



WHITE PAPER FOR HUMAN
RESOURCES SERVICE INDUSTRY IN CHINA

中国人力资源服务业 白皮书 2013

萧鸣政 郭丽娟 李 栋◎主 编
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前 言

2013年,是全面贯彻落实十八大精神的开局之年,是实施“十二五”规划承前启后的关键一年,是为全面建成小康社会奠定坚实基础的重要一年。这一年,新一届领导人以敏锐的目光深刻认识到国际经济竞争实质上是科技的竞争、人才的竞争,多次强调科教兴国、人才强国。2013年8月习近平同志调研时指出:“要把人才工作抓好,让人才事业兴旺起来,国家发展靠人才,民族振兴靠人才。”李克强同志在国务院机构职能转变动员电视电话会议上的讲话中指出:“要调整产业结构,在优化工业结构、推动现代农业发展的同时,大力发展服务业。服务业没有大的发展,转型升级就难以实现,消费拉动也拉不起来。”党和国家对人才与人力资源工作的重视以及对服务业的支持,为人力资源服务业的发展提供了坚实的政策基础和制度保障。

党的十八大报告提出,要贯彻劳动者自主就业、市场调节就业、政府促进就业和鼓励创业的方针,第一次将鼓励创业纳入就业方针,并要求引导劳动者转变就业观念,鼓励多渠道多形式就业,促进创业带动就业。新的就业方针进一步明确了劳动者、市场、政府在促进就业中应发挥的作用。早在“十二五”规划纲要中,我国已经明确提出要把加快包括人力资源服务业在内的现代服务业的发展作为经济结构战略性调整的主攻方向。人力资源服务业的发展将是我国经济转型、社会可持续发展的重要突破口。因此,要紧紧围绕民生为本、人才优先的工作主线,以最大限度地发挥市场机制的作用,提高人力资源服务业对于人才强国战略实施与创新性国家建设的保障能力、供给能力和促进能力。要不断完善服务体系,激发市场活力,营造良好发展环境,进一步引导人力资源服务机构依法经营、诚实守信、健全管理、提高素质,为人力资源的充分开发和利用提供支持、创造条件,为更好实施人才强国战略的发展战略服务。

为了继续落实《国家“十二五”发展纲要》与《国家人才发展中长期规划纲要(2010—2020年)》的要求,贯彻党的十八大报告指示精神,进一步推动人才强国战略在人力资源服务业的深入实施,在国家人力资源和社会保障部人力资源市场司的大力支持与指导下,北京大学和上海市对外服务有限公司推出《中国人力资源服务业白皮书 2013》。我们秉承推动人力资源服务业更好更快发展的宗旨,对 2013 年度中国人力资源服务业的发展状况进行了系统梳理,并从理论的高度对实践进行了深入分析,通过理论归纳、事实描述、数据展现、案例解读和科学预测等方式,力图在读者面前全面展现中国人力资源服务业的发展现状、重点领域和最新进展。为适应经济全球化、发展国际化的需要,2013 年的《白皮书》首次拓宽了国际视野,对国外人力资源服务业的现状和经验做了介绍,并且在此基础上进一步做了中外比较与分析。

《中国人力资源服务业白皮书 2013》紧密把握时代发展脉搏,在结构和内容上都做了大量的更新和调整,主要包括以下几个方面:

第一,继续关注保障层面的新变化和新进展。白皮书全面总结了过去一年与人力资源相关的政策和法规的调整,深入分析了人力资源服务业领域主要政策和法规的新变化和新特点,便于人力资源服务机构适应新变化,谋求新发展。

第二,关注人力资源服务业的国际化。白皮书用专门章节对国外人力资源服务业的新动态进行了介绍,展现了全球人力资源服务业的发展状况,并将中国人力资源服务业与国外人力资源服务业进行了深入比较,拓展了中国人力资源服务业白皮书的国际视野。

第三,关注人力资源服务领域的热点业务。对人力资源服务领域的热点业务做了补充和更新,科学梳理和细致分析了业务的特点与发展,并以该业务的标杆企业为例介绍了其相关的业务实践。尤其介绍了近来热门的高级人才寻访服务和人才测评服务,为其他人力资源服务机构提供参考。

第四,继续关注行业发展的重大走向。白皮书对人力资源服务业的部分研究成果和专业研究机构进行了展现。在专家评价和公共参与的基础上,2012—2013 年促进人力资源服务业发展十大事件评选继前两年的成功开展后又继续进行,旨在记录人力资源服务业的跨越式发展进程中的重大

事件,同时提高全社会对人力资源服务业的关注和重视。

白皮书共分为三个部分,具体结构如下:

第一部分为年度报告篇,共分为四章。第一章从劳动合同法修正案、收入分配、维护和谐劳动关系、对外劳务合作及社会保障五个角度对 2013 年度国家颁布的人力资源服务业相关的法律、法规及政策进行了梳理和解读,以完整地展现人力资源服务业面临的政策法规的新变化。

第二章从国家产业结构、区域经济协调发展、组织及个体人力资源需求四个层面,由宏观到微观对 2013 年度人力资源服务的需求及其新变化进行了描述和分析。

第三章介绍了我国人力资源服务业机构的概况、人力资源服务业机构的现状及变化、人力资源服务业从业人员的现状及变化、人力资源服务业机构服务理念的变化,并对以上变化进行了分析,以展现我国人力资源服务业发展的趋势和脉络。

第四章介绍了当前我国人力资源服务业的现状,对流动人员档案管理、人才测评服务、网络招聘服务、高级人才寻访服务、人力资源外包服务、管理咨询服务和人力资源软件服务等七种业态进行概括性介绍与分析。同时首次对欧美、东南亚等国家的人力资源服务业进行了分析,并且从基本数据、行业发展的起步年代、产业政策发布的年代和服务内容四个方面进行了中西方国家人力资源服务业的比较分析。

第二部分为专题报告篇,共分为四章。第一章依据当前中国人力资源服务行业的总体情况,根据各细分行业的发展现状和未来趋势,具体介绍了人力资源管理咨询服务、招聘服务、高级人才寻访服务、测评服务、劳务派遣服务、薪酬服务、福利服务、培训服务和人力资源业务流程外包服务等九大人力资源服务细分行业的基本情况与特点。分析研究了人力资源管理各类细分服务行业的发展现状、商业价值、核心竞争力、面临的问题和未来的趋势。

第二章采用文献研究、专家咨询座谈、机构个案访谈和重点区域问卷调查等多种研究方法,在国家人力资源和社会保障部人力资源市场司的大力支持与指导下,对我国人力资源服务业统计指标进行设计和研究。立足我国人力资源服务业的实际发展情况,结合我国人力资源服务业的管理方式

和分布范围,开展了网络问卷调查,在北京市人力资源和社会保障局人力资源市场处大力支持下,实现了对我国人力资源服务业统计指标的区域验证,尝试性地建立起了一个相对全面、客观与数量化的人力资源服务业信息实例库,以期通过数据分析从整体上来了解和把握人力资源服务业的发展情况与态势,便于政府与行业更好地规范与引导人力资源服务业的持续与科学发展。

第三章对人力资源服务业品牌进行了研究,介绍了人力资源服务业在国际品牌竞争新时期中的机遇和挑战,探讨了人力资源服务业品牌建设的关键点,并提出了中国人力资源服务业品牌建设的方案和设想。

第四章为2012—2013年促进人力资源服务业发展的十大事件评选,旨在记载中国人力资源服务业的发展历史延续性,让世人了解中国人力资源服务业在产、学、研三方面一年来取得的突破性进展与成绩。

第三部分系统介绍了我国人力资源服务业的结构名录和我国人力资源服务业的研究成果名录。

白皮书主编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原东浩集团副总裁、原上海市对外服务有限公司党委书记、董事长郭丽娟,东浩集团总裁助理、上海市对外服务有限公司党委书记、董事长李栋担任。上海市对外服务有限公司总经理葛平先生、党委副书记龚祥和先生以及北京大学社会科学部副部长王周谊先生担任副主编,杨河、于鸿君、李强、周岳明、刘波、周志忍、朱天飏、张宪民、朱庆阳、萧群、刘宏杰、徐建昌、陈洁平、罗湘军担任编辑委员会委员。

梅继霞、曹伟晓、陈华生、张龙、张博等同志参加了第一部分的编写工作;萧鸣政、赵源、胡鹏、王安琪、章梦昱、王晓峰等参加了第二部分第1章、第2章与第4章的撰写工作,罗湘军、吕卉、丁浩舟、周妍菁、严冬等同志参加了第二部分第1章部分与第3章的撰写工作;曹伟晓、伍芷蕾等同志参加了第三部分的编写工作;陈养龄、黄冰源等同志参加了前言、英文目录及摘要的翻译工作;赵源、罗湘军、吕卉、周妍菁等同志协助主编进行了全书的统稿工作;罗湘军、赵源、周妍菁等同志负责项目综合协调工作。

特别感谢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,感谢王克良司长、杨文财处长、田小宝、刘燕斌、陈军等领导的大力支持与指导,感谢张文贤、陈世华、朱农飞等专家对于本书提出的宝贵建议,

感谢北京市人社局有关部门与领导、其他相关行业服务机构和专家、学者的热情帮助和积极支持。

人才兴则民族兴,人力资源强则国家强。人力资源服务业对我国实施就业优先战略和人才强国战略具有重要的推动作用,在发挥人才效能和推动人才强国的进程中肩负着重要的历史使命。在我国经济、社会发展的关键时期,在凝聚中国力量实现中国梦的宏伟蓝图下,在中华民族的复兴之路上,人力资源服务业需要迅速发展壮大并作出应有的贡献。我们继续秉承客观反映、系统揭示、积极推动、方向探索的宗旨,希望《中国人力资源服务业白皮书 2013》能够对转变经济增长方式、实施人才强国战略与实现中国梦起到一定的推动和促进作用。

《中国人力资源服务业白皮书 2013》主编

2013 年 11 月

Preface

The Year 2013 is the first year to fully implement the spirit of the 18th CPC National Congress, serving as a critical bridge between the past and future for implementation of the 12th Five-Year Plan. Moreover, it is also an important year to lay a solid foundation for building a moderately prosperous society in all respects. In this year, the new leadership headed by President Xi Jinping and Premier Li Keqiang has launched their keen, all-seeing eye into a still wider world and is intensely aware that the international economic competition is essentially a competition in science and technology and a competition for talents. They have expounded repeatedly on the importance of the strategy of reinvigorating the country through science and education and the strategy of strengthening the country through human resources development. In October 2013, President Xi Jinping stressed during an investigation and study tour that "we must strengthen human resources development to power up the prosperity of human resources sector. And we must rely on well-trained professionals for our nation's development and rejuvenation." Premier Li Keqiang said in the Teleconference on Mobilization for Transforming the Functions of State Council, "We shall promote industrial restructuring by optimizing industrial upgrading and developing modern agriculture, and give priority to the services sector. Without a sound service industry, China can hardly achieve transformation and upgrading, and the driving force of consumer spending for China's growth won't be strong enough." The great importance the Party and the State have attached on human resources development and the human resource sector and their support on developing the service industry have laid a solid policy foundation and institutional guarantee.

The report delivered at the 18th CPC National Congress has pointed out that

we must implement the principle of promoting self-reliant employment, market-regulated employment and government-backed employment and entrepreneurship. This is China's first time to incorporate entrepreneurship encouragement into the employment policies. Moreover, the report also calls on all parties to ensure that people have realistic expectations about employment, encourage creating employment through multiple channels and forms, and expand job opportunities by creating new businesses. The new employment guidelines help make more explicit the role of worker, market and government in the promotion of employment. Back in the beginning of the 12th Five-Year Plan, China has clearly stated to focus on speeding up the development of the modern service industry (including the human resources service industry) as the top priority of strategic adjustment of economic structure. The development of the human resources service industry will be an important area where breakthroughs can be made in China's economic transformation and sustainable social development. In this sense, we need to focus on the main objectives of ensuring people's well being and talent-orientation with an aim of maximizing the value of market mechanisms, improving the guarantee capability, supply capacity and facilitation capacity of the human resources service industry in implementing the strategy of strengthening the country through human resources development and building China into an innovation-oriented country. We shall continuously improve the service system, stimulate market vitality and create a favorable environment for development. At the same time, we shall also further guide human resources service agencies to run businesses according to law with honest and trustworthy, establish sound management system and raise the quality of their workforce, so as to provide support and create conditions for the development and utilization of human resources and facilitate the implementation of development the strategy of strengthening the country through human resources development.

With an aim to continuously implementing the *Outlines of the 12th Five-Year Plan for Economic and Social Development in China* and the *Guidelines of National Medium-and Long-Term Human Resources Development* (2010—2012)

and to implementing the spirit of the report delivered at the 18th CPC National Congress for continuing to implement the strategy of strengthening the country through human resources development in the human resources service industry, with the strong support from and under the guidance of the Human Resources Market Department of Ministry of Human Resources and Social Security, Peking University and Shanghai Foreign Service Co., Ltd. are launching the *White Paper for Human Resources Service Industry in China 2013* for the seventh consecutive year. Guided by the principle of achieving even better and faster development of the human resources service industry, we have combed the development status of the human resources service industry in China in 2013 in a systematic way and made an in-depth analysis from a theoretical perspective on the practices. In so doing, we would like to give a full picture of the development status, the priority areas and the latest development of the human resources service industry in China through theoretical induction, fact description, data demonstration, case study, scientific projection and other methods. In order to meet the requirements of economic globalization and internationalized development, the *White Paper 2013*, for the first time, has extended its work to investigate international perspectives and provide an overview of the current status and experiences of the human resources service industry in foreign countries. On this basis, the *White Paper* makes comparisons and analysis between China and foreign countries.

Keeping pace with the times, the *White Paper for Human Resources Service Industry in China 2013* has made a lot of updates and adjustments on the structure and content, mainly including:

Firstly, it continues to focus on the new developments and progress on the securing system. The *White Paper* reviews the adjustments on HR-related policies and regulations in the past year, and makes an in-depth analysis on the new changes and new features of main policies and regulation related to the HR service industry, with an aim to facilitating HR service agencies to adapt to the new changes and seek new development.

Secondly, it attaches importance to the internationalization of the HR

service industry. The *White Paper* uses individual sectors to provide an overview of the new trends of the HR service industry in foreign countries, showing the development status of the HR service industry in the world and make an in-depth comparison of the HR service industry between China and foreign countries. This has extended the international perspectives of the *White Paper for Human Resources Service Industry in China*.

Thirdly, it pays attention to nationally and even globally focused businesses in HR service sector. It offers an update and extension of the focused businesses in HR service sector, making a science-based combing and careful analysis the features and developments of such businesses and using some benchmarking enterprises for such businesses as an example to explore their related business practices. In particular, it provides an overview of popular buzzwords these days including executive search services and talent assessment services for reference of other HR service agencies.

Fourthly, it continues to focus on major trends in the developments of the industry. This *White Paper* presents some research results and professional research institutions in the HR service industry. On the basis of expert evaluation and public participation, the poll for the Top Ten Events Leading to the Development of the HR Service Industry 2012—2013 is conducted again following two years of success. The purpose of this poll is to record the significant events in the leapfrog growth of the HR service industry, and bring more attention from the whole society on the HR service industry.

This *White Paper* is divided into three parts with the following structure:

Part I, *Annual Reports*, is divided into four chapters. Chapter 1 teases out and interprets laws, regulations and policies related to the HR service industry enacted by the State in 2013 from 5 aspects, i.e., the Labor Contract Law Amendments, income distribution, maintaining harmonious labor relations, overseas labor service cooperation and social security. It aims to revealing, in a comprehensive way, the new changes in policies and regulations faced by the HR service industry.

Chapter 2 describes and analyzes the requirements and new developments of HR services in 2013 from 4 aspects (i.e., China's industrial structure, coordinated development of regional economy, organizational and individual HR demand) at both macro and micro levels.

Chapter 3 provides an overview of HR service agencies in China, the current status and changes of HR service agencies, the current status of and changes in the labor force in the HR service industry and the changes in service concepts of HR service agencies. This chapter also makes an analysis on the above-mentioned changes with an aim to revealing the development trends and trajectory of the HR service industry in China.

Chapter 4 describes the current status of the HR service industry in China, offering a general overview and analysis on seven segments, i.e., personnel file management for migrant workers, talent assessment services, online recruitment services, executive search services, human resources outsourcing services, management consulting services and HR software services. Meanwhile, this chapter, for the first time in the *White Paper*, makes an analysis on the HR service industry in the developed countries in Europe, America, and Southeast Asia. It offers a comparative analysis of the HR service industry between China and western countries from 4 aspects, i.e., basic data, the year when the country started to develop the industry, the year when the country started to publish its industrial policies and service content.

Part II, *Special Reports*, is divided into four chapters. Based on the general conditions of the HR service industry in China as well as the current status and future trends of each segment, Chapter 1 describes the basic situation and features of nine segments in the HR service industry, i.e., HR management consulting services, recruitment services, executive search services, assessment services, labor dispatch services, payroll services, welfare services, training services and HR business process outsourcing services. It analyzes the current status, commercial value, core competitiveness, problems and future trends of each segment in HR management.

With the strong support from and under the guidance of the Human Resources Market Department of Ministry of Human Resources and Social Security, Chapter 2 uses multiple research methods (including literature study, expert consultation and seminar, case interview and questionnaire survey in key areas) to design and study the statistical indicators for China's HR service industry. Based on the actual development of China's HR service industry and in keeping with the management methods and distribution of China's HR service industry, we conducted an internet-based questionnaire and thus implemented the regional verification of the statistical indicators for China's HR service industry, with the strong support of Human Resources Market Department of Beijing Municipal Human Resources and Social Security Bureau. In so doing, we have tentatively established a relatively comprehensive, objective and quantitative case library for the HR service industry that can help us better understand the current status and trends of the HR service industry as a whole through data analysis and can help the government and the industry to better regulate and guide the sustainable and scientific development of the HR service industry.

Chapter 3 studies the brands in the HR service industry and provides an overview of the opportunities and challenges the HR service industry faces in a new era of international brand competition. This chapter also discusses the key points to building a brand for the HR service industry, thus putting forward plans and ideas for brand-building of China's HR service industry.

Chapter 4 is all about the poll for the Top Ten Events Leading to the Development of the HR Service Industry 2012—2013. The purpose of this poll is to record the historical continuity of China's HR service industry development, and sheds light on breakthroughs and accomplishments China's HR service industry has achieved in enterprises, universities, and research institutes over the past year.

Part III provides a systematic overview of the structure directory of China's HR service industry and the directory of research results in China's HR service industry.

This *White Paper* is issued under the general editorship of Professor Xiao Mingzheng, Director of the Research Center of Human Resources Development & Management of Peking University and Guo Lijuan, former Vice President of Shanghai East Best International (Group) Co., Ltd., former Party-secretary and Chairperson of Shanghai Foreign Service Co., Ltd. And Li Dong, President Assistant of Shanghai East Best International (Group) Co., Ltd. and Party Secretary & Chairman of Shanghai Foreign Service Co., Ltd. And Mr. Ge Ping (General manager of Shanghai Foreign Service Co., Ltd.), Mr. Gong Xianghe (Deputy Party Secretary of Shanghai Foreign Service Co., Ltd.) and Mr. Wang Zhouyi (Deputy Director of Office of Social Sciences, Peking University) serve as deputy editors. Yang He, Yu Hongjun, Li Qiang, Zhou Yueming, Liu Bo, Zhou Zhiren, Zhu Tianbiao, Zhang Xianmin, Zhu Qingyang, Liu Hongjie, Xu Jianchang, Chen Jieping, Luo Xiangjun serve as members of the Editorial Board.

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No country can prosper unless it can develop, attract and retain talents with sound human resources development system. The HR service industry will actively promote the implementation of the strategy of giving priority to job creation and the strategy of strengthening the country through human resources development. It shoulders critical missions in the process of bringing out the best of talents efficiency and strengthening the country through human resources development. In the critical period of China's economic and social development with the grand blueprint of bringing our people together to realize our China Dream ahead of us, the HR service industry needs to develop rapidly and makes its due contributions to the great rejuvenation of the Chinese nation. We will continue to uphold the principles of objective reflection, systematic revelation, active promotion and direction exploration in hope that *White Paper for Human Resources Service Industry in China 2013* can play a role in promoting and facilitating the transformation of economic growth mode, the implementation of the strategy of strengthening the country through human resources development and realization of China Dream.

Editors-in-Chief of *The White Paper for Human*

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