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Notes from the Chief Editor: Tracing and Quantifying HR Trends
主编寄语：刻画可量化的HR历史痕迹

亲爱的客户：

我们生活在这个时代，就不得不跟数据打交道；确切的说，你我也是数据的一部分。最直接的例子：您收到了这份China Monitor五周年特刊，说明您曾提供过至少一次重要数据——是五年来的您成就了今天的她。

特别感谢您，6011个公司（次），撑起了19期超过130议题逾2500页报告。2009年面对经济危机创刊伊始，很多人都没有料到，China Monitor以坚定虔诚而理性热情的心态，直面经济和人才市场的起起伏伏，刻画可量化的HR历史痕迹，报告内容和客户数量不断扩充，五年来冉冉成长，为美世中国的又一可靠品牌。

以史为鉴可兴亡。弹指五年，当时的及时信息是否已经折旧？浓缩成的60页回顾报告是否值得您细细翻阅？诚然，静态的历史数据已不能直接用于动态的当下决策。但是，串联历史却能帮助我们，再次检视各时期公司应用数据决策的准确性，从而把握趋势而提升未来决策的科学性。这就是我们出版五周年特刊的最重要目的。

区别于传统的调研2.0时代大幕已经开启。在人力资源大数据时代，洞察数字背后的规律和趋势，各位HR是先行者先试者，采访并汇报于你们的China Monitor则是先知者先觉者。China Monitor所开创的周期性跟踪核心数据、结构分析最新热点、及时调研迅速发布的方法，将使这份调研在未来的路上依然走在市场前列。

无论您是数据的提供者、分析者、阅读者，都将在这个过程中收获数据洞察力。这个就是我们在未来大数据时代成功的关键之关键。

感谢您五年来对China Monitor的支持，我们期待与您的继续合作！

李娴珏，中国区业务总监，信息咨询业务
Dear Clients:

New technologies have made data an integral part of our lives. We have also been actively responsible for their contents. China Monitor’s 5th Anniversary Report is a clear example of this dynamic: as a reader, you have in the past provided us with important data. Your participation and contribution in the past 5 years have made this report possible.

Special thanks, many times over, to 6011 companies, for having supported 19 issues of China Monitor, with coverage of more than 130 topics on over 2500 pages of published reports. Since the release of the inaugural issue following the economic crisis in 2009, China Monitor has, with steady enthusiasm and strong analytics, exceeded expectations in capturing economic ups and downs and talent market trends. Subscriber growth in the past 5 years has continually enriched our contents and enabled us to quantify the changing landscape of HR, all the while giving credence to yet another product under the Mercer China brand.

Our past can help guide our future. As time passes, what once served as timely information is now old news. But is it simply outdated? Does this 60-page retrospective summary report still call for a close review in the present? Surely historical data hold no currency in business decision making at the moment. However, seeing patterns can help us. When we re-examine why and how companies strategically used data in each passing quarter, we stand a better chance of grasping key trends and making more solidly grounded decisions going forward. This is the most important purpose of this Anniversary Report.

Moving beyond traditional survey models, the Web 2.0 era has begun. In the era of Big Data, data intelligence is jointly achieved by HR managers who explore new territories and China Monitor reporters who follow and mark their paths with signposts. Our quarterly follow-up of core data, structural analysis of focus topics, and timely publication of survey results will keep China Monitor at the forefront of talent market information.

For data providers, analysts, and readers alike, the final goal is to gain relevant insights. This is the ultimate key to success in the era of Big Data.

Thank you for having supported China Monitor in the past 5 years. We look forward to continuing our work with you in the future.

Maggie Li, China Business Leader, Information Solutions
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6. Policy Updates 政策变化汇总 54
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Mercer swiftly responded to the economic crisis in 2008 with a survey called *How Economic Downturns Affect HR Practices* to offer management advice and coping strategies to clients facing critical HR challenges and decisions.

At that time of global turmoil, near all the survey participants reported feeling some degree of impact. Tight control of salary, hiring, training, and company travel became a rising trend. While most had no immediate plan to change existing policies and business plans in 2008, some started looking for expense-/cost-control measures. Others kept a close watch on economic trends and market reactions.

### Salary
- **on the whole, we saw an adjusted forecast on salary increase rate from 10% to 8.4%**. 14% of respondents planned to decrease salary budget by more than 30%, while 45% intended to keep their original salary budget unchanged.

### Bonus
- **21% of respondents reduced the bonus pool amount originally budgeted in early 2008**. When making short-term incentive plans for 2009, 16% of companies considered shrinking the bonus pool, while 13% revised the proportion of variable pay vs. fixed pay by lowering the percentage of variable pay.

### Promotion
- **79% of survey respondents stated that the financial crisis would have no impact on their employee promotion plans.**
Why China Monitor

China Monitor 前身


2008年快速调研：经济衰退如何影响人力资源实践（2/2）

- **Performance Appraisal** – The majority of the surveyed companies (86%) made no plans to revise the current performance appraisal cycle. Only 8% considered increasing the frequency of performance review to closely supervise business performance. In addition, 6% planned to strengthen management of key business functions where performance would most directly impact overall business results.

- **Recruiting** - Nearly half of the survey participants planned to shift their recruiting focus more toward key talent recruitment.

- **Training** – Survey results indicated that over 50% of participating companies had considered cutting training budget as a means of cutting cost. At the same time, 23% might place limits on overseas training programs, and 76% planned to use internal training resources in place of external training programs.

- **Workforce** – The most vulnerable employee categories were operators and middle management, while senior professionals are the focus of talent retention.

After *How Economic Downturns Affect HR Practices* received positive client reviews for its analysis of the latest economic and HR market information, Mercer followed up with a new quarterly report, *China Monitor*, to bring domestic and global market hot topics to clients in need of timely access to information critical to management decision making. “经济衰退如何影响人力资源实践”调研切实帮助客户了解最新的经济和人力资源市场现状，受到客户的广泛好评。美世咨询准确捕捉客户需求，决定在2009年开始推出一个全新的季度性调研报告：*China Monitor*，以帮助客户观察全球和中国最新市场热点，及时形成管理应对。
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7. Looking Forward 未来的路  60
In the past 5 years, the number of companies taking part in China Monitor surveys has increased from 308 to 634, a nearly 100% cumulative growth rate, and an annual increase rate of 19.8%. The majority of participants come from Hi-tech, M&E, and Consumer industries. Companies from other industries have also been quickly increasing in number.

在过去五年，China Monitor的年度参与公司数从308家增加到634家，累计涨幅近100%，年化涨幅为19.8%。高科技、机械与电子行业、消费品行业是参加调研公司最多的行业，其他行业参与公司数也在快速增长。
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### Merit Salary Increase - by Industry

#### 薪资增长——按行业划分

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### Merit Salary Increase - by Location

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Key Findings on Salary Increase Rates
薪资增长率主要发现

- On the whole, most companies started to face up to the financial crisis in 2009. As a result, the annual salary increase rate plunged to 6.0%, the lowest level in the last decade. In 2010, signs of economic recovery caused the salary increase rate to slightly rebound to 7.4%. In 2011, fuller recovery and intense competition for talents pushed the salary increase rate to 9.7%, a record high in the past decade. In 2012 the rate stayed high at 9.4%. These salary increase figures topped the GDP increase figures from 2011 to 2012. In 2013, as economic prospects became uncertain, the salary increase rate fell to 8.5%, which was still higher than the expected GDP increase rate for the same year. In the past 5 years since 2008, the average salary increase rate is 8.2%. If compounded by salary increase rates, the remuneration cost of Chinese companies have increased by 48% in the past 5 years.

- Most industries have followed similar change patterns. Ranked by the average salary increase rate in the past 5 year, Pharma & Medical Device comes up on top at 9.2% and a compounded increase rate in the past 5 years exceeding 55%. Labor-intensive industries such as M&E sees the second highest average salary increase rate of 8.7% and a compounded increase rate of more than 50% in 5 years, due largely to attempts to raise minimum wage since 2010. The Auto industry has seen the greatest volatility in the last 5 years, ranging from 5.4%, the lowest salary increase level in 2009 to 10.3%, the highest in 2012. The most stable industry in the recent 5 years is the Consumer industry, showing a 2.1 % difference between the highest and the lowest increase rates.

- By location, differences among salary increase rates in Tier-1 cities were small. As the economy rebounded in 2011, salary increases in Tier-2 cities resumed more quickly than in Tier-1 cities, and their average increase rates reached almost double digits. The average salary increase rate in Tier-2 cities in the last 5 years is 8.4%, higher by 0.7 percentage points than that in Beijing and Shanghai (7.7%) for the same period.

- From the perspective of city-level wage increases, the gap between cities has narrowed. Since 2012, city-level wage increases have been faster in Tier-2 cities than in Tier-1 cities.
Quarterly Average Headcount Plan - by Industry

<table>
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Mean Headcount Plan%
Key Findings on Headcount Planning
人员编制主要发现

• The average headcount increase rate in this report is calculated quarterly (when applicable), not annually.
  本报告统计的平均季度员工编制增幅是取一年四个季度（如有）员工编制计划的季度平均值，而非年度增幅。

• Generally speaking, headcount planning is more sensitive to economic fluctuations than salary increase rates. The average headcount increase rate was 6.1% in 2009 and went up to 8.5% in 2010. With companies receiving more business orders in 2011 and trying to fill the positions left vacant by layoffs in the preceding 2 years, the average headcount increase rate climbed to 10.4%, a historical high. As economic conditions became uncertain in 2012 and 2013, lay-offs were not common, but the average quarterly headcount increase rates dropped to 3.5% and 2.2 %, respectively, even lower than that in 2009.

• Compared by industry, while High Tech saw the largest proportion of laid-off employees during the economic crisis, it also saw the sharpest rise in headcount during economic recovery, averaging a headcount increase of 6.8% in the past 5 years. Having experienced continuous growth, Pharma & Medical Device averages a headcount increase of 6.5%, followed by Consumer (5.9%), in the past 5 years. Chemical claims the most modest headcount growth with an average increase rate of less than 5% in the past 5 years.

• In the past 5 years, The Hi-tech industry has seen the greatest volatility in headcount, with the highest average increase rate reaching 12.4% in 2011 and the lowest dipping to 2.8% in 2013. The Consumer industry has enjoyed the most stable headcount growth.

• Viewed by location, headcount increase rates vary little in different regions. It is worth noting that in 2010, Eastern China cities (including Shanghai and Tier-2 cities) as well as Southern China cities (including Guangzhou, Shenzhen and Tier-2 cities) that are dominated by the manufacturing industry led the rebound in headcount.

• From the region来看，各地区的员工编制增长差异性较少。值得一提的是，在2010年中，是制造业更多的华东地区（包括上海和二线城市）和华南地区（包括广州深圳和二线城市）首先引领了编制的反弹。
Voluntary Turnover Rate - by Industry

自愿离职率——按行业划分

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Involuntary/Retrenchment Turnover Rate - by Industry
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Voluntary Turnover Rate - by Location

自愿离职率——按地区划分

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Involuntary/Retrenchment Turnover Rate - by Location

非自愿离职率/裁员率——按地区划分

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Mean Involuntary Turnover %

- 2008: 5.7
- 2009: 6.5
- 2010: 4.5
- 2011: 5.6
- 2012: 4.9
Key Findings on Turnover Rates
离职率主要发现

- For the past 5 years, most industries consistently saw a double-digit turnover rate. Following the economic crisis in 2009, the overall turnover rate dropped to 11%, the lowest point in the previous decade. When economic recovery peaked in 2011, the turnover rate soared to 20%. Involuntary turnover rate lingered between 4% to 7%, climbed to 6.5% in 2009, and quickly fell to 4.5% in 2010. If we do a simple compound calculation of the overall voluntary turnover rate in the past 5 years, only 42.6% of workers could claim 5 years of continuous employment in the same company.

- Compared by industry, High-Tech, M&E, and Consumer witnessed the most active talent flows in the past 5 years, showing an average voluntary turnover rate of more than 15%, and an average involuntary turnover rate of toughly 6%. Pharma & MD, Auto and Real Estate had an average voluntary turnover rate of less than 15%. Pharma & MD and Auto kept their average involuntary turnover rates relatively low, below 4%. In the past 5 years, the average voluntary turnover rate in the Chemical industry is merely 9.3%--we saw a double-digit number only in 2011.

- By Location, voluntary turnover rates in Southern China cities (including Guangzhou, Shenzhen, and Tier-2 cities) remained relatively high, approaching or exceeding 20%. Involuntary turnover rates in Southern China areas were relatively lower, i.e., 2.8% in 2008 and 2.9% in 2010. Northern China cities (including Beijing and Tier-2 cities) have kept voluntary turnover rates relatively low.
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## Quarterly Breakdown of Focus Topics from 2009 to 2013

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Survey results showed that salary increase rates for nearly half of the companies (49%) were set by global headquarters, who clearly had a big say in salary matters. As the economic crisis began to hit businesses in H2 2008, companies in various industries started to adjust salary increase rates downwards. In 2009, only 64% of the surveyed companies kept their original salary adjustment timeline. More than 10% opted to delay salary review by 3 to 6 months. 12% still had no firm salary adjustment plan or timeline in Q1 2009. More than half of survey respondents expected salary increase rates to drop in 2009. We saw a steady decline in published figures, from 9.9% in September 2008, to 8.4% in November 2008, and finally to 7.4% in Q1 2009. Despite a continuing downward trend in 2009, salary increase figures in China appeared relatively encouraging in the global context.

15% of survey participants implemented a salary freeze in 2009. Most seriously impacted were US companies (20%) and the High Tech industries (24%). Management level employees including those at the middle and senior levels (more than 90%) were hardest hit.

2% of survey participants planned to reduce salary in 2009. Manufacturing and production were the most vulnerable business functions. Higher ranking employees were more likely targets for pay cut.

Survey results showed that employees in manufacturing/production departments accounted for the biggest proportion of laid-off employees. In terms of seniority, those with 1-3 years of employment length made up the highest percentage or half of all laid-off employees. The severance calculation method stipulated by the government, “N+1” or “N+2”, was most prevalent among 50% of the surveyed companies. More than 90% of the surveyed companies carried out their own workforce reduction plan.

In production/manufacturing departments, the proportion of lay-off employees with 1-3 years of work experience was the highest. Among the surveyed companies, the calculation method of “N+1” or “N+2” was most commonly used by 50%. More than 90% of the companies carried out their own workforce reduction plan.
Campus Recruitment 校园招聘
37% of the surveyed companies did campus recruitment, but for most, campus recruits composed less than 5% of entire workforce. The majority of new recruits from universities were hired into Technology, R&D, Manufacturing, Engineering and Sales divisions. No company tried to hire new staff for HR or Administrative departments through campus recruitment.
37%的公司进行了校园招聘，但是大部分公司从校园招聘的员工比例都在5%以下。从部门的角度来看，校园招聘来的大学生主要流向技术、研发、生产制造、工程和销售部门，没有一家公司表示他们会在校园招聘过程中为人力资源部门或者行政部门挑选新员工。

HR Budget 人力资源预算
25% of the surveyed companies planned to increase HR budget in 2009 by an average of about 12.4%. The Pharma & MD industries saw the largest increase (45% of respondents, by an average increase rate of 15.0%). Additional HR budget would be allocated mainly to base salary and bonus pool. 38% of respondents intended to cut their HR budget by an average decrease rate of 13.3%. The High Tech industry experienced the most drastic budget reduction (50% of respondents, by an average decrease rate of 15.4%), mainly in training, recruitment and employee activities.
有25%的公司会增加2009年的人力资源预算，平均增幅为12.4%，其中医疗和医疗器械行业最乐观（45%公司，平均增幅15.0%），主要增加在员工的基本薪资和奖金方面；有38%的公司会减少这一预算，平均降幅为13.3%，其中高科技行业降幅最激进（50%公司，平均降幅15.4%），主要从培训、招聘和员工活动经费上进行削减。

Bonus 奖金
The majority (80%) of survey participants expected to follow their original bonus pay-out timeline. 63% clearly positioned themselves against modifying employee variable pay as a response to economic uncertainties. 9% had firm plans to reduce their bonus pool in 2008. 大部分公司（超过80%）将维持原定的奖金发放时间。有63%的公司明确表示他们不会采取调整固定/浮动比来应对经济动荡。9%的公司明确表示会减少2008年的奖金池。

Compulsory Leave 强制性休假
Survey results showed that 25% of respondents enforced compulsory leave, with US companies most actively taking part (33%). Some companies allowed employees to request advanced vacation leave time from the following year.
调研结果显示，有25%的公司实施了强制性休假的措施，其中美资公司的比例最高（33%）。有公司表示，强制性休假可以预支次年的休假额度。
• **Lay-off Plan 裁员**
  22% of the surveyed companies downsized in Q1 2009, with an average layoff rate of 6.2%. In early 2009 China’s State Council announced a policy on layoff: if an enterprise intends to lay off more than 20 employees or more than 10% of entire workforce, the enterprise must explain its rationale to the labor union or the entire staff 30 days in advance, as well as report to the local labor administrative department. Severance calculation became a HR focus topic. Many companies (more than 30%) planned on adding extra layoff compensation to the statutory payment (“N+X”). HR managers generally prioritized “respect” in communicating layoffs.

• **2009 第一季度，有22%的公司进行了裁员，裁员比率的平均值6.2%。根据2009年初国务院有关通知，企业需要裁员20人以上或比例超过10%需要提前30天向工会或全体职工说明情况，并且向当地政府报批。裁员经济补偿金成为热点议题，超过30%的公司会在劳动法规定的基础上给予额外的经济补偿（N+X形式）。HR在沟通过程中普遍把“尊重”放在了首要位置。**

• **Key Talent Retention 关键人才保留**
  Companies maintained their talent retention practices, adopting career development (46%) and promotion (37%) as two top retention strategies.

• **Training Plan 培训**
  Companies turned to training budget as the first place to cut in HR budget. 51% of survey respondents planned to cut training budget in 2009. Overseas training and career development training were two types of training that suffered the most impact. In terms of resources, HR budget for contracting external trainers was cut more sharply.

• **Employee Benefits 员工福利**
  Survey results showed that the economic crisis had limited impact on employee benefits budget. 66% of respondents definitely had no plan to adjust their 2009 employee benefits budget. 12% would reduce these benefits, primarily in the forms of grants, subsidies, and car/transportation allowances.

• **2009 – Q2**
2009 – Q2

- **Employee Promotion 员工晋升**
  - 48% of the surveyed companies continued to uphold their 2008 employee promotion policies. Among those who intended to make adjustments, 50% would reduce the promotion headcount or ratio, while 11% would narrow the promotion salary increase.
  - 有近一半的公司（48%）将保持2008年的员工晋升政策不变。那些表明将改变员工晋升政策的公司中，有17%的公司声称他们将会在2009年减少员工晋升的数量或比例，有11%的公司表示，他们将从降低晋升员工的薪资增长水平入手。

- **Employees Concerns 员工意见**
  - As the downward trend in salary increase continued, employees became most concerned with their future salary growth prospects. 36% of the surveyed companies reported a very high level of salary concerns, followed by job security concerns, among employees. Pensions and health care benefits were of the least concern to Chinese employees. According to the survey, among companies where employees felt less concerned with promotion, the majority (72%) upheld their 2008 promotion policies, thus calming employee doubts and worries. Among companies where employees expressed great concerns over promotion, 50% had postponed their promotion timeline, and 50% had reduced the number or ratio of employees for promotion.
  - 随着市场整体薪资增长率的不断调低，员工对未来的薪资增长率表现的最为担忧，有36%的公司表示他们的员工对此问题的担忧程度很高，紧随其后的是职业和工作安全感的问题。而养老金和健康福利计划，是中国员工最少担忧的两个问题。调研发现，那些对晋升问题担忧较少的公司，是因为他们大多数（72%）延续了2008年的员工晋升政策，从而其公司的员工并不非常担心有关晋升的问题，而那些对晋升问题非常担忧的公司中，有50%推迟了晋升时间，有50%采取了减少晋升员工数量的措施，这也许是造成其员工担忧程度较高的主要原因。

- **Executive Compensation 高管薪酬**
  - In February 2009, both the US and China imposed a cap on executive compensation. Survey results showed that 19% of respondents had taken actions to reduce their overall executive compensation. 66% had put into effect a salary freeze on their executives, while 27% had decreased the salaries of their executives.
  - 09年2月，美国和中国先后颁布针对金融行业高管的限薪令。调研发现，有19%的公司已经采取了措施来减少公司高管的整体薪酬。其中，有66%的公司对他们公司高管采取了冻薪，27%的公司采取了减薪。
2009 – Q3

• **Recruitment** 招聘
  Compared with the recruitment rate in Q2 (56%), more companies (63% of those surveyed) intended to recruit in Q3, while expecting the average percentage of new hires to remain the same at 6.0%. 72% of the surveyed companies had difficulties finding the right talent. 27% reported that the right talents had higher salary expectations. In the aftermath of the economic crisis, most companies tightened control of headcount. Downsizing and hiring freeze were common practices, leaving few vacancies on the job market. Sought-after talents had to pay a higher cost of opportunity to change job, and when they did, they demanded higher salary.

• **Downsizing** 裁员
  17% of survey participants downsized in Q2 2009, down by 5 percentage points from Q1.
  2009年第二季度，有17%的公司进行了裁员，比第一季度的裁员公司比例降低了5个百分点。

• **HR Budget** 人力资源预算
  The majority of companies stayed within the allocated HR budget. 28% expected actual spending to be less than projected budget in 2009.
  大部分的公司采取低于或者持平预算的方式来分配使用人力资源预算，28%的公司表示2009年实际人力资源支出可能低于预算。

• **Salary Structure** 薪资结构
  57% of the surveyed companies made no adjustment on their salary structure in 2009. Among those who did, most chose to reduce base salaries and increase bonuses in favor of performance-based pay and to protect employers’ risk while giving performing employees the opportunity to receive higher pay.
  有57%的公司在2009年没有对薪资结构进行任何调整。在进行薪资结构调整的公司中，主要采用的调整方式为增加奖金比例和降低基本工资比例，目的在于激励员工通过业绩提高而获得更高收入，与企业共渡危机。

• **Domestic Relocation Policy** 国内派遣
  In 2009, the majority (89%) of companies made no changes in domestic relocation policies. Among those who did, most opted to focus on relocation allowances.
  2009年，大部分公司（89%）不会调整其国内异地派遣政策。如果进行调整，则主要集中在派遣津贴上。
2009 – Q3

- **Employee Benefits** 员工福利
  - 在2009年，公司采取了多种多样的手段来有效控制员工的福利成本。46%的公司表示他们会加强与员工在福利方面的沟通，28%的公司加强对福利供应商的管理，而23%的公司表示通过采取预防性的措施来改善员工的健康管理。

- **Expatriate Benefit Policy** 外籍员工管理
  - 2009年，12%的公司考虑调整其外籍员工的福利政策。其中，半数的公司表示会改变外籍员工的住房福利政策、医疗保险政策。

- **Medical Reform & Medical Benefits Policy** 医改和医疗福利
  - 2009年4月6日发布的《深化医药体制改革的意见》中，医疗体制改革三年内的目标是到2011年医疗保障将覆盖90%的中国人口。为此，政府将在未来3年投入8000亿人民币。2009年6月6日发布的《深化医药体制改革的意见》中，医疗体制改革三年内的目标是到2011年医疗保障将覆盖90%的中国人口。为此，政府将在未来3年投入8000亿人民币。
2009 – Q4

- **Campus Recruitment** 校园招聘
  - 24% of companies planned to conduct campus recruitment in Q4 2009. Compared by enterprise ownership type, more Chinese companies (42%) than foreign companies intended to recruit from campuses in Q4.
  - 有24%的公司计划在2009年第四季度进行校园招聘。从公司类别上来看，有42%的中资企业计划在第四季度进行校园招聘，高于其它外资企业。

- **Downsizing** 裁员
  - 8% of companies downsized in Q3 2009, down by 9 percentage points from Q2. The average (annual) layoff rate in downsizing companies was 7%.
  - 2009年第三季度，只有8%的公司进行了裁员，比第二季度的裁员公司比例降低了9个百分点。在这8%的进行裁员的公司中，他们的平均裁员比率为7%。（年度）

- **HR Budget** 人力资源预算
  - The majority of companies prepared their HR budget for the following year from September through December, with peak months in September (23%) and October (21%). Many made optimistic forecast for 2010 in comparison to 2009: 47.52% expected a bigger budget, while only 7.80% expected HR budget to decrease in 2010.
  - 绝大部分公司在9月至12月制订下一年度的人力资源预算，其中9月（23%公司）、10月（21%公司）比例最高。对于2010年的人力资源预算，公司做出了乐观的预期。有47.52%的公司表明2010年人力资源预算会高于其2009年，仅有7.80%的公司表示会减少。

- **Key Talent Retention** 人才的吸引与保留
  - Survey results showed that companies offered career development and promotion as primary means of talent attraction and retention, followed by actively responding to employee request and assigning them more challenging and creative work.
  - 公司选择将职业发展及晋升作为人才吸引和留存的首要手段，其次是积极回应员工需求，赋予更有挑战，更具有创新的工作任务。

- **Annual Bonus** 年终奖金
  - Nearly half of the surveyed companies had not finalized their 2009 bonus pool budget. 8.7% were certain their budget for 2009 would be smaller than that for 2008.
  - 有将近半数的公司目前还难以确定2009年年终奖的发放额度，8.7%的公司明确表示2009年的奖金将会比2008年有所减少。
2009 – Q4

- **Performance Management** 館效管理
  - 53% of companies used ranking in professional employee performance evaluation. 35% used ranking for executives. A five-level performance rating system was most widely adopted (65%). In terms of frequency, more than 80% of companies appraised employee performance annually, 15% quarterly. 8% conducted monthly appraisal of blue collar workers.
  - 有53%的公司对专业人员的绩效考评结果实施强制分布；对高级管理人员，这一公司比例是35%。五级制是被最多公司（65%）所采取的绩效等级制。从绩效评估频率上来看，八成以上的公司对员工进行年度绩效评估，15%的公司进行季度评估，另有18%的公司对蓝领进行月度评估。

- **Double-salary scheme** 双薪制
  - The State Administration of Taxation (SAT) released the Circular on Clarifying Several Policy Implementation Issues of Individual Income Tax on August 31, 2009. According to the Circular, the extra one month’s salary paid by organizations in accordance with the double-salary scheme will not be separately taxed as an additional monthly salary. Two tax calculation methods have come into effect since the release of the Circular: one is to merge the extra salary with the previous month’s income (which may push the tax rate to a higher income bracket); the other is to define “double salary” as an annual one-time bonus to be disbursed monthly over a 12-month period and taxed monthly by applicable tax rates. Survey results showed that 8% of companies opted to spread out “double salary” payment over 12 months, as addition to employee’s regular base pay.
  - 国税总局在2009年8月31日下发了《关于明确个人所得税若干政策执行问题的通知》（以下简称通知），通知中明确了《国家税务总局关于个人所得税若干政策问题的批复》（国税函[2002]629号）（以下简称批复）中“双薪制”的单独计税方法停止执行。 “双薪”单独计税废除后，有两种计税方法：一是双薪合并到当月来计税；二是分摊计税，将全年一次性奖金收入全额分摊至12个月，再按照每月分摊额确定适用税率计算应缴税额。调研发现，8%的公司表示他们会采取分摊制（将双薪均摊到12个月的基本工资中发放）。
2010 – Q1

- **2010 HR Priorities 2010年首要工作重点**
- During the economic recovery in 2010, employee retention and recruitment were HR priorities, with companies rating them as top action items for this year, 23.3% and 22%, respectively. The biggest challenge was how to meet employee salary expectations under a still tight budget in order to retain and motivate them.
- 面对2010年的经济复苏，员工保留和招聘是当前HR工作的头等大事，分别有23.3%和22.0%的公司将其列为2010年的第一工作重点。如何在薪酬成本尚不宽裕的情况下满足员工的期望，从而保留员工、激励员工，将是2010年HR工作者面临的最大挑战。

- **Downsizing 裁员**
- 1/3 of survey participants indicated that they had downsized in 2009, with an average layoff rate of 9.2%. The proportion of companies that had adopted layoff measures in 2009 in a quarterly breakdown was 22% (Q1), 17% (Q2), 8% (Q3), and 11% (Q4). Downsizing in Q4 took place mostly in the Consumer, High-Tech, Mechanics, Electronics, and other industries. In 2009, 29% of survey participants reported having reduced headcount.
- 有三分之一的公司表示他们在2009年进行了裁员，裁员比率的平均值为9.2%。四个季度裁员的公司比例依次是22%、17%、8%和11%。从行业分布来看，第四季度的裁员主要集中在消费品、高科技、机械和电子等行业。2009年有29%的公司表示他们进行了减编。

- **Blue-Collar Worker Shortage 蓝领工人短缺**
- 40% of employers of blue-collar workers reported that worker shortage had become “serious” or “very serious” during H2 2009. Two main reasons were: Shortage of local labor (34% of companies) and greater business volume (23% of companies). Optimizing recruitment channels was the measure adopted by the largest proportion of companies (39%) in coping with the worker shortage.
- 在雇佣蓝领工人的公司中有40%表明蓝领工人的短缺现象在2009年下半年已经达到“严重”或“非常严重”的程度，本地劳动力不足（34%公司）和公司业务恢复的加快（23%公司），是造成蓝领工人短缺的两大主要原因。而优化招聘渠道则成为被最多的公司（39%）所选用的应对措施。

- **Annual Bonus 年终奖金**
- The majority of companies (86%) indicated they would pay 2009 annual bonuses on schedule. Only 2% planned to delay pay-out, and only 3% did not intend to offer any bonus. 21% of companies intended to raise bonus amount from 2008 by an average increase rate of 36%. 12% of companies planned to cut bonus amount by an average decrease rate of 26%.
- 绝大部分公司（86%）表示2009年年终奖金会按时发放，表示推迟发放的只有2%，而明确表示不发放的公司占比只有3%。有21%的公司表示与2008年相比年终奖额度增加，增加额度的平均比率为36%；有12%的公司表示额度减少，减少的平均比率为26%。
2010 – Q1

- **HR Budget 人力资源预算**
  - As the economic recovery picked up speed, and due to increases in social welfare and public accumulation funds following an overall increase in annual income across the board, companies began to expand investment in HR management. 43% of companies expected their HR budget to increase in 2010 by an average increase rate of 15.6% for improving employee base salaries, bonuses, and benefits. 随着经济复苏的脚步加快，以及社会平均工资增加所导致的社保和公积金增加，公司也开始加大在人力资源管理方面的投入。有43%的公司表明2010年的人力资源预算将会增加，增加的平均比率将达到15.6%。而增加的主要方面将集中在基本工资、奖金和福利等方面。

- **Supplemental Insurance Tax 补充保险的缴税**
  - In November 2009, China’s Ministry of Finance formally included accident insurance and supplemental medical insurance as part of individual income tax liability. Survey results showed that 25% of companies bore the tax burden on supplemental medical insurance, while 27% passed the burden onto employees. Other companies were still undecided. 2009年11月，国家财政部进一步明确了将意外保险和补充医疗保险等纳入工资总额进行计税。调研结果显示，有25%的公司表示补充保险的缴税由公司承担，而27%的公司表示由员工承担，其他公司表示他们还在考虑应对措施。

- **Double Salary Scheme 双薪制**
  - In the Q4 2009 survey, we discussed in details the “double salary scheme” policy. Our latest survey showed that combining double salary with year-end bonuses into one lump sum was the most common payout method (adopted by 57% of companies), followed by disbursing double salary with the year-end, last month’s salary (27%). Some companies were willing to let employees decide the time and method of double salary disbursement. 在上个季度的调研中，我们已经就“双薪制”的细节进行了探讨。本次调研我们发现，在采取“双薪制”的公司中，将双薪并到年终奖金一起发放是最为通行的做法（57%公司），其次是将双薪并到最后一个月来发放（27%公司）。有的公司甚至表示，将给予员工更多的自主权，由员工自己来选择发放的方式和时间。
2010 – Q2

Blue-Collar Worker Recruitment 蓝领工人招聘

From H2 2009 to 2010, a relatively serious shortage of blue-collar workers persisted. Our survey in Q1 2010 showed that most employers tried to cope by optimizing labor recruitment channels. In Q2 2010 we further researched this topic. Survey results showed that most companies still turned to staffing agencies as first choice, in addition to more traditional methods such as job posting websites, internal employee referral, and job fairs in industrial park areas. Survey results showed that hiring one blue-collar worker cost companies on average 12.7 days and 324 RMB.

Labor Disputes 劳资纠纷

Many companies downsized during the 2009 economic crisis and as a consequence had to face labor disputes. 35% of companies experienced some type of labor dispute or labor arbitration. Among these companies, 56% reported over 50% of dispute resolutions in favor of the company.

Expatriate Employees’ Social Insurance 外籍员工的社保

Recently, some Chinese cities began to allow non-Chinese employees to participate in China’s social insurance program. As of Q2 2010, 50% of companies had no plans to offer local social insurance benefits to expatriate employees. 29% remained undecided and unsure whether doing so would significantly enhance benefits for expatriate employees.
2010 – Q2

- Human Resource Outsourcing 人力资源外包
  - Survey results showed that 17% of companies planned to outsource a portion of their human resources functions in 2010. Among these companies, the majority chose to outsource payroll (51%) and recruitment (33%).
  - 有17%的公司打算在2010年将人力资源的部分工作模块外包出去。其中，薪资的计算和发放（51%公司）、招聘（33%公司）是被最多公司外包出去的人力资源工作模块。

- Tax Liability Of Enterprise Annuity (EA) 企业年金的缴税
  - On December 10, 2009, China’s State Administration of Taxation issued a “Notice by the State Administration on Relevant Issues Concerning the Collection and Management of Individual Income Tax in Enterprise Annuity,” requiring the separation of the enterprise liability portions within EA from normal employee salary and income, thus offering a tax break for businesses in their EA contribution. However, survey results showed that 71% of companies had not yet implemented any EA-related plans.
  - 2009年12月10日，国家税务总局发布了《国家税务总局关于企业年金个人所得税征收管理有关问题的通知》，规定企业年金中的企业缴费部分不与正常工资、薪金合并，实为对年金企业缴费部分给予税收扶持。但调研结果显示，有71%的公司暂没有实施年金的计划。
2010 – Q3

- **Retention of Blue-Collar Worker 蓝领工人的保留**
  - The increasingly serious “migrant workers” shortage reflected how difficult recruiting blue-collar workers had become and how critical retaining them was. Survey results showed two mainstream blue-collar worker retention measures: 1) raising base salary, cited by 81% of companies, and 2) improving working conditions, cited by 54% of companies.
  - 日益严重的“农民工短缺”现象，不仅使蓝领工人的招聘变得非常困难，而且反映了现有蓝领工人的保留工作尤其重要。调研显示，提高蓝领工人的基本工资水平（81%公司）与改善蓝领工人的工作环境（54%公司）已成为最主流的蓝领工人保留措施。

- **Compensation Practice 薪酬实践 / Benefit Practice 福利实践**
  - A retention bonus, given upon completion of a certain contract length in the same company, is the most popular and effective compensation retention measure. Over 40% of companies were implementing this measure in 2010, followed by stocks options and equity-based long-term incentives.
  - 在各类薪酬保留措施中，员工保留奖金是目前最为流行并且具有最高有效性的措施，超过40%的公司正在实施。其次是股票和期权类长期激励。
  - Among currently available employee benefit plans, education assistance and car benefits were implemented by more than half of the surveyed companies, followed by housing benefits (adopted by nearly one-third). The top 3 most effective benefit plans, validated by the majority of survey respondents were: 1) flexible benefits, 2) high-end medical benefits, and 3) car benefits.
  - 从目前的福利措施来看，超过半数的公司实施教育资助计划和用车福利，约有三分之一的公司采取住房类福利措施。从有效性的角度来看，被最多的公司所认可的依次是弹性福利计划、高端医疗福利、用车福利。

- **Wealth Benefit Plan 财富类福利计划**
  - Among companies currently implementing wealth benefit plans, half invested less than 5% of the total cost of employee base salaries. One-third invested 5%-10% of the total cost of employee base salaries. Among available wealth benefit plans, the most representative ones were enterprise annuities and savings plans.
  - 在目前实施财富类福利计划的公司中，半数公司在这方面的投资低于其基本工资总成本的5%，三分之一的公司投资比例是在基本工资总成本的5%-10%。财富类计划中，最具有代表性的为企业年金和储蓄计划。

- **International Assignment 海外工作派遣**
  - 43% of companies considered 1-2 years as the ideal service length for an international assignment, which is also most effect in talent retention. When the service length exceeds 2 years, employee willingness diminishes.
  - 43%的公司认为，海外派遣1-2年是最佳时间段，对员工的保留效果也最好。当海外派遣超过2年，很多员工的意愿就会降低。
2010 – Q3

- **High-end Medical Benefits** 高端医疗福利
  - A recently introduced benefit measure, high-end medical benefits attracted much attention from HR managers and won recognition for their effectiveness in talent retention. Among companies already offering high-end medical benefits, 45% of estimated the average annual cost per employee at more than 15,000 RMB.
  - 作为新近引入的福利措施，高端医疗计划逐步受到了人力资源管理者的关系，并在保留人才的效果上得到了认可。实施高端医疗福利的公司有45%表示年人均成本超过了15,000RMB。

- **Flexible Benefit Plan** 弹性福利
  - Survey results showed that flexible benefits were most effective in retaining different types of employees and satisfying their varied needs. 83% of companies held these views. Additionally, 75% of companies believed they could maximize the value of flexible benefits and enhance talent retention under a controlled budget.
  - 调研显示人才保留有效性最高的措施是弹性福利，其最大优点就在于可以满足不同类型员工的各类需求，83%的公司持有这样的观点。有75%的公司认为，弹性福利能够在可控的成本下，实现福利价值的最大化，从而推动人才保留工作。

- **Career Development Practices** 职业发展实践 / Promotion 晋升
  - More than 50% of companies had adopted systematic and formally documented career development plans. Nearly 30% of intended to adopt such plans in the near future. Among talent retention measures, international assignment was widely validated as the most effective.
  - 制定正式的、有体系的、成文的职业生涯发展计划，已经被超过半数的公司所采用，另有近30%的公司计划在近期实施。相对来说，海外工作派遣在人才保留的效果上受到最多的认可。
  - Survey results showed that managers took an average of 3.3 years to get promoted to the next career level. Professional-level employees took an average of 2.5 years. General staff took an average of 2.2 years. 73% of companies considered offering promotion with a higher salary most conducive to talent retention.
  - 调研结果显示，对于管理人员来说，晋升到上一级别平均需要3.3年；对于专业人员来讲，晋升到上一级别平均需要2.5年；而对于普通员工来说，则平均需要2.2年。有73%的公司认为，加大晋升后的薪资涨幅对人才保留最具有推动作用。

- **Supporting Mechanism Practices** 支持机制实践
  - Non-monetary rewards and recognition measures had become popular ways of encouraging and retaining employees, with more than 60% of companies already adopting them. More than 50% had launched some type of leadership development program, while nearly one-third planned to implement it in the near future.
  - “非物质奖励”已经成为较为普通的激励和保留员工的做法，超过六成的公司已经实施了该项措施。超过半数的公司实施了领导力发展项目，同时有近三成的公司计划在近期实施这一项目。
2010 – Q4

- **Recruitment Plan 新员工招聘计划**
  - In Q4 2010, 86% of the surveyed companies planned to hire employees. 56% expected to raise the number of campus recruits from 2009. 42% intended to target colleges or vocational schools to find new hires. High Tech enjoyed the highest new hire rate of 7.3%. For other industries, the average new hire rates ranged between 3% and 6%.
  - 第四季度有86%的公司表示他们将会招聘新员工。56%的公司表示他们在2010年在校招聘的人数肯定会高于2009年。有42%的公司表明他们在本季度进驻各类高校或职业学校开展新员工招聘工作。高科技行业的新员工招聘率为7.3%，其他各行业新员工的平均招聘率在3%-6%间。

- **Off-Cycle Salary Review in 2010 年中加薪**
  - As the first year of economic recovery, 2010 was also the year of intense “talent wars.” Survey results indicated that 51% of the surveyed companies increased employee salaries. Among these companies, 30% were setting a precedent by conducting a mid-year salary review. The average percent of employees receiving a salary increase was 50.5%. In addition to implementing more frequent salary increases, some companies also increased salary increments upon employee promotion. In this survey, 13% of survey participants indicated that the actual cost of promotion increases in 2010 had exceeded the budget set at the beginning of the year.
  - 2010年是经济危机后的第一年，也是人才争夺异常激烈的一年。51%的公司在年中进行了薪资增长，其中有30%的公司是改变过去的做法，在年中破例增加了这样一次薪资调整，薪资增长授予的员工比例的平均值为50.5%。除了增加薪资增长的频率之外，一些公司还加大了对员工晋升后的加薪力度。有13%的公司表明，今年的员工晋升的加薪成本已经超出了年初的预算。

- **The Effect of Minimum Wage Increases 最低工资标准提高后的影响**
  - In 2010 nearly all the provinces in China raised their local minimum wage standards, with an average increase rate of 22.9%. Blue-collar workers were the most direct beneficiaries. Consequently, 49% of companies saw an increase in workforce compensation cost. 11% reported an increase of 10%-20%. 5% reported an increase of 20%-30%.
  - 2010年中国几乎所有的省都调高了当地的最低工资标准，各省增幅平均值为22.9%。调整的最直接受益群体是蓝领工人。49%的公司表示由于最低工资标准的提升导致企业用工成本的增加。其中11%的公司表示，用工成本增加了10%-20%，有5%的公司表示增加了20%-30%。

  - In response to the upward adjustment in minimum wage and employees’ higher expectation for benefits, 69% of survey participants directly focused on raising employee base salary. More than 50% of companies also tried to offer more benefits to improve employee compensation packages. It is worth noting that 3% of companies felt pressured to consider relocating to lower cost areas.
  - 针对各地最低工资标准的提高以及员工期望的不断上升，大部分公司（69%）都直接着手提高本公司的基本工资水平。另外有半数公司不仅仅从薪资的角度来回应员工的诉求，也从福利的角度来提升员工的待遇。值得注意的是，有3%的公司针对所在地较高的最低工资标准，已经在考虑要把公司迁往其它工资水平较低的地区了。
2010 – Q4

• HR Staff Ratio HR占总员工比例
  The average HR staff vs. total staff ratio was 2.1%, i.e., for every 100 employees, 2.1 HR employees were assigned. HR staff ratio varied greatly from industry to industry, from 1.5% in High-Tech to 4.2% in the Energy industry. However, workforce size was the primary factor in determining HR staff ratio, rather than the type of industry. In general, HR staff ratio decreases with the expansion of workforce as internal organizational efficiency increases.
  目前企业在HR人员的配置平均为2.1%，即每一百名员工配置2.1名HR人员。各个行业的HR配置跨度很大，从高科技行业的1.5%到能源行业的4.2%，但HR人员的占比主要是与企业的人员规模有关，与行业的因素关联较小。一般来说，公司规模越大，这个比例就越小。

• Wealth Benefit Plan 财富类留才计划
  More companies started to adopt wealth management planning, an increasingly popular method of retaining key talents. 41% of the surveyed companies offered supplementary housing fund; 20% provided commercial group supplementary pension insurance. Companies normally allowed supplementary housing funds to be deducted before tax as part of employee salary or part of employee benefits.
  由于在保留人才方面的作用越来越受到关注，财富类的福利计划被越来越多的公司所采用：41%的公司实施了补充住房公积金，20%的公司采取了团体商业补充养老保险。公司在实施补充住房公积金时的缴税方式主要是合并在员工工资的一部分或员工福利的一部分，税前列支。

• Sales Employee Incentives 销售人员的激励
  Sales volume (by RMB), accounts receivable collection and sales volume growth rate (by RMB) are most frequently used quantitative KPIs for first-line sales. Consumer satisfaction and customer retention are most widely used qualitative KPIs. Due to fierce market competition, 41% of companies performed annual updates of sales objectives. 25% of performed irregular updates. Sales staff is an employee group with a high turnover rate. More than 50% of companies considered recruiting and retaining sales personnel their biggest challenge.
  一线销售人员的定量指标，主要是总销量（按金额计算）、应收账款回收情况、销售额的增长率（按金额计算），采用最多的定性考核指标是客户满意度和客户保有情况。由于市场竞争的激烈，有41%的公司对销售指标进行年度更新，不定期更新的公司比例达到了25%。随着销售人员的频繁跳槽，有过半数的公司表示，销售人员的招聘和保留是他们最大的挑战。
**College Graduate Starting Salary 毕业生起薪**

In 2011 Hi-Tech industry’s bachelor’s/master’s/doctrate degree holders earned higher starting salary than graduates in other industries. In recent years, the average starting pay for management trainees—a group receiving much attention—reached an annual average salary of more than 70,000 RMB, exceeding that of graduates with master’s degrees in the same period. By region, in Tier-1 cities college graduate starting salaries in Beijing and Shanghai were relatively comparable, while greater differences existed in the Guangdong region.

**Year-End Bonus 年终奖**

Survey results showed that 90% of companies planned to give year-end bonuses in 2010, the highest affirmative response rate received by China Monitor surveys since the economic crisis began. In addition, 39% of companies expected the actual year-end bonus total in 2010 to exceed their original budgets, a nearly 20% increase in companies numbers from the same period in the previous year. These figures illustrated that the majority of enterprises had weathered the storm of the economic crisis, and that they were ready to share hard-earned profit rewards from 2010 with their employees.

**The Impact of CPI CPI所带来的影响**

15% of companies had adjusted employee salaries, benefits, or subsidies in response to CPI increases. 36% were making adjustments, and 26% stated clearly that they would make no adjustment. Among companies that had already made adjustments or were in the processing of doing so, 81% considered salary adjustment a priority.

**HR Budget HR预算**

In 2011 over 50% of companies increased their budget for training and recruitment. 36% planned to increase the budget for out-sourcing and consulting. The training costs invested in managers and professionals were 6.3 times and 2.7 times, respectively, more than blue-collar employees. Due to the relatively high turnover rate among blue-collar workers, many enterprises had plans to allocate more training resources to improve their skills and support their career development.

2011年高科技行业的本科，硕士及博士毕业生的起薪均领先其他行业。而近些年备受关注的管理培训生的年薪平均值超过7万元，也超过了同期硕士毕业生的平均年薪。从地域上看，一线城市中，北京和上海地区毕业生起薪比较接近，而广东地区还存在差距。
2011 – Q1

- **Employer’s Liability Insurance 雇主责任险**
  - 54% of companies had purchased employer’s liability insurance, while 39% had not. Among companies already insured, 49% reported having received insurance payout from insurance providers for employee medical expenses accrued during 2010 workplace accidents.
  - 本次调研中，有54%的公司已经投保雇主责任险，而39%的公司没有投保。而这些投保的公司中，2010年发生工伤事故后，有49%的公司表示得到了保险公司对被保险人医疗费用的赔付。

- **Benefits 福利**
  - In 2011, benefits budget increased by an average of 11.1%. Compared by industry, the highest increase occurred in Pharma and Medical Devices (16.4%), then Consumer (12.8%), followed by Real Estate (11.5%). Companies aimed to improve benefits in the following areas: work/life balance (30%), long-term incentives (30%), allowances and subsidies (27%), training and development (26%).
  - 2011年福利预算总成本增长比率平均值为11.1%。其中医药及医疗器械行业增长比率最高，为16.4%，其次是消费品行业（12.8%）、房地产行业（11.5%）。公司最希望增加或改善的福利为：工作/生活平衡（30%公司）、长期激励（30%公司）、津贴和补助（27%公司）、培训和发展（26%公司）。

- **April Snapshot: Attraction and Retention of Blue-Collar Workers 四月快速调研：蓝领工人的吸引和保留**
  - Nearly 80% of companies reported difficulties in recruiting blue-collar workers, the main reason being lack of means to adequately meet their salary and benefits expectations. As a result, employers turned heavily to employee referrals and labor markets.
  - 近80%的公司存在蓝领工人“招聘难”问题，没法满足员工对薪酬福利的期望是出现“招聘难”现象的主要原因。鼓励员工推荐、在劳动力市场招聘是公司采取最多的解决该问题的措施。
  - Nearly 72% of companies reported difficulties in retaining blue-collar workers. Worker demands included: higher base salary, more benefits and subsidies as well as workplace improvement. In response, 55% companies raised employee base pay. In Electronics industries, blue-collar workers received an average base pay increase of 12.1%; some companies increased blue-collar salary by more than 15%. 90% of companies offered meal allowances. Meal allowance amount per employee per meal averaged 10 RMB in Northern and Eastern China, and 8 RMB in Southern China. 20% of companies offered a housing allowance of about 200 RMB per employee per month.
  - 近72%的公司存在“挽留难”问题。蓝领工人的需求主要集中在增加基本工资、其他津贴或福利以及改善工作环境上。针对这一问题，55%公司增加了蓝领工人的基本工资；电子行业蓝领工人平均加薪率为12.1%，有些公司甚至超过15%。90%的公司为员工提供工作餐，餐费标准为：华北和华东地区平均每人每次10元，华南地区平均每人每次8元。20%的公司每月为员工提供租房补贴，补贴金额在每月200元左右。
  - The new blue-collar generation had begun to focus on career development opportunities. Nearly 50% of companies had also started programs to address their needs.
  - 新生代工人群体开始关注发展机会。接近一半的公司开始为蓝领工人提供职业发展规划。
2011 – Q2/Q3

**Employer Perspective 雇主角度**

More than 50% of survey participants broadly defined total compensation to include salary, benefits, career development and work/life balance. Key talent attraction/retention was cited as the main driver for this total compensation strategy (99% of companies considered it an important driver, while 76% considered it an effective driver). Survey participants showed great interest in “gathering relevant market data” when citing their own challenges in devising a total compensation strategy. To achieve success, 79% of respondents cited “senior management approval, support, and participation” as very important. However, only 18% would rate their own efforts as “very successful.”

Most foreign invested enterprises (FIEs) have relatively clear policies on targeting comparable markets and defining their own compensation strategies. Local companies appear to have less clarity. For FIEs, policies on “job grading system,” “career development,” and “long-term incentives” hold more or less global or regional consistency. Local HR managers take into account domestic market trends when making decisions on “supplementary benefits,” “comparable salary markets,” and “non-cash rewards.” The majority of companies adopt a “market median pay” policy and a broad band salary structure (9-20 grades). The most common salary range width is 40%-60% (blue-collar workers excluded). The higher the job level, the bigger the width increases.

大多数外商投资企业对于目标对比市场和目标定位有较为清晰的政策，而中资企业在这方面显得较为缺乏。 “市场中位值” 是最为普遍的市场定位。对于外商投资企业来说，“职级体系”，“职业发展” 和“长期激励”有较高的全球一致性或区域一致性。“补充福利”、“薪资的比对市场”和“非现金奖励”往往是根据市场情况进行制定的。此外，大多数公司在制定薪资架构时选择宽级结构（9-20个薪资等级）。40%-60%是除白领工人外的其他层级员工最为常见的薪资幅宽。职位等级越高，薪资幅宽越大。

**Employee Perspective 员工角度**

When presenting total compensation strategies to employees, more than 70% of companies aimed to create a total compensation system to support business operations. 38% focused more on the “salary” component when communication with their employees. Line managers are in key positions to help employees understand compensation strategies. However, only one-third of survey respondents felt that their line managers were able to “fully understand” and “fully support” the total compensation strategies in their respective companies.

在与员工进行全面薪酬策略沟通时，七成以上的公司正致力于创造出全面薪酬体系来支撑组织业务的运作，并向员工沟通他们的薪酬是如何制定的。38%的公司注重以“薪资”为重点的沟通。一线管理者在帮助其员工了解薪酬策略方面起到了关键和特殊的作用。然而，只有三分之一的公司认为他们公司的业务经理是“完全了解”、“完全支持”公司的全面薪酬策略。
2011 – Q2/Q3

- When addressing topics such as “compensation strategies and principles,” “short-term incentives,” and “supplementary benefits,” 30% of companies preferred communication via “employee group meetings,” while 20% preferred “written documents.” For discussion on “career development” and other individual programs, 43% of companies considered “one-on-one meetings” most effective.
- In “薪酬策略与原则”、“短期激励”和“补充福利”等报酬项目上的沟通，约30%和20%的公司把“员工大会”和“书面文件”作为首要渠道。而在“职业发展”等个人化项目方面，43%的公司认为“单独会议”是最有效的。

- **External Market Perspective 外部市场角度**

- More than 70% of companies performed internal and external analysis when deciding on and revising total compensation programs. In seeking management-level talent, over 70% of foreign invested enterprises and nearly 90% of Chinese enterprises opted for a “build-from-within” strategy. When practicing a “buy-from-the-market” strategy, 57% of all companies cited “lack of qualified candidates” as their biggest challenge. To attract and retain talent, HR measures focused on cash-related compensation programs (base salary, short-term incentives, guaranteed allowances) and career development.

- 七成以上的公司表示，在做任何全面报酬的决策或修改报酬计划前，他们会进行内部分析和外部分析。在管理层的人员选用上，七成以上的外商投资企业和近九成的中资企业把“内部培养”作为首选人才战略。而在实施“外部引进”人才战略时，57%的公司将“缺少合格的候选人”列为他们所面临的最大的挑战。吸引人才的首项措施仍主要是现金相关的报酬项目（包括基本薪资、短期激励、固定津贴）和职业发展。

- **Cost Perspective 成本角度**

- In the past 12 months, 56% of the surveyed companies spent a higher percentage of total revenue on employee total compensation programs, while 37% kept the same percentage. For the next 5 years, 19% of respondents predicted that short-term incentive budget would most likely undergo revision. 14% worried more about the stability of base pay, while 10% about the viability of long-term incentives.

- Workforce segmentation is key in allocating resources to employees who bring more value to their employers. 98% of survey participants maintained workforce segments in their total compensation programs. Segmenting by job level was the most common practice among 90% of employers, followed by functional departments (57%). Nearly all the Chinese companies (97%) practiced segmentation by job level.

- 在过去12个月中，有56%的公司在全面报酬上的投入占公司销售收入的百分比有所增加，而37%的公司表示这一比例保持不变。所有调研公司参与部分的反馈来看，19%的公司认为短期激励在未来五年内变动的可能性最大。此外，分别有14%的公司和10%的公司表示对基本薪资和长期激励在今后五年内的稳定性比较担忧。

- 细分报酬项目可以帮助企业有效的分配资源，使那些给企业带来更多价值的员工获得更多的投资。98%的参与调研公司对他们的全面报酬项目进行了细分。根据职位等级进行报酬细分是最常用的方法，有90%的参与调研公司选择使用这种方法。其次，是根据职能部门进行细分，有57%的公司使用。几乎所有的中资企业（97%）使用职位等级来细分全面报酬。
2011 – Q4

- **Business Performance 经营业绩**
  - 79% of survey participants expected their 2011 business earnings to meet or exceed sales targets set in the beginning of the year. Nearly 30% expected an increase of more than 15%. Chemical, Pharma & MD industries saw exceptional business performance. 73% of companies intended to increase headcount in 2012, mainly in sales and marketing. Meanwhile, 45% planned to hire more R&D staff, an indicator that more companies would focus more on product innovation.
  - 79%的参与者公司表示预计全年2011年经营业绩将达到或超过年初设定的目标，近三成公司表示同比增长15%以上。化工、医药和医疗器械行业表现优异。此外，73%的公司表示会在2012年增加员工人数，销售和市场部门是人员增长的主要部门；45%的公司会增加研发部门的员工人数，这意味着更多的公司将加大在产品创新上的力度。

- **Personal Income Tax 个人所得税**
  - On September 1, 2011, China’s revised individual income tax law went into effect, requiring higher taxes from workers with a monthly personal income above 38,600 RMB (after insurance and benefits cost deduction). A small number of companies proactively increased employee base pay or increase allowances/subsidies to keep their net income the same. About 15% of companies that had not taken action indicated that they would consider salary adjustment in 2012 for employees targeted by the new tax law.
  - 2011年9月1日，修改后的个人所得税法及其实施条例正式实施。扣除三险一金后月收入超过38600元的公民，调整后需要多纳税。有少数公司对于个税调整做出了积极的响应，适当增加了基本工资以保持税后收入不变，或增加了津贴。尚未有所变化的公司中，有15%的公司表示会在2012的薪资调整中考虑个税对于特定人群的影响。

- **Trade Union 工会经费**
  - In 2010, Beijing, Hangzhou and other cities announced details on collecting payment for union funds. By 2011, 71% of companies were making the required contribution in an amount equally 2% of total worker wages to their local tax bureaus as union funds and cash reserve.
  - 2010年北京、杭州等城市已下发通知落实工会经费的缴纳细则。71%的公司已经根据规定向当地税务机关按照全部职工工资总额的2%缴纳工会经费和筹备金。
2011 – Q4

• **One Child Allowance** 独生子女费
  
  In 2011 Shanghai revised its “Regulation of Family Planning Subsidy,” raising one-child allowance from 2.5 RMB to 30 RMB per month. Survey results showed that more than 60% of companies had not paid out one-child allowances before the official rate adjustment. After the adjustment, 35% of companies updated their HR policies, either by adding the one-child allowance or by increasing an existing allowance. These companies also retroactively paid out allowances due from January 1, 2011, per Regulation.

• **October Snapshot: Foreigners’ Participation in China’s Social Insurance Scheme**
  
  The “Interim Measures for Participation in Social Insurance of Foreigners Employed in China” took effect in October, 2011, requiring non-Chinese employees to participate in all 5 types of China’s social insurance contributions. For employers, rising costs and communication with foreign employees were two major concerns.

  2011年10月起施行的《在中国境内就业的外国人参加社会保险暂行办法》规定外籍员工应该参加当前全部五项社会保险。新规定实施后，企业用工成本增加、与外籍员工和管理成层的沟通工作是企业最关心的问题。

  In response to the new regulation, 84% of companies had no plan to adjust their existing remuneration/benefit policies, while 44% had policy review plans. 60%-70% expected the cost increase to fall below 10% of foreign employees’ total pay. About 50% expressed concern over potential impact on foreigners’ willingness to come work in China.

  84%的参加调研公司并不计划在新规实施后对现行薪酬福利政策进行调整，但其中44%表示他们会重新评估现有政策。60%-70%的参加调研公司预计因此新规导致的社保直接成本增加将会低于外籍员工整体薪酬的10%。大约一半的公司担忧新规实施会影响外籍员工来华积极性。

  For locally hired foreigners, 53% of the surveyed companies intended to let foreign employees bear their own social insurance costs. But for expatriate employees, about 60% of companies were open to absorbing their individual social insurance premiums.

  对于本地雇佣的外籍员工，53%的参加调研公司表示他们计划让员工承担自己的缴费部分，但对于海外派遣的员工，60%的参加调研公司仍在考虑是否企业承担员工个人的社会保险缴费。
2012 – Q1

• **Business Performance 经营业绩**
  - In 2011, about 65% of companies saw an increase in sales revenue by over 5% from the previous year. In 2012, about 70% of companies planned to further increase revenue by over 5%. 38% of respondents were working to set up new branches in 2012 and 2013, primarily in Tier-2 cities with a focus on the Auto, Chemical, Industrial and Machinery sectors.
  - In 2011, about 65% of companies saw an increase in sales revenue by over 5%, whereas in 2012, about 70% of companies planned to further increase revenue by over 5%. 38% of respondents were working to set up new branches in 2012 and 2013, primarily in Tier-2 cities with a focus on the Auto, Chemical, Industrial and Machinery sectors.

• **Year-End Bonus 年终奖金**
  - On the whole, 2011 employee year-end bonus averaged 16.8% of employee’s annual base pay. This figure was highest in the Auto industry (19.5%) and Pharma & Medical Devices industries (19.1%). Retail showed a relatively low 11.6%. 1/5 of companies saw an average increase of 16% in the actual bonus amount compared with the target amount. These increases were especially impressive in Auto (26.0%) and Hi-tech (23.4%).
  - 2011年员工年终奖金占年基本工资的16.8%；汽车、医药及医疗器械行业的员工年终奖金占年基本工资的比例领先于其他行业，比例分别为19.5%和19.1%；零售行业则较低，比例为11.6%。五分之一的公司实际年终奖金额高于目标奖金额，平均增加值为16%；尤其是在汽车和高科技行业，实际年终奖金额高于目标奖金额度26.0%和23.4%。

• **Hiring Plan 招聘计划**
  - 86% survey participants planned to increase headcount in 2012, similar in proportion as in 2011. In 2012 the average headcount growth rate was 13.8%, with a focus on manufacturing, sales, R&D functions. The Auto industry projected 24.7%, the highest headcount increase rate among all industries. 70% of companies intended to recruit new fresh graduates in 2012, with local Chinese companies and joint ventures showing relatively stronger hiring intentions.
  - 86% of the company表示将在2012年增加人员编制，与2011年基本持平。2012年平均人数增长率为13.8%，人员编制的增长最多的是制造、销售和研发部门。汽车行业的人员编制增长率为24.7%，增幅在各行业中最高。70%的公司在2012年招聘应届毕业生，中国本土企业和合资企业招聘意愿更强。

• **Special Benefits 特殊福利计划**
  - 53% of companies indicated that special benefit programs were already in place for selected employees, with hi-end medical insurance and additional life insurance being the most popular choices. Survey respondents cited high cost (due to relatively small company size) as the main difficulty in offering special benefits.
  - 53%的公司表示已经为企业的部分人群提供特殊福利待遇，最常见的项目是高端医疗保险、额外人身保险。调研公司表示，提供特殊福利计划的主要困难是由于团体规模小，福利成本相对较高。
**2012 – Q2**

- **Labor Contract Duration 劳动合同期限**
  - 77% of survey participants applied the same contract length to all the newly hired employees. With the exception of blue-collar workers, the majority of companies offered 3-year or longer contracts to employees at all levels. 40% of companies offered 2-year contracts to regular blue-collar staff, while 29% offered three years or longer.
  - 77%的公司与所有新员工签订相同期限的劳动合同。除蓝领工人之外，多数公司为所有职级的员工提供三年及三年以上的合同期限。40%的公司与正式雇佣的蓝领工人签订两年的劳动合同，29%的公司提供三年及三年以上的合同期限。

- **Interns pay 实习生工资**
  - 82% survey participants recruited interns. Among them, 45% compensated interns with an average pay of 90 RMB per day. Intern pay increased with rise in education level. The most common benefits were meal allowance (70%) and commercial insurance (63%). 62% of companies were open to hiring non-local interns; among these companies, over half would provide extra housing and travel subsidies.
  - 82%的公司雇佣实习生；其中的45%公司按日计算实习生工资，整体平均值约为￥90/天，工资金额随实习生的学历递增。工作餐和商业保险是市场上最为常见的实习生福利，提供两项福利的公司分别占70%和63%。62%的公司会雇佣外地院校的实习生，其中半数的公司会额外提供宿舍，以及交通费用报销。

- **Training 培训**
  - Employee training budget for 2012 was on average 2.9% of all employees’ base salary. Management and executive level employees enjoyed 30% of company training budget, while accounting for only 13.3% of total workforce. 54% of survey participants determined employee eligibility by following centralized HR planning, while 39% relied on recommendation from line managers.
  - 2012年平均员工培训预算占公司内全体员工基本工资的2.9%。管理层及管理层以上的职级享有公司30%的培训预算，然而根据美世的调研，对应员工群体仅占公司内所有全职员工人数的13.3%。54%的公司主要根据人力资源部门的统一规划确定员工培训的资格，另一重要标准是直线经理的推荐，占39%。

- **Maternity Allowance 生育津贴**
  - Effective July 1, 2011, the Social Insurance Law of the People’s Republic of China revised the criteria for calculating/disbursing maternity allowances. Since then, an eligible employee’s maternity allowance equals the average monthly salary of all the employees of her employer in the previous year. 42% of companies predicated a decrease in maternity allowance costs, while 42% were not yet sure about the financial impact.
  - 2011年7月生效的社会保险法修改了职工生育津贴的计发标准，从“员工生育或者流产当月城镇养老保险费缴费基数”更改为“员工生育或者流产当月所在用人单位上一年度职工的月平均工资”。现阶段42%公司预计其发放生育津贴费用将减少，另42%对所产生的影响尚不确定。
Incentives plans 激励计划
The overall target variable bonus for 2012 averaged 19.8% of employee’s annual base salary, slightly lower than the actual percentage figure for 2011 (21.9%). For sales incentive bonus calculation, the Pharma & Medical Devices industry showed more bias with an incentive bonus budget averaging 59% of employee’s annual base salary, followed by High Tech and the Consumer industry. Among various types of long-term incentive plans, the most common included 1) restricted shares/share units, 2) stock/share options, and 3) long-term cash.

Flexible benefits plan 弹性福利计划
On the whole, flexible benefit plans were not prevalent on the market with an adoption rate of only 7.3% across industries. Under flexible benefit plans, the most popular options included health benefits, commercial insurance benefits, annual leave and various kinds of cash vouchers. These options showed an adoption rate of over 50% in companies already providing flexible benefit plans.

August Snapshot: Shanghai Minimum Wage 八月快速调研：上海最低工资标准
In 2012, companies using a wage scale above the minimum wage in Shanghai accounted for 30%, an increase of 5% compared with 2011. Among companies whose lowest wage level exceeded the city’s minimum wage standards, the median wage was 1,910 RMB/month, up by 17% from 2011. 33% of companies hired hourly employees, and 7% of these companies offered an hourly wage greater than the minimum hourly wage in Shanghai. The median wage was 27.5 RMB/hour.

2012年本公司最低工资高于上海市最低工资标准的公司占比是30%，比2011年增加5%。本公司最低工资高于上海市最低工资标准的公司，其最低工资的中位值为1910元，比2011年上涨17%。33%的公司雇佣适用小时工资制的员工，7%的公司小时工资高于上海市最低小时工资标准，中位值为27.5元。
2012 – Q4

- **Business Performance 经营业绩**
  - 63% of companies expected to meet their business performance target in 2012. In the same period last year, 79% had expected to achieve their 2011 revenue target. As a result of companies becoming more prudent about headcount expansion, the average headcount growth rate in Q4 fell to 2.5% from 3.7% in Q3. 73% of survey participants planned to keep their existing organization size in 2013. Nearly 1/5 of companies expected to set up new branches in China, a decrease in proportion compared to the estimated 38% from Q1.
  - 63% of companies expected to meet their business performance target in 2012. In the same period last year, 79% had expected to achieve their 2011 revenue target. As a result of companies becoming more prudent about headcount expansion, the average headcount growth rate in Q4 fell to 2.5% from 3.7% in Q3. 73% of survey participants planned to keep their existing organization size in 2013. Nearly 1/5 of companies expected to set up new branches in China, a decrease in proportion compared to the estimated 38% from Q1.

- **Variable Pay 浮动薪酬**
  - Overall variable bonus in 2012 averaged 18% of employee’s annual base pay, while sales incentive bonus averaged 22%. More than 1/4 of survey participants planned to cut their actual total bonus pool. The Pharma and Medical Devices industry enjoyed the biggest variable bonus and sales incentive bonus, averaging 25% and 33% of employee’s annual base salary, respectively.
  - 2012年整体浮动奖金、销售激励的比例平均分别为员工年度基本工资的18%和22%。和之前的预算相比，有超过四分之一的公司表示他们将减少实际发放的奖金总额。按行业划分，医药及医疗器械行业的浮动奖金和销售激励仍然位居各行业之首，分别为25%和33%。

- **Meal & Transportation Cash Allowance 餐补现金津贴和交通现金津贴**
  - For general staff, more than 1/3 of companies offered meal cash allowances averaging 15 RMB per day or 337 per month. The allowance budget for blue-collar workers averaged less at 12 RMB per day or 270 RMB per month. 32% of companies provided transportation cash allowances averaging 17 RMB per day or 372 RMB per month for general staff, and 6 RMB per day and 180 RMB per month for blue-collar workers. More than 80% of companies bore the individual income tax burden of meal & transportation allowances. Compared by enterprise ownership type, more Chinese companies provided meal and transportation cash allowances.
  - 超过三分之一的公司为员工提供餐补现金津贴，一般员工的餐补现金津贴平均预算为每天15元或每月337元；蓝领工人的预算略低，平均为每天12元或每月270元。32%的公司为员工提供交通现金津贴，一般员工的交通现金津贴预算平均为每天17元或每月372元，蓝领工人则为每天6元和每月180元。超过八成的公司承担因餐补津贴和交通津贴所产生的个人所得税。按照企业所有制类型划分，提供餐补现金津贴和交通现金津贴的中国本地企业相对更多。
• **Social Insurance Coverage 社保缴纳**
  7% of companies absorbed the cost of their employees’ individual social security premiums covering basic medical insurance, basic pension, unemployment insurance, and public housing fund. 55% of companies started making employer’s share of their non-Chinese employees’ social insurance contribution. Among these companies, nearly 40% planned to pay their international staff’s individual share of social insurance contribution as well, and nearly 70% would cover the individual share of their locally hired foreign employees.

  7%的公司为员工承担社保的个人缴费部分，包括基本医疗保险、基本养老保险、失业保险以及住房公积金的个人缴纳部分。55%的公司已经开始为外籍或港澳台员工缴纳中国社保，这些公司中的近四成会为其国际派遣员工承担社保的个人缴费部分，近七成会为本地雇佣的外籍员工承担社保的个人缴费部分。

• **High-end Medical Plan 高端医疗方案**
  Nearly 1/3 of survey participants provided high-end medical programs, mainly for non-Chinese employees and Chinese executives. Among companies that planned to implement high-end medical plans in the near future, 33% would start to pay attention to key talents.

  近三分之一的公司为其部分员工提供高端医疗方案。其方案将主要适用于外籍员工及中国高管层。在那些计划在未来几年内为员工提供高端医疗方案的公司中，有33%的公司也开始关注企业内部的关键人才群体。

• **Executive Pension Plan 高管养老金计划**
  8% of survey participants already had executive pension plans in place, and 6% intended to roll out these plans within three years. Many of the companies already providing executive pension plans were leaders in their respective industries. For most companies, the lack of tax advantage was the primary hindrance in setting up executive pension plans.

  在参与调研的公司中，有8%的公司已经提供高管养老金，同时有6%的机构计划在未来三年内提供该项福利。提供高管养老金计划的往往都是行业内的龙头企业。阻碍公司建立高管养老金计划的主要原因是缺乏合理的避税方式。

• **Retail Outlook 零售业纵览**
  63% of the 22 retail companies participating in the survey expected to successfully complete their business targets. 50% had expansion plans across China, including inland or western regions. At the same time, some businesses felt pressured to downsize by closing storefronts and streamlining, etc., thus slowing retail store openings on the whole in the process. In Tier-2 cities, more companies chose to support local market expansion via domestic dispatch.

  接受调研的22家零售公司中，预计顺利完成预设指标的公司比例为63%。一半的公司计划在中国扩张企业规模，并将进一步深入中部或西部地区。但与此同时，也有一些公司需要通过关闭门店、精简架构等方式调整现有的业务规模，零售业门店开张的速度也将放缓。在二线城市中，越来越多的公司正在通过国内派遣的方式，来支持本地市场的不断扩张。
2013 – Q1

• **Business Performance** 经营业绩
  Over 40% of survey participants felt positive about the prospect of achieving better business results and increasing HR budget in H1 2013. When adjusting HR budget, companies preferred to spend more on base salary and training & development. At the industry level, more than 70% of companies in the Pharma & Medical Device and Real Estate industries expected their business and financial performance to improve in H1 2013. Survey respondents were less optimistic in the Mechanical & Electronic, Chemical, and High Tech industries. Southern China cities still suffered a relatively high turnover rate (more than 30%) among blue-collar workers. Nearly half of survey participants in these cities claimed to have set a target voluntary turnover rate; among them, 78% hoped to keep their key talent turnover rate below 10%.

• **Hiring Plan** 招聘计划
  51% of companies planned to increase hiring, while 16% planned to reduce workforce size. Compared with hiring forecasts made in Q4 2012, the pace of actual hiring continued to slow in 2013.
  51%的公司计划增加2013年的员工编制，而有16%计划减少员工编制。与去年第四季度的预期相比，员工编制增速继续放缓。

• **Starting Pay** 毕业生起薪
  55% of survey participants intended to recruit fresh graduates in 2013. Among these companies, 1/3 planned to enlarge their campus recruiting scale. Compared by work function, new graduates hired into R&D departments received higher starting salaries. Graduates with advanced degrees enjoyed even more starting pay advantage.
  参与调研的公司中，55%计划在2013年招聘应届毕业生，其中近三分之一的公司会扩大校园招聘规模。相比其他部门，研发部门的应届毕业生们起薪更高，高学历毕业生的起薪优势更加明显。
• **Dispatched Employees 劳务派遣**
  • According to China’s revised labor contract law, effective July 1, 2013, dispatched workers shall be entitled to equal pay for equal work as regular employees. At present, 24% of employers applied the rule of “equal pay for equal work” when hiring dispatched employees. However, more than half of employers practiced differential treatment of dispatched employees in two or more HR procedures, especially in employee benefits. About 40% of companies expected higher labor cost to follow the new regulation.
  • 根据修改后的劳动合同法，自2013年7月1日起，劳务派遣员工将享有与正式员工同工同酬的权利。目前，24%的公司对劳务派遣员工实行“同工同酬”制度。超过半数的公司在两个或更多的人力资源领域区别对待劳务派遣员工，尤其是福利领域。40%的公司明确预估劳工成本会因此新政策的实施而增加。

• **Public Housing Fund 住房公积金**
  • 58% of survey participants adopted different contribution rates to employee public housing fund in different cities. Nearly 1/3 chose the statutory maximum contribution rate, while another 1/3 chose the statutory minimum contribution rate. 21% of companies applied the same contribution rate in different cities. Providing employees with housing allowances above the statutory minimum contribution amount was the most prevalent company approach.
  • 一方面，58%的公司在不同城市采用不同的住房公积金缴费比例。其中近三分之一的公司选择了当地政府规定的住房公积金的最高缴费比例，另有近三分之一的公司选择了当地政府规定的住房公积金的最低缴费比例。另一方面，21%的公司在不同的城市采用相同的住房公积金额缴费比例。通过住房津贴为员工提供超出政府规定部分的方法最为常见。
Domestic Transfer 国内派遣
38% of survey participants had a formal domestic transfer policy. In 2012, 5.2% of management employees and 4.6% of non-management employees accepted domestic transfer assignments. Mobility allowance was the most prevalent benefit for transferred employees on short-term assignments. More companies offered home visit and housing benefits to employees under long-term domestic transfer assignments.

Benefits Budget 福利预算
Compared with 2012, 96% of companies planned to maintain or increase their benefit budget (as percentage of employee’s base salary). Company budget for mandatory benefits averaged 33.2% of all employees’ base salary, and 8.0% for supplementary benefits. For executive talent attraction and retention, the most effective benefit programs included long-term incentives, high-end medical insurance, and flexible benefits. For key talents, long-term incentives, supplementary housing benefits and flexible benefits proved most effective.

Maternity Allowance 生育生活津贴
Half of the survey participants calculated maternity allowance according to the principle of “higher-level benefit”: paying either the company’s average employee monthly salary for the previous year or the individual employee’s monthly salary preceding her maternity leave, whichever is higher. More than 25% of companies had no maternity benefit coverage for second child born outside China’s one-child family planning policy. Among survey respondents who offered benefits to employees having a second child outside the one-child policy, 42% granted the legally required number of maternity leave days, while 25% provided the required maternity allowance.

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2013 – Q2

- **Utilization of Interns** 实习生
  - 73% of survey participants hired interns. Duration of internship varied from company to company; about 1/3 of hiring companies reported a duration of 3-6 months. 84% required their interns to pay their own income tax. 62% provided company meal or meal allowance, the most common benefit available to interns.

- **Training Budget 培训预算**
  - About half of survey participants intended to keep their 2013 training budget at the same level as 2012. Compared by industry, Real Estate, Consumer, and Auto invested more in training in 2013. While 1/3 of companies in the Pharma & Medical Device industry planned to cut training budget for 2013, their revised budget averaged 7.6% of all employees’ base salary, still higher compared to other industries.

- **May Snapshot: Attraction and Retention of Blue Collars** 五月快速调研：蓝领工人的吸引和保留
  - Half of survey participants would keep their blue-collar workforce size the same in the next 3 years. Recruiting blue-collar workers remained difficult--only 46% of employers accomplished their recruitment goals in 2012. The main difficulty lied in employers’ inabilities to meet in speedy fashion workers’ salary and benefit increase demands. Over 70% of companies emphasized the difficulty in recruiting technician.
  - Contractors made up 37% of formally hired blue-collar workers. Increasing cost had driven employers in many industries to seek labor resources in local and surrounding areas. In the highly stable Chemical and Pharma industries, more than 50% of companies preferred recruiting from local labor markets.
  - For blue-collar workers, annual bonus was reported to be the most prevalent form of cash incentive. Almost 20% of survey participants planned to increase allowances for Group/Shift leaders and highly skilled technicians.
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Policy Updates
中国人力资源政策动向
in Q1 2012

1. Social Insurance for Foreigners
外籍员工加入社保

2. Trade Union Fees
工会经费

3. Personal Income Tax
个人所得税

• “The Interim Measures for the Participation in Social Insurance of Foreigners Employed in China” was released on September 6, 2011 and came into effect on October 15, 2011. It legislated mandatory participation by foreign employees in all five types of China’s official social security insurances. However, as observed by Mercer, implementation practices vary by location.

• The Chinese government requires all legal entities to set up trade union and pay union fees on a monthly basis equal to 2% of all employees' monthly wages (Trade Union Law, 2004). Local tax bureaus started collecting union fees on July 1, 2010, according to the notice from the General Office of the People’s Government of Beijing Municipality (Jing Zheng Ban Han [2010] Notice No. 34).

• China’s revised personal income tax law came into effect on September 1, 2011, raising the monthly exemption threshold to 3,500 RMB and adjusting progressive tax rates ranging from 3% to 45% in a 7-bracket system. High-income earners (38,600/month and above) are subject to higher tax rates.

• 《在中国境内就业的外国人参加社会保险暂行办法》于2011年9月6日公布，并于2011年10月15日生效。该办法将在华就业的外籍人士纳入中国的社保体系，通过立法强制外籍员工缴纳所有五类社会保险的费用。然而美世观察到，在具体实施过程中，中国各个地区的实际操作办法并不一致。

• 中国政府正式要求所有的法人实体成立工会，并按月缴纳相当于全体员工月工资总额2%的费用，作为工会经费（工会法，2004年）。自2010年7月起，根据北京市人民政府办公厅（京政办函[2010]第34号公告）的通知，地方税务部门将按规范向企业收集工会经费。

• 修订的所得税法2011年9月1日正式生效。新法以3500元为起征点，实行7级累进税率，最低比例为3%，最高比例为45%。税法实施后，收入较高的员工（月收入人民币38,600及以上），实际需要缴纳更高的税费。
Policy Updates
中国人力资源政策动向
in Q2 2012

1. Maternity Allowance
生育津贴

- Effective July 1, 2011, the Social Insurance Law of the PRC changed the calculation and disbursement methods for maternity allowances, no longer adopting the pregnant employee’s basic urban pension insurance contribution. The new contribution base is her average monthly salary over the last calendar year.
- “Special Regulations Concerning the Labor Protection of Female Staff and Workers” went into effect on April 18, 2012, extending maternity leave from 90 days to 98 days in line with the standards of the International Labor Organization (ILO). The provisions clearly define maternity leave entitlement in the case of miscarriage: If a miscarriage occurs within the first four months of pregnancy, an employee is entitled to 15 maternity leave days; after the first four months, 42 days. References are made for the first time to female employee’s mental health issues as well as specific kinds of work employers are forbidden to assign to pregnant female workers.
- The Ministry of Human Resources and Social Security (MOHRSS) is drafting a proposal on flexible retirement age in anticipation of a coming demographic shock to the social security system. Simply raising the retirement age would make the job market tighter for young workers, so using a flexible retirement framework to defer the age for collecting a full pension is preferred. If the proposal passes, the retirement age – currently 60 for men and 50 for women – would be postponed to as late as 65 or later. There will be stakeholder consultations before the proposal is published.
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2. Special Regulations for Female Employees
女职工的劳保特别规定

3. Flexible Retirement Age
弹性退休年龄

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Policy Updates
中国人力资源政策动向
in Q3 2012

1. New Regulations on Work Permit for Foreigners 外籍工作许可证新规定

- A new exit and entry law that stipulates harsher punishments for foreigners who illegally enter, live or work in China took effect on July 1, 2013. According to the law, employers will be fined 10,000 RMB for every foreigner they illegally employ up to a maximum of 100,000 RMB.
- The Supreme People’s Court is drafting related documents to stipulate that foreigners working without a work permit will no longer be protected by labor laws, whether or not they are working under a labor contract.
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2. Tax-deferred Pension 个税递延型养老

- China might start a tax-deferred pension pilot program this year in Shanghai, after much anticipation since 2009. The exemption ceiling could reach 1,000 RMB/month, of which 700 RMB is for tax-free personal pension insurance and 300 RMB is to be exempted from corporate annual tax. A tax-deferred pension insurance is a kind of commercial pension insurance for which a proportion of the premium is paid by the insured before personal income tax deduction. After retirement, the insured can retroactively pay tax on the insurance amount collected.
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3. Critical Illness Insurance 大病医疗保险

- On August 30, 2012, China announced a decision to expand the coverage of the country’s healthcare insurance system to include the treatment of critical illnesses. The scheme would start out with pilot programs in a few provinces and target urban residents and rural residents rolled in the New Rural Cooperative Medical Scheme. Medical bills for critical illnesses would be covered by the medical insurance fund for urban residents or the New Rural Cooperative Medical System, without extra financial burden on individual patients.
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Dispatched Employee
勤劳派遣新规定

- Effective July 1, 2013, dispatched employees shall be entitled to “equal pay for equal work” as regular staff. Employers shall, pursuant to the regulation, apply the same labor remunerations distribution measures to dispatched employee and its regular staff holding similar positions. If an employer has not hired any regular staff for a similar position currently taken up by a dispatched employee, the labor remunerations payable to the dispatched employee shall be determined with reference to the market rates in the same location.

- Since 2013, 9 provinces or cities have raised their minimum monthly wage levels.
- 2013年以来，全国九个省市上调了最低工资标准。
Policy Updates
中国人力资源政策动向
in Q2 2013

1. China Releases Implementing Rules on Labor Dispatch Licensing 中国颁布《劳务派遣行政许可实施办法》

- The Measure is enacted in accordance with the new rules on labor dispatching stipulated in the “Decision on Revising the Labor Contract Law of the People’s Republic of China” issued by the Standing Committee of the National People’s Congress on December 28, 2012, which provides that no entities or individuals are allowed to engage in the labor dispatching business without an administrative license, and that applications for such licenses shall be filed with the relevant labor authorities.

- 2012年12月28日，第十一届全国人大常委会第三十次会议通过的《关于修改〈中华人民共和国劳动合同法〉的决定》明确规定：经营劳务派遣业务，应当向劳动行政部门依法申请行政许可。未经许可，任何单位和个人不得经营劳务派遣业务。此次实施办法的出台，正是为了贯彻落实该决定。

2. Non-Competition Compensation 竞业限制补偿

- “The Interpretation on Several Issues Regarding the Application of Law in the Trial of Cases Involving Labor Disputes (IV)” was issued on January 18, 2013. The interpretation clarifies the standards for non-competition compensation. 2013年1月18日，《最高人民法院关于审理劳动争议案件适用法律若干问题的解释（四）》公布，其中对竞业限制补偿标准做了解释。

- Where the parties have agreed upon a non-competition clause in the labor contract or confidentiality agreement, but have not agreed upon the compensation amount to the employee in the event of contract termination, and the employee has fulfilled the obligations under the non-compete clause. Under these circumstances, the employee may claim a monthly payment of 30% of his/her average wage over the 12-month period preceding the termination of the contract.

当事人在劳动合同或者保密协议中约定了竞业限制，但未约定解除或者终止劳动合同后给予劳动者经济补偿，劳动者履行了竞业限制义务，要求用人单位按照劳动者在劳动合同解除或者终止前十二个月平均工资的30%按月支付经济补偿的，人民法院应予支持。
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Looking Back
回首，五年编辑团队

- For the past 5 years, China Monitor has been enlisting the help of a big team of editors/consultants, including:
- 五年来，China Monitor调研有一个很庞大的编辑顾问团队，包括：

Lily Zhang

Founder of China Monitor
Greater China Leader, Information Solutions

Ban Kiat Ong
Cathy Ma
Chengxin Qian
Cherry Xu
Chris Zhang
Cici Yang
Connie Zhang
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- Our thanks also go to Mercer consultants who are responsible for survey questionnaires, consultants from other departments, as well as colleagues from the marketing team, all of whom have been tremendously helpful.
- 美世各个行业调研负责顾问、其他部门的顾问、市场部同事也付出了大量心血，一并致谢。
Chinese Name Contest: Define Your China Monitor
有奖活动——定义您的China Monitor

Dear Clients,

For the past 5 years, China Monitor has been a quarterly dedicated to following talent market trends and HR practices in China and the Asian Pacific regions, in order to provide strategic advice and first-hand information to HR as well as business managers. On the eve of China Monitors' 5th anniversary, we want to invite all of you to send us your feedback and suggestion for a publication name in Chinese. Your feedback will help Mercer raise its service level by improving our questionnaire design and report format. We will select a winner publication name based on succinctness, memorability, and depth of meaning in Chinese.

From the pool of feedback/contest event participating clients, twenty lucky draw winners will each receive a special Mercer souvenir. The selected winner of the Chinese name contest will be gratefully acknowledged in the next quarterly report. Finally, one lucky draw winner will receive a grand prize in the form of a 2 days coupon at Mercer College in 2014 (market price = RMB10,000).

To join this feedback/contest event, please click on: https://surveys.az1.qualtrics.com/SE/?SID=SV_0V8uQ9isdDdUGgJ. The last date to sign up is December 15, 2013.

客户意见征询和征名活动，敬请登录：https://surveys.az1.qualtrics.com/SE/?SID=SV_0V8uQ9isdDdUGgJ 。活动截止日期为2013年12月15日。
### Special Offer

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<th>Discounted Price</th>
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* Please complete, scan and email the subscription form to ISChina@mercer.com。请将填写好的注册表扫描发送到ISChina@mercer.com。
Looking Forward: Survey 2.0 in the era of Big Data
未来的路：大数据时代的调研2.0版

• The era of Big Data has begun. China Monitor keeps steady pace on the path of Survey 2.0. In its 6th year, we will implement some report version upgrades in the following 3 areas:
  • 大数据时代已经到来。China Monitor将坚定走在Survey2.0的道路上，在第六年迎来进一步改版，体现在三方面，敬请期待：

    • Closer contact with clients 更贴近客户：
      • we will enhance our questionnaire design process via follow-up visits, phone calls, Internet channels, etc. to respond to your ideas/needs and the latest HR hot topics.
      • 美世将进一步完善问卷设计流程，通过持续拜访、电话、网络等渠道，了解最新的HR关心热点，和客户共同设计问卷，更贴近客户需求。

    • Core index follow-up 持续跟踪核心指标：
      • we will consolidate opinions on economic conditions, on how business results impact budget, headcount, and attrition rates to connect with lessons learned from the past and build a stronger database for more accurate forecasts in the future.
      • 对于经济、业务对于预算、编制、离职率的影响，口径将进一步标准化，实现历史、现实的连接，并为预测未来提供更加坚实的数据基础。

    • Precise data comparison peer group 精准的对比群组：
      • China Monitor will continue to refine comparison criteria among target companies to allow clients to fine-tune their decision making. In industries where sufficient data can be collected, we will consider publishing distinct but related versions of industry-specific reports to provide clients with market information updates in their respective subsectors as well as upstream/downstream subsectors.
      • China Monitor将继续细化目标公司的对比口径，在某些数据量足够的细分行业甚至设立China Monitor行业细分版本，帮助客户了解所在子行业及上下游子行业在人力资源方面最及时的信息，以便形成更精细化的决策。
Looking Forward: Thank you again and Let Us Keep Working Together
未来的路：再次感谢，继续合作！

• Thank you again for supporting China Monitor. We hope our hard work and professionalism will continue to satisfy your needs for HR market information updates.
• We at China Monitor have embraced the era of Big Data and taken steps to upgrade our services to you. Please give us your continuing support in the next 5 years.

• 再次感谢所有客户对于美世China Monitor调研的支持，也希望美世的认真执着和对专业的追求满足并且继续满足您对于人力资源市场最新信息的需求。
• 在大数据时代，我们China Monitor的发展进入新的阶段。在未来的五年，请您继续支持！

Any questions or suggestions, please feel free to contact us at:
如果您有任何的问题或建议，敬请联系我们：

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