

Global Policy Application Support Service Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G8C8417A4ED4EN.html>

Date: July 2026

Pages: 191

Price: US\$ 3,660.00 (Single User License)

ID: G8C8417A4ED4EN

Abstracts

The global Policy Application Support Service market size is predicted to grow from US\$ 8671 million in 2025 to US\$ 20783 million in 2032; it is expected to grow at a CAGR of 13.4% from 2026 to 2032.

Policy application support service refers to a specialized, full-process professional service provided by qualified organizations to enterprises and research institutions in China, aiming to assist them in obtaining financial subsidies, qualification recognitions, tax incentives, and special funds from government bodies at all levels (national, provincial, municipal, district, and industrial parks). The distinctive nature of this service stems from the complexity of China's unique industrial policy system: (1) multiple administrative tiers (each with independent policies); (2) frequent policy updates (annual changes in guidelines and evaluation criteria); (3) significant regional variations (different subsidy amounts, eligibility criteria, and assessment standards for the same qualification across localities); and (4) stringent documentation requirements (integrating financial, IP, R&D, HR, and other data). Consequently, enterprises cannot navigate this system alone, giving rise to a highly local professional service market with no global equivalent. Service scope includes policy scanning and interpretation, application strategy planning, qualification gap analysis and cultivation, proposal writing and packaging, online submission guidance, full-process tracking, evaluation defense coaching, post-award acceptance, and financial audit coordination. Core modules include High-tech Enterprise certification, Specialized & Sophisticated ?Little Giant? enterprise cultivation (Innovative SME, Specialized & Sophisticated SME, ?Little Giant?), Technology-based SME certification, Enterprise Technology Center certification, R&D super-deduction, technology transformation subsidies, and science & technology project applications. Service delivery models include full-process managed services, modular services, and annual retainer advisory.

China's policy application support service market reached approximately USD 8.86 billion (RMB 62.0 billion) in 2025, forecast to grow to USD 10.0 billion (RMB 70.0 billion) in 2026, with a CAGR of approximately 12.9%, significantly outpacing global averages. Volume: over 480,000 valid High-tech Enterprises (HTEs) nationwide, with 200,000-250,000 annual applications; cumulative Specialized & Sophisticated SMEs exceeding 100,000, including about 15,000 "Little Giants"; total entrusted projects in 2025 estimated at 2.5-3.0 million, with leading firm Shanghai Xiangying serving over 5,000 enterprises annually. Price tiers: HTE full-process managed service RMB 30,000-80,000 (USD 4,300-11,400); "Little Giant" application RMB 50,000-150,000 (USD 7,100-21,400); Innovative/Specialized SME certification RMB 10,000-30,000 (USD 1,400-4,300); Technology-based SME certification RMB 5,000-15,000 (USD 700-2,100); government grant applications RMB 20,000-60,000 (USD 2,900-8,600); R&D super-deduction annual retainer RMB 10,000-30,000 (USD 1,400-4,300); modular services RMB 5,000-20,000 (USD 700-2,900). Gross margins: Tier 1 national firms 50-70%; Tier 2 regional specialists 40-55%; Tier 3 small firms 30-45%. Downstream primary applications: manufacturing enterprises (45-50% of volume), technology & software firms (20-25%), emerging & startup enterprises (15-20%), agriculture & food processing (5-8%), services & platforms (5-8%), Others

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