

2022年重庆市外商投资环境测 评报告

Evaluation Report on Foreign Investment Environment in Chongqing in 2022

重庆市外商投资企业协会
Chongqing Association of Foreign Investment Enterprises

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重庆市外商投资企业协会
Chongqing Association of Enterprises
with Foreign Investment



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卷首语

Foreword



为贯彻落实党中央、国务院决策部署，做好稳外资相关工作，推动重庆市营商环境持续优化，重庆市外商投资企业协会组织继续主持2022年重庆市外商投资环境测评报告（以下简称2022测评报告），旨在密切跟踪外商投资企业的意见和建议、深入分析近年来重庆外商投资环境变化，全面客观反映营商环境建设成就及存在的问题，以助力重庆营商环境优化。

In order to do a good job in stabilizing foreign investment and promoting the continuous optimization of the business environment in Chongqing, the Chongqing Association of Foreign Investment Enterprises continued to preside over the evaluation report of the foreign investment environment in Chongqing in 2022 (hereinafter referred to as the 2022 evaluation report), aiming at closely tracking the opinions and suggestions of foreign-invested enterprises and thoroughly analyzing them in recent years. It comprehensively and objectively reflects the achievements and problems in the construction of business environment, so as to help optimize the business environment in Chongqing.

2022年测评调研延续了前六个年度的主要测评内容，对包括基础环境、市场环境等各项投资环境开展调查，另外专门针对“服务业扩大开放”和“重庆承接国际和东部产业转移”两个专题进行了调查，累计收到416份有效问卷反馈。本次调研也获得了作为全球领先的咨询服务机构之一安永的大力支持和协助，安永参与了调查问卷设计、数据整理以及简报编制。

The 2022 evaluation survey continued the main evaluation contents of the previous six years, including the basic environment, market environment and other investment environments. In addition, a special survey was conducted on the two topics of "expanding the opening of service industry" and "Chongqing undertaking international and eastern industrial transfer". In this survey, we received 416 valid questionnaire responses. At the same time, we have also received strong support and assistance from Ernst & Young, one of the world's leading consulting services. Ernst & Young participated in the design of the questionnaire, the collation of the data and the preparation of the briefing.



重庆市外商投资企业协会

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简介 Introduction

重庆市外商投资企业协会（以下简称“协会”）成立于1988年，隶属于重庆市商务委员会，是重庆市外商投资（含港澳台侨投资）企业自愿加入组成的非营利社会团体，是重庆市4A级社会组织。三十多年来，协会在重庆市委、市政府的高度关注和大力支持下，在市商务委及市级相关部门的指导下，秉承“凝聚会员、服务企业、联系政府、回馈社会”的服务宗旨，充分发挥政府与外企之间的“桥梁、纽带”作用，推动在渝外商投资企业健康发展和积极参与重庆市社会、经济建设，赢得了在渝外企及社会各届的赞誉和信任，在国内外树立了良好形象和广泛影响。Established in 1988, Chongqing Association of Enterprises with Foreign

Investment (hereinafter referred to as the "Association") is affiliated to the Chongqing Municipal Commission of Commerce. It is a non-profit social organization voluntarily joined by enterprises with foreign investment (including investment from Hong Kong, Macao, Taiwan and overseas Chinese) in Chongqing. It is a 4A-level social organization in Chongqing. For more than 30 years, the Association has been adhering to the service tenet of "gathering members, serving enterprises and giving back to society", giving full play to the role of "bridge and link", promoting the healthy development of foreign-invested enterprises in Chongqing and actively participating in the social and economic construction of Chongqing, winning praise and trust from foreign enterprises and society in Chongqing, and establishing a good image and wide influence at home and abroad.

*资料来源：重庆外商投资企业协会网 <http://www.cqaefi.com>

**资料来源：重庆外商投资企业协会微信公众号

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重庆市外商投资企业投资环境基础问卷调查结果分析 An Analysis of the Results of the Questionnaire Survey on the Investment Environment of Foreign Invested Enterprises in Chongqing



概述 Overview

- ▶ 2022年，重庆市遭遇了抗疫三年来最严峻的疫情、极端的高温干旱天气、严重的电力资源紧张，经济社会发展面临多重挑战。一年来，全市上下兼顾疫情防控和经济社会发展，有力应对各种超预期因素冲击，经济发展保持恢复态势。重庆市政府全力稳投资、促消费、保市场主体，100项营商环境创新试点事项取得阶段性成效，持续营造一流营商环境。

In 2022, Chongqing faced multiple challenges such as the most severe epidemic in the past three years, extreme high temperature and drought weather, and severe shortage of power resources. However, the whole city took into account both epidemic prevention and control and economic and social development, effectively responded to the impact of various unexpected factors, and maintained a recovery trend in economic development. The Chongqing Municipal Government has made every effort to stabilize investment, promote consumption and protect market players, and has achieved phased results in 100 pilot projects of business environment innovation, continuously creating a first-class business environment.

- ▶ 结合多项测评结果，可以看出大部分受访企业在2022年经营较为困难，信心受到一定程度的打击，这与2020年情况类似。2020年由于疫情爆发，受访企业对各项投资环境的满意度普遍下降，跌至近五年最低水平，但随着2021年中国疫情管控较好，企业信心迅速恢复至2019年测评水平。因此，随着2022年疫情结束，我们有理由相信企业信心将迅速恢复。

Combined with a number of evaluation results, it can be seen that most of the enterprises surveyed are more difficult to operate in 2022, and their confidence has been hit to a certain extent, which is similar to the situation in 2020. In 2020, due to the outbreak of the epidemic, the satisfaction of the enterprises surveyed with the investment environment generally declined, falling to the lowest level in nearly five years, but with the better control of the epidemic in China in 2021, the confidence of enterprises rapidly recovered to the evaluation level in 2019. Therefore, with the end of the epidemic in 2022, we have reason to believe that business confidence will recover rapidly.

1.1 投资环境总体满意度

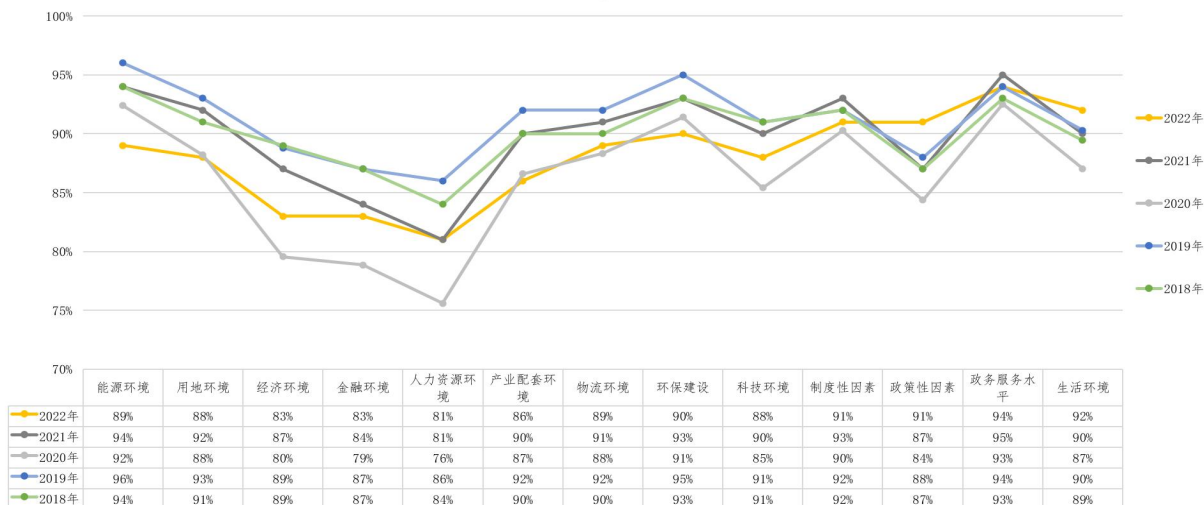
Overall satisfaction with investment environment

近五年满意度变化

Change in satisfaction in the last five years

2022年测评调研针对能源环境、用地环境、经济环境等共十三项投资环境进行了测评，近五年总体满意度变化情况如下：

A total of 13 investment environments, including energy environment, land use environment and economic environment, were evaluated in the 2022 evaluation survey, and the overall satisfaction changes in the past five years are as follows:



总体评价

Overall evaluation

近五年来，投资环境总体满意度受疫情影响波动较为明显。2018年和2019年总体满意度逐年提升，但随着新冠疫情爆发，2020年满意度急剧下降，跌至近五年最低水平。2021年中国疫情防控卓有成效加之外贸大增，总体满意度回升至2018年和2019年平均水平，但2022年受疫情管控压力、夏季高温火灾等客观因素，2022年总体满意度又大幅下降，但较2020年略高。

In the past five years, the overall satisfaction of the investment environment has been affected by the epidemic. In 2018 and 2019, the overall satisfaction increased year by year, but with the outbreak of COVID-19, the satisfaction dropped sharply in 2020, falling to the lowest level in nearly five years. In 2021, China's epidemic prevention and control was effective and foreign trade increased greatly, and the overall satisfaction rose to the average level in 2018 and 2019. However, due to objective factors such as epidemic control pressure, high temperature and fire in summer, the overall satisfaction in 2022 dropped sharply, but slightly higher than that in 2020.

1.2 满意度较高的投资环境

Investment environment with high satisfaction

1.2.1 政务服务水平

Government service level

► 总体评价

Overall evaluation

历年测评中，政务服务水平一直以来均获得受访企业的较高评价。2022年政务服务水平满意度为94%，维持在较高水平。2022年9月8日，国务院办公厅电子政务办公室发布《省级政府和重点城市一体化政务服务能力调查评估报告（2022）》，重庆等全国16个省级政府的一体化政务服务能力总体指数超过90，被评为“非常高”。目前，重庆市依托国家政务服务平台服务集成、数据集成优势，充分利用“渝快办”政务服务平台信息资源，整合市级各部门发放的各类卡码证，实现“多码合一、一码核验”，推动“一企一档”、“一人一档”数据库建设。“渝快办”平台手机端全方位汇聚了市政府有关部门和单位提供的政务服务、便民服务事项，形成了全链化的政务服务工具箱。

In the evaluation over the years, the level of government service has always been highly evaluated by the enterprises interviewed. In 2022, the satisfaction of government service level was 94%, which was maintained at a high level. On September 8, 2022, the E-government Office released the Survey and Evaluation Report on the Integrated Government Service Capability of Provincial Governments and Key Cities (2022). The overall index of the integrated government service capability of 16 provincial governments in China, including Chongqing, exceeded 90, which was rated as "very high". At present, relying on the advantages of service integration and data integration of the national government service platform, Chongqing makes full use of the information resources of the "Chongqing Express Office" government service platform, integrates all kinds of cards and certificates issued by various departments at the municipal level, realizes "multi-code integration, one-code verification", and promotes the database construction of "one enterprise, one file" and "one person, one file". The mobile terminal of "Chongqing Express Office" platform brings together the government services and convenience services provided by the relevant departments and units of the municipal government in an all-round way, forming a full-chain government service toolbox.

安永建议 Ernst & Young recommends

相关部门继续延展线上政务服务深度，升级政务服务微信公众号，开发智能客服系统，推动线上智能客服与人工客服融合发展；加快推进“通办类”事项覆盖面，加快推动“川渝通办”事项落地见效；继续打造更加规范、高效、便捷的政务服务中心，下沉自助服务终端至各街道、社区等服务网点，进一步延伸服务半径。

Relevant departments continue to extend the depth of online government services, upgrade the WeChat public account of government services, develop intelligent customer service system, and promote the integration of online intelligent customer service and manual customer service; accelerate the coverage of "universal" matters, and accelerate the implementation of "Sichuan-Chongqing universal" matters; We will continue to build more standardized, efficient and convenient government service centers, sink self-service terminals to service outlets in streets and communities, and further extend the service radius.

1.2 满意度较高的投资环境

Investment environment with high satisfaction

1.2.1 政务服务水平

Government service level

重庆在行动 Chongqing's action

2021年6月21日，由重庆市商务委牵头建设的“重庆市外资企业智慧服务云平台”（以下简称“云平台”）正式上线运行。云平台设立惠企政策、重庆发展动态、外商投资环境调研、专业和公共服务协助等多个模块，加大政策宣传推广力度，实时为外商投资企业提供线上服务；云平台开设外商投资企业线上投诉协调通道，与市政府“互联网+督查”平台实现外企投诉转办功能对接，及时在线回复受理通知和办理意见，保证外商投资企业诉求处置质量；云平台开展多项线上专题调研，汇总收集外商投资企业的困难与建议诉求，及时报请相关市级部门、区县、开放平台给予回复和协调解决。云平台的设立有效推动外资企业服务线上线下融合，是重庆外商投资全流程服务的全新升级，也是重庆政府创新服务方式的体现。

On June 21, 2021, the "Intelligent Service Cloud Platform for Foreign-funded Enterprises in Chongqing" (hereinafter referred to as "Cloud Platform"), led by the Chongqing Municipal Commission of Commerce, was officially launched. Cloud platform set up preferential enterprise policy, Chongqing development trends, foreign investment environment research, professional and public service assistance and other modules, increase policy publicity and promotion efforts, real-time online services for foreign-invested enterprises; The cloud platform opens an online complaint coordination channel for foreign-invested enterprises, and connects with the "Internet + supervision" platform of the municipal government to realize the function of transferring complaints from foreign enterprises, and timely replies to the notice of acceptance and handling opinions online, so as to ensure the quality of handling the appeals of foreign-invested enterprises; Cloud platform carries out a number of online thematic research, collects specific difficulties and suggestions of foreign-invested enterprises, and timely reports to relevant municipal departments, districts, counties and open platforms for response and coordination. The establishment of cloud platform effectively promotes the integration of online and offline services of foreign-funded enterprises, which is a new upgrade of the whole process of foreign investment services in Chongqing, and also reflects the innovative service mode of Chongqing government.

1.2 满意度较高的投资环境

Investment environment with high satisfaction

1.2.2 政策性因素

Policy factors

► 总体评价

Overall evaluation

政策性因素主要包括公平竞争、反垄断管制、市场和行业准入限制、国民待遇、知识产权保护、退出管制、劳工政策、跨境资金调拨共九项指标。2022年该九项指标满意度均较2021年有所上升，基本达到90%及以上，为近五年最高水平。其中，公平竞争和反垄断管制满意度最高，均为92%（分别较2021年上升2%和4%）。

Policy factors mainly include nine indicators, including fair competition, anti-monopoly control, market and industry access restrictions, national treatment, intellectual property protection, exit control, labor policy and cross-border fund allocation. In 2022, the satisfaction of the nine indicators increased compared with 2021, basically reaching 90% or more, the highest level in the past five years. Among them, the satisfaction of fair competition and anti-monopoly regulation is the highest, both 92% (up 2% and 4% respectively from 2021).

针对政策性因素，受访企业总体评价较高。说明有关部门在提高投资效率、清除市场壁垒、降低制度成本，激发市场活力等方面取得了显著成效，为推动企业高质量发展创造了良好条件。例如，在市场准入领域着力推行企业办事依托电子营业执照“一照通办”；在国际贸易以及跨境资金调拨领域，着力推进口岸通关模式和物流模式改革，拓展国际贸易“单一窗口”功能，创新国际贸易跨境融资结算服务。

In view of the policy factors, the overall evaluation of the enterprises interviewed is relatively high. It shows that the relevant departments have achieved remarkable results in improving investment efficiency, removing market barriers, reducing system costs and stimulating market vitality, which has created good conditions for promoting high-quality development of enterprises. For example, in the field of market access, efforts should be made to promote the "one-size-fits-all" operation of enterprises relying on electronic business licenses; in the field of international trade and cross-border capital allocation, efforts should be made to promote the reform of customs clearance and logistics modes at ports, expand the "single window" function of international trade, and innovate cross-border financing and settlement services for international trade.

1.2 满意度较高的投资环境

Investment environment with high satisfaction

1.2.2 政策性因素 *Policy factors*

安永建议 Ernst & Young recommends

有关部门继续推进重庆知识产权保护中心建设，完善专利许可、交易、质押等运营体系，积极探索构建成渝一体化知识产权转让交易机制；深化土地、劳动力、资本、技术、数据等要素市场化配置改革，加快破除妨碍生产要素自由流动和商品服务流通的体制机制障碍；组织开展市场准入效能评估，建立市场准入负面清单制度执行情况监测、归集、通报制度，畅通市场主体对隐性壁垒的投诉及处理机制；深化投资审批制度改革，优化投资项目在线审批服务平台，分类规范审批程序、压减审批要件、简化技术审查事项。

Relevant departments will continue to promote the construction of Chongqing Intellectual Property Protection Center, improve the operation system of patent licensing, trading and pledge, and actively explore the construction of an integrated intellectual property transfer and trading mechanism between Chengdu and Chongqing; deepen the reform of market-oriented allocation of land, labor, capital, technology, data and other factors, and accelerate the removal of institutional and institutional obstacles to the free flow of production factors and the circulation of goods and services; We will organize and carry out market access efficiency evaluation, establish a monitoring, collection and notification system for the implementation of the negative list system for market access, and smooth the complaints and handling mechanism of market participants against hidden barriers; deepen the reform of the investment approval system, optimize the online approval service platform for investment projects, classify and standardize the approval procedures, reduce the approval requirements, and simplify the technical review matters.

1.2 满意度较高的投资环境

Investment environment with high satisfaction

1.2.3 生活环境

Living environment

► 总体评价

Overall evaluation

生活环境主要包括居住环境、教育水平、医疗卫生、语言环境、旅游、餐饮、物流便利、文化以及艺术和体育、公共交通、市容绿化、社会治安、物价水平共十二项指标。2022年总体满意度与2021年基本持平，部分指标有小幅上升。其中，社会治安和物流便利满意度最高，分别为95%和94%（较2021年分别上升1%和2%）；而教育水平、医疗卫生、语言环境满意度排名仍垫底，分别为87%、85%、85%。

Living environment mainly includes twelve indicators, including living environment, education level, medical and health care, language environment, tourism, catering, logistics convenience, culture, art and sports, public transport, city greening, social security and price level. The overall satisfaction in 2022 was basically the same as that in 2021, with a slight increase in some indicators. Among them, the satisfaction of social security and logistics convenience is the highest, 95% and 94% respectively (up 1% and 2% respectively from 2021), while the satisfaction of education level, health care and language environment is still at the bottom, 87%, 85% and 85% respectively.

针对生活环境，除2020年疫情爆发时有过较大波动外，受访企业满意度保持逐年上升的势头，说明重庆市在打造宜居之城方面取得了显著成效。2022年8月，重庆市人民政府正式印发《重庆市城市更新提升“十四五”行动计划》，集中力量推进城市功能与品质再提升、再升级，该行动计划提出多项具体措施和目标，例如：区域开发强度、组团规模、人口密度、环境质量符合国土空间总体规划要求，建成区绿化覆盖率超过43%，城镇老旧小区改造达到1亿平方米；健全安全风险防控体系和应急管理体制，城市防洪排涝、消防、人防、基础设施等韧性不断增强，城市内涝积水点基本消除；优化调整用地结构布局，统筹优化生产、生活用地空间和建筑总量规模平衡关系，控制新增居住用地开发强度和人口密度，增加高品质居住空间供给；构建权责明晰、服务为先、管理优化、执法规范、安全有序的城市管理体制机制，提升城市安全保障和韧性水平。

In view of the living environment, except for the large fluctuations in the outbreak of the epidemic in 2020, the satisfaction of the enterprises surveyed has maintained an upward trend year by year, which shows that Chongqing has achieved remarkable results in building a livable city. In August 2022, the Chongqing Municipal People's Government officially issued the 14th Five-Year Plan of Action for Urban Renewal and Upgrading in Chongqing, focusing on promoting the further upgrading and upgrading of urban functions and quality. The action plan puts forward a number of specific measures and objectives. Optimize and adjust the layout of land use structure, coordinate and optimize the balance between production and living land space and the total scale of construction, control the development intensity and population density of new residential land, increase the supply of high-quality residential space; build a clear power and responsibility, service-oriented, optimized management, standardized law enforcement, safe and orderly urban management system and mechanism, and enhance the level of urban security.

1.2 满意度较高的投资环境

Investment environment with high satisfaction

1.2.3 生活环境

Living environment

安永建议 Ernst & Young recommends

相关部门继续以打造高品质生活宜居地为引领，在城市品质升级、基础设施改善、生态环境提质等方面持续发力。继续优化“两江四岸”主轴，提升城市品质；完善城镇排水、地下综合管廊等基础设施，推进城市轨道、城市道路等项目建设，建设宜居城市。教育方面，推动市属优质高初中学校以建设新校区、托管、深度联盟等方式与各区县合作办学，增强区县教育整体实力，不断扩大优质教育资源总量；医疗卫生方面，加快优质医疗资源有序扩容和均衡布局，建立公共医疗资源及其配置的标准，合理化配置公共医疗资源，让公共医疗资源配置在实施过程中有据可依；语言环境方面，提升涉外管理、涉外教育、政务服务窗口普通话以及国际化语言环境建设。

Relevant departments continue to take the lead in creating high-quality livable places, and make sustained efforts in upgrading urban quality, improving infrastructure and improving ecological environment. We will continue to optimize the main axis of the "two rivers and four banks" and improve the quality of the city; improve urban drainage, underground comprehensive pipe galleries and other infrastructure, promote the construction of urban rail, urban roads and other projects, and build a livable city. In terms of education, we should promote municipal high-quality high and junior middle schools to cooperate with districts and counties in running schools by building new campuses, trusteeship and deep alliances, so as to enhance the overall strength of district and county education and continuously expand the total amount of high-quality educational resources; In terms of medical and health care, we should speed up the orderly expansion and balanced distribution of high-quality medical resources, establish standards for public medical resources and their allocation, rationalize the allocation of public medical resources, and provide evidence for the allocation of public medical resources in the implementation process. In terms of language environment, we should improve the construction of foreign management, foreign education, government service window Putonghua and international language environment.

1.3 满意度较低的投资环境

Investment environment with low satisfaction

1.3.1 经济环境

Economic Environment

► 总体评价

Overall evaluation

经济环境主要包括经济发展水平、市场消费能力、市场竞争自由性、对周边省市市场辐射能力共四项指标。2022年满意度分别为85%、82%、83%和81%，均较2021年有一定幅度下降，其中，市场消费能力满意度和对周边省市市场辐射能力满意度较2021年分别下降4%和5%，但大部分指标满意度较2020年疫情首次爆发时均高出五个百分点左右。

The economic environment mainly includes four indicators: the level of economic development, the ability of market consumption, the freedom of market competition and the ability of market radiation to the surrounding provinces and cities. In 2022, the satisfaction was 85%, 82%, 83% and 81% respectively. Among them, the satisfaction of market consumption capacity and market radiation capacity of surrounding provinces and cities decreased by 4% and 5% respectively compared with that in 2021, but the satisfaction of most indicators was about 5 percentage higher than that in 2020 when the epidemic first broke out.

针对经济环境，大部分受访企业反馈，受疫情影响正常经营活动较难开展，市场消费能力下降，需求减弱，经济发展活力下降，导致企业经营较以往年度更为困难。

In view of the economic environment, most of the enterprises interviewed reported that due to the impact of the epidemic, it was difficult to carry out normal business activities, the market consumption capacity declined, the demand weakened, and the vitality of economic development declined, which made the operation of enterprises more difficult than in previous years.

安永建议 Ernst & Young recommends

2022年受严峻复杂国际形势、疫情形势、极端高温天气等多重因素的反复冲击，重庆经济发展遭受多重挑战。但2022年经济环境满意度基本高于2020年疫情初次爆发时的满意度，表明相关部门已具备高效统筹疫情防控的成熟经验和相对更强的应对能力，各方面促进经济发展的政策效果也在逐步显现，最大限度降低了疫情等突发事件对经济社会发展的影响。后疫情时代，经济快速反弹的动能正在积蓄、释放，我国经济韧性强、潜力大、活力足、长期向好的基本面没有改变。安永建议，有关部门继续落实助企纾困、刺激消费、促进经济发展等政策，最大程度促进经济社会活力释放，助力经济加速回稳向好。

In 2022, due to the repeated impact of severe and complex international situation, epidemic situation, extreme high temperature weather and other factors, Chongqing's economic development suffered multiple challenges. However, the satisfaction of the economic environment in 2022 is basically higher than that in the first outbreak of the epidemic in 2020, indicating that the relevant departments have mature experience and relatively stronger response ability to effectively coordinate the prevention and control of the epidemic, and the policy effect of promoting economic development in all aspects is gradually emerging, which minimizes the impact of the epidemic and other emergencies on economic and social development. Ernst & Young suggested that relevant departments continue to implement policies to help enterprises, stimulate consumption and promote economic development, so as to maximize the release of economic and social vitality and help the economy to stabilize and improve.

1.3 满意度较低的投资环境

Investment environment with low satisfaction

1.3.2 金融环境

Financial Environment

► 总体评价

Overall evaluation

金融环境主要包括金融服务完备程度、融资便利性、融资成本共三项指标。2022年满意度分别为85%、84%、81%，除金融服务完备程度满意度较2021年下降3%外，另外两项指标满意度均与2021年基本持平。其中，融资成本满意度在金融环境中排名仍最低。

The financial environment mainly includes three indicators: the completeness of financial services, the convenience of financing and the cost of financing. In 2022, the satisfaction was 85%, 84% and 81% respectively. Except that the satisfaction of financial service completeness decreased by 3% compared with 2021, the satisfaction of the other two indicators was basically the same as that in 2021. Among them, the satisfaction of financing cost is still the lowest in the financial environment.

针对金融环境，满意度较低的受访企业大部分为中小企业，同时受访企业反馈存在以下问题：中小企业企业融资成本较高、金融机构融资门槛较高、融资额度较低以及融资方式较少，对创新服务的金融支持力度不足、政策不配套等。

In view of the financial environment, most of the respondents with low satisfaction are small and medium-sized enterprises. At the same time, the respondents have the following problems: the financing cost of small and medium-sized enterprises is higher, the financing threshold of financial institutions is higher, the financing quota is lower, the financing methods are less, the financial support for innovative services is insufficient, and the policies are not matched.

安永建议 Ernst & Young recommends

一方面中小企业面临市场不景气导致对借贷融资存在顾虑，另一方面资本市场在2022年整体遇冷导致财务投资人和产业投资人均对股权投资极为谨慎，因此并非市场无资金，而是中小企业难觅低成本资金。安永建议，虽然中小企业存有融资的先天劣势，但有关部门可以开展金融创新，完善明晰金融政策，拓宽中小企业融资渠道，通过融资创新对信用相对较差的中小企业提供多途径融资渠道；鼓励国有资本向具有核心竞争力的中型企业提供股权投资，探索国有资本在投资放权和过程监管的平衡性；进一步培育和完善的信用担保市场，使中小企业担保机构发挥更大的作用。

SMEs are facing market depression, which leads to concerns about loan financing, the overall cold of the capital market in 2022 leads to financial investors and industrial investors being extremely cautious about equity investment, so it is not that the market has no funds, but that SMEs are hard to find low-cost funds. Ernst & Young suggests that although SMEs have inherent disadvantages in financing, relevant departments can carry out financial innovation, improve and clarify financial policies, broaden financing channels for SMEs, and provide multi-channel financing channels for SMEs with relatively poor credit through financing innovation; We should encourage state-owned capital to provide equity investment to medium-sized enterprises with core competitiveness, explore the balance between investment decentralization and process supervision of state-owned capital, further cultivate and improve the credit guarantee market, and make SME guarantee institutions play a greater role.

1.3 满意度较低的投资环境

Investment environment with low satisfaction

1.3.3 人力资源环境

Human resources environment

► 总体评价

Overall evaluation

人力资源环境主要包括劳动力素质、获取普通劳动力便利性、获取中高级劳动力便利性、劳动力价格共四项指标。2022年满意度分别为82%、82%、78%、81%，除重庆劳动力素质满意度较2021年下降3%外，另外三项指标满意度均较2021年有小幅上升。其中，获取中高级劳动力便利性满意度在人力资源环境中仍最低。

Human resources environment mainly includes four indicators: the quality of labor force, the convenience of obtaining ordinary labor force, the convenience of obtaining middle and senior labor force, and the price of labor force. In 2022, the satisfaction was 82%, 82%, 78% and 81% respectively. Except that the satisfaction of labor quality in Chongqing decreased by 3% compared with 2021, the satisfaction of the other three indicators increased slightly compared with 2021. Among them, the satisfaction of obtaining the convenience of middle and senior labor force is still the lowest in the human resources environment.

针对人力资源环境，大部分受访企业反馈存在员工流动性较大、一线工人匮乏、难以获取满意的中高级人才等情况。

In view of the human resources environment, most of the enterprises surveyed reported that there were some problems, such as high mobility of employees, lack of front-line workers, and difficulty in obtaining satisfactory middle and senior talents.

安永建议 Ernst & Young recommends

西部市场的高端产业较沿海少，较难吸引高级人才在西部工作发展，大学生毕业后也面临高端岗位相对较少而转而去沿海求职。因此，响应国家号召打造高端制造业，对产业链进行补链强链，实现科技兴国，使人才在渝发展能够挣到钱，是吸纳人才的根。持续优化教育医疗生活等环境，稳住人才的心和魂，是吸引人才的本。安永建议，重庆应根据自身资源招徕高质量人才。重庆有相对完整的工业链、产业链，相关部门可以依托产业优势加大在高水平成人教育和职业教育上的投入，推动技能型人才能力提升。例如，结合重庆产业布局特征，依托产业园区布局职业教育基地，追踪企业生产需求，满足企业对技能型人才的需求；增加现有高等院校以及高职院校的投入力度，注重应用型、技能技术型人才培养，适当增加专业学位学生人数，提升中小企业人力资源管理水平。

There are fewer high-end industries in the western market than in the coastal areas, so it is difficult to attract high-level talents to work and develop in the western region. Therefore, responding to the call of the state to build high-end manufacturing industry, strengthen the chain of the industrial chain, realize the rejuvenation of the country through science and technology, and enable talents to earn money in the development of Chongqing is the root of absorbing talents. Ernst & Young suggested that Chongqing should attract high-quality talents according to its own resources. Chongqing has a relatively complete industrial chain and industrial chain, and relevant departments can rely on industrial advantages to increase investment in high-level adult education and vocational education to promote the ability of skilled personnel. For example, combined with the characteristics of Chongqing's industrial layout, meeting the needs of enterprises for skilled talents; increasing the investment of existing institutions of higher learning and higher vocational colleges, focusing on the training of applied, skilled and technical talents, appropriately increasing the number of professional degree students, and improving the human resources management level of small and medium-sized enterprises.

1.4 满意度波动较大的方面

Aspects with large fluctuations in satisfaction

1.4.1 资源供应

Supply of resources

► 能源 Energy

在电力供应方面，2022年受访企业满意度为83%，较2021年下降12%。受访企业反馈不满意的主要原因有：夏季干旱，限电无预警；电力供应量不足、稳定性差，影响企业正常生产。

In terms of power supply, the satisfaction of enterprises surveyed in 2022 was 83%, down 12% from 2021. The main reasons for the unsatisfactory feedback from the enterprises interviewed are: drought in summer, power limitation without warning, insufficient power supply and poor stability, which affect the normal production of enterprises.

在能源成本（电力、水、天然气）方面，47%受访企业认为能源成本较上一年度升高，该比例较2021年上升29%。受访企业认为造成能源成本显著上升的主要原因为能源的市场价格上涨（占比39%）。

In terms of energy costs (electricity, water, natural gas), 47% of the companies surveyed believed that energy costs were higher than the previous year, up 29% from 2021. Respondents believed that the main reason for the significant increase in energy costs was the rise in market prices of energy (39%).

在企业管控能源成本遇到的问题方面，受访企业选择最多的为管控费用高且难度大（占比27%，较2021年上升4%），其次为行业垄断（占比24%，较2021年上升6%）和新能源设备技术成本太高或发展不成熟（占比18%，较2021年上升2%）。

In terms of the problems encountered by enterprises in controlling energy costs, the enterprises surveyed chose the high cost and difficulty of controlling energy costs (27%, up 4% from 2021), followed by industry monopoly (24%, up 6% from 2021) and the high cost or immature development of new energy equipment technology (18%, up 2% from 2021).

安永建议 Ernst & Young recommends

有关部门应形成良好的能源预警机制，打通信息传递渠道，建立片区资源共享群等，及时高效向企业反馈信息，保障能源供给；加大行业反垄断力度，降低能源行业门槛，引入市场化竞争，控制能源价格。

Relevant departments should form a good energy early warning mechanism, open up information transmission channels, establish regional resource sharing groups, timely and efficient feedback to enterprises to ensure energy supply; increase industry anti-monopoly efforts, reduce the threshold of the energy industry, introduce market competition, and control energy prices.

1.4 满意度波动较大的方面

Aspects with large fluctuations in satisfaction

1.4.1 资源供应

Supply of resources

► 用地 Land use

2022年用地满意度整体有所下降，其中，土地供应、厂房供应、写字楼供应满意度较2021年分别下降4%、4%和3%。受访企业反馈不满意的主要原因有供地资源数量少、价格高。

In 2022, the overall satisfaction of land use declined, among which the satisfaction of land supply, factory supply and office supply decreased by 4%, 4% and 3% respectively compared with 2021. The main reasons for the unsatisfactory feedback from the enterprises interviewed are the small amount of land supply resources and the high price.

安永建议 Ernst & Young recommends

有关部门应合理规划产业用地，挖掘闲置及荒废土地资源，改造建设产业园区，打造高质产业集群，为企业提供优质低价供地资源；出台相关用地优惠政策，引导企业规范化用地。

Relevant departments should rationally plan industrial land, excavate idle and waste land resources, transform and construct industrial parks, build high-quality industrial clusters, provide high-quality and low-cost land resources for enterprises, and introduce relevant preferential policies to guide enterprises to standardize land use.

1.4.2 税费负担

Tax burden

在减税降费政策效果方面，认为减税降费政策对企业税负影响不明显和影响一般的受访企业比例较2021年上升10%。针对当前税收优惠政策存在的问题，受访企业选择最多的为难以达到享受优惠政策的标准（占比54%，与2021持平），其次为政策宣传力度不足（占比28%，较2021年上升6%）。

In terms of the effect of the tax reduction and fee reduction policy, the proportion of enterprises surveyed who believed that the tax reduction and fee reduction policy had no obvious impact on the tax burden of enterprises and had a general impact increased by 10% compared with 2021. In view of the problems existing in the current preferential tax policies, the enterprises surveyed chose the most difficult to meet the criteria for enjoying preferential policies (accounting for 54%, the same as 2021), followed by insufficient policy publicity (accounting for 28%, up 6% from 2021).

安永建议 Ernst & Young recommends

有关部门应线上线下工作相结合，建立线上信息群及线下培训会，打通信息渠道，加大相关税收优惠政策的宣传力度，及时传达优惠政策，拓宽信息反馈渠道，及时了解企业需求及困惑，有针对性地进行税收方面的解答辅导。

Relevant departments should combine online and offline work, establish online information groups and offline training sessions, open up information channels, increase the publicity of relevant tax preferential policies, timely convey preferential policies, broaden information feedback channels, timely understand the needs and confusions of enterprises, and provide targeted tax guidance.

1.4 满意度波动较大的方面

Aspects with large fluctuations in satisfaction

1.4.3 人力资源

Human resources

在人工成本方面，认为人工成本较上一年度升高的受访企业占比为50%，该比例较2021年上升4%。受访企业认为显著上升的人工成本主要为工资（占比29%，较2021年上升1%）和社保（占比25%，较2021年上升5%）。

In terms of labor costs, 50% of the respondents believed that labor costs were higher than the previous year, which was 4% higher than 2021. Respondents believed that the main labor costs that increased significantly were wages (29%) and social security (25%).

在员工离职比例方面，仅10%受访企业表示2022年比例较2021年升高，该比例较2021年下降10%。

In terms of the proportion of employee turnover, only 10% of the enterprises surveyed said that the proportion in 2022 was higher than that in 2021.

安永建议 Ernst & Young recommends

有关部门应大力发展人才政策，在医疗、教育、住房等方面，给予人才优惠，让人才来得了，留得住；与高校、企业联合搭建人才平台，在春招、秋招等关键节点，加大用工信息宣传力度，扩大服务辐射面，引入高质量人才。

Relevant departments should vigorously develop talent policies, give preferential treatment to talents in medical treatment, education, and other aspects, so that talents can come and stay; jointly build a talent platform with universities and enterprises, increase the publicity of employment information at key points such as spring and autumn recruitment, expand the service radiation, and introduce high-quality talents.

1.4.4 产业配套

Supporting industries

在产业配套方面，产业配套集中度、完整度满意度和产业配套企业管理、质量水平满意度较2021年分别下降了5%、4%。受访企业反馈不满意的主要原因有：部分产业配套较少，相关产业配套缺乏官方指引，缺乏高精尖工艺，高端材料技艺仍需从外地引进。

In terms of industrial support, industrial support concentration, integrity satisfaction and industrial support enterprise management, quality level satisfaction decreased by 5% and 4% respectively compared with 2021. The main reasons for the unsatisfactory are as follows: lack of sophisticated technology, and high-end material technology still needs to be introduced from other places.

安永建议 Ernst & Young recommends

重庆应引入高精尖工艺，定期开展企业培训，帮扶企业形成自主学习、自主创新的习惯及能力；学习沿海地区先进产业配套经验，推动区域内更高层次产业链式合作；围绕重庆资源禀赋和产业特色，打造全国具有竞争力的特色优势产业集聚园。

Chongqing should introduce sophisticated technology, regularly carry out enterprise training, help enterprises to form the habit and ability of independent learning and innovation, learn from the supporting experience of advanced industries in coastal areas, and build a national competitive industrial agglomeration park around Chongqing's resource endowment and industrial characteristics.

1.4 满意度波动较大的方面

Aspects with large fluctuations in satisfaction

1.4.5 物流配套

Logistics support

在物流方面，受访企业对物流的成本满意度最低，为85%，较2021年下降2%；其次为重庆市内交通的基础建设和便利性，满意度为88%，较2021年下降4%。受访企业反馈不满意的主要原因有：重庆疫情封控导致物流受阻，影响物流时效和成本；油价上升等情况导致运输成本上升；企业周边配套物流中心建设有待完善；国际货运成本过高。

In terms of logistics, the enterprises surveyed had the lowest satisfaction with the logistics cost, which was 85%, down 2% from 2021; followed by the infrastructure and convenience of transportation in Chongqing, which was 88%, down 4% from 2021. The main reasons for the dissatisfaction of the interviewed enterprises are as follows: the epidemic situation in Chongqing has blocked the logistics, affecting the timeliness and cost of logistics; the rise in oil prices has led to the rise in transportation costs; the construction of supporting logistics centers around enterprises needs to be improved; and the cost of international freight is too high.

安永建议 Ernst & Young recommends

有关部门应出台政策激励物流行业复苏，建设配套物流示范中心，以点带面逐渐辐射全市；招聘物流管理人才，分析规划重庆物流发展情况，有针对性帮扶物流行业。

Relevant departments should issue policies to encourage the recovery of the logistics industry, build supporting logistics demonstration centers, gradually radiate the whole city from point to area, recruit logistics management personnel, analyze and plan the development of Chongqing logistics, and help the logistics industry in a targeted manner.

1.5 受访企业经营情况

Operation of the enterprises interviewed

2022年受访企业经营情况不容乐观。在经营难易程度方面，57%受访企业认为较前一年度更为困难，该比例较2021年上升21%；在营业额增减情况方面，42%受访企业表示营业额较前一年度下降或大幅下降，该比例较2021年上升16%；在息税前收益增减情况方面，37%受访企业表示息税前收益呈现负增长，该比例较2021年上升14%。

The business situation of the enterprises interviewed in 2022 is not optimistic. In terms of the difficulty of operation, 57% of the enterprises surveyed thought that it was more difficult than the previous year, and the proportion increased by 21% compared with 2021. In terms of the increase and decrease of turnover, 42% of the enterprises surveyed said that the turnover decreased or decreased significantly compared with the previous year, and the proportion increased by 16% compared with 2021; In terms of the increase and decrease of earnings before interest and tax, 37% of the respondents said that earnings before interest and tax showed negative growth, which was 14% higher than in 2021.

尽管部分受访企业反映受疫情、高温干旱等多重负面因素的影响，其经营情况面临挑战，经营状况恢复受阻。但可以注意到，在二次疫情冲击之下，部分经营情况指标与2020年初次疫情爆发时相比有所改善。例如，表示营业额较前一年度增长的受访企业占比较2020年上升4%，一定程度说明重庆正形成更为完备的突发事件应对机制，企业和社会抗风险能力进一步提升，企业经营情况在波动中稳步向好。

Although some of the enterprises interviewed reflected the impact of multiple negative factors such as the epidemic, high temperature and drought, their business situation was facing challenges and the recovery of business conditions was hindered. However, it can be noted that under the impact of the second epidemic, some business indicators have improved compared with the first outbreak in 2020. For example, the proportion of enterprises surveyed that said their turnover increased by 4% compared with the previous year increased by 4% compared with 2020. To a certain extent, it shows that Chongqing is forming a more complete emergency response mechanism, the ability of enterprises and society to resist risks is further improved, and the business situation of enterprises is steadily improving in fluctuations.

在受访企业在重庆生产经营面临的主要挑战方面，受访企业选择最多的挑战为全球新冠疫情冲击（26%），其次为原材料成本上升（13%）、中国经济增速放缓（10%）、劳动力成本提高（10%）。而对未来两年在重庆发展前景的预期，50%受访企业表示乐观（较2021年下降10%），而有13%受访企业表示悲观。

In terms of the main challenges faced by the enterprises surveyed in Chongqing's production and operation, the most frequently chosen challenges were the impact of the global COVID-19 epidemic (26%), followed by rising raw material costs (13%), slowing China economic growth (10%) and rising labor costs (10%). As for the development prospects of Chongqing in the next two years, 50% of the enterprises surveyed expressed optimism (down 10% from 2021), while 13% of the enterprises surveyed expressed pessimism.

1.5 受访企业经营情况

Operation of the enterprises interviewed

安永建议 Ernst & Young recommends

2022年疫情放开后，恢复生产经营秩序，激发市场活力，恢复和振奋企业信心将时重点工作。安永建议：

After the release of the epidemic in 2022, it will be a key task to restore the order of production and operation, stimulate the vitality of the market, and restore and boost the confidence of enterprises. Ernst & Young recommends:

► 发展经济内循环

Develop the internal circulation of economy

重庆作为西部地区经济内循环中心，保障好经济内循环应挖掘发挥本地产业特色，延伸、延展产业链，促进一、二、三产业融合，提高产业创新意识，掌握核心技术，提高市场竞争力，减少对国外企业的依赖程度。

Chongqing, as the center of economic internal circulation in the western region, should tap the local industrial characteristics, extend the industrial chain, promote the integration of primary, secondary and tertiary industries, improve the awareness of industrial innovation, master the core technology, improve market competitiveness and reduce the dependence on foreign enterprises to ensure the economic internal circulation.

► 做好疫情后经济复苏准备

Prepare for economic recovery after the epidemic

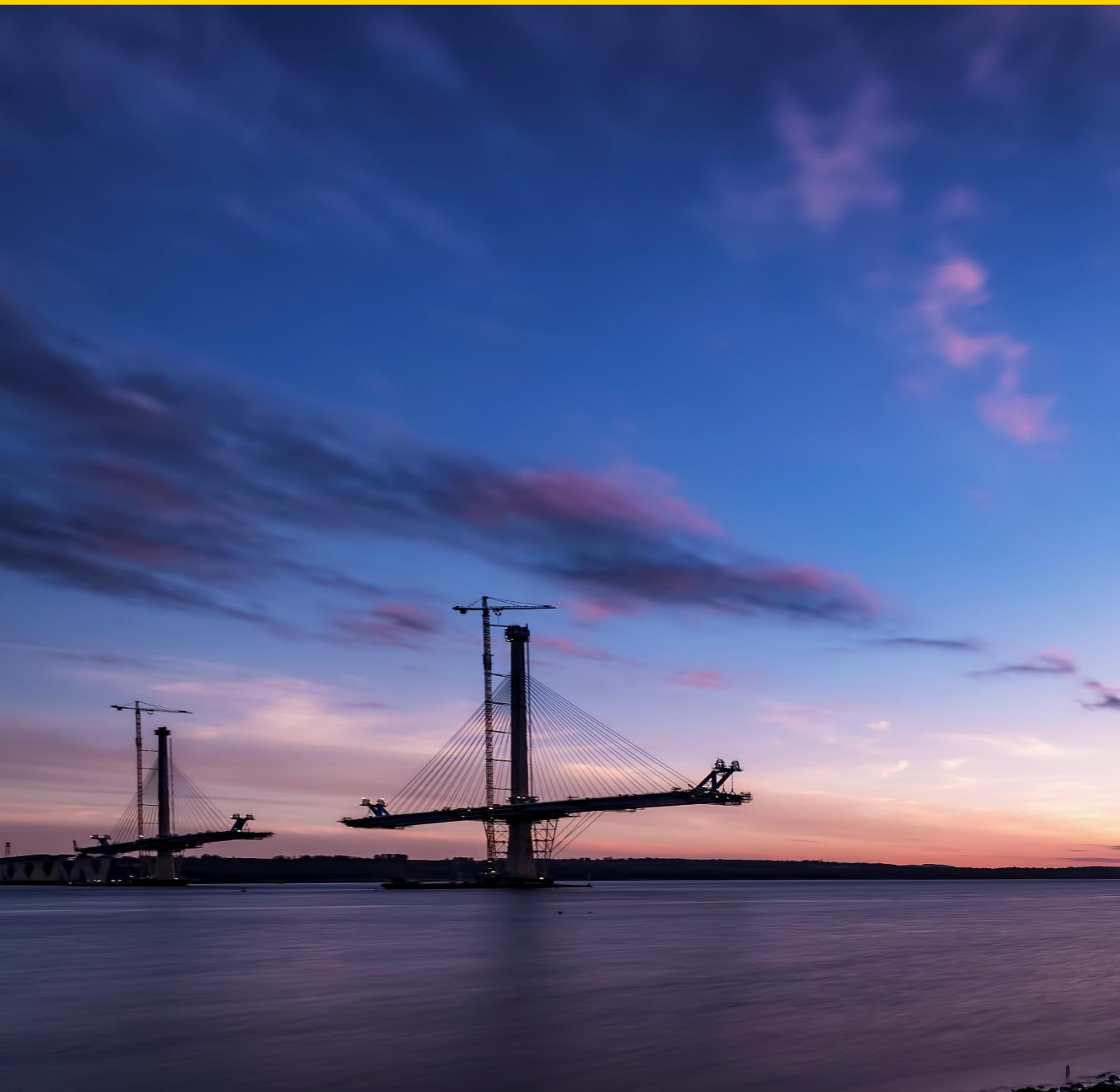
在疫情开放后，经济逐渐复苏，应针对性出台各行业优惠政策，刺激需求产生，做好疫情后经济复苏准备。加强基础设施建设，提供政策支持和资金补贴，加强职业培训和积极创造就业机会已然成为各国、各地区疫情后经济复苏的主要措施，这些措施对重庆依然有借鉴意义。基础设施建设包括交通设施、生活设施、生产设施、安全设施的建设等，政府应着力挖掘改造难点、痛点，了解企业真实诉求，建设服务于企业的设施设备群；资金支持为经济复苏提供支持，发放优惠券等为群众提供消费动力，促进经济复苏；提高劳动力素质，是降低劳动力成本的重要方法，通过对企业员工培训等方法提高原有劳动力素质，助力经济复苏。

After the opening of the epidemic and the gradual recovery of the economy, preferential policies for various industries should be introduced to stimulate demand and prepare for economic recovery after the epidemic. Strengthening infrastructure construction, providing policy support and financial subsidies, strengthening vocational training and actively creating employment opportunities have become the main measures for economic recovery in various countries and regions after the epidemic. Infrastructure construction includes the construction of transportation facilities, living facilities, production facilities, safety facilities, etc. The government should focus on exploring the difficulties and pain points of transformation, understand the real demands of enterprises, and build facilities and equipment groups serving enterprises. Financial support provides support for economic recovery, and coupons provide consumption power for the masses to promote economic recovery; Improving the quality of labor force is an important way to reduce labor costs, through the training of employees and other methods to improve the quality of the original labor force, to help economic recovery.

2

重庆市外商投资企业投资环境专项问卷调查结果分析

Analysis of the results of the special questionnaire survey on the investment environment of foreign-invested enterprises in Chongqing



概述 Overview

- ▶ 本系列报告每年选取一些特色板块作为专项调查的主体。《2022年测评报告》对“服务业扩大开放”及“重庆承接国际和东部产业转移”情况进行了调查。

In this series of reports, some characteristic sections are selected as the main body of special investigation every year. The 2022 Evaluation Report investigates the situation of "expanding the opening of service industry" and "Chongqing undertaking international and eastern industrial transfer".

- ▶ 通过分析收回的416份完成问卷，《2022年测评报告》对如下主题进行了专项测评：

By analyzing the 416 completed questionnaires collected, the 2022 Evaluation Report conducted a special evaluation on the following topics:

- ▶ **服务业扩大开放专题分析**

Expanding the opening of service industry

- ▶ 受访企业对重庆市服务业扩大开放的了解和感受
The understanding and feelings of the enterprises interviewed on the opening up of Chongqing's service industry
- ▶ 受访企业对重庆市服务业扩大开放的看法
Views of the enterprises interviewed on the opening up of Chongqing's service industry
- ▶ 建议和总结
Suggestions and summary

- ▶ **重庆承接国际和东部产业转移专题分析**

Chongqing undertaking international and eastern industrial transfer

- ▶ 受访企业对重庆承接产业转移的体验
The experience of the enterprises interviewed in undertaking industrial transfer in Chongqing
- ▶ 受访企业对重庆承接产业转移的SWOT分析
The SWOT Analysis of the Interviewees on Chongqing's Undertaking of Industrial Transfer
- ▶ 三项优势产业分析
Analysis of Three Advantageous Industries
- ▶ 建议和总结
Suggestions and summary



概述 Overview

服务业扩大开放对重庆具有重要意义，既是持续扩大对外开放的重要部署，也是当前通过开放稳外资的重大举措。从需求结构升级和需求体系培育看，服务业双向开放释放出的投资机会推动投资主体多样化。从技术经济关联和产业融合创新视角看，服务业开放带来了服务种类多样化和专业化服务质量提升。加快服务业扩大开放是新形势下塑造国际竞争和合作新优势的重要途径，以开放促改革、促创新，有助于提升重庆市服务业的国际市场竞争力。

Expanding the opening up of service industry is of great significance to Chongqing, which is not only an important deployment to continuously expand the opening up, but also a major measure to stabilize foreign investment through opening up. From the perspective of demand structure upgrading and demand system cultivation, the investment opportunities released by the two-way opening of service industry promote the diversification of investment subjects. From the perspective of technological and economic linkages and industrial integration and innovation, the opening of service industry has brought about diversification of service types and improvement of professional service quality. Speeding up the opening up of service industry is an important way to shape new advantages of international competition and cooperation under the new situation. Promoting reform and innovation through opening up will help to enhance the competitiveness of Chongqing's service industry in the international market.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.1 受访企业对重庆市服务业扩大开放的了解和感受

The understanding and feelings of the enterprises interviewed on the opening up of Chongqing's service industry

- ▶ 重庆市服务业扩大开放拥有坚实的基础，开放体系正不断完善。例如，2022年重庆发布了《重庆市服务业扩大开放综合试点首批重点任务清单》和《重庆市服务业扩大开放综合试点首批重点项目清单》，部署27项重点任务和24个重点项目，涉及科技、教育、商贸文旅、医疗健康、金融、人才、数据、法治保障、投资便利与物流通关等诸多领域，着力打造内陆现代服务业发展先行区。

Chongqing's service industry has a solid foundation for expanding its opening up, and the opening system is constantly improving. For example, in 2022, Chongqing issued the List of the First Key Tasks for the Comprehensive Pilot Project of Expanding and Opening the Service Industry in Chongqing and the List of the First Key Projects for the Comprehensive Pilot Project of Expanding and Opening the Service Industry in Chongqing, and deployed 27 key tasks and 24 key projects. It covers many fields, such as science and technology, education, business, culture and tourism, health care, finance, talent, data, legal protection, investment facilitation and logistics customs clearance, and strives to build a pioneer area for the development of inland modern service industry.

- ▶ 随着政策宣传力度成效不断显现，大部分受访企业表示了解重庆市服务业扩大开放相关信息，这一比例达到了68%。尽管有25%受访企业表示虽不了解，但希望获取相关信息。但有7%受访企业表示不了解也无兴趣，这部分企业主要属于制造业。

With the effectiveness of policy publicity, most of the enterprises surveyed said they knew about the opening up of Chongqing's service industry, which reached 68%. Although 25% of the enterprises surveyed said they did not know, they wanted to get relevant information. However, 7% of the enterprises surveyed said they did not understand or were not interested, and these enterprises mainly belong to the manufacturing industry.

2.1 服务业扩大开放专题分析

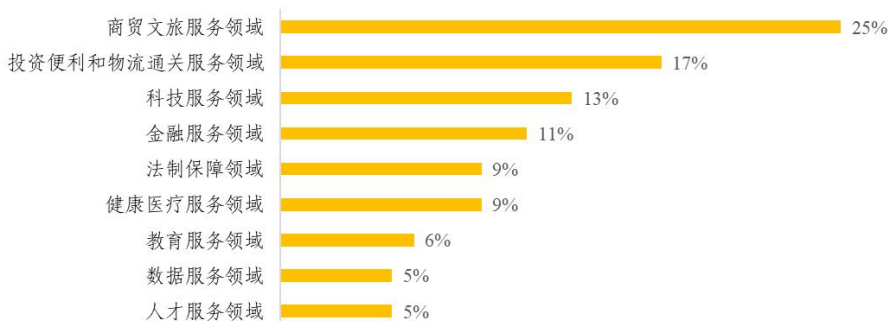
Expanding the opening of service industry

2.1.1 受访企业对重庆市服务业扩大开放的了解和感受

The understanding and feelings of the enterprises interviewed on the opening up of Chongqing's service industry

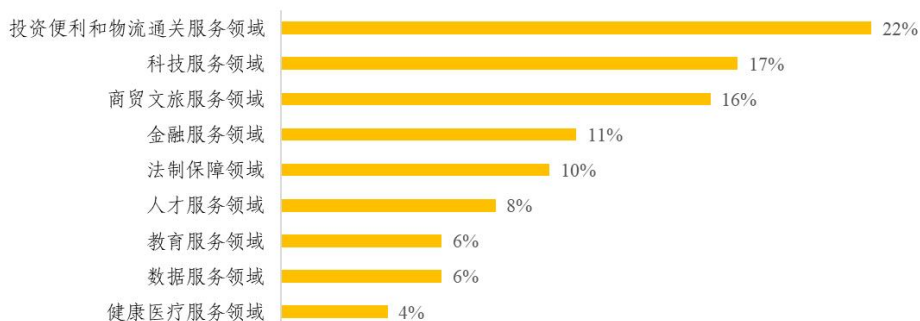
- 在重庆市九个服务业领域中，受访企业认为重庆位于领先水平的三个领域为：商贸文旅服务、投资便利和物流通关服务、科技服务，占比分别为25%、17%、13%。但教育服务、数据服务、人才服务排名垫底，占比分别为6%、5%、5%。各领域排名情况如下：

Among the nine service sectors in Chongqing, the enterprises surveyed believed that Chongqing was in the leading position in three areas: business, cultural and tourism services, investment facilitation and logistics customs clearance services, and science and technology services, accounting for 25%, 17% and 13% respectively. However, education services, data services and talent services ranked the bottom, accounting for 6%, 5% and 5% respectively. The ranking of each field is as follows:



- 根据调查结果，受访企业从其扩大开放中受益最多的三个领域为：投资便利和物流通关服务领域、科技服务领域、商贸文旅服务领域，占比分别为22%、17%、16%。但教育服务、数据服务、健康医疗服务排名垫底，占比分别为6%、6%、4%。各领域排名情况如下：

According to the results of the survey, the three areas that the enterprises surveyed benefited the most from the expansion of opening up were: investment facilitation and logistics customs clearance services, science and technology services, and business, cultural and tourism services, accounting for 22%, 17% and 16% respectively. However, education services, data services and health care services ranked the bottom, accounting for 6%, 6% and 4% respectively. The ranking of each field is as follows:





安永认为，在上述两个调查中，投资便利和物流通关服务领域均排名靠前，说明重庆在交通物流领域不仅基础设施完善且服务质量领先全国，值得肯定。但数据服务领域均排名靠后，需要加强或破局。当下是大数据时代，重庆可着力引进全国乃至世界领先数据企业，强化高校大数据专业学科建设，形成西部智能高地。

Ernst & Young believes that in the above two surveys, investment facilitation and logistics customs clearance services rank high, indicating that Chongqing not only has perfect infrastructure but also leads the country in the field of transportation and logistics, which is worthy of affirmation. However, the data service sector ranks low and needs to be strengthened or broken. At present, in the era of big data, Chongqing can focus on introducing leading data enterprises in the whole country and even in the world, strengthening the discipline construction of big data specialty in universities, and forming an intelligent highland in the west.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.2 受访企业对重庆市服务业扩大开放的看法

Views of the enterprises interviewed on the opening up of Chongqing's service industry

(1) 各领域扩大开放进程中亟待改善的问题

Problems that need to be improved urgently in the process of opening wider to the outside world in various fields

- ▶ **科技服务领域:** 针对重庆在科技服务领域扩大开放进程中亟待改善的问题, 受访企业选择最多的为高端科技人才偏少(占比27%), 其次为科学技术服务产业链待健全, 周边产业配套有待丰富(占比20%)、人才奖励力度弱, 无个人所得税优势(占比20%)。此外, 受访企业反映的问题还包括: 科学技术相关服务产业规模偏小, 规模效应不明显; 技术合同登记和备案流程待加速, 容缺机制待优化; 知识产权保护能力不高, 相关保护监管制度有待完善等。

Science and technology services: In view of the problems that need to be improved urgently in the process of expanding the opening up of Chongqing in the field of science and technology services, the enterprises surveyed chose the least high-end scientific and technological talents (accounting for 27%), followed by the science and technology service industry chain to be improved, the surrounding industries to be enriched (accounting for 20%), the weak incentives for talents, and no personal income tax advantage (accounting for 20%). In addition, the problems reflected by the interviewed enterprises include: the scale of science and technology related service industry is small, the scale effect is not obvious, the tolerance mechanism needs to be optimized; the ability of intellectual property protection is not high, and the relevant protection and supervision system needs to be improved.

- ▶ **商贸文旅服务领域:** 针对重庆在商贸文旅服务领域扩大开放进程中亟待改善的问题, 受访企业选择最多的为受疫情反复影响, 旅游发展不稳定, 市场消费热情低迷(占比40%), 其次为跨境贸易政策复杂, 企业对海关、外管、税局、银行政策把握不准(占比20%)。此外, 受访企业反映的问题还包括: 缺乏熟悉跨境贸易、电子商务的人才; 文化设施配套欠缺, 部分硬件更新缓慢; 未充分利用主城区的辐射带动能力, 周边区县开发不完善等。

Business, culture and tourism services: In view of the problems that need to be improved urgently in the process of expanding the opening up of Chongqing in the field of business, culture and tourism services, the enterprises interviewed chose the most as the repeated impact of the epidemic, the unstable development of tourism, and the low enthusiasm for market consumption (accounting for 40%), followed by the complex cross-border trade policies, and the enterprises' inaccurate grasp of the policies of customs, foreign management, tax bureaus and banks (accounting for 20%). In addition, the problems reflected by the enterprises interviewed include: lack of talents familiar with cross-border trade and e-commerce; lack of supporting cultural facilities, slow updating of some hardware; inadequate use of the radiation driving capacity of the main urban area, imperfect development of surrounding districts and counties, etc.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.2 受访企业对重庆市服务业扩大开放的看法

Views of the enterprises interviewed on the opening up of Chongqing's service industry

(1) 各领域扩大开放进程中亟待改善的问题

Problems that need to be improved urgently in the process of opening wider to the outside world in various fields

- ▶ **金融服务领域：**针对重庆在金融服务领域扩大开放进程中亟待改善的问题，受访企业选择最多的为部分行业融资困难（占比33%），其次为金融产品创新不足，金融产品品类有待丰富（占比15%）。此外，受访企业反映的问题还包括：跨境融资灵活性较低，企业从境外渠道融资存在较多限制；结售汇业务办理效率待改善；外资企业融资存在隐性门槛等。

Financial services: In view of the problems that need to be improved urgently in the process of expanding the opening up of financial services in Chongqing, the enterprises surveyed chose the most as the financing difficulties of some industries (accounting for 33%), followed by the lack of innovation in financial products and the need to enrich the categories of financial products (accounting for 15%). In addition, the problems reflected by the enterprises interviewed also include: low flexibility of cross-border financing, more restrictions on enterprises financing from overseas channels; the efficiency of settlement and sale of foreign exchange business needs to be improved; there is a hidden threshold for financing of foreign-funded enterprises.

- ▶ **教育服务领域：**针对重庆在教育服务领域扩大开放进程中亟待改善的问题，受访企业选择最多的为线上教育的基础设施建设有待提升，线上教学质量评估制度有待完善（占比31%），其次为高校国际化交流合作有待提高，尤其是应用型学科类高校（占比24%）。此外，受访企业反映的问题还包括：普通中小学接收企业的外籍人士子女就读能力较弱；幼托体系不健全，缺乏专业机构；国际考试机构及理工类国际教材的引入进程缓慢，教程国际化程度低等。

Education service sector: In view of the problems that need to be improved urgently in the process of expanding the opening up of Chongqing in the field of education service, the most popular choice of the enterprises surveyed is that the infrastructure construction of online education needs to be improved, the online teaching quality evaluation system needs to be improved (accounting for 31%), followed by the international exchange and cooperation of universities needs to be improved, especially the application-oriented universities (accounting for 24%). In addition, the problems reflected by the enterprises interviewed also include: the weak ability of the children of foreigners in the receiving enterprises of ordinary primary and secondary schools to study; the imperfect kindergarten system and the lack of professional institutions; the slow process of introducing international examination institutions and international teaching materials for science and engineering, and the low degree of internationalization of the curriculum.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.2 受访企业对重庆市服务业扩大开放的看法

Views of the enterprises interviewed on the opening up of Chongqing's service industry

(1) 各领域扩大开放进程中亟待改善的问题

Problems that need to be improved urgently in the process of opening wider to the outside world in various fields

- ▶ **健康医疗服务领域：**针对重庆在健康医疗服务领域扩大开放进程中亟待改善的问题，受访企业选择最多的为新兴互联网医疗体系有待健全，相关监管评估制度有待完善（占比26%），其次为健康医疗服务人才紧缺，用人成本居高不下（占比24%）。此外，受访企业反映的问题还包括：健康医疗服务企业管理经营模式固化，创新能力不足；健康医疗服务领域准入要求严格，审批程序冗杂，尤其是对营利性医疗机构；健康医疗领域品牌效应明显，新晋企业市场拓展难度大；健康医疗企业股权比例在实操过程中仍存在隐形限制等。

Health care services: In view of the problems that need to be improved urgently in the process of expanding the opening up of health care services in Chongqing, the enterprises surveyed chose the emerging Internet medical system to be improved, and the relevant regulatory evaluation system to be improved (accounting for 26%), followed by the shortage of health care service personnel and the high cost of employment (accounting for 24%). In addition, the problems reflected by the interviewed enterprises include: the management and operation mode of health care service enterprises is solidified, and the innovation ability is insufficient; the access requirements in the field of health care service are strict, and the approval procedures are complicated; the brand effect in the field of health care is obvious, and it is difficult for new enterprises to expand the market; There are still invisible restrictions on the equity ratio of health care enterprises in the process of practice.

- ▶ **数据服务领域：**针对数据服务领域扩大开放进程中亟待改善的问题，受访企业选择最多的为数据统筹力度较弱，数据开放和共享制度尚不成熟（占比23%），其次为数据保护制度不健全，数据安全保障度不够高（占比21%）。此外，受访企业反映的问题还包括：数据交易规则不明确，数据标准化、资产化和商品化的交易体系有待完善；数据监管的力度有待提升；大数据市场的进入壁垒较高，大数据机构设置和职能范围不明确等。

Data service sector: In view of the problems that need to be improved urgently in the process of expanding the opening up of the data service sector, the enterprises surveyed chose the most as weak data co-ordination, immature data opening and sharing system (accounting for 23%), followed by imperfect data protection system and insufficient data security (accounting for 21%). In addition, the problems reflected by the interviewed enterprises include: unclear data trading rules, data standardization, capitalization and commercialization trading system to be improved; data supervision needs to be improved; high barriers to entry into the big data market, unclear institutional settings and functions of big data, etc.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.2 受访企业对重庆市服务业扩大开放的看法

Views of the enterprises interviewed on the opening up of Chongqing's service industry

(1) 各领域扩大开放进程中亟待改善的问题

Problems that need to be improved urgently in the process of opening wider to the outside world in various fields

- ▶ **人才服务领域：**针对重庆在人才服务领域扩大开放进程中亟待改善的问题，受访企业选择最多的为重庆市对人才在渝的服务、奖励、扶持措施较少（占比34%），其次为人力资源市场体系有待健全，人才市场供求、价格和竞争机制有待完善（占比30%）。此外，受访企业反映的问题还包括：人才及家属的生活保障力度较低；境外人才出入境不够便利；劳动人事争议的处理效能与处理机制有待加强等。

Talent service field: In view of the problems that need to be improved urgently in the process of expanding the opening up of Chongqing in the field of talent service, the enterprises surveyed chose the most as Chongqing's less service, reward and support measures for talents in Chongqing (accounting for 34%), followed by the human resources market system to be improved, and the supply and demand, price and competition mechanism of the talent market to be improved (accounting for 30%). In addition, the problems reflected by the interviewed enterprises also include: the living security of talents and their families is low; the entry and exit of overseas talents is not convenient enough; the efficiency and mechanism of handling labor and personnel disputes need to be strengthened.

- ▶ **投资便利和物流通关服务领域：**针对重庆在投资便利和物流通关服务领域扩大开放进程中亟待改善的问题，受访企业选择最多的为不同运输方式在市场开放和准入等方面的规则不同，需加强协同（占比35%），其次为物流航线、口岸服务不够完善，货物通关及运输效率受限（占比27%）。此外，受访企业反映的问题还包括：海关、外管、税局、银行数据对接不完善，需加强协同；外汇管制执行口径不透明等。

Investment facilitation and logistics customs clearance services: In view of the problems that need to be improved urgently in the process of expanding the opening up of Chongqing in the field of investment facilitation and logistics customs clearance services, the enterprises surveyed most chose different modes of transport with different rules in terms of market opening and access, which need to strengthen coordination (accounting for 35%), followed by logistics routes and port services. The efficiency of customs clearance and transportation of goods is limited (27%). In addition, the problems reflected by the enterprises interviewed also include: the data docking of customs, foreign exchange control, tax Bureau and bank is not perfect, and coordination needs to be strengthened; the implementation caliber of foreign exchange control is not transparent.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.2 受访企业对重庆市服务业扩大开放的看法

Views of the enterprises interviewed on the opening up of Chongqing's service industry

(1) 各领域扩大开放进程中亟待改善的问题

Problems that need to be improved urgently in the process of opening wider to the outside world in various fields

- ▶ **法制保障领域：**针对重庆在法制保障领域扩大开放进程中亟待改善的问题，受访企业选择最多的为社会整体法治意识有待提高（占比43%），其次为营商法治体系建设不够完善，财产和知识产权保护制度等配套政策有待加强（占比22%）。受访企业反映的问题还包括：监管部门职责分工模糊，有待打造透明、规范的监管体系；存在执法不严或久拖不决、久结未执等问题，司法服务理念和服务能力有待提高等。

Legal protection: In view of the problems that need to be improved urgently in the process of expanding the opening up of Chongqing in the field of legal protection, the enterprises surveyed chose the most as the overall awareness of the rule of law in society needs to be improved (accounting for 43%), followed by the imperfect construction of the business legal system, and the supporting policies such as the property and intellectual property protection system need to be strengthened (accounting for 22%). The problems reflected by the enterprises interviewed also include: the division of responsibilities of the regulatory authorities is vague, and a transparent and standardized regulatory system needs to be built; there are problems such as lax law enforcement or protracted, and the judicial service concept and service ability need to be improved.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.2 受访企业对重庆市服务业扩大开放的看法

Views of the enterprises interviewed on the opening up of Chongqing's service industry

(2) 与沿海城市相比的优劣势

Advantages and disadvantages compared with coastal cities

随着沿海开发战略逐步深化，我国沿海地区转型升级步伐加快，总体呈现快速发展期趋势。重庆借鉴沿海城市发展经验，聚焦打造现代服务业发展先行区目标，以任务落实、制度创新、项目落地为抓手，开展服务业扩大开放综合试点的一系列实践与探索。

With the gradual deepening of the coastal development strategy, the pace of transformation and upgrading of China's coastal areas is accelerating, showing a trend of rapid development in general. Drawing on the development experience of coastal cities, Chongqing focuses on the goal of building a pioneer area for the development of modern service industry, and carries out a series of practices and explorations in the comprehensive pilot project of expanding the opening up of service industry with the implementation of tasks, system innovation and project landing as the starting point.

根据调查结果，受访企业认为与沿海城市相比，重庆市在服务业扩大开放方面有如下优势：劳动力成本相对低廉，劳动力资源相对更加充足；拥有水陆空三型交通枢纽，综合配套能力强，交通便利；地理面积广阔，自然资源丰富，在商贸文旅方面存在优势；作为直辖市、成渝双城经济圈的核心城市，汇集多项优惠政策。

According to the results of the survey, the enterprises interviewed believe that compared with the coastal cities, Chongqing has the following advantages in expanding the opening up of the service industry: relatively low labor costs and relatively more abundant labor resources; it has a three-type transportation hub of water, land and air, with strong comprehensive supporting capacity and convenient transportation; it has a vast geographical area and abundant natural resources, with advantages in business, culture and tourism; As a municipality directly under the Central Government and the core city of Chengdu-Chongqing Shuangcheng Economic Circle, it gathers a number of preferential policies.

但受访企业认为与沿海城市相比，重庆市有如下劣势：在服务业扩大开放方面市场化程度相对较低；由于科技创新能力不足、缺乏中高级人才等因素，当前服务业产业布局不完善，产业结构尚须优化；服务业扩大开放政策较沿海城市缺乏针对性，本地化程度较低；由于政府职能部门信息共享机制不完善，服务效率和创新性亟待提高。

However, compared with the coastal cities, the enterprises interviewed believe that Chongqing has the following disadvantages: the degree of marketization in the expansion and opening of the service industry is relatively low; due to the lack of scientific and technological innovation capacity, the lack of middle and senior talents and other factors, the current layout of the service industry is not perfect, and the industrial structure needs to be optimized; the policy of expanding the opening of the service industry lacks pertinence and the degree of localization is lower than that of the coastal cities; Due to the imperfect information sharing mechanism of government functional departments, service efficiency and innovation need to be improved urgently.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.2 与其他中西部内陆城市相比的优劣势

Views of the enterprises interviewed on the opening up of Chongqing's service industry

(3) 与其他中西部内陆城市相比的优劣势

Advantages and disadvantages compared with other inland cities in the Midwest

经过多年创新探索，我国中西部内陆城市服务业总量快速增加，国际竞争力不断增强，结构不断优化。在服务业扩大开放和高质量发展方面，重庆市作为中西部地区首个试点城市，可以提供大量可复制推广的经验，有效促进中西部地区新型服务贸易发展。

After years of innovation and exploration, the total service industry of inland cities in central and western China has increased rapidly, their international competitiveness has been continuously enhanced, and their structure has been continuously optimized. As the first pilot city in the central and western regions, Chongqing can provide a lot of replicable experience and effectively promote the development of new service trade in the central and western regions.

根据调查结果，受访企业认为与其他中西部内陆城市相比，重庆市在服务业扩大开放方面有如下优势：面积广阔，独特的地理优势，自然资源丰富；作为全国重要的制造业基地，重庆市工业基础完善；国际航线建设便利，拥有较多对外口岸，产品出口通道便利；海陆空交通方式丰富，是西部最大的综合交通枢纽之一；相较其他内陆城市拥有更充沛的劳动力以及更低的人力成本；作为中西部地区首批开展服务业扩大开放综合试点省市，重庆市拥有更普惠的投资政策与更完善的基础设施配套，对中西部区域辐射能力较强，能够更好带动周边市场。

According to the results of the survey, the enterprises interviewed believe that compared with other inland cities in the central and western regions, Chongqing has the following advantages in expanding the opening up of the service industry: vast area, unique geographical advantages, rich natural resources; as an important manufacturing base in China. Compared with other inland cities, it has more abundant labor force and lower labor cost; As one of the first pilot provinces and cities in the central and western regions to expand the opening up of the service industry, Chongqing has more inclusive investment policies and better infrastructure support, which has a strong radiation capacity to the central and western regions and can better drive the surrounding markets.

根据调查结果，受访企业认为与其他中西部内陆城市相比，重庆有如下劣势：受制于山地环境等因素，重庆市在产业发展与生产布局方面受到一定约束；地域面积广阔，区域发展不平衡，中心城区与区县发展差异较大导致影响力和发达程度不如部分核心内陆城市；高校资源相对落后，人才输送动能不足，缺乏各行业中高级人才；制造业与服务业发展不均衡、产业发展缺乏规模效应。

According to the results of the survey, the enterprises interviewed believe that compared with other inland cities in the central and western regions, Chongqing has the following disadvantages: restricted by the mountainous environment and other factors, Chongqing is subject to certain constraints in industrial development and production layout; the geographical area is vast, the regional development is unbalanced, and the development difference between the central urban area and the districts and counties is large, resulting in less influence and development than some core inland cities; lack of senior talents in various industries, unbalanced development of manufacturing and service industries, lack of scale effect of industrial development.

2.1 服务业扩大开放专题分析

Expanding the opening of service industry

2.1.3 建议和总结

Suggestions and summary

本次调查中，绝大部分受访企业对重庆市服务业扩大开放工作给予了肯定，同时也针对当前问题提出了建议。

In this survey, the vast majority of enterprises interviewed affirmed the work of expanding the opening up of Chongqing's service industry, and also put forward suggestions for the current problems.

在政务服务方面，受访企业认为应持续优化政务服务态度，提高政务水平与效率，建设专业务实的干部团队，同时简化行政审批程序；在政策制定方面，受访企业认为应出台更多针对外资企业的优惠政策，给予外商更多的投资优惠，优化来渝投资门槛，同时继续加大政策宣传力度，加强实行力度；在人力资源方面，受访企业认为应加强人才引进及配套服务，加重文化教育服务，提高人才培养，增加优质人才储备；在科技创新方面，受访企业认为应加强对高新技术的扶持，坚持创新引领服务功能；在产业布局方面，受访企业认为应结合本地特点，同时借鉴沿海城市经验，考虑引进东南亚或其他国家的服务业，实现创新突破；在法制监管方面，受访企业认为应持续完善监管制度，规范市场行为，保护消费者利益，为企业提供更强力的法治保障。

In terms of government service, the enterprises interviewed believed that they should continue to optimize the attitude of government service, improve the level and efficiency of government affairs, build a professional and pragmatic cadre team, and simplify the administrative approval procedures; In terms of policy formulation, the enterprises interviewed believed that more preferential policies for foreign-funded enterprises should be introduced, more investment preferences should be given to foreign investors, the threshold for investment in Chongqing should be optimized, and policy publicity and implementation should be strengthened; In terms of human resources, the interviewed enterprises believe that they should strengthen the introduction of talents and supporting services, increase cultural and educational services, improve personnel training, and increase the reserve of high-quality talents. In terms of scientific and technological innovation, the interviewed enterprises believe that they should strengthen the support for high-tech and adhere to the innovation-led service function; In terms of industrial layout, the interviewed enterprises believed that they should combine local characteristics, learn from the experience of coastal cities, and consider introducing service industries from Southeast Asia or other countries to achieve innovative breakthroughs. In terms of legal supervision, the interviewed enterprises believed that they should continue to improve the regulatory system, standardize market behavior, protect the interests of consumers, and provide stronger legal protection for enterprises.

2.1.3 建议和总结

Suggestions and summary

重庆应结合自身特色，大力发展优势服务业，推进先进制造业和现代服务业融合发展，积累先进经验，构建优质高效的服务业新体系，深化服务业扩大开放综合试点，加快建设内陆现代服务业发展先行区，打造富有巴蜀特色的国际消费城市和世界知名文化旅游城市。同时，针对目前短板的服务业：在教育服务领域，推动产教融合、科教融合，完善线上教育基础设施，构建全面的数字教育资源体系；在数据服务领域，健全数据管理体制机制，强化数据安全保障，明确数据交易规则，逐步完善数据开放和共享制度；在人才服务领域，优化人才发展环境，加强对在渝人才的服务、奖励和扶持，同时健全人力资源市场体系，保障人才市场供求平衡与价格公平，支持企业和高校、科研机构联合培养人才，促进产业链人才链深度融合。

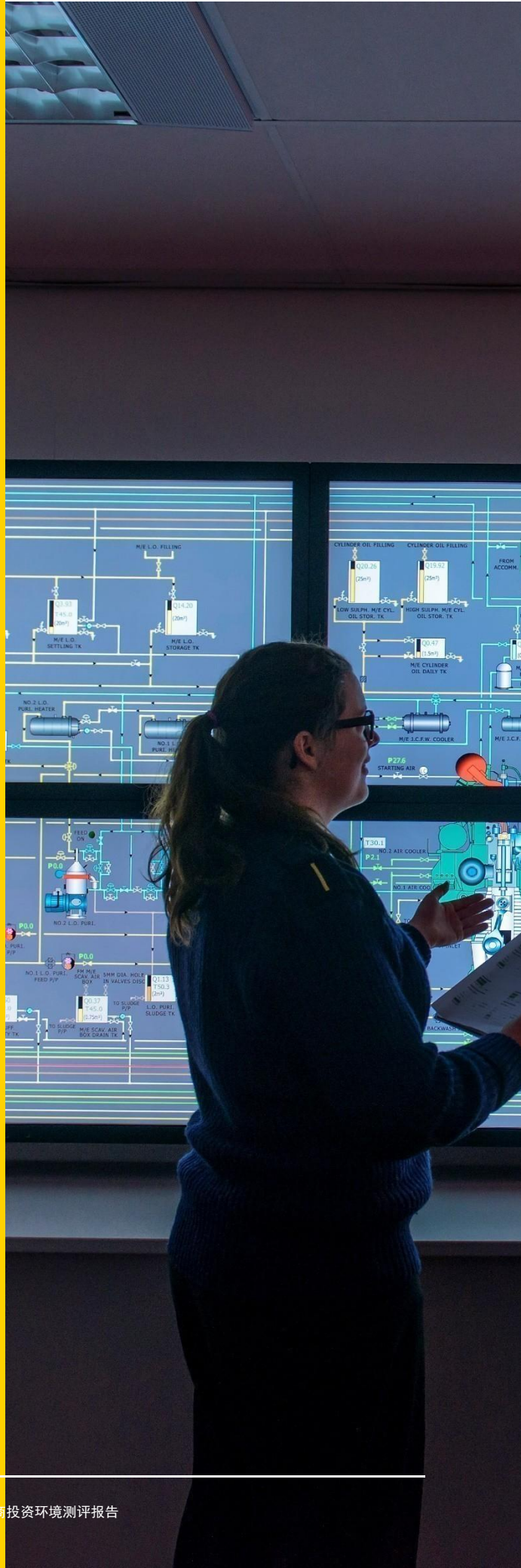
作为中西部首批入选全国服务业扩大开放综合试点的省市，重庆市正加速推动服务业扩大开放，着力打造内陆现代服务业发展先行区，为国家全方位、宽领域、深层次开放和服务业创新发展发挥示范带动作用。了解企业想法，认真听取企业的意见和建议，是推动服务业高质量发展必不可少的工作，有助于增强企业的参与感，制定更加贴切企业需求的政策，选择更适合重庆市服务业的开放路径，提升重庆市服务业的国际市场竞争力。

Chongqing should combine its own characteristics, vigorously develop superior service industry, promote the integration of advanced manufacturing industry and modern service industry, accumulate advanced experience, build a new system of high-quality and efficient service industry, deepen the comprehensive pilot project of expanding the opening of service industry. At the same time, in view of the current weak service industry, in the field of education services, we should promote the integration of industry and education, science and education, and build a comprehensive digital education resource system. In the field of data services, we should improve the data management system and mechanism, strengthen data security, clarify data trading rules, and gradually improve the data opening and sharing system.

As one of the first provinces and cities in the central and western regions to be selected as the comprehensive pilot projects for expanding the opening up of the national service industry, Chongqing is accelerating the opening up of the service industry. Understanding the ideas of enterprises is indispensable to promote the high-quality development of service industry, which helps to enhance the sense of participation of enterprises, formulate policies more appropriate to the needs of enterprises, choose an open path more suitable for Chongqing's service industry, and enhance the competitiveness of Chongqing's service industry in the international market.

2.2 重庆承接国际和东部产业转移 专题分析

Special Analysis of Chongqing's Undertaking International and Eastern Industrial Transfer



概述 Overview

产业转移是经济全球化推动下不可逆转的发展趋势，是我国工业化、信息化、城镇化、市场化、国际化深入发展的必然结果。近年来，推动国际产业和东部沿海地区产业加快向中西部地区梯度转移，形成更加合理有效的区域产业分工格局，已成为促进区域协调发展的政策取向和重要任务。重庆作为我国中西部地区唯一的直辖市、成渝双城经济圈的重要支点，基础设施逐步完善，要素成本优势日益明显，在承接国际和东部产业转移过程中扮演着越来越重要的角色。

Industrial transfer is an irreversible development trend driven by economic globalization and the inevitable result of the further development of industrialization, informatization, urbanization, marketization and internationalization in China. In recent years, promoting the gradient transfer of international industries and industries in the eastern coastal areas to the central and western regions and forming a more rational and effective regional industrial division pattern have become the policy orientation and important task of promoting regional coordinated development. As the only municipality directly under the central government in the central and western regions of China and an important fulcrum of the Chengdu-Chongqing economic circle, Chongqing has gradually improved its infrastructure and increasingly obvious advantages in factor cost, playing an increasingly important role in undertaking international and eastern industrial transfer.

2.2 重庆承接国际和东部产业转移专题分析

Special Analysis of Chongqing's Undertaking International and Eastern Industrial Transfer

2.2.1 受访企业对重庆承接产业转移的体验

The experience of the enterprises interviewed in undertaking industrial transfer in Chongqing

对于重庆承接产业转移的了解程度，75%受访企业表示对重庆承接国际和东部产业转移有不同程度的了解；18%受访企业表示不太了解，仅听说过重庆承接产业转移，但并未获取过相关资讯；仅7%受访企业表示完全不了解，从未听说过重庆承接产业转移。

As for the understanding of Chongqing's undertaking of industrial transfer, 75% of the enterprises interviewed said that they had different degrees of understanding of Chongqing's undertaking of international and eastern industrial transfer; 18% of the enterprises interviewed said that they did not know much about Chongqing's undertaking of industrial transfer, but had not obtained relevant information; only 7% of the enterprises interviewed said that they did not know at all, and had never heard of Chongqing's undertaking of industrial transfer.

对于重庆承接产业转移的受访企业参与程度，现阶段外资的利用水平仍有较大的提升空间。根据调查结果，仅8%受访企业表示从事于从国际转移到重庆的产业；11%受访企业表示从事于从中国东部转移到重庆的产业；其余受访企业则表示未参与或不了解是否有参与。

As for the degree of participation of enterprises interviewed in undertaking industrial transfer in Chongqing, there is still much room for improvement in the utilization level of foreign capital at this stage. According to the results of the survey, only 8% of the enterprises surveyed said they were engaged in industries transferred from international to Chongqing; 11% of the enterprises surveyed said they were engaged in industries transferred from eastern China to Chongqing; the rest of the enterprises surveyed said they did not participate or did not know whether they were involved.

2.2 重庆承接国际和东部产业转移专题分析

Special Analysis of Chongqing's Undertaking International and Eastern Industrial Transfer

2.2.1 受访企业对重庆承接产业转移的体验

The experience of the enterprises interviewed in undertaking industrial transfer in Chongqing

在重庆积极投身于承接产业转移的进程中，外商投资企业不仅是重要参与者，也是建设进程的受益者。对于重庆承接产业转移对企业带来最大的帮助，受访企业感受最为明显的是为企业创造了更多的商业机会（占比24%），其次是促进产业配套环境升级、基础设施建设完善（占比19%），加快人才聚集、企业获取高素质人才更便利（占比16%），有利于企业获取和学习国际和沿海地区的先进技术和经验（占比15%）。也有少数受访企业表示，承接产业转移有助于完善重庆的产业体系、提升企业生产效率（占比14%），以及降低生产原料的获取难度和购买成本（占比12%）。

In the process of Chongqing's active participation in undertaking industrial transfer, foreign-invested enterprises are not only important participants, but also beneficiaries of the construction process. For Chongqing to undertake industrial transfer to bring the greatest help to enterprises, the most obvious feeling of the enterprises interviewed is to create more business opportunities for enterprises (accounting for 24%), followed by promoting the upgrading of industrial supporting environment, improving infrastructure construction (accounting for 19%), accelerating talent gathering, and making it more convenient for enterprises to obtain high-quality talents (accounting for 16%). It is beneficial for enterprises to acquire and learn advanced technology and experience from international and coastal areas (accounting for 15%). A small number of enterprises surveyed said that undertaking industrial transfer would help improve Chongqing's industrial system, improve production efficiency (14%), and reduce the difficulty of obtaining raw materials and purchasing costs (12%).

受访企业在参与重庆承接产业转移的过程中，也遇到一些困难。较多受访企业表示存在所在地区的产业配套不足，基础设施不完善的问题（占比24%），其次是企业对承接产业转移政策的了解程度不够充分（占比23%），政府扶持力度有待增强（占比20%）。也有少数受访企业表示承接产业成本过高、企业缺少资金来源（占比11%），无法获取满足企业要求的人力资源（占比9%），缺乏必要的生产要素（占比7%）以及缺乏前瞻性、有效的产业规划（占比6%）。

The enterprises interviewed also encountered some difficulties in the process of undertaking industrial transfer in Chongqing. More enterprises surveyed said that there were problems of insufficient industrial support and imperfect infrastructure in the region (24%), followed by insufficient understanding of the policy of undertaking industrial transfer (23%), and government support needs to be strengthened (20%). A small number of enterprises surveyed also indicated that the cost of undertaking industries was too high, enterprises lacked sources of funds (11%), could not obtain human resources to meet the requirements of enterprises (9%), lacked necessary factors of production (7%) and lacked forward-looking and effective industrial planning (6%).

2.2重庆承接国际和东部产业转移专题分析

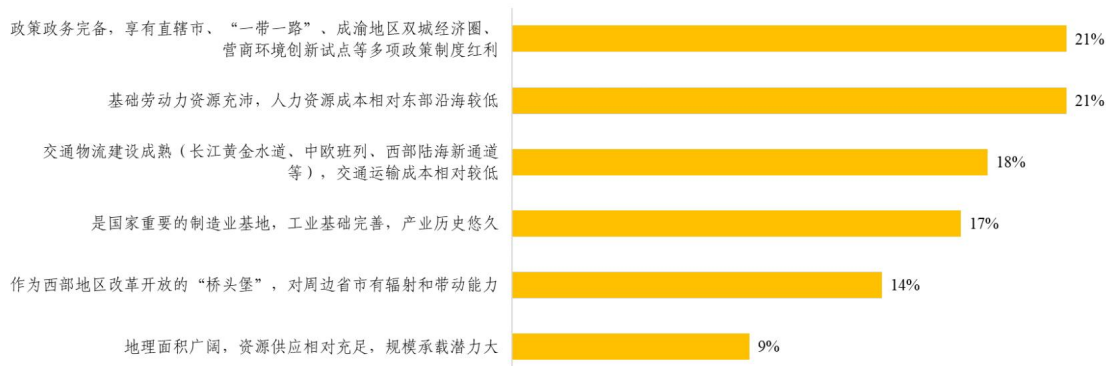
Special Analysis of Chongqing's Undertaking International and Eastern Industrial Transfer

2.2.2 受访企业对重庆承接产业转移的SWOT分析

The SWOT Analysis of the Interviewees on Chongqing's Undertaking of Industrial Transfer

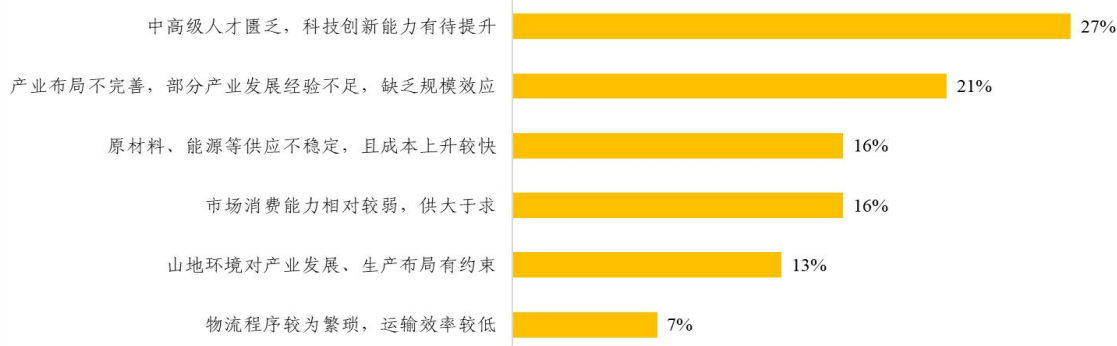
受访企业表示重庆在承接产业转移方面存在诸多优势，最为显著的优势包括：政策政务完备，享有直辖市、“一带一路”、成渝地区双城经济圈、营商环境创新试点等多项政策制度红利（占比21%）；基础劳动力资源充沛，人力资源成本相对东部沿海较低（占比21%）。各优势占比情况如下：

The enterprises interviewed said that Chongqing has many advantages in undertaking industrial transfer, and the most significant advantages include: complete policies and government affairs, enjoying a number of policy and system dividends (accounting for 21%) such as municipalities directly under the Central Government, the "one belt and one road", the two cities economic circle in Chengdu and Chongqing, and the pilot business environment innovation; The basic labor resources are abundant, and the cost of human resources is lower than that of the eastern coast (21%). The proportion of each advantage is as follows:



受访企业表示重庆在承接产业转移方面存在些许劣势，主要包括：中高级人才匮乏，科技创新能力有待提升（占比27%）；产业布局不完善，部分产业发展经验不足，缺乏规模效应（占比21%）。各劣势占比情况如下：

The enterprises interviewed said that Chongqing has some disadvantages in undertaking industrial transfer, mainly including: lack of middle and senior talents, scientific and technological innovation ability to be improved (accounting for 27%); imperfect industrial layout, lack of experience in the development of some industries, lack of scale effect (accounting for 21%). The proportion of each disadvantage is as follows:



2.2重庆承接国际和东部产业转移专题分析

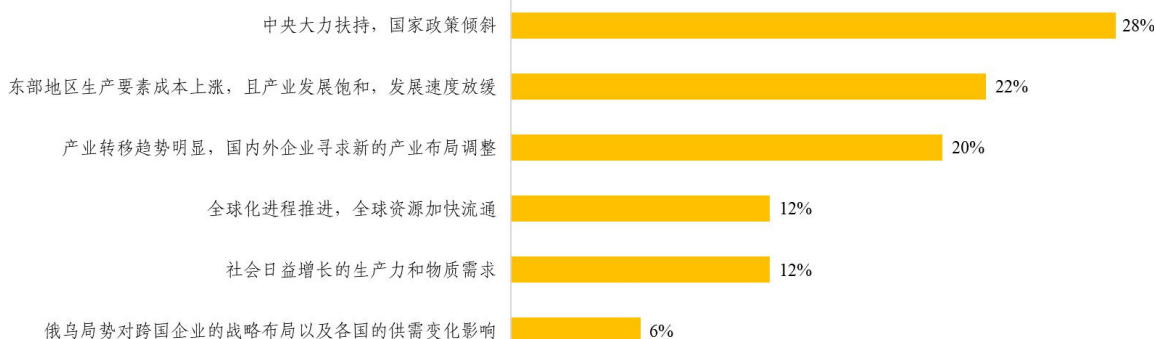
Special Analysis of Chongqing's Undertaking International and Eastern Industrial Transfer

2.2.2受访企业对重庆承接产业转移的SWOT分析

The SWOT Analysis of the Interviewees on Chongqing's Undertaking of Industrial Transfer

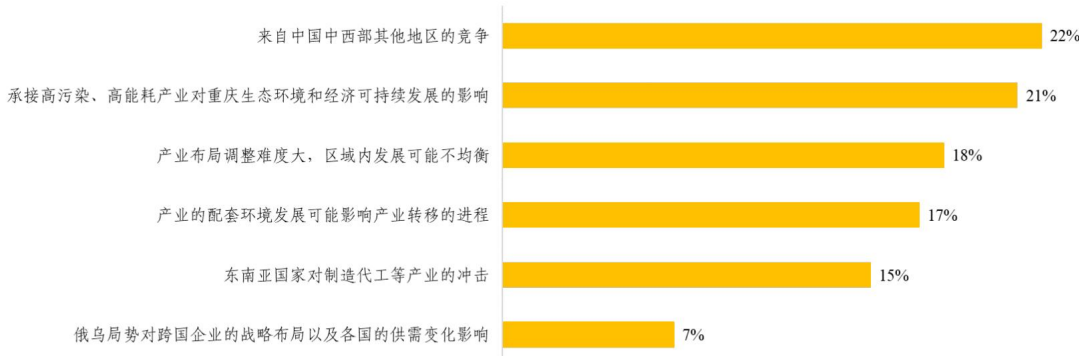
受访企业表示重庆在承接产业转移方面拥有许多机遇，主要体现在：中央大力扶持，国家政策倾斜（占比28%）；东部地区生产要素成本上涨，且产业发展饱和，发展速度放缓（占比22%）；产业转移趋势明显，国内外企业寻求新的产业布局调整（占比20%）。各机遇占比情况如下：

The enterprises interviewed said that Chongqing has many opportunities in undertaking industrial transfer, which are mainly reflected in the following aspects: the central government gives strong support and the national policy is inclined (accounting for 28%); the cost of production factors in the eastern region is rising, and the industrial development is saturated, and the development speed is slowing down (accounting for 22%); the trend of industrial transfer is obvious, and domestic and foreign enterprises seek new industrial layout adjustment (accounting for 20%). The proportion of each opportunity is as follows:



受访企业表示重庆在承接产业转移方面也面临较多挑战，主要包括：来自中国中西部其他地区的竞争（占比22%）；承接高污染、高能耗产业对重庆生态环境和经济可持续发展的影响（占比21%）。各挑战占比情况如下：

The enterprises interviewed said that Chongqing also faces many challenges in undertaking industrial transfer, mainly including: competition from other regions in central and western China (accounting for 22%); the impact of undertaking industries with high pollution and high energy consumption on Chongqing's ecological environment and sustainable economic development (accounting for 21%). The proportion of each challenge is as follows:



2.2 重庆承接国际和东部产业转移专题分析

Special Analysis of Chongqing's Undertaking International and Eastern Industrial Transfer

2.2.3 三项优势产业分析

Analysis of Three Advantageous Industries

在承接产业转移过程中，重庆已形成较有优势的产业，主要包括汽车产业、电子信息产业（含笔记本电脑）以及专业服务产业。针对这三个产业的表现，受访企业表示汽车行业在承接产业转移方面做得最为出色（占比47%）；其次是电子信息产业（占比41%），受访企业认为专业服务产业表现稍微逊色（占比仅12%）。

In the process of undertaking industrial transfer, Chongqing has formed more advantageous industries, mainly including automobile industry, electronic information industry (including notebook computers) and professional service industry. According to the performance of these three industries, the enterprises interviewed said that the automobile industry had done the best in undertaking industrial transfer (accounting for 47%), followed by the electronic information industry (accounting for 41%), and the enterprises interviewed thought that the professional service industry had performed slightly worse (accounting for only 12%).

汽车行业

The automotive industry

汽车行业是重庆的支柱产业，因技术沉淀扎实，规模聚簇效应明显，目前重庆已形成中国最大的汽车产业集群。尽管如此，受访企业表示在承接汽车产业转移过程中，还是受到了较多的竞争和冲击，主要包括：国外老牌车企和厂商积累的雄厚资本及丰富经验（占比24%）；外国或外省车企可能具备更强大的研发能力和更先进的技术工艺（占比21%）；兄弟省市（如沈阳、成都等）也在稳步承接和发展汽车产业（占比20%）；各品牌车企为抢占市场而实行的低价竞争策略（占比18%）；东南亚地区拥有相对更低的生产成本和廉价劳动力（占比17%）。

The automobile industry is the pillar industry in Chongqing, because of the solid technology precipitation and the obvious cluster effect of scale, Chongqing has formed the largest automobile industry cluster in China. In spite of this, the enterprises interviewed said that in the process of undertaking the transfer of the automobile industry, they were still subject to more competition and impact, mainly including: the strong capital and rich experience accumulated by the old foreign automobile enterprises and manufacturers (accounting for 24%); the foreign or provincial automobile enterprises may have stronger R & D capabilities and more advanced technology and technology (accounting for 21%); Other provinces and cities (such as Shenyang, Chengdu, etc.) are also steadily undertaking and developing the automobile industry (accounting for 20%); various brands of automobile enterprises are implementing low-price competition strategies to seize the market (accounting for 18%); Southeast Asia has relatively lower production costs and cheap labor (accounting for 17%).

面对上述各方竞争，重庆应考虑补齐或者增强汽车产业链，形成全产业链闭环，提升自身竞争力。针对需补齐或增强的环节，较多受访企业选择了系统开发环节（占比19%）、关键零部件制造环节（占比16%）和动力研发环节（占比14%）。

Faced with the above competition, Chongqing should consider completing or strengthening the automobile industry chain, forming a closed-loop of the whole industry chain, and enhancing its competitiveness. In view of the links that need to be supplemented or enhanced, more enterprises surveyed chose the system development link (19%), the key parts manufacturing link (16%) and the power R & D link (14%).

2.2重庆承接国际和东部产业转移专题分析

Special Analysis of Chongqing's Undertaking International and Eastern Industrial Transfer

2.2.3 三项优势产业分析

Analysis of Three Advantageous Industries

电子信息产业（含笔记本电脑）

Electronic information industry (including notebook computer)

电子信息产业一直以来都是重庆产业布局的重心所在。一方面，传统电子加工制造业一直是重庆的优势行业，另一方面，重庆也在积极布局未来产业，逐步加大集成电路相关投入。当前重庆已形成亚洲最大的电子信息产业集群。尽管如此，受访企业表示重庆在承接电子信息产业转移时，仍有部分环节亟需补齐或增强，主要包括系统开发环节（占比22%）、原材料配套环节（占比20%）和集成电路设计环节（占比19%）。

Electronic information industry has always been the focus of Chongqing's industrial layout. On the one hand, the traditional electronic processing and manufacturing industry has always been the dominant industry in Chongqing, on the other hand, Chongqing is also actively laying out future industries and gradually increasing investment in integrated circuits. At present, Chongqing has formed the largest electronic information industry cluster in Asia. Nevertheless, the enterprises surveyed said that when Chongqing undertakes the transfer of electronic information industry, there are still some links that need to be completed or strengthened urgently, including system development (22%), raw material matching (20%) and integrated circuit design (19%).

专业服务产业

Professional service industry

随着重庆产业改造升级和经济转型发展进程的逐渐深入，对于相关专业服务的需求愈发明显。重庆在承接专业服务产业转移时部分环节亟需补齐或增强，受访企业选择最多的为信息技术服务（占比23%），其次为物流服务（16%）和财税服务（13%）。

With the gradual deepening of Chongqing's industrial transformation and upgrading and economic transformation and development process, the demand for related professional services is becoming more and more obvious. When undertaking the transfer of professional service industries in Chongqing, some links need to be supplemented or strengthened urgently. The enterprises surveyed chose information technology services (23%), followed by logistics services (16%) and fiscal and taxation services (13%).

2.2.4 建议和总结

Suggestions and summary

重庆市作为中国中西部地区唯一的直辖市，是现代制造业基地、“一带一路”战略节点、长江经济带的西部中心枢纽和中国内陆开放高地，受访企业对重庆承接国际和东部产业转移充满期待。

安永建议，重庆在承接产业转移过程中，应持续优化产业发展的配套环境，形成产业分工体系；优化人力资源环境，吸引更多高素质人才以及科研机构聚集；完善工业园区的承接载体功能；避免承接高污染、高能耗产业。从而形成更加合理的产业分工格局，促进区域协调发展。

重庆应立足产业基础和资源等优势，大力发展优势特色产业，推动重点产业承接发展，进一步壮大产业规模，培育产业发展新优势，构建现代产业体系；进一步优化产业空间布局，引导转移产业集聚，促进产业园区规范化、集约化、特色化发展，增强重点地区产业集聚能力。同时，针对目前承接转移短板的专业服务产业：在承接信息技术服务产业转移方面，着力引进重大项目和相关产业配套对接项目，推动区块链、人工智能、大数据、物联网等新一代信息技术的应用，加快培育电子信息集群，构建集成电路、软件、网络通信产品等重要基地；在承接物流服务产业转移方面，大力发展国际物流、供应链物流、专业化物流，着力补齐冷链物流、应急物流等短板，加快建设内陆国际物流枢纽。

As the only municipality directly under the central government in the central and western regions of China, Chongqing is an important modern manufacturing base, the strategic node of "one belt and one road", the western central hub of the Yangtze River economic belt and the inland open highland of China. The enterprises interviewed are full of expectations for Chongqing to undertake international and eastern industrial transfer.

Ernst & Young suggests that in the process of undertaking industrial transfer, Chongqing should continue to optimize the supporting environment for industrial development, form an industrial division system, attract more high-quality talents and scientific research institutions to gather, improve the undertaking carrier function of industrial parks, and avoid undertaking industries with high pollution. So as to form a more rational pattern of industrial division and promote regional coordinated development.

Chongqing should base itself on the advantages of industrial foundation and resources, vigorously develop superior and characteristic industries, promote the development of key industries. At the same time, in view of the professional service industry that is currently short of undertaking the transfer, promoting the application of new generation information technology such as block chain and Internet of Things; In undertaking the transfer of logistics service industry, we should vigorously develop international logistics, supply chain logistics and specialized logistics, make up for the shortcomings of cold chain logistics and emergency logistics, and accelerate the construction of inland international logistics hub.

结束语 Concluding remarks

2022年受疫情管控压力、夏季高温火灾等客观因素，企业的生产经营遭受重大挑战，尽管受访企业对各项投资环境总体满意度有所下降，但仍基本高于2020年，部分投资环境满意度稳中有进，甚至创近五年新高。

In 2022, due to objective factors such as the pressure of epidemic control and the high temperature and fire in summer, the production and operation of enterprises are facing major challenges. Although the overall satisfaction of the enterprises surveyed with the investment environment has declined, it is still basically higher than that in 2020, and some of the investment environment satisfaction has made steady progress, even reaching a new high in the past five years.

过去五年，重庆如期完成脱贫攻坚、全面建成小康社会的历史任务，顺利实现“十三五”圆满收官、“十四五”良好开局。2022年在多重超出预期的困难和压力之下，全市坚持稳中求进工作总基调，统筹发展和安全，实现了稳增长、稳就业、稳物价的总体平衡；全力稳外贸、稳外资，制定高质量实施区域全面经济伙伴关系协定（RCEP）行动计划，启动实施外贸高质量发展三年行动计划和建设高质量外资集聚地三年行动计划。2022年10月，重庆市人民政府办公厅印发《重庆市进一步优化营商环境降低市场主体制度性交易成本工作任务清单》，细化量化目标任务。

Over the past five years, Chongqing has completed the historic task of fighting poverty and building a well-off society in an all-round way on schedule, and successfully achieved the successful conclusion of the 13th Five-Year Plan and the good start of the 14th Five-Year Plan. In 2022, under multiple difficulties and pressures beyond expectations, the city adhered to the general tone of steady progress, coordinated development and security, and achieved an overall balance of steady growth, stable employment and stable prices; We will make every effort to stabilize foreign trade and foreign investment, formulate a high-quality plan of action for implementing the Regional Comprehensive Economic Partnership Agreement (RCEP), and launch a three-year plan of action for high-quality development of foreign trade and a three-year plan of action for building a high-quality foreign investment gathering place. In October 2022, the General Office of the Chongqing Municipal People's Government issued the List of Tasks for Further Optimizing the Business Environment and Reducing the Institutional Transaction Costs of Market Subjects in Chongqing, detailing the quantitative objectives and tasks.

结束语 Concluding remarks

在2022年6月28日中共中央宣传部举行的“中国这十年”系列主题新闻发布会上，国家发展改革委副秘书长苏伟提到，从2013年至今，中国营商环境全球排名从第96位跃升至最新的第31位。中国国际贸易促进委员会发布的《2022年度中国营商环境研究报告》显示，超九成受访企业对中国营商环境评价为“满意”及以上水平，外资企业普遍看好中国高质量发展新机遇。中国营商环境未来一片向好，且2022年末国家的疫情防控策略发生改变，重庆应抓住后疫情时期的新机遇，立足新发展阶段，积极服务和融入新发展格局，以市场主体需求为导向深化改革开放，落实扩大内需战略，加快建设现代化经济体系，提振外资企业在渝发展的信心，打造高质量外资集聚地。相信重庆作为未来西部金融中心、国际消费中心城市、内陆现代服务业发展先行区、双城经济圈主体之一，将着力营造市场化、法治化、国际化营商环境！

At a series of thematic press conferences held by the Publicity Department on June 28, 2022, Su Wei, Deputy Secretary-General of the Development and Reform Commission, mentioned that since 2013, the global ranking of business environment has jumped from 96th to the latest 31st. According to the Research Report on China's Business Environment in 2022 issued by the Council for the Promotion of International Trade, more than 90% of the enterprises surveyed rated the business environment as "satisfactory" or above, and foreign-funded enterprises are generally optimistic about new opportunities for high-quality development. The business environment will be better in the future, and the national epidemic prevention and control strategy will change at the end of 2022. Chongqing should seize the new opportunities in the post-epidemic period, base itself on the new stage of development, actively serve and integrate into the new development pattern, deepen reform and opening up with the market demand as the guide, implement the strategy of expanding domestic demand, speed up the construction of a modern economic system, and boost the confidence of foreign-funded enterprises in Chongqing. Create a high-quality foreign investment gathering place. It is believed that Chongqing, as the future western financial center, international consumption center city, inland modern service industry development pioneer area and one of the main bodies of the Shuangcheng Economic Circle, will strive to create a market-oriented, legalized and international business environment!

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