



Enquête sur les entreprises en Chine - Printemps 2022

*Du 1^{er} avril au 9 mai
200 répondants*

Climat des affaires et point sur les ressources humaines dans le contexte de crise actuel



Les mesures sanitaires et la situation en Ukraine pèsent sur l'activité des entreprises françaises en Chine

Avec plus de 2 100 filiales employant près de 445 000 personnes, la France est le premier investisseur européen en Chine en termes de nombre d'entreprises. Forte de 1600 adhérents, la Chambre de Commerce et d'Industrie Française en Chine (CCI FRANCE CHINE) défend les intérêts de ces entreprises depuis 1992.

Dans la continuité des sondages publiés par différentes chambres de commerce étrangères (dont l'Union européenne, l'Allemagne, et les Etats-Unis) la Chambre de Commerce et d'Industrie Française en Chine (CCI FRANCE CHINE) a interrogé ses membres entre le 1^{er} avril et le 9 mai sur l'activité économique des entreprises françaises. 200 entreprises ont répondu au sondage.

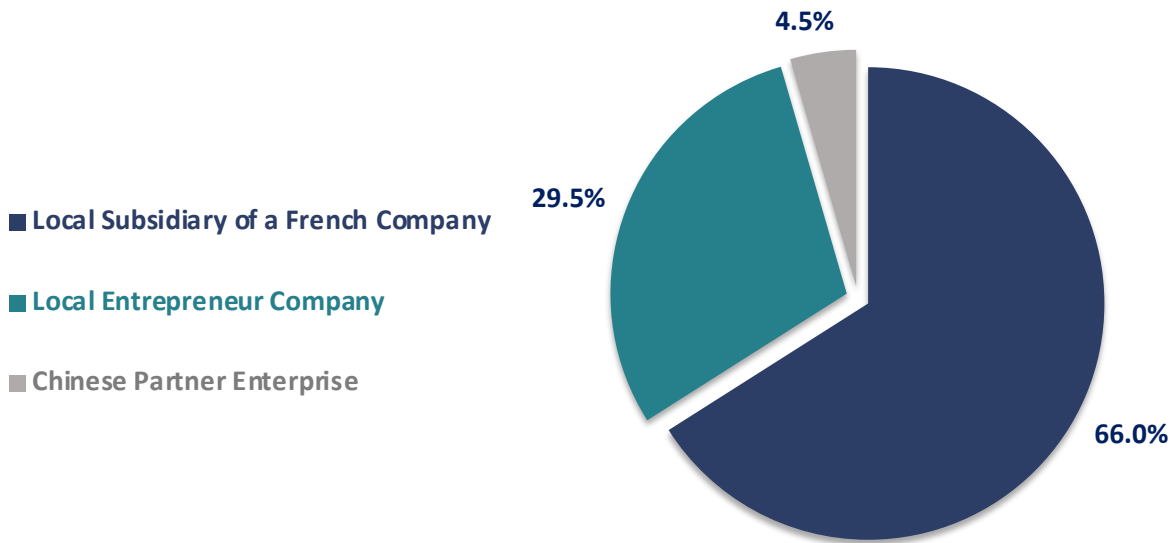
- **Les mesures sanitaires, qui ont conduit ces dernières semaines à des confinements partiels ou généralisés dans de nombreuses villes représentant près de 40 % du PIB chinois, ont des conséquences sur la stratégie d'investissement de la plupart des filiales d'entreprises françaises en Chine (80 %) ;** 16 % envisagent une réduction de leur présence dans le pays. L'image de la Chine se dégrade aux yeux de leurs sièges (76 %), notamment pour y investir (64 %) et conduire des activités de R&D (36 %). Les mesures sanitaires actuelles ont des conséquences particulièrement négatives pour la gestion RH des employés internationaux (85 %). La moitié des entreprises remplace des expatriés par des employés locaux et les motifs avancés, pour les deux tiers, sont les restrictions d'entrée en Chine et la perte d'attractivité du territoire pour les expatriés. Ce choix, s'il est contraint, risque de dégrader la communication avec le siège en France (68 %).
- **80 % des filiales sont affectées par la tendance de découplage entre la Chine et le reste du monde,** qui peut peser sur des aspects tels que les chaînes de valeur (48 %), la gestion de données personnelles (43 %) ou la conformité juridique (40 %). Plus de la moitié des entreprises affectées par la tendance au « découplage » envisagent en conséquence de régionaliser leurs activités, c'est-à-dire être présent en Chine pour le marché chinois seulement.
- **Le régime de propriété intellectuelle (56 %), et le cadre réglementaire (51 %) figurent parmi les principaux obstacles auxquels sont confrontées les entreprises françaises sur le marché chinois.**
- Toutefois, **la Chine reste un pays propice à l'innovation** aux yeux des filiales (86 %) et de leur siège (72 %) ; 54 % des entreprises investissent dans la R&D en Chine. Le fort potentiel du marché chinois n'est donc pas ignoré par les entreprises françaises ; 37 % des filiales envisagent encore d'étendre leurs investissements.
- **Les entreprises membres sont également affectées par les conséquences de l'invasion de l'Ukraine (37 %),** notamment par le biais de la perturbation des chaînes de valeur (55 %), d'une baisse de chiffres d'affaires (32 %), et d'une hausse des prix de l'énergie (30 %).

Les difficultés rencontrées par les entreprises françaises en Chine sont réelles et l'attractivité du pays risque une dégradation durable si les mesures sanitaires actuelles sont maintenues. Plus spécifiquement, il est grand temps de faciliter l'arrivée des expatriés sur le territoire chinois après plus de deux ans de fermeture stricte, par une augmentation des services aériens internationaux, la délivrance de visas, ainsi qu'une amélioration des conditions de quarantaine (hébergement, prévisibilité, séparation des familles). Il s'agit de facteurs essentiels pour l'approfondissement des coopérations industrielles et la croissance d'opportunités commerciales pour les entreprises françaises et chinoises. Pour que nos échanges commerciaux et nos investissements croisés continuent de s'accroître, un climat des affaires transparent, prévisible et équitable est nécessaire.

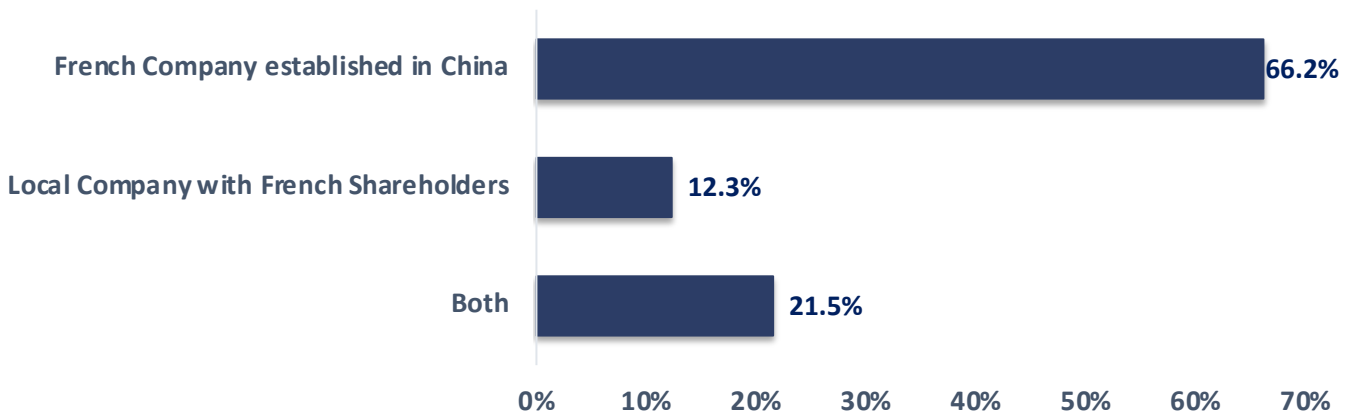


Profile of Respondents

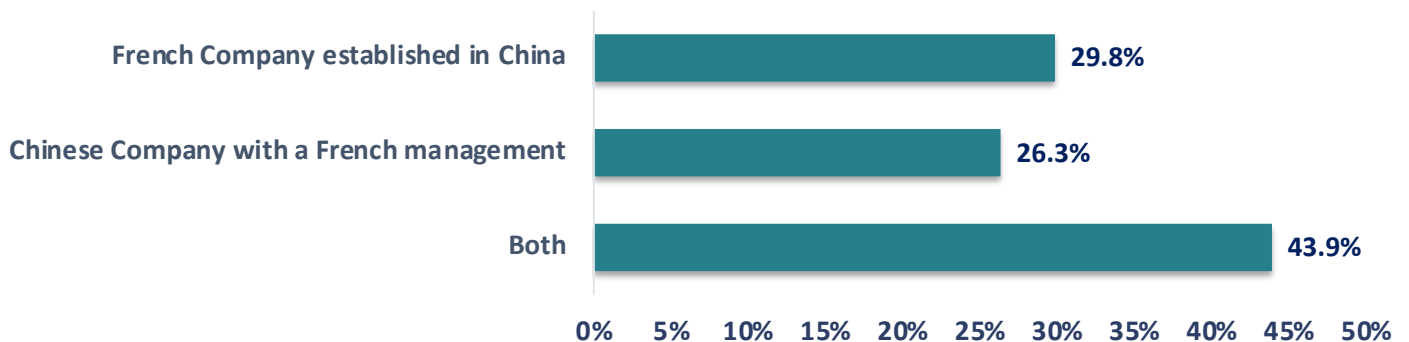
Company category



The local subsidiaries of a French company in China who completed the survey regard themselves as:



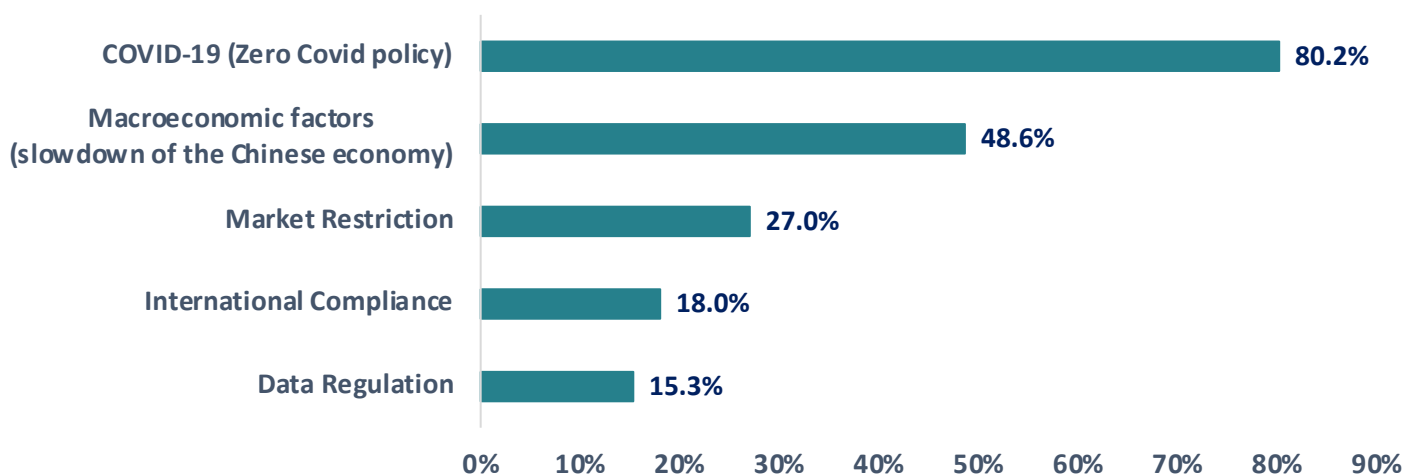
The Local Entrepreneur Companies who completed the survey regard themselves as:



Perception of China and Impact on Investments

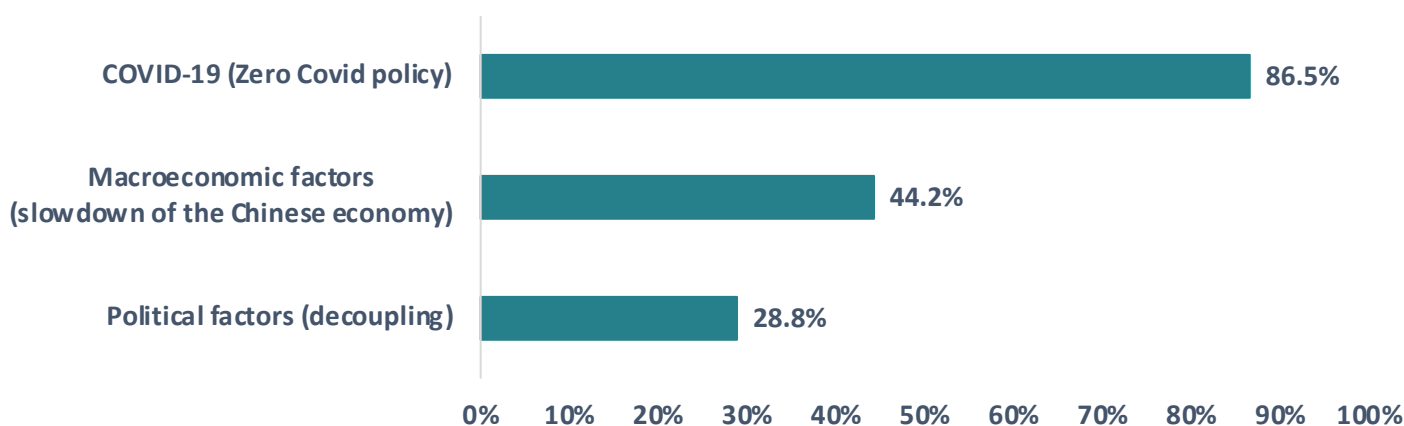
Subsidiary of a French company in China

Has your investment strategy been impacted by one or several of the following factors/ trends/ developments ?



Entrepreneur Local company

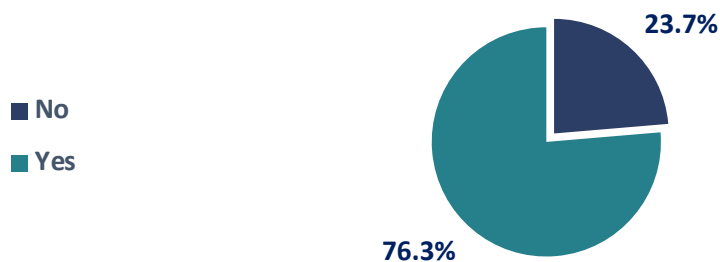
Has your investment strategy being impacted by one or several following reasons?



Perception of China and Impact on Investments

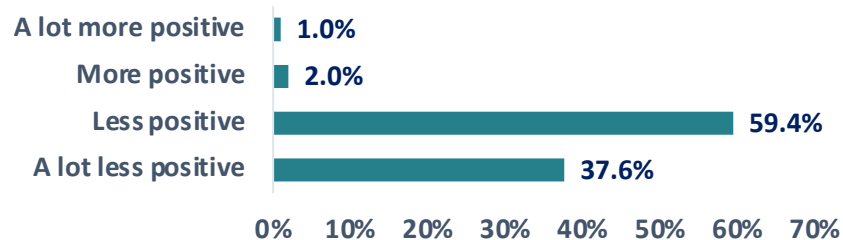
Subsidiary of a French company in China

Has there been a change of perception by your company's headquarter regarding China in the past months?

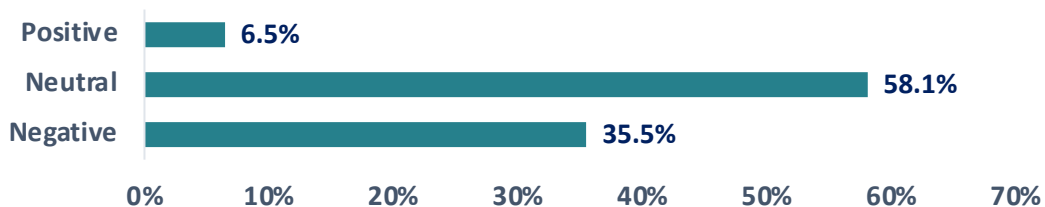


If your company headquarter had a change of perception toward China in these last few months...

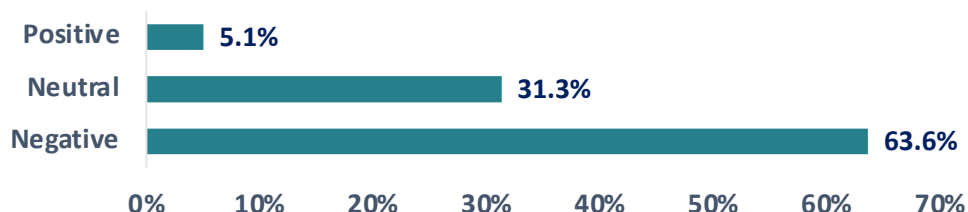
How did their perception evolve?



What was the impact of that change on R&D?



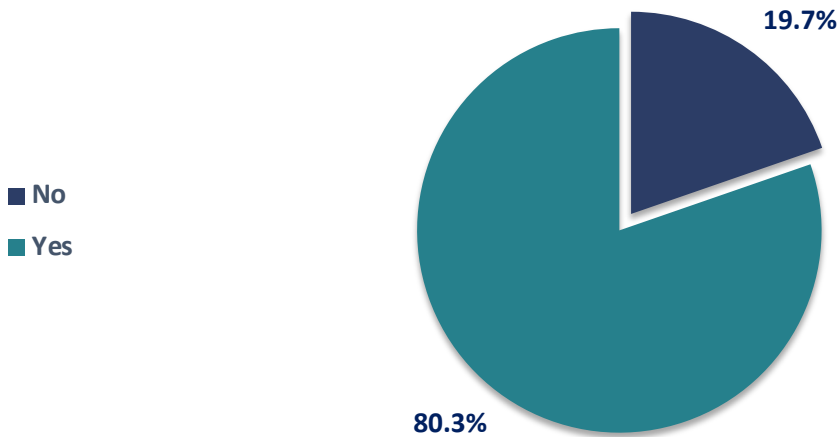
What was the impact on investment?



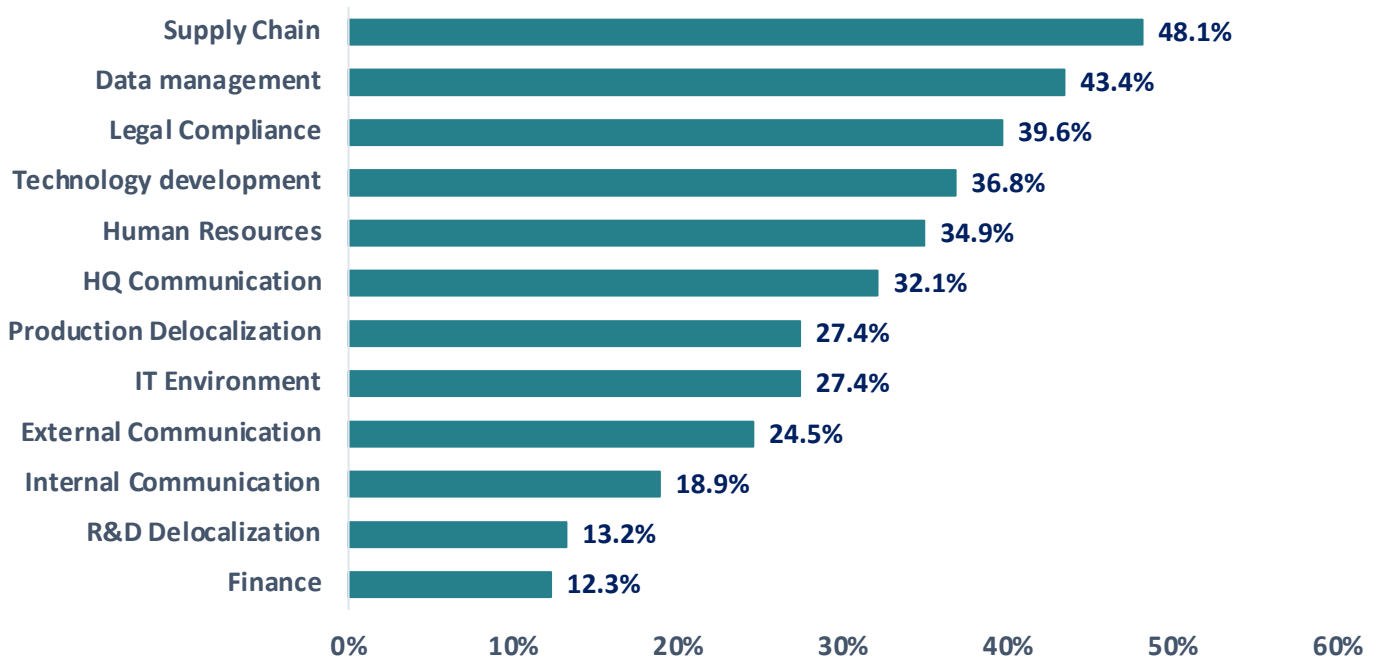
Decoupling and standards Challenges

Subsidiary of a French company in China

Do you observe an impact on your business from the trend of decoupling between China and the world?



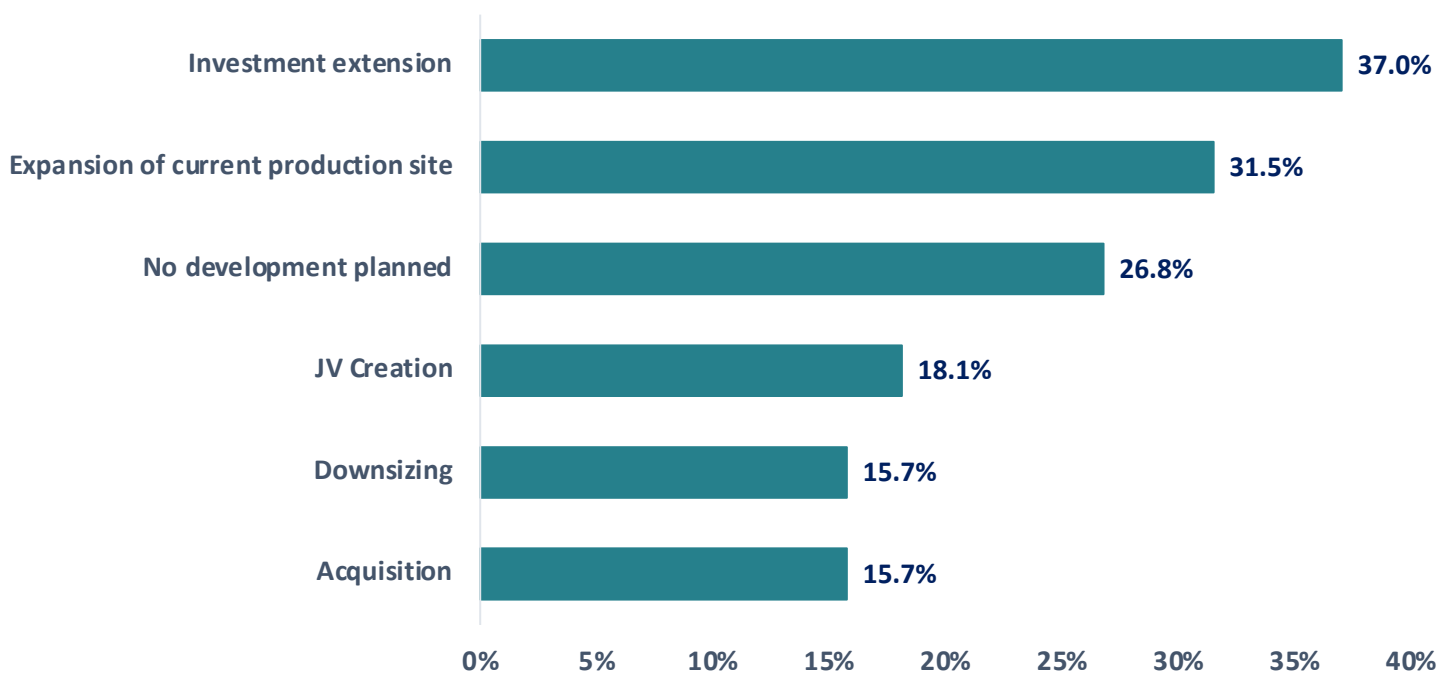
If yes, which aspects of your business are impacted?



Perception of China and Impact on Investments

Subsidiary of a French company in China

How do you plan to develop your activity in the next 3 years?



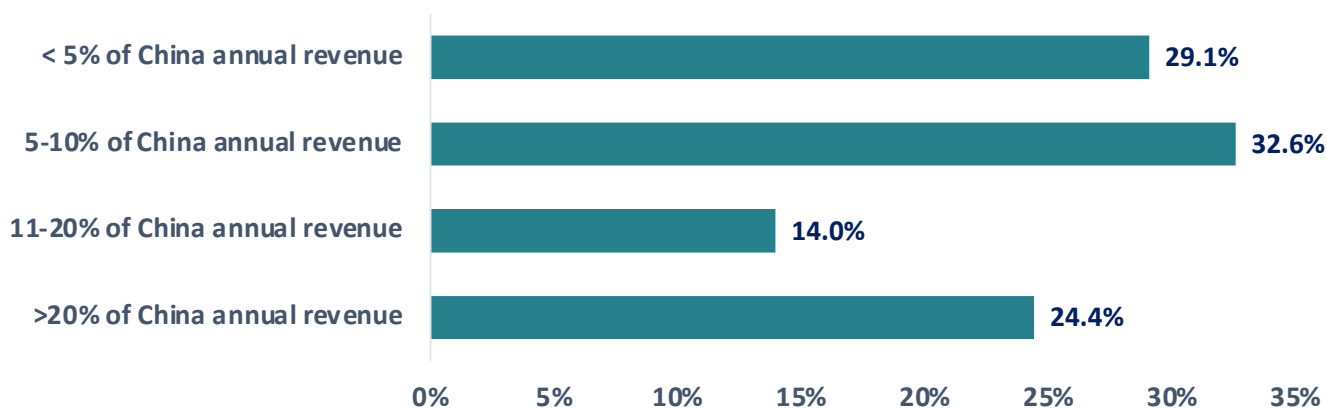
Reasons for no investment

- “Instability”
- “China is seen as a risk more than an opportunity”
- “Will be decided after the reopening of China’s borders”
- “Too many difficulties to enter / exit the country even for Chinese nationals, and fewer needs for our services as Chinese autonomy developed significantly”
- “No appetite for China investment from HQ”
- “Difficult to assess the market potential due to political instability / unclear political climate? “
- “Closing down China subsidiary and relocating production, notably in Portugal and Spain”
- “Recentering on EU business”

Perception of China and Impact on Investments

Subsidiary of a French company in China

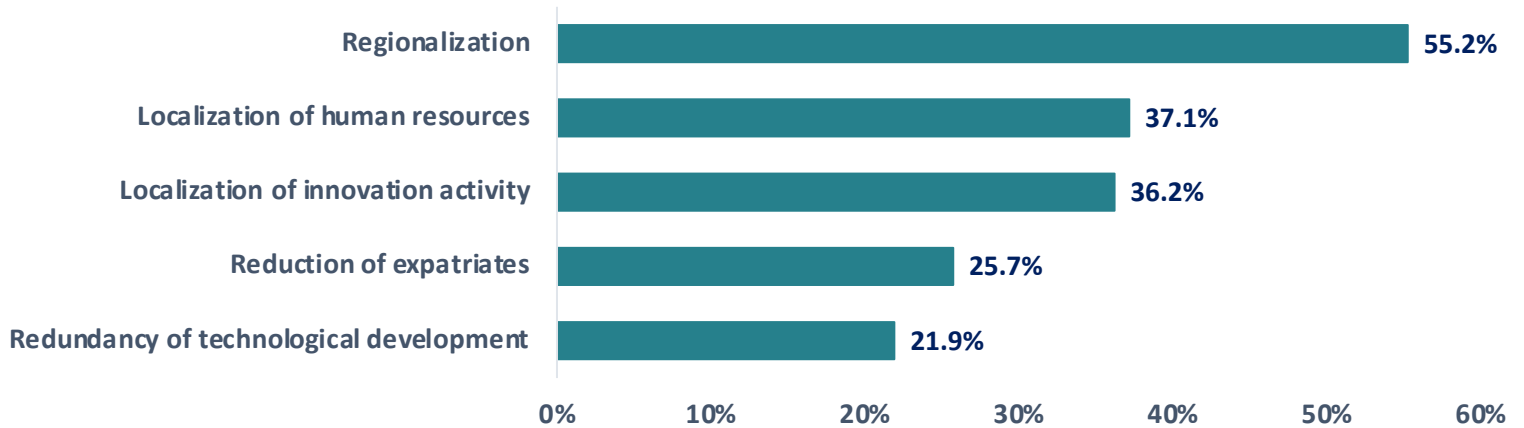
In case of investment/acquisition, estimation of the increase of the company's investments in China?



Decoupling and standards Challenges

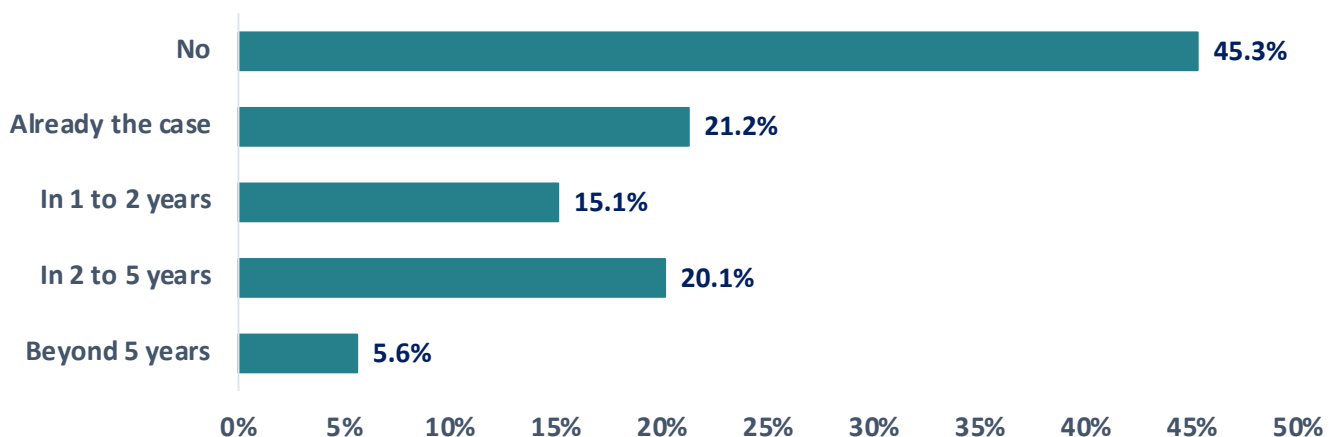
Subsidiary of a French company in China

If you perceive an impact of the decoupling between China and the world, through which means do you plan to adjust your strategy?



Subsidiary of a French company in China & Entrepreneur Local company

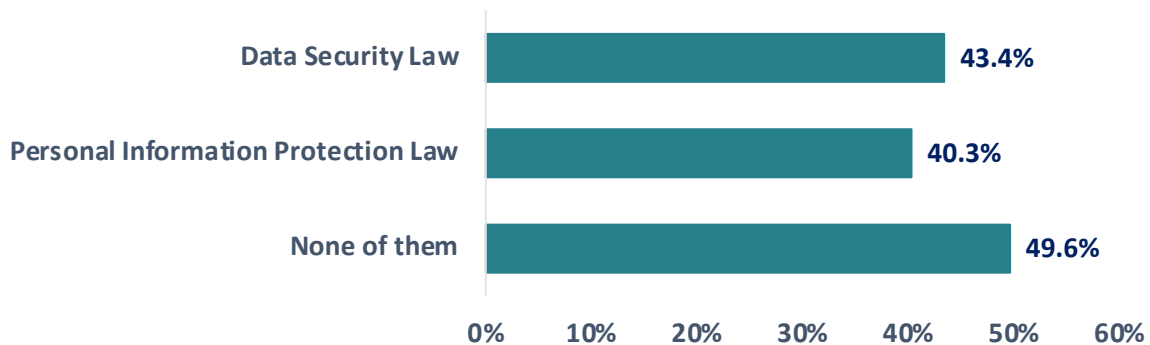
In your sector, do you anticipate a trend for the emergence of standards that would challenge your company's development



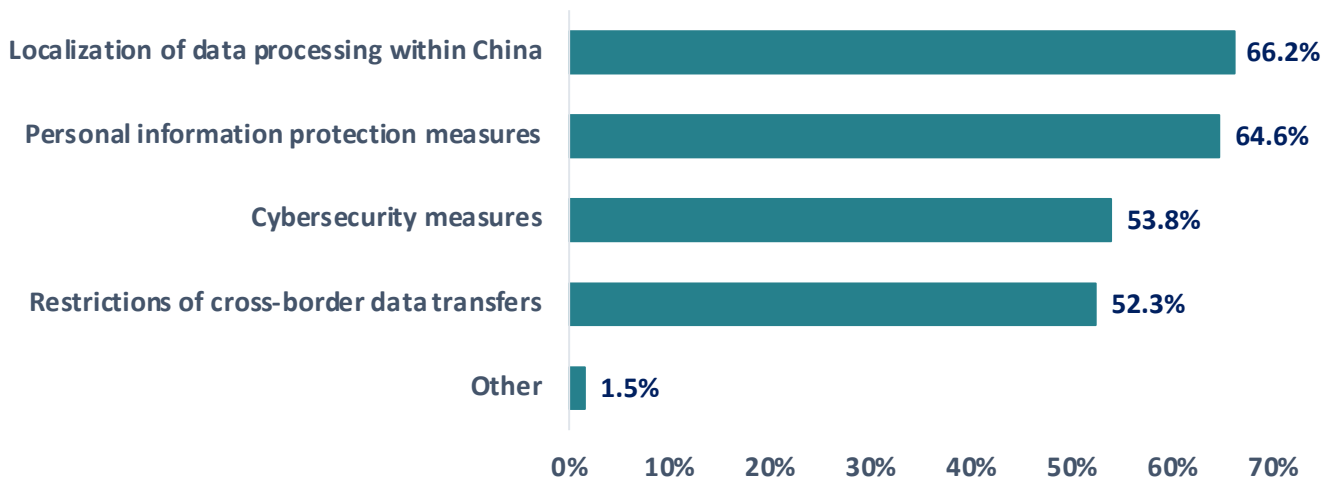
Decoupling and standards Challenges

Subsidiary of a French company in China

Has your company been affected by one of those two regulations?



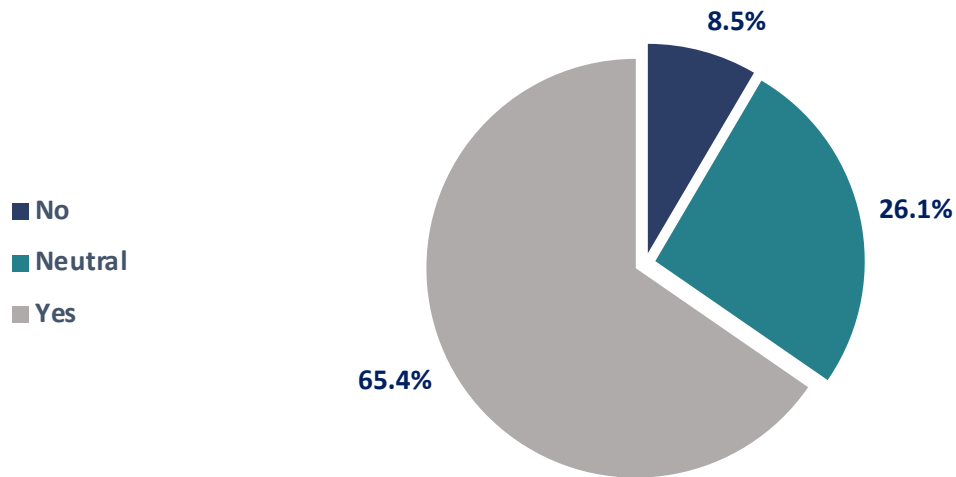
If yes, how were you affected?



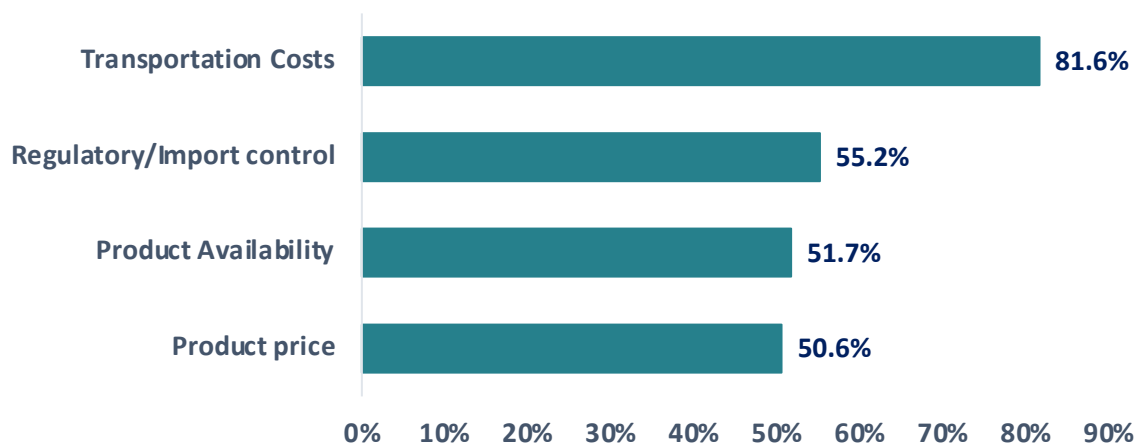
Supply Chain

Subsidiary of a French company in China

Has the supply of imported products/ material become harder?



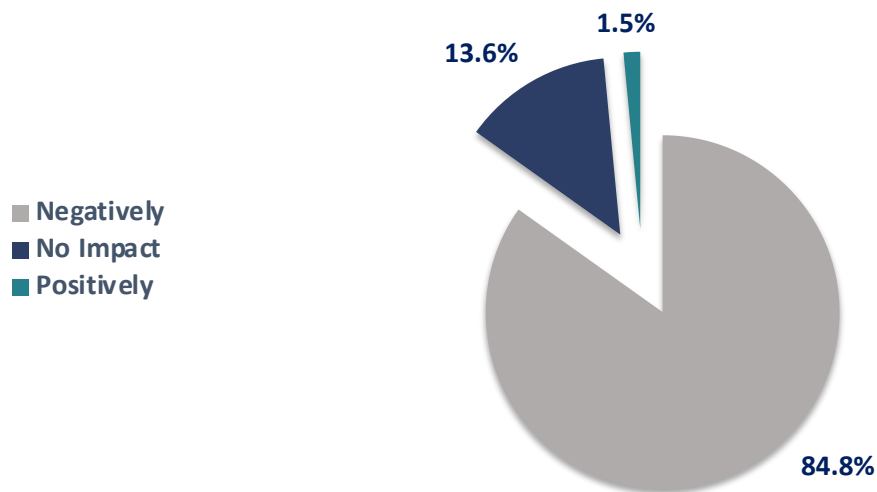
Reasons that make it harder for subsidiaries of French companies to import/source certain products/material



Zero Covid policy and foreign employees

Subsidiary of a French company in China

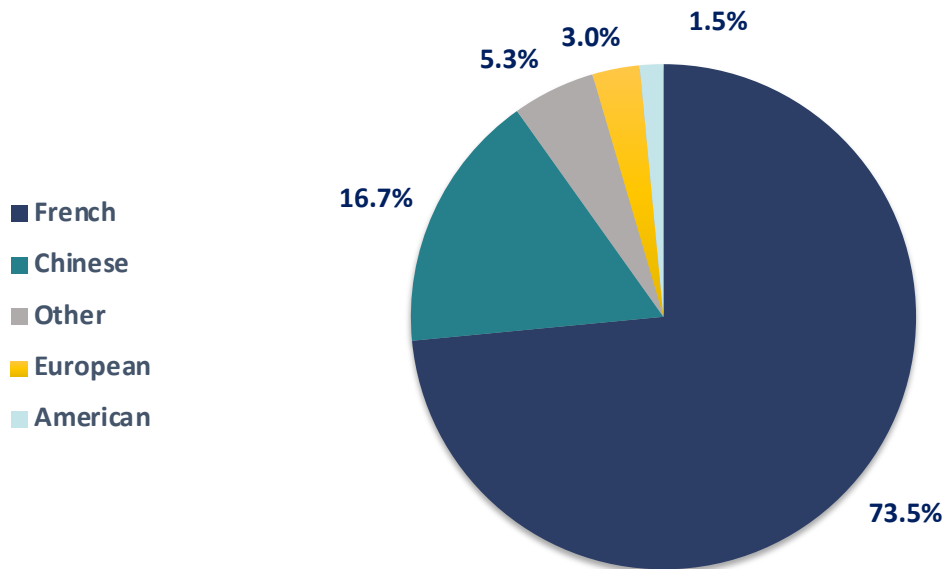
How is your company impacted by China's Zero Covid policy regarding/ with regards to foreign human resources/ foreign staff?



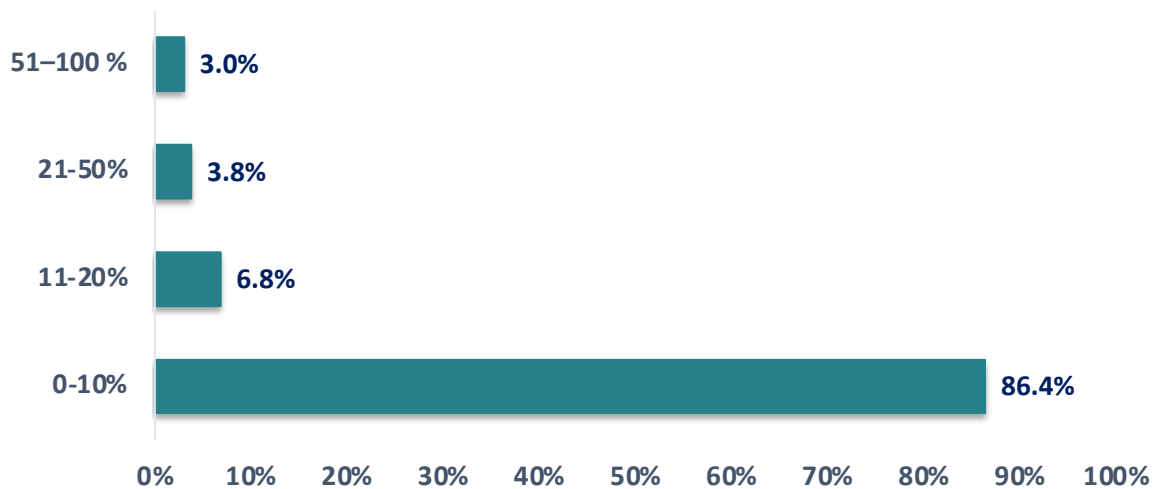
Status of foreign employees

Human resources trends for *Subsidiaries of French companies* in China

Nationality of the CEO in subsidiary of French companies in China



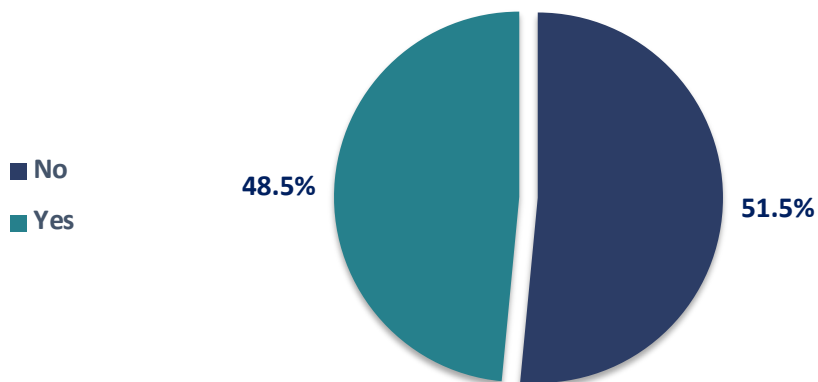
Ratio of expatriates in subsidiary of French companies in China



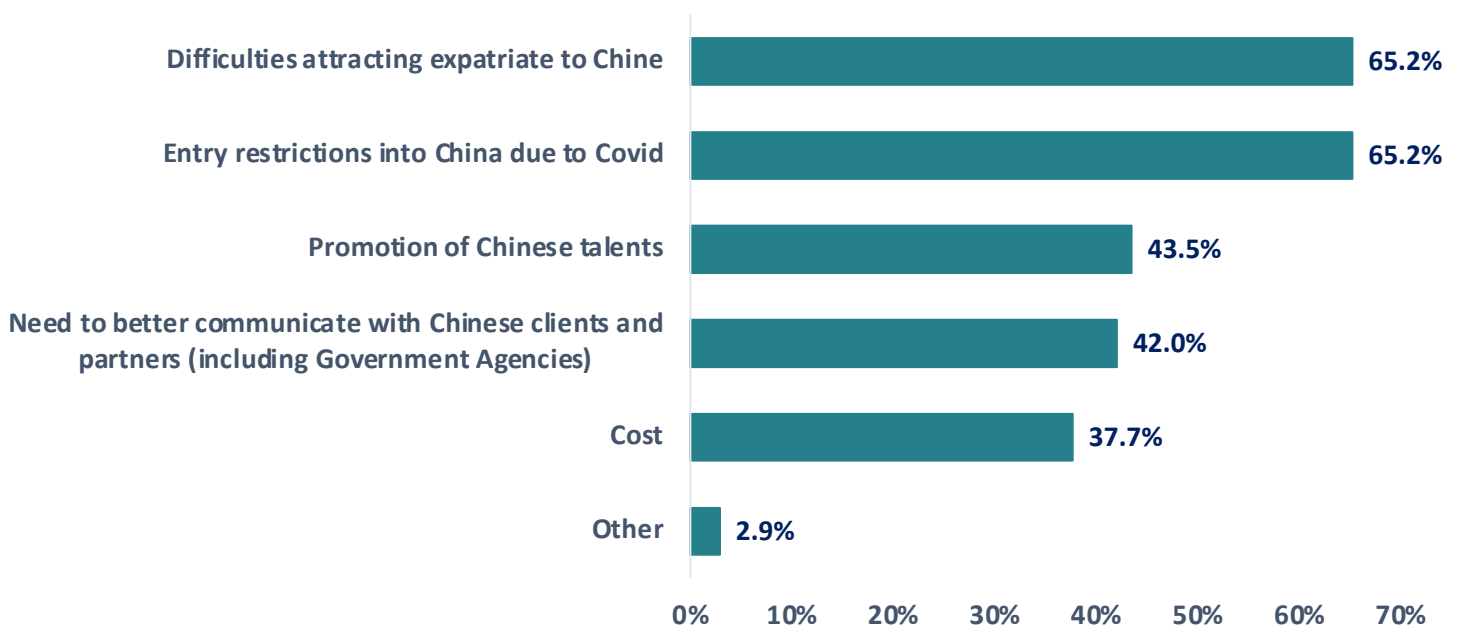
Reduction of foreign employees

Human resources trends for *Subsidiaries of French companies* in China

Is your company replacing expatriates by local talents ?



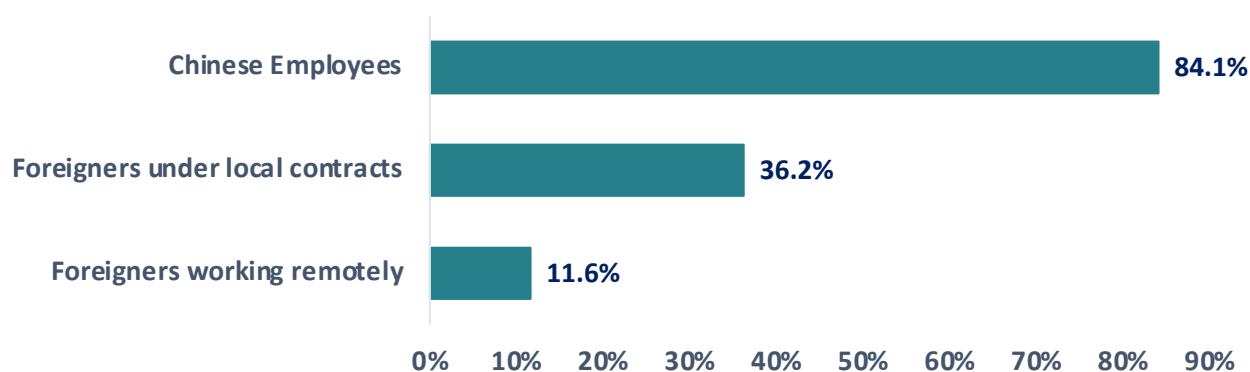
Those who answered “yes” listed the different reasons that led them to that decision



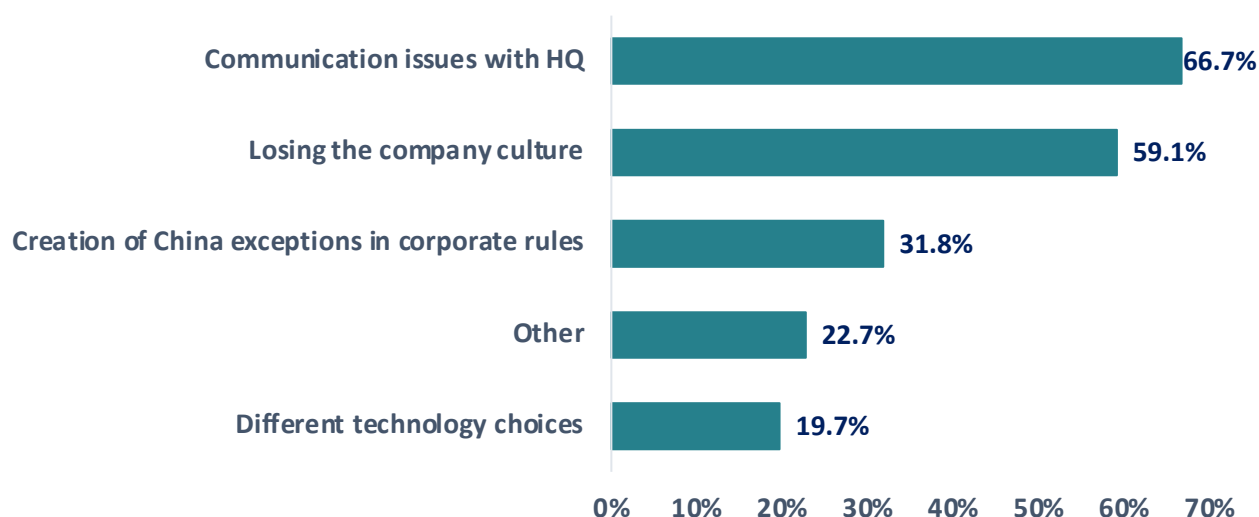
Reduction of foreign employees

Human resources trends for *Subsidiaries of French companies* in China

If your company is replacing their expatriates by local employees, by whom are they replaced?



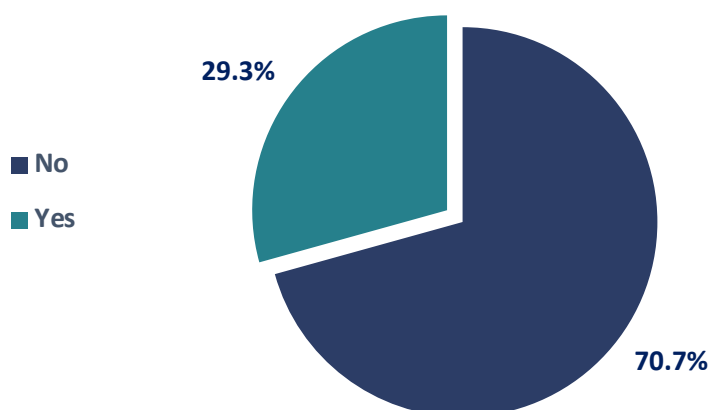
Challenges foreseen as consequences of foreign employees replacement



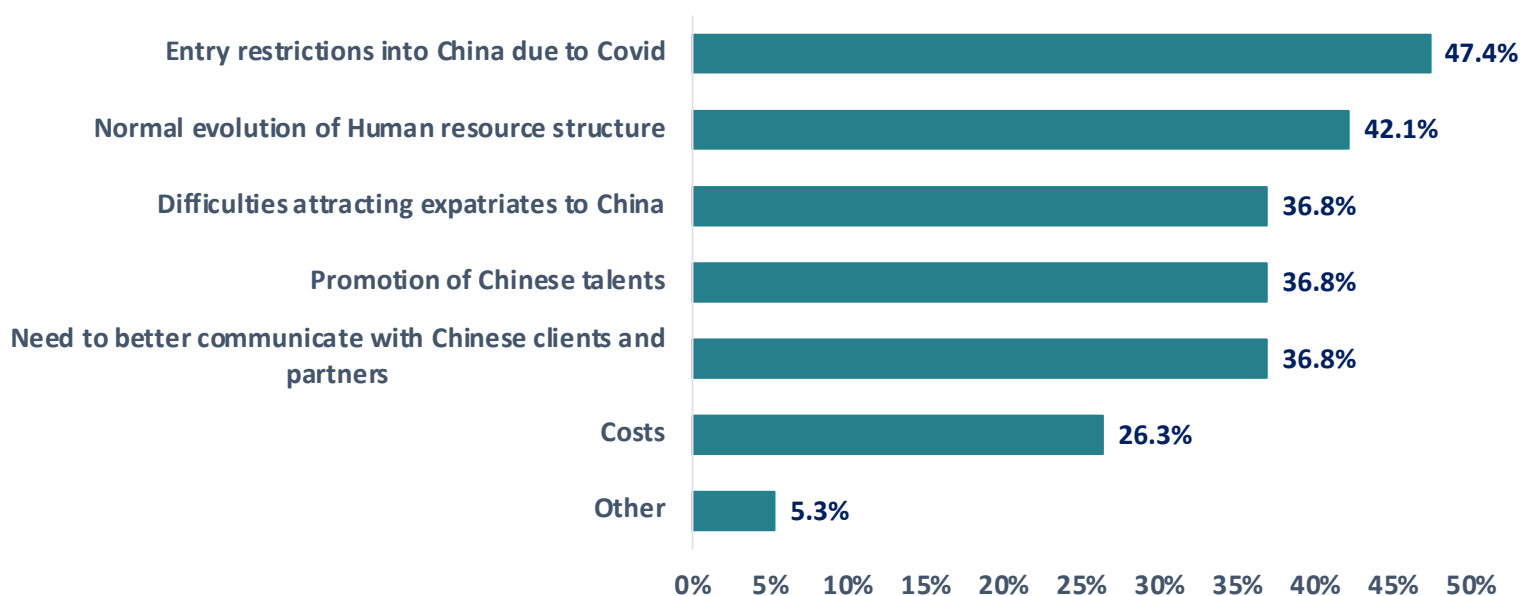
Reduction of foreign employees

Human resources trends for *Entrepreneur Local company* in China

Is your company replacing expatriates with Chinese employees?



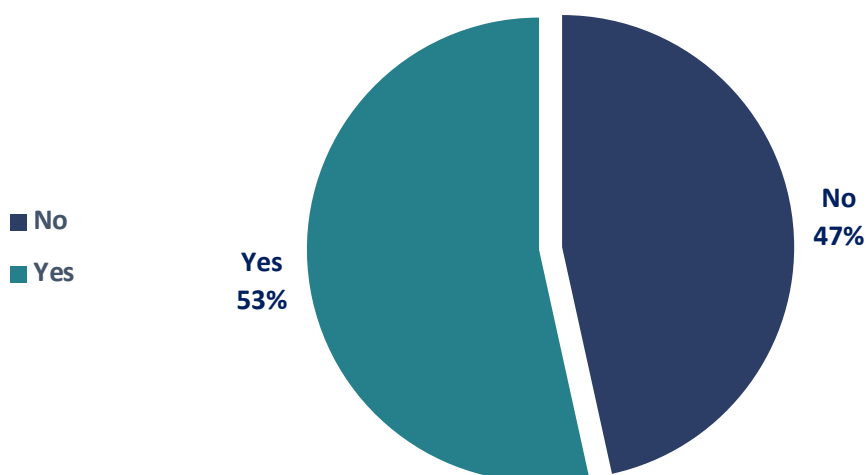
Reasons for the replacement of expatriates



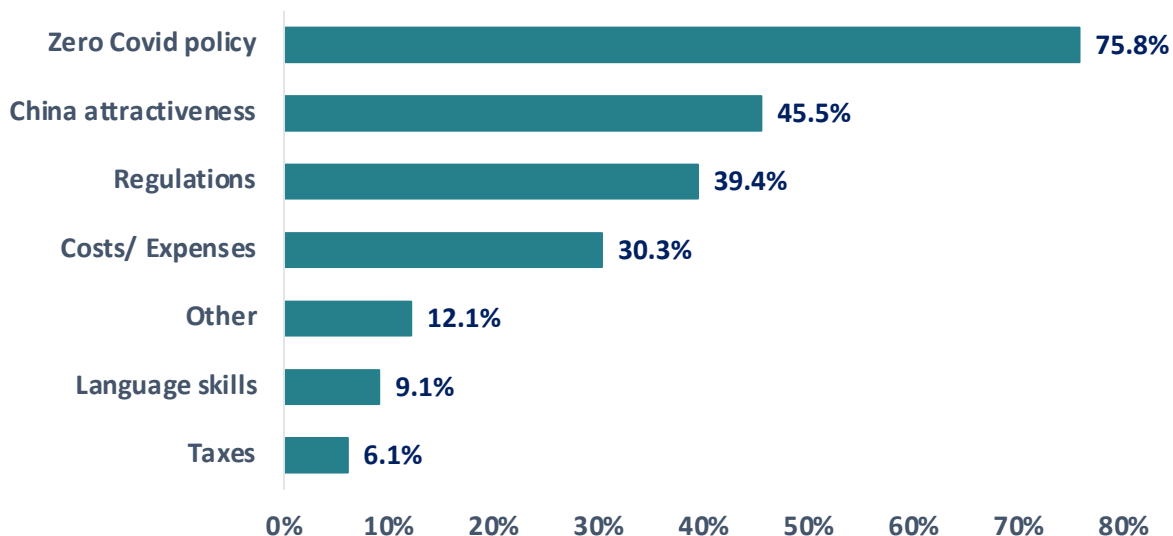
Reduction of foreign employees

Entrepreneur Local company

Are you facing issues in hiring non-Chinese employees?



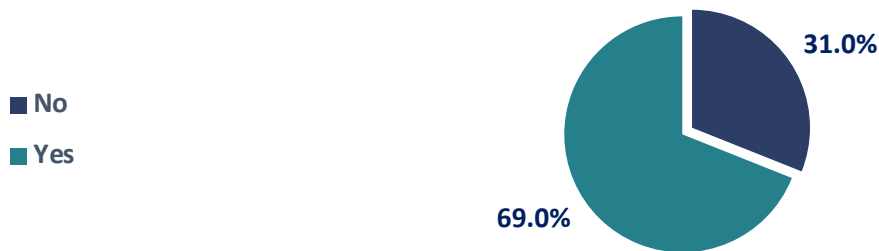
If you are facing issues with hiring non-Chinese employees, what are they?



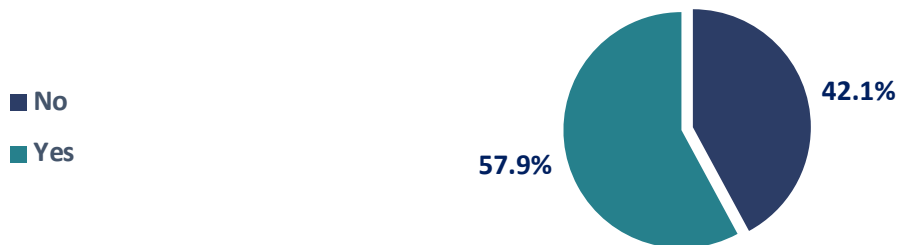
Perceptions of China and Impact on Investments

Entrepreneur Local company

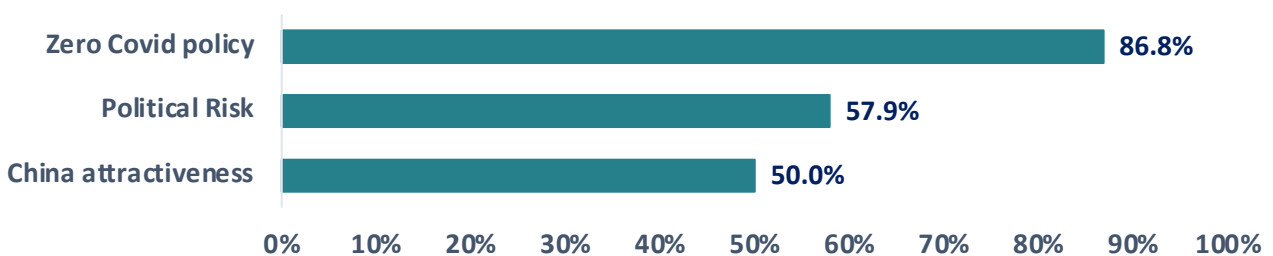
Have your overseas stakeholders/ partners had a change of perception toward China these past few months?



Do you feel communication with overseas stakeholders/ partners has become harder?



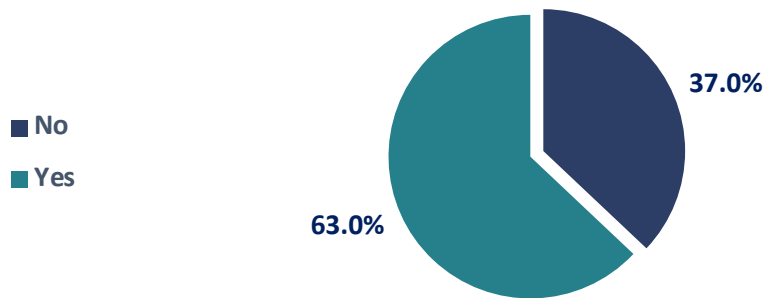
Here are the reasons why entrepreneur local companies are feeling that the communication with overseas stakeholders / partners has become harder:



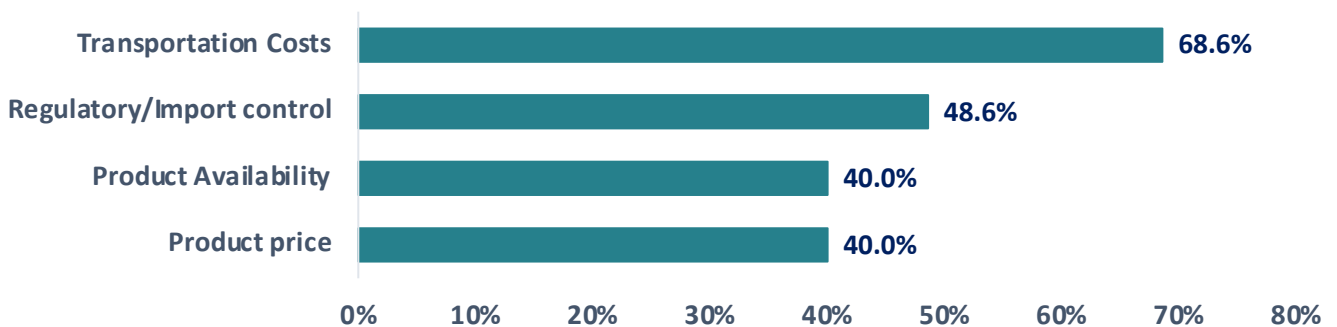
Supply chain

Subsidiary of a French company in China

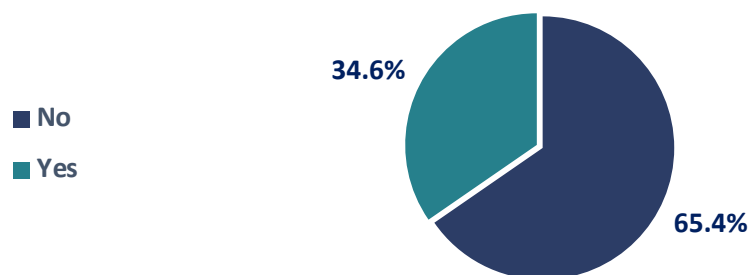
**Do you feel it is harder to import products/
materials ?**



**Reasons that make it harder for entrepreneur local
companies import products/materials**



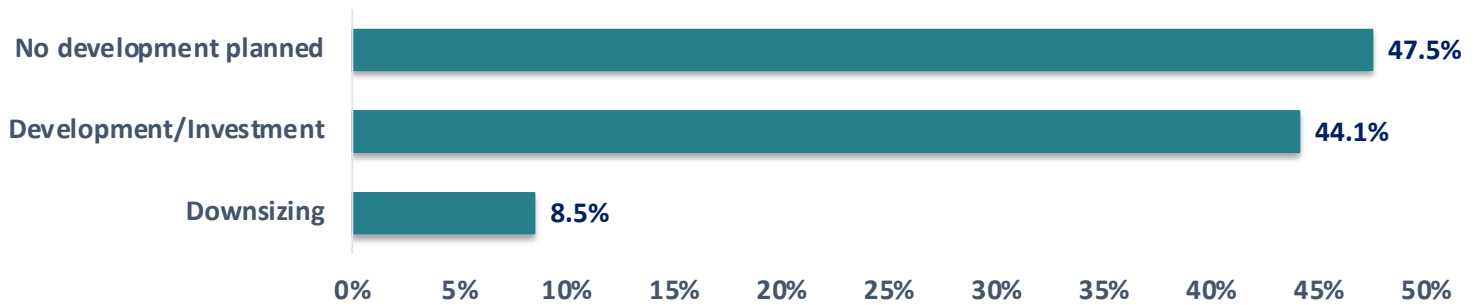
**Have you already faced a situation where
you were unable to replace the foreign
supply by a local supply?**



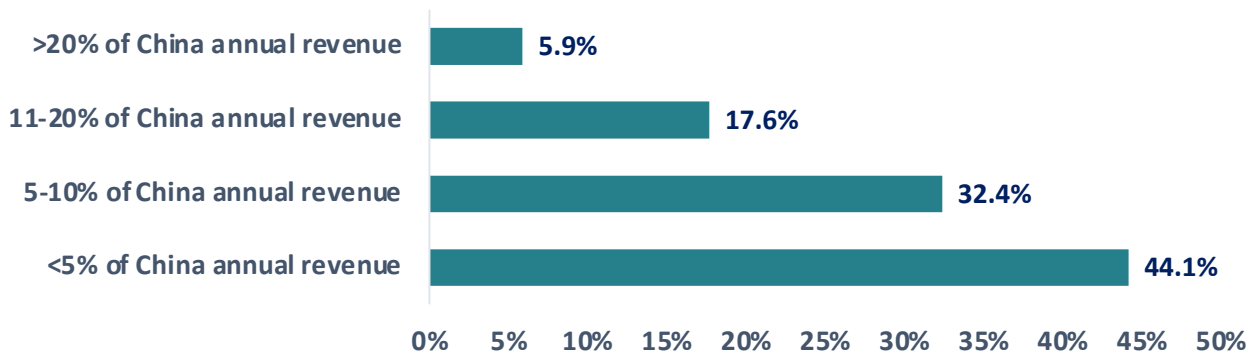
Perception of China and Impact on Investments

Entrepreneur Local company

How do you plan to develop your activity in the next 3 years?



In case of investment/acquisition, how much would you be likely to increase your company's investments in China?



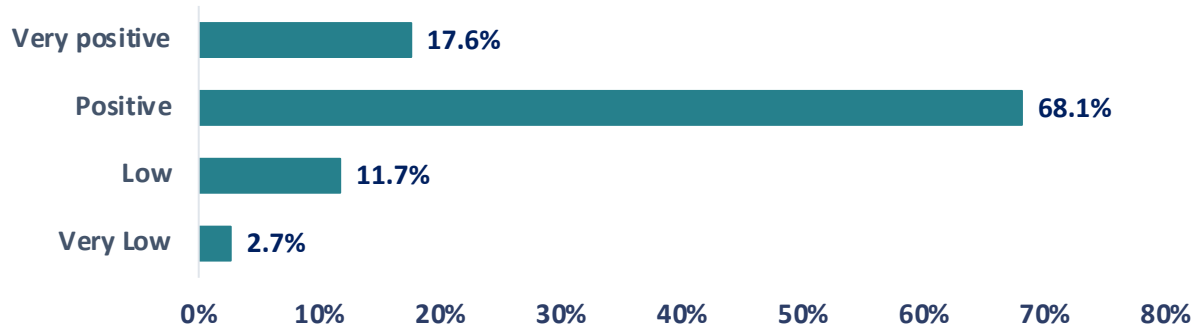
Reasons for non-investment:

- "Uncertainty of the local environment"
- "Changing market"
- "Wait and see how situation evolves"
- "No perspective"
- "Not enough resources"
- "No business need, focus on other markets"

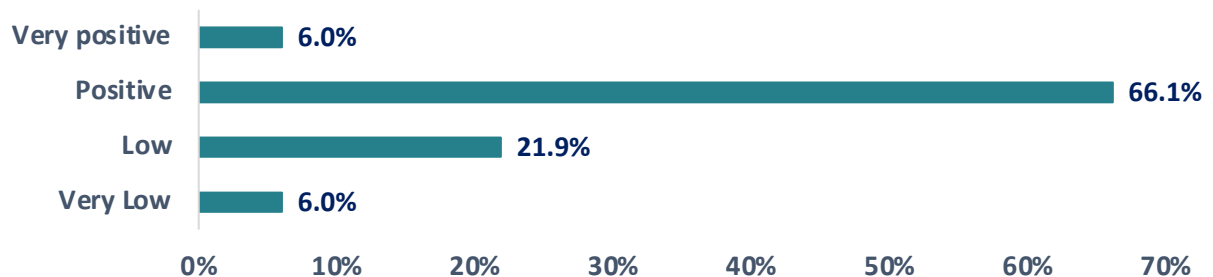
Innovation and R&D

*Subsidiary of a French company in China
& Entrepreneur Local company*

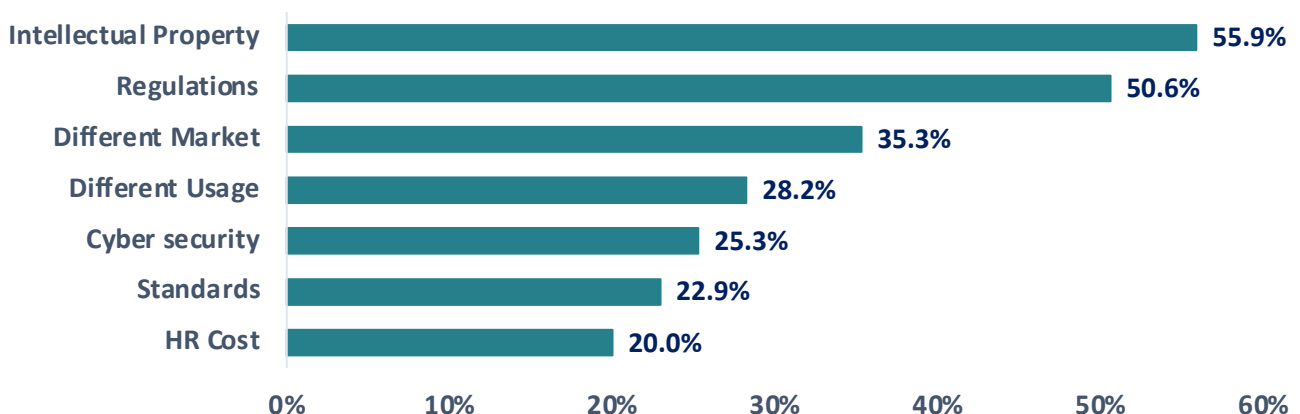
How do you assess the innovation capacities in China?



How does your head office assess the innovation capacities in China?



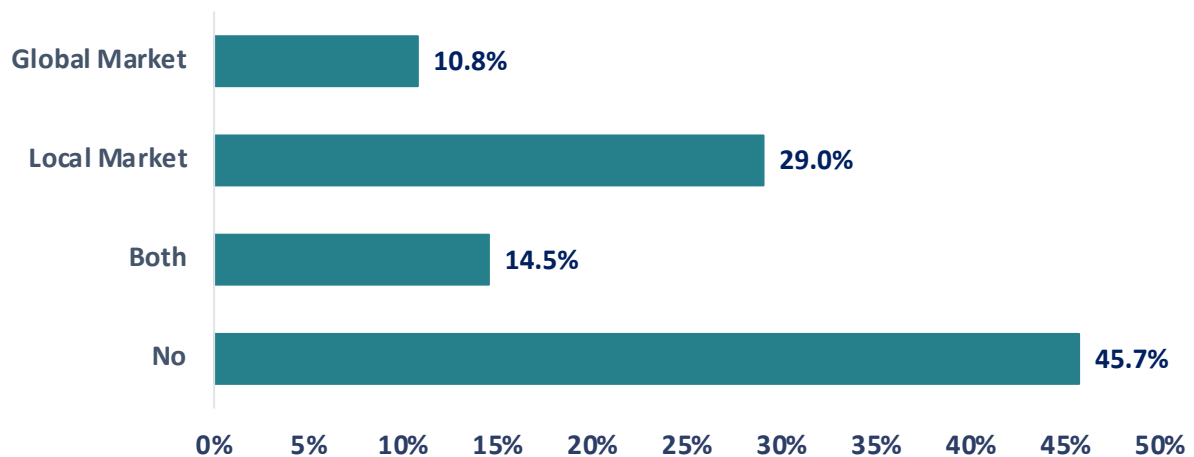
Have you identified obstacles to the development of innovation in China ?



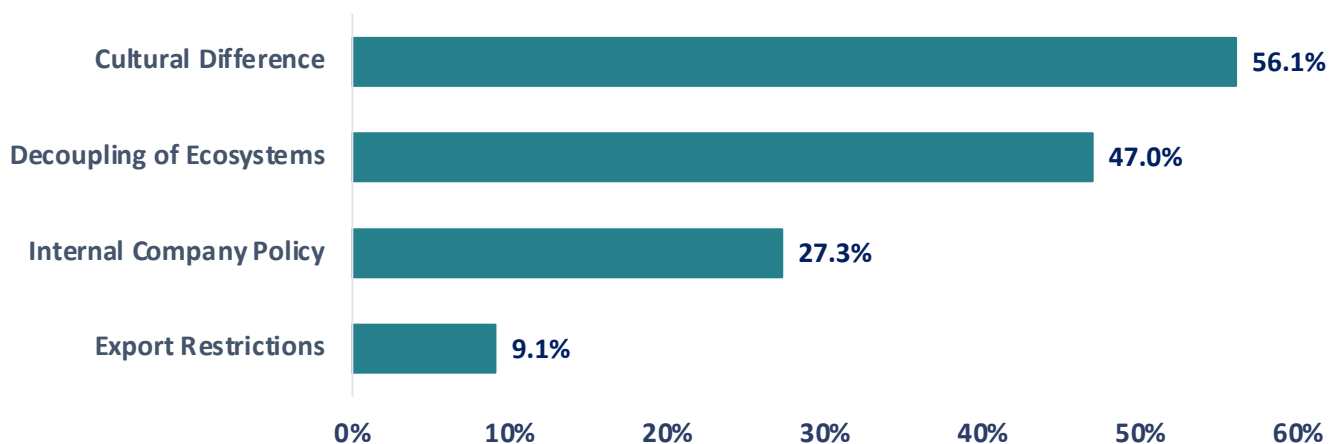
Innovation and R&D

*Subsidiary of a French company in China
& Entrepreneur Local company*

**Does your company invest in research & development
in China, and if so, for which market?**



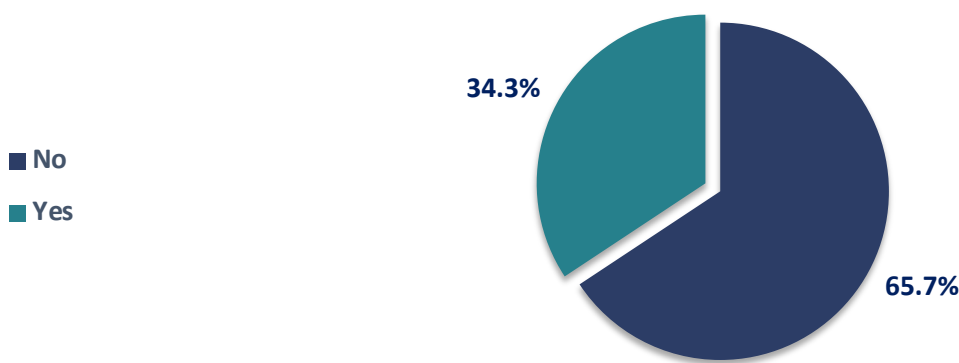
If you have selected “Local Market” only, why?



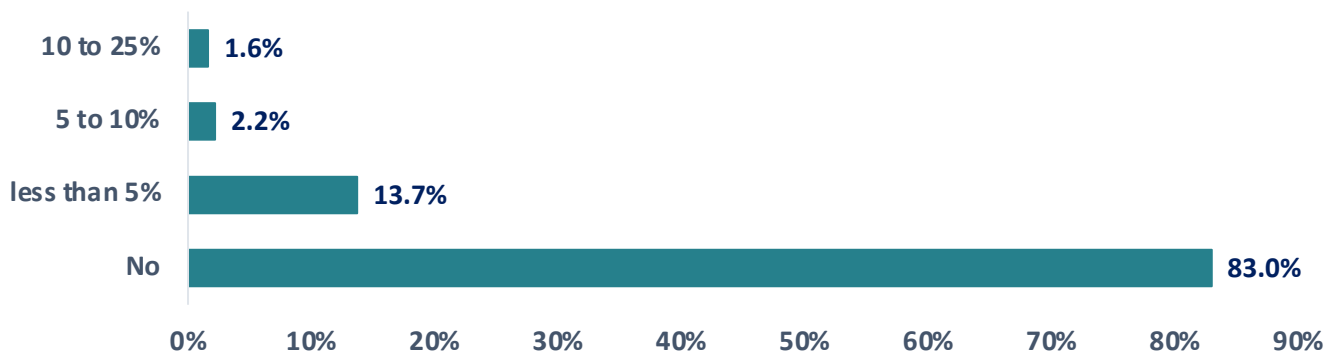
Innovation and R&D

*Subsidiary of a French company in China
& Entrepreneur Local company*

In your company, does the intellectual property protection policy encourage limiting R&D activities in China?



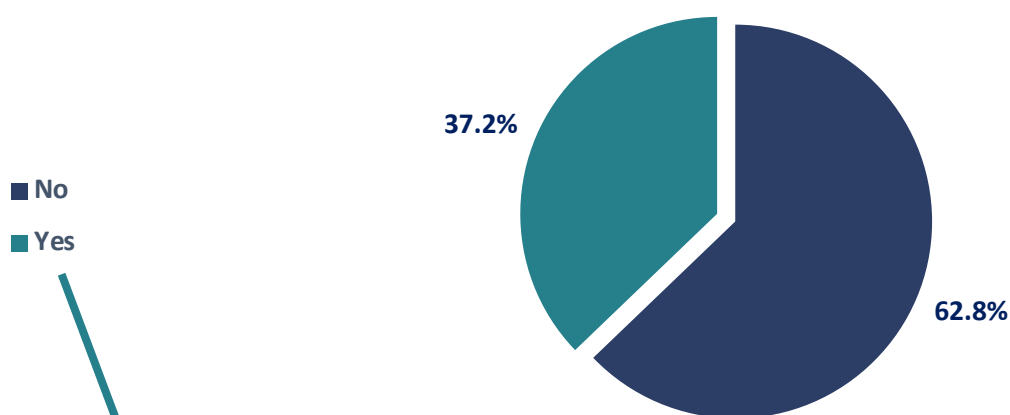
Does your company benefit from government funding supporting R&D investment in China?



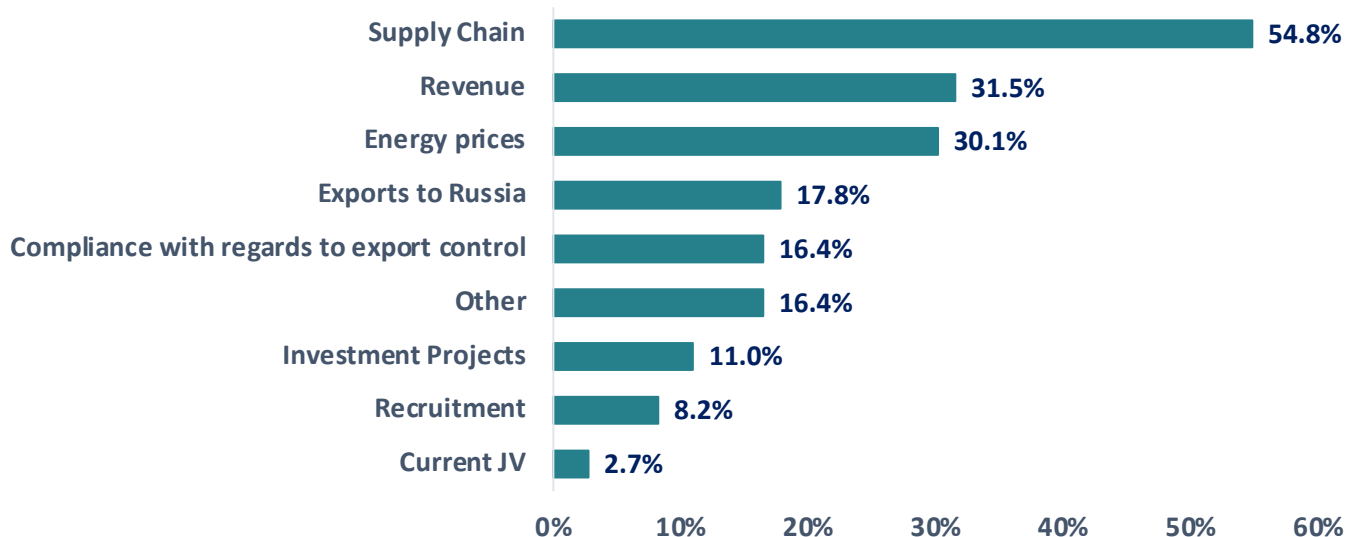
Impact of the invasion of Ukraine by Russia

All companies included

Impact of the invasion of Ukraine by Russia on operations in China



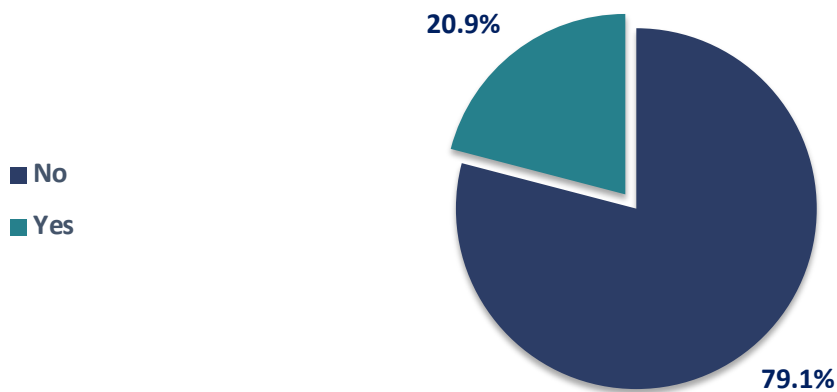
Company operations impacted by the invasion



Impact of the invasion of Ukraine by Russia

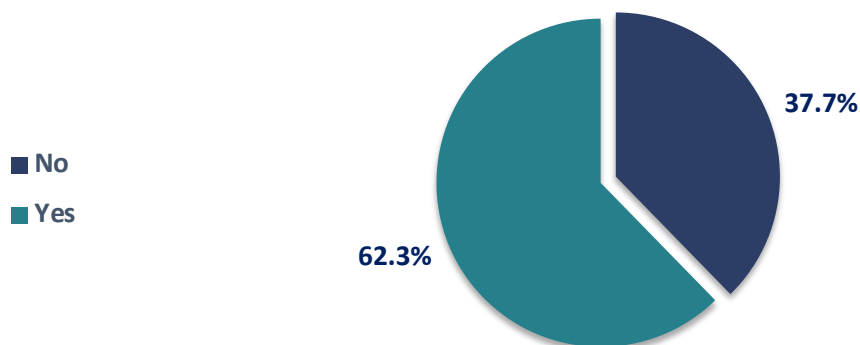
All companies included

Impact of European and American sanctions



↓

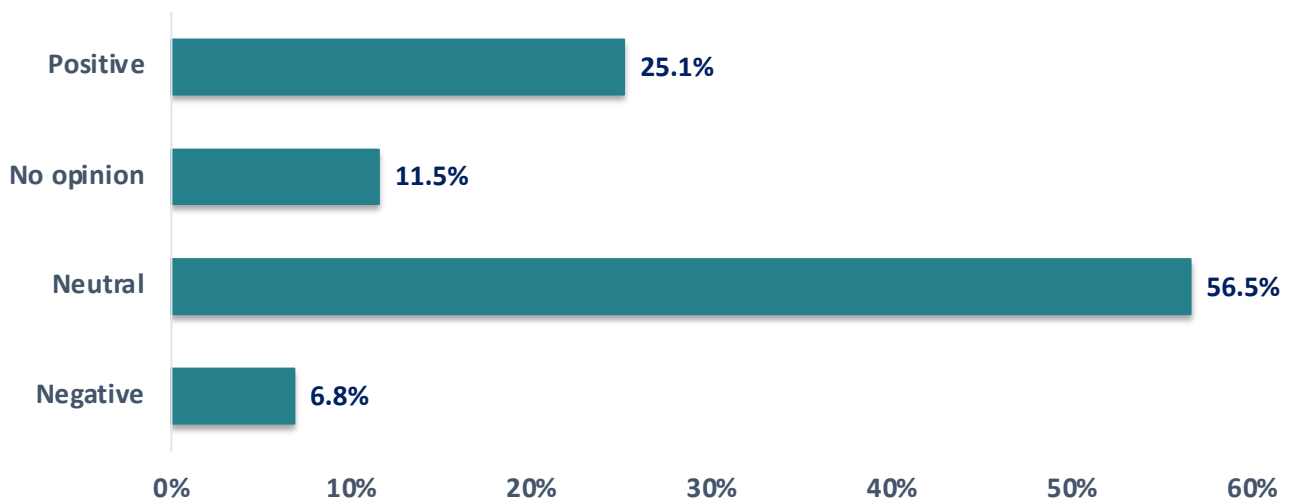
Monitoring effort of the EU and US sanctions to avoid potential impact



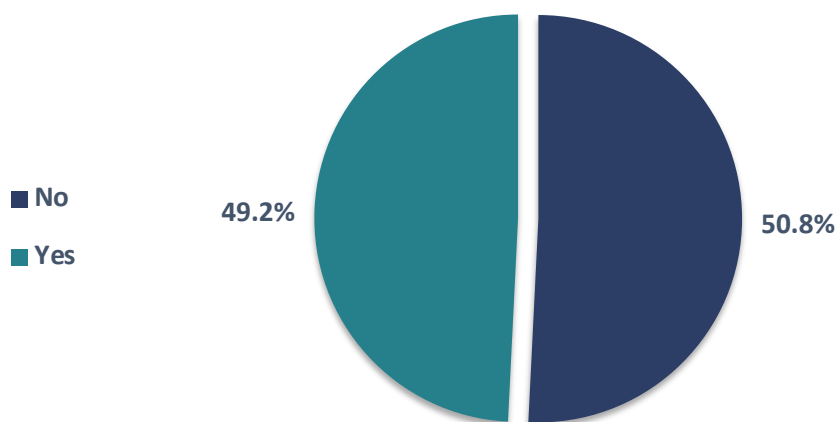
Impact of the invasion of Ukraine by Russia

All companies included

France's image in the eyes of the employees since the beginning of the conflict

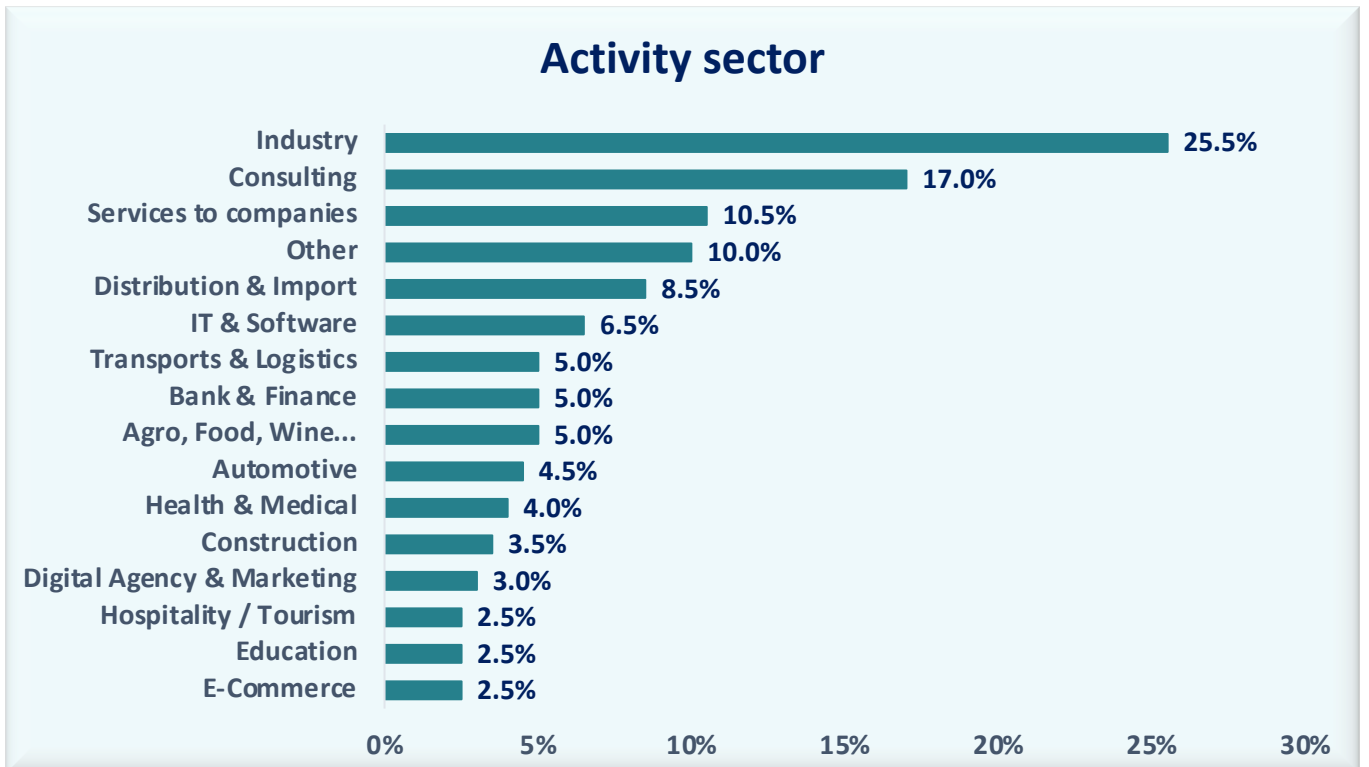


Are the foreign employees concerned about their presence in China as a result of the invasion?



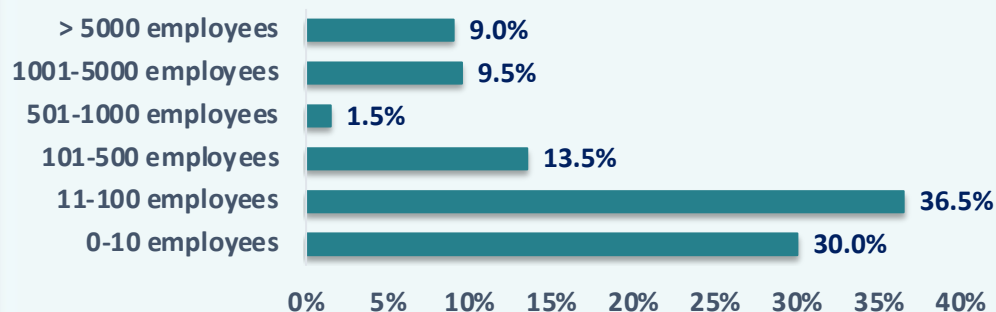


Profile of Respondents

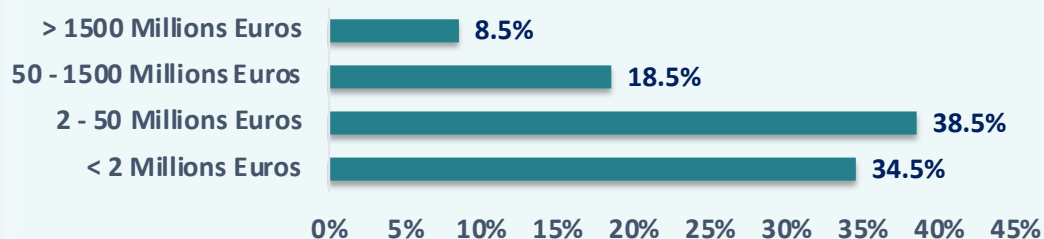


Profile of Respondents

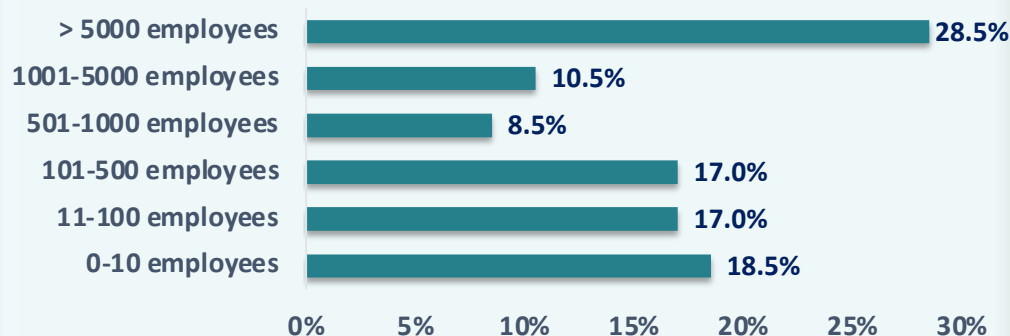
Number of employees in China



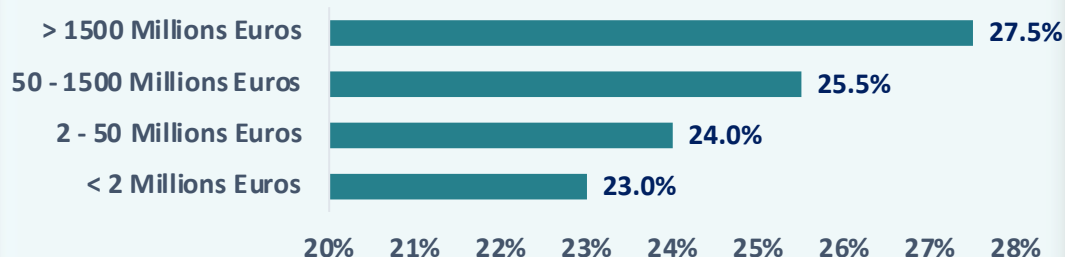
Company turnover in China (in Million Euros)



Number of employees worldwide

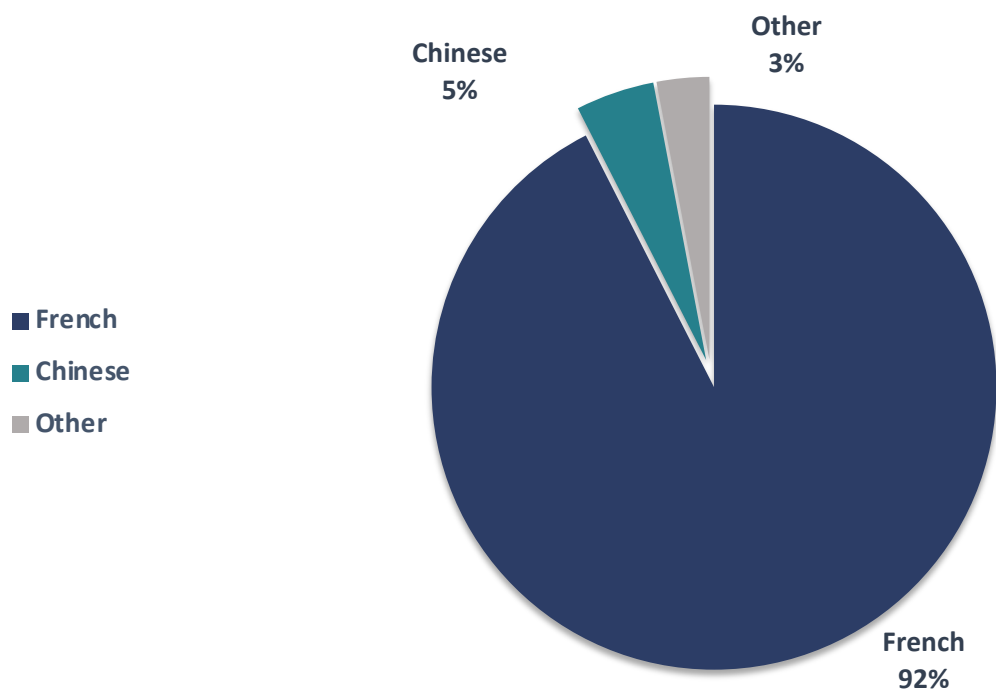


Company turnover worldwide (in Million Euros)

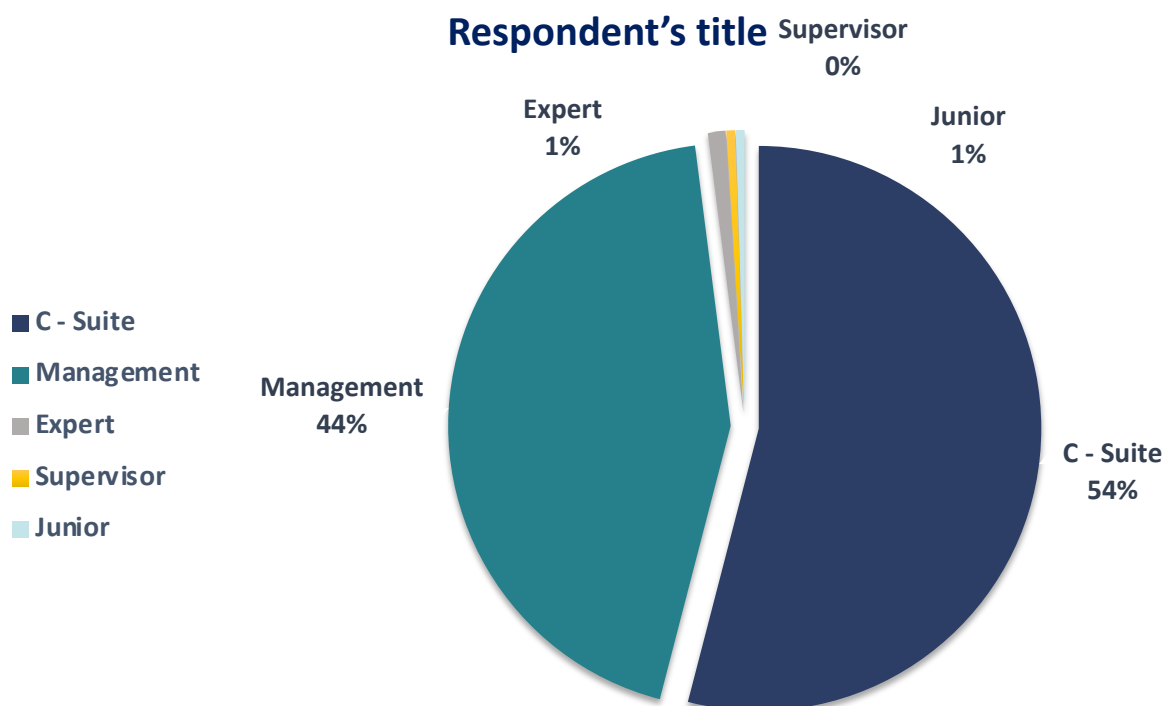


Profile of Respondents

Respondent's nationality



Respondent's title



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Merci

