

2023 China Business Climate Survey Report
2023年度中国商务环境调查报告

**Technology/Telecommunication-
Hardware Industry Report**
科技/电信-硬件行业报告

This report distills industry-specific data from the full 2023 BCS Report reflects specific industry's business climate. We hope this report is helpful for our members to measure their operations and compare business outlooks and strategies with their industry and the broader foreign business community.

We want to thank all our members who took the time to participate in the survey. Your input is greatly valued and the key to our joint success.

**All data in this report was rounded to the nearest whole number. Therefore, some charts or graphs may not equal 100 percent.*

***Some response options and categories in the BCS have changed over time to address current market realities.*

- Executive Summary
- Financial Performance
- Investment Plan
- Two-Year Business Outlook
- Top three business challenges and opportunities

Technology/Telecommunication-Hardware Sector Executive Summary

- In 2022, 53% of the sector members reported a profitable financial performance, 9pp higher than the overall respondents. Over half of them (53%) estimated the revenue would not be up, 15pp lower than the overall respondents.
- Less than one-in-five (18%) of the sector members said the quality of China's investment environment is improving, and around 41% of them ranked China as their near-term first or top three investment destinations.
- 88% of the sector members show pessimistic views on US-China relations, and another 53% reported negative views about competitive pressures.
- 71% of the sector members said that concerns about data security is one of their top business challenges in China.
- Adoption of digital technologies (e.g., artificial intelligence, cloud solutions, 5G, IoT) (65%) and China's New Infrastructure Initiative (35%) are among the top three business opportunities.

本报告从2023年度BCS报告全文中摘取了科技/电信-硬件行业的数据，以反映具体的行业商务环境情况。我们希望本报告能成为会员公司在其具体行业乃至更广泛的外资企业中，衡量业务、比较商业前景与策略的实用工具。

中国美国商会向所有参与此次调查问卷的会员机构致以诚挚的谢意。您的贡献是我们共同成功的关键。

*本报告中的所有数据由于四舍五入至最接近的整数分图表或图像的数据总和可能不等于总额（100%）
**商务环境调查中的部分回答选项和类别会因反映当前市场情况而有所改变

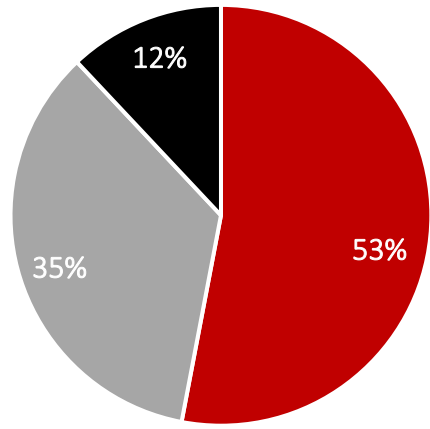
- 摘要
- 营收状况
- 在华投资计划
- 今后两年中国业务展望
- 在华运营前三大挑战和机遇

科技/电信-硬件行业概述

- 2022年，53%的科技/电信-硬件行业会员企业报告实现盈利，较整体受访会员企业结果高出9个百分点。超过半数(53%)该行业会员企业预计其2022年营收将不会增长，较整体受访会员企业结果低15个百分点。
- 仅有不到五分之一(18%)的该行业会员企业认为中国的投资环境质量有所改善。大约有41%的该行业会员企业将中国列为近期内首要或前三大投资目的地。
- 88%的该行业会员企业对中美关系持有悲观态度，另有53%的该行业会员企业对在华业务竞争压力感到悲观。
- 71%的该行业会员企业表示“对数据安全性的顾虑”是其在华业务首要挑战之一。
- “数字技术（包括人工智能、云计算和5G、物联网IoT）”（65%）和“中国新基建计划”（35%）为该行业会员企业的前三大在华业务机遇。

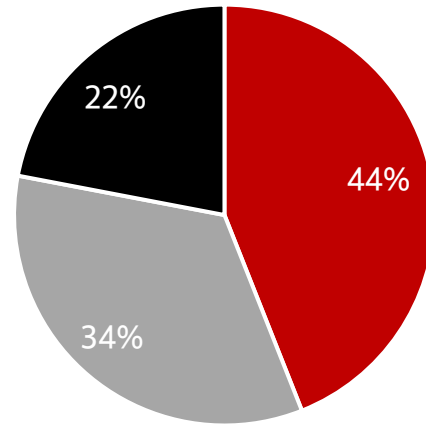
Financial Performance

Technology/Telecommunication-Hardware Sector



■ Profitable ■ Break even ■ Loss

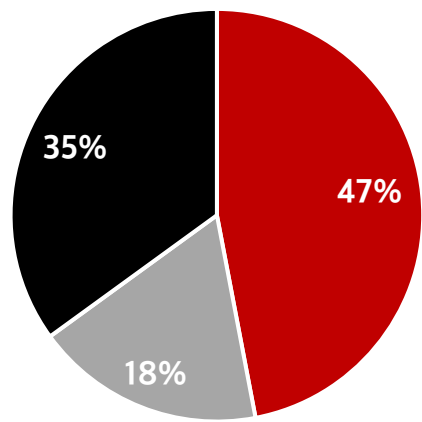
All respondents



■ Profitable ■ Break even ■ Loss

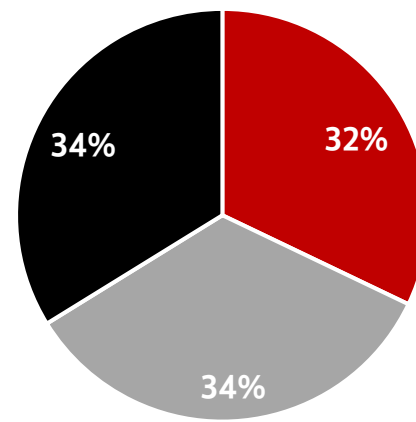
Estimated Revenue

Technology/Telecommunication-Hardware Sector



■ Up ■ Comparable (± < 2%) ■ Down

All respondents



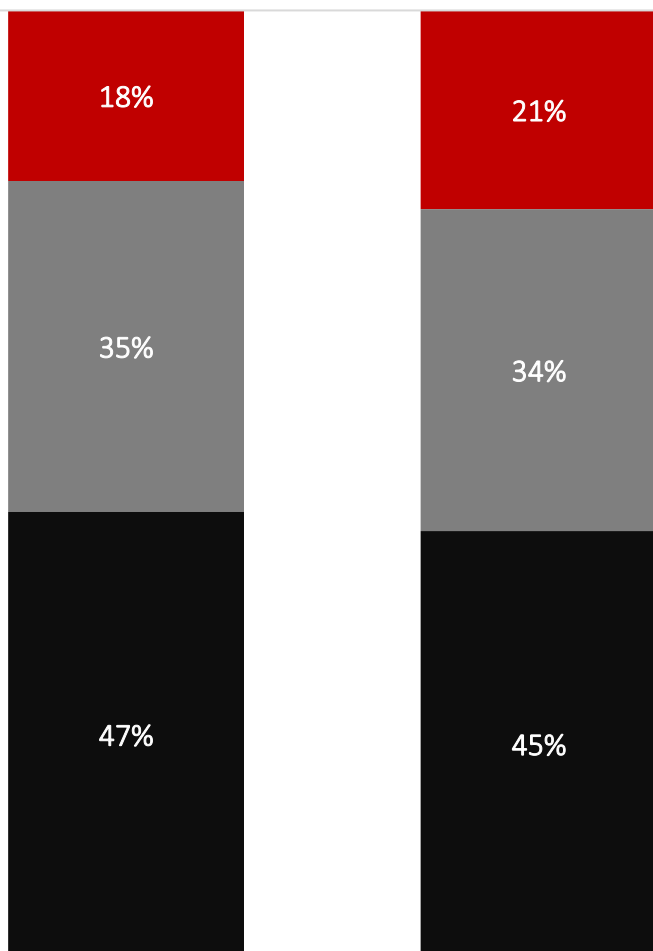
■ Up ■ Comparable (± < 2%) ■ Down

Investment Plan

China Investment environment quality

Technology/Telecommunication-Hardware

All

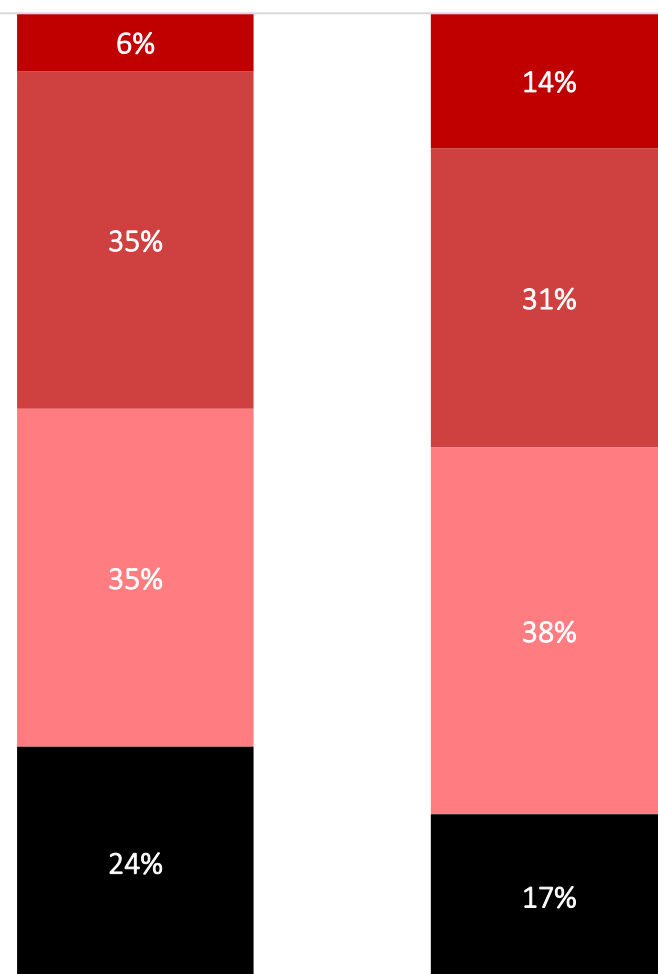


■ Improving ■ Staying the same ■ Deteriorating

China ranks of near-term global investment destination

Technology/Telecommunication-Hardware

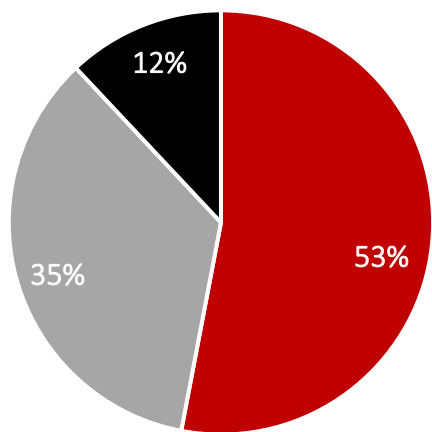
All



■ First priority ■ Top three priority
 ■ One among many destinations ■ Not a high priority

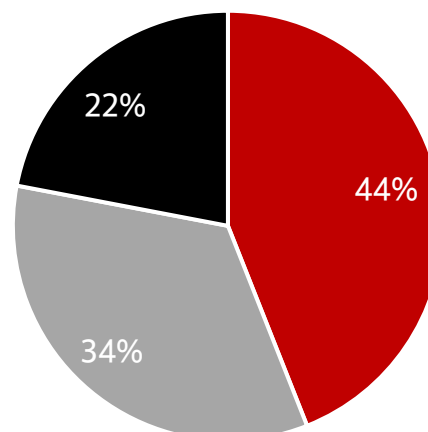
财务状况

科技/电信-硬件行业



■ 盈利 ■ 基本持平 ■ 亏损

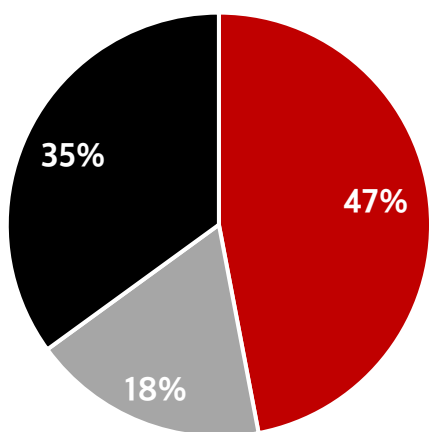
所有受访会员企业



■ 盈利 ■ 基本持平 ■ 亏损

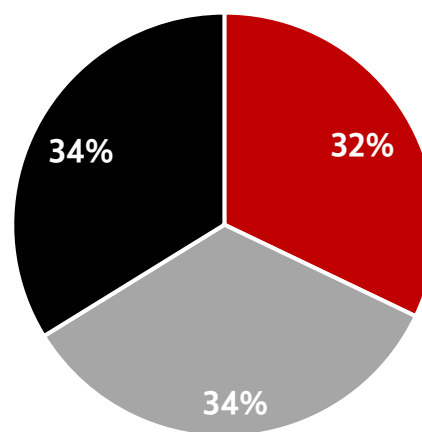
预计年度经营收入

科技/电信-硬件行业



■ 上升 ■ 持平(± < 2%) ■ 下降

所有受访会员企业



■ 上升 ■ 持平(± < 2%) ■ 下降

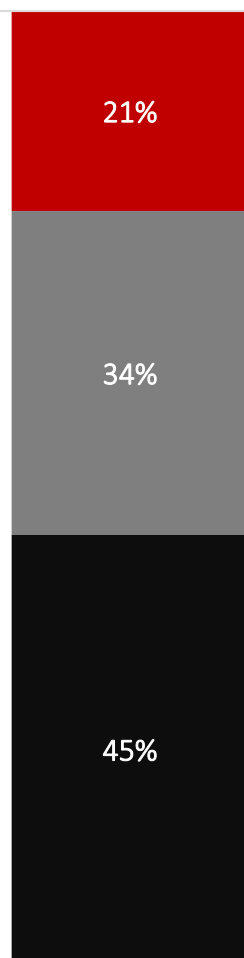
在华投资计划

中国投资环境质量

科技/电信-硬件行业



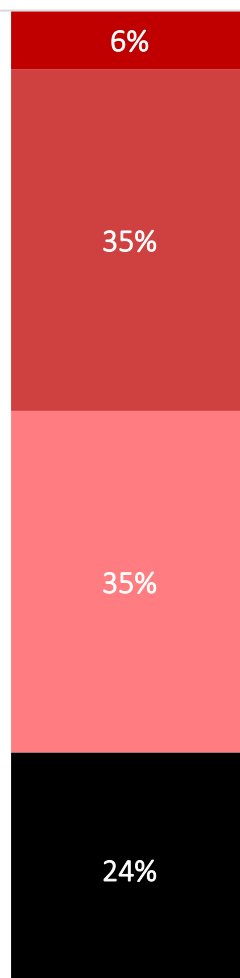
所有受访会员企业



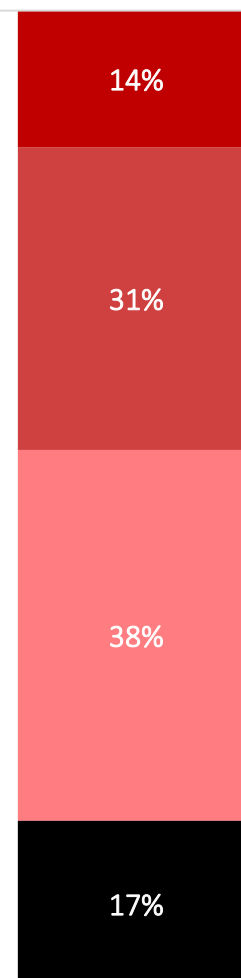
■ 有所改善 ■ 维持不变 ■ 有所恶化

中国作为公司近期全球投资目的地的排名

科技/电信-硬件行业

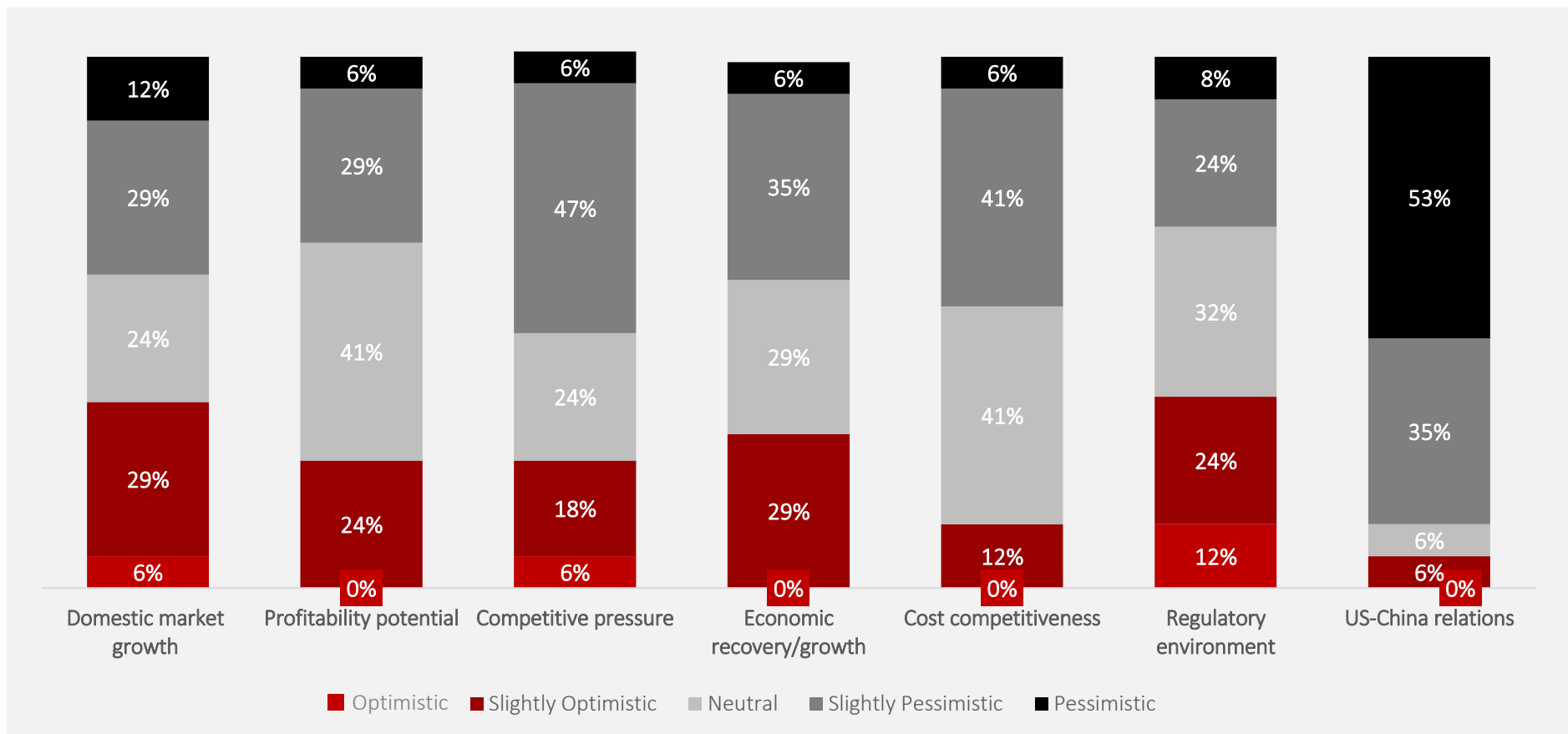


所有受访会员企业



■ 首要投资目的地 ■ 前三大投资目的地
■ 众多投资目的地 ■ 不是优先考虑对象

Two-Year Business Outlook in China



Top three business challenges

Technology/Telecommunications – Hardware Sector	All Respondents
Rising tensions in US-China relations 82%	Rising tension in US-China relations 66%
Concerns about data security 71%	COVID-19 prevention measures 55%
COVID-19 prevention measures 59%	Inconsistent regulatory interpretation and unclear laws & enforcement 32%

Top three business opportunities

Technology/Telecommunications – Hardware Sector	All Participants
Adoption of digital technologies (e.g., artificial intelligence, cloud solutions, 5G, IoT) 65%	Growth in domestic consumption/Rising of an increasingly sizable and affluent middle class 45%
China's New Infrastructure Initiative 35%	Ongoing economic and market reform 36%
Ongoing economic and market reforms 35%	Preferential FDI policies 23%

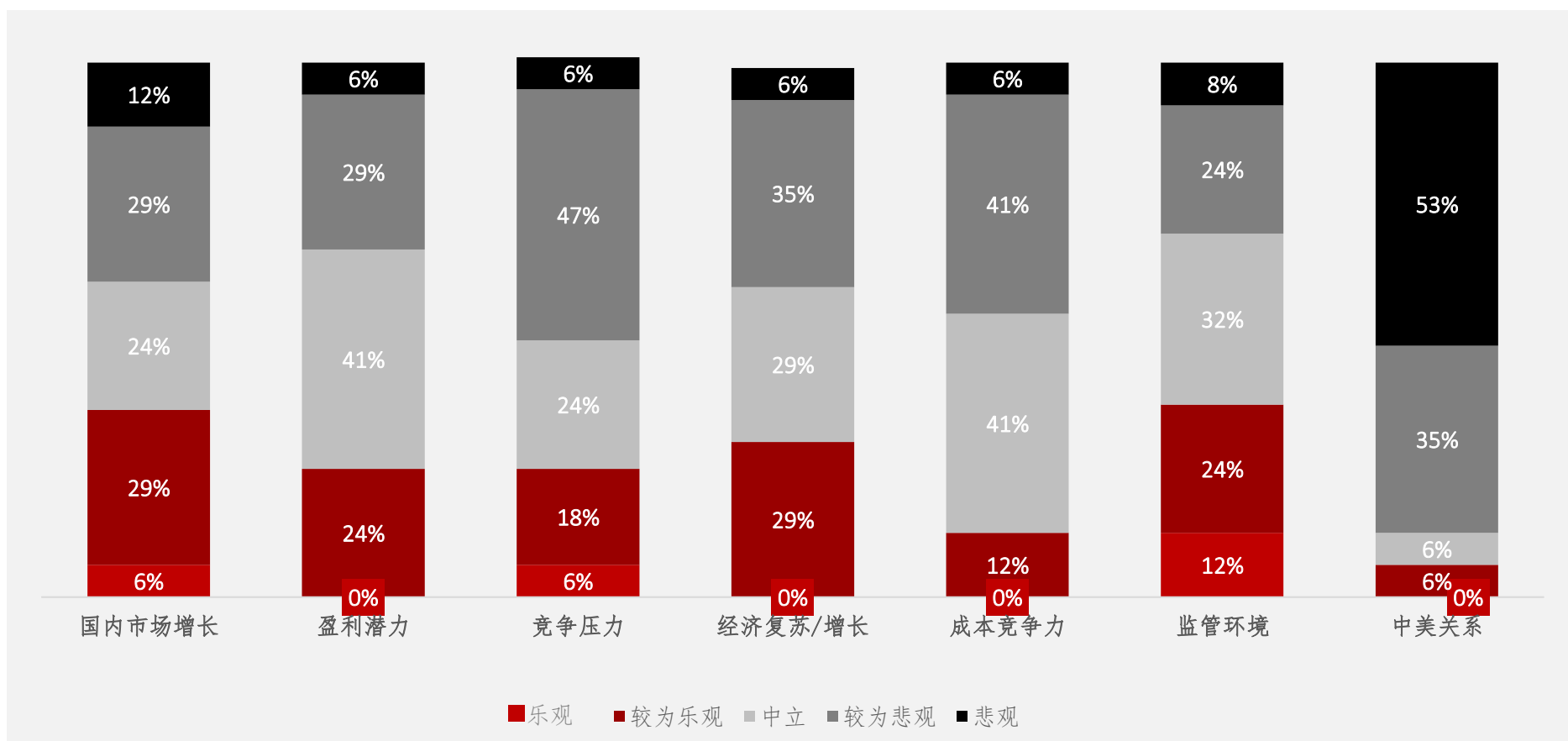


About AmCham China Business Climate Survey Report

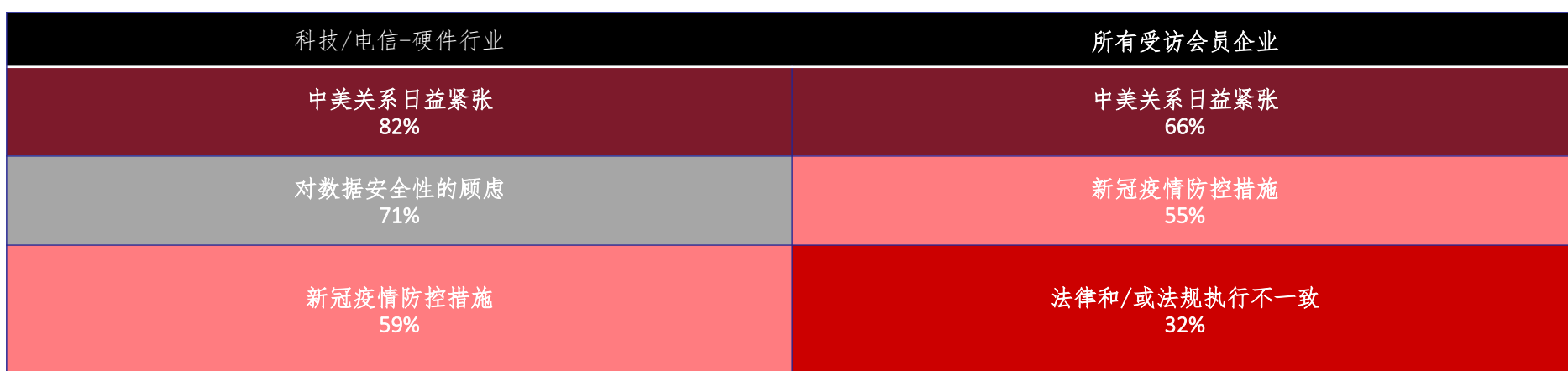
The China Business Climate Survey (BCS) is one of AmCham China’s most important advocacy tools. It provides valuable insights to the Chinese and US governments about member companies’ concerns concerning China’s regulatory and policy environment and the daily business challenges they face operating in China. Furthermore, the survey provides a valuable tool for our members to measure their operations and compare business outlooks and strategies with the broader community.

Visit [here](#) for more information on the report

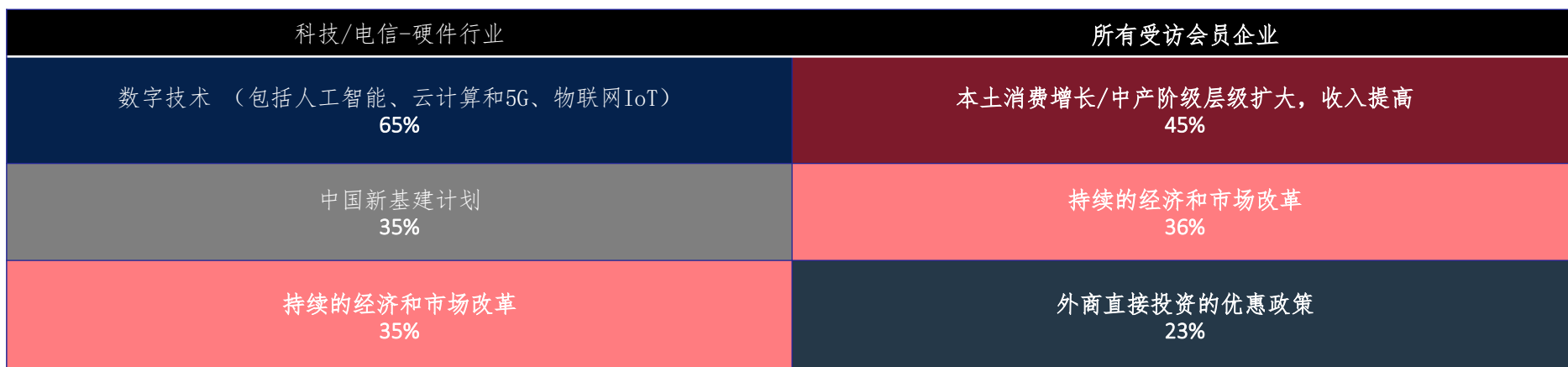
今后两年中国业务展望



前三大在华运营挑战



前三大在华运营机遇



关于中国商务环境调查报告

中国商务环境调查报告(BCS)是中国美国商会最重要的政策谏言工具之一。该报告结果反映了商会会员企业对中国监管和政策环境以及在华日常运营的真实情况,为中美两国政府提供了宝贵而深入的见解。此外,报告结果也为商会会员企业以及在华外资企业在华运营、投资决策等方面提供了衡量依据。

更多详情,请点击[这里](#)。