achievements."

3. Incentive policies for the transformation of scientific and technological achievements have been implemented. Offering incentives for scientific and technological personnel to implement the transformation of scientific and technological achievements is a major way to stimulate the primary power and activate the primary resource, and the key is to implement the policy of rewarding such efforts. Many national documents have emphasized the necessity to distribute incentives to scientific and technological personnel. To guide relevant departments to formulate and implement the policy related to incentives and remuneration for the transformation of scientific and technological achievements, the Ministry of Human Resources and Social Security, the Ministry of Finance, and the Ministry of Science and Technology issued in February 2021 the *Notice on Issues Related to the Inclusion of Cash Rewards for the Transformation of Scientific and Technological Achievements of Public*

[①]Ibid.②

Institutions' Researchers into Performance-Based Salary, [1]which clarifies that the reward for the transformation of scientific and technological achievements is not subject to the total performance-based salary cap, and will not be included as the base for calculating the next year's performance-based salary or social insurance contributions.

(III) Fiscal and tax support has been enhanced

To optimize the business environment for innovative enterprises, increase innovation momentum, stimulate their innovation vitality, and serve China’s innovation-driven development strategy, the Ministry of Finance, the General Administration of Customs, and the State Taxation Administration launched several preferential tax policies in 2021 to solve the problems in the key steps and areas of scientific and technological innovation, such as the *Notice on Import Tax Policies to Support the Development of Integrated Circuit Industry and Software Industry (CGS [2021] No. 4)*, *Announcement on Extending the Implementation Period of Some Tax Preferential Policies (Announcement No. 6 [2021] of the State Taxation Administration of the Ministry of Finance)*, *Announcement on Further Improving the Policy on Extra Pre-tax Deduction of R&D Expenses (Announcement No. 13 [2021] of the State Taxation Administration of the Ministry of Finance),* and *Notice on Import Tax Policies to Support Scientific and Technological Innovation during the 14th Five-Year Plan Period (CGS [2021] No. 23)*. These policies has provided strong support for scientific and technological innovation enterprises in terms of tax deduction for R&D expenses, and exemption of VAT on imports of research materials, property tax and urban land use tax.

[1]Website of Chinese government http://www.gov.cn