

WHITE PAPER FOR HUMAN  
RESOURCES SERVICE INDUSTRY IN CHINA

# 中国人力资源服务业 白皮书 2012

萧鸣政 郭丽娟 主 编  
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# 《中国人力资源服务业白皮书 2012》

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## 前 言

2012年,我国人力资源服务业又迎来了关键的一年。中国共产党第十八次全国代表大会在11月8日召开。加快经济发展方式转变步伐,大力发展现代服务业继续成为十八大后我国社会经济的发展战略。胡锦涛同志指出,要在十六大、十七大确立的全面建设小康社会目标的基础上努力实现新的要求。要转变经济发展方式,推动服务业特别是现代服务业发展壮大,在促进社会经济发展的平衡性、协调性、可持续性明显增强的基础上,实现国内生产总值和城乡居民人均收入比二〇一〇年翻一番,这再一次为我国人力资源服务业的发展指明了前进方向。

2012年,我国颁布了《促进就业规划(2011—2015年)》,就业工作以民生为本,强调加快建立专业化、信息化、产业化的人力资源服务体系,以基本公共服务为基础,通过市场化服务产业壮大,来保障服务社会就业与人力资源开发配置能力提升。

人力资源服务业作为现代服务业的重要组成部分,在国家鼓励政策的指引下,围绕民生为本、人才优先的工作主线,坚持把人力资源服务业作为发展我国人力资源的突破口,把提高人力资源服务供给能力和促进人力资源服务业规范发展作为主要任务。人力资源服务业通过提供人才派遣、招聘、培训、管理咨询等服务,使人才充分服务于社会发展,通过薪酬管理、绩效管理使人才使用得到保障。人力资源服务业通过向行业客户提供高附加值的解决方案,为人才效能的充分发挥提供重要保证,为更好实施人才强国战略和扩大就业的发展战略服务。

为了继续深入落实《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)》的要求,贯彻执行党中央关于人力资源发展的重要指示精神,进一步推动人才强国战略在人力资源服务业领域的深入实施,转变经济增长方式实现科学发展,在国家人力资源和社会保障部人力资源

市场司的指导下,北京大学和上海市对外服务有限公司第六年推出《中国人力资源服务业白皮书 2012》。本书力争从理论和实践两个层面对中国人力资源服务业的发展状况进行系统梳理,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,让读者全面了解中国人力资源服务业的发展现状、重点领域、最新进展以及未来的发展方向,同时系统展现 2012 年中国人力资源服务业的重大事件和发展概况。与前五年的《白皮书》相比,《中国人力资源服务业白皮书 2012》在内容上有了一些新变化,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发展。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变化与调整,着重从关注民生以及和谐发展的角度,分析了人力资源服务业领域中的主要政策法规的新变化和新特点,从而为我国人力资源服务机构适应新变化、求得新发展指明了方向。

第二,关注产业创新发展。对我国的人力资源服务业态做了补充和更新,并以国内著名的人力资源服务机构为案例,分享他们的成功经验,在此基础上,对我国人力资源服务产业的未来发展创新思路进行了系统和详尽的论述。

第三,关注人力资源服务业产业的品牌建设。人力资源服务业品牌建设是当前中国人力资源服务业发展的关键问题,从人力资源服务业发展的层面上来说,关注人力资源服务业的品牌建设已经成为中国人力资源服务企业在发展过程中必须关注的重点。人力资源服务业品牌建设关系到中国人力资源服务产业的发展 and 壮大,关系到中国人力资源服务业是否能够跻身于世界一流人力资源服务行业的队伍之中。

第四,继续关注行业发展的重大走向。白皮书详尽地展现了人力资源服务业的专业研究机构和研究成果。通过网络、报纸的信息搜集和资料整理,全面梳理了 2011 年 6 月到 2012 年 6 月之间人力资源服务行业中发生的大事件,在专家评价和公众参与的基础上,选出了 2011 年 6 月到 2012 年 6 月之间中国人力资源服务行业的十大事件。

白皮书共分为三个部分:第一部分为年度报告篇,共分为四章。第一章全面介绍了我国人力资源服务业所面临的政策法规环境以及新的变化,着

重对 2011—2012 年国家颁布实施的有关人力资源服务业发展的法律、法规及政策进行梳理及解读,为政府、行业、学者提供参考。

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对 2012 年人力资源服务的需求及其新变化进行分析,提出人力资源服务与产业结构、区域经济发展、组织、个体发展之间具有互动关系。

第三章介绍人力资源服务机构和从业人员的新变化,主要包括:我国人力资源服务机构的基本情况、现状及变化;人力资源服务业的从业人员现状及变化;人力资源服务业的管理理念及变化,全面系统地展现了过去一年我国人力资源服务机构和从业人员的整体发展情况。

第四章主要关注我国人力资源服务业的发展。以介绍我国人力资源服务业的业态为基本内容,展示了我国人力资源服务典范企业和卓越人力资源管理企业的新面貌。提出中国人力资源服务企业需要在五个方面推进创新,包括人力资源外包服务价值创新、产品和服务体系创新、服务质量管理体系创新、服务信息技术创新、行业人才培养和发展创新。

第二部分为专题报告篇,共分为三章。第一章主要介绍了人力资源服务业中的招聘服务、劳务派遣、薪酬外包服务、弹性福利服务、企业员工健康管理服务、培训服务、人力资源管理咨询服务以及 BPO 服务的基本情况与特点,分析研究各类服务在其领域内的发展现状、商业价值与核心竞争力。并选取细分行业中具有代表性的企业进行介绍,以推动中国人力资源服务业的发展。

第二章对于我国当前人力资源服务业品牌建设的紧迫性、价值与意义进行了阐述。针对我国人力资源服务业品牌研究与建设的现状,分析了其中存在的问题,在借鉴其他行业品牌建设经验的基础上,对我国的人力资源服务业品牌的发展提出了建议和对策。

第三章在梳理 2011 年 6 月到 2012 年 6 月间人力资源服务行业中发生的大事件的基础上,评选出了影响中国人力资源服务业发展的十大事件,并一一给予点评。

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

本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

授和东浩集团副总裁、上海市对外服务有限公司党委书记、董事长郭丽娟女士担任。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萧群先生担任副主编,杨河、于鸿君、李强、周岳明、刘波、周志忍、朱天飏、张宪民、朱庆阳、刘宏杰、徐建昌、陈洁平、罗湘军担任编辑委员会委员。

梅继霞、张满、赵源、朱虹璇、李江、汪敏敏、罗湘军、吕卉、周妍菁等同志参加了第一部分的编写工作;吴新辉、步星辉、吴晓雪、罗湘军、吕卉、丁浩舟、周妍菁、严冬等同志参加了第二部分的编写工作;苏美东、李慧静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;邢凯旋、步星辉、罗湘军、吕卉、周妍菁同志协助主编进行了全书的统稿工作;秦丽芳、康磊、敖曼同志负责《白皮书》官方网站的建设及管理工作;罗湘军、肖小苹、吕卉、周妍菁、步星辉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,感谢毕雪融司长、余兴安副司长、杨文财处长、田小宝、赵乃真、陈军等领导的大力支持与指导,感谢张文贤、陈世华、周洪峰、朱农飞等专家对于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。人力资源服务业在发挥人才效能和推动人才强国的进程中担负着重要的历史使命,对于我国实现经济结构战略型调整、促进可持续发展具有重要作用。在我国经济和社会发展的关键时期,在深入落实科学发展观与实现中华民族伟大复兴的宏伟蓝图下,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 2012》能够对转变经济增长方式、实现科学发展和人才强国战略起到一定的推动和促进作用。

《中国人力资源服务业白皮书 2012》主编

2012 年 11 月 6 日



## Foreword

China's HR service industry greeted another pivotal period of development in 2012. The 18<sup>th</sup> National Congress of the Communist Party of China was held on November 8, which reaffirmed the country's development strategies as accelerating the transition of its economic growth model and the development of modern service industries. Chinese President Hu Jintao said that China will endeavor to achieve new goals on top of the mission of building up a all-around well-off society, which was set in the 16<sup>th</sup> and 17<sup>th</sup> National Congress of the Communist Party. The country will further carry out structural economic reforms, promote the development of service industries, modern service industries in particular, and double its 2010 GDP and per capita income for both urban and rural residents on the basis of making China's development much more balanced, coordinated and sustainable. Once again the new mission for the country points out the direction of development for China's HR service industries.

China released its *Employment Promotion Plan* (2011–2015) in 2012. This people-first employment framework puts emphasis on the creation of an industrialized HR service system featuring professionalism and wide use of information technology, and points out that the HR service industry should develop on the basis of providing public services and market-oriented services to ensure the creation of more job opportunities and the improvement of talent allocation mechanisms in China.

The HR service industry constitutes one of the important components of the modern service industries. Blessed with the supportive policies from the central government, the HR service industry should always be people-oriented and talent-oriented. The HR service industry should first achieve a break through in

China's human resources development, and its primary tasks should be the steady supply of HR services and standardized operations. By offering services such as labor dispatch, recruitment, training and management consulting, the HR service industry plays a positive role in making sure that all professionals serve the development of society. Services like payroll management and performance management will ensure that the personnel should be rightfully employed and rewarded. In addition, the HR service industry helps its customers tap into the full potentials of their employees by offering high value-added solutions. All in all, the HR service industry offers indispensable services for China's strategies of invigorating itself through human resources and creating more job opportunities.

In order to further carry out "*China's Medium and Long-term Talent Development Plan (2010-2020)*", implement the important guidance for the development of human resources from the CPC Central Committee, further promote the implementation in the HR service sector of the country's strategy of invigorating the country through talent development and help achieve scientific development by adjusting the growth pattern of the economy, Beijing University, together with Shanghai Foreign Service Company, has decided to produce the *2012 White Paper on China's Human Resources Service Industry*, the sixth annual white paper produced by the two parties under the guidance from the HR Market Department of the Ministry of Human Resources and Social Security. This book aims to analyze China's HR service industry and its development from theoretical as well as empirical perspectives. Through theoretical inductions, factual descriptions, statistics, case analysis and scientific forecasts, the book enables readers to gain a thorough understanding of the overall development, focus and latest progress of China's HR service industry, and grasp the development trend of China's HR service industry. In addition, it describes the major events and current development of China's HR service industry in 2012. Compared with the previous five white papers, the focuses of the *2012 White Paper on China's HR Service Industry* are the following:

First of all, it continues to pay attention to the latest changes and develop-

ment regarding social security. *The White Paper* offers a snapshot of the latest amendments to HR laws and regulations, and renders comments on the changes and features of major HR-service-related laws and regulations from the perspectives of social welfare and harmonious development, thus pointing out the new directions for HR service providers in their efforts to adapt themselves to the new changes.

Secondly, it places emphasis on the innovative development of the industry. The study updates and supplements the business modes of the HR service industry and shares the successful experiences of the industry by using examples of China's famous HR service providers. Furthermore, it presents a systematic and detailed analysis of the future development of China's HR service industry.

Thirdly, it pays attention to the brand development of the industry. Brand development has been a critical issue for China's HR service industry. From the perspective of the development of the whole HR service industry, we must pay attention to the brand development of HR service industry as it bears on the growth and expansion of the industry, and whether China's HR service providers can join the ranks of top HR service providers in the world.

Fourthly, it continues to focus on the major development trend of the industry. *The White Paper* presents a detailed list of key players in China's HR service industry, and summarizes the major research products and institutes of China's HR service industry. It reviews the major events for the HR service industry between June 2011 and June 2012 after collecting information from the Internet and newspapers. The top 10 events for China's HR service industry between June 2011 and June 2012 were selected on the basis of expert reviews and public surveys.

*The White Paper* consists of three parts. Part One is made up of four chapters. Chapter One introduces the latest policies and regulations for China's HR service industry, focusing on the analysis and interpretation of HR-service-related laws, regulations and policies that were promulgated in 2012, which will be of great reference value for governments, industries and researchers.

Chapter Two deals with the changing requirements for the HR service industry from the four perspectives of the adjustment of industrial structures, the coordinated development of regional economies, demands for HR services from organizations and individual employees. It elaborates an interactive relationship existing in the structural adjustment of the Chinese economy, the coordinated development of regional economies, development of organizations and individual professionals.

Chapter Three introduces latest changes to the HR service providers and their employees, including the basic information, status quo and changes of China's HR service providers, the composition of employees of the HR service providers and the latest changes to it, the management philosophies of the HR service industry and the latest development, presenting a thorough introduction to the overall development of China's HR service providers and their employees.

Chapter Four is mainly concerned with the future development of China's HR service industry. It introduces the business modes of China's HR service industry, and presents the fresh measures by China's leading HR service providers and HR management firms. It proposes that China's HR service providers should promote innovation from five fronts: the value creation of HR outsourcing service, the innovation of their products and service portfolios, the innovation in their management systems for service qualities, and the innovation in the training and development of the professionals for the industry.

Part Two contains special reports on the HR service industry. It consists of three chapters. Chapter One introduces the business segments of the HR service industry, which includes recruitment, labor dispatch, payroll outsourcing, flexible benefits, employee health services, training, HR management consulting and BPO services. It analyses the current development, business values and core competitiveness of these segments, and introduces the representative enterprises in these specific segments, with an aim to promote the development of China's HR service industry by spreading their experiences.

Chapter Two elaborates the values, significance and urgency of brand build-

ing for China's HR service industry. It analyses the problems existing in the current state of brand researches and development in China's HR service industry, and puts forward the pertinent suggestions and solutions to the brand development of China's HR service industry by referring to the experiences of brand development in other industries.

Chapter Three reviews the top 10 events in China's HR service industry, which were selected among the major events of China's HR service industry between June 2011 and June 2012.

Part Three contains the detailed lists of China's HR service providers, HR service research institutes as well as a bibliography of the research attainments on China's HR service industry.

Chief editors of *the 2012 White Paper* are Professor Xiao Mingzheng, head of the Center for HR Development and Management Research of Peking University, and Madame Guo Lijuan, Vice President of Donghao Group and Party Secretary and Chairwoman of Shanghai Foreign Service Company. Deputy chief editors are Mr. Ge Ping, General Manager of Shanghai Foreign Service Company, Mr. Gong Xianghe, Deputy Party Secretary of Shanghai Foreign Service Company, and Mr. Xiao Qun, Vice Director of the Department of Social Sciences of Peking University. Members of the editor's panel are Yang He, Yu Hongjun, Li Qiang, Zhou Yueming, Liu Bo, Zhou Zhiren, Zhu Tianbiao, Zhang Xianmin, Zhu Qingyang, Liu Hongjie, Xu Jianchang, Chen Jieping and Luo Xiangjun.

The following people were involved in the writing of the first part of the White Paper: Mei Jixia, Zhang Man, Zhao Yuan, Zhu Hongxuan, Li Jiang, Wang Minmin, Luo Xiangjun, Lü Hui, Zhou Yanqing, etc. The following people participated in the writing of the second part of the white paper: Wu Xinhui, Bu Xinghui, Wu Xiaoxue, Luo Xiangjun, Lü Hui, Ding Haozhou, Zhou Yanjing, Yan Dong, etc. The third part of the white paper was compiled by Su Meidong and Li Huijing. Chen Yangling and Huang Bingyuan were responsible for the translation of the foreword, the English table of contents and abstracts. Xing Kaixuan and Bu Xinghui, Luo Xiangjun, Lu Hui, Zhou Yanjing, offered assistance to Chief Editors

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The rise of a nation and the prosperity of a country lie on the development of its talents.The HR service industry shoulders the historical mission of boosting the performance of talents and propelling the course of rejuvenating the country, and it also plays a key role in helping China realize its strategic restructuring of the economy,and push forward sustainable development.China now enters a key period in its economic and social development.The HR service industry should grow rapidly and make its contributions to the further implementation of scientific development strategy and the glorious rejuvenation of the Chinese people.Sticking to the principles of reflecting the facts,revealing systemic laws,propelling the development of the industry and exploring the development trends,we hope the 2012 White Paper on China's HR Service Industry will play an important role in promoting the economic restructuring,achieving scientific development and the rejuvenation of our motherland on the back of talent development.

Editors-in-Chief of *The 2012 White Paper on China's HR Service Industry*

November 6,2012

## 目 录

前言 .....	( 1 )
----------	-------

## 第一部分 年度报告篇

第 1 章 人力资源服务主要政策法规及其新变化 .....	( 3 )
-------------------------------	-------

【内容摘要】 .....	( 3 )
--------------	-------

【Abstract】 .....	( 4 )
------------------	-------

一、劳动合同法修正案 .....	( 6 )
------------------	-------

二、《促进就业规划(2011—2015 年)》 .....	( 13 )
-------------------------------	--------

三、《女职工劳动保护特别规定》相关思想解读 .....	( 16 )
-----------------------------	--------

四、《在中国境内就业的外国人参加社会保险暂行办法》 相关思想解读 .....	( 20 )
---	--------

五、《企业劳动争议协商调解规定》相关思想解读 .....	( 24 )
------------------------------	--------

六、上海市规范劳务派遣用工方式政策 .....	( 28 )
-------------------------	--------

七、个税递延型养老保险有望于 2013 年试行 .....	( 30 )
-------------------------------	--------

第 2 章 人力资源服务需求及其新变化 .....	( 34 )
---------------------------	--------

【内容摘要】 .....	( 34 )
--------------	--------

【Abstract】 .....	( 35 )
------------------	--------

一、国家产业结构调整及其人力资源服务需求的变化 .....	( 36 )
-------------------------------	--------

二、区域经济协调发展及其人力资源服务需求的变化 .....	( 45 )
-------------------------------	--------

三、组织发展及其人力资源服务需求的变化 .....	( 48 )
---------------------------	--------

四、个体人力资源服务需求的变化 .....	( 59 )
-----------------------	--------

第3章 人力资源服务机构与人员及其新变化 .....	(71)
【内容摘要】 .....	(71)
【Abstract】 .....	(72)
一、人力资源服务机构概况 .....	(73)
二、人力资源服务机构现状及其变化分析 .....	(76)
三、人力资源服务机构从业人员及其变化分析 .....	(83)
四、人力资源服务机构经营理念及其变化分析 .....	(99)
第4章 人力资源服务业情况分析与发展 .....	(111)
【内容摘要】 .....	(111)
【Abstract】 .....	(112)
一、人力资源服务业的业态分析 .....	(113)
二、我国人力资源服务与管理的经验介绍 .....	(121)
三、中国人力资源服务业发展趋势分析 .....	(139)
四、推进人力资源服务行业创新发展思路 .....	(143)

## 第二部分 专题报告篇

第1章 人力资源服务细分行业研究 .....	(149)
【内容摘要】 .....	(149)
【Abstract】 .....	(150)
一、招聘服务的现状与发展 .....	(151)
二、劳务派遣服务的现状与发展 .....	(157)
三、薪酬外包服务的现状与发展 .....	(160)
四、企业员工健康服务的现状与发展 .....	(164)
五、培训服务的现状与发展 .....	(168)
六、弹性福利服务的现状与发展 .....	(172)
七、人力资源管理咨询服务的现状与发展 .....	(176)
八、BPO 服务行业运营和情况分析 .....	(181)



第2章 人力资源服务行业品牌发展与研究 .....	(185)
【内容摘要】 .....	(185)
【Abstract】 .....	(186)
一、人力资源服务业品牌建设的紧迫性、价值与意义 .....	(187)
二、人力资源服务业品牌建设研究的现状与问题 .....	(190)
三、其他行业品牌建设的经验与启示 .....	(193)
第3章 2011—2012年促进人力资源服务业发展十大事件 .....	(197)
【内容摘要】 .....	(197)
【Abstract】 .....	(198)
一、行业大事件评选概述 .....	(200)
二、十大行业事件及评述 .....	(203)
参考文献 .....	(214)
附录一 部分人力资源服务机构名录 .....	(220)
附录二 部分人力资源服务研究机构与研究成果名录 .....	(245)
附录三 其他相关信息 .....	(254)
知识产权声明 .....	(254)
《中国人力资源服务业白皮书》官方网站 .....	(254)
主编单位联系信息 .....	(254)