

中国人力资源服务业

白皮书 2010

White Paper for Human
Resources Service
Industry in China

萧鸣政 郭丽娟 顾家栋◎主 编
严裕民 龚祥和 邱 建 萧 群◎副主编



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前 言

2010 年是继往开来的一年,是我国社会经济发展“十一五”规划的最后一年,机遇与挑战同在,困难与喜悦俱有。一方面,在全球经济增长放缓的背景下,人力资源服务的市场整体需求增速减缓,部分企业在人力资源服务方面的预算迅速收紧,使成长中的中国人力资源服务业面临着前所未有的挑战。另一方面,国家正着手制定“十二五”规划,在“十二五”规划概要中,现代服务业的发展依旧是产业结构调整过程中的重点,为人力资源服务业的发展提供了巨大的市场空间及政策支持。政府通过实施积极的产业政策,带动产业结构调整,促进科技水平提升,增加人才市场需求,使中国的人力资源服务业面临着无限的市场机遇。

尤其是 2010 年 6 月,我国颁布了新中国成立后第一个国家中长期人才发展规划纲要。纲要提出了未来十年我国人才发展的总目标,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。在科学人才观不断确立,高层次、高技能人才队伍不断壮大的前提下,人力资源服务业将担负着为人才效能的充分发挥提供重要保证的重任。人力资源服务业将通过提供人才派遣、招聘、培训、管理咨询等服务,使人才充分服务于社会发展,通过提供薪酬管理、绩效管理使人才的使用得到重要保障。

为了配合《国家人才发展中长期规划纲要(2010—2020 年)》的有效贯彻与认真落实胡锦涛总书记在亚太经合组织人力资源开发部长会议上关于优先开发人力资源、加快形成人力资源优先发展的战略布局、优先调整人力资源结构、优先投资人力资源开发、创新人力资源制度的讲话精神,进一步推动人才强国战略在人力资源服务业领域中的深入实施,继 2007、2008、2009 年后,北京大学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 2010》。我们秉承推动中国人力资源服务业更好更快发展的宗旨,对中国人力资源服务业的发展状况进行了系统梳理,

全面剖析了人力资源服务业的市场需求状况及产业发展的新趋势,对于产业服务理念及从业状况做了详细的阐述。《中国人力资源服务业白皮书 2010》关注点主要体现在以下几个方面:

其一,关注服务对象的发展。从政府、区域、组织和个人四个层面对人力资源服务的需求进行了深入的分析,并形成了大学生就业分析专题报告。全面呈现了过去一年大学生的就业趋势、求职情况以及就业指导、自主创业等情况,并针对大学生在外企的就业展开了第一手调查,为政府政策的调整、人力资源服务业的服务项目的选择提供了新信息。

其二,关注服务环境的调整。既从法律层面上全面把握了过去一年人力资源相关的政策、法规的调整;又从跨文化的层面分析了在经济一体化的背景下,人力资源服务业如何更好地融入东道国的环境,以适应客户的需求。

其三,关注产业竞争力的提升。从产业服务理念的转变到员工分布,分析本土人力资源服务业存在的不足,及竞争者的情况,全新构建了中国人力资源服务业的概况,并针对产业总体的发展提供了相关预测。

其四,关注内容创新。2010年的白皮书既保持了2009年的总体结构,又在内容上进行了创新。具体内容结构介绍如下:

第一部分是年度报告篇,包括四章。

第一章系统介绍了人力资源服务业面临的政策法规的变化,在国家中长期人才规划的指引下,人力资源服务业应注重国家的人才发展的导向,并全面把握人力资源相关的政策法规。

第二章从产业结构、区域经济协调发展、组织及个体人力资源需求四个层面对人力资源服务的需求及其新变化进行了分析。产业结构调整带动人才结构提升;区域经济发展带动人才需求增加;而为了组织的生存与发展,对人力资源产生新的需求;由此形成了个体对人力资源服务求职、流动、培训、保障与职业发展方面的需求。

第三章介绍人力资源服务机构及从业人员的变化。主要包括我国人力资源服务机构服务理念的变化,及新的一年中服务业的从业人员具体的变化,全面展示了过去一年我国人力资源服务机构整体的情况。

第四章以上海外服、中兴通讯、金蝶软件、翰威特咨询、前程无忧等不同

领域的知名企业作为我国人力资源服务业的代表,并根据人力资源服务业在实践中情况与经验,分析了人力资源服务业的新发展。

第二部分为专题报告篇,包括五章。

第一章对部分人力资源服务企业进行了调查,并针对人力资源派遣、猎头、网络招聘、专业测评、培训开发、流程外包、管理咨询、E—HR 等八大领域,介绍了相关企业的情况。旨在帮助读者更为清晰、更为直观地了解中国人力资源服务业的情况,把握产业发展的整体趋势和水平。

第二章进一步预测了人力资源服务产业的走向,指出信息化、品牌化、产业化是中国人力资源服务业的发展趋势。

第三章全面分析我国大学生过去一年的求职、就业指导、自主创业的情况,并针对大学生在外企的就业情况进行了一手调查,在未来发展过程中,获得政府支持、加强就业指导、鼓励自主创业、构建就业环境将成为大学生就业的保障。

第四章主要介绍了在全球化背景下,跨文化人力资源管理对人力资源服务业的促进、跨文化人力资源服务的工作重点、问题分析以及困惑与对策,并详细介绍了上海外服促进外派成功的建议。

第五章介绍了我国薪酬发展的总体趋势,对企业内部不同层级、不同岗位、地区之间、行业之间薪酬进行了分析,提出要充分发挥薪酬回报在吸引、保留和激励员工方面的效应,构建符合企业和个人利益相融合的激励薪酬体系。

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世博集团副总裁、上海市对外服务有限公司党委书记、董事长郭丽娟女士,上海市对外服务有限公司高级顾问顾家栋先生担任。上海市对外服务有限公司总经理严裕民先生、党委副书记龚祥和先生、调研员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,杨河、李成言、徐湘林、程郁缀、周岳明、刘波、陈巍、张宪民、葛平、朱庆阳、吴志民担任编辑委员会委员。

双方参加编写及项目工作的主要人员包括:李江、汪敏敏、杨平、郁焱、罗湘军、吕卉、李鑫等同志参加了第一部分的编写工作;张轩、张异凡、罗湘军、吕卉、葛连高、金志峰、庄欢、薛慰慈、田佳婉等同志参加了第二部分的编

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;金志峰、邢凯旋、步星辉、张满同志参加了全书统稿工作。康磊、徐华、敖曼、徐昕瑜同志负责官方网站的建设及管理工作;周瑾、马化麟、庄欢同志负责宣传工作;金志峰、田雨同志负责各章节整合与协助统稿工作。此外,许国华、韩晓东、陈菁、肖志康等同志也参与了项目有关工作。

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,感谢顾家栋先生、赵履宽教授、田小宝院长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,人才强则国家强。在中国经济发展的攻坚阶段,在深入贯彻落实科学发展观与推进政治、经济、文化、社会和生态文明建设的 key 期,亟须建设中国特色社会主义各类人才的积极工作与贡献,更需要人力资源服务业对于人才发展与人才队伍建设的精心服务与促进。我们仍然奉行客观反映、系统揭示、积极推动的宗旨,希望《中国人力资源服务业白皮书 2010》能够对人才强国战略与国家中长期人才发展规划纲要的实施起到一定的推动与促进作用。

《中国人力资源服务业白皮书 2010》主编

2010 年 11 月 10 日

Foreword

Year 2010 is an important transitional year as it is the concluding year of the 11th five-year plan for the development of the Chinese economy . It has witnessed both opportunities and challenges, bringing us difficulties as well as joys. On one hand, market demands for HR services have been slowing down against the backdrop of the mild growth of the world economy, creating unprecedented challenges for the Chinese HR service industry as some companies have cut their budgets for human resources. On the other hand, China has started to formulate its 12th five-year plan. According to the outline of the 12th five-year plan, the development of modern service industries still remains one of the top priorities in the country's ongoing adjustment of industrial structures, offering strong policy support for the growth of the HR service market. The Chinese government has adopted proactive industrial policies to boost the ongoing industrial restructuring, enhance its scientific and technological capabilities and ramp up market demands for talents, which will bring boundless opportunities to China's HR service industry.

Particularly, the Chinese government released the first-ever medium-and-long-term talent development plan in June 2010. The plan set forth China's overall objective for talent development in the upcoming decade, outlining the following guiding policies for talent development: giving priorities to the development of service industries and the cultivation of talents, making better use of talents, putting in place an innovative scheme to foster the development of human resources, attracting high-calibre talents first, and balancing development of the whole sector. China's HR service industry shoulders the important responsibility of ensuring better performance of all the talents following the establishment of a scientific talent view in China and the ever-expanding pool

of high-calibre talents and multi-skilled technicians. Through offering services such as employee dispatch, recruitment, training and management consulting, the HR services industry can help talents better align with social development, and through compensation management and performance management, it helps ensure proper use of talents in China.

In order to better implement *The Medium and Long-term National Talent Development Program* (2010—2020) and carry out the speech delivered by Chinese President Hu Jintao at the 5th APEC Human Resources Development Ministerial Meeting, at which he urged that China should give priority to human resources development, hammer out strategies to boost HR development, focus on readjusting the structures of human resources and investing in human resources development, and make institutional innovations in human resources development, and put into practice the strategy of invigorating China through human resources in the HR services industry, Peking University and SFSC, in collaboration with the People's Publishing House, decided to publish the *2010 White Paper on China's Human Resource Service Industry* after the successful publications of HR white papers in 2007, 2008 and 2009. With a mission to facilitate a better and faster development of China's HR service industry, the *2010 White Paper on China's Human Resource Service Industry* takes a careful look at the development of China's HR service industry, offering an all-round analysis of the market demands and the outlook for the HR service industry in China, and presenting a detailed description of the service philosophies and employees of the HR service sector. Below are the highlights of the *2010 White Paper on China's Human Resource Service Industry*.

First of all, it focuses on the development of the targeted customers of the HR service industry. The *2010 White Paper* offers detailed analysis of the market demands for HR services from the perspective of the four categories of customers, which are governments, regions, organizations and individual employees. In addition, it presents a special report on college graduate employment, covering the overall trend for college graduate employment over the

past year, in addition to a specific analysis of their job applications, career guidance services and self-employment. A first-hand survey of college graduates working in foreign-invested companies is also supplied, offering new information for the possible adjustment of government policies and the mix of service items at HR service providers.

Secondly, it focuses on the changing environment for the human resources service industry. The *2010 White Paper* not only offers an analysis of the changes to the laws and regulations related to the HR service industry, but also presents a study of how the human resource service industry can better meet the needs of customers by adapting quickly to the working environment of the host country from the perspective of cross-cultural communications against the backdrop of economic globalization.

Thirdly, it focuses on the improvement of industrial competitiveness. Starting from the transformation of service philosophies to the distribution of employees, the *2010 White Paper* analyses the weakness of domestic HR service providers and the development of their overseas rivals, offering a brand-new overview of China's human resources service industry and predictions of the overall development of the industry.

Fourthly, the *2010 White Paper* has basically followed the same structure as that of the *2009 White Paper*, but is nonetheless quite innovative in its contents. The *2010 White Paper* consists of two parts.

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

Chapter One offers a detailed overview of the changes to the existing laws and regulations related to the development of China's HR service industry. The whole sector should follow the guidance given in the medium-and-long-term talent development plan of the country, paying attention to the orientation of the country's talent development program and understanding the laws and regulations related to the HR service industry.

Chapter Two offers detailed analysis of the market demands for HR services

from the perspective of the four categories of customers, which are governments, regions, organizations and individual employees, and the latest changes. Industrial restructuring leads to the upgrading of human resources structure. The development of regional economy will spur demands for talents. The survival and development of organizations also create new demands for human resources. All these factors give rise to the demands of HR services on the part of individual employees, including job applications, cross-regional movement of talents, social security and career development services.

Chapter Three introduces changes in HR service providers in China and their employees, mainly including the changes of service philosophies of the HR service providers and specific changes that happened to the employees in this sector. In a word, it presents an all-around overview of China's HR service providers for the past year.

Chapter Four analyses the latest development of China's HR service industry in line with the practical situations and experiences of the HR service industry in China and based on the studies of a number of well-known HR service firms such as SFSC, ZTE, Kingdee Software, Hewitt, and 51Job.

Part Two is made up of a number of special reports, which can be divided into five chapters.

Chapter One introduces a survey of some HR service providers and describes these firms from eight specialized HR services of personnel dispatch, executive search, online recruitment, professional assessment, training and development, BPO, management consulting and E-HR. It aims to offer a clear-cut and sensible introduction to China's HR service providers for the readers, helping them grasp the overall development trend and status quo of China's HR service industry.

Chapter Two presents a further forecast on China's HR service industry, pointing out that the HR service industry will move towards informationization, brandization and industrialization.

Chapter Three is a special report on college graduate employment, covering

the overall trend for college graduate employment over the past year, and a specific analysis of their job applications, career guidance services and self-employment. In addition, a first-hand survey of college graduates working in foreign-invested companies is analysed. In the future, difficulties in employment for college graduates will be further alleviated with strengthened government support, career guidance services, more students opting to start up their own companies, and the construction of a better employment environment.

Chapter Four studies how cross-cultural HR management can facilitate the development of the HR service sector against the backdrop of globalization. It enumerates the key points for cross-cultural HR services, and offers analysis of major problems, puzzles and the solutions. In addition, it introduces the suggestions of Shanghai Foreign Service Company in successfully dispatching employees overseas.

Chapter Five describes the general trend for China's compensation levels, and compare remunerations between different levels of positions within the same company, among different positions, between different regions and across different sectors. It proposes that we should make better use of remuneration strategies to attract, retain and motivate employees, and eventually set up a compensation system that balances the interests of companies and individual employees.

Chief editors of the *2010 White Paper* are Professor Xiao Mingzheng, head of the Center for HR Development and Management Research of Peking University, Ms. Guo Lijuan, Chairwoman of SFSC, and senior advisor Mr. Gu Jiadong. Deputy Chief Editors are Mr. Yan Yuming, General Manager of SFSC, Mr. Gong Xianghe, Deputy Party Secretary of SFSC, Ms. Qiu Jian, consultant, and Mr. Xiao Qun, Vice Director of the Office of Humanities and Social Sciences of Peking University. Members of the editing committee include Yang He, Li Chengyan, Xu Xianglin, Cheng Yuzhui, Zhou Yueming, Liu Bo, Chen Wei, Zhang Xianmin, Ge Ping, Zhu Qingyang and Wu Zhimin.

The following people from Peking University and SFSC took part in the

writing and related projects of this white Paper: Li Jiang, Wang Minmin, Yang Ping, Yu Yan, Luo Xiangjun, Lü Hui, and Li Xin participated in the writing of Part One. Zhang Xuan, Zhang Yifan, Luo Xiangjun, Lü Hui, Ge Liangao, Jin Zhifeng, Zhuang Huan, Xue Weici and Tian Jiawan were involved in the writing of Part Two. Chen Yangling and Huang Binyuan were responsible for the translation of the foreword, table of contents and abstract of the white paper. Jin Zhifeng and Xing Kaixuan were in charge of the editing of the whole White Paper. Kang Lei, Xu Hua, Ao Man, and Xu Xinyu were responsible for the construction and maintenance of the official website. Zhou Jin, Ma Hualin and Zhuang Huan oversaw the publicity campaign. Jin Zhifeng and Tianyu assisted the chief editors in coordinating the balanced progress of this project. In addition, Xu Guohua, Han Xiaodong, Chen Jing and Xiao Zhikang were partly involved in the writing of this White Paper.

We would like to express our gratitude to related departments and officials from the Ministry of Human Resources and Social Security for their support and guidance. Special thanks go to Mr. Gu Jiadong, Professor Zhao Lükuan and Professor Tiao Xiaobao, who have offered valuable suggestions for this book. We are also indebted to experts and scholars from different industry associations for their support of the white paper.

A country will thrive and prosper if it is possessed of huge talent pools. China is now at an important stage of economic development, entering into a pivotal period in its drive to further implement the scientific development perspective and strengthen constructions of political, economic, cultural, social and ecological civilizations. It is in urgent need of all types of talents to push forward the grand dream of building up a socialist country with Chinese characteristics. Moreover, services and efforts from the HR service sector are also indispensable to the country's development because they play an important role in boosting talent development and building up strong talent teams. We have been committed as ever to the mission of reflecting and revealing the facts in a systemic way and playing a proactive role for the development of the HR service

sector, and we hope the publication of the *2010 White Paper on China's Human Resources Service Industry* will fuel and beef up efforts to further carry out China's strategy of invigorating itself through human resources and put into full practice of the policies described in China's medium-and-long-term talent development plan.

Editors-in-Chief of the *2010 White Paper on China's
HR Service Industry*
November 10, 2010

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