

THE CHANGING HR CLIMATE IN CHINA: HOW TO TACKLE TALENT SHORTAGE AND OTHER CHALLENGES

不断变化的中国人力资源环境：
如何解决人才短缺和其他挑战

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INTRODUCTION

Leveraging HR Transformation to Overcome China's Market Challenges

“Innovation distinguishes between a leader and a follower.”

Steve Jobs – co-founder of Apple Inc.

Innovation is a critical part of HR transformation and whilst China has made rapid progress towards becoming more innovative, there is still a long way to go. China is currently ranked 35th in the Global Innovation Index ratings, placing it far behind the likes of Japan, the US and the UK. As global competition drives HR transformation, innovative approaches are required from HR departments so to help their company remain competitive and overcome associated challenges.

To do this, HR departments need to grow beyond their purely administrative functions and fulfil a more strategic role to help foster a work environment that will attract and retain the kind of employees their business needs.

This report will explore two of the most pressing issues currently developing in China that HR must transform to overcome as it lends ongoing strategic support to its parent organisation.

介绍

人力资源转型的变脸

“领袖和跟风者的区别就在于创新”。

苹果公司联合创始人史蒂夫·乔布斯 (Steve Jobs)

创新是人力资源转型中很重要的一个组成部分，而中国在扩大创新方面取得飞速发展，但仍有很长的路要走。中国目前在全球创新指数中排名第35位，远远落后于日本、美国和英国等国家。由于全球竞争带动人力资源转型，人力资源部门需要采取创新方式，帮助公司保持竞争力，克服相关挑战。

为此，人力资源部门需要超越纯粹行政管理职能的范畴，发挥更多战略性的作用，帮助营造一种吸引并保留公司需要的一类员工的工作环境。

本报告将探讨目前在中国形成的两个最迫切的问题，人力资源部门必须转型克服这些难题，为其上级组织提供持续的战略支持。

CHALLENGE: CHINA'S WORKFORCE TALENT SHORTAGE

“Talent gaps are significant, numerous and they will become more acute. Organisations that fail to understand and address them will not be successful and may not survive. The time to address these gaps is now.”

Jonathan Lo – Associate Director Hong Kong Human Capital Leader, Deloitte Consulting

As many China-based companies set their sights on expansion – both locally and internationally – they inevitably have to contend with the challenge of hiring from an employment pool that is suffering an acute skills shortage. It is perhaps no surprise that as most major companies plan to create sustainable growth in new target markets, there is significant demand and competition to attract multilingual and culturally flexible professionals.

Unfortunately, despite a leap forward in educational progress, employers are continually facing a lack of talented professionals to fill key roles. From 1999 to 2013, China experienced a sevenfold increase in annual university graduates, from one million to seven million. Whilst this is an astounding rate of growth, demand continues to outstrip as only 1 in 10 people in the entire country hold a degree above post-secondary level.

Current projections suggest that unless China's educational system undergoes significant change, there will be an even more acute talent shortage for the country to face by the end of the decade at both a vocational and university level. To be exact, research suggests that by 2020, demand will outstrip supply by 16 million vocationally and 8 million at the university level.

挑战：中国的劳动力人才短缺

“人才缺口数量巨大，且形势日益尖锐。不了解并解决这种缺口，企业不会取得成功，也将无法生存。现在就要解决这种缺口。”

德勤咨询香港人力资本领袖部副董事Jonathan Lo

由于很多中国公司把目光投向扩张（本土和国际），他们不可避免地要应对从遭受技能严重短缺的就业库中招聘员工的挑战。因为大多数大公司计划在新目标市场实现可持续增长，吸引多语言和文化灵活的专业人士的需求巨大，竞争也非常激烈，这也许不足为奇。

不幸的是，尽管教育事业取得飞跃发展，但雇主依然面临担任主要职责的专业化人才不足的问题。从1999年到2013年，中国每年的大学毕业生翻了七倍，从一百万到七百万。尽管增长率惊人，但需求更高，因为全国10个人中只有1人拥有大专以上学历。

目前的预测表明，除非中国的教育制度经历重大变革，否则到这个十年末，中国面临的职业和大学层面的人才短缺问题将更加尖锐。准确的说，研究表明，到2020年，人才需求和供应缺口在职业层面为1600万人，在大学层面为800万人。



CHALLENGE: AN AGEING WORKFORCE CREATES GENERATIONAL ISSUES

“China ran into an ageing society and out of demographic dividend”

2013 Mercer Annual HR Conference – Transformation, on the Wings of Innovation

In addition to a growing talent shortage, China must also brace itself to manage the rising number of dependants (people younger than 15 or older than 64) compared to the working age population (16 – 63). At present, China's age dependency ratio is at 37% and will continue to climb according to research by the World Bank. This means that over time, those people in work are likely to have an increasing number of dependants relying on them, thereby putting pressure on their income and potentially their availability as well.

One way to manage this development will be the introduction of appropriate measures to make the company's compensation and benefits packages both fair and attractive to the priorities of employees with dependants – but as competitors seek to offer similar benefits, standard approaches to tackle this solution will not prove sufficient to attract and retain a skilled workforce.

挑战：劳动力老龄化形成世代问题

“中国遭遇人口老龄化社会问题，人口红利大势已去”

2013年美世人力资源年度会议-转型，插上创新的翅膀

除了人才缺口扩大之外，与劳动年龄人口（16-63岁）相比，中国也必须做好准备，控制不断上升的受养人数量（15岁以下、64岁以上的人）。世界银行的研究显示，目前中国的老年抚养率为37%，并且这一比率还将继续攀升。这意味着，随着时间的推移，依赖就业人口的受养人数量增加，因此使就业人口的收入面临压力，他们的可用性也可能面临压力。

控制这种事态发展的一种方式采取适当措施，使既公允，又具有吸引力的公司薪酬和福利方案成为有受养人员工的优先考虑事项，但是，由于竞争对手力求提供类似的福利，解决这一问题的标准模式将被证明不足以吸引并挽留技能娴熟的员工。

WHAT DOES THIS MEAN FOR HR DEPARTMENTS?

1. A strategically-minded HR partner needs to be fully cognizant of both these gradual but significant changes.
2. Companies wishing to expand ahead of their competitors will find themselves competing not just over the market itself, but over the skilled employees needed to expand the business.
3. The importance of the HR department to the company's bottom-line will become greater than ever.
4. A range of benefits beyond simple financial incentives will become essential to sustaining successful business operations, as these following pages will describe

这对人力资源部门意味着什么？

1. 具有战略思想的人力资源人员要充分认识到这些渐进但显著的变化。
2. 想要扩张超越竞争对手的企业会发现，他们不仅要在自身所处的市场展开竞争，也要在公司扩张所需的熟练员工方面展开竞争。
3. 人力资源部对公司净利润的重要性将变得比以往更重大。
4. 超出简单财务奖励范畴的大量福利将对保持成功业务运营的持续性非常重要，下文将详细说明 ...



STRATEGY: ENCOURAGING A HEALTHIER LIFESTYLE

“Corporate wellness cannot be treated as a band-aid, and you definitely won’t be able to find it in a fitness app. Engagement, motivation, support and strategy are the keys to a successful program. Preventable wellness is a complete lifestyle and behaviour change – and change takes time and commitment.”

Joshua Love – CEO, Kinema Fitness

Although many employees in China face a range of growing personal health issues that stem from unhealthy lifestyle choices (smoking, lack of exercise, office-related stress), a growing number of workers now realise the importance of healthcare benefits offered by their employer.

Outpatient and hospitalisation care is presently considered as “basic” coverage and is provided by 9 out of 10 Chinese companies. However, 1 in 4 companies go one step further and provide their employees with the option to invest in voluntary health insurance programs. The average employee in China is developing a long-term view about the state of their health, although cost containment remains their chief concern. Research also suggests that this is an issue of equal importance to both young and older employees.

战略：鼓励更健康的生活方式

“公司健康计划不能被视为创可贴，你在健身应用程序中肯定无法找到它。参与、积极性、支持和战略是一项计划成功的关键。预防保健是一次生活方式和行为的彻底改变，并且改变需要时间和投入。”

Kinema Fitness首席执行官Joshua Love

尽管很多中国员工面临一系列不断增加的个人健康问题，这些问题源自选择了不健康的生活方式（吸烟、缺乏锻炼、办公室相关的压力），现在越来越多的职场人士意识到雇主为其提供的医疗保健福利的重要性。

门诊和医院护理目前被视为“基本”范畴，10家公司中有9家公司提供这样的福利。但是，4家公司中有1家公司更进一步，为员工提供投保自愿医疗保险计划的选择。尽管成本控制仍是中国普通员工的首要顾虑，但他们正在形成对其健康状态的长远观点。研究也表明，这对年轻员工和年长员工同等重要。



Wellness programs: The concern for employees' health goes beyond the worry of preparing for the possibility of a major illness or accident. Increasingly, China's workforce is keen to improve its health in a sustainable, ongoing fashion through the use of wellness programs provided by their employer. 2013 saw a marked increase in the use of company wellness programs in China, as employees made extensive use of the following:

Benefit	2012	2013
Health seminars	34%	42%
Vaccination	17%	20%
Employee Assistance Program	14%	16%
On Site Gym	11%	11%
Smoking Cessation	4%	6%
Weight Loss Program	0.2%	2%

Source: Mercer China 2013 Benefit Survey

Smoking: China accounts for 30% of the world's smokers and the increase in cessation programs and informative health seminars demonstrates the growing will among China's employers to encourage workers to avoid the significant health risks attached to smoking.

Stress: The adverse effects of feeling stressed at work cannot be ignored as they can lead to mental and physical health issues as well an adverse effect on employee performance. A recent survey suggested that 49% of China's employees feel stressed at work, which highlights the need of an effective Employee Assistance Program to curb this rise, particularly if companies wish to retain their staff for the long-term.

Obesity: A recent survey of 43,000 adults found that more than 11% of people aged 20 to 39 in China are obese, an increase of 2 percentage points since the last survey in 2010. 51% cited a complete lack of exercise as the reason for their being overweight. Overwhelmingly, they saw their overloaded work schedules as the primary cause for their weight, stating that they no longer had time to exercise.

Against a backdrop of rising health concerns emerging from unhealthy lifestyle trends, it is unsurprising to see the growing importance attached to healthcare and wellness benefits. In reaction to this trend, **forward-thinking HR departments need to spearhead policy changes in companies where such programs are lacking or otherwise ineffective.** Not only do these programs need to be committed to enabling better employee health, employees must also be properly informed and encouraged to use it to its fullest extent.

健康计划： 员工健康问题不只是考虑为可能出现的重大疾病或事故做好准备。中国的劳动力越来越急于通过使用雇主为其提供的健康计划，用一种可持续的不间断方式改善自己的健康状况。2013年中国的公司健康计划使用率明显提升，员工广泛使用以下计划：

福利	2012	2013
健康讲座	34%	42%
接种疫苗	17%	20%
员工援助计划	14%	16%
办公室健身房	11%	11%
戒烟	4%	6%
减肥计划	0.2%	2%

资料来源：美世中国2013年福利调查

吸烟： 中国烟民占全球烟民的30%，戒烟计划和内容充实的健康讲座增多证明，中国雇主鼓励员工避免与吸烟有关的重大健康风险的意愿增强。

压力： 在工作中感到压力的负面影响无法被忽视，因为这些影响可能会导致精神和身体健康问题，也对员工表现产生不利影响。近期的一项调查显示，49%的中国员工在工作中感到压力，凸显出利用有效的员工援助计划抑制此种上升势头的必要性，在公司希望长期挽留员工时尤为如此。

肥胖： 近期对43,000名成人的一项调查发现，中国20到39岁的人群中超过11%的人属于肥胖人群，与上次2010年的调查相比增长2个百分点。51%的人将肥胖的原因归结为完全缺乏锻炼。他们当中绝大多数人认为工作负担过重是导致其肥胖的主要原因，表示他们没有时间锻炼。

在不健康生活趋势导致健康问题增多的背景下，医疗保健和健康福利的重要性不断增强在意料之中。面对这种趋势，**具有前瞻性的人力资源部门需要在缺少此类计划或在其他方面缺乏效率的公司率先调整政策。**不仅需要致力于增强员工健康状况的这些计划，也必须适当告知并鼓励员工在最大限度内利用这样的计划。

STRATEGY: INTRODUCING FLEXIBLE WORKING CONDITIONS

“China’s young professionals seek greater flexibility, trust and autonomy from their employers than any generation in China’s history.”

Randstad World of Work Report 2013-2014, p.25

As the quickening pace of technology allows employees to collaborate more effectively wherever they are, employers are waking up to the benefits of allowing their staff more flexible working conditions. Remote working, compressed working weeks and BYOD (Bring your own device) are just a few of the new working practices that employees (particularly young graduates) find attractive in a prospective employer as they can significantly improve their work/life balance.

China is currently outpacing the majority of its Asia-Pacific counterparts when it comes to producing flexible working conditions. More than half of Chinese business organisations have had their performance in this area rated as good (35%) or excellent (16%).

However, there still remain a number of barriers to implementing flexible working in China. Principally these concerns include reduced employee productivity (a concern for 24% of employers), damage to team culture and communication (18%) and a lack of leadership necessary to champion flexible work effectively (18%).

Consequently, **in order to better attract and retain skilled staff, one of the key challenges facing HR departments will be to change the expectations and attitudes of company leadership. This will include addressing the root causes of these barriers to the implementation of flexible working conditions.**

战略：实行弹性工作制

“中国年轻的专业人士寻求从雇主那里获得比中国历史上任何一代人更大的灵活性、信任和自主权。”

任仕达2013/2014职场报告，第25页

由于科技进步速度加快使员工无论身处何地都能够更高效地协同工作，雇主们日益认识到允许员工弹性工作制的好处。远程工作、压缩工作周和携带自有设备（BYOD）只是新工作实践中的几种，员工（特别是年轻毕业生）觉得潜在雇主的这些做法很有吸引力，因为这样能够明显改善他们工作/生活的平衡。

在营造灵活工作环境方面，中国目前正在超越亚太地区大多数国家。半数以上的中国企业在这方面的表现评级为良好(35%)或优秀(16%)。

然而，在中国实行弹性工作制仍面临很多障碍。这些问题主要包括员工生产力下降（24%的雇主担忧的问题）、损害团队文化和沟通（18%）、缺乏有效捍卫弹性工作必要的领导力（18%）。

因此，**为更好地吸引和挽留熟练员工，人力资源部门面临的一个主要挑战是改变对公司领导层的预期和态度。这将包括解决实施弹性工作制面临的此类障碍的根本原因。**

DIFFERENCES ACROSS KEY MARKET SEGMENTS: MULTI-NATIONAL COMPANIES, PRIVATELY OWNED ENTERPRISE AND STATE OWNED ENTERPRISE

The talent war between these three business branches shows little sign of slowing as each ferociously competes to attract and retain the best fresh graduates and experienced professionals available. Each type of company has its own strengths it can leverage to make itself more appealing to the professional talent it needs to secure. Strategic HR departments must be aware of the attractive aspects of not only their own company, but also that of their rivals in order to create an effective HR strategy to attract and crucially retain valuable talents employees.



Multi-National Companies (MNC)

- **Diversified and Inclusive:** Drawing its employees from all over the world, MNCs are often the most inclusive and open-minded of China's business organisations.
- **Global Platform:** Has the ability to offer employees roles in a variety of international locations, often appealing to adventurous and mobile new hires.
- **Systematic Professional Training:** Greater opportunities to develop skill sets in an internationally recognisable way.



Privately Owned Enterprise (POE)

- **Aggressive and Comprehensive Salary Structure:** Attractive starting salaries with opportunity for rapid advancement.
- **Entrepreneurship:** Opportunities for bold, dynamic ideas to flourish.
- **Equity-Based Compensation:** Employees have a vested interest in company's performance and are rewarded for its success.



State Owned Enterprise (SOE)

- **Dominant in Some Industries:** Enjoys huge market share and little competition leading to increased job security and generous compensation.
- **Going Global:** Significant opportunities for employees looking to be part of a rapidly changing organisation.
- **Comprehensive Benefits:** Attractive compensation programs (healthcare, travel, etc.)

各主要细分市场的差别：跨国公司、私营企业和国有企业

这三类企业之间的人才争夺战几乎没有放慢的迹象，每类企业都为吸引并挽留最好的应届大学毕业生和经验丰富的专业人士展开非常激烈的竞争。每类企业都有自身的优势，能够借此使其对需要锁定的专业人才更具有吸引力。战略性人力资源部门必须不仅知道自身公司哪些方面具有吸引力，也必须对竞争对手的情况了如指掌，以便制定有效的人力资源战略，吸引并重点挽留宝贵的员工人才。



跨国公司 (MNC)

- **多元化和包容性:** 跨国公司吸引来自世界各地的员工，这些公司往往是中国企业组织中最具包容性和开放思想的公司。
- **全球平台:** 能够为员工提供在全球多个地点工作的机会，这通常很受爱冒险和流动性很强的新员工青睐。
- **系统的职业培训:** 更多机会以国际认可的方式发展技能。



私营企业 (POE)

- **积极全面的薪酬结构:** 有吸引力的起始薪酬，有机会快速晋升。
- **企业家精神:** 大胆、充满活力的想法有机会大放异彩。
- **股权薪酬:** 员工在公司绩效方面享有一定的既得权益，能够因其优异表现获得回报。



国有企业 (SOE)

- **在某些行业占据主导地位:** 享有巨大的市场份额、鲜有竞争，导致工作安全感提升、薪酬丰厚。
- **全球化:** 寻求成为快速变革组织一份子的员工面临的重大机会。
- **全面的福利待遇:** 有吸引力的薪酬计划（医疗保险、旅游等）

SECURING TALENT THROUGH HR TRANSFORMATION

“Less than 8 percent of HR leaders have confidence that their teams have the skills needed to meet the challenge of today’s global environment and consistently deliver innovative programs that drive business impact. To become an effective business partner, HR teams need to develop deeper business acumen, build analytical skills to underwrite their leadership, learn to operate as performance advisors and develop an understanding of the needs of the 21st-century workforce.”

Deloitte Consulting – Global Human Capital Trends 2014, p.107

The current talent shortage affecting China’s workforce will remain an issue for years to come and is likely to become even more acute. As we have already seen, the competition has moved from “within industry” to “cross industry” as culturally and professionally flexible individuals are sought after by organisations across divergent market segments.

This worsening shortfall has had the inevitable consequence of forcing China-based businesses to compete ever more fiercely to secure the prime candidates of their choice. Consequently, it is more vital than ever for HR departments to create innovative strategies to make their parent company a more attractive employment prospect for talented candidates.

Whether this involves the creation of more flexible working conditions, a more attractive benefits package or offering ongoing training and development opportunities, HR needs to be involved at the decision-making level in order to provide the effective strategic support that companies now need in order to succeed. However, this is only achievable if the HR department in question has undergone effective transformation and has the capability to move beyond a transactional role and undertake a position of strategic oversight.

通过人力资源转型锁定人才

“不到8%的人力资源主管对其团队拥有满足当今全球环境挑战所需的技能，以及持续提供推动业务影响的创新计划充满信心。要成为高效的企业伙伴，人力资源团队需要发展更深入的商业智慧，建立分析能力，接受领导职责，学习像绩效顾问那样运作，以及了解21世纪人才需求的情况。”

德勤咨询-全球人力资本趋势2014，第107页

目前影响中国劳动力的人才缺口仍是未来数年要面对的问题，形势有可能会更为严峻。正如我们已经看到的，竞争已经从“业内”转向“跨行业”，这是因为在各差异化的细分市场企业组织也在寻找具有文化和职业灵活性的人才。

人才缺口形势恶化不可避免的后果是，迫使中国企业为锁定他们选择的最佳候选对象展开更激烈的竞争。因此，更为重要的是，人力资源部门制定创新战略，使母公司为候选人才创造更有吸引力的就业前景。

这是否包括创造更灵活的工作环境、更有吸引力的福利方案或提供持续培训和发展机会，需要人力资源部门在决策层面的参与，从而提供现在公司成功所需的有效战略支持。不过，这只有在相关人力资源部门经历有效转型，能够超越事务性角色，以及承担战略监督职责之后才能实现。

然而，在中国实行弹性工作制仍面临很多障碍。这些问题主要包括员工生产力下降（24%的雇主担忧的问题）、损害团队文化和沟通（18%）、缺乏有效捍卫弹性工作必要的领导力（18%）。

因此，为更好地吸引和挽留熟练员工，人力资源部门面临的一个主要挑战是改变对公司领导层的预期和态度。这将包括解决实施弹性工作制面临的此类障碍的根本原因。

- How to transform your organization into a magnet for talent?
- How can HR become a real strategic partner and create business value?
- What are the most exciting opportunities in the fast-paced realm of HR transformation?
- Which strategies and best practices are right for my business?

2nd Annual HR Transformation & Service Delivery Summit China, 26 - 28 August, Shanghai, answers these questions and gives you the chance to meet senior HR thought-leaders from across industries. The event features practical case studies, vibrant panel discussions and in-depth workshops to help you build an agile enterprise with enhanced shared services, robust HR systems and a visionary people strategy. Whether you are planning your transformation initiative or are in the midst of change, this summit will open the door for you to take on a more strategic role in your business and "sit at the table".

To find out how you can attend, simply click on the event logo below:



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& SERVICE DELIVERY SUMMIT CHINA

- 如何将你所在的组织转型成为人才磁场?
- 人力资源部门如何能够成为真正的战略合作伙伴并创造企业价值?
- 在快节奏的人力资源转型过程中最令人振奋的机会会有哪些?
- 哪些战略和最佳实践适合我所在的公司?

8月26日-28日在上海举行的**第二届中国年度人力资源转型和服务交付峰会**，为你解答这些问题并为你提供与各行业高级人力资源思想领袖见面的机会。

活跃的小组讨论和深入的专题讨论会以实用的案例研究为主，助您利用改善的共享服务、稳健的HR制度和富有远见的人才战略打造一家灵活的企业。无论您正在规划您的转型举措还是正处于变革之中，此次峰会都将为您打开大门，使您在企业中承担更具战略性的职责以及“亲身参与企业事务”。

欲了解如何参加，请点击下方的会议标识：



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