

2023年 重庆市外商投资环境测评报告 Chongqing Foreign Investment Environment Evaluation Report 2024

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

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重庆市外商投资企业协会与安永（中国）企业咨询有限公司对于《2024年重庆市外商投资环境测评报告》共同享有版权，任何第三方未经所有版权人的事先书面授权，不得转载、摘编，或以任何其他方式使用其中的相关信息和调查成果或用于其它商业用途。

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前言

Preface

《重庆市外商投资环境测评报告》（以下简称《测评报告》）系重庆市外商投资企业协会组织编写的系列报告，以期对重庆市外商投资环境进行持续测评。《测评报告》自2016年首次发布以来，至今已连续发布了七年。《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。《2024年重庆市外商投资环境测评报告》（以下简称《2024年测评报告》）延续了以前年度的主要测评内容，另外专门针对智能网联新能源汽车产业链相关生产性服务业情况进行了调查。

本次调查获得了作为全球领先的审计、税务、战略、交易和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的设计和 data 整理，以及《2024年测评报告》的编制。

欢迎中外投资者在使用过程中提出宝贵意见和建议。

"Chongqing Foreign Investment Environment Evaluation Report" (hereinafter referred to as the "Evaluation Report") is a series of reports issued by the Chongqing Association of Enterprises with Foreign Investment to continuously evaluate the foreign investment environment in Chongqing. Since the first release of the "Evaluation Report" in 2016, it has been released for seven consecutive years. The "Evaluation Report" aims to closely track the opinions and suggestions of foreign-invested enterprises, deeply analyze the changes in Chongqing's foreign investment environment in recent years, comprehensively and objectively reflect the achievements and problems of business environment development, so as to help optimize Chongqing's business environment. "2024 Evaluation Report" keeps to assess the major investment environments as what have done in last years, and specifically adds evaluation analysis of investigates the producer service industry related to the Intelligent Connected new energy vehicle industry chain.

The issuance of "2024 Evaluation Report" was strongly supported by Ernst & Young ("EY"), one of the world's leading audit, tax, strategy, transactions and advisory services organization. EY participated in the design of survey questionnaire template, numerical analysis on survey feedback, and compilation of "2024 Evaluation Report".

Any opinions, suggestions or ideas are welcomed.



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5A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，在重庆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，并产生了广泛影响。

Founded in 1988, Chongqing Association of Enterprises with Foreign Investment ("CQAEFI") is a non-profit social organization affiliated to the Chongqing Municipal Commission of Commerce with voluntary access to foreign investors (including investors from Hong Kong, Macao and Taiwan) and is a 5A-level social organization. For more than 30 years, with the care and support from the Communist Party of China Chongqing Committee and Chongqing Municipal People's Government, under the guidance of the Chongqing Municipal Commission of Commerce and relevant municipal departments, CQAEFI has upheld the service philosophy of "gathering members, serving enterprises, contacting government, and giving back to society", given full play to its role as the bridge between the government and foreign enterprises, promoted the healthy development of foreign-invested enterprises in Chongqing and contributions to the city's social and economic progress. Its efforts have been well recognized by foreign-invested enterprises in Chongqing as well as the society, bringing about an extensive influence at home and abroad.

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重庆总体概况

Overview of Chongqing

1. 重庆概览

Glance of Chongqing

2. 大事记

Milestones

3. 外商投资企业在重庆市的注册数量分布图

Map Illustrating Volume of Foreign-invested Enterprises Registered in Chongqing

重庆概览

Glance of Chongqing



城市简介 Introduction

重庆，简称“渝”，是**中国中西部唯一的直辖市**，也是长江上游地区经济中心、国家中心城市，中国最具增长潜力的城市。

Chongqing, referred to as "Yu" for short, is the only municipality directly under the Central Government in central and western China, the economic center and national central city in the upper reaches of the Yangtze River, and the city with the most growth potential in China.



文化底蕴 Cultural heritage

中国著名历史文化名城，是巴渝文化的发祥地。公元581年，隋文帝改楚州为渝州，重庆始简称“渝”。公元1102年，渝州改称恭州。公元1189年，宋光宗赵惇先封恭王再即帝位，称为“双重喜庆”，遂升恭州为重庆府，重庆由此而得名。

Chongqing, being one of China's famous historical and cultural city, is the birthplace of Bayu culture. In 581 AD, Emperor Wen of Sui changed Chuzhou into Yuzhou, and Chongqing was abbreviated as "Yu". In 1102 AD, Yuzhou was renamed Gongzhou. In 1189 AD, Zhao Dun, Emperor Guangzong of the Song Dynasty, first granted the title of King Gong and then the throne, which was called "Double Joy", and then elevated Gongzhou to Chongqing Prefecture, hence the name of Chongqing.



经济概况 Economic profile

2023年，地区生产总值（GDP）达**30,145.79亿元**，同比增长**6.1%**，全国排名**第五**。

In 2023, the regional Gross Domestic Product (GDP) reached RMB 3.01 trillion, ranking fifth nationwide, with an average annual growth rate of 6.1%.



产业发展 Industry development

2023年，重庆第一产业实现增加值**2,074.68亿元**，增长**4.6%**；第二产业实现增加值**11,699.14亿元**，增长**6.5%**；第三产业实现增加值**16,371.97亿元**，增长**5.9%**。

In 2023, Chongqing's primary industry realized an added value of RMB 207.468 billion, an increase of 4.6%; The added value of the secondary industry was RMB 1,169.9 billion, an increase of 6.5%; The added value of the tertiary industry was RMB 1,637.2 billion, an increase of 5.9%.



生态资源 Ecological resources

重庆市共有**291个A级景区**，其中**5A级景区12个**。

Chongqing has 291 Grade A scenic spots, including 12 Grade 5A scenic spots.

2023年，全市森林覆盖率达到**55.06%**，森林蓄积量达到**2.74亿立方米**。

In 2023, the city's forest coverage rate reached 55.06%, and the forest storage volume reached 274 million cubic meters.



区位优势 Location advantage

重庆是我国西部唯一的集铁、公、水、空运输方式于一体的特大城市。

Chongqing is the only megacity in western China integrating railway, public transportation, water and air transportation.

西部陆海新通道通达**119个国家**，**393个港口**。

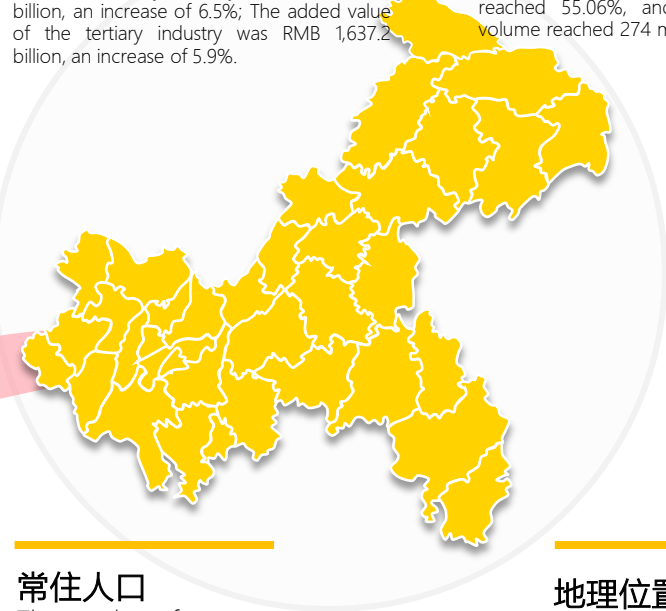
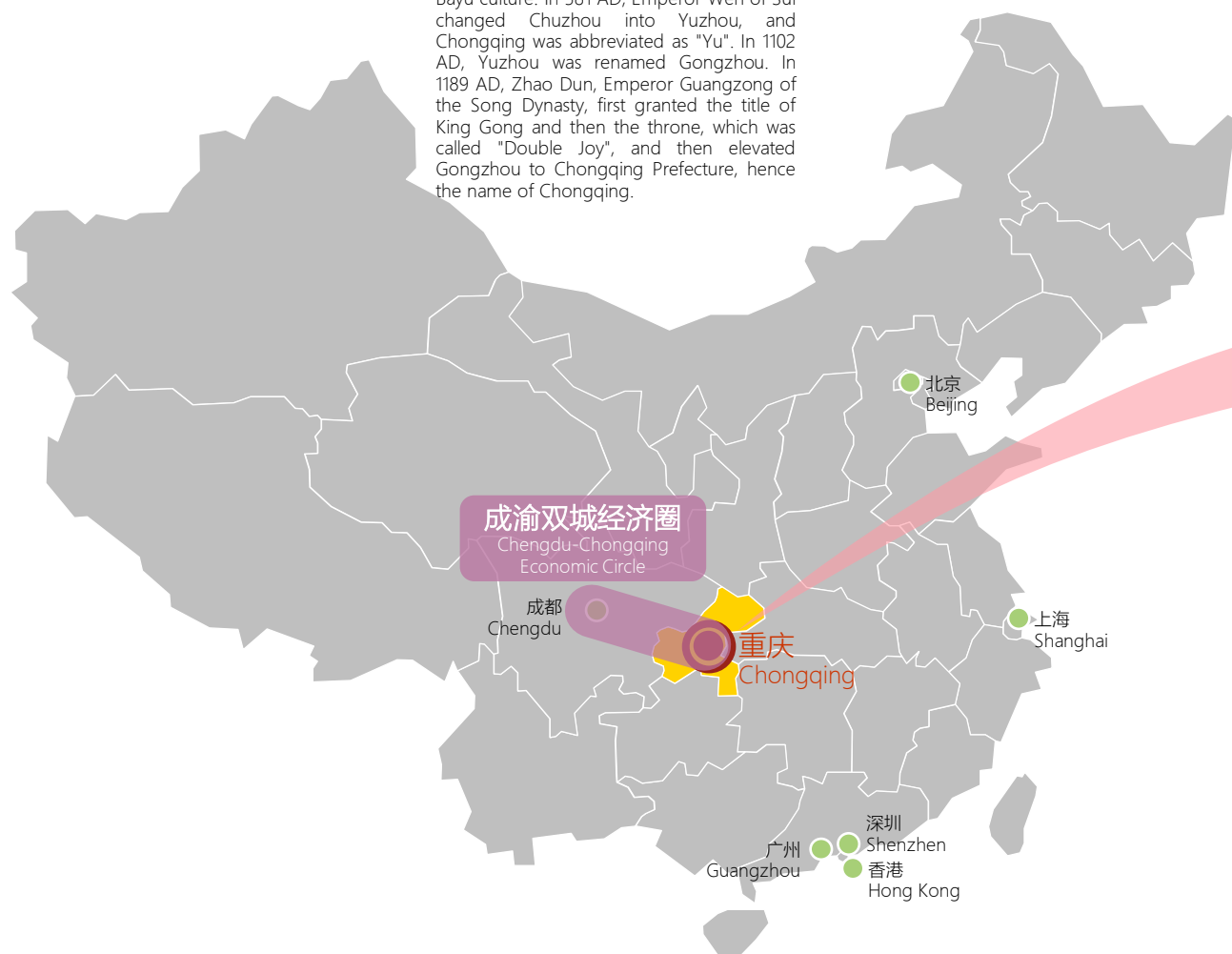
The new land and sea channel in the west connects 119 countries and 393 ports.

中欧班列（成渝）辐射亚欧近**40个国家**，**超100个城市节点**。

The China-Europe Express (Chengdu-Chongqing) radiates nearly 40 countries in Asia and Europe, with more than 100 urban nodes.

长江黄金水道基本建成“一干两支”航道体系，航道总里程超过**4,500公里**。

The Golden Waterway of the Yangtze River has basically been built into a "one trunk and two branches" waterway system, with a total waterway mileage of more than 4500 kilometers.



常住人口

The number of permanent residents

2023年年末重庆常住人口**3,191.43万人**，处于全国**第一位**。

As of 2023, the number of permanent residents reached 31.9143 million, ranking first in the country.

地理位置

Geography location

中国内陆西南部、长江上游地区。

Located in Southwest China and the upper reaches of the Yangtze River.

行政面积

Administrative area

82,402平方公里。

82402 square kilometers.

行政区划

Administrative divisions

下辖**26市辖区**、**8县**、**4自治县**。

26 districts, 8 counties and 4 autonomous counties.

大事记

Milestones



2023年1月
Jan

重庆召开建设成渝地区双城经济圈工作推进大会，被称为“新春第一会”。大会明确提出将成渝地区双城经济圈建设作为市委“一号工程”和全市工作的总抓手总牵引。

Chongqing held a conference to promote the development of the Chengdu-Chongqing Economic Circle, known as the "first meeting of the Spring Festival". The conference clearly proposed that the development of Chengdu-Chongqing Economic Circle should be regarded as the "No.1 project".



2023年3月
Mar

《重庆市推动成渝地区双城经济圈建设行动方案（2023—2027年）》出台，提出“十项行动”，作为推动双城经济圈建设总抓手；制定年度重大项目、重大改革、重大政策、重大平台清单，滚动实施、有序推动。

"Chongqing Action Plan for Promoting the Development of Chengdu-Chongqing Double City Economic Circle (2023-2027)" was issued, proposing "ten actions" as the general starting point for promoting the development of Chengdu-Chongqing Economic Circle; Formulate the annual list of major projects, major reforms, major policies and major platforms, and implement them in a rolling and orderly manner.



2023年4月
Apr

《重庆市加快建设西部陆海新通道五年行动方案（2023—2027年）》印发，《方案》提出到2027年，通道发展指数达到170，重庆经西部陆海新通道运行的货运量、货值与中欧班列和长江黄金水道的联运箱量，均实现倍增。

"The Five-year Action Plan of Chongqing to Accelerate the Development of a New Land and Sea Channel in the West (2023-2027)" was issued. The Plan proposes that by 2027, the channel development index will reach 170, and the freight volume and value of Chongqing running through the new land and sea channel in the west will double with the combined transport volume of China-Europe trains and the Yangtze River Golden Waterway.



2023年6月
Jun

重庆市推动制造业高质量发展大会召开。会上强调，要着力打造“33618”现代制造业集群体系，立足现有基础，放大特色优势，构建3大万亿级主导产业集群，3大五千亿级支柱产业集群，6大千亿级特色优势产业集群，18个“新星”产业集群。

Chongqing Municipal Conference on Promoting the High-quality Development of Manufacturing Industry was held. At the meeting, it was stressed that Chongqing should focus on building the "33618" modern manufacturing cluster system, base on the existing foundation, enlarge the characteristic advantages, and build three trillion-level (in RMB) leading industrial clusters, three 500 billion-level (in RMB) pillar industrial clusters, six 100 billion-level (in RMB) characteristic advantage industrial clusters, and 18 "new star" industrial clusters.



2023年9月
Sep

2023年中国国际智能产业博览会开幕，国家主席习近平致来贺信，指出应持续促进数字技术和实体经济深度融合，协同推进数字产业化和产业数字化，加快建设网络强国、数字中国。

At the opening of China International Intelligent Industry Expo in 2023, President Xi Jinping sent a congratulatory letter, pointing out that Chongqing should continue to promote the deep integration of digital technology and the real economy, coordinate the promotion of digital industrialization and industrial digitalization, and accelerate the construction of a strong network country and digital China.



2023年11月
Nov

2023年11月13日-16日，全国人大常委会委员长赵乐际在重庆调研。他强调，要以“两个联系”为抓手深化拓展代表工作，支持和保障代表更好地依法履职，当好党和国家联系人民群众的桥梁。代表联系群众的机制和平台要建好更要用好，活动内容要聚焦代表法定职责，活动方式要方便群众参与。

From November 13 to 16, 2023, Zhao Leji, Chairman of the Standing Committee of the National People's Congress, conducted a survey in Chongqing. He stressed that Chongqing should take the "two links" as the starting point to deepen and expand the work of people's deputies, support and ensure that deputies better perform their duties according to law, and act as a bridge between the party and the state and the people. The mechanism and platform for people's deputies to contact the masses should be built and used well, the content of activities should focus on the legal responsibilities of deputies, and the way of activities should facilitate the participation of the masses.



2023年11月
Nov

重庆和科技部共同举办的首届“一带一路”科技交流大会在悦来会展中心开幕。此次科技交流会议由科技部、中国科学院、中国工程院、中国科协联合主办，共同商议推进未来科技创新发展、科技合作等方面的重点举措。

The first Belt and Road Science and Technology Exchange Conference jointly held by Chongqing and the Ministry of Science and Technology was opened in Chongqing Yuelai Convention and Exhibition Center. Sponsored by the Ministry of Science and Technology, the Chinese Academy of Sciences, the Chinese Academy of Engineering and the Chinese Association for Science and Technology, the meeting discussed key measures to promote future technological innovation and cooperation.



2023年12月
Dec

12月17日，重庆市人民政府发布了《关于做好稳外贸稳外资稳外经有关工作的通知》，提出加快推进外贸动力结构转换、积极有效利用外资、完善跨境投资布局等主要任务。

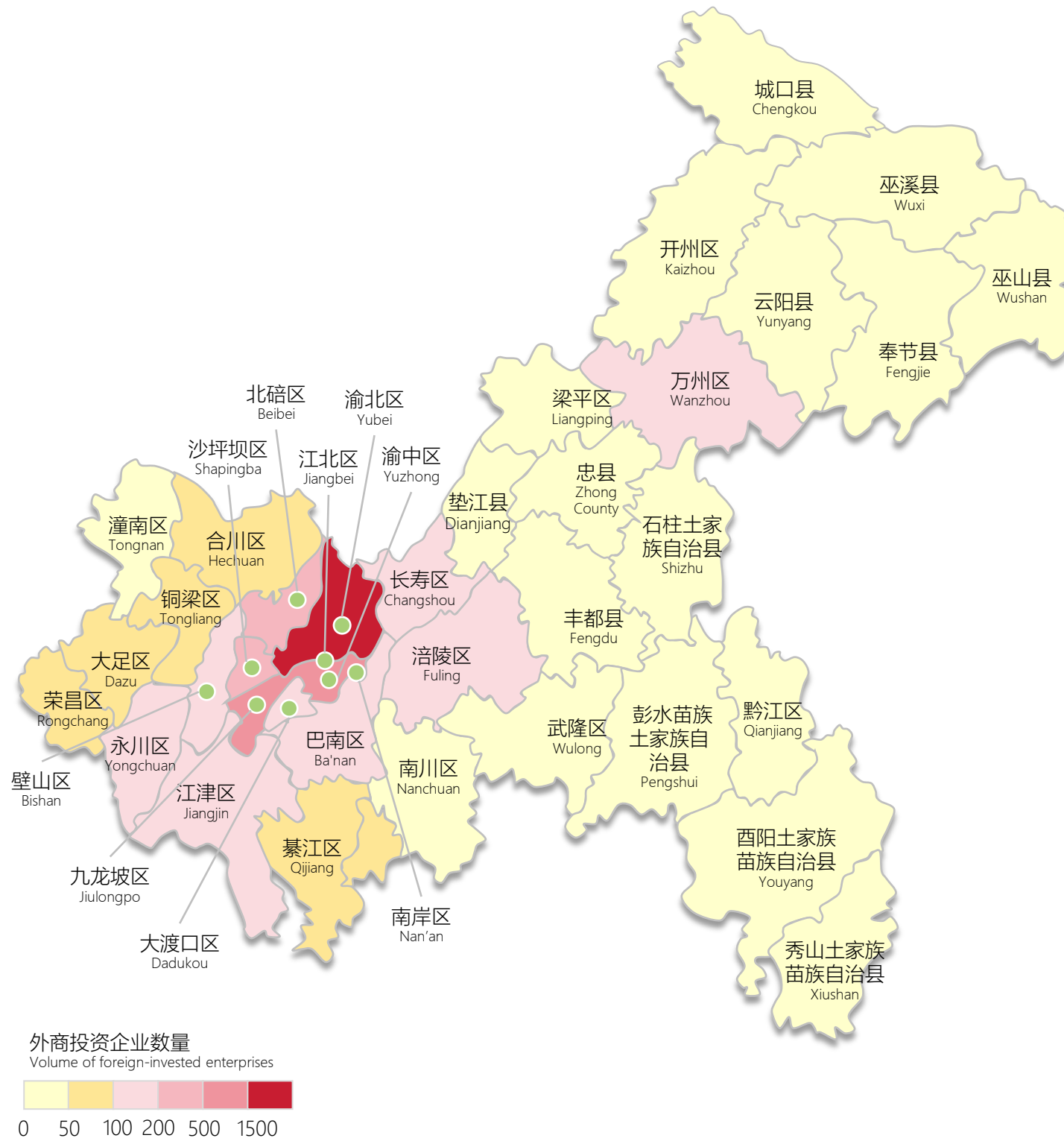
On December 17, the Chongqing Municipal People's Government issued "the Notice on Stabilizing Foreign Trade and Foreign Capital and Stabilizing Foreign Economy", proposing to accelerate the transformation of the power structure of foreign trade, actively and effectively utilize foreign capital, and improve the layout of cross-border investment.

外商投资企业在重庆市的注册数量分布图

Map Illustrating Volume of Foreign-invested Enterprises Registered in Chongqing

根据重庆市商务委截至2023年12月31日的数据统计，安永整理制作了重庆市外商投资企业在重庆38个行政区划注册数量分布地图。如本页地图所示，重庆市的外商投资企业主要注册在渝北区、渝中区、江北区、九龙坡区、南岸区和沙坪坝区等中心城区。

Based on the survey statistics as of 31 December, 2023 provided by Chongqing Commerce Commission, EY prepared the map illustrating the volume of foreign-invested enterprises registered in each of the 38 districts/counties of Chongqing. Based on the map, it appears that Chongqing's foreign-invested enterprises are mainly registered in Yubei District, Yuzhong District, Jiangbei District, Jiulongpo District, Nan'an District and Shapingba District, etc.



外商投资企业数量 Number of Foreign-Invested Enterprises	行政区划 Districts/Counties
≥1500	渝北区 Yubei
500~1500	渝中区 Yuzhong 江北区 Jiangbei 九龙坡区 Jiulongpo
200~500	沙坪坝区 Shapingba 南岸区 Nan'an 北碚区 Beibei
100~200	巴南区 Ba'nan 江津区 Jiangjin 永川区 Yongchuan 万州区 Wanzhou 涪陵区 Fuling 长寿区 Changshou 大渡口区 Dadukou 璧山区 Bishan
50~100	合川区 Hechuan 綦江区 Qijiang 大足区 Dazu 铜梁区 Tongliang 荣昌区 Rongchang
<50	南川区 Nanchuan 黔江区 Qianjiang 忠县 Zhong County 开州区 Kaizhou 彭水苗族土家族自治县 Pengshui 丰都县 Fengdu 潼南区 Tongnan 垫江县 Dianjiang 云阳县 Yunyang 梁平区 Liangping 武隆区 Wulong 酉阳土家族苗族自治县 Youyang 秀山土家族苗族自治县 Xiushan 石柱土家族自治县 Shizhu 城口县 Chengkou 巫溪县 Wuxi

2

重庆市外商投资企业投资环境 问卷调查结果分析

Evaluation Analysis of Chongqing Foreign Investment
Environment

1. 概述
Overview
2. 要素环境
Fundamental Environment
3. 市场环境
Market Environment
4. 政府与政策服务环境
Policies and Government Services Environment
5. 生活环境
Living Environment
6. 企业发展
Enterprise Development
7. 测评结果特点分析
Analysis of Characteristics of the Survey



概述

Overview



针对《2024年测评报告》，重庆市外商投资企业协会累计收回完成问卷421份。根据回收问卷，这421个受访外商投资企业的覆盖范围比较广泛，具有调查的普遍性和典型性。

For the preparation of "2024 Evaluation Report", 421 survey questionnaires were completed and collected back by Chongqing Association of Enterprises with Foreign Investment. According to the collected questionnaire, the coverage of these 421 surveyed foreign-invested enterprises is relatively wide, which has the universality and typicality of the survey.

本次调查活动涵盖了以下五项内容：

The survey covered the following five aspects:



要素环境 Fundamental Environment

- ▶ 能源环境 Energy Environment
- ▶ 用地用房环境 Land and Property Environment



市场环境 Market Environment

- ▶ 经济环境 Economic Environment
- ▶ 金融环境 Financial Environment
- ▶ 税收环境 Tax Environment
- ▶ 人力资源环境 Human Resources Environment
- ▶ 产业配套环境 Industry Supporting Facility Environment
- ▶ 物流环境 Logistics Environment
- ▶ 环保建设 Environmental Protection
- ▶ 科技环境 Scientific and Technological Environment



政府与政策服务环境 Policies and Government Services Environment



生活环境 Living Environment



企业发展 Enterprise Development

- ▶ 较前一年度的经营难易程度 Status of Business Operation Compared with Last Year
- ▶ 在重庆发展前景的预期 Expectations for Future Development in Chongqing
- ▶ 在重庆生产经营面临的主要挑战 Key challenges of Business Operation in Chongqing
- ▶ 未来在重庆的投资意向 Future Investment Plans in Chongqing
- ▶ 投资母国及地区的来源地图 Map for Home Countries (Regions) of Foreign-invested Enterprises

在设计问卷调查时，受访企业的满意度采用10分制（10分最高，1分最低）。为方便理解，10至7分为满意，6至5分为中等，4至1分为不满意。

When designing the questionnaire, a 10-score assessment standard was introduced (i.e., 10 score refers to Excellent, while 1 score refers to Very Poor). For easy understanding, 10 to 7 score represents "Satisfied", 6 to 5 score represents "Medium", and 4 to 1 score represents "Unsatisfied".



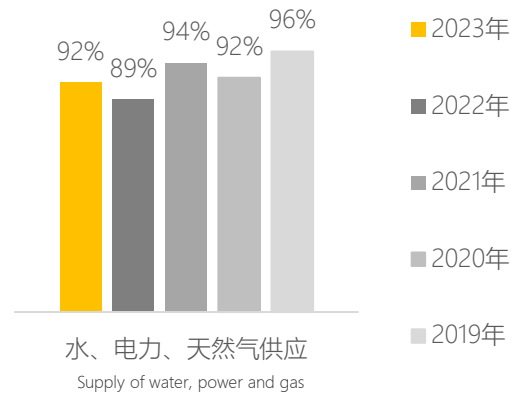
法治是最好的营商环境

The Rule of Law is the Best Business Environment

要素环境

Fundamental Environment

能源环境 Energy Environment



2023年有92%受访企业对重庆市的电力供应、天然气供应、水供应表示满意，认为其价格适中、供应量充足。

In 2023, 92% of the respondents were satisfied with the power supply, natural gas supply and water supply in Chongqing, believing that the price was moderate and the supply was sufficient.

近五年调查数据显示，受访企业对历年能源环境满意度总体评价较高，且位于各项评价指标前列。与2022年相比，受访企业对2023年能源环境满意度有小幅上升，基本恢复到了疫情前水平。

Survey data in the past five years show that the respondents have a high overall evaluation of energy and environmental satisfaction over the years, and are in the forefront of various evaluation indicators. Compared with 2022, the satisfaction of the respondents with energy and environment in 2023 has increased slightly, and has basically recovered to the pre-epidemic level.

根据问卷反馈，部分受访企业依然存在下列不满意之处：电力供应不足、电压不稳定、停水情况频发、电费和气费价格偏高、电力优惠难享受等。

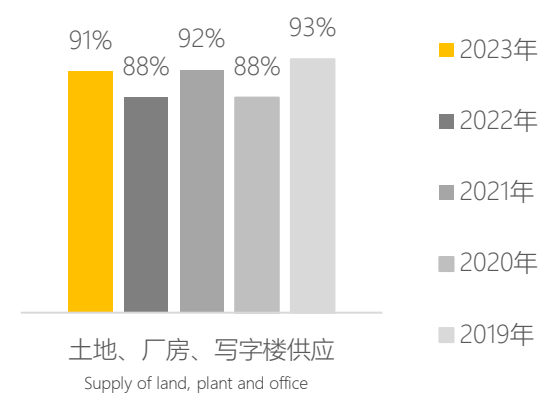
According to the questionnaire feedback, some respondents still have the following dissatisfaction: insufficient power supply, unstable voltage, frequent water supply failure, high electricity and gas prices, and difficult to enjoy electricity concessions.

安永建议 EY Suggestion

能源环境稳定关乎企业的日常平稳运作。安永建议有关部门加强日常水压、电力、天然气供应稳定性监测，加强基础电力设施、水力设施、天然气设施建设；制定合理的应急预案，维护水电气的稳定供应；根据民用气“峰谷”规律调节调整气量，平衡管输压力，保证供气充足；与水电气供应商协商，制定企业水电气价格优惠方案，降低企业水电气使用成本；通过新媒体等渠道大力宣传、水电气相关优惠政策，让企业应享尽享电力优惠。

Energy and environmental stability is related to the daily smooth operation of enterprises. EY recommends that relevant departments strengthen the daily monitoring of water pressure, power and natural gas supply stability, and strengthen the construction of infrastructure power facilities, water facilities and natural gas facilities; Formulate reasonable emergency plans to maintain the stable supply of water and electricity; Adjust the gas volume according to the change of "peak and valley" of civil gas, balance the pipeline pressure and ensure sufficient gas supply; Negotiate with water and electricity suppliers to formulate preferential water and electricity price schemes for enterprises to reduce the cost of water and electricity use; Through new media and other channels, vigorously promote preferential policies related to water and electricity, so that enterprises should enjoy preferential electricity.

用地用房环境 Land and Property Environment



2023年有91%受访企业对重庆市的土地、厂房、写字楼供应表示满意，认为其价格适中、供应量充足。

In 2023, 91% of the respondents were satisfied with the supply of land, factories and office buildings in Chongqing, believing that the price was moderate and the supply was sufficient.

近五年调查数据显示，受访企业对历年能源环境满意度总体评价很高。受访企业对2023年用地用房环境满意度较2022年上升3%。

Survey data in the past five years show that the respondents have a high overall evaluation of energy and environmental satisfaction over the years. The respondents' satisfaction with the environment of land and property in 2023 increased by 3% compared with 2022.

根据问卷反馈，部分受访企业依然存在下列不满意之处：房租价格高企业负担重、相关证照办理手续复杂、土地利用率低、区县公共交通建设有待完善等。

According to the questionnaire feedback, some respondents still have the following dissatisfaction areas: high rent prices, heavy burden on enterprises, complex procedures for obtaining relevant certificates and licenses, low land utilization rate, and the need to improve public transportation construction in districts and counties.

安永建议 EY Suggestion

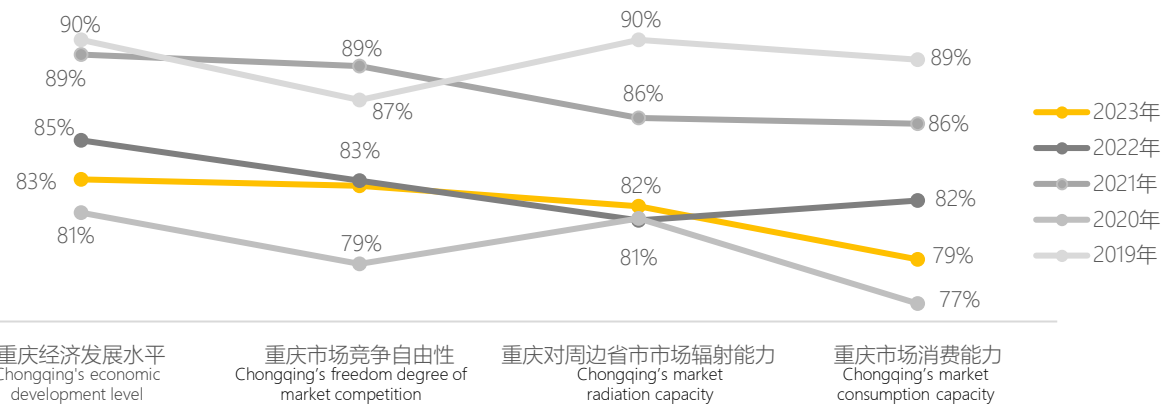
房屋和土地是企业发展的必备因素和坚实基础，用地用房环境对企业发展至关重要。安永建议有关部门梳理证照办理流程，秉承“最多跑一次”的服务理念，简化土地证照办理流程，并汇总形成指导手册，在“渝快办”等平台公布；开通企业办证绿色通道等，提高企业办证效率；提前规划土地用途，划分产业园用地与生活用地等，提高土地利用效率；与产业园、金融街等磋商，制定企业房租优惠政策，达到一定条件的企业可以享受房租优惠减免，减轻企业负担。

Property and land are the necessary factors and solid foundation for the development of enterprises. EY recommends that relevant departments sort out the license processing process, adhere to the service concept of "running at most once", simplify the land license processing process, and summarize it into a guide manual, and announced on platforms such as "Chongqing Express Office"; Open a green channel for enterprise certification to improve the efficiency of enterprise certification; Plan land use in advance, divide industrial park land and living land, etc., and improve land utilization rate; Negotiate with industrial parks and financial streets to formulate preferential rent policies for enterprises, and enterprises that meet certain conditions can enjoy preferential rent reduction and exemption to reduce the burden on enterprises.

市场环境

Market Environment

经济环境 Economic Environment



2023年分别有83%、83%、82%、79%的受访企业对重庆经济发展水平、市场竞争自由性、对周边省市市场辐射能力、市场消费能力表示满意。受访企业对重庆市场消费能力、经济发展水平的满意度，较2022年分别下滑3%、2%，这主要受全球经济不景气、国内经济增速放缓、大众消费意愿降低等因素的影响。但受访企业对重庆对周边省市市场辐射能力满意度较2022年略有上升，反映出重庆作为西部排头兵，对周边经济发展的引领作用仍在稳定发挥。

In 2023, 83%, 83%, 82% and 79% of the respondents expressed satisfaction with Chongqing's economic development level, market competition freedom, market radiation ability of surrounding provinces and cities, and market consumption ability. The respondents' satisfaction with Chongqing's market consumption capacity and economic development level declined by 3% and 2% respectively compared with 2022, mainly affected by factors such as the global economic downturn, the slowdown of domestic economic growth and the reduction of public consumption willingness. However, the satisfaction of the respondents with Chongqing's market radiation ability to the surrounding provinces and cities has increased slightly compared with 2022, reflecting that Chongqing, as the leader of the western region, is still playing a leading role in the development of the surrounding economy.

根据问卷反馈，部分受访企业反馈重庆经济环境良好公平，表示对重庆经济发展较为看好。而部分受访企业不满意的原因主要有：重庆整体消费水平低、居民消费意愿低、行业竞争激烈、市场自由竞争度低等。

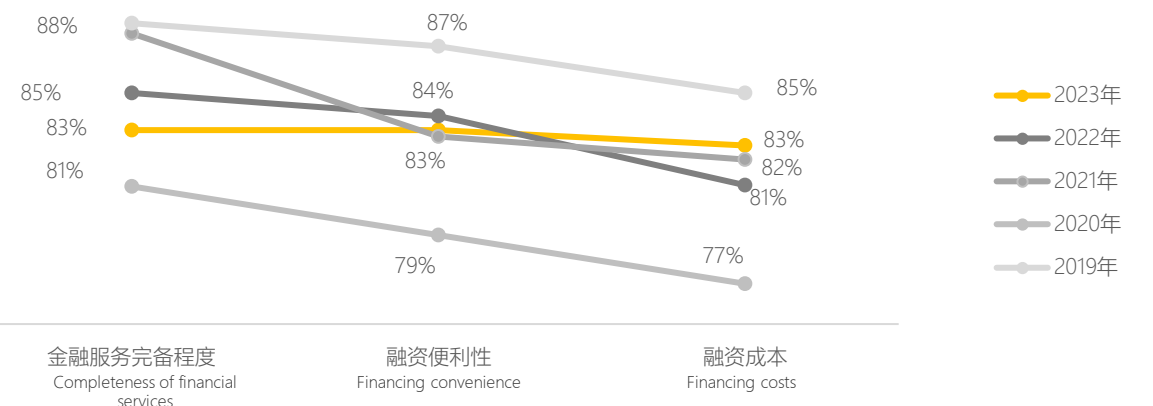
According to the questionnaire feedback, some of the respondents feedback that Chongqing's economic environment is good and fair, indicating that they are more optimistic about the economic development of Chongqing. The main reasons for dissatisfaction of some enterprises interviewed are: low overall consumption level of Chongqing, low willingness of residents to consume, fierce competition in the industry, and low degree of free competition in the market.

安永建议 EY Suggestion

经济是城市发展引擎，以经济建设为中心，提振市场信心，才能留住企业，同时吸引更多优质企业落户。安永建议有关部门继续采取发放消费券等形式增加居民消费意愿，提高整体消费水平，让更多资金流入市场，激发市场活力；通过促进消费来制造需求，以缓解供应方的激烈竞争，促进企业良性循环及发展；重庆应借鉴沿海城市相关发展经验，出台政策鼓励企业发展，并加大对垄断、舞弊等行为的查处力度，开通问题反馈专线，促进市场良性竞争、自由竞争。

Economy is the engine of urban development. Only by taking economic construction as the center and boosting market confidence can Chongqing retain enterprises and attract more high-quality enterprises to settle down. EY recommends that relevant departments continue to increase residents' consumption willingness by issuing consumption vouchers, improve the overall consumption level, let more funds flow into the market and stimulate market vitality; Manufacturing demand through promoting consumption to alleviate fierce competition on the supply side and promote the virtuous circle and development of enterprises; Chongqing shall learn from the relevant development experience of coastal cities, promulgate policies to encourage the development of enterprises, strengthen the investigation and punishment of monopolistic, fraudulent and other acts, open a special line for problem feedback, and promote benign and free competition in the market.

金融环境 Financial Environment



2023年有83%、83%、83%的受访企业对重庆金融服务完备程度、融资便利性、融资成本表示满意。近五年调查数据显示，受访企业对金融环境的整体满意度2023年较2022年基本持平。其中，受经济大环境下行影响，银行等金融机构对小微放贷审核更为严格，受访企业对金融服务完备程度、融资便利性的满意度较2022年有小幅下滑。

In 2023, 83%, 83% and 83% of the respondents expressed satisfaction with the completeness of financial services, financing convenience and financing costs in Chongqing. Survey data in the past five years show that the overall satisfaction of the respondents with the financial environment in 2023 is almost the same as that in 2022. Among them, due to the downward impact of the economic environment, banks and other financial institutions have more stringent reviews of small and micro loans, and the satisfaction of the respondents with the completeness of financial services and financing convenience has declined slightly compared with 2022.

根据问卷反馈，部分企业反馈对重庆金融环境整体感受较去年变好，政府对实体经济的金融支持力度加大，以及优惠政策落地为企业降低了负担。而部分受访企业不满意的原因主要有：融资手续复杂、融资成本高、融资条件多门槛高、对金融优惠政策不了解、难以享受优惠政策等。

According to the questionnaire feedback, some respondents feedback that the overall feeling of Chongqing's financial environment is better than last year, the financial support of the government for the real economy is increased, and the implementation of preferential policies reduces the burden for enterprises. The main reasons for some respondents' dissatisfaction are: complex financing procedures, high financing costs, high financing conditions, lack of understanding of financial preferential policies, difficulty in enjoying preferential policies, etc.

安永建议 EY Suggestion

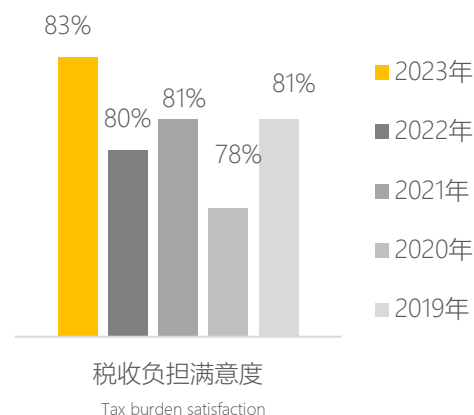
金融政策的支持对企业维持发展至关重要，金融业也是重庆外企集中度较高的行业。安永建议有关部门和银行等金融机构进行协商，制定网络模块化的流程手册，并通过“渝快办”等线上平台进行展示，方便企业了解融资贷款流程和进度；加大优惠政策宣传力度，通过“重庆市政府”微信公众号等平台推送，保证企业能及时了解并享受优惠政策；开设金融优惠政策指导热线，针对企业在融资等金融操作过程中存在的问题进行解读，必要时可以派专员协助企业办理相关事宜。

The support of financial policies is crucial to the maintenance and development of enterprises, and the financial industry is also an industry with high concentration of foreign enterprises in Chongqing. EY recommends that relevant departments and financial institutions such as banks negotiate to formulate a network modular process manual, which can be displayed through online platforms such as "Chongqing Kuaidian Office" to facilitate enterprises to understand the financing and loan process and progress; Strengthen the publicity of preferential policies and push them through platforms such as "Chongqing Municipal Government" WeChat official account to ensure that enterprises can understand and enjoy preferential policies in a timely manner; Set up a financial preferential policy guidance hotline to interpret the problems existing in the financing and other financial operations of enterprises, and send specialists to assist enterprises in handling relevant matters when necessary.

市场环境

Market Environment

税收环境 Tax Environment



2023年有83%的受访企业表示对税收环境满意，达到了近五年最高。得益于减税降费政策大力推进，2023年重庆在税收方面取得了显著成绩，受访企业感受明显，减税降费成效显著。

In 2023, 83% of respondents said they were satisfied with the tax environment, reaching the highest level in nearly five years. Thanks to the vigorous promotion of tax and fee reduction policies, Chongqing has made remarkable achievements in tax aspect in 2023, with obvious feelings from the enterprises interviewed and remarkable results in tax and fee reduction.

2023延续了增值税小规模纳税人减免增值税、小型微利企业所得税优惠政策、生产、生活性服务业增值税加计抵减等政策。结合2023年受访企业反馈来看，企业整体能够感受到税收优惠力度加大，对现行税收政策满意度较高。

In 2023, policies such as VAT reduction and exemption for small-scale VAT taxpayers, preferential income tax policies for small and low-profit enterprises, and VAT deduction for production and living services were continued. Based on the feedback of respondents in 2023, enterprises as a whole can feel the increase of tax incentives, and the satisfaction with the current tax policy is higher.

根据问卷反馈，部分受访企业不满意的原因主要有：税局基层工作人员专业能力有待加强、对相关优惠政策的学习与解读能力有待提高、部分业务仍需线下办理、电子化程度有待提升等。

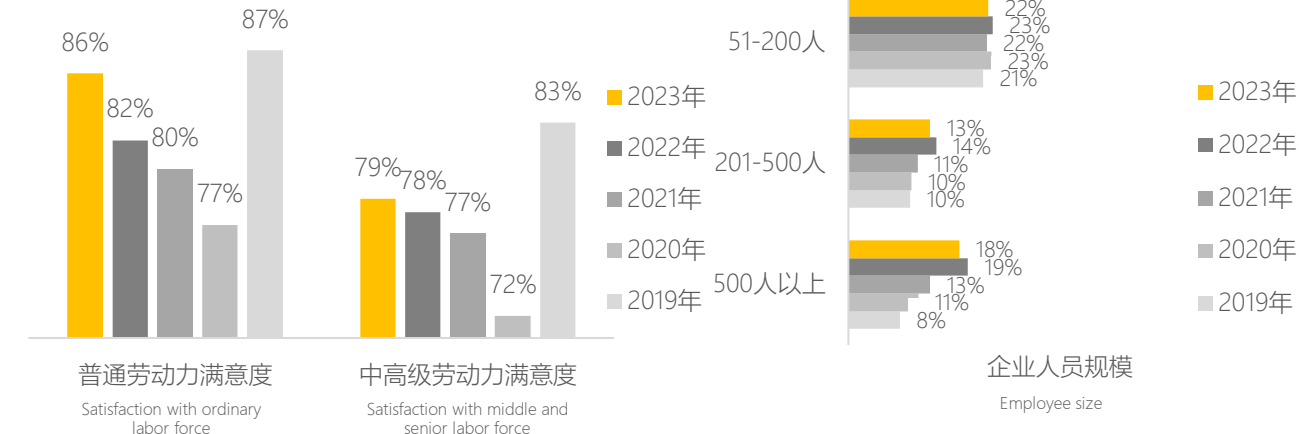
According to the questionnaire feedback, the main reasons for dissatisfaction of some respondents are: the professional ability of grass-roots staff of the tax bureau needs to be strengthened, the ability to learn and interpret relevant preferential policies needs to be improved, some procedures still need to be handled offline, and the degree of electronic needs to be improved.

安永建议 EY Suggestion

税收是国之根本，税收环境健康能在保证国家收入来源的同时，促进企业良性发展。安永建议有关部门加强对税务工作人员的培训，定期开展培训及考评，提高工作人员的业务能力及服务意识，提升纳税人办税体验；加大对税收优惠政策宣传力度，通过电子税务局征纳互动平台等渠道，及时传达税收优惠政策，还可以定期开展税务研讨会等，指导企业享受税收优惠，使企业应享尽享税收优惠；进一步研发电子税务局相关功能，非必要流程尽量实现全线上办理，方便企业办税。

Tax is the foundation of a country, and the healthy tax environment can ensure the source of national income and promote the healthy development of enterprises. EY recommends that relevant departments strengthen the training of tax staff, regularly carry out training and evaluation, improve the business ability and service awareness of staff, and enhance the tax experience of taxpayers; Strengthen the publicity of tax preferential policies, timely convey tax preferential policies through the interactive platform for collection and payment of electronic tax bureaus and other channels, and regularly carry out tax seminars to guide enterprises to enjoy tax preferences so that enterprises should enjoy tax preferences; Further research and development of electronic tax bureau related functions, non-essential processes to achieve the whole line as far as possible.

人力资源环境 Human Resources Environment



2023年分别有86%、79%的受访企业对重庆普通劳动力、中高级劳动力表示满意。受访企业对重庆劳动力的满意度在近五年逐年上升，其中普通劳动力满意度上升最为明显，较2022年上升了4%，已恢复至疫情前水平，表明重庆政府近年在人才发展和人才引进方面发挥了显著作用，劳动力质量不断提高，普通劳动力就业环境预期乐观。

In 2023, 86% and 79% of the respondents were satisfied with the ordinary labor force and the middle and senior labor force in Chongqing. In the past five years, the satisfaction of respondents with Chongqing's labor force has increased year by year, of which the satisfaction of ordinary labor force has increased the most significantly, up 4% from 2022, and has returned to the pre-epidemic level, indicating that the Chongqing government has played a significant role in talent development and talent introduction in recent years, the quality of labor force has been continuously improved, and the employment environment of ordinary labor force is expected to be optimistic.

根据问卷反馈，部分受访企业不满意的原因主要有：高端人才稀缺、缺乏创新型人才、一线人才短缺、人才流失严重等。

According to the questionnaire feedback, the main reasons for dissatisfaction of some respondents are: scarcity of high-end talents, lack of innovative talents, shortage of front-line talents, serious brain drain, etc.

安永建议 EY Suggestion

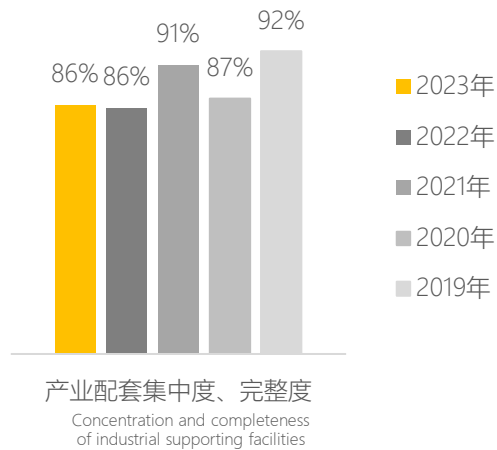
人才对企业来说是重要的战略资源，人力资源的稳定和高质量供应关乎企业的长期发展。安永建议有关部门和重庆高校联合定向培养高端行业人才，同时进一步出台人才相关支持政策，尤其针对高端人才和一线人才，在落户买房等方面给予便利，鼓励人才及家属落户安家；完善人才配套设施，对人才及家属给予医疗、教育等各方面的便利，解决人才后顾之忧，提升人才生活质量；建立人才管理机制，及时掌握人才短缺周期性数据，对此后用工忙季能有预判，提前规划措施聚集人才，避免出现临时性人才短缺。

Talents are important strategic resources for enterprises. The stability and high-quality supply of human resources are related to the long-term development of enterprises. EY recommends that relevant departments and Chongqing universities jointly cultivate high-end industry talents, and further introduce talent related support policies, especially for high-end talents and front-line talents, to facilitate the settlement and purchase of houses, and encourage talents and their families to settle down; Improve the supporting facilities for talents, provide medical and educational facilities for talents and their families, solve the worries of talents and improve the quality of life of talents; Establish a talent management mechanism, timely grasp the periodic data of talent shortage, predict the busy season of employment after this, plan measures in advance to gather talents, and avoid temporary talent shortage.

市场环境

Market Environment

产业配套环境 Industry Supporting Facility Environment



2023年有86%受访企业对重庆市产业配套集中度、完整度表示满意。

In 2023, 86% of the respondents were satisfied with the concentration and completeness of industrial supporting facilities in Chongqing.

近五年调查数据显示，受访企业对历年能源环境满意度总体评价有所波动，但2023年满意度较去年持平。

Survey data in the past five years show that the overall evaluation of energy and environmental satisfaction of the respondents has fluctuated over the years, but the satisfaction in 2023 is the same as last year.

根据问卷反馈，多数企业对产业配套环境表示满意。部分企业认为汽车产业配套环境比较成熟完善；部分企业认为计算机产业也具有较强优势，但比较担心受大环境影响而市场需求不高。

According to the questionnaire feedback, most respondents are satisfied with the supporting environment of the industry. Some respondents believe that the supporting environment of the automobile industry is relatively mature and perfect; Some enterprises believe that the computer industry also has strong advantages, but are more worried about the potential low market demand due to the macro economics.

部分受访企业不满意的原因主要有：产业集中度不高、部分配套产业扶持政策较少等。

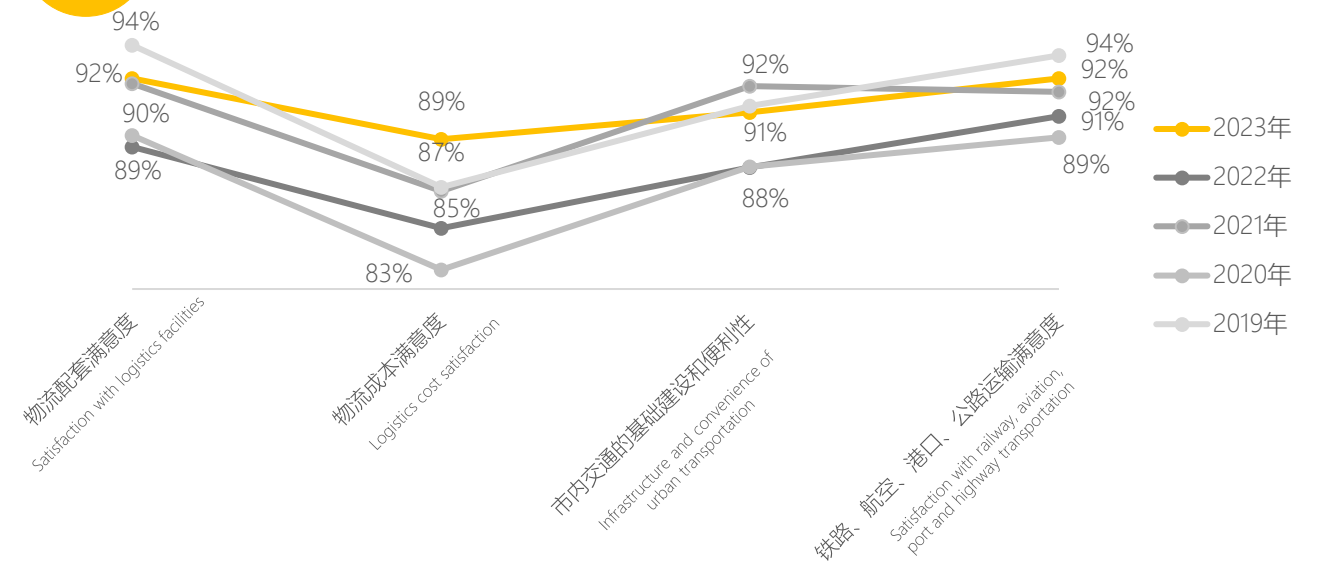
The main reasons for dissatisfaction of some respondents are: low industrial concentration, less supporting policies for some supporting industries, etc.

安永建议 EY Suggestion

作为制造业大国，我国有着产业系统配套完善的供给优势，为了更高水平地吸引外资，更高质量地承载战略性新兴产业链，重庆需着力于打造良好的产业政策环境和空间格局。安永建议有关部门加强招商引资及产业园规划，提高产业集中度，促进产业集群发展；发挥产业集群综合效应，优化配置，提高效率。围绕工业支柱产业，做大做强产业集群；围绕金融、商贸、物流等服务业重点领域，打造服务业集聚区；关注重要产业的配套需求，定向培养或引进配套产业，加大对配套产业相关的政策扶持力度等。

As a large manufacturing country, China has the supply advantage of complete industrial system. In order to attract foreign capital at a higher level and carry strategic emerging industrial chains at a higher quality, Chongqing needs to focus on creating a good industrial policy environment and spatial pattern. EY recommends that relevant departments strengthen investment promotion and industrial park planning, improve industrial concentration and promote the development of industrial clusters; Give full play to the comprehensive effect of industrial clusters, optimize allocation and improve efficiency. Focus on the pillar industries of industry, expand and strengthen industrial clusters; Build a service industry cluster around key areas of service industry such as finance, trade and logistics; Pay attention to the supporting needs of important industries, cultivate or introduce supporting industries in a targeted manner, and increase policy support for supporting industries.

物流环境 Logistics Environment



2023年分别有92%、89%、91%、92%的受访企业对重庆市的物流配套、物流成本、市内交通以及铁路、航空、港口、公路运输表示满意，整体满意度高于2022年。其中，物流成本2023年满意度有明显上升，说明重庆在克服内陆区位、山区地势等方面付出了较大努力，也取得较好成效。

In 2023, 92%, 89%, 91% and 92% of the respondents were satisfied with the logistics support, logistics cost, urban transportation, railway, aviation, port and highway transportation in Chongqing, and the overall satisfaction was higher than that in 2022. Among them, the satisfaction of logistics cost has increased significantly in 2023, indicating that Chongqing has made great efforts to overcome the inland location and mountainous terrain, and has achieved good results.

根据问卷反馈，多数企业认为重庆交通便利，物流配套完善，基础建设良好。而部分受访企业不满意的原因主要有：冷链运输不成熟、物流成本与沿海城市相比较高、水运陆运竞争优势小等。

According to the questionnaire feedback, most respondents believe that Chongqing has convenient transportation, perfect logistics and good infrastructure. The main reasons for dissatisfaction of some respondents are: immature cold chain transportation, higher logistics costs compared with coastal cities, and small competitive advantages of water and land transportation.

安永建议 EY Suggestion

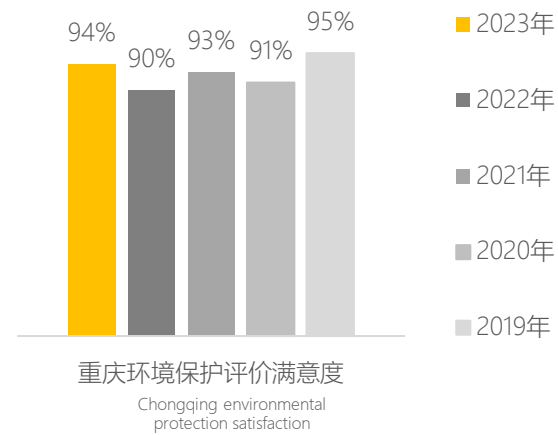
强化现代物流对社会民生的服务保障至关重要，在保障生活物资供应和企业高效运转等方面发挥重要作用。安永建议有关部门继续大力发展多形式物流，构建物流网络枢纽，利用长江黄金水道、丝绸之路经济带、中欧班列（渝新欧）、西部陆海新通道、渝满俄通道等优势，促进物流行业的发展，降低物流成本；发展冷链运输，向顺丰等冷链完善的运输企业汲取经验，积极推进现有运输企业增设冷链业务。

Strengthening modern logistics is crucial to the service guarantee of people's livelihood, and plays an important role in ensuring the supply of living materials and the efficient operation of enterprises. EY recommends that relevant departments continue to vigorously develop multi-form logistics, build logistics network hubs, and make use of the advantages of the Yangtze River Golden Waterway, the Silk Road Economic Belt, the China-Europe Express (Chongqing-Xinjiang-Europe), the Western Land and Sea New Passage, and the Chongqing Manchuria Russia Passage to promote the development of the logistics industry and reduce logistics costs; Develop cold chain transportation, draw experience from transportation enterprises with perfect cold chain such as Shunfeng, and actively promote existing transportation enterprises to add cold chain business.

市场环境

Market Environment

环保建设 Environmental Protection



2023年有94%受访企业对重庆市环境保护表示满意。近五年调查数据显示，受访企业对历年环保环境的满意度均达到90%以上。得益于《重庆市生态环境保护“十四五”规划（2021—2025年）》等政策的出台和落地，重庆近年环境保护效果显著。

In 2023, 94% of the respondents expressed satisfaction with the environmental protection of Chongqing. Survey data in the past five years show that the satisfaction of the respondents with environmental protection over the years has reached more than 90%. Thanks to the introduction and landing of policies such as "the 14th Five-Year Plan for Ecological and Environmental Protection of Chongqing (2021-2025)", Chongqing has achieved remarkable environmental protection results in recent years.

根据问卷反馈，多数企业对环保建设表示满意，认为政府对环保投入大，环保发展趋势良好，环保监督机制日益完善。而受访企业不满意的原因主要有：污染天气应急不及时、环保政策执行有失公允、工地灰尘与噪音控制力度不够、垃圾分类处理有待改善等。

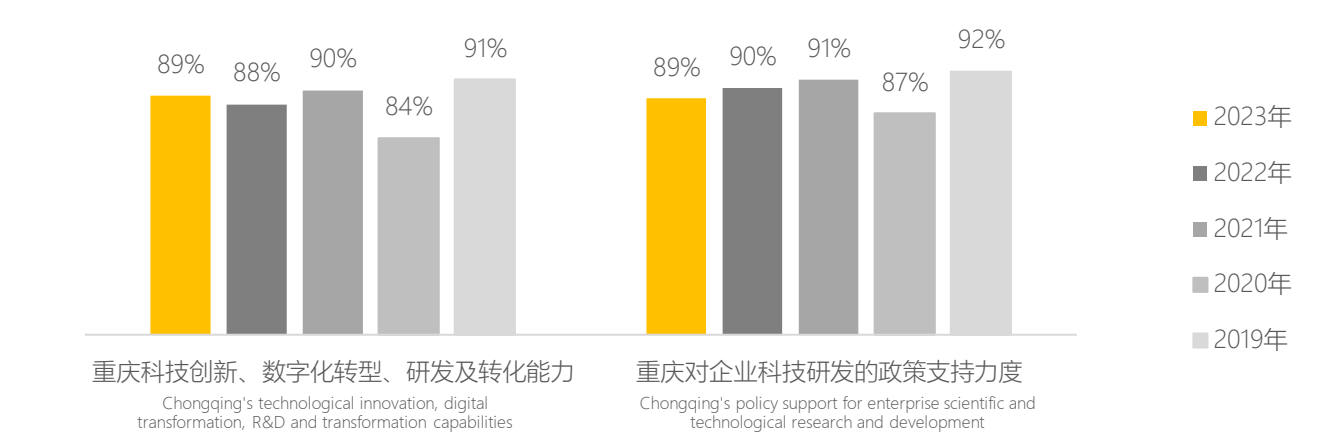
According to the questionnaire feedback, most respondents are satisfied with the development of environmental protection, believing that the government has invested heavily in environmental protection, the development trend of environmental protection is good, and the environmental protection supervision mechanism is becoming increasingly perfect. The main reasons for the dissatisfaction of the respondents are: untimely emergency response to polluted weather, unfair implementation of environmental protection policies, insufficient dust and noise control at the construction site, and the improvement of waste classification and treatment.

安永建议 EY Suggestion

“绿水青山才是金山银山”，环保建设关乎企业与国家的长远发展。安永建议有关部门制定科学的污染天气应急方案，并进行日常演练，以确保能顺利应对严重污染天气；在环保政策执行过程中，要保证执行的公平性，加强对执法人员的培训，保证对政策的理解和执行统一；开通反馈热线，发挥群众监督的作用；加强对工地施工的监督管理，构建完善的监督机制，可分配专员对前期施工的审批和报备、中期工地施工的监督、工地的完工验收进行全流程监督，保证责任落实到人，并在期间对施工场地进行不定期检查，对于未按规定施工的工地进行记录，及时反馈给负责企业进行整改；加大垃圾分类政策执行力度，加强垃圾分类宣传教育，在各社区开展宣传活动，可对表现好的企业、社区、居民进行评优奖励，促使大众养成垃圾分类的习惯。

"Green water and green mountains are the golden mountains and silver mountains", and environmental protection construction is related to the long-term development of enterprises and the country. EY recommends that relevant authorities develop scientific emergency plans for polluted weather and conduct daily drills to ensure smooth response to severe polluted weather; In the process of implementing environmental protection policies, we should ensure the fairness of implementation, strengthen the training of law enforcement personnel, and ensure the unity of policy understanding and implementation; Open a feedback hotline and give full play to the role of mass supervision; Strengthen the supervision and management of site construction, build a perfect supervision mechanism, assign specialists to supervise the whole process of construction, ensure that the responsibility is implemented to people, conduct irregular inspection on the construction site during the period, record the construction sites that fail to comply with the regulations, and timely feed back to the responsible enterprise for rectification; Strengthen the implementation of garbage classification policies, strengthen garbage classification publicity and education, and carry out publicity activities in communities, which can evaluate and reward enterprises, communities and residents who perform well, and promote the public to develop the habit of garbage classification.

科技环境 Scientific and Technological Environment



2023年有89%、89%的受访企业对重庆科技创新、数字化转型、研发及转化能力及重庆对企业科技研发的政策支持力度满意，整体满意度与2022年持平。

In 2023, 89% and 89% of the respondents were satisfied with Chongqing's scientific and technological innovation, digital transformation, R&D and transformation capabilities and Chongqing's policy support for enterprise scientific and technological research and development. Overall satisfaction was the same as in 2022.

根据问卷反馈，多数企业对科技环境表示满意，认为重庆科技环境发展良好。而部分受访企业不满意的原因主要有：高新技术企业认定难度高、民间对新技术接纳程度仍趋保守、技术人才较为稀缺等。

According to the questionnaire feedback, most respondents are satisfied with the scientific and technological environment, believing that Chongqing's scientific and technological environment is developing well. The main reasons for some respondents' dissatisfaction are: the difficulty of identifying high-tech enterprises, the conservative acceptance of new technologies by the people, and the scarcity of technical talents.

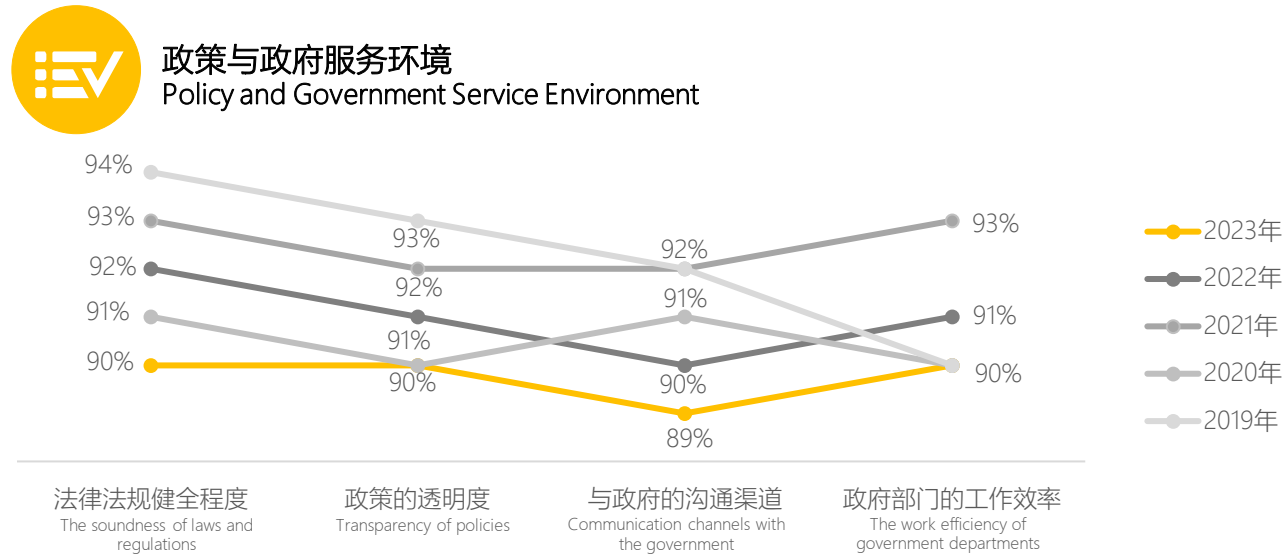
安永建议 EY Suggestion

“科技兴国、科技强国”，科技不仅是企业发展的制胜法宝，更是国家实力的体现。安永建议有关部门进一步出台科技支持政策，继续鼓励高新技术企业发展，在税收、研发资金和场地等方面给予支持；针对性地对企业进行高新技术企业认定进行辅导，开设咨询热线，解答企业困惑，帮助企业应享尽享高新技术企业税收优惠；并在电子税务局征纳互动平台、“渝快办”等平台上公布高新技术企业认定条件及申请所需材料；加大对新技术的科普力度，通过官方社交平台进行宣传，降低普通群众对高新技术的了解门槛，提高居民科学涵养；对接重点科技企业，了解其对技术人才的需求，针对性地制定人才引进计划。

Science and technology is not only the magic weapon of enterprise development, but also the embodiment of national strength. EY recommends that relevant departments further introduce science and technology support policies, continue to encourage the development of high-tech enterprises, and provide support in tax, R&D funds and venues; Targeted guidance for enterprises to identify high-tech enterprises, set up a consultation hotline, answer the confusion of enterprises, and help enterprises enjoy the preferential tax treatment for high-tech enterprises; And publish the conditions for the identification of high-tech enterprises and the materials needed for application on the interactive platform for collection and payment of electronic tax bureaus, the "Chongqing Kuaidai Office" and other platforms; Strengthen the science popularization of new technologies, publicize through official social platforms, reduce the threshold for ordinary people to understand new technologies, and improve the scientific cultivation of residents; Connect with key science and technology enterprises, understand their needs for technical talents, and formulate talent introduction plans accordingly.

政策与政府服务环境

Policy and Government Service Environment



调查结果显示，受访企业对政策与政府服务环境近五年满意度总体评价较高，基本达到90%以上，但2023年受访企业对各项因素满意度回落至近五年最低，与2022年相比，各因素的满意度下降1%-2%。

The survey results show that the overall evaluation of the satisfaction of the respondents with policies and government service environment in the past five years is relatively high, basically reaching more than 90%, but in 2023, the satisfaction of the respondents with various factors fell back to the lowest level in the past five years, and compared with 2022, the satisfaction of various factors decreased by 1% -2%.

根据问卷反馈，部分受访企业反映个别基层人员的效率与工作能力有待提高，尤其是需要多部门协作处理的事务办理较慢，同时希望政府公布的普惠政策的办理能更加简化，减少申报认证等的所需材料和时间。

According to the questionnaire feedback, some respondents reflect that the efficiency and working ability of individual grass-roots personnel need to be improved, especially the slow processing of affairs that need to be handled by multi-sectoral cooperation. At the same time, they hope that the processing of inclusive policies announced by the government can be more simplified, and the materials and time required for declaration and certification can be reduced.

安永建议 EY Suggestion

建议重庆市政府加强法律法规的制定和完善，确保法律体系的完备性和一致性；加强法律的宣传和普及工作，提高企业对法律的认知和遵守度；建议政府加强政策的公开透明度，提高政策的可预测性和稳定性，让企业更好地了解政府的政策方向和措施；建立政策评估机制，及时调整政策以适应社会发展的需要；建议政府建立多元化的沟通渠道，包括线上和线下的方式，让企业更便捷地向政府反映问题和建议；建立有效的回应机制，及时处理企业反馈的问题，增强政府与企业之间的互动和信任；建议政府部门加强内部协调和合作，优化工作流程和提高工作效率；加强公务员队伍建设，提高公务员的专业素养和服务意识，为企业提供更优质的服务。

It is suggested that Chongqing Municipal Government should strengthen the formulation and improvement of laws and regulations to ensure the completeness and consistency of the legal system; Strengthen the publicity and popularization of laws, and improve the awareness and compliance of enterprises with laws; It is suggested that the government should strengthen the openness and transparency of policies, improve the predictability and stability of policies, and let enterprises better understand the policy direction and measures of the government; Establish a policy evaluation mechanism and adjust policies in a timely manner to meet the needs of social development; It is suggested that the government should establish diversified communication channels, including online and offline ways, so that enterprises can more easily reflect problems and suggestions to the government; Establish an effective response mechanism, deal with the feedback of enterprises in a timely manner, and enhance the interaction and trust between the government and enterprises; It is suggested that government departments should strengthen internal coordination and cooperation, optimize work processes and improve work efficiency; Strengthen the construction of the civil service team, improve the professional quality and service awareness of civil servants, and provide better services for enterprises.

生活环境

Living Environment



调查结果显示，受访企业对生活环境整体评价较高。2023年有94%受访企业对生活环境表示满意，达到近五年最高水平，说明重庆近几年城市生活质量持续提升。但医疗卫生、文化氛围、教育水平、语言环境满意度相较其他因素仍旧排名偏低。

The survey results show that the respondents have a high overall evaluation of the living environment. In 2023, 94% of the respondents expressed satisfaction with the living environment, reaching the highest level in the past five years, indicating that the quality of life in Chongqing has continued to improve in recent years. However, health care, cultural atmosphere, education level and language environment satisfaction are still lower than other factors.

根据问卷反馈，部分企业反映物价水平偏高；空气质量有待提升；城市周边地区交通不便；文娱体育类活动欠缺等问题需引起重视。

According to the questionnaire feedback, some respondents reflect that the price level is on the high side; Air quality needs to be improved; Poor transportation around the city; The lack of cultural and sports activities should be paid attention to.

安永建议 EY Suggestion

建议重庆市政府在支持本地方言和文化的同时，加强推广普通话教育，提高市民的语言能力和沟通效率；提供更多的语言培训资源，帮助市民提升普通话以及外语水平，适应全球化的发展趋势；加大对教育事业的投入，提高教育资源的均衡性和质量；推动教育改革，注重学生综合素质的培养，促进教育公平和可持续发展；加强文化产业的支持和发展，丰富文化产品和服务供给；举办更多的文化活动和交流，促进文化多样性和交流互动，营造浓厚的文化氛围；加强医疗卫生系统建设，提高医疗资源配置和服务水平；推动医疗技术和管理水平的提升，提高医疗服务的效率和质量，保障市民的健康权益；加强市场监管，维护市场秩序，防止价格恶性竞争和垄断行为；加强物价监测和调控，确保商品价格的合理性和透明度，保障市民的消费权益。

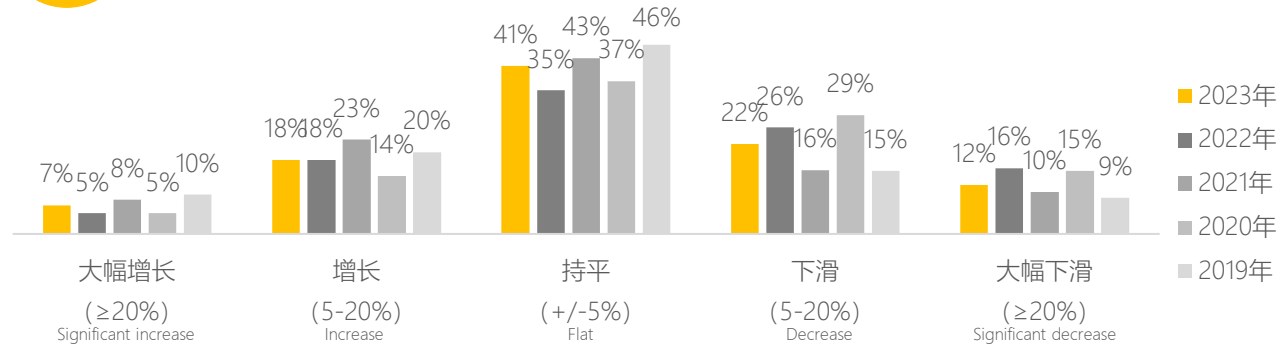
It is suggested that Chongqing Municipal Government should strengthen the promotion of Putonghua education while supporting local dialects and culture, so as to improve the language ability and communication efficiency of citizens; Provide more language training resources to help citizens improve their Mandarin and foreign language skills and adapt to the trend of globalization; Increasing investment in education and improving the balance and quality of educational resources; Promote educational reform, pay attention to the training of students' comprehensive quality, and promote the fair and sustainable development of education; Strengthen the support and development of cultural industries and enrich the supply of cultural products and services; Organize more cultural activities and exchanges, promote cultural diversity and interaction, and create a strong cultural atmosphere; Strengthen the construction of the medical and health system and improve the allocation of medical resources and service level; Promote the improvement of medical technology and management level, improve the efficiency and quality of medical services, and protect the health rights and interests of citizens; Strengthen market supervision, maintain market order, and prevent vicious price competition and monopolistic behavior; We will strengthen price monitoring and control, ensure the reasonableness and transparency of commodity prices, and protect the consumer rights and interests of citizens.

企业发展

Enterprise Development



较前一年度的营业收入增减情况
Increase or Decrease in Operating Income from Prior Year

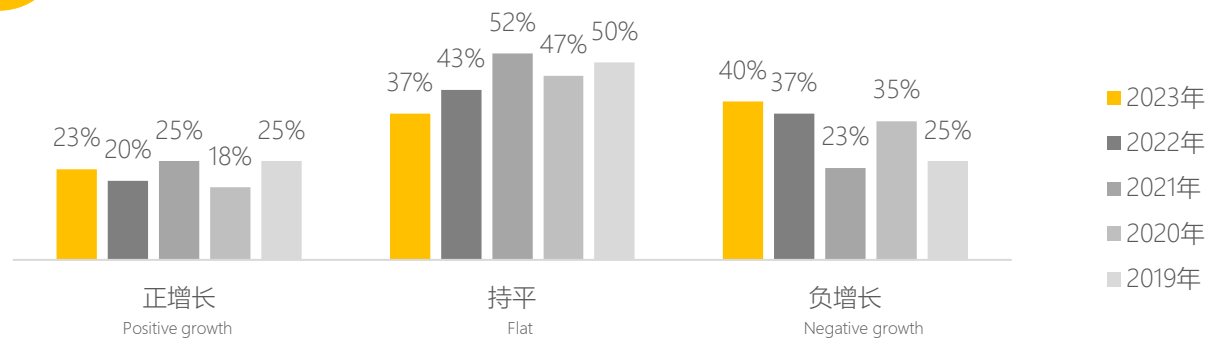


调查结果显示，41%的受访企业表示其2023年营业收入较2022年持平，25%的受访企业表示有增长，但36%的受访企业表示有下降，整体表现差强人意，这主要是受宏观环境不景气和需求下降的影响。但值得欣慰的是，表示营业收入下降的企业占比从2022年的42%缓解至36%，这说明收入下降的势头在减缓。

The survey results show that 41% of the respondents said that their operating income in 2023 was flat compared with 2022, 25% of the respondents said that they had increased, but 36% of the respondents said that they had declined, and the overall performance was not good, mainly due to the sluggish macro environment and declining demand. However, it is gratifying that the proportion of enterprises indicating declining operating income has eased from 42% in 2022 to 36%, indicating that the momentum of revenue decline is slowing down.



较前一年度的净利润增减情况
Increase or Decrease in Net Profit from Prior Year

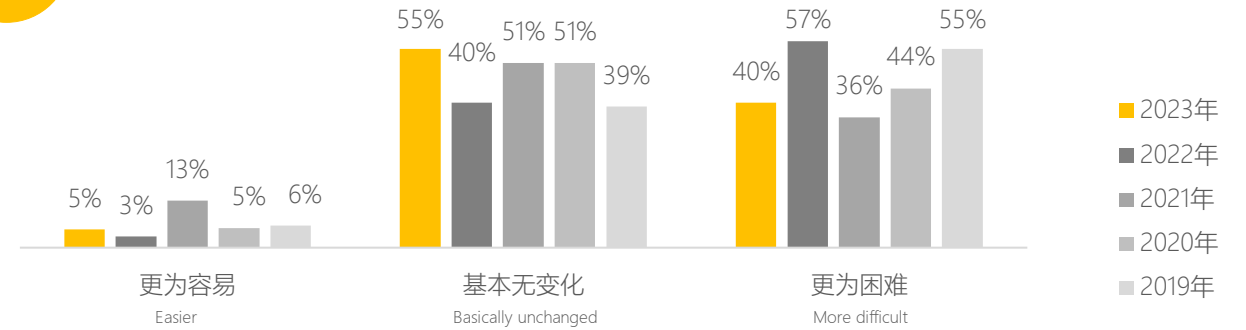


调查结果显示，40%的受访企业净利润较2022年下降。通常可能会有两个因素影响：一方面是企业在控制成本费用方面可能面临挑战，另一方面企业营业收入不增反降可能难以维持较高的固定成本。表示2023年利润增加和利润减少的企业都在增加，但是表示利润持平的企业却在减少，这种“两头起中间降”的态势，也反映出当前大环境下不同企业抵御风险的能力不同。相较于控制成本，安永更加建议重庆政府出台刺激消费和引领需求的政策，形成“慢牛”态势。

The survey results show that 40% respondents said that their net profit declined in 2023. There are usually two factors that may affect this: (1) enterprises may face challenges in controlling costs and expenses, and (2) it may be difficult for enterprises to maintain high fixed costs without increasing their operating income. Enterprises that show profit increase and profit decrease in 2023 are increasing, but enterprises that show flat profits are decreasing. This trend of "from both ends to the middle" also reflects the different ability of different enterprises to resist risks in the current macro economics. Compared with cost control, EY more recommends that the Chongqing government introduce policies to stimulate consumption and lead demand, form a steady growth trend.



较前一年度的经营难易程度
Operating Difficulty Compared with Prior Year

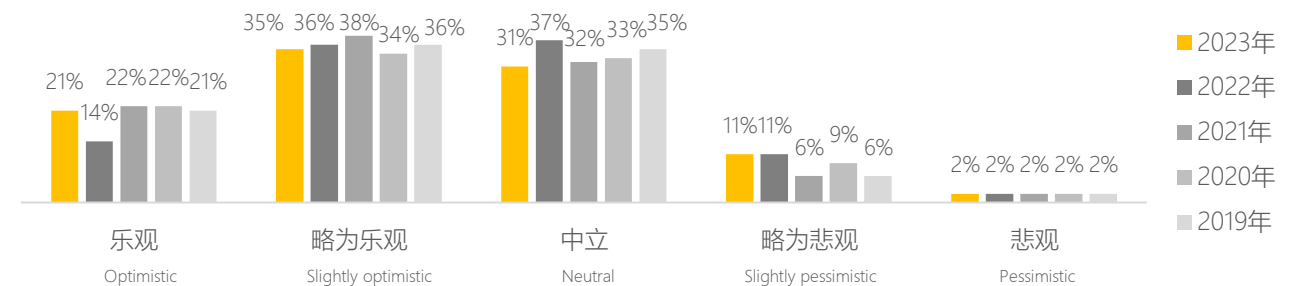


调查结果显示，55%的受访企业表示其2023年经营难以程度较2022年持平，40%的受访企业表示更难，仅有5%的受访企业表示更容易。但值得欣慰的是，表示更难的企业占比从2022年的57%缓解至40%，这说明尽管企业信心在逐步恢复。

The survey results show that 55% of the respondents said that their operating difficulties in 2023 were the same as in 2022, 40% of the respondents said that it was more difficult, and only 5% of the respondents said that it was easier. However, it is gratifying that the proportion of enterprises that say it is more difficult has eased to 40% from 57% in 2022, indicating that business confidence is gradually recovering.



未来两年在重庆发展前景的预期
Outlook for Future Development in Chongqing over the Next Two Years



调查结果显示，56%的受访企业对重庆未来两年的发展预期持乐观态度。2023年持乐观态度的受访企业占比比较2022年增加7%。这表明企业对重庆市场的增长潜力和商业环境持乐观态度。这种乐观情绪可能受到市场需求增长、政策支持、产业环境等因素的推动，使企业看好未来在重庆的发展机会。

The survey results show that 56% respondents are optimistic about Chongqing's development expectations in the next two years. The proportion of respondents with an optimistic attitude in 2023 increased by 7% compared with 2022. This shows that enterprises are optimistic about the growth potential and business environment of Chongqing market. This optimism may be driven by market demand growth, policy support, industrial environment and other factors, so that enterprises are optimistic about future development opportunities in Chongqing.

企业发展

Enterprise Development



在重庆生产经营面临的主要挑战 Key Challenges of Business Operation in Chongqing



调查结果显示，全球经济/中国经济增速放缓、订单减少、劳动力成本提高、原材料成本上升是受访企业2023年在生产经营中面临的主要挑战。

The survey results show that slowing global/Chinese economic growth, reduced orders, higher labor costs and rising raw material costs are the main challenges of business operation in Chongqing in 2023.

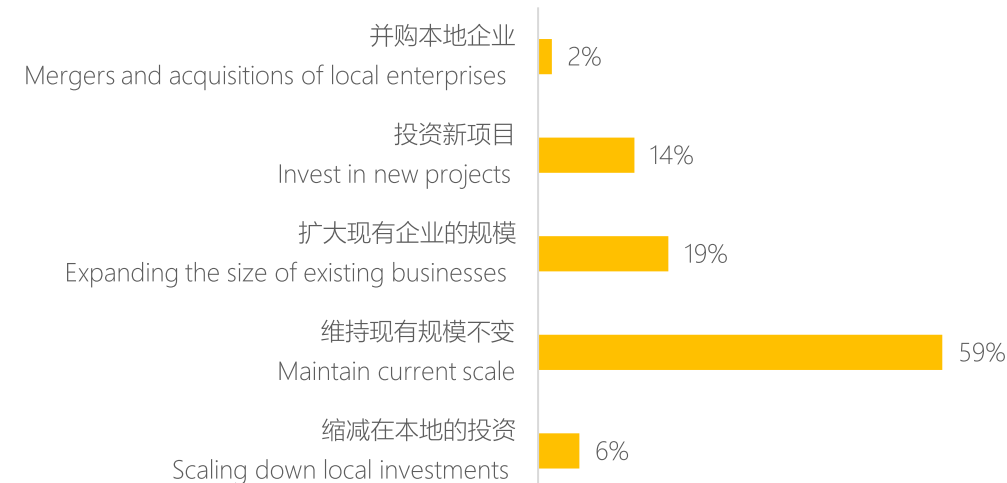
安永建议 EY Suggestion

建议重庆市政府制定支持政策，鼓励企业加强技术创新、产品升级，增强企业的核心竞争力，提高企业的抗风险能力；加强市场调研，推动企业拓展多元化客户群体，提高企业订单的多样性和稳定性；促进产业链上下游企业的合作与协同发展，优化产业布局，提高产业链整体竞争力，降低企业单一环节风险；优化人才政策，通过培训补贴、人才引进政策等措施，帮助企业提升员工技能，提高劳动生产率，降低人力成本；推动企业以及政府与原材料供应商的合作，确保企业原材料供应的稳定性，降低原材料成本波动对企业的影响；加强市场监管，打击价格垄断和不正当竞争行为，维护市场秩序，保障企业合法权益；支持本土企业提升技术水平、品牌知名度，加强产业协同合作，促进企业间资源共享优势互补，提高本土企业的市场竞争力。

It is suggested that the Chongqing Municipal Government should formulate supporting policies to encourage enterprises to strengthen technological innovation and product upgrading, enhance the core competitiveness of enterprises and improve their ability to resist risks; Strengthen market research, promote enterprises to expand diversified customer groups, and improve the diversity and stability of enterprises' orders; Promote the cooperation and coordinated development of upstream and downstream enterprises in the industrial chain, optimize the industrial layout, improve the overall competitiveness of the industrial chain, and reduce the risk of a single link of enterprises; Optimize the talent policy, help enterprises improve staff skills, improve labor productivity and reduce labor costs through training subsidies, talent introduction policies and other measures; Promote the cooperation between enterprises and governments and raw material suppliers, ensure the stability of raw material supply for enterprises, and reduce the impact of raw material cost fluctuations on enterprises; Strengthen market supervision, crack down on price monopoly and unfair competition, maintain market order and protect the legitimate rights and interests of enterprises; Support local enterprises to improve their technological level and brand awareness, strengthen industrial collaboration and cooperation, promote resource sharing and complementary advantages among enterprises, and improve the market competitiveness of local enterprises.



未来在重庆的投资意向 Future Investment Plans in Chongqing



调查结果显示，59%受访企业计划未来维持现有规模不变，而仍有35%受访企业计划扩大投资规模、投资新项目或并购本地企业，仅6%受访企业表示可能会缩减本地投资。大部分企业对当前的经济环境持谨慎态度，更偏向于选择保持稳定并观望市场发展。但仍有不少受访企业对重庆市的投资意向持积极态度，也反映了重庆市在吸引外部投资和促进企业发展方面取得了一定成就。

According to the survey results, 59% of the respondents plan to maintain their current scale in the future, while 35% of the respondents plan to expand their investment scale, invest in new projects or acquire local enterprises, and only 6% of the respondents say they may reduce their local investment. Most enterprises are cautious about the current economic environment, preferring to choose to maintain stability and wait and see market development. However, there are still many enterprises interviewed who have a positive attitude towards Chongqing's investment intention, which also reflects that Chongqing has made certain achievements in attracting external investment and promoting enterprise development.

安永建议 EY Suggestion

建议政府针对企业提供定制化支持：针对计划维持现有规模的企业，政府可以提供定制化的支持措施，例如降低税负、简化审批程序、提供培训和技术支持，帮助它们提高效率、降低成本，保持竞争力。优化投资环境：为计划扩大投资规模的企业，政府可以进一步优化投资环境，降低投资门槛、提高透明度，吸引更多资金和人才流入，推动企业扩张和新项目投资。提供风险保障：针对那些计划扩大投资规模的企业，政府可以提供风险保障机制，如贷款担保、投资补贴等，帮助它们降低扩张风险，鼓励更多企业勇于投资扩张。加强政策宣传：针对整体积极投资意向，政府可以加强对投资政策的宣传和解读，让更多企业了解到政府的支持政策和措施，激发更多企业的投资热情。

It is recommended that the government provide customized support for enterprises: For enterprises planning to maintain their current scale, the government can provide customized support measures, such as reducing tax burden, simplifying approval procedures, providing training and technical support to help them improve efficiency, reduce costs and maintain competitiveness. Optimizing the investment environment: For enterprises planning to expand their investment scale, the government can further optimize the investment environment, reduce the investment threshold, improve transparency, attract more capital and talent inflows, and promote enterprise expansion and new project investment. Provide risk protection: For enterprises planning to expand their investment scale, the government can provide risk protection mechanisms, such as loan guarantees and investment subsidies, to help them reduce the risk of expansion and encourage more enterprises to invest in expansion. Strengthen policy publicity: In view of the overall positive investment intention, the government can strengthen the publicity and interpretation of investment policies, so that more enterprises can understand the government's support policies and measures, and stimulate more enterprises' investment enthusiasm.

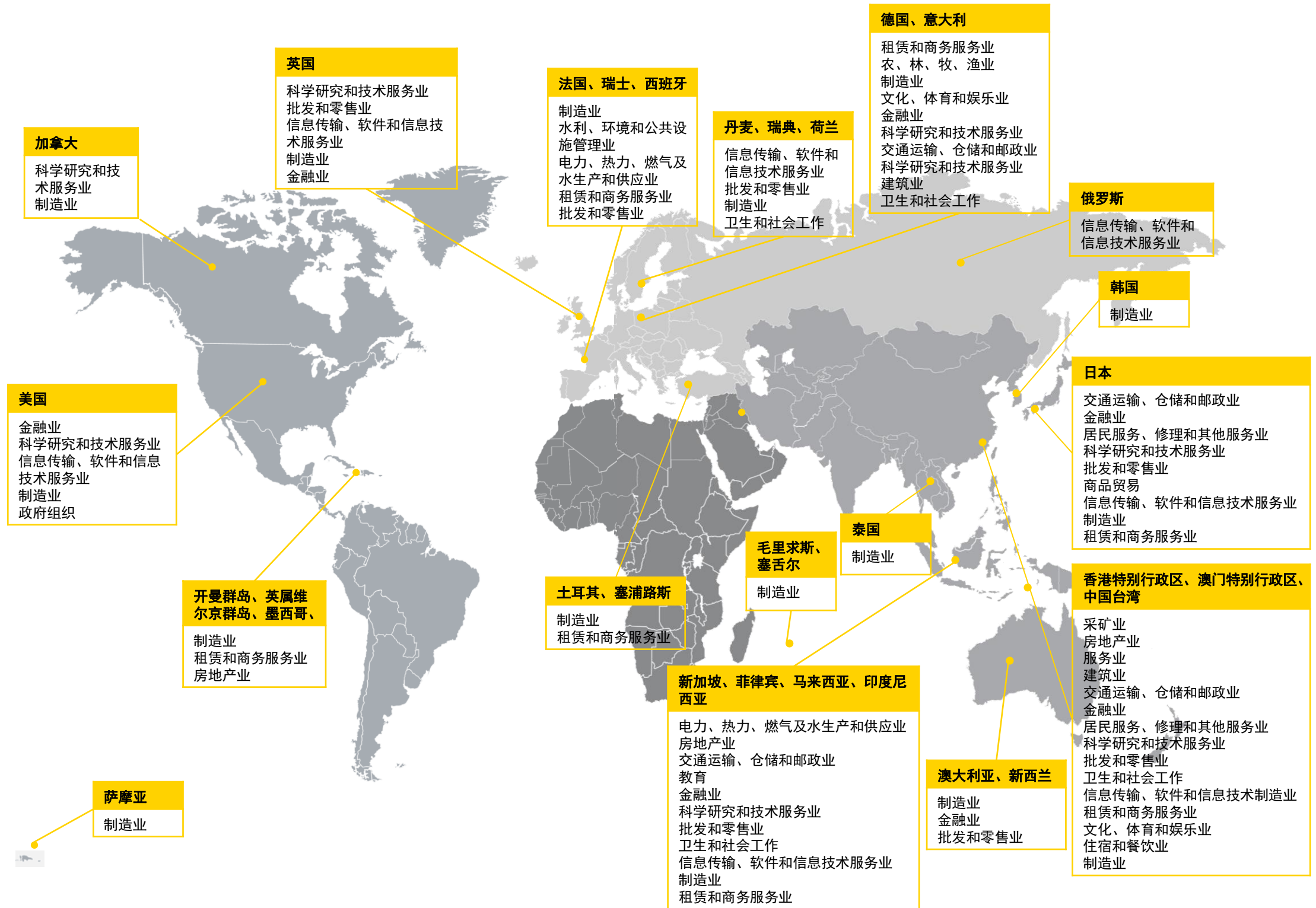
外商投资企业投资母国及地区的来源地图

Map for Home Countries (Regions) of Foreign-invested Enterprises



安永根据受访企业反馈的调查问卷，整理制作了重庆市外商投资企业投资母国及地区的来源地图。如本页地图所示，投资方大量集中在香港特别行政区、新加坡、美国、日本、韩国、中国台湾、德国等发达国家或地区，涵盖了制造、租赁和商务服务、批发和零售、房地产、信息与技术、金融、住宿餐饮等行业。有部分企业的投资者来自东南亚、中东、澳大利亚、非洲等地区，也有投资者以开曼群岛、英属维尔京群岛等低税率地区作为投资平台的设立地点。

Based on the survey, EY compiled a map for home countries (regions) of foreign-invested enterprises. As shown on the map, a great number of investors are from Hong Kong, Singapore, the United States, Japan, Republic of Korea, Taiwan, Germany and other developed countries (regions), engaging in various industries such as manufacturing, leasing and commercial services, wholesale and retail, real estate, IT, financial, accommodation and catering, etc. Some investors come from Southeast Asia, the Middle East, Australia, Africa and other regions. Some investors also set up investment platforms in low-tax areas such as the Cayman Islands and the British Virgin Islands.



测评结果特点分析

Analysis of Characteristics of the Survey

特点一

Feature 1

2023年整体满意度的形态与历史趋同，但较2022年有所提升，其中生活环境提高最多（提升了4%）。

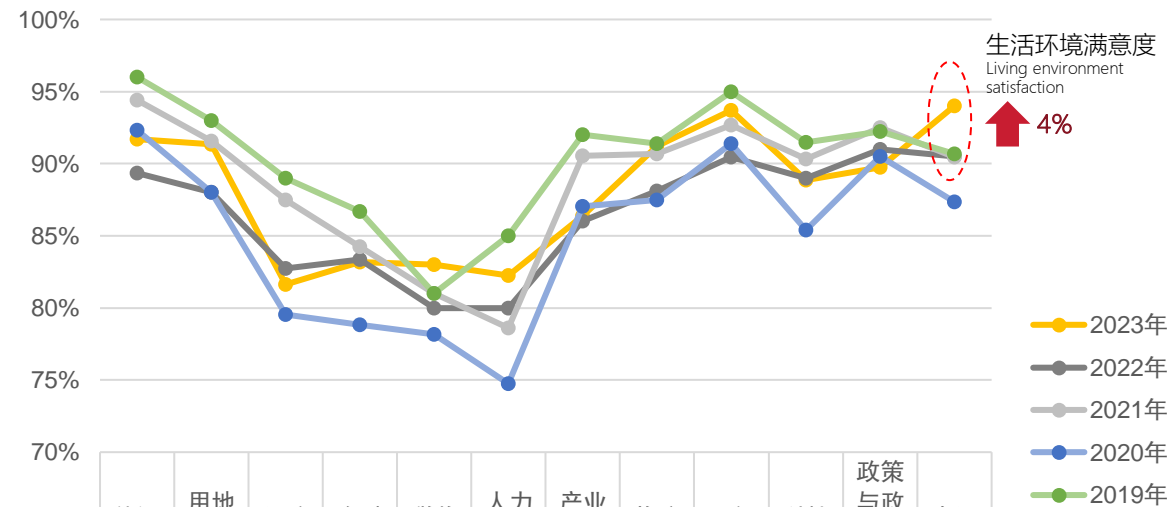
The pattern of 2023 overall satisfaction is similar to that of history, but it has improved compared with 2022, with the living environment improving the most.

- ▶ 满意度较高的环境依然为能源环境、用地用房环境、环保环境、物流环境、政策与政府服务环境、生活环境；

The environment with high satisfaction is still energy environment, land and housing environment, environmental protection environment, logistics environment, policy and government service environment, and living environment;

- ▶ 满意度待提高的环境依然为经济环境、金融环境、税收环境、人力资源环境。

The environment to be improved in satisfaction is still the economic environment, financial environment, tax environment and human resources environment.



	能源环境	用地用房环境	经济环境	金融环境	税收环境	人力资源环境	产业配套环境	物流环境	环保环境	科技环境	政策与政府服务环境	生活环境
2023年	92%	91%	82%	83%	83%	82%	86%	91%	94%	89%	90%	94%
2022年	89%	88%	83%	83%	80%	80%	86%	88%	90%	89%	91%	91%
2021年	94%	92%	87%	84%	81%	79%	91%	91%	93%	90%	93%	90%
2020年	92%	88%	80%	79%	78%	75%	87%	87%	91%	85%	91%	87%
2019年	96%	93%	89%	87%	81%	85%	92%	91%	95%	92%	92%	91%

图：近五年各项环境指标变化情况
Trends of environmental indicators in the past five years

测评环境 — 大类	测评环境 — 子类	2023年较2022年 满意度上升百分比 Satisfaction compared with 2022
要素环境 Fundamental Environment	能源环境 Energy Environment	2%
	用地用房环境 Land and Property Environment	3%
市场环境 Market Environment	经济环境 Economic Environment	-1%
	金融环境 Financial Environment	0%
	税收环境 Tax Environment	3%
	人力资源环境 Human Resources Environment	2%
	产业配套环境 Industry Supporting Facility Environment	0%
	物流环境 Logistics Environment	3%
	环保环境 Environmental Protection	3%
	科技环境 Scientific and Technological Environment	0%
政策与政府服务 Policies and Government Services Environment	-1%	
生活环境 Living Environment	4%	

我们认为，之所以受访企业在生活环境满意度显著提高，是因为重庆近年来在打造宜居城市角度很下功夫，不仅积极改善生活环境（例如民生工程、教育医疗等），而且还在全国乃至全球范围内形成了很好的宣传氛围，提高了重庆居民的幸福感和自豪感。

We believe that the reason why the respondents' satisfaction with the living environment has increased significantly is that Chongqing has made great efforts to build a livable city in recent years, not only actively improving the living environment (such as livelihood projects, education and health care), but also forming a good publicity atmosphere throughout the country and even around the world, which has improved the happiness and pride of Chongqing residents.

作为全国首批营商环境创新试点6大城市之一，近年来，重庆先后出台了一系列优化营商环境的文件，加快打造优质有序的市场环境、高效便捷的政务环境。

As one of the six major cities in the first batch of business environment innovation pilot projects in China, Chongqing has issued a series of documents to optimize the business environment in recent years, accelerating the creation of a high-quality and orderly market environment and an efficient and convenient government environment.

安永根据问卷反馈结果，从行业 and 人员规模两个维度进行了深入透视分析，结果显示：

EY conducted in-depth perspective analysis from two dimensions of industry and personnel scale according to the questionnaire feedback results, and the results showed that:

- ▶ 从行业角度出发，结果基本呈平均分布，即各个行业的受访企业评价满意度基本一致。
From the perspective of industries, the results are basically evenly distributed, that is, the evaluation satisfaction of enterprises interviewed in various industries is basically the same.
- ▶ 从人员规模角度出发，规模为50人及以下的企业（我们称之为“中小微企业”）满意度相对较低。以经济环境和人力资源环境为例，中小微企业占全部受访企业比重为46%，但在对经济环境表示满意受访企业中，中小微企业权重为14%，而大型企业权重为86%。在对人力资源环境表示满意受访企业中，中小微企业权重为15.4%，而大型企业权重为84.6%。这是因为中小微企业自身抵御风险的能力不足，受到的社会关注更少。安永建议，重庆各部门多听取中小微企业诉求，对其发展进行适度指导。
From the perspective of personnel size, the satisfaction of enterprises with 50 people and below (we call them "small and medium-sized enterprises") is relatively low. Taking the economic environment and human resources environment as an example, small and medium-sized enterprises accounted for 46% of the total respondents, but among the respondents who expressed satisfaction with the economic environment, the weight of small and medium-sized enterprises was 14%, while the weight of large enterprises was 86%. Among the respondents who expressed satisfaction with the human resources environment, the weight of small and medium-sized enterprises was 15.4%, while the weight of large enterprises was 84.6%. This is because small and medium-sized enterprises have insufficient ability to resist risks and receive less social attention. EY suggests that authorities in Chongqing shall pay more attention to the demands of small and medium-sized enterprises and provide appropriate guidance for their development.

测评结果特点分析

Analysis of Characteristics of the Survey

特点二

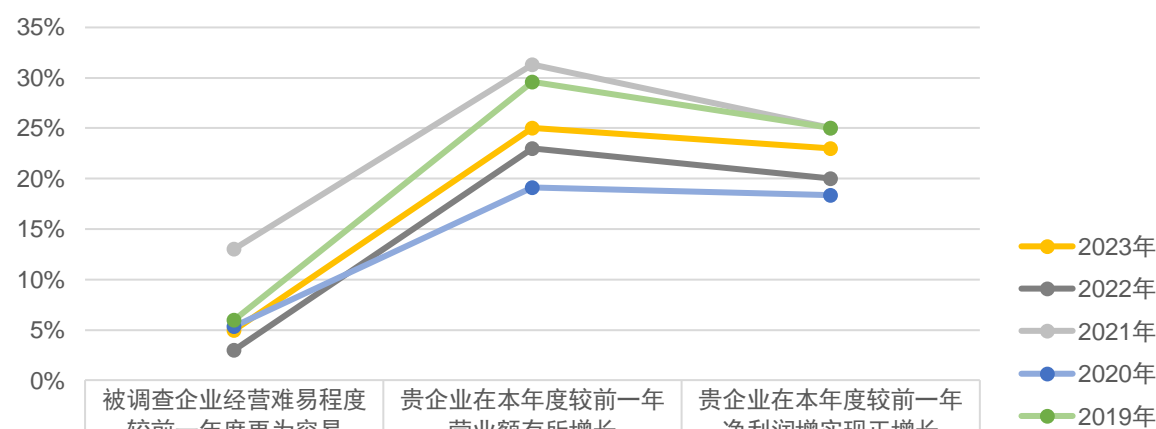
Feature 2

2023年企业经营信心和经营状况依然不容乐观，但与2022年相比，呈现出逐步企稳的态势。在投资意向方面，本次测评中有六成受访企业选择趋于观望（处于高位），但值得欣慰的是依然有35%受访企业保有进一步投资热情。

In 2023, the business confidence and operating conditions of enterprises are still not optimistic, but compared with 2022, they show a gradual stabilization trend. Regarding the future investment plan, 60% of the respondents choose to wait and see, but it is gratifying that 35% of the respondents still have future investment enthusiasm.

回顾过去五年的测评结果，受访企业2020年的经营信心和经营状况较2019年出现明显下跌，这主要是受2020年新冠疫情爆发影响所致。2021年得益于中国疫情管控得力和全球对中国产品需求的依赖，受访企业经营信心和经营状况反而大幅上升。但到了2022年，新冠疫情的封控影响和全球经济的预期下降再度冲击受访企业的经营信心和经营状况。不过我们从2023年的测评结果看到，受访企业的经营信心正在恢复。

Based on the survey of the past five years, it appears that the respondents' the business confidence and business operation in 2020 declined significantly compared with 2019, mainly due to the impact of the COVID-19 outbreak in 2020. In 2021, thanks to the effective control of the epidemic in China and the global dependence on the demand for Chinese products, the respondents' business confidence and business operation increased significantly. However, in 2022, business confidence and business operation were adversely impacted again due to the impact of COVID-19 containment and the decline in global economic expectations. However, we can see that their 2023 business confidence is gradually recovering.



年份	被调查企业经营难易程度较前一年度更为容易	贵企业在本年度较前一年营业额有所增长	贵企业在本年度较前一年净利润增实现正增长
2023年	5%	25%	23%
2022年	3%	23%	20%
2021年	13%	31%	25%
2020年	5%	19%	18%
2019年	6%	30%	25%

Respondents indicated that their business operation were easier than prior year

Respondents indicated that their revenue were increased compared with prior year

Respondents indicated that their profit were increased compared with prior year

与此同时，中国政府和重庆政府也出台了一系列支持政策，包括税收优惠、减轻企业负担、简化审批流程等措施，为企业营造了更加良好、宽松的经营环境。

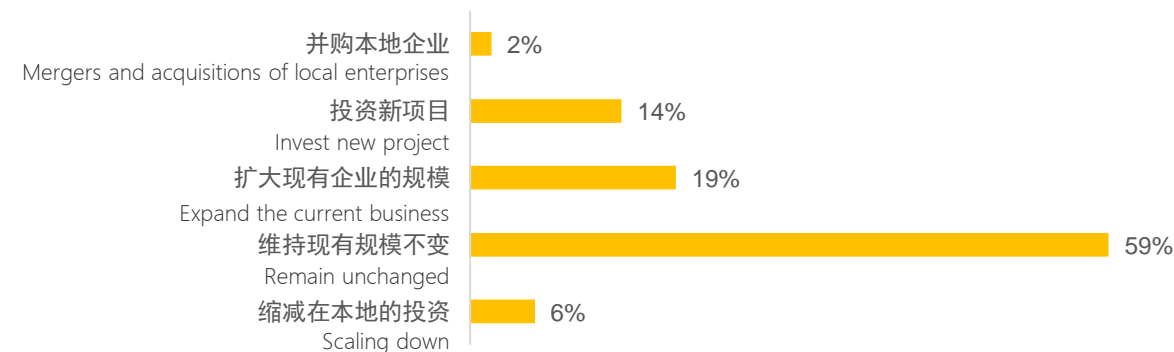
At the same time, the Chinese government and the Chongqing government have also introduced a series of support policies, including tax incentives, reducing the burden of enterprises, simplifying the approval process and other measures, which have created a better and more relaxed business environment for enterprises.

- ▶ 2023年2月，重庆市政府出台了《重庆市进一步支持市场主体发展推动经济企稳恢复提振政策措施》，要求从财税金融支持力度、持续扩大有效需求、促进创新发展、稳定外贸外资等方面扎实做好稳增长、稳就业、稳物价工作，进一步支持市场主体发展，推动经济企稳恢复提振。这一政策有力支持了企业营业状况的改善。

In February 2023, the Chongqing Municipal Government issued "the Policy Measures of Chongqing to Further Support the Development of Market Subjects and Promote the Stabilization, Recovery and Boosting of the Economy", requires solid efforts to stabilize growth, employment and prices in terms of fiscal, tax and financial support, continuous expansion of effective demand, promotion of innovative development, and stabilization of foreign trade and foreign capital, further support the development of market subjects and promote the stabilization, recovery and boost of the economy. This policy strongly supports the improvement of business conditions of enterprises.

- ▶ 2023年11月，重庆市发展和改革委员会印发了《重庆市进一步加大力度支持民间投资发展的若干政策措施》，提出支持民间投资参与重点领域项目、支持民间投资多方式盘活存量资产、加强民间投资融资支持、加强民间投资政务服务等各方面多项具体举措，持续激发投资活力，促进投资高质量发展。

In November 2023, Chongqing Development and Reform Commission issued "Several Policies and Measures for Chongqing to Further Increase Efforts to Support the Development of Private Investment", which put forward a number of specific measures in various aspects, such as supporting private investment to participate in projects in key areas, supporting private investment to revitalize stock assets in multiple ways, strengthening private investment and financing support, and strengthening government services for private investment, so as to continuously stimulate investment vitality and promote high-quality development of investment.



图：受访企业在重庆的投资计划情况
Figure: Investment plans of the respondents in Chongqing

在投资意向方面，35%的受访企业表示未来在重庆有投资计划，包括但不限于扩大现有企业规模、投资新项目或者并购本地企业，另有59%企业表示将维持现有规模不变。整体来看，大多数受访企业对重庆市的投资意向仍然正面，表现出对当地经济发展的信心和期待，并保有进一步扩张的投资热情。

Regarding the future investment plan, 35% of the respondents indicated that they had investment plans in Chongqing in the future, including but not limited to expanding the scale of existing enterprises, investing in new projects or mergers and acquisitions of local enterprises, and 59% of the enterprises said they would remain the existing scale unchanged. On the whole, most of the enterprises interviewed still have positive investment intentions in Chongqing, showing confidence and expectations for local economic development, and maintaining investment enthusiasm for further expansion.

3

生产性服务业专题调研分析 以智能网联新能源汽车产业为例

Special Research and Analysis of Producer Services Industry
Taking the Intelligent Connected New Energy Vehicle ("NEV") Industry
as an Example

1. 概述

Overview

为何选择“与重庆市智能网联新能源汽车产业相关的”生产性服务业进行分析
Why to Choose the Producer Service Industry Related to Chongqing Intelligent Connected NEV Industry for Analysis

调研方法论
Research Methodology

2. 智能网联新能源汽车产业链介绍

Introduction to the Industrial Chain of Intelligent Connected NEV

智能网联新能源汽车全产业链图
The Whole Industry Chain Diagram of Intelligent Connected NEV

重庆市新能源汽车产业链上中下游企业分布图
Map of Upstream, Midstream and Downstream Enterprises in Chongqing's NEV Industry Chain

重庆市智能网联新能源汽车特色产业园分布图
Map of Chongqing Intelligent Connected NEV Characteristic Industrial Park

3. 相关生产性服务业分析

Analysis of Related Producer Services Industry

十大生产性服务业与智能网联新能源汽车产业链的相关度分析
Correlation Between the Top Ten Producer Service Industries and the Industrial Chain of Intelligent Connected NEV

针对十大生产性服务业，筛选出87家在渝代表性企业
Selected 87 Representative Enterprises in Chongqing for the Analysis of Top Ten Producer Service Industries

4. 小结

Debriefing



概述

Overview

生产性服务业是全球产业竞争的核心领域，是重庆发展制造业和提升产业核心竞争力的关键环节，因此对生产性服务业在重庆的发展态势进行分析和提出建议具有重要意义。

Producer service industry is the core field of global industrial competition and the key of developing manufacturing industry and enhancing industrial core competitiveness in Chongqing. It is important to analyze the development trend of producer service industry in Chongqing.

为聚焦范围，本章节仅选取与重庆市智能网联新能源汽车产业相关的生产性服务业进行分析。我们梳理了针对该产业的十大生产性服务业在重庆市的现状及其区域分布情况，展示重庆市在各大生产性服务业相关领域的发展趋势，从而以期找出重庆市生产性服务业的发展短板。从整体层面把握行业发展趋势，并结合企业实际调研情况，为智能网联新能源汽车产业相关生产性服务业的发展、产业链建设以及招商引资提供参考建议。

In order to focus on the scope, this chapter only selects the producer service industry related to Chongqing Intelligent Network Interconnection NEV Industry for analysis. We analyzed the current situation and trend of the producer services in Chongqing, in order to find out the shortcomings of the development of producer services in Chongqing. We hope this chapter could help Chongqing develop the producer services related to the Intelligent Connected NEV industry, and help Chongqing to attract the relevant investment.



生产性服务业之于重庆的意义

Why the Producer Services are so Important to Chongqing

- ▶ 生产性服务业是全球产业竞争的核心领域
Core field of global industrial competition
- ▶ 生产性服务业是重庆制造业发展的先进助力
Advanced driving force for the development of Chongqing's manufacturing industry
- ▶ 生产性服务业是重庆推动双城经济圈建设的重要抓手
Important starting point to promote the development of Chengdu-Chongqing Economic Circle
- ▶ 生产性服务业发展是集聚制造业高端要素的重要措施
Important measure to gather high-end elements of manufacturing industry
- ▶ 生产性服务业发展是提高制造业附加值的重要举措
Important measure to increase the added value of manufacturing industry

生产性服务业 Producer Service Industry



定义 Definition

生产性服务业是促进技术进步、提高生产效率、保障工农业生产活动有序进行的服务行业。它是与制造业直接相关的配套服务业，是从制造业内部生产服务部门独立发展起来的新兴产业。

Producer service industry is a service industry that promotes technological progress, improves production efficiency and ensures the orderly progress of industrial and agricultural production activities. It is a supporting service industry directly related to manufacturing industry, an emerging industry independently developed from the production service sector within manufacturing industry.



分类 Classification

根据统计局印发的《生产性服务业统计分类（2019）》（国统字〔2019〕43号），生产性服务业分为10个大类、35个中类、171个小类：

According to the "Statistical Classification of Producer Services" (2019) (Guo Tong Zi [2019] No. 43) issued by the Bureau of Statistics, the producer services are divided into 10 categories, 35 categories and 171 sub-categories:

1. 研发设计与其他技术服务 Research & Development, design and other technical services
2. 货物运输、通用航空生产、仓储和邮政快递服务 Cargo transportation, general aviation production, warehousing and postal express delivery services
3. 信息服务 Information services
4. 金融服务 Financial services
5. 节能与环保服务 Energy conservation and environmental protection services
6. 生产性租赁服务 Productive lease services
7. 商务服务 Business services
8. 人力资源管理及职业教育培训服务 Human resources management and vocational education and training services
9. 批发与贸易经纪代理服务 Wholesale and trade brokerage services
10. 生产性支持服务 Productive support services



历史沿革 History

1966年美国经济学家-H.Greenfield在研究服务业及其分类时，最早提出了生产性服务业（Producer Services）的概念。

In 1966, the American economist H. Greenfield first raised the concept of producer services.

中国于2006年出台的《国民经济和社会发展第十一个五年规划纲要》明确提出拓展生产性服务业，在“十一五”规划中，生产性服务业发展被确定为优先发展交通运输业，大力发展现代物流业，有序发展金融服务业，积极发展信息服务业，规范发展商务服务业。

China government issued "the Outline of the 11th Five-Year Plan for National Economic and Social Development" in 2006, clearly proposing to expand producer services. In the 11th Five-Year Plan, the development of producer services has been determined as giving priority to the development of transportation, vigorously developing modern logistics, orderly developing financial services, actively developing information services and standardizing the development of business services.

中国统计局2019年发布的行业分类，将生产性服务业分为10个大类、35个中类、171个小类（见上述）。

According to the notice of the Bureau of Statistics in 2019, the producer services are divided into 10 categories, 35 categories and 171 sub-categories (refer to above).

为何选择“与重庆市智能网联新能源汽车产业相关的”生产性服务业进行分析

Why to Choose the Producer Service Industry Related to Chongqing Intelligent Connected NEV Industry for Analysis

我们选取重庆最具代表性的制造业集群去分析其对应的生产性服务业，有利于聚焦范围和深入分析。

We select the most representative manufacturing industry set in Chongqing to analyze its corresponding producer services, which is conducive to focusing on the scope and in-depth analysis.



最具代表性的制造业集群
Most representative manufacturing industry cluster



3大万亿级主导产业集群之一
One of the three trillion-level leading industrial clusters



更聚焦
More focus

33618

“33618”现代制造业集群体系

"33618" Modern Manufacturing Cluster System

根据《深入推进新时代新征程新重庆制造业高质量发展行动方案（2023—2027年）》，重庆提出加快构建“33618”现代制造业集群体系，涵盖3个主导产业、3个支柱产业、6个特色优势产业和18个“新星”产业：

According to the "Action Plan for Deeply Promoting the High-quality Development of Manufacturing Industry in New Chongqing in the New Era and New Journey (2023-2027)", Chongqing proposes to accelerate the construction of "33618" modern manufacturing cluster system, covering 3 leading industries, 3 pillar industries, 6 characteristic advantageous industries and 18 "new star" industries:

- ▶ **3大万亿级主导产业集群：智能网联新能源汽车、新一代电子信息制造业、先进材料。**
Three trillion-level (in RMB) leading industrial clusters: Intelligent Connected NEV, new generation electronic information manufacturing industry and advanced materials.
- ▶ **3大五千亿级支柱产业：智能装备及智能制造、食品及农产品加工、软件信息服务。**
Three 500 billion-level (in RMB) pillar industrial clusters: intelligent equipment and intelligent manufacturing, food and agricultural product processing, software information services.
- ▶ **6大千亿级特色优势产业集群：新型显示、高端摩托车、轻合金材料、轻纺、生物医药、新能源及新型储能。**
Six 100 billion-level (in RMB) characteristic advantageous industrial clusters: new display, high-end motorcycle, light alloy materials, light textile, biomedicine, new energy and new energy storage.
- ▶ **18个“新星”产业集群：包括培育6个未来产业集群，以及12个五百亿级、百亿级的高成长性产业集群。其中，6个未来产业集群分别是：卫星互联网、生物制造、生命科学、元宇宙、前沿新材料、未来能源。12个高成长性产业集群，包括：功率半导体及集成电路、AI及机器人、服务器、智能家居、传感器及仪器仪表、智能制造装备、动力装备、农机装备、纤维及复合材料、合成材料、现代中药、医疗器械。**
18 "new star" industrial clusters: including the cultivation of 6 future industrial clusters and twelve 50 billion-level and 10 billion-level (in RMB) high growth industrial clusters. Among them, the six future industrial clusters are: satellite Internet, biological manufacturing, life science, meta-universe, cutting-edge new materials and future energy. Twelve high-growth industrial clusters, including: power semiconductors and integrated circuits, AI and robots, servers, smart homes, sensors and instrumentation, intelligent manufacturing equipment, power equipment, agricultural machinery equipment, fibers and composite materials, synthetic materials, modern Chinese medicine, medical devices.

智能网联新能源汽车产业集群

Intelligent Connected NEV Industry Cluster

作为重要的主导产业集群，重庆市新能源汽车产业取得重大进展，2022年，重庆新能源汽车产量达到了36.5万辆，实现同比增长140%，2023年全年新能源汽车产量50.03万辆，实现历史性突破，新能源汽车保有量达到了22.3万辆，占全市汽车保有量的比例已经超过了15%。其中纯电动汽车保有量为12.6万辆，插电式混合动力汽车保有量为9.7万辆。重庆市政府还计划到2025年，新能源汽车保有量要达到50万辆以上，成为全国新能源汽车产业的新引领地。

As an important leading industrial cluster, Chongqing's NEV industry has made significant progress. In 2022, Chongqing's NEV production reached 365,000 vehicles, an increase of 140% over the same period last year. In 2023, the annual output of NEVs was 500,300 vehicles, a historic breakthrough was achieved, and the ownership of NEVs reached 223,000 vehicles, accounting for more than 15% of the city's automobile ownership. Among them, the ownership of pure electric vehicles is 126,000, and the ownership of plug-in hybrid vehicles is 97,000. The Chongqing Municipal Government also plans to have more than 500,000 NEVs by 2025, becoming a new leader in the national NEV industry.

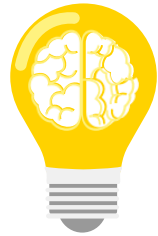
《重庆智能网联新能源汽车零部件产业集群提升专项行动方案（2023—2027年）》提出，重庆市智能网联新能源汽车行业的发展目标包括：到2027年，持续聚集国内外知名企业，做强做优现有企业，培育一批专精特新“小巨人”企业，打造一批在全国细分领域领先的链主企业，全市智能网联新能源汽车零部件产业营业收入达到7,000亿元，累计新增新型智能网联新能源汽车零部件企业800家。

According to the "Special Action Plan for the Promotion of Chongqing Intelligent Network Interconnection NEV Parts Industry Cluster (2023-2027)", the development goals of Chongqing Intelligent Network Interconnection NEV Industry include: by 2027, continue to gather well-known enterprises at home and abroad, strengthen and optimize existing enterprises, cultivate a number of specialized, special and new "Little Giant" enterprises, build a number of leading chain owners in the national subdivision field. The operating income of the city's Intelligent Connected NEV parts industry reached RMB 700 billion, and 800 new Intelligent Connected NEV parts enterprises were added.



调研方法论

Research Methodology



调研方法

Research Method

- ▶ **信息收集**：通过公开渠道调研重庆市智能网联新能源汽车相关的生产性服务业概况，以收集相关生产性服务业在所属行业、区域分布以及发展现状与趋势等方面的信息。

Information collection: Survey the producer service industry related to intelligent network connected NEV in Chongqing through open channels to collect information on the industry, regional distribution, development status and trend of related producer service industries.

- ▶ **企业调研**：前往多个智能网联新能源汽车产业链相关企业进行实地调研与访谈，从而了解各企业对于选址落位、政策诉求等问题的真实考量，并就产业链生态、生产性服务业发展情况等问题进行详细探讨，以了解重庆市智能网联新能源汽车相关企业在生产运营过程中的真实感受。

Enterprise research: Onsite visit some intelligent network-connected NEV industry chain related enterprises for field research and interviews, so as to understand the real considerations of enterprises on location study, demands and other concerns, and conduct detailed discussions on industrial chain ecology, producer service industry development and other issues, so as to understand the real feelings of intelligent network-connected NEV related enterprises in Chongqing in the process of production and operation.

- ▶ **案头分析**：基于所收集的信息进行汇总分析，选取重点领域及重点企业，通过纵向及横向对比、区位分布透视、指标对比分析等方法深入研究各环节所涉及的生产性服务业的发展现状及发展趋势，分析产业发展优劣势，为重庆市生产性服务业的发展提供参考与建议。

Desktop analysis: based on the collected information, conduct summary analysis, select key areas and key enterprises, conduct in-depth research on the development status and trend of producer services involved in each link through vertical and horizontal comparison, location distribution perspective, index comparison and analysis, analyze the advantages and disadvantages of industrial development, and provide reference and suggestions for the development of producer services in Chongqing.



调研思路

Research Path

智能网联新能源汽车是一个复杂的产品系统，产业链条长，涵盖主体多。其核心产业由新能源汽车电池、电机、电控的生产展开，并延伸至多个产业领域。因此，本次调研将围绕“智能网联新能源汽车”产业链中的上游、中游、下游三个关键环节展开。

Intelligent network connected NEV are a complex product system, with a long industrial chain and many subjects. Its core industry is launched by the production of NEV batteries, motors and electronic controls, and extends to a number of industrial fields. Therefore, this research will focus on the upstream, midstream and downstream three key links in the industrial chain of "Intelligent Connected NEV".

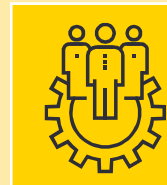
智能网联新能源汽车产业链

Intelligent Connected NEV Industry Chain

上游 Upstream

智能网联新能源汽车零配件：汽车芯片、汽车软件、电池、电机、电控、热管理等关键系统及其核心零部件制造。

Intelligent Connected NEV parts: automobile chip, automobile software, battery, motor, electronic control, thermal management and other key systems and core parts manufacturing



下游 Downstream

智慧出行等基础设施建设：包括充电、换电、加注氢、车路协同、智慧立体交通等领域。

Infrastructure construction related to smart travel: including charging, power exchange, hydrogen injection, vehicle road coordination, smart three-dimensional transportation and other fields.



中游 Midstream

新能源汽车整车制造：包括混合动力、燃料电池电动汽车等电动汽车以及氢燃料汽车的整车制造。

NEV manufacturing: including hybrid, fuel cell electric vehicles and other electric vehicles as well as hydrogen fuel vehicles.



智能网联新能源汽车产业链通过上游技术支持和下游需求支撑，可以对整车制造厂商发挥重要的支撑作用，需要整个产业链持续保持全局性的迭代和进化，通过技术的不断创新升级，同时在产业和生态之间实现更多的融合和共生。

The intelligent network connected NEV industry chain can play an important supporting role for vehicle manufacturers through upstream technical support and downstream demand support. The whole industry chain needs to continue to maintain overall iteration and evolution, and achieve more integration and symbiosis between industry and ecology through continuous innovation and upgrading of technology.

因此，我们的调研将基于产业链各环节的协同效应，针对各环节流程中所涉及的生产性服务业展开，探讨各类生产性服务业在智能网联新能源汽车产业链中发挥的作用、亮点成绩、发展趋势，同时发现相关生产性服务业的短板。并结合企业调研与分析结果，为重庆市生产性服务业发展提供建议。

Therefore, based on the synergistic effect of each link of the industrial chain, our research will focus on the producer services involved in each link process, explore the role, highlights and development trends of various producer services in the industrial chain of intelligent network-connected NEV, and find the shortcomings of related producer services. Combined with the results of enterprise research and analysis, this paper provides suggestions for the development of producer services in Chongqing.

智能网联新能源汽车全产业链图

The Whole Industry Chain Diagram of Intelligent Connected NEV

新能源汽车产业链包括上游原材料与零配件、中游整车制造和下游基础设施及应用市场三个主要环节。

The NEV industry chain includes three main links: upstream raw materials and spare parts, midstream vehicle manufacturing, and downstream infrastructure and application markets.

上游原材料与零配件：这一环节主要包括新能源汽车所需的各种原材料和零配件的生产和供应。例如，锂、镍、钴等金属材料用于电池生产，电机、控制器等零部件用于整车制造。上游供应链的稳定和高质量的原材料与零配件供应对整个产业链的发展至关重要。

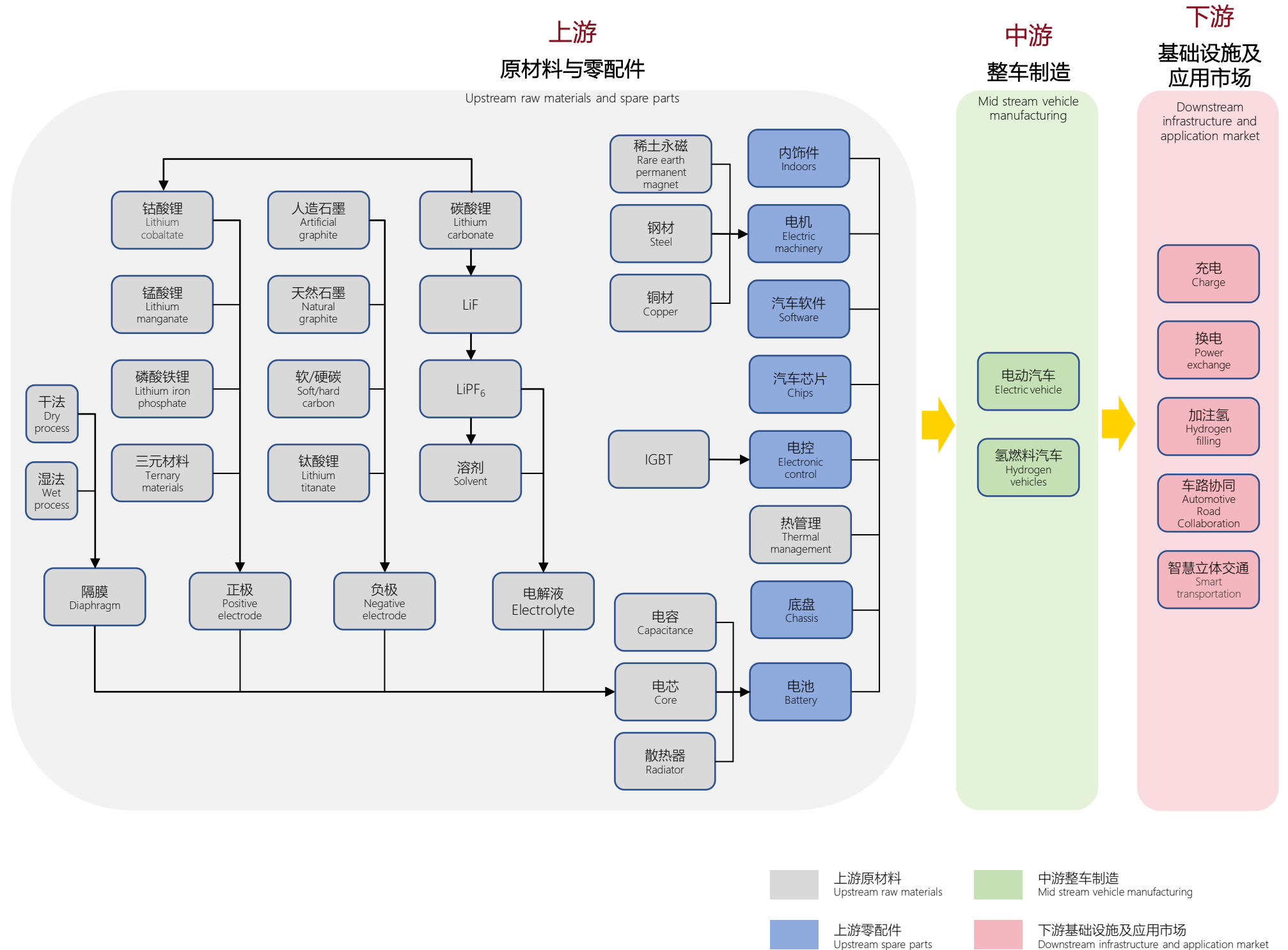
Upstream raw materials and spare parts: This process mainly includes the production and supply of various raw materials and spare parts required for NEV. For example, metal materials such as lithium, nickel, and cobalt are used in battery production, while components such as motors and controllers are used in vehicle manufacturing. The stability and high-quality supply of raw materials and spare parts in the upstream supply chain are crucial for the development of the entire industry chain.

中游整车制造：这一环节是新能源汽车产业链的核心环节，包括整车设计、研发、生产和销售。制造商需要将原材料和零配件组装成成品车辆，并确保产品质量、性能和安全符合标准。整车制造环节的技术创新和生产效率对新能源汽车产业的竞争力具有重要影响。

Mid stream vehicle manufacturing: This link is the core of the NEV industry chain, including vehicle design, research and development, production, and sales. Manufacturers need to assemble raw materials and spare parts into finished vehicles and ensure that product quality, performance, and safety meet standards. The technological innovation and production efficiency in the entire vehicle manufacturing process have a significant impact on the competitiveness of the NEV industry.

下游基础设施及应用市场：这一环节包括新能源汽车充电设施建设、充电网络覆盖、政策支持和消费市场需求等。充电基础设施的建设和完善，政府政策的引导和支持，以及消费者对新能源汽车的接受程度都将影响新能源汽车产业的发展 and 市场规模。

Downstream infrastructure and application market: This link includes the construction of NEV charging facilities, charging network coverage, policy support, and consumer market demand. The construction and improvement of charging infrastructure, guidance and support from government policies, and consumer acceptance of NEV will all affect the development and market size of the NEV industry.



重庆市智能网联新能源汽车特色产业园分布图

Map of Chongqing Intelligent Connected NEV Characteristic Industrial Park

2022年12月，重庆市经济和信息化委员会发布了《关于公布重庆市智能网联新能源汽车特色产业园创建名单的通知》（渝经信园区〔2022〕26号），决定将两江新区等13个区县纳入重庆市智能网联新能源汽车特色产业园创建范围。安永整理制作了相应的分布图如下，仅供参考。

In December 2022, Chongqing Municipal Economic and Information Commission issued the "Notice on Announcing the List of Creation of Chongqing Intelligent Connected NEV Characteristic Industrial Park" (Yujingxin Park [2022] No.26), deciding to include 13 districts and counties such as Liangjiang New Area into the scope of creation of Chongqing Intelligent Connected NEV Characteristic Industrial Park. EY prepared the corresponding map as follows for your reference.

1. 鱼复新城、龙兴新城产业园（两江新区）

Yufu New City, Longxing New City Industrial Park (Liangjiang New Area)

智能网联新能源汽车整车、传统零部件升级，智能网联新能源汽车高端核心零部件

Upgrading of intelligent network connected NEV, upgrading of traditional components, high-end core components for intelligent connected NEVs

2. 含谷、科学谷片区、金凤软件园（西部科学城、重庆高新区）

Hangu Industrial Park, Science Valley Area, Jinfeng Software Park (Western Science City, Chongqing High-tech Zone)

车端网联、自动驾驶算法软件、智能驾驶（中控）、智能车云、汽车工业软件

Vehicle-side networking, autonomous driving algorithm software, intelligent driving (central control), intelligent vehicle cloud, automotive industry software

3. 空港园区、仙桃数据谷（渝北区）

Airport Park, Xiantao Data Valley (Yubei)

车载OS及开发工具链、自动驾驶算法软件、车载应用软件、环境感知系统（雷达、摄像头等）、智能座舱

In-vehicle operating system (OS) and development toolchain, autonomous driving algorithm software, in-vehicle application software, environment perception system (radar, camera, etc.), intelligent cockpit

4. 西彭工业园区（九龙坡区）

Xipeng Industrial Park (Jiulongpo)

氢燃料电池系统、热管理系统（电空调）、轻量化部件

Hydrogen fuel cell system, thermal management system (electric air conditioning), lightweight components

5. 璧山高新区（璧山区）

Bishan High-Tech Zone (Bishan)

动力电池系统、电驱系统（电机、电控）、转向制动系统

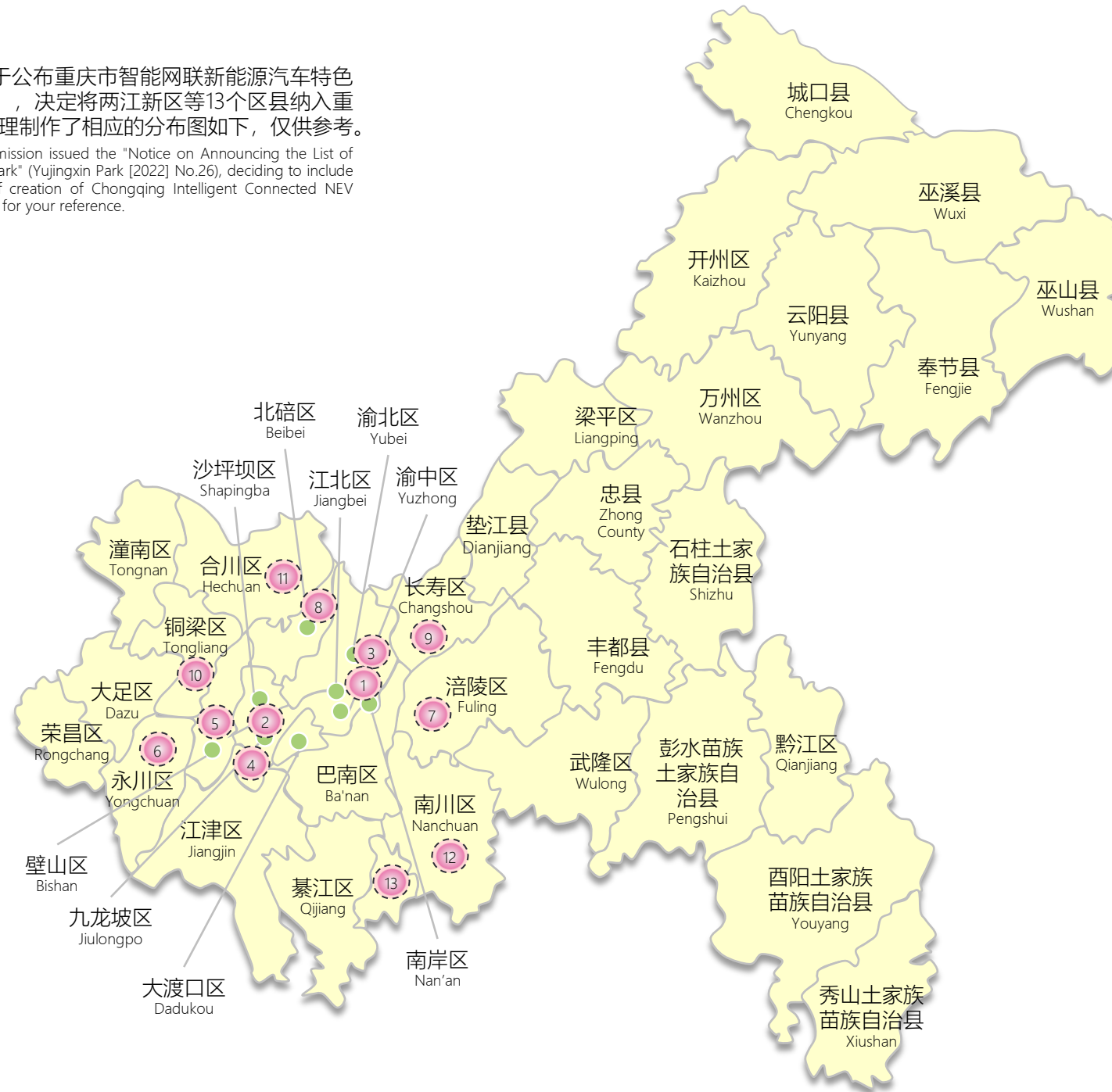
Power battery system, electric drive system (motor, electronic control), steering and brake system

6. 永川高新区凤凰湖产业园、大数据产业园（永川区）

Fenghuang Lake Industrial Park in Yongchuan High-Tech Zone, Big Data Industrial Park in Yongchuan (Yongchuan)

智能座舱、智能车控（底盘）、环境感知系统（雷达、摄像头等）、智能驾驶（中控）

Intelligent cockpit, intelligent vehicle control (chassis), environmental awareness system (radar, camera, etc.), intelligent driving (central control)



7. 涪陵高新区（涪陵区）

Fuling High-Tech Zone (Fuling)

动力电池系统、轻量化部件

Power battery system, lightweight components

8. 同兴工业园区（北碚区）

Tongxing Industrial Park (Beibei)

电驱系统（电机、电控）、车端网联、轻量化部件

Electric drive system (motor, electric control), vehicle-end network connection and lightweight components

9. 长寿经开区（长寿区）

Changshou Economic and Technological Development Zone (Changshou)

动力电池系统、轻量化部件、智能座舱

Power battery system, lightweight components, smart cockpit

10. 铜梁高新区（铜梁区）

Tongliang High-Tech Zone (Tongliang)

动力电池系统、制动转向系统

Electric drive system, braking and steering system

11. 合川高新区（合川区）

Hechuan High-Tech Zone (Hechuan)

电驱系统（电机、电控）、转向制动系统、轻量化部件

Electric drive system (motor, electronic control), steering braking system, lightweight components

12. 南川工业园区（南川区）

Nanchuan Industrial Park (Nanchuan)

轻量化部件、转向制动系统、智能座舱、动力电池系统

Lightweight components, steering and braking system, smart cockpit, power battery system

13. 万盛工业园区（万盛经开区）

Wansheng Industrial Park (Wansheng)

轻量化部件、动力电池系统、车端网联

Lightweight components, electric drive system, vehicle-side networking

十大生产性服务业与智能网联新能源汽车产业链的相关度分析

Correlation between the Top Ten Producer Service Industries and the Industrial Chain of Intelligent Connected NEV

依据《生产性服务业统计分类（2019）》（国统字〔2019〕43号），生产性服务业被划分为10个大类、35个中类、171个小类。我们评估了171个小类生产性服务业与智能网联新能源汽车产业链的相关度，并用星级表示相关性程度：★★★代表相关度强，★★代表相关度中等，★代表相关度弱，-代表几乎不相关。

According to the "Statistical Classification of Productive Services (2019)" (Guo Tong Zi [2019] No.43), producer services are divided into 10 major categories, 35 medium categories and 171 sub-categories. We evaluated the correlation between 171 sub-categories of producer services and the NEV industry chain, and expressed the degree of correlation with stars: ★★★ represent strong correlation, ★★ represent medium correlation, ★ represents weak correlation, and - represents almost no correlation.

1 研发设计与其他技术服务 R&D, design and other technical services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
专业设计服务 Professional design services	★★★	知识产权服务 Intellectual property services	★★★
质检技术服务 Quality Inspection Technical Services	★★★	工业设计服务 Industrial design services	★★
生产性法律服务 Productive legal services	★★	生产性自然科学研究和试验发展 Productive scientific research and experimental development	★
工程和技术研究和试验发展 Engineering and technical research and test development	★	新材料技术推广服务 New materials technology promotion services	★
其他生产性技术推广服务 Other productive technology promotion services	★	科技中介服务 Technology intermediary services	★
创业空间服务 Entrepreneurial space services	★	其他科技推广服务业 Other technology promotion services	★
生产性测绘服务 Productive mapping services	★	工程管理服务 Engineering management services	★
三维（3D）打印技术推广服务 3D printing technology promotion service	★	其他生产性专业技术服务 Other productive professional technical services	★
工程监理服务 Engineering supervision services	★	生产性医学研究和试验发展 Productive medical research and experimental development	—
农业科学研究和试验发展 Agricultural scientific research and experimental development	—	生物技术推广服务 Biotechnology promotion services	—
农林牧渔技术推广服务 Agricultural, forestry, animal husbandry and fishery technology promotion services	—	生产性地震服务 Productive seismic services	—
生产性气象服务 Productive meteorological services	—	地质勘查服务 Geological survey services	—
生产性海洋服务 Productive marine services	—		

2 节能与环保服务 Energy Conservation and Environmental Protection Services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
节能技术和产品推广服务 Energy saving technology and product promotion services	★★★	节能咨询服务 Energy conservation consultation services	★★
环保技术推广服务 Environmental protection technology promotion service	★★	生产性固体废物治理 Productive solid waste management	★
生产性危险废物治理 Treatment of productive hazardous wastes	★	生产性其他污染治理 Productive other pollution control	★
生产性环境保护监测 Productive environmental protection monitoring	★	生产性大气污染治理 Productive air pollution control	★
再生资源回收与批发 Recycling and wholesale of recycled materials	★	生产性污水处理和水污染治理 Productive wastewater treatment and water pollution control	★
生产性放射性废物治理 Treatment of Productive Radioactive Waste	—		

3 货物运输、通用航空生产、仓储和邮政快递服务

Cargo transportation, general aviation production, warehousing and postal express delivery services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
道路货物运输 Road freight transport	★★★	道路货物运输辅助活动 Auxiliary activities for road freight transportation	★★★	水上货物运输 Water cargo transportation	★★★
通用仓储 General Warehousing	★★★	水上货物运输辅助活动 Auxiliary activities for water freight transportation	★★★	生产性包装服务 Production packaging services	★★★
铁路货物运输辅助活动 Rail freight transport support activities	★★★	铁路货物运输 Rail freight transport	★★★	航空货物运输辅助活动 Auxiliary activities for air cargo transportation	★★★
生产性装卸搬运 Productive Handling	★★★	货物运输代理服务 Freight forwarding services	★★★	生产性邮政服务 Production postal services	★★★
其他仓储业 Other warehousing	★★★	航空货物运输 Carriage of cargo by air	★★★	其他生产活动递送服务 Other production activities in delivery services	★★★
生产性快递服务 Productive courier services	★★★	危险品仓储 Dangerous goods storage	★★	通用航空生产服务 General aviation production services	—
中药材仓储 Traditional Chinese Medicine Warehousing	—	谷物、棉花等农产品仓储 Storage of agricultural products such as grains and cotton	—	低温仓储 Cold storage warehousing	—
管道运输业 Pipeline transportation	—				

4 信息服务 Information services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
软件开发 Software development	★★★	信息处理和存储支持服务 Information processing and Storage support services	★★★
信息技术咨询服务 Information technology consulting services	★★★	集成电路设计 Integrated circuit design	★★★
互联网数据及云计算服务 Internet data and cloud computing services	★★	其他互联网平台 Other Internet platforms	★★
生产性互联网销售 Productive internet sales	★★	其他互联网服务 Other Internet services	★★
信息系统集成和物联网技术、运行维护服务 Information system integration and Internet of things technology, operation and maintenance services	★★	互联网安全服务 Internet security services	★★
生产性非金融机构支付服务 Productive non-financial institution payment services	★★	互联网生产服务平台 Internet production services platform	★★
其他信息技术服务业 Other IT services	★★	互联网科技创新平台 Internet technology innovation platform	★★
生产性互联网接入及相关服务 Productive Internet access and related services	★	生产性数字内容服务 Productive digital content services	★
生产性移动通信服务 Productive mobile telecommunication services	—	生产性固定电信服务 Productive fixed telecommunication services	—
其他生产活动电信服务 Telecommunications services for other production activities	—	生产性互联网信息服务 Productive Internet information services	—

5 人力资源管理与职业教育培训服务

Human resources management and vocational education and training services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
劳务派遣服务 Labor dispatch services	★★★	职业技能培训 Vocational skills training	★★	创业指导服务 Entrepreneurship guidance services	★
其他人力资源服务 Other human resources services	★	职业中介服务 Employment intermediary services	★	中等职业学校教育 Secondary vocational education	★
高等职业学校教育 Higher vocational education	★	职业初中教育 Vocational junior secondary education	—		

十大生产性服务业与智能网联新能源汽车产业链的相关度分析

Correlation between the Top Ten Producer Service Industries and the Industrial Chain of Intelligent Connected NEV

6 金融服务 Finance services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
保险经纪与代理服务 Insurance brokerage and agency services	★★★	汽车金融公司服务 Automotive financial company services	★★★	商业银行服务 Commercial bank services	★★★
生产性财产保险 Productive property insurance	★★★	财务公司服务 Financial company services	★★	网络借贷服务 Online lending services	★★
生产性再保险 Productive reinsurance	★★	小额贷款公司服务 Small loan company services	★★	信用合作社服务 Credit union services	★★
控股公司服务 Holding company services	★★	其他货币金融服务 Other monetary and financial services	★	证券市场服务 Securities market services	★
银行监管服务 Banking regulatory services	★	保险监管服务 Insurance regulatory services	★	其他保险活动 Other insurance activities	★
基金管理服务 Fund management services	★	资本投资服务 Capital investment services	★	其他资本服务 Other capital services	★
保险资产管理 Insurance asset management	★	保险公估服务 Insurance assessment services	★	金融信息服务 Financial information services	★
期货市场服务 Futures market services	★	金融资产管理公司 Financial asset management companies	★	非融资担保服务 Non-financing guarantee services	★
金融信托与管理服务 Financial trust and management services	★	其他未列明金融业 Other unspecified financial services	★		

7 生产性租赁服务 Productive lease services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
生产性汽车租赁 Production car rental	★★★	其他机械与设备经营租赁 Other operating leases of machinery and equipment	★★
融资租赁服务 Finance lease services	★★	计算机及通讯设备经营租赁 Operating leases of computer and communication equipment	★
建筑工程机械与设备经营租赁 Operating lease of construction machinery and equipment	—	农业机械经营租赁 Operating lease of agricultural machinery	—
医疗设备经营租赁 Medical equipment operating leases	—		

8 批发与贸易经纪代理服务 Wholesale and trade brokerage services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
机械设备、五金产品及电子产品批发 Wholesale of machinery, hardware products, and electronic products	★★	其他未列明批发业 Other unspecified wholesale business	★
互联网批发 Internet wholesale	★	贸易代理 Trade agency	★
其他贸易经纪与代理 Other trade brokerage and agency	—	食品、饮料及烟草制品批发 Wholesale of food, beverages, and tobacco products	—
农、林、牧、渔产品及宠物食品用品批发 Wholesale of agricultural, forestry, animal husbandry, fishery products, and pet food	—	文化、体育用品及器材批发 Wholesale of cultural, sports goods, and equipment	—
一般物品拍卖 General Merchandise Auction	—	矿产品、建材及化工产品批发 Wholesale of mineral products, building materials, and chemical products	—
艺术品、收藏品拍卖 Art and collectibles auction	—	纺织、服装及家庭用品批发 Wholesale of textiles, clothing, and household goods	—
艺术品代理 Art agency	—	医药及医疗器材批发 Wholesale of pharmaceuticals and medical equipment	—

9 商务服务 Business services

小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
生产性安全保护服务 Production safety protection services	★★★	市场调查 Market research	★★
企业总部管理 Enterprise headquarters management	★★	商务咨询服务 Business consulting services	★★
园区和商业综合体管理服务 Park and commercial complex management services	★★	广告业 Advertising industry	★★
供应链管理服务 Supply chain management services	★★	生产性市场管理服务 Production market management services	★★
投资与资产管理 Investment and asset management	★	会议、展览及相关服务 Conference, exhibition, and related services	★
单位后勤管理服务 Unit logistics management services	★	办公和翻译服务 Office and translation services	★
其他组织管理服务 Other organizational management services	★	信用服务 Credit services	★
其他综合性管理服务 Other comprehensive management services	★	其他未列明生产性商务服务 Other unspecified production business services	★
会计、审计及税务服务 Accounting, auditing, and tax services	★	资源与产权交易服务 Resource and property transaction services	—
农村集体经济组织管理 Rural collective economic organization management	—		

10 生产性支持服务 Productive support services

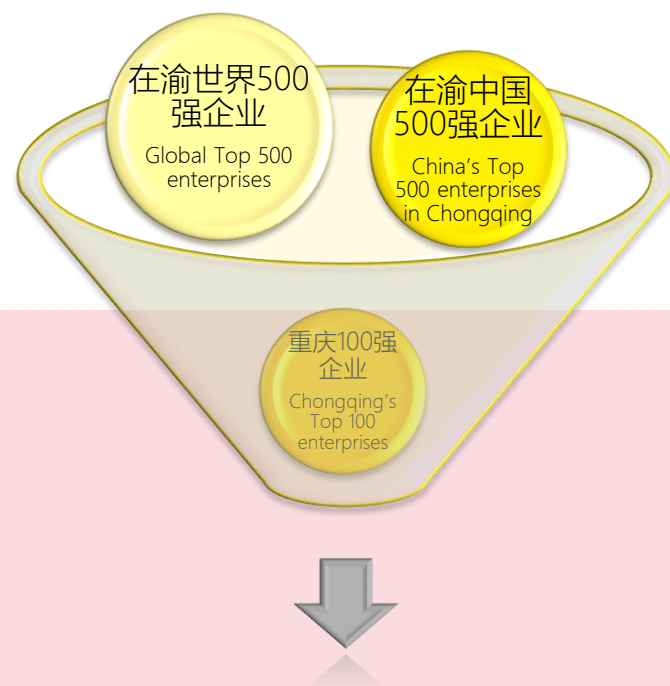
小类 Sub-categories	相关度 Correlation	小类 Sub-categories	相关度 Correlation
金属制品、机械和设备修理业 Repair and maintenance of metal products, machinery, and equipment	★★★	生产用汽车修理与维护 Production car repair and maintenance	★★★
为生产人员提供的交通服务 Traffic services for production personnel	★★★	为生产人员提供的其他支助服务 Other support services for production personnel	★★
生产用助动车修理与维护 Repair and maintenance of auxiliary vehicles for production	★★	生产用计算机和办公设备维修 Repair and maintenance of production computers and office equipment	★★
生产用大型车辆装备修理与维护 Repair and maintenance of large vehicles and equipment for production	★★	生产用电器修理 Repair of electrical appliances for production	★★
其他生产性清洁服务 Other Production-Related Cleaning Services	★★	生产用摩托车修理与维护 Motorcycle repair and maintenance for production use	★
建筑物清洁服务 Building cleaning services	★	渔业专业及辅助性活动 Specialized and auxiliary activities in fishing	—
其他开采专业及辅助性活动 Other specialized and auxiliary activities in mining	—	石油和天然气开采专业及辅助性活动 Specialized and auxiliary activities in oil and natural gas extraction	—
农业专业及辅助性活动 Agricultural specialized and auxiliary activities	—	畜牧专业及辅助性活动 Specialized and auxiliary activities in livestock farming	—
林业专业及辅助性活动 Forestry specialized and auxiliary activities	—	煤炭开采和洗选专业及辅助性活动 Specialized and auxiliary activities in coal mining and washing	—

针对十大生产性服务业，筛选出87家在渝代表性企业

Selected 87 Representative Enterprises in Chongqing for the Analysis of Top Ten Producer Service Industries

为分析十大生产性服务业，我们针对在渝世界500强企业、在渝中国500强企业以及重庆100强企业进行了摸排，按其是否可以归属于生产性服务业进行了筛选。筛选结果显示：在重庆市，所选代表性企业中与智能网联新能源汽车相关的生产性服务业代表性企业约87家。

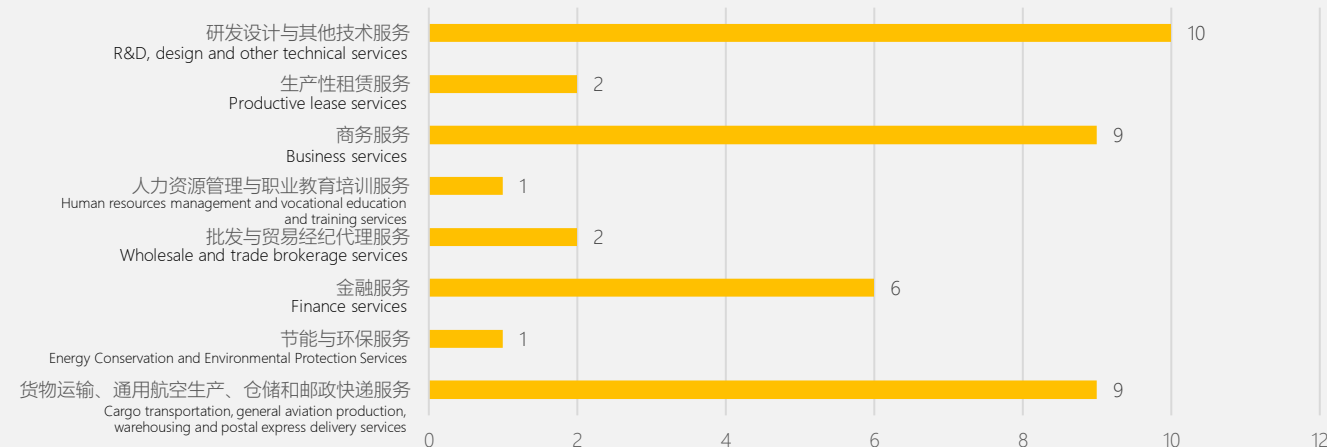
To analyze the top ten producer services, we researched the Global Top 500 enterprises in Chongqing, China's Top 500 enterprises in Chongqing and Chongqing's Top 100 enterprises, and filter out those engaging in producer services. Based on the filter results, it appears that there are about 87 representative producer services enterprises related to Intelligent Connected NEV.



与智能网联新能源汽车相关的

87家在渝生产性服务业代表性企业

87 Representative Producer Services Enterprises Related to Intelligent Connected NEV



数量	货物运输、通用航空生产、仓储和邮政快递服务	节能与环保服务	金融服务	批发与贸易经纪代理服务	人力资源管理与职业教育培训服务	商务服务	生产性租赁服务	研发设计与其他技术服务
Amount	Cargo transportation, general aviation production, warehousing and postal express delivery services	Energy Conservation and Environmental Protection Services	Finance services	Wholesale and trade brokerage services	Human resources management and vocational education and training services	Business services	Productive lease services	R&D, design and other technical services



这87家企业中，金融服务、货物运输、通用航空生产、仓储和邮政快递服务以及商务服务企业占比最多，分别达到了23家、18家、14家，合计占比约63%。另外，信息服务以及研发设计与其他技术服务领域的企业数量较多，均达到12家，占比各约14%。在生产性租赁服务、生产性支持服务、人力资源管理与职业教育培训服务、节能与环保服务等领域，相关企业的数量及发展水平仍有待发展。

Among these 87 enterprises, financial services, cargo transportation, general aviation production, warehousing and postal express services and business services accounted for the largest proportion, reaching 23, 18 and 14 respectively, accounting for about 63% in total. In addition, the number of enterprises in the field of information services, R&D design and other technical services is relatively large, reaching 12, accounting for about 14% each. In the fields of productive leasing services, productive support services, human resources management and vocational education and training services, energy conservation and environmental protection services, the number and development level of related enterprises still need to be developed.



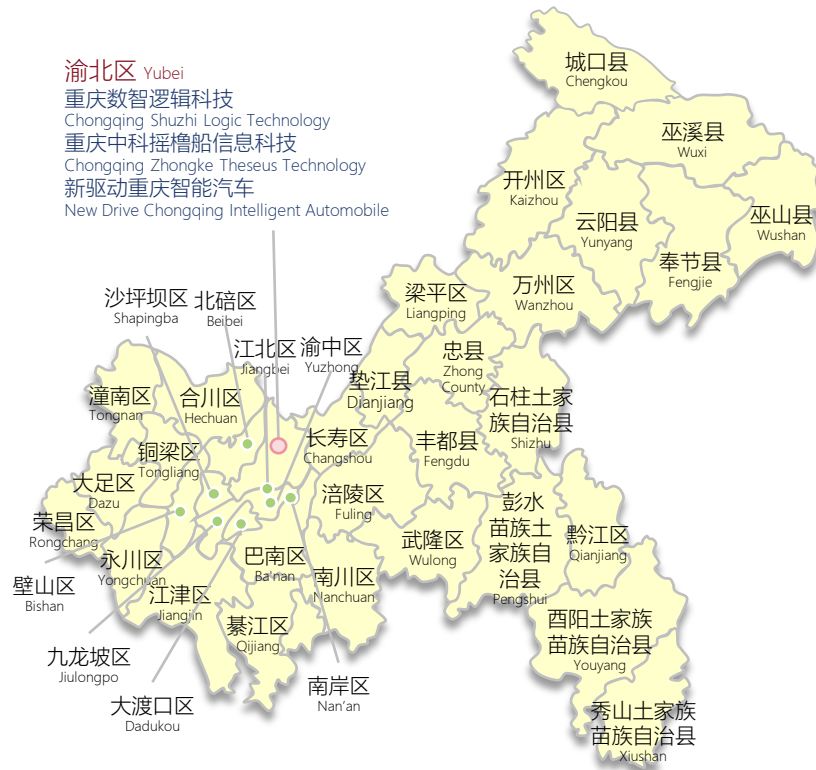
信息服务

Information Services

简介 Introduction

在信息服务配套方面，新能源汽车产业链主要涉及车联网技术、大数据分析、云计算平台、智能交通系统、数据安全与隐私保护、集成电路设计、软件开发等服务。

Regarding the information services, the NEV industry chain primarily involves services related to vehicle telematics technology, big data analysis, cloud computing platforms, intelligent transportation systems, data security and privacy protection, integrated circuit design, and software development.



发展现状及成果 Development status and achievements

西部（重庆）科学城正大力推进多个智能网联新能源汽车产业在建项目，例如大唐高鸿智联项目。2024年初，重庆市经信委公示重庆市软件和信息服务业“满天星”示范企业（首批）创建名单，两江新区3家企业获批入选，分别是：重庆数智逻辑科技有限公司、重庆中科摇橹船信息科技有限公司、新驱动重庆智能汽车有限公司。

In the Western (Chongqing) Science City, significant efforts are underway to advance multiple projects related to Intelligent Connected NEV. One such project is the Datang Gaohong Zhilian initiative. In early 2024, the Chongqing Economic and Information Commission publicly announced the list of the first batch of "Star of the Sky" demonstration enterprises in the software and information services industry in Chongqing. Among them, three companies from the Liangjiang New Area were approved: Chongqing Shuzhi Technology Co., Ltd., Chongqing Zhongke Theseus Information Technology Co., Ltd., and Novodriv Chongqing Ltd.. These developments indicate the continuous enhancement and elevation of the Intelligent Connected NEV industry in the Western (Chongqing) Science City.

发展趋势及政策规划 Development trend and policy planning

新能源汽车更加智能化。根据《重庆市建设世界级智能网联新能源汽车产业集群发展规划（2022-2030年）》，到2025年，重庆智能网联新能源汽车产销量占全国比重达10%以上。到2030年，重庆将建成世界级智能网联新能源汽车产业集群，产业规模达全球一流水平；目前，重庆已制定智能网联新能源汽车零部件体系行动计划、自动驾驶和车联网创新应用行动计划、汽车软件和人工智能应用行动计划以及基础设施及服务行动计划，保证“规划”的实施和完成。在智能网联新能源汽车领域，沙坪坝区以赛力斯为龙头，持续招引招商引资，加快拓普、文灿等高端配套项目建设，补链强链，深耕细作“龙头+配套+平台+关键技术+场景”发展模式，促进智能网联新能源汽车产业链、价值链、创新链“三链”深度融合。

The NEV industry is becoming increasingly intelligent. According to "Development Plan for Building a World-Class Intelligent Connected NEV Industry Cluster in Chongqing (2022-2030)", by 2025, Chongqing aims to achieve a national market share of over 10% for Intelligent Connected NEV production and sales. By 2030, Chongqing plans to establish a world-class Intelligent Connected NEV industry cluster with a scale that reaches global excellence. Currently, Chongqing has formulated action plans for various aspects, including the components system for Intelligent Connected NEVs, innovation applications for autonomous driving and vehicle connectivity, automotive software, artificial intelligence applications, and infrastructure and services. These plans ensure the implementation and completion of the overall strategy. In the field of intelligent connected NEVs, the Shapingba District, led by Seres Motor, continues to attract investment, accelerate the construction of high-end supporting projects such as Tuopu and Wencan, strengthen supply chains, and deeply explore the "leader + supporting + platform + key technology + scenario" development model. This approach promotes the deep integration of the intelligent connected NEV industry chain, value chain, and innovation chain.

依据《重庆市推进智能网联新能源汽车基础设施建设及服务行动计划（2022-2025年）》，到2025年底，全市智能网联新能源汽车基础设施网络服务效率、技术能力、覆盖率在西部地区达到领先水平，率先建成能源网、交通网、信息网“三网”融合应用平台。

According to the "Chongqing Action Plan for Advancing the Construction and Service of Intelligent Connected NEV Infrastructure (2022-2025)", by the end of 2025, the efficiency, technological capabilities, and coverage of the intelligent connected NEV infrastructure network services in the entire city are expected to reach a leading level in the western region. Chongqing aims to be a pioneer in establishing an integrated application platform that combines the energy grid, transportation network, and information network.

企业声音

Enterprise voice

安永对重庆市部分重点新能源汽车产业链所在企业进行了实地走访，有企业反馈：偶尔会出现宕机、宽带不够用的情况，影响企业生产。本地软件开发企业与外企软件开发企业实力还有一定差距。

EY performed on-field interview on some key enterprises in Chongqing who involving in NEV industry chain. Some respondents mentioned that they would occasionally faced the problem due to IT system downtime and insufficient broadband capacity, which affected their production. Additionally, there remains a disparity in capabilities between local software development companies and foreign software development firms.

安永建议

EY Recommendation

提升整车新能源和智能网联化水平，支持新项目建成、新产品上量、新品牌发展壮大，持续扩大智能网联新能源汽车整车的产销规模；强化政府引导，推动能源网、交通网、信息网平台三网融合，加快充换电和加氢基础设施及服务体系建设；加快突破关键核心技术，依托摇橹船等科技企业，加快车规级芯片的研发、应用，打造全球领先的应用示范区；招商引资软件开发企业，鼓励整车企业承担汽车软件领域的国家科技重大专项和重点研发计划；推动人工智能在汽车领域应用；和移动、联通、电信三大供应商协调，为新能源汽车相应企业增设专属线路，保障宽带供应。

To enhance the level of new energy and intelligent connectivity in whole vehicles, support the completion of new projects, increase production of new products, and promote the growth of new brands. Continuously expand the production and sales scale of intelligent, connected NEV. Strengthen government guidance to promote the convergence of energy networks, transportation networks, and information networks. Accelerate the construction of charging, swapping, and hydrogen infrastructure and service systems. Speed up breakthroughs in key core technologies, relying on technology companies such as Theseus to accelerate the research and application of automotive-grade chips, creating a globally leading application demonstration area. Attract investment in software development companies, encourage whole vehicle manufacturers to undertake national scientific and technological major projects and key research and development plans in the field of automotive software. Promote the application of artificial intelligence in the automotive sector. Coordinate with the three major suppliers - China Mobile, China Unicom, and China Telecom - to establish dedicated lines for corresponding NEV enterprises and ensure broadband supply.

金融服务

Financial Services

简介 Introduction

在金融服务配套方面，新能源汽车产业主要涉及融资服务与保险服务。融资服务包括政策支持、金融产品、能源金融、融资渠道等。新能源汽车产业在金融方面需要充分利用政策支持、金融产品和融资渠道，以满足企业和消费者的资金需求，推动产业的健康发展。保险服务在新能源汽车产业链中涉及到新能源汽车的保险产品、保险销售、理赔服务等多个环节。财产保险覆盖了新能源汽车的车辆本身，还可以覆盖新能源汽车相关的设备和配件。我们选取了部分具有代表性的企业列示如下。

Regarding the financial services, the NEV industry primarily involves financing services and insurance services. Financing services encompass policy support, financial products, energy finance, and financing channels. In the financial domain, the NEV industry should fully leverage policy support, financial products, and financing channels to meet the funding needs of enterprises and consumers, thereby promoting the healthy development of the industry. Insurance services within the NEV industry chain cover insurance products, insurance sales, and claims services related to NEV. Property insurance not only covers the vehicles themselves but can also extend to equipment and accessories associated with NEV. We selected some representative enterprises as follows.



发展现状及成果 Development status and achievements

2023年2月28日，《重庆市绿色金融服务绿色汽车供应链指南（试行）》印发，其中提出强化对汽车产业转型升级的支持。工商银行重庆市分行实现贸易背景等信息的全线上传，线上经销商融资一点对全国。

On February 28, 2023, "Chongqing Green Finance Service Green Automobile Supply Chain Guide (Trial)" was issued, which proposes to strengthen support for the transformation and upgrading of the automobile industry. The Chongqing Branch of ICBC has realized the transmission of trade background and other information online, and the online dealer financing has been applied to the whole country.

短板 Areas for improvement

充电桩企业融资困难，充电桩管理成本高，担保方式难创新，传统充电桩面临技术路线替代风险。充电设施保险产品及制度不完善，充电设施安全风险隐患大，相关风险意识及保险保障有待加强。重庆银行业及保险业机构关于新能源汽车的授信政策和管理流程不够成熟，考核激励和资源倾斜力度不足。

Charging station companies face challenges in financing, high management costs, difficulties in innovative guarantee methods, and the risk of traditional charging stations being replaced by new technological routes. The insurance products and systems related to charging facilities are incomplete, and there are significant safety risks associated with charging infrastructure. Strengthening risk awareness and insurance coverage is necessary. Additionally, the credit policies and management processes of Chongqing's banking and insurance institutions regarding NEV need further maturity, and there is insufficient emphasis on assessment incentives and resource allocation.

发展趋势及政策规划 Development trend and policy planning

授信政策和考核激励支持力度日益加大。当前重庆银行业机构正主动对接和跟进充电设施相关企业贷款需求，量身定制差异化授信方案。金融产品和服务模式不断创新，特色信贷产品创新不断创新。重庆保险业机构根据充电设施建设需要，结合相关应用场景，积极开发充电设施相关保险产品。大力支持充电桩运营行业头部企业。

Credit policies and incentives for assessment support are increasingly strengthened. Currently, banking institutions in Chongqing are proactively engaging with and following up on the loan requirements of companies related to charging facilities, tailoring differentiated credit solutions. There is continuous innovation in financial product and service models, including innovative credit products. Chongqing's insurance institutions are actively developing insurance products related to charging facilities based on construction needs and relevant application scenarios, providing strong support to leading companies in the charging station operation industry.

企业声音

Enterprise voice

安永对重庆市部分重点新能源汽车产业链所在企业进行了实地走访，有企业反馈：相比上海，重庆贷款利率较低，贷款成本低。对会计师事务所的服务也很满意。但在保险理赔速度、专业度等方面与外地保险企业没有明显差别，优势不明显。

EY performed on-field interview on some key enterprises in Chongqing who involving in NEV industry chain. Some respondents mentioned that: Compared to Shanghai, Chongqing offers lower loan interest rates and reduced borrowing costs. These companies are also satisfied with the services provided by accounting firms. However, in terms of insurance claim processing speed and professionalism, there is no significant difference compared to insurance companies from other regions, and the advantages are not pronounced.

安永建议

EY Recommendation

鼓励银行保险机构创新充电设施金融产品和服务，开发适合充电设施的信贷产品和保险产品，通过投贷联动、银保合作、联合授信等方式加大充电基础设施建设金融支持力度；加大对充电设施运营企业的财政补贴力度，优化财政补贴方式，建立与充电设施利用率、服务质量挂钩的运营补贴标准；搭建充电基础设施发展规划重点项目、企业白名单等信息共享机制和平台，加强政府、银行保险机构、企业数据对接，通过大数据、智能化技术开发政银企互动场景，搭建线上融资服务支持平台；加强充电设施生产、建设、运营、使用全过程安全管理，提升充电设施运营企业及使用方安全意识，加大充电设施相关保险知识和保险产品宣传推广，发挥保险机制的风险保障作用；加强对保险公司的管理，在理赔定损等方面引入AI技术，提高理赔定损效率；联合保险协会组织本地保险企业前往上海、深圳等超一线城市学习，提升保险人员专业度。

Encourage banking and insurance institutions to innovate financial products and services related to charging facilities. Develop credit and insurance products tailored for charging infrastructure. Increase financial support for charging infrastructure construction through mechanisms such as investment and loans, collaboration between banks and insurance companies, and joint credit. Enhance fiscal subsidies for charging facility operators, optimize subsidy methods, and establish operational subsidy standards linked to utilization rates and service quality. Create information-sharing mechanisms and platforms for key charging infrastructure development projects and enterprise whitelists. Strengthen data exchange between government, banks, insurance institutions, and companies using big data and intelligent technology to develop online financing support platforms. Improve safety management throughout the entire lifecycle of charging facilities, raise awareness of safety among charging facility operators and users, and promote insurance knowledge and products related to charging facilities. Leverage insurance mechanisms for risk protection. Enhance management of insurance companies by introducing AI technology in areas such as claims assessment and loss adjustment. Collaborate with insurance associations to organize local insurance companies' visits to top-tier cities like Shanghai and Shenzhen to enhance the professionalism of insurance personnel.

节能与环保服务

Energy-saving and Environmental Protection Services

简介 Introduction

在节能与环保服务配套方面，新能源汽车产业链主要涉及回收与利用服务、节能技术和产品推广服务。回收与利用服务：目前动力电池主要通过三种渠道进行回收，第一种回收路径为废旧动力电池通过电动汽车经销商回收；第二种回收路径为通过电池租赁公司回收，废旧动力电池经过上述两种回收路径最终流向动力电池生产商进行回收处理；第三种回收路径为第三方回收公司依靠自主建立的动力电池回收网点进行回收处理。节能技术和产品推广服务：帮助新能源汽车制造商和相关企业推广和应用先进的节能技术，包括电池技术、电机技术、轻量化材料等。节能技术和产品推广服务还可以帮助新能源汽车企业进行市场推广。我们选取了部分具有代表性的企业列示如下。

Regarding the energy saving and environmental protection services, the NEV industry chain mainly involves recycling and utilization services, energy-saving technologies and product promotion services. Recycling and utilization services: At present, power batteries are mainly recycled through three channels, the first recycling path is used power batteries through electric vehicle dealers; The second recycling path is through the battery leasing company recycling, waste power batteries through the above two recycling paths and finally flow to the power battery manufacturer for recycling treatment; The third recycling path is for third-party recycling companies to rely on independently established power battery recycling outlets for recycling. Energy-saving technology and product promotion services: Help NEV manufacturers and related enterprises to promote and apply advanced energy-saving technologies, including battery technology, motor technology, lightweight materials, etc. energy-saving technology and product promotion services can also help NEV enterprises to carry out market promotion. We selected some representative enterprises as follows.



发展现状及成果 Development status and achievements

2023年1月6日，重庆大足区举行新能源动力电池综合利用项目签约仪式，国内新能源动力电池综合利用行业头部企业江西环锂科技有限公司正式落户重庆大足。江西环锂大足项目总投资106亿元，建成后可实现年拆解10万台新能源报废汽车、年处理15万吨退役电池、梯次利用年产2.5GWh储能模块(电芯)、再生利用年产3万吨电池级氢氧化锂及碳酸锂等生产线。

On January 6, 2023, Chongqing Dazu District held a signing ceremony for the comprehensive utilization project of new energy power batteries. Jiangxi Huanlithium Technology Co., Ltd., a leading domestic enterprise in the field of comprehensive utilization of new energy power batteries, officially settled in Chongqing Dazu. The Jiangxi Huanlithium Dazu project has a total investment of 10.6 billion yuan and, once completed, will achieve the annual disassembly of 100,000 scrapped NEV, process 150,000 tons of retired batteries, produce 2.5 GWh energy storage modules (battery cells) through hierarchical utilization, and recycle 30,000 tons of battery-grade lithium hydroxide and lithium carbonate annually.

发展趋势及政策规划 Development trend and policy planning

依据《重庆市推进智能网联新能源汽车基础设施建设及服务行动计划（2022-2025年）》、《重庆市推进制造业绿色低碳发展实施方案》，到2025年底，培育1家动力电池回收利用行业头部企业，建成国家级动力电池回收利用科研及产业化平台。到2027年，再生资源行业培育规范条件企业达到30家以上。在汽车、水泥等重点产业领域打造工业资源循环利用产业链，按照“横向耦合、纵向延伸、循环链接”原则建设引进关键项目，促进项目间、企业间、产业间物料闭路循环。推进退役动力电池在储能、备电、充换电等领域梯次利用，推进光伏组件、风电机组叶片等新兴固体废弃物资源化利用，围绕废钢、废旧轮胎、废塑料、废旧动力电池等主要再生资源行业，不断扩大规范条件企业覆盖面，完善公告企业动态监管长效机制。

According to the "Chongqing Action Plan for Promoting the Construction of Intelligent Networked NEV Infrastructure (2022-2025)" and the "Chongqing Implementation Plan for Promoting Green and Low-Carbon Development in Manufacturing Industry," by the end of 2025, one leading enterprise in the power battery recycling and utilization industry will be cultivated, and a national-level research and industrialization platform for power battery recycling and utilization will be established. By 2027, more than 30 standardized enterprises in the renewable resources industry will be nurtured. In key industries such as automobiles and cement, an industrial resource recycling chain will be developed, following the principles of "horizontal coupling, vertical extension, and circular linkage," with the introduction of key projects to promote closed-loop material circulation between projects, enterprises, and industries. Efforts will be made to advance the secondary utilization of retired power batteries in fields such as energy storage, backup power, and charging and discharging. Additionally, emerging solid waste resources such as photovoltaic components and wind turbine blades will be utilized. The focus will be on major recycling industries such as scrap steel, used tires, plastic waste, and discarded power batteries, with continuous expansion of the coverage of standardized enterprises and improvement of long-term dynamic supervision mechanisms for publicly announced companies.

企业声音

Enterprise voice

安永对重庆市部分重点新能源汽车产业链所在企业进行了实地走访，有企业反馈：合作的供应商专注于废水站的运营、处置和监测等领域，均为重庆本地企业，其专业资质和价格水平得到了受访企业的肯定。然而，受访企业对于目前危险废物处置的高成本表现出不满。

EY performed on-field interview on some key enterprises in Chongqing who involving in NEV industry chain. Some respondents mentioned that their collaborating suppliers focus on the operation, disposal, and monitoring of wastewater stations. These suppliers are all local Chongqing-based enterprises, and their professional qualifications and pricing levels have been acknowledged by the interviewed companies. However, the interviewed companies expressed dissatisfaction with the high costs associated with hazardous waste disposal at present.

安永建议

EY Recommendation

组织开展危险废物处置成本调查，政府层面出台主要危险废物处置方式或主要危险废物种类的处置成本核算方法指导性文件，关注危险品处置价格；与危险品处置公司协商，给予新能源汽车产业相关企业优惠，降低企业危险品处置成本；实施部门联动管理监督，利用信息手段提升危险废物处置收费政策制定和执行成效，生态环境部门将成本核算、合同价格等信息纳入固体废物管理信息系统。

Organizations conduct a cost investigation for hazardous waste disposal. At the government level, guidance documents are issued regarding the cost calculation methods for major hazardous waste disposal methods or specific types of hazardous waste. Attention is given to the pricing of hazardous waste disposal. Negotiations with hazardous waste disposal companies aim to provide incentives and reduce disposal costs for enterprises in the NEV industry. Interdepartmental management supervision is implemented, utilizing information tools to enhance the development and execution of hazardous waste disposal fee policies. The Ministry of Ecology and Environment incorporates cost accounting and contract prices into the solid waste management information system.

生产性租赁服务

Productive Leasing Services

简介 Introduction

在生产性租赁服务配套方面，新能源汽车产业主要涉及融资租赁服务和经营租赁服务。融资租赁在新能源汽车产业的工厂发展中为企业提供了灵活的资金支持。经营租赁服务为新能源汽车制造商提供了更广阔的市场。制造商可以通过与租赁公司合作，将大量新能源汽车投放到租赁市场，扩大销售渠道，提高产品知名度，促进销售增长。租赁公司通常会提供全方位的服务，包括充电、维护、保险等，让用户在使用新能源汽车的过程中更加便捷。厂房及设备租赁为新能源汽车制造企业提供了灵活的生产扩张方式。我们选取了部分具有代表性的企业列示如下。

Regarding the supporting productive leasing services, the NEV industry mainly involves financial leasing services and operating leasing services. Financial leasing provides flexible financial support for enterprises in the development of factories in the NEV industry. Operating lease services provide a broader market for NEV manufacturers. Manufacturers can cooperate with rental companies to put a large number of NEV into the rental market, expand sales channels, improve product awareness and promote sales growth. Leasing companies usually provide a full range of services, including charging, maintenance, insurance and so on, so that users can use NEV more conveniently. Plant and equipment leasing provides NEV manufacturing enterprises with flexible production and expansion methods. We selected some representative enterprises as follows.



发展现状及成果 Development status and achievements

融资租赁：重庆鈇渝金融租赁股份有限公司通过直接租赁方式，向庆铃汽车集团采购的13台新能源电动载重轻卡在重庆顺利完成验收。该项目将以专业绿色物流企业运升合和公司作为承租人，将车辆运至攀枝花交付攀钢集团使用。该项目是鈇渝金租首笔新能源汽车直接租赁项目，为支持重庆本土汽车制造企业深度参与央企绿色物流作出了有益探索。

Financial leasing: Chongqing BSIDES Financial Leasing Co., Ltd. has successfully completed acceptance inspection of 13 new energy electric light trucks purchased from Qingling Automobile Group through direct leasing in Chongqing. The project will use Yunsheng Hehe Company, a professional green logistics enterprise, as the lessee to transport the vehicles to Panzhihua for delivery to Panzhihua Steel Group. This project is the first NEV direct leasing project of BSIDES, which has made a beneficial exploration to support local automobile manufacturing enterprises in Chongqing to deeply participate in the green logistics of central enterprises.

两江开发投资集团及重庆睿蓝汽车制造有限公司共同于2015年，与重庆小康控股有限公司、赛力斯集团分别设立了重庆新能源汽车融资租赁有限公司及新能源汽车产业发展（重庆）有限公司，旨在搭建新能源汽车产业的产融结合平台，助推重庆汽车生产制造企业在新能源汽车领域的发展，做实重庆新能源汽车推广应用示范，扩大重庆在全国新能源汽车产业中的影响力。重庆新能源汽车融资租赁有限公司与远成物流、五龙动力等知名企业开展了新能源汽车相关设备设施融资租赁业务。

Liangjiang Development and Investment Group and Chongqing Ruilan Automobile Manufacturing Co., Ltd. jointly established Chongqing New Energy Automobile Finance Leasing Co., Ltd. and New Energy Vehicle Industry Development (Chongqing) Co., Ltd. with Chongqing Sokon Holding Company Limited and Seres Group in 2015, aiming to build an industrial and financial integration platform for the NEV industry and promote the development of Chongqing automobile manufacturing enterprises in the field of NEV, Strengthen the promotion and application demonstration of Chongqing's NEV and expand Chongqing's influence in the national NEV industry. Chongqing New Energy Automobile Finance Leasing Co., Ltd. has carried out NEV related equipment and facilities finance leasing business with well-known enterprises such as Yuancheng Logistics and Wulong Power.

安永建议

EY Recommendation

安永建议与金融机构合作，细化生产性融资租赁服务的申请细则，制定行业规范，并在“渝快办”等平台进行公示，让企业在申请生产性融资租赁服务时有据可依；简化生产性融资租赁服务审批流程，开通绿色通道，加快审批速度；根据企业的实际需求，对生产性融资需求大的新能源车企提供定制化的融资方案，增设相关热线，解答企业困惑。

EY recommends collaborating with financial institutions to refine the application guidelines for production leasing services, establish industry standards, and publicly announce them on platforms such as 'Yukuaiiban' (Chongqing Express Service Center). This ensures that enterprises have clear guidelines when applying for production leasing services. Additionally, streamlining the approval process for production leasing services, creating a green channel, and expediting approval speeds are essential steps. Furthermore, customized financing solutions should be provided to NEV companies with significant production financing needs. Establishing dedicated hotlines to address enterprise queries is also recommended.

商务服务

Business Services

简介 Introduction

在商务服务配套方面，新能源汽车产业主要涉及供应链管理服务、会议展览服务、市场调查服务、广告服务、安保服务。供应链管理服务：新能源汽车产业的供应链是一个复杂的体系，涉及到从零部件制造到整车生产的各个环节。包括电池供应链、零部件供应链、整车制造供应链、物流与配送等。会议展览服务：会议展览服务是促进新能源汽车产业交流合作、推广产品和技术的重要平台。包括行业展会、技术交流会议、政策研讨会、贸易展览会等。市场调查服务可以通过问卷调查、访谈等方式，了解消费者对新能源汽车的认知、购买意愿、使用需求等信息，帮助企业了解消费者的需求和偏好，帮助企业制定战略决策、推动产品创新。广告服务包括品牌推广、产品宣传、营销推广、品牌形象塑造。通过广告合作，企业可以与各种合作伙伴，如经销商、零部件供应商、金融机构等建立合作关系。安保服务包括物理安全保障、数据安全保障、知识产权保护、人员安全保障、风险评估和管理。对于新能源汽车生产环节来说，安保服务可以确保生产设施、生产线、原材料等的安全。我们选取了部分具有代表性的企业列示如下。

Regarding the business service support, the NEV industry mainly involves supply chain management services, conference and exhibition services, market research services, advertising services and security services. Supply chain management service: the supply chain of the NEV industry is a complex system, involving all links from component manufacturing to vehicle production. Including battery supply chain, parts supply chain, vehicle manufacturing supply chain, logistics and distribution. Conference and exhibition services: Conference and exhibition services are an important platform for promoting exchange and cooperation in the NEV industry and promoting products and technologies. Including industry exhibitions, technical exchange meetings, policy seminars, trade fairs and so on. Market survey services can understand consumers' awareness, purchase willingness, use demand and other information on NEV through questionnaires, interviews and other ways, help enterprises understand consumers' needs and preferences, help enterprises make strategic decisions and promote product innovation. Advertising services include brand promotion, product promotion, marketing promotion and brand image building. Through advertising cooperation, enterprises can establish cooperative relationships with various partners, such as distributors, parts suppliers, financial institutions and so on. Security services include physical security, data security, intellectual property protection, personnel security, risk assessment and management. For the production link of NEV, security services can ensure the safety of production facilities, production lines, raw materials, etc. We selected some representative enterprises as follows.



发展现状及成果 Development status and achievements

2023年12月22日，璧山区举办智能网联新能源汽车供应链对接活动。同时，璧山高新区管委会与比亚迪、青山工业、辰致科技、蓝黛、龙润等8家代表企业签订了制造业高质量发展供应链配套协议，共同推动智能网联新能源汽车核心零部件产业整零协同、聚链成群发展，着力提升产业链供应链韧性和安全水平。

On December 22, 2023, Bishan District held a supply chain matchmaking event for intelligent connected NEV. Simultaneously, the Bishan High-tech Zone Management Committee signed manufacturing high-quality development supply chain agreements with eight representative companies, including BYD, Qingshan Industry, Chenzhi Technology, Landai, and Longrun. Together, they aim to promote collaborative development in the core components industry of intelligent connected NEV, enhance supply chain resilience, and improve safety levels.

2023第二届西南（重庆）国际汽车博览会暨新能源智能汽车展览会于2023年9月29日至10月03日在重庆国际博览中心举行。展会紧跟国家对激发新消费需求的战略部署，打造颇具影响力的汽车品牌盛会，促进成渝经济圈绿色交通生态建设。

The 2nd Southwest (Chongqing) International Automobile Expo and New Energy Intelligent Automobile Exhibition 2023 was held in Chongqing International Expo Center from September 29 to October 03, 2023. The exhibition closely follows the national strategic deployment to stimulate new consumer demand, builds an influential automobile brand event, and promotes the green transportation ecological construction of Chengdu-Chongqing Economic Circle.

2024年3月13日至15日，由重庆汽车工程学会、长安汽车、赛力斯集团等单位共同主办的2024中国智能电动汽车科技与供应链展览会在重庆国际博览中心举办。展会聚焦拥抱智电汽车科技新时代的主题，围绕全球智电汽车前瞻科技及产业链创新解决方案等板块，全方位呈现智电汽车产业的热点和硬核实力。

From March 13 to 15, 2024, the 2024 China Intelligent Electric Vehicle Technology and Supply Chain Exhibition jointly sponsored by Chongqing Automobile Engineering Society, Chang'an Automobile, Seres Group and other units was held in Chongqing International Expo Center. Focusing on the theme of embracing the new era of smart car technology, the exhibition presents the hot spots and hard core strength of the smart car industry in an all-round way around the global smart car forward-looking technology and industrial chain innovative solutions.

安永建议

EY Recommendation

实施定制化的供应链解决方案，以确保零部件的及时供应和生产效率的提升，加强监管和政策支持，推动新能源汽车产业链协同发展；了解消费者需求和市场趋势，为企业 提供市场定位和战略规划的支持，政府可以提供数据支持和政策引导，促进新能源汽车市场的健康发展；新能源车企应定期针对新能源汽车销售者进行问卷调查，以了解消费者需求，及时更新产品；新能源车企应与广告公司合作，通过地铁站等线下渠道及视频软件等线上渠道，推广宣传新能源汽车。

To implement customized supply chain solutions, ensuring timely supply of components and improving production efficiency, strengthening supervision and policy support, and promoting the coordinated development of the NEV industry chain; understanding consumer needs and market trends, providing market positioning and strategic planning support for enterprises, and the government can provide data support and policy guidance to promote the healthy development of the NEV market; NEV companies should regularly conduct surveys of NEV consumers to understand their needs and promptly update products; NEV companies should collaborate with advertising agencies to promote and advertise NEV through offline channels such as subway stations and online channels such as video software.

人力资源管理及职业教育培训服务

Human Resource Management and Vocational Education Training Services

简介 Introduction

在人力资源管理及职业教育培训服务配套方面，新能源汽车产业涉及职业中介服务、劳务派遣服务及教育培训服务。职业中介服务机构可以帮助企业快速找到需要的专业人才。劳务派遣服务机构可以为企业提供灵活的用工解决方案，及时提供符合要求的临时工、短期工和长期工。职业教育培训服务包括人才需求、职业教育培训、跨学科人才培养、产学研结合、持续学习与职业发展。我们选取了部分具有代表性的企业列示如下。

Regarding the human resource management and vocational education and training services, the NEV industry involves vocational intermediary services, labor dispatch services, and educational training services. Vocational intermediary service agencies can assist companies in quickly finding the specialized talent they need. Labor dispatch service agencies can provide flexible employment solutions to enterprises, promptly supplying qualified temporary, short-term, and long-term workers. Vocational education and training services include talent demand assessment, vocational education and training, interdisciplinary talent cultivation, industry-academia-research collaboration, and continuous learning for career development. We selected some representative enterprises as follows.



发展现状及成果 Development status and achievements

重庆软件园联合西部智联、重庆邮电大学、重庆交通大学、北京德普教育等多个产学研机构单位，共同签约成立“智能网联产业人才培养联合体”。接下来，签约各方将以联合体为抓手，促进多方资源深度融合，以人才战略助力全市“33618”现代制造业集群体系建设，重点推动3个万亿级产业集群和3个千亿级产业实现生态繁荣，搭建人才供给体系。

The Chongqing Software Park, in collaboration with Western Talent Alliance, Chongqing University of Posts and Telecommunications, Chongqing Jiaotong University, and Beijing Depp Education, has jointly established the "Intelligent Connected Industry Talent Development Consortium". Going forward, the signatory parties will leverage this consortium to facilitate deep integration of resources, strategically enhance talent development, and contribute to the construction of Chongqing's "33618" modern manufacturing industry cluster system. The focus will be on promoting the ecological prosperity of three trillion-level (in RMB) industrial clusters and three hundred-billion-level (in RMB) industries, while establishing a robust talent supply system.

短板 Areas for improvement

受制于高端人才培养招生名额少，人才引留比较优势不突出等因素，在自动驾驶、云计算、芯片等领域，创新型、高端型、复合型人才严重不足。政产学研用衔接融合机制尚不健全，创新驱动能级不高。

Due to the small number of enrollment quotas for high-end talent cultivation and the lack of outstanding comparative advantages in talent attraction and retention, there is a serious shortage of innovative, high-end and composite talents in automatic driving, cloud computing, chips and other fields. The convergence mechanism of government, industry, university and research is not perfect, and the innovation driving level is not high.

发展趋势及政策规划 Development trend and policy planning

《重庆市建设世界级智能网联新能源汽车产业集群发展规划（2022—2030年）》要求加强关键人才引育。支持企业与高校、科研院所加强合作，加快引进和培养软件架构师、车规级芯片设计师、卓越工程师等紧缺高级人才，以及汽车软件、轻量化和电池原材料等基础研发人才。《重庆智能网联新能源汽车零部件产业集群提升专项行动方案（2023—2027年）》提到，到2027年，重庆智能网联新能源汽车零部件领域预计引进国家级人才工程项目专家500人、急需紧缺人才5万人，累计将培养本科、专科、中职毕业生32万人。

"Chongqing Development Plan for Building a World-level Intelligent Network Connected NEV Industry Cluster (2022-2030)" supports enterprises to strengthen cooperation with universities and scientific research institutes, and accelerate the introduction and training of software architects, vehicle-level chip designers, outstanding engineers and other scarce senior talents, as well as basic R&D talents such as automotive software, lightweight and battery raw materials. "Chongqing Intelligent network NEV parts industrial cluster promotion special action plan (2023-2027)" mentioned that by 2027, Chongqing intelligent network NEV parts field is expected to introduce national talent project experts 500 people, urgently needed talents 50,000 people, a total of undergraduate, junior college, secondary vocational graduates of 320,000.

企业声音 Enterprise voice

Enterprise voice

安永对重庆市部分重点新能源汽车产业链所在企业进行了实地走访，有企业反馈：重庆本地缺少可立即能用的高端人才，主要靠企业自己培养。重庆本地薪资水平低于沿海地区，导致重庆本地高校培养的毕业生流失严重。重庆本地猎头少，需要靠企业自己寻找高端人才。在人才吸引政策上，针对引进高端人才的鼓励政策较多，但针对大学生及中端人才政策少。

EY performed on-field interview on some key enterprises in Chongqing who involving in NEV industry chain. Some respondents mentioned that Chongqing lacks high-end talents that can be immediately used locally, and mainly relies on enterprises to cultivate themselves. Chongqing's local wages are lower than those in coastal areas, leading to a serious loss of graduates trained by local universities in Chongqing. There are few local headhunters in Chongqing, and enterprises need to find high-end talents by themselves. In terms of talent attraction policies, there are more incentive policies for the introduction of high-end talents, but there are fewer policies for college students and mid-end talents.

安永建议 EY Recommendation

EY Recommendation

用好人才引进政策，为新能源汽车企业提供人才支撑；支持出口企业人才申报新重庆引才计划等引才政策，对符合条件的高层次人才、大学生、中端人才，从人才奖励、生活补助和住房保障等方面激励支持；编制发布人才需求目录，鼓励企业和科研院校对高端人才实行“双聘制”，吸引和集聚高层次人才；支持企业之间、企业与科研院校之间加强合作，大力培育创新创业领军人才和示范团队、专业技能人才等；持续加大人才引进培养力度，依托“英才计划”，重点瞄准智能网联技术、软件技术、“汽车+IT+通信”、汽车营销等领域复合型人才以及产业战略发展型人才开展定向引培；联合本地人力资源企业，培养本地猎头，定期对猎头进行培训，并学习沿海城市优秀猎头培训经验；对行业用工数据进行统计，分析订单激增周期，对用工需求提前预警，避免临时性用工短缺。

To support NEV companies, talent introduction policies are employed. These policies include supporting export enterprises in talent application for the New Chongqing Talent Attraction Plan. Qualified high-level talents, university graduates, and mid-level professionals are incentivized through talent rewards, living allowances, and housing security. Additionally, a talent demand catalog is compiled and published. Encouraging enterprises and research institutions to implement a 'dual employment' system for high-end talents helps attract and consolidate top-tier professionals. Strengthening collaboration between companies and research institutions fosters innovation, entrepreneurial leadership, and specialized skills. Continuous efforts are made to enhance talent introduction and cultivation. Leveraging the 'Talents Program,' targeted training focuses on multidisciplinary talents in areas such as intelligent connected technology, software, automotive IT, and marketing. Collaborating with local human resources companies, training local headhunters, and learning from successful headhunting practices in coastal cities are also part of the strategy. Analyzing industry employment data and predicting increased order cycles help prevent temporary labor shortages.

批发与贸易经纪代理服务

Wholesale and Trade Brokerage Services

简介 Introduction

在批发与贸易经纪代理服务配套方面，新能源汽车产业涉及零部件批发、供应链管理、市场销售支持、贸易经纪代理等服务。

Regarding the wholesale and trade brokerage services, the NEV industry encompasses various aspects, including component wholesale, supply chain management, market sales support, and trade brokerage.

批发服务供应商通常与新能源汽车制造商或经销商合作，从制造商处购买新能源汽车产品，并将其批发给经销商、零售商或其他渠道商。批发服务商还可能提供新能源汽车所需的配件和零部件的批发服务，包括电池、电动机、控制系统等。批发服务商可能涉及供应链管理，包括库存管理、订单处理、物流和配送等，以确保新能源汽车产品和零部件能够及时、高效地流通到各个销售点。此外，其可能提供市场营销支持，包括广告和促销资料的提供、市场推广活动的支持等，以帮助经销商和零售商促进新能源汽车产品的销售。

Wholesale service providers typically collaborate with NEV manufacturers or dealers. They purchase NEV products directly from manufacturers and then distribute them to dealers, retailers, or other channel partners. These wholesale service providers may also offer components and parts necessary for NEV, including batteries, electric motors, and control systems. Additionally, they may be involved in supply chain management, including inventory management, order processing, logistics, and distribution, ensuring efficient circulation of NEV products and parts to various sales points. Furthermore, these providers may offer marketing support, including providing advertising materials, supporting marketing campaigns, and assisting dealers and retailers in promoting NEV products.

贸易经纪代理服务主要涉及贸易代理、经济代理、市场开拓、贸易融资、贸易法律咨询。贸易经济代理服务中提供商可以作为中介，代表新能源汽车制造商或经销商进行国际贸易活动，包括谈判合同、制定贸易条款、处理报关手续等。贸易经济代理服务可能涉及经济代理，代表客户进行经济活动，包括资金管理、投资、财务规划等，以支持新能源汽车产业链中的资金流动和投资。贸易经济代理服务商可以协助新能源汽车制造商或经销商开拓新市场，包括进行市场调研、寻找合作伙伴、推广产品等，以扩大销售渠道和增加市场份额。贸易经济代理服务可以提供贸易融资服务，包括为新能源汽车产业链中的贸易活动提供资金支持，以满足资金需求并降低交易风险。贸易经济代理服务可能提供贸易法律咨询，包括帮助客户了解国际贸易法规、处理贸易纠纷、规避贸易风险等，以确保贸易活动的合规性和稳定性。

In terms of wholesale and trade brokerage services, the NEV industry encompasses various aspects, including component wholesale, supply chain management, market sales support, and trade brokerage. Wholesale service providers typically collaborate with NEV manufacturers or dealers. They purchase NEV products directly from manufacturers and then distribute them to dealers, retailers, or other channel partners. These wholesale service providers may also offer components and parts necessary for NEV, including batteries, electric motors, and control systems. Additionally, they may be involved in supply chain management, including inventory management, order processing, logistics, and distribution, ensuring efficient circulation of NEV products and parts to various sales points. Furthermore, these providers may offer marketing support, including providing advertising materials, supporting marketing campaigns, and assisting dealers and retailers in promoting NEV products.

我们选取了部分具有代表性的企业列示如右。

We selected some representative enterprises as follows.



短板 Areas for improvement

新能源汽车行业普遍存在配件批发难的问题，由于各新能源汽车品牌基本都自主研发配件，并不像传统燃油车存在同质配件或非原厂可以替代的配件，造成消费者只能在指定零配件供应商处更换零配件。目前大多新能源汽车品牌在售后环节上都采取的自营的方式，总体来看零配件流转的效率较低。新能源车产品的迭代速度明显高于传统燃油车，造成现款产品使用的零配件大概率不能在下一代产品或者是其他车系车型上使用，这样一来零配件的流通效率也会很低。

In the NEV industry, there is a common challenge related to wholesale difficulties for components. Unlike traditional fuel-powered cars, where interchangeable or non-original parts are readily available, most NEV brands develop their own components. As a result, consumers are often limited to replacing parts only through designated suppliers. Currently, many NEV brands adopt a self-operated approach in their after-sales services, which, overall, leads to inefficient circulation of spare parts. The rapid pace of product iteration in the NEV sector further exacerbates this issue. Parts used in existing models are often incompatible with the next generation of vehicles or other models within the same series, resulting in low efficiency in the distribution of spare parts.

安永建议

EY Recommendation

与各大新能源汽车车企协商，一同制定新能源汽车零配件通用标准，针对非关键零配件形成统一的模具模板；号召各新能源车企开放自研零配件批发，运行经销商向修理厂批发分销自研零配件，提高零配件流转效率；对于同品牌新能源汽车零配件，在更新迭代的同时，尽量保持零部件规格的统一；重庆还应对批发与贸易经纪代理服务加大扶持力度，在用地、税收等方面给予一定优惠。

In collaboration with major electric vehicle manufacturers, a common standard for electric vehicle spare parts is being jointly developed. For non-critical spare parts, a unified template for molds is being established. There is also a call for electric vehicle manufacturers to open up their proprietary spare parts for wholesale distribution. Operating dealerships can then distribute these self-developed spare parts to repair shops, thereby enhancing the efficiency of spare parts circulation. Additionally, for spare parts of the same brand of electric vehicles, efforts are being made to maintain uniform specifications during updates and iterations. In Chongqing, further support is being provided for wholesale and trade brokerage services, including certain incentives related to land use and taxation.

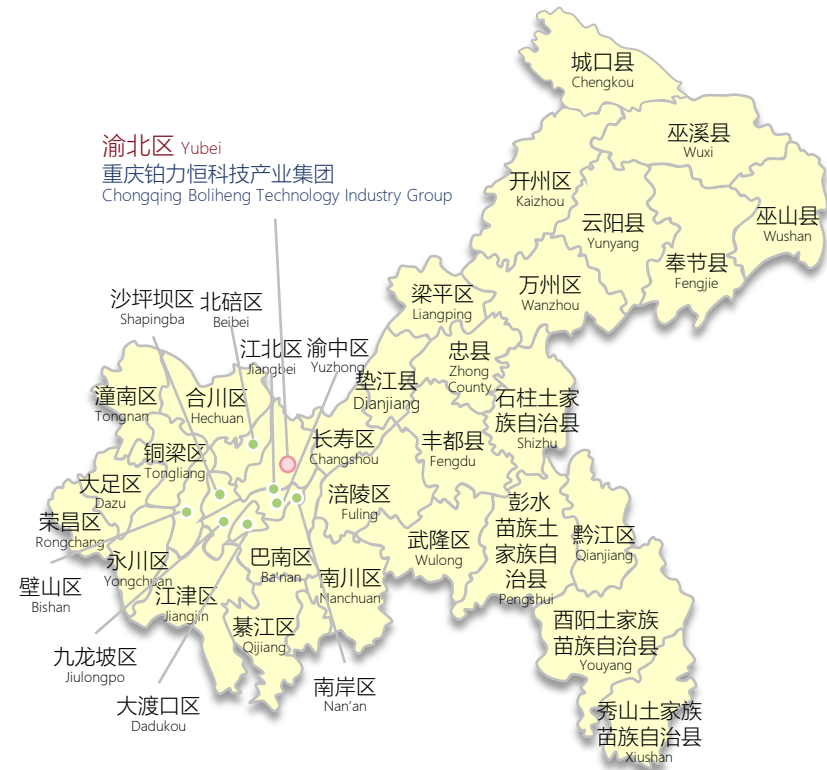
生产性支持服务

Productive Support Services

简介 Introduction

在生产性支持服务配套方面，新能源汽车产业主要涉及汽车修理和售后服务、生产设备修理及维护服务。汽车修理和售后服务包括新能源汽车专业维修技术、电池维护与更换、售后技术支持、配件供应与管理、安全意识与培训。生产设备修理及维护服务涵盖了对生产线所需设备的维护、保养和修理工作。我们选取了部分具有代表性的企业列示如下。

Regarding the production support services, the NEV industry mainly involves vehicle repair and after-sales service and production equipment repair and maintenance services. Automobile repair and after-sales service includes NEV professional maintenance technology, battery maintenance and replacement, after-sales technical support, spare parts supply and management, safety awareness and training. Production equipment repair and maintenance services cover the maintenance, maintenance and repair of equipment required for production lines. We selected some representative enterprises as follows.



发展现状及成果 Development status and achievements

2023年3月18日，由重庆铂力恒科技产业集团有限公司发起，六十多家汽车维修企业共同参与的“新能源汽车维修产业发展峰会”在重庆渝北区落下帷幕。2023年铂力恒已经签约十几家网约车平台，仅在重庆市有近4万台保有量，需要更密集的网点提供维修服务。集团签约了几家新能源汽车生产厂家和一线电池厂家的特约技术服务商。

On March 18, 2023, the "NEV Maintenance Industry Development Summit" initiated by Chongqing Boliheng Technology Industry Group Co., Ltd. and participated by more than 60 automobile maintenance enterprises came to an end in Yubei District of Chongqing. In 2023, Boliheng has signed a dozen network car-hailing platforms, and there are nearly 40,000 units in Chongqing alone, requiring more intensive outlets to provide maintenance services. The group has signed several NEV manufacturers and first-line battery manufacturers of special technical service providers.

短板 Areas for improvement

重庆新能源汽车在配套设备方面，依然存在充电桩充电较慢、运维质量不高、充电桩分布不均衡等问题。充电终端故障，部分企业巡视不到位，维护不及时，还存在短路、起火、损坏等安全隐患。新能源汽车出现了售后维修难的问题，新能源汽车电池一旦出现问题，只能通过厂商的质保解决，同时修理店缺乏对新能源汽车的修理技术。缺乏生产性支持服务企业，产业配套跟不上。

Regarding the NEV Infrastructure, problems such as slow charging, low operation and maintenance quality, and uneven distribution of charging piles still exist. Charging terminal failure, some enterprises are not in place, maintenance is not timely, there are also short circuit, fire, damage and other safety hazards. NEV have the problem of difficult after-sales maintenance, once the NEV battery has a problem, it can only be solved by the manufacturer's quality assurance, and the repair shop lacks the repair technology for NEV. Lack of productive support service enterprises, industrial support can not keep up.

发展趋势及政策规划 Development trend and policy planning

《重庆市推进智能网联新能源汽车基础设施建设及服务行动计划（2022-2025年）》提到，到2025年底，全市智能网联新能源汽车基础设施网络服务效率、技术能力、覆盖率将处于西部地区领先水平。预计建成充电桩超过24万个，新建小区充电桩覆盖率达到100%，中心城区具备条件的公共车位实现充电桩全覆盖，超快充网络、换电网络寻站半径原则上不超过5公里，高速公路服务区实现充电桩全覆盖。

"The Action Plan for Promoting the Construction and Service of Intelligent Net-Connected NEV Infrastructure in Chongqing (2022-2025)" mentioned that by the end of 2025, the city's intelligent net-connected NEV infrastructure network service efficiency, technical capability and coverage rate will be at the leading level in the western region. It is expected that more than 240,000 charging piles will be built, the coverage rate of charging piles in the new community will reach 100%, the public parking spaces in the central city with conditions will achieve full coverage of charging piles, the search radius of the ultra-fast charging network and the power exchange network will not exceed 5 kilometers in principle, and the charging piles will be fully covered in the highway service area.

企业声音 Enterprise voice

Enterprise voice

安永对重庆市部分重点新能源汽车产业链所在企业进行了实地走访，有企业反馈：重庆服务行业从业人员服务态度、服务意识相比沿海地区还有待加强。

EY performed on-field interview on some key enterprises in Chongqing who involving in NEV industry chain. Some respondents mentioned that the service attitude and awareness of service personnel in Chongqing's service industry need further improvement compared to coastal regions.

安永建议 EY Recommendation

EY Recommendation

摸清充换电设施配建情况，统筹推动新建停车场实现“位、桩”一体化建设，做好智慧停车管理平台和充换电平台的一体化建设和运行管理工作；对修理厂进行资质审核，选取修配能力强的修理厂，进行新能源车维修点试点，邀请汽车制造商修理人员入驻修理厂，提升修理厂对新能源汽车的维修能力。

To comprehensively promote the integrated construction of new parking lots to achieve a combination of parking spaces and charging stations, it is essential to assess the situation of charging and battery swap facilities. Additionally, efforts should be made to integrate and manage the smart parking management platform and the charging and battery swap platform. Furthermore, conducting qualification audits for repair shops and selecting repair facilities with strong repair capabilities will facilitate pilot projects for NEV maintenance. Inviting automotive manufacturers' repair personnel to work in these repair shops will enhance their ability to service NEV.

重庆本地的生产性支持服务企业规模和实力相对较小，需加大招商引资力度，给予此类企业用地等方面的优惠，同时推进本地企业转型，派专家对企业进行帮扶，发展本土生产性支持服务企业。

The scale and strength of local production support service enterprises in Chongqing are relatively small, so it is necessary to increase investment attraction, give such enterprises preferential land use and other aspects, promote the transformation of local enterprises, send experts to help enterprises, and develop local production support service enterprises.

小结

Debriefing

生产性服务业是制造业链条中的重要组成部分，是当前中国经济最具活力的产业，也是未来经济发展最具潜力的产业，它依附于制造业而存在，贯穿于企业生产的上游、中游和下游各环节中，以人力资本和知识资本作为主要投入品，把日益专业化的人力资本和知识资本引进制造业，是二三产业加速融合的关键环节。

Producer service industry is an important part of the manufacturing chain. It is the most dynamic industry in China's economy at present and also the industry with the most potential for flintelligent Connected depends on manufacturing industry and runs through the upstream, midstream and downstream links of enterprise production. With human capital and knowledge capital as the main inputs, it introduces increasingly specialized human capital and knowledge capital into manufacturing industry, It is a key link to accelerate the integration of secondary and tertiary industries.

近年来，中国生产性服务行业发展受到各级政府的高度重视和国家产业政策的重点支持。国家陆续出台了多项政策，鼓励生产性服务业发展与创新，为生产性服务行业的发展提供了明确、广阔的市场前景，为企业提供了良好的生产经营环境。我国生产性服务业加速迈向专业化，助推产业改造升级。随着供给侧结构性改革的深入推进和信息技术的快速发展，现代服务业加速崛起，成为拉动国民经济增长、促进生产生活方式转变、带动产业转型升级和协调发展的重要力量。

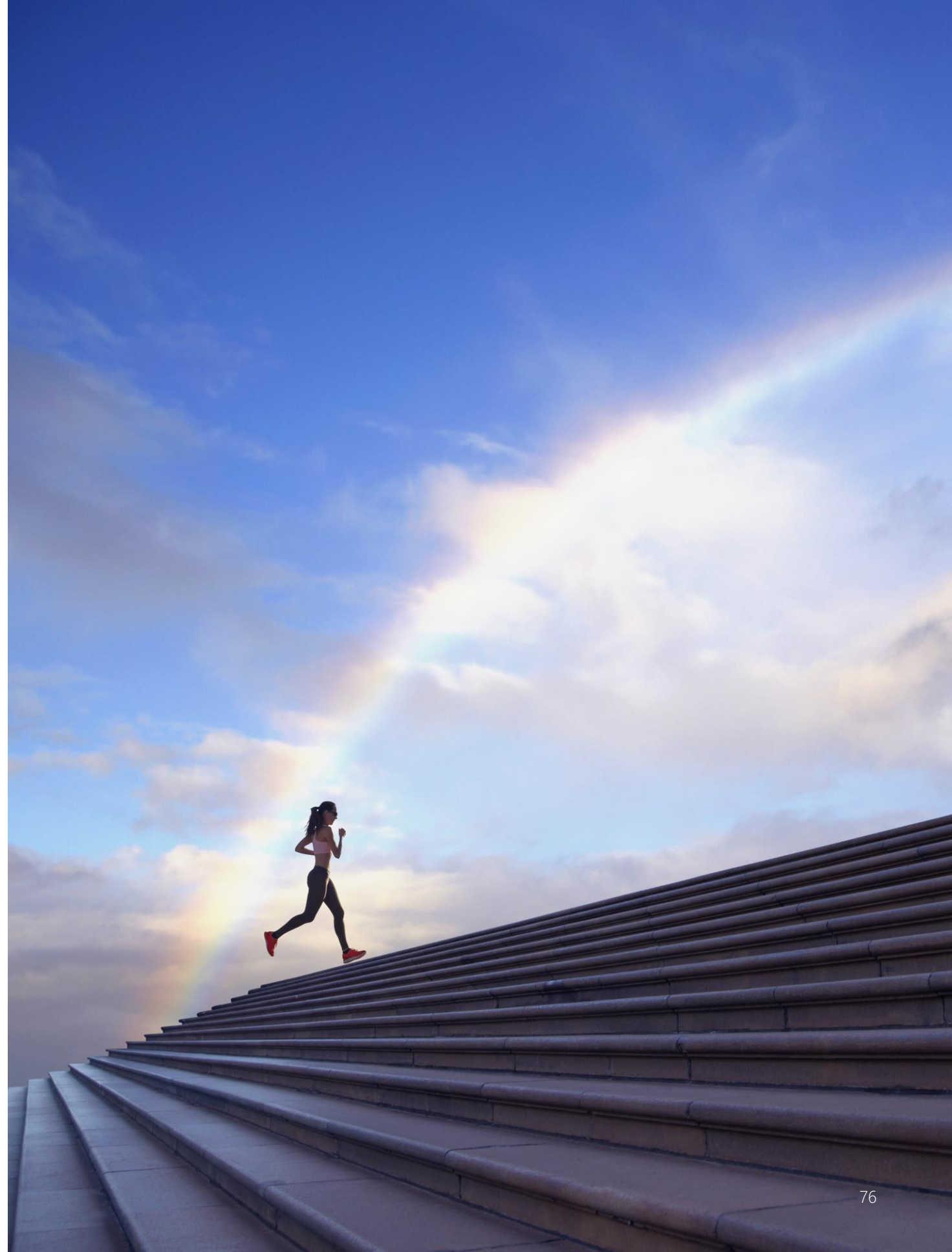
In recent years, the development of China's producer services industry has been highly valued by governments at all levels and supported by national industrial policies. The state has issued a number of policies to encourage the development and innovation of producer services, providing a clear and broad market prospect for the development of producer services, and providing a good production and operation environment for enterprises. China's producer service industry has accelerated its specialization and promoted industrial transformation and upgrading. With the deepening of supply-side structural reform and the rapid development of information technology, the modern service industry has accelerated its rise, becoming an important force to stimulate national economic growth, promote the transformation of production and lifestyle, promote industrial transformation and upgrading, and coordinate development.

重庆作为第二批服务业扩大开放试点城市，自2021年试点以来服务业发展取得了阶段性成果。同时，重庆市生产性服务业正迅速发展，逐步成为支撑当地经济增长的重要引擎，将为智能网联新能源汽车等各类重要产业的发展提供有效助力。

As the second batch of pilot cities for expanding the opening up of the service industry, Chongqing has achieved phased results in the development of the service industry since the pilot project in 2021. At the same time, the Producer Service Industry in Chongqing is developing rapidly, gradually becoming an important engine to support local economic growth, which will provide effective help for the development of various important industries such as intelligent network-connected NEV.

我们选取重庆市智能网联新能源汽车产业作为研究样本，对相关配套生产性服务业情况进行分析，深入研究各产业状况及区域特点。经调研发现，重庆市智能网联新能源汽车产业企业数量众多，配套齐全，且区域分布广泛，汽车产业布局实现均衡发展。与此同时，重庆市新能源汽车产业部分行业仍存在创新研发程度不足、人才短缺与人力资源供应不足等问题。通过对智能网联新能源汽车行业的分析，可以看出重庆市生产性服务业整体情况良好，具备良好的发展态势。在未来，随着区域协同效应的深化以及配套政策的扶持，重庆市生产性服务业必将迎来长足的发展，安永基于调研结果为重庆市提供针对性建议，希望能够为重庆市生产性服务业的发展建言献策，提供有效助力。

We selected Chongqing Intelligent Network Interconnection NEV Industry as a research sample, analyzed the situation of related supporting producer services, and deeply studied the status and regional characteristics of each industry. After investigation, it is found that there are many intelligent network-connected NEV industry enterprises in Chongqing, with complete supporting facilities, wide regional distribution and balanced development of automobile industry layout. At the same time, some industries in Chongqing's NEV industry still have problems such as insufficient innovation and R&D, shortage of talents and insufficient supply of human resources. Through the analysis of the Intelligent Connected NEV industry, we can see that the producer service industry in Chongqing is in good condition and has a good development trend. In the future, with the deepening of regional synergy and the support of supporting policies, Chongqing's producer service industry will certainly usher in considerable development. Based on the survey results, EY provides targeted suggestions for Chongqing, hoping to provide suggestions and effective assistance for the development of Chongqing's producer service industry.



结束语

Ending



重庆市外商投资企业的蓬勃发展，是重庆经济社会发展的重要动力之一。近年来，随着中国改革开放的不断深化和重庆市政府优化营商环境的持续努力，越来越多的外商投资企业选择在重庆落户发展，为当地经济注入了新的活力。这些外商投资企业带来了先进的技术、管理经验和市场资源，促进了重庆市产业结构的升级和优化，推动了当地就业增长和经济持续增长。

The vigorous development of foreign-invested enterprises in Chongqing is one of the important driving forces for Chongqing's economic and social development. In recent years, with the deepening of China's reform and opening up and the continuous efforts of the Chongqing Municipal Government to optimize the business environment, more and more foreign-invested enterprises have chosen to settle in Chongqing for development, which has injected new vitality into the local economy. These foreign-invested enterprises have brought advanced technology, management experience and market resources, promoted the upgrading and optimization of Chongqing's industrial structure, and promoted local employment growth and sustained economic growth.

未来，重庆市外商投资企业的发展前景仍然十分广阔。首先，重庆市政府将继续加大对外商投资企业的支持力度，进一步优化营商环境，提供更加便利和优惠的政策措施，吸引更多外商投资企业来重庆投资兴业。其次，随着中国经济的不断发展和全球化进程的加速推进，重庆市外商投资企业将有更多机会参与到国际合作中，拓展海外市场，实现更大发展。

In the future, the development prospects of foreign-invested enterprises in Chongqing are still very broad. First of all, the Chongqing Municipal Government will continue to increase support for foreign-invested enterprises, further optimize the business environment, provide more convenient and preferential policies and measures, and attract more foreign-invested enterprises to invest and develop in Chongqing. Secondly, with the continuous development of China's economy and the acceleration of globalization process, foreign-invested enterprises in Chongqing will have more opportunities to participate in international cooperation, expand overseas markets and achieve greater development.

重庆市外商投资企业协会连续七年组织编写和发布《重庆市外商投资环境测评报告》，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。

Chongqing Association of Enterprises with Foreign Investment has organized the preparation and issuance of "Chongqing Foreign Investment Environment Assessment Report" for seven consecutive years, aiming at closely tracking the opinions and suggestions of foreign investment enterprises, deeply analyzing the changes in Chongqing's foreign investment environment in recent years, comprehensively and objectively reflecting the achievements and existing problems of business environment construction, and helping to optimize Chongqing's business environment.

我们相信，重庆市外商投资企业在未来的发展中将继续发挥重要作用，为重庆市经济社会发展作出更大贡献。希望各外商投资企业能够抓住机遇，勇于创新，不断提升自身核心竞争力，与重庆市共同发展，共同实现更加美好的明天。让我们携手并进，共同开创重庆市外商投资企业的辉煌未来！

We believe that foreign-invested enterprises in Chongqing will continue to play an important role in the future development and make greater contributions to the economic and social development of Chongqing. It is hoped that all foreign-invested enterprises can seize the opportunity, dare to innovate, constantly enhance their core competitiveness, and jointly develop with Chongqing to achieve a better tomorrow. Let us work hand in hand to create a brilliant future for foreign-invested enterprises in Chongqing!

