

# 中国人力资源服务业 白皮书 2009



White Paper for Human  
Resources Service  
Industry in China

萧鸣政 郭丽娟 顾家栋◎主 编  
严裕民 陈美娟 邱 建 萧 群◎副主编

北京大学人力资源开发与管理研究中心  
世博集团上海市对外服务有限公司



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## 前 言

当今的知识经济时代,科学技术是第一生产力,人力资源是第一资源,人力资源在国家经济建设中的作用日益重要,人才战略和人力资源开发已成为当今世界许多国家和地区的普适理念。

中国是世界上人口最多的国家,如何把人口压力转化为人力资源优势一直是我们的国家十分关注的战略问题。近十年来,我们党和国家领导人高度重视人力资源建设问题;2002年党和政府开始部署实施人才强国战略,大力开发人力资源,转换经济增长模式,促进中国的经济社会持续优化发展;2007年,党的十七大明确提出了“建设人力资源强国”与“更好实施人才强国战略”的目标,并且把人才强国战略写进党章之中。这既符合中国国情,又是实施国家发展战略的必然要求。然而,如何把这一国家战略理念变成经济社会建设的实际力量,这既需要行政管理部门的推动,又需要专家学者的促动,更需要人力资源服务市场的驱动与人力资源服务行业的带动。

在人才强国战略实施过程中,人力资源服务业的发展肩负着重要的使命。党的十七大报告中特别指出:“建立统一规范的人力资源市场。”2007年3月,国务院发布《关于加快服务业发展的若干意见》(国发[2007]7号),明确提出,要“发展人才服务业,完善人力资源配置体系”,并且要“扶持一批具有国际竞争力的人才服务机构”。“人才服务业”第一次被写入国务院文件。党中央、国务院高度重视人力资源市场与人力资源服务业的发展。2008年12月12—14日,中共中央总书记、国家主席胡锦涛在辽宁考察时专门考察了沈阳人力资源市场。2009年2月8日,中共中央政治局常委、国务院副总理李克强在广东考察时,考察了东莞智通人才市场。2009年3月30日,中共中央政治局常委、国务院总理温家宝在湖北武汉考察了“起点人力资源市场”。2009年4月3日,中共中央政治局常委、中央书记

处书记、国家副主席习近平在河南省人才交流中心视察了人才招聘会现场。大力发展人力资源服务业已经得到我们党和国家领导人的高度重视,应成为我们这一代人甚至几代人为实现人才强国战略目标的历史责任和重要任务,它已成为扩大就业、促进创业与建设和谐社会的必然要求,是目前我国促进就业工作中的一项迫在眉睫的重要任务。

因此,在这个背景下,政府管理部门、企业、人力资源教学与研究工作的相关者特别需要通过一定的渠道来了解中国人力资源服务业的发展情况与问题。为了及时反映与系统总结新中国人力资源服务业的发展现状与趋势,北京大学和上海对外服务有限公司主动出人出力,积极进行研究探索,自2007年共同合作,发挥在各自领域的优势,联合人民出版社共同发布《中国人力资源服务业白皮书》。与其他致力于人力资源管理和建设的单位一样,目的是要推动中国的人力资源服务业发展得更好更快,为我国的人力资源开发与管理事业献计献策,为我国的人才强国战略尽一份心、献一份力,这是我们所肩负的时代使命和不可推卸的神圣职责。

每一年,我们都面临着新的国际国内环境;每一年,我国人力资源服务业都有新的发展;每一年,我们编委会都面临新的挑战。

2007年度白皮书是一次初步的尝试,该书比较系统地介绍了我国人力资源服务业的总体发展情况、服务产品、服务机构以及相关政策法规等。在此基础上,又对整个行业的前景及发展趋势进行了初步分析预测,并对未来的发展提出了策略性的建议。

2008年,我们对2007年度白皮书的市场反应进行了密切跟踪,大量搜集读者的反馈信息,在充分采纳社会各界的意见和建议的基础上,推出了2008年度白皮书。2008年度白皮书在体例、结构及资料来源等方面都有了大幅度的调整和改进,全书内容的深度、广度、思想性及数据资料的时效性也得到了显著的提高。

今年是新中国成立60周年。60年来,尤其是改革开放30多年以来,人才工作受到了党和国家的高度重视,取得了巨大的成绩,人力资源服务业获得了空前的发展。为了展示这些变化与发展,我们在前两年白皮书的基础上,在结构上作了新的调整和改进,今年的白皮书的内容主要分为两大部分。

第一部分是年度报告篇,这一部分共有四章。

第一章详细介绍了这一年来我国出台或修改的人力资源服务业相关政策法规,这些政策法规涉及劳动、就业促进及人才流动等方面。同时,本章还对我国政府为适应新的经济形势而对相关政策法规所进行的调整 and 改变进行了较深入的研究。

第二章则对影响人力资源服务需求的相关因素进行了研究和阐述,这些因素包括国家产业结构调整、区域协调发展、人力资源跨区域流动、人力资源成本控制、现代企业制度建立及社会发展等,并对由于这些因素的变动所导致的人力资源服务需求的新变化作了比较全面的分析。

第三章介绍了我国人力资源服务机构与从业人员,内容包括:我国人力资源服务机构的总体情况和发展动态;人力资源服务企业从业人员的数量变化及专业人才结构的变化;人力资源服务理念的转变及其对整个行业变化的影响等。

第四章对于国内外人力资源服务各业务领域的新的思路、新的经验及具有代表性的典型企业进行了详尽的介绍和深入的剖析,以期为我国人力资源服务业的进一步发展提供有益的借鉴。

第二部分为专题报告篇,分为四章。

第一章通过对人力资源服务业相关领域的政府官员、专家学者、协会领导、人力资源服务业企业高层经营管理人员及 500 强企业人力资源总监的访谈,从不同的视角为读者展示了改革开放以来我国人力资源服务业发展变化的全景。

第二章从专业化程度、研发能力水平、市场地位、品牌影响力、客户认可度及在中国的发展程度等维度出发,对我国境内人力资源服务企业作了较全面的比较分析,列出了各业务领域相对知名一些的企业,并对这些企业的有关情况作了展示。

第三章在对我国人力资源服务业进行了详细分析的基础上,对其发展方向作了预测,认为我国人力资源服务业的发展呈现出专业化、行业细分化、高附加值化、流程标准化及服务交付的个性化等趋势。

第四章对当前我国大学生就业形势作了分析,总结出其发展趋势,着重研究了 2009 年大学生就业的新变化和新发展,分析了“大学生就业难”的

原因,提出相应的对策建议,并重点指出要着重发挥人力资源服务业对于大学生就业的帮助和支持作用。

本白皮书由北京大学人力资源开发与管理研究中心主任萧鸣政教授和中国对外服务协会副会长、上海市对外服务有限公司董事长郭丽娟女士,中国对外服务行业协会顾问、上海人才服务行业协会会长顾家栋先生担任主编;上海市对外服务有限公司总经理严裕民先生、董事陈美娟女士、党委副书记邱建女士以及北京大学社会科学部副部长萧群先生担任副主编。

双方参加编写及项目工作的主要人员包括:金志峰、李江、汪敏敏、林赛、李昌臻、韩溪、罗湘军、陈昊、吕卉、刘喆斌等同志参加了第一部分的编写工作;张玉玲、金志峰、庄欢、陈菁、罗湘军、陈昊、吕卉、林赛、韩溪、刘喆斌、杨平同志参加了第二部分的编写工作;陈养铃、黄冰源等同志参加了英文目录及摘要的翻译工作;白皮书最后由萧鸣政与邱建负责统稿与修改工作,郭丽娟、顾家栋、严裕民与萧群等主编对全书进行了审稿,金志峰、高亚平、陈菁、吴志民、田雨、林赛、蔚树峰等同志参加了全书统稿的辅助工作。康磊、徐华等同志负责官方网站的建设及管理工作;龚祥和、周瑾等同志负责宣传工作;田雨同志协助主编负责项目综合协调工作。此外,张异凡、步星辉、焦慧卿、肖志康等同志也参与了白皮书编写的有关工作。

特别感谢中共中央组织部、中央人才工作协调小组办公室、国家人力资源和社会保障部相关部门及有关领导的大力支持和指导,感谢赵履宽、田小宝、程郁缀、徐湘林等专家对本书提出的宝贵建议,感谢有关行业服务机构和一些专家、学者的热情帮助,感谢人民出版社相关领导和编辑的大力帮助与支持。

编写白皮书的目的,是反映成绩,揭示问题,总结规律,推动发展,为中国人力资源服务业服务,为人力资源强国建设献力。我们奉行的宗旨仍然是:客观反映、系统揭示、积极推动。

国家与政府的人力资源开发与管理问题,一直是北京大学人力资源开发与管理研究中心研究的主要课题;为中国的人力资源服务业做大、做强贡献力量,一直是上海对外服务有限公司追求的目标。我们将联合更多的有识之士继续努力,推动中国人力资源服务业的发展,提升《中国人力资源服



务业白皮书》的质量,欢迎广大读者提出宝贵的意见和建议,以利于我们在今后的编写工作中不断改进和完善!

《中国人力资源服务业白皮书 2009》编辑委员会

2009 年 9 月 20 日

## FOREWORD

Science and technology constitute the primary productive force, and human capital should be the most important resource in this age of knowledge economy. Development of human resources (hereafter HR) and the strategies thereof involved have become a growing concern for more and more countries and regions in the world. Being a country with the largest population in the world, China's aim to build up a harmonious society could only come true if it can turn its large human resources into a strong one, which will provide powerful knowledge and talent support for China's modernization drive, boosting its core competitiveness and maintaining its leadership position in resources in such a fierce and complicated world.

Issues concerning HR development and management from a national perspective have always been a key research topic for the Center for HR Development and Management Research of Peking University. In a similar vein, the Shanghai Foreign Enterprise Service Company has also been looking to make its own contributions to helping make the HR service industry further larger and stronger. The two parties have been cooperating since 2007 to bring their respective strengths into full play by publishing *the White Paper for China's HR Service Industry* through partnering with People's Publishing House. As with other HR management and development organizations, they share the same goals of promoting a better and faster growth of China's HR service industry, offering ideas and strategies for HR development and management, and dedicating their efforts and energies to China's strategy to reinvigorate itself through human resources, which are the mission for our era and the sacred and compelling obligation for our Chinese people.

The international and domestic environments change each year, and

China's HR service industry also sees new development each year. These pose new challenges for the editing committee of the *White Paper*.

Our first attempt to publish a white paper for the HR service industry began in 2007. The 2007 *White Paper* offer a systematic overview of the development of HR service sector, services and products in the market, service providers and agencies, as well as related laws and regulations.

In 2008, we closely followed and monitored market reactions to the 2007 *White Paper*, and gathered a great many feedbacks from the readers. These suggestions and ideas found their way into our 2008 *White Paper*, which improved dramatically as a result of our substantial revision and adjustment of the format, structure, and sources of information. In addition, there were also marked improvements concerning the depth and scope of the contents, adoption of latest theories and validity of data in the 2008 *White Paper*.

China marks its 60<sup>th</sup> birthday this year. The HR service sector has drawn high attention from the central government and the Chinese Communist Party since the founding of the new China, particularly during the past thirty years when the country adopted an opening and reform policy. Great achievements have been scored with regard to the development of human resources along with the unprecedented growth of the HR service sector. To reflect the great changes and development of this sector, we have once again, decided to make some structural adjustments and revisions in accord with our experiences gained from compiling the *White Paper* over the past two years. The 2009 *White Paper* mainly consists of two parts:

Part one deals with the annual survey of the HR service sector, which comprises four chapters.

Chapter one offers a detailed overview of the relevant laws and regulations that have been promulgated or revised over the past year by China. They are mainly concerned with the labor law, employment promotion law, and the mobility of talents and other issues. Meanwhile, this chapter also contains in-depth analysis of the adjustments and changes made to laws and regulations by the

country in a bid to cater for the new economic situations.

Chapter two contains researches and descriptions of relevant factors bearing upon the demands of HR services. These factors include the country's upgrades of industrial structures, coordinated development of different areas, the cross-region movements of talents, the cost control of human resources, the establishment of the modern enterprise system, as well as social developments. Comprehensive analyses were offered in this Chapter in line with new demands for HR services arising from these changing factors.

Chapter three introduces HR service providers in China and their employees. It offers an overview and latest development of the country's HR service agencies, changes in the number of employees in this sector and in the educational credentials of these professional talents, changing service philosophy of the sector and its impact upon the whole sector.

Chapter four offers detailed introduction and in-depth analysis of new theories, experiences and typical firms in different business lines of the domestic and international HR service industry in a bid to offer positive insights for the further development of China's HR service sector.

Part two consists of special reports, which can be divided into four chapters.

Chapter one contains interviews with government officials and experts related to the HR service sector, leaders of HR associations, senior managers of HR service providers, and HR directors of Fortune Top 500 companies. These interviews offer a big-picture landscape from different perspectives for the development and changes of China's HR service industry since the country's adoption of the opening-up and reform policy.

Chapter two offers a comparative analysis of domestic employment service providers from the perspectives of specialization, research and development capabilities, market positions, brand powers, customer recognition and business development in China. It also provides a list of relatively well-known firms in different service lines, followed by a detailed introduction to these firms.

Chapter three makes predictions for the future developments of China's HR service industry based on a thorough analysis of the industry, maintaining that the development of China's HR service industry will move towards specialization, market segmentation, offering high value-added services, standardization of procedures, and delivery of customized services.

Chapter four is concerned with the analysis of college graduate employment at present by offering a summary of the development trends. A special emphasis is placed upon the new changes and developments in the employment of 2009 college graduates. It lists some factors leading to the shortage of job opportunities for college graduates, and offers corresponding suggestions, highlighting the important roles played by employment service providers in helping and supporting college graduates land jobs.

Chief editors of the 2009 White Paper are Professor Xiao Mingzheng, head of the Center for HR Development and Management Research of Peking University, Ms. Guo Lijuan, Vice President of China Association of Foreign Service Trades and Chairwoman of Shanghai Foreign Service Company, and Mr. Gu Jia-dong, Advisor for China Association of Foreign Service Trades and President of Shanghai Human Resources Consulting Association. Deputy Chief Editors are Mr. Yan Yumin, General Manager of Shanghai Foreign Service Company, Ms. Chen Meijuan, Board Director of Shanghai Foreign Service Company, Ms. Qiu Jian, Deputy Party Secretary of Shanghai Foreign Service Company and Mr. Xiao Quan, Vice Director of the Office of Humanities and Social Sciences of Peking University.

The following people were also involved in the writing of this white Paper. Jin Zhifeng, Li Jiang, Wang Minmin, Lin Sai, Li Changzhen, Han Xi, Luo Xiangjun, Chen Hao, Lü Hui, and Liu Zhebin took part in the writing of Part One. Zhang Yuling, Jin Zhifeng, Zhuang Huan, Chen Jing, Luo Xiangjun, Chen Hao, Lü Hui, Lin Sai, Han Xi, Liu Zhebin, and Yang Ping were involved in the writing of Part Two. Chen Yangling, Huang Bingyuan and some others were in charge of the translation of table of contents and abstracts for each chap-

ter into English. Jin Zhifeng, Gao Yaping, Chen Jing, Wu Zhimin, Tian Yu, Wei Shufeng were in charge of the editing of the whole White Paper. Kang Lei, Xu Hua were responsible for the construction and management of the official website. Gong Xianghe, Zhou Jin oversaw the publicity campaign. Tian Yu also assisted the chief editors in coordinating the balanced progress of this project. In addition, Zhang Yifan, Bu Xinghui, Jiao Huiqing, Xiao Zhikang and some others were also partly involved in the writing of this White Paper.

We would like to express our gratitude to officials from the National Coordinating Office for Talents, and China's Ministry of Human Resources and Social Security for their support and guidance. Special thanks go to Mr. Zhao Lükuan, Mr. Tian Xiaobao, Mr. Cheng Yuzhui, Mr. Xu Xianglin and other experts, who have offered valuable suggestions for this book. We are also indebted to experts and scholars from different industry associations. In addition, we are also grateful to leaders and editors of the Editing Department of People's Publishing House involved for their support and help.

The goals of writing such a book are to display our achievements, to uncover problems, to summarize the inherent rules, to foster development, and to serve China's HR service industry, as well as to make our own contributions to the country's move to strengthen itself through human resources! We are still adhering to the same principles in writing this book: reflecting the facts as they are, unveiling problems and regularities in a systematic way, and promoting the development of HR service industry in a proactive manner.

We welcome all kinds of suggestions and opinions from the readers, which will be helpful for us to further improve and perfect our work when we prepare new White Papers in the future.

The Editorial Board of the White Paper of China's  
HR Resources Service Sector in 2009.

Sep 20th, 2009

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