

中国人力资源服务业

白皮书

2011

White Paper for Human
Resources Service
Industry in China

萧鸣政 郭丽娟◎主 编
严裕民 葛 平 龚祥和 萧 群◎副主编



 人民教育出版社

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责任编辑:李媛媛

封面设计:肖 辉

版式设计:陈 岩

责任校对:吕 飞

图书在版编目(CIP)数据

中国人力资源服务业白皮书 2011/萧鸣政 郭丽娟 主编.

—北京:人民出版社,2012.2

ISBN 978-7-01-010684-7

I. ①中… II. ①萧…②郭… III. ①劳动力资源-服务业-白皮书-中国-2011 IV. ①F249.23

中国版本图书馆 CIP 数据核字(2012)第 0222715 号

中国人力资源服务业白皮书 2011

ZHONGGUO RENLI ZIYUAN FUWUYE BAIPISHU 2011

萧鸣政 郭丽娟 主编

人民出版社 出版发行

(100706 北京朝阳门内大街 166 号)

北京瑞古冠中印刷厂印刷 新华书店经销

2012 年 2 月第 1 版 2012 年 2 月北京第 1 次印刷

开本:710 毫米×1000 毫米 1/16 印张:24

字数:356 千字 印数:0,001-3,000 册

ISBN 978-7-01-010684-7 定价:50.00 元

邮购地址 100706 北京朝阳门内大街 166 号

人民东方图书销售中心 电话 (010)65250042 65289539

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前 言

2011年,是一个具有特殊意义的年份,在这一年里,伟大的中国共产党迎来了90周岁的生日,辛亥革命迎来了100周年。胡锦涛总书记在建党90周年大会上深刻指出:“人才是第一资源,是国家发展的战略资源。”在庆祝清华大学建校100周年大会上,胡锦涛总书记着重强调:“当今世界正处在大发展大变革大调整时期。世界多极化、经济全球化深入发展,世界经济格局发生新变化,综合国力竞争和各种力量较量更趋激烈,世界范围内生产力、生产方式、生活方式、经济社会发展格局正在发生深刻变革。特别是创新成为经济社会发展的主要驱动力,知识创新成为国家竞争力的核心要素。在这种大背景下,各国为掌握国际竞争主动,纷纷把深度开发人力资源、实现创新驱动发展作为战略选择。”

2011年,我国国民经济和社会发展正式迈入“十二五”开局之年,转变经济增长方式、实现科学发展成为全国人民的共识。在“十二五”规划纲要中,我国明确提出要把加快现代服务业的发展作为经济结构战略性调整的主攻方向,为人力资源服务业提供了广阔的市场空间和坚实的政策保障。

作为现代服务业的重要组成部分,人力资源服务业担负着为人才效能的充分发挥提供重要保证的重任。2010年6月,我国颁布的第一个国家中长期人才发展规划纲要中,提出了未来十年我国人才发展的总体目标,确立了坚持“服务发展、人才优先、以用为本、创新机制、高端引领、整体开发”的方针,为人力资源服务业的发展提供了明确的方向。人力资源服务业通过提供专业化的服务和支撑,为各类型组织的有序管理和业务发展提供了战略和操作层面的有力保障。从中国人力资源服务业的发展现状来看,市场规模和专业化程度在迅速提升,并且已经形成了具有影响力的品牌和企业。人力资源服务业所提供的人才派遣、招聘、培训、薪酬服务、福利服务以及绩效管理、岗位测评、战略设计等管理咨询业务,得到了大部分企业和各类组

织的认可和肯定,使人才效能得到了充分发挥,人才充分服务于社会发展,同时也大大地提升了组织绩效和管理水平。

为了继续深入贯彻落实《国家人才发展中长期规划纲要(2010—2020年)》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,继2007、2008、2009、2010年后,北京大学人力资源开发与管理研究中心和上海市对外服务有限公司继续联合人民出版社推出《中国人力资源服务业白皮书2011》,本书力争从实践和理论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,使读者全面了解中国人力资源服务业的发展现状、重点领域和最新进展,科学预测人力资源服务业的未来方向,系统展现2011年中国人力资源服务业的重大事件和发展概况。与前四年的《白皮书》相比,《中国人力资源服务业白皮书2011》无论是架构还是内容,都有了比较大的调整与变化。主要体现在以下几个方面:

第一,关注系统层面的变化与发展。白皮书着重从国家产业结构的调整、区域经济的协调发展、组织和个体等层面分析我国宏观和微观环境的发展现状,面临的挑战以及对于人力资源服务业的需求,系统阐述我国人力资源服务业发展的方向和需要重点关注的领域。

第二,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调整,着重从关注民生以及和谐发展的角度分析在人力资源服务业领域主要法规和政策的新变化和新特点,从而为人力资源服务机构适应新变化求得新发展指明了方向。

第三,关注热点领域的方向性探索。白皮书以专门的篇章阐述了影响人力资源服务业未来走向的重点课题,对于业界普遍热议的政策改革、劳务派遣、产业发展、人力资源服务业的税收政策思考等问题展现了部分专家的观点,同时对于国内外人力资源服务机构商业模式的变化进行了较为详尽的比较研究。

第四,关注行业发展的重大走向。白皮书对于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。在专家评价和公众参与的基础上,

全面梳理并评选出了2007—2011年促进人力资源服务业发展的十大事件。

白皮书共分为三个部分:第一部分为年度报告篇,第二部分为专题报告篇,第三部分为附录。

第一部分共分为四章。第一章全面介绍了2011年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,着重从国家中长期人才规划和人才强国的背景出发,强调中国人力资源服务业的发展应当保持与政策法规的一致性,以及对于人才发展的基础性支撑作用。

第二章主要关注人力资源服务业发展的内外部市场需求。系统阐述了国家产业结构的调整、区域经济协调发展、组织和个体发展对于人力资源服务业的需求,提出国家产业结构的调整能够有效地带动人才结构的提升和人才服务业的提升,区域经济的协调发展能够有效地促进人才的合理流动和效能发挥,组织的生存和发展能够有效地拓展人力资源的需求,而个体人力资源的需求让人力资源服务业的发展有着坚实的基础。

第三章主要介绍人力资源服务机构和从业人员的新变化,包括三个部分:一是我国人力资源服务机构的发展及其新变化,二是人力资源服务业的从业人员具体构成及其新变化,三是我国人力资源服务业的管理理念及其最新变化,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整体发展情况和新发展,包括五个层面:一是人力资源服务业的业态情况分析,二是人力资源服务业的效果评价分析,三是人力资源服务业的研究与活动分析,四是人力资源服务业的经验和典型案例分析,五是通过系统分析对中国人力资源服务业的发展走向的预测。

第二部分为专题报告篇,共分为六章。第一章是对人力资源服务产业的发展思考,以专家约稿的形式选取人力资源服务业发展的重点领域进行系统性分析。主要包括关于人力资源服务业的政策改革、关于劳务派遣的适用性分析、关于人力资源服务业税收的改革以及关于发展现代人力资源服务业的思考等课题。

第二章聚焦于国内外人力资源服务企业商业模式的比较研究。通过比较典型的国内外人力资源服务企业在招聘服务、派遣服务、薪酬服务、健康

管理服务、培训服务、弹性福利服务、管理咨询服务和 BPO 服务等方面的主要功能和异同点,展现了中国人力资源服务业发展的方向和可借鉴的先进经验。

第三章主要关注人力资源服务业对于大学生就业的促进作用。通过实证性数据汇总和分析,全面展现了 2011 年中国大学生的就业选择特点,对于大学生就业的发展趋势和规律进行了相对全面的预测,并从政策措施、服务保障、发展变革和大学生就业能力提高等多个方面提出了对促进大学生就业的建议。

第四章对薪酬状况进行了调查与分析。通过选取上海市咨询/服务、通讯(信)、仪器仪表、计算机、机械、商业、交通运输、教育/文化艺术、纺织/服装九个行业的数据,旨在帮助企业了解上海地区相关行业特别是外资企业的平均薪酬水平及用人成本,提供了一份具有高度实际参考价值的薪酬分析报告。

第五章是展示人力资源服务业中的新兴服务业务——企业人力资源审计服务。系统地介绍了人力资源审计产生的背景和发展的过程,分析了我国人力资源审计服务存在的不足,通过经典审计案例的分享,对我国人力资源审计的规范和管理提升提出了实用性的建议。

第六章是 2007—2011 年期间促进中国人力资源服务业发展的十大事件。

附录部分,在以往四年《白皮书》附录的基础上,整理了一些人力资源服务机构名录,增加了部分人力资源服务的研究机构和研究成果的名录。

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原总经理严裕民先生(现东浩集团工会主席)、上海市对外服务有限公司常务副总经理葛平先生、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、罗湘军担任编辑委员会委员。

李江、汪敏敏、罗湘军、田雨、吕卉、周妍菁、张满、步星辉、张轩、赵源、葛连高等同志参加了第一部分的编写工作;来有为、赵乃真、韩树杰、唐鑽、邢

凯旋、步星辉、张如国、张满、吴晓雪、罗湘军、朱铭、翟惟清、田雨、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；肖志康、黄雪芬、郁焱等同志参加了附录部分的编写工作；陈养铃、黄冰源等同志参加了本书相关的英文翻译工作；罗湘军、邢凯旋、田雨、周妍菁、张满、步星辉同志协助萧鸣政、郭丽娟等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、邢凯旋、田雨、周妍菁同志负责项目综合协调工作。此外，朱虹璇等同志也参与了项目的调研工作。

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、杨文财处长、田小宝、陈军、赵乃真等领导的大力支持与指导，感谢王通讯、潘金云、袁伦藻、唐镛等专家对于本书提出的宝贵建议，感谢相关专家、学者热情帮助和积极支持。

人才兴则民族兴，人才强则国家强。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做出应有的贡献。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 2011》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 2011》主编

2011年11月16日

Foreword

The year 2011 is particularly special because it marks the 90th anniversary of the Communist Party of China and the 100th anniversary of the Xinhai Revolution. “Talent is the most important resource and a strategic resource for a country’s development”, Chinese President Hu Jintao said at a grand gathering marking the 90th founding anniversary of the CPC. At the centennial celebration in Tsinghua University, President Hu Jintao stressed that “the world today is undergoing huge development, transformation and adjustment. With the development of world multi-polarization and economic globalization, the economic landscape of the world is experiencing dramatic changes. Competition in overall national strength and the wrestling among various powers will be more intense. The productivity, production methods, ways of life, economic and social development patterns are undergoing tremendous transformations. Knowledge innovation has emerged as a core factor determining national competitiveness, particularly when innovation has come to be the main driver of economic and social development. Under the current conditions, countries in the world have taken giant measures to develop human resources and made innovation-based development their strategic choice in order to gain the upper hand in international competition.”

The year 2011 marks the beginning of the 12th Five-year Plan for China’s national economy and social development. The Chinese people have reached a consensus to change the country’s economic growth patterns and achieve a scientific development. The outline of the 12th Five-Year Plan clearly points out that China should focus on the development of its modern service sectors in its strategic restructuring of the economy, which provides vast market space and firm policy support for the development of the human resources service sector.

As a key component of the modern service trades, the HR service industry shoulders the responsibility for ensuring the full development of human resources. In June 2010, a paper titled China's Medium-and-Long-Term Talent Development Plan was released, which pointed out the roadmap for the development of China's HR service industry by outlining the overall goal of China's talent development in the upcoming decade as well as the guidelines of "developing the service industry, giving priority to talents, adopting a need-based plan for talent development, fostering an innovation mechanism, cultivating high-end talents first, and achieving overall development". The Human Resources service sector can offer strong strategic and operational support for the orderly management and business development of various types of organizations through its professional services and supportive measures. The current development of China's HR service industry features the rapid expansion of the market and the quick improvement in its professional services. As such, a number of powerful brands and companies have emerged in the Chinese market. China's HR service industry offers basic services such as talent dispatchment, recruitment, training, payroll services, benefits services as well as management consulting services such as performance management, job assessment, and strategic design. These services have won recognition from most of the companies and organizations, as they enable the full development of talents to serve the societal development and help improve the organizational performance and management quality of enterprises.

The Centre for Human Resource Development and Manager Research of Beijing University, together with Shanghai Foreign Service Company and People's Publishing House, are producing the *2011 White Paper on China's Human Resources Service Industry*. The purpose of the paper is to further implement China's medium and long-term talent development plan (2010 – 2020), carry out 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. The three parties, in the past, also jointly issued the 2007, 2008, 2009 and 2010 white papers on the human resources industry, and all these projects were undertaken with guidance from the HR Market Office of the Ministry of Human Resources and Social Security. This book aims to analyse 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 and most recent progress in China's HR service industry, as well as an insight into the development trend in China's HR service industry. In addition, it describes the major events and developments which took place in 2010 in China's HR service industry. In comparison with the previous four annual reports, the *2011 White Paper on China's HR Service Industry* has made substantial adjustment and changes in its organizational framework and contents, which are as follows:

Firstly, it depicts the overall changes and development in the whole system. The white paper analyses China's macro- and micro-environment, challenges faced. It also looks at demands for the HR service industry as a result of the adjustment of China's industrial structures and the coordinated development of regional economies, organizations and individual employees. It explains, in a systemic manner, the direction of development for China's HR service industry and key areas that merit attention.

Secondly, it focuses on the latest changes and new developments in social security policies in China. The white paper presents an all-encompassing summary of the amendments and revisions made to HR-related policies and regulations in the past year, placing emphasis on the analysis of these changes and features of major laws and policies governing the HR service industry. Special attention is given to looking at this from the perspective of how they impact on people's livelihoods and harmonious development, so pointing out the direction HR service providers should take in adapting to the latest changes.

Thirdly, it closely follows the hot issues of HR service industry. The white paper contains special chapters addressing the key research projects that will impact the future development of the HR service industry. Expert views on the hotly debated issues, such as changing policies, labour dispatch, sectoral development and taxation policy for the HR service industry are presented. In addition, the white paper offers a comparative study of the business modes of domestic and overseas HR service providers.

Fourthly, it highlights the major development trends in the HR service industry. The white paper presents part of the latest research on the HR service industry and introduces the most influential research institutes. Based on a poll of experts and a survey of public opinions, the white paper singled out 10 major events that boosted the development of the HR service industry between 2007 and 2011.

The white paper consists of three parts. Part one: Annual reports of the industry. Part two: Special reports and Part three is the appendix.

Part one is made up of four chapters. Chapter one introduces the latest policies and regulations for China's HR service industry in 2011, pointing out, in consideration of the China's Medium and Long-term Talent Development Plan and the country's strategy for rejuvenating the country through talent, that the development of the HR service industry should conform with the latest policies and regulations, offering fundamental support for the development of talent in China.

Chapter two deals with the external and internal market demand for the HR service industry. It describes the market demand for the HR service industry as a result of an adjustment in industrial structures, the coordinated development of regional economies, organizations and individual employees. It proposes that a structural adjustment of the Chinese economy will lead to an improvement in talent structures and the HR service sector, whereas the coordinated development of regional economies can stimulate the flow of talent and an improvement in performance. The survival and development of organizations can

effectively expand the demand for talent, whereas the demand of individual talent lays a solid foundation for the development of the HR service industry.

Chapter three introduces latest changes in the HR service providers and their employees, and consists of three sections. Section one touches upon the development and changes in China's HR service providers. Section two presents the composition of employees of the HR service providers and the latest changes to it. Section three looks at management philosophies in the HR service industry and latest developments, presenting a thorough introduction to the overall development of China's HR service providers and their employees.

Chapter four is mainly concerned with the overall development of China's HR service industry, and is comprised of five sections. Section one takes a look at the business modes in the HR service providers. Section two offers analyses of performance assessment in the HR service providers. Section three presents a review of HR service research. Section four introduces some experiences and typical case studies in the HR service industry. Section five offers a development forecast for China's HR service industry.

Part Two contains special reports on the HR service industry. It consists of six chapters. Chapter one presents expert views on the HR service industry. The invited experts offer systemic analysis of the key areas of development for the HR service industry. These key areas include changing policies on the HR service industry, the applicability analysis of labour dispatch, the taxation reform for China's HR service industry, and the development of a modern HR service industry.

Chapter two reviews comparative studies into the business modes for domestic and overseas HR service providers. It points out the direction needed for the development of China's HR service industry by comparing the main functions and differences of domestic and overseas HR service providers in recruitment, dispatching services, payroll services, healthcare management, training, flexible benefits services, management consulting and BPO services.

Chapter three focuses on the role of HR service providers in facilitating

college graduate employment. It presents some special features in the 2011 employment of Chinese college graduates through empirical data and analysis, making all-round prediction for the trend and patterns of college graduate employment. In addition, it offers recommendations for college graduate employment in ways of policies, supportive services, development trends and an improvement in the skills of college graduates.

Chapter four focuses on surveys and an analysis of compensation. Based on the salary data of nine sectors (including consulting/services, telecommunications, instruments and apparatus, computers, machinery, commerce, transportation, education/culture and arts, and textile/apparel in Shanghai) the survey aims to help companies get to know the average salary and HR cost for their sector, particularly those foreign-invested companies. It also offers an analysis of the salary survey, which will be of great reference value.

Chapter five presents an introduction to an emerging business in the HR service industry—the HR auditing services for companies. It offers a systemic introduction to the birth and development of the HR auditing service, and points out the weakness of China's HR auditing service. In addition, through looking at some case studies, it offers practical recommendations for the standardization and enhancement of management in HR auditing services in China.

Chapter six describes ten major events that boosted the development of China's HR service industry between 2007 and 2011.

The appendices, based on the appendices of previous annual reports, offer a partial list of HR service providers, and some of the research centres for human resource development as well as their latest researches.

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Li Jiang, Wang Minmin, Luo Xiangjun, Tian Yu, Lü Hui, Zhou Yanjing, Zhang Man, Bu Xinghui, Zhang Xuan, Zhao Yuan, and Ge Liangao took part in the writing of the first part of this white paper. Lai Youwei, Zhao Naizhen, Han Shujie, Tang Kuang, Xing Kaixuan, Bu Xinghui, Zhang Ruguo, Zhang Man, Wu Xiaoxue, Luo Xiangjun, Zhu Ming, Zhai Weiqing, Tian Yu, Lü Hui, Ding Haozhou, Zhou Yanjing and Yan Dong were involved in the writing of the second part. Xiao Zhikang, Huang Xuefen, and Yu Yan were involved in the writing of the appendices. Chen Yangling and Huang Bingyuan participated in the translation of this white paper. Luo Xiangjun, Xing Kaixuan, Tian Yu, Zhou Yanjing, Zhang Man and Bu Xinghui aided Professor Xiao Mingzheng and Madame Guo Lijuan in compiling and editing the whole paper. Qin Lifang, Kang Lei and Ao Man were in charge of the construction and management of the official website of this white paper. Luo Xiangjun, Xiao Xiaoping, Xing Kaixuan, Tian Yu and Zhou Yanjing were responsible for the coordination of the whole project. In addition, Zhu Hongxuan participated in the field study of this project.

Special thanks go to related departments of China's Ministry of Human Resources and Social Security and their leaders for their support and guidance, particularly Director-General Bi Xuerong, Director Yang Wencai, and other officials including Tian Xiaobao, Chen Jun and Zhao Naizhen. We are also indebted to many experts, including Wang Tongxun, Pan Jinrun, Yuan Lunqu, and Tang Kuang, for their valuable suggestions. We are grateful to related experts and scholars for their help and support.

The prosperity of a people and country lies in the development of its talent.

The HR service industry shoulders the historical mission of boosting the performance of talent and propelling the course of rejuvenating the country. It also plays a key role in helping China realize its strategic restructuring of the economy, and pushing forward a 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 further implement a scientific development philosophy and the “glorious rejuvenation” of the Chinese people. By reflecting on the facts, revealing systemic rules, development of the industry and exploring development trends, we hope the 2011 *White Paper on China’s HR Service Industry* will play an important role in promoting economic restructuring, achieving scientific development and rejuvenating the motherland through talent development.

Editors-in-Chief of *The 2011 White Paper on China’s HR Service Industry*
Nov. 16, 2011