

# 中国人力资源服务业

## 蓝皮书

( 2016 )

萧鸣政 / 主编

BLUE PAPER

FOR HUMAN RESOURCES SERVICE

INDUSTRY IN CHINA



人民出版社

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### 中国人力资源服务业蓝皮书 2016

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# 《中国人力资源服务业蓝皮书 2016》

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## 前 言

中国人力资源服务业助推中国梦的实现。“中国梦”的本质内涵包括国家、社会、群体、个人四个层面,是实现国家富强、社会和谐、人民幸福与人的全面发展。

中国梦的实现与发展在时间上表现为一个系列,可以划分为四个阶段:本世纪的头 20 年、50 年与后发展的 50 年以及未来提升的 100 年。全面建成小康社会是 21 世纪头 20 年的“中国梦”。这是实现 21 世纪头 50 年“中国梦”和后 50 年“中国梦”以及未来 100 年“中国梦”的最重要的基础阶段。因为中国梦的第一步就是百姓的小康梦。

### 一、综合国力的提升需要人力资源 及其服务业外力的助推

“中国梦”的第一要义,就是实现综合国力进一步跃升。我国经济总量已跃居世界第二位,但人口多、人均优势不明显、国内发展很不平衡的状况并未根本改变。党的十八大描绘了到 2020 年的宏伟目标,小康社会全面发展,国内生产总值和城乡居民人均收入比 2010 年翻一番,科技进步对经济增长的贡献率大幅上升,进入创新型国家行列。这一指标体系,构成了现阶段“中国梦”的基本图景。要素资源是经济发展之母,人才资源是经济发展之父。人才经济离不开人力资源服务业的大力帮助与支持。人才经济是相对产业经济来说的。

未来经济的发展是人才经济。产业经济发展模式是先有产业发展后有经济发展,依赖产业发展进行人才发展;而人才经济发展模式是先有人才发展后有经济发展,依赖人才发展进行产业发展。

## 二、人民幸福需要人力资源开发及其服务业的内力化解

人民幸福的内涵是社会和谐、生态文明与人民创造创新活力的自由释放。提升幸福指数是个复杂的系统工程,既要考虑物质因素,又要考虑非物质因素,从根本上讲,就是要进一步提升社会和谐的水平。“坚持维护社会公平正义”“坚持走共同富裕道路”“坚持促进社会和谐”纳入夺取中国特色社会主义新胜利的基本要求,将“保障和改善民生”与物质文明、政治文明、精神文明、社会文明和生态文明“五位一体”的全面发展作为社会建设的重点。这些和谐与文明因素的充实,对“中国梦”的阶段特征作了更为清晰的描绘,也为“中国梦”增添了更加美丽的幸福光环。然而,无论是和谐还是文明,最终的因素在于人力资源服务业的内力化解。只有通过人力资源开发及其服务业的服务,才能实现人与岗位的和谐、人与职业的和谐、人与人的和谐以及人的内在素质发展的和谐,进而实现人的内心的和谐、人与自然的和谐、人与社会的和谐以及整个社会的和谐。同样,只有通过人力资源开发及其服务业的服务,才能发现创新人才,激励创造活力与营造创造氛围。人才招聘与测评有助于发现创新人才,能力薪酬设计有助于激励创造活力,组织文化建设有助于营造创造氛围。

## 三、人的全面发展需要人力资源服务业的提升

“中国梦”具有多个维度,而其价值维度就是要实现人的全面发展。党的十八大明确把“促进人的全面发展”纳入中国特色社会主义道路的内涵之中,并且强调,“不断在实现发展成果由人民共享、促进人的全面发展上取得新成效”。这标志着中国特色社会主义把实现人的自由全面发展作为终极价值追求的主要目标。

促进人的全面发展的思想是马克思提出的。当时的大机器生产把一个完整的生产过程进行分割,一根大头针可以分割为 18 道工序。员工成为机器的附庸与奴隶,没有行为自由,生产十分乏味。因此,马克思提出了人的全面发展理论。显然,员工的全面发展,就是人的自由就业与充分就业。人

力资源开发及其服务业的发展,能够有效地促进人的自由就业与充分就业。

2016年3月21日,中共中央印发了《关于深化人才发展体制机制改革的意见》,强调健全市场化、社会化的人才管理服务体系,积极培育各类专业社会组织和人才中介服务机构,有序承接政府转移的人才培养、评价、流动、激励等职能。作为市场化、社会化人才管理体系的主要组成,人力资源服务业承担了这一历史使命。随着公共部门向市场放权步伐的加快,人力资源服务企业作为市场化主体在市场信息传递、供给需求反馈以及资源配置方面的优势将进一步提升人力资源服务的效率,这对于解决我国当前人才队伍大而不强,领军人才、拔尖人才稀缺,人才创新创造活力不足,制约创新驱动发展等瓶颈问题将起到强有力的推动作用。党和国家一系列的政策表明,我国人才发展与管理事业拥有了制度性的保障,未来中国人力资源服务业将向着更规范、更科学的方向发展,并将在社会经济发展中发挥越来越重要的作用。

为全面贯彻党的十八大和十八届三中、四中、五中全会精神,以邓小平理论、“三个代表”重要思想、科学发展观为指导,深入贯彻习近平总书记系列重要讲话精神,牢固树立科学人才观,助力实施人才优先发展战略,尤其是进一步助力人力资源服务业的健康发展,提高人力资源服务业对加快建设人才强国,把各方面优秀人才集聚到党和国家事业中来的助推作用,在国家人力资源和社会保障部人力资源市场司的大力支持与指导下,北京大学继续推出《中国人力资源服务业蓝皮书 2016》。我们继续秉承推动人力资源服务业更好更快发展的宗旨,对 2015—2016 年度中国人力资源服务业的发展状况进行了深入调查与系统梳理,并从理论高度对实践进行了诊断分析,通过事实描述、数据展现、案例解读、理论归纳和科学预测等方式,力图全面展现当前中国人力资源服务业的发展现状、特色亮点和最新进展。

《中国人力资源服务业蓝皮书 2016》持续紧密把握时代脉搏,与往届相比,除了内容的更新与补充,更在结构上做了大量的调整,主要包括以下几个方面。

第一,继续关注人力资源服务业相关政策法规的出台和调整。蓝皮书全面总结了 2015—2016 年度与人力资源领域,尤其是人力资源服务领域相关的政策和法规的颁布实施,深入分析了当前相关政策法规的新变化和新

趋向。与往年不同的是,今年新增了“政策背景”一项,深入探索每项政策实施的原因和发展路径,尤其关注政策法规背后的战略意涵,以期为人力资源服务从业机构紧跟新形势、适应新变化、利用新优势、谋求新发展提供参考。

第二,继续关注人力资源服务业的热点业务和未来发展趋势。随着经济的蓬勃发展和行业的逐步繁荣,我国人力资源服务业在产业规模、经营项目、从业人员状况以及行业经营理念等方面有了较大的变化。蓝皮书总结了我国人力资源服务机构的概况、人力资源服务机构及其从业人员的现状以及人力资源服务机构经营理念的变化,并对以上变化进行系统分析,以把握我国人力资源服务业发展的趋势和脉络,初步总结出我国人力资源服务业开始呈现垂直化、集聚化、信息化、国际化的发展趋势。此外,蓝皮书持续传统,继续在专家评价和公共参与的基础上,进行了人力资源服务业发展十大事件评选,记录了影响人力资源服务业发展进程中的重大事件,同时提高全社会对人力资源服务业的关注和重视。

第三,关注人力资源服务业的技术创新。实施创新驱动发展战略,就是要推动以科技创新为核心的全面创新,坚持企业在创新中的主体地位,增强科技进步对经济增长的贡献度。2015—2016年行业技术创新最显著的新变化,是移动网络的发展对整个行业的巨大冲击。移动网络的普及与应用,云计算、大数据分析、“互联网+”等技术正在逐渐改变企业人力资源管理的方式,也在创造更多新的人力资源服务模式。蓝皮书总结了本年度人力资源服务业技术创新的情况,并结合具体案例分析了人力资源服务创新应用的成功经验。

第四,继续关注人力资源服务业发展的量化评价模型。蓝皮书继续使用文本分析、实证模型分析等数据挖掘和分析方法,以大数据的方式分析人力资源服务业在微博、微信等流行媒介中的用户分布、发表言论、话题关注度;运用面板模型、聚类分析和主成分分析等方法分析各地相关数据,对各地人力资源服务业发展状况进行评价,并分析各省市有关人力资源服务业的政策特点,从而比较出人力资源服务业在我国各省市的地区发展差异。通过采用量化数据,蓝皮书的评价模型更为准确,对人力资源服务业的评价结果更为科学和可靠。



第五,关注中国高校人力资源服务业教研情况。蓝皮书首次对人力资源服务业教研情况进行了总结与评述。随着人力资源服务业研究机构的不断兴起,大量人力资源服务业相关的学术研究和科研活动也不断发展,在补充人力资源服务业的理论价值的同时,也进一步奠定了人力资源服务业实践的坚实基础。蓝皮书从研究活动、研究成果等方面阐述了人力资源服务业在高校科研院所的理论发展与研究成果,并提出了相应的发展建议。

蓝皮书共分为三个部分,具体结构如下:

第一部分为年度报告篇,共分为三章。第一章梳理分析了年度内人力资源服务主要法律法规政策及新变化。重点解读了政策对人力资源服务业带来的影响,包括对人力资源服务市场中供需变化、交易成本、监管措施等各个方面的短期和长期的影响,力求使读者能够快速掌握每条政策到人力资源服务业的影响传导路径。

第二章介绍了我国人力资源服务业机构的概况。主要分析了人力资源服务机构的作用,并对人力资源服务机构的分类进行了概括和总结。通过系统分析北京市 2015 年人力资源服务机构的相关统计数据,深入剖析机构的各项指标,包括机构类型与性质、服务设施情况指标等,以期反映发达省份乃至全国人力资源服务行业机构的现状。与此同时,介绍了人力资源服务业从业人员的任职方式、持证、学历等情况。最后,介绍了近年来我国人力资源服务业经营理念的变化,并对以上变化进行系统分析,以把握我国人力资源服务业发展的趋势和脉络。

第三章介绍了我国人力资源服务业现状及其发展趋势。以《关于加快发展人力资源服务业的意见》人力资源服务业的业态划分为准,对我国人力资源服务业的各个业态的现状与新发展进行介绍和分析。此外在政策利好的时代背景下,我国人力资源服务业涌现了越来越多优秀的企业,本章挑选了三家优秀的人力资源服务业机构作为案例进行经验分享。在上述基础上,结合数据与实例,探讨了人力资源服务业未来的发展趋势,总结出我国人力资源服务业的未来走向。最后,本章对技术创新在人力资源服务业中的应用进行了介绍,以期为我国人力资源服务业的创新发展提供一些经验及理论支持。

第二部分为专题报告篇,共分为四章。第一章通过对主流媒体、各省政

府工作报告以及相关的政策法规进行内容分析,来阐述人力资源服务业在我国各省市的发展情况以及各省市政府对人力资源服务业发展的重视程度,比较各省市在人力资源服务业的政策制定方面的差异性,并且对相关政策法规条进行梳理总结归纳政策制定的基本情况及发展态势。

第二章主要针对人力资源服务业的宏观影响因素、地区间人力资源服务业发展差距和各地人力资源服务企业竞争力差异这三个方面的问题,收集了相关数据资料,运用面板模型、聚类分析和主成分分析等方法对上述问题进行了分析,发现发展人力资源服务业,归根结底是要经济进一步发展,促进产业进一步升级。此外增强企业活力也是行业健康发展的重要手段,分析显示人力资源服务业较发达的地区人力资源服务企业规模较大,民营化程度更高。

第三章延续以往蓝皮书相关章节,为 2015—2016 年促进人力资源服务业发展十大事件评选,继续记载中国人力资源服务业的发展历程,旨在让世人了解中国人力资源服务业一年来在政策、学术和行业三方面取得的突破性进展。

第四章关注我国高校人力资源服务业教研情况。对参与人力资源服务业教研的机构进行研究和评价,对参与人力资源服务业教研的机构进行研究和梳理,从教学研究与学术活动等方面阐述人力资源服务业在科研院所的理论发展。在教研现状的描述基础上,综述近年来高校的人力资源服务业研究成果,包括理论型、综合型、实践型三类。这些研究成果不仅在理论上提升了人力资源服务业的高度,同时也指导了人力资源服务业实践的不断发展。

第三部分选编了我国部分人力资源服务网站、人才市场、服务企业名录,以及过去一年度的部分研究成果名录,供读者查阅了解更深入的信息。

蓝皮书由北京大学人力资源开发与管理研究中心负责组织编写,萧鸣政教授担任主编,赵源博士担任副主编。

李净、胡鹏、唐秀锋、徐珊等同志参加了第一部分的编写工作;董志霖、丁肇启、武雪健、王晨舟、夏浩然等同志参加了第二部分的编写工作;范文琦参与了第三部分的编写。郭晟豪、赵源、张博等同志参与了前言、英文摘要及摘要的翻译工作。赵源博士协助主编进行了全书的统稿和项目综合协调

工作。

特别感谢国家人力资源和社会保障部人力资源市场司孙建立司长一直以来对北京大学在中国人力资源服务业方面研究的关注与大力支持,尤其对于本书以及未来研究提出的一系列指导性意见。感谢中国人力资源开发研究会秘书长李震、中国对外服务工作行业协会秘书长樊进生、中国劳动保障科学研究院副院长赵越、人民出版社编辑部高级编辑胡元梓、北京市人力资源和社会保障局人力资源市场处处长董小华等专家学者对本书提出的宝贵建议。

古往今来,人才都是富国之本、兴邦大计,人力资源作为经济社会发展第一资源的特征和作用更加明显。近年来,中国人力资源服务业涵盖的内容早已超出人们传统认知中职业介绍、劳务派遣的概念,在党和国家的支持下,中国人力资源服务业新兴业态全面发展,与互联网、金融等产业领域跨界融合的创新产品层出不穷。“十三五”规划后,中国人力资源服务业将迎来新一轮跨越式发展。在挑战与机遇并存的情形下,我们继续秉承客观反映、系统揭示、积极推动、方向探索的宗旨,希望《中国人力资源服务业蓝皮书 2016》能够对我国实施人才强国战略、转变经济增长方式,实现“两个一百年”奋斗目标、实现中华民族伟大复兴的中国梦起到一定的参考和推动作用。

萧鸣政

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## Preface

China's human resources services boost the realization of the Chinese dream, which covers four elements, namely, the state, the society, the population and individuals aiming for the national prosperity, social harmony, people's happiness and individual's all-round development.

The realization of the "Chinese dream" can be divided into the following four periods: the first 20 years of this century, the first 50 years of this century, the 50 years of development and the next 100 years. The "Chinese dream" in the first 20 years of 21<sup>st</sup> century is to build a well-off society in an all-round way, so this is the most important foundation of the other three periods.

### 1. Human Resource and Human Resource Services can improve the comprehensive national power

The essence of the "Chinese dream" is to improve the comprehensive national power. China has become the second economy in the world; however, huge population, imbalanced domestic development remain unchanged. The Third Plenum of the 18<sup>th</sup> CPC depicted the grand goal by 2020, which includes a developed well-off society, the GDP and per capita income doubling compared to that of the year 2010, increase of the rate of scientific and technological progress contribution to the economic growth and becoming an innovative country. This indicator system constitutes the basic picture of the "Chinese dream" currently. Resources and human resources are respectively the mother and father of economic development.

## 2. Human Resource Development and Services can enhance people's happiness

The people's happiness is related to social harmony, ecological civilization and free release of innovation ability. Promoting well-being is a complicated systematical project and it needs the consideration of both material and non-material factors. Basically, it aims at improving social harmony. To maintain social fairness and justice and the road of common prosperity, and to improve social harmony are taken as the essential requirements for the new victory of socialism with Chinese characteristics. We should ensure and improve people's livelihood with material, political, spiritual, social and ecological civilization and treat them as a "five-in-one" development focus of social construction. With these factors for harmony and social development, the blueprint of the Chinese dream can be described clearly, and it makes the Chinese dream more colourful. However, both harmony and civilization count on the coordination of Human Resource Development and Service, which can facilitate the harmony between people and jobs, people and career, and one person and another, and promote the people's inner quality development. Therefore, it helps to realize people's inner harmony, harmony between man and nature, harmony between man and society and harmony of the whole society. Similarly, Human Resource Development and Services can help to tap the innovative talents and encourage innovation as well as to discover innovative talents. Besides, design of the competency-based pay can help to enhance innovation ability, and organizational culture creates the innovation atmosphere.

## 3. Human Resource Services improve human beings' development

The "Chinese dream" has many dimensions, and its value dimension aims at

people's development. The Third Plenum of the 18<sup>th</sup> CPC advocated channeling "people's development" into the development of socialism with Chinese characteristics, and also emphasized the effort for the development achievements shared by people during the process of promoting the people's development. This means socialism with Chinese characteristics treats the people's all-round development as the ultimate value pursuit.

Marx advocated the thought of improving people's all-round development. The big machine production period divided the complete production process into different steps. Even a pin was made up of 18 steps. Workers became the vassal of machine and there was not any freedom during production activities, and production became very boring. Therefore, Marx advocated people's all-round development. Obviously, the all-round development of workers means people's free employment and full employment, which the development of Human Resource Services can facilitate.

On the 21<sup>st</sup> of March 2016, the CPC issued *The Opinion On Deepening the Reform of the Talent Development Mechanism*, which stresses the improvement of market-oriented and socialized talents management and services, the fostering of all kinds of professional social organizations and talent services institutions, and talents training, evaluation, flow, and encouragement from the government. As the important part of market-oriented and socialized talents management and services system, Human Resources Services should undertake the mission. Following the process of streamline administration and institute decentralization, Human Resource Service enterprises in market information transformation and feedback of supply and demand have improved the efficiency of Human Resource Services, solving the problems of talent team being big but not strong, lack of talents and innovative ability, and innovation development constraints. Policies issued by the Party and government have ensured the talent development undertaking. China's Human Resource Services will be more normative and scientific and play a more important role in the future.

With an aim to continuously implement the spirit of the 3<sup>rd</sup>, 4<sup>th</sup> and 5<sup>th</sup> Ple-

nary Sessions of the 18<sup>th</sup> CPC Central Committee, under the guidance of Deng Xiaoping theory, “three represents” thought and the concept of scientific development, we should carry out the spirit of president Xi Jinping’s important speech, establish a scientific talent value and help to carry out the strategy of talent development priority, especially to help Human Resource Services develop healthily, improve the effect of Human Resource Services in the process of talent development, with the strong support from and under the guidance of the Human Resource Market Department of Ministry of Human Resource and Social Security, Peking University is launching the *Blue Paper for Human Resource Service Industry in China 2016*. Guided by the principle of achieving even better and faster development of the Human Resource Service Industry, we have combed the development status of the Human Resource Service Industry in China from 2015 to 2016 in a systematic way and made an in-depth analysis from a theoretical perspective. In so doing, we would like to give a full picture of the development status, the priority areas and the latest development of the Human Resource Service Industry in China through theoretical induction, fact description, data demonstration, case studies, scientific projection and other methods.

Keeping pace with the times, the *Blue Paper for Human Resource Service Industry in China 2016* has made a lot of updates and adjustments on the structure and contents, mainly including:

First, it continues to focus on the new developments and progress of policy and regulatory environment. It reviews the adjustments on HR-related policies and regulations in the past year, and makes an in-depth analysis of the new changes and new features of main policies and regulations related to the HR service industry. Besides, it also brings a new part containing the background of new policies and regulations, with an aim to facilitating HR service agencies to keep up with the new situation, adapt to the new changes and seek new development.

Second, it continues to focus on the hot business and the development trend

in the future. Following the fast development of the HR service industry and economy, there are huge changes in the industrial scale, business projects, practitioners' status and industry management idea of China's HR service industry. The Blue Paper analyzes and concludes the above-mentioned aspects, tries to seize the development trend of China's HR Service Industry. It seems that the HR service industry in China began to see the trend of vertical integration, agglomeration, informationization and internationalization. Besides, with the expert evaluation and public participation, the Blue Paper continues to bring the poll for the Top 10 events leading to the development of the HR service industry. The purpose of this poll is to record the historical continuity of China's HR service industry development, shedding light on significant accomplishments China's HR service industry has achieved in enterprises, academic studies, and the industry over the past year.

Third, it continues to focus on the technical innovation of the HR service industry. The implementation of the innovation-driven development strategy aims to promote scientific and technological innovation as the core of the comprehensive innovation, to put enterprises in a core position in innovation and enhance the contribution of scientific and technological progress to economic growth. The most obvious change in 2015—2016 is the shock brought by the mobile network development. The application of mobile network, cloud computing, big data analysis and the Internet+ is changing the method of HR management and creates more model of HR service. The Blue Paper points out the innovation status of HR service industry in the year of 2016 and makes the case studies to analyze the successful experience of some application in the HR service innovation.

Fourth, it continues to focus on the quantitative evaluation model of the development of HR service industry. It uses text analysis and the empirical model analysis to analyze the user distribution, opinion and topic of interest in the SNS. It analyzes the related data by using the panel model, clustering analysis and principal component analysis and evaluated the HR service in every province in China. This makes the Blue Paper's evaluation model more accurate, scientific and



reliable.

Fifth, it focuses on the HR service industry research situation in Chinese universities for the first time. Following the rise of HR service research institutions, the academic research and scientific activities have also developed, not only supplementing the theoretical value, but also laying the foundation for the HR service practice. The Blue Paper concludes the theoretical development and research results of HR service in China's universities and gives some suggestions.

This Blue Paper is divided into three parts in the following structure:

Part I: Annual Reports. It is divided into three chapters. Chapter 1 teases out and analyzes newly issued or amended laws, regulations and policies that were enacted by the State in 2015—2016 and have significant impact on HR and HR service industry. It emphasizes the political impact on the HR service industry, including the market supply and demand change, transaction costs and regulatory in both short term and long term. It makes every effort to enable the readers to quickly grasp the influence on HR service industry.

Chapter 2 introduces the situation of the HR service agencies in China. It analyzes the function of these agencies and also makes the classification of these agencies. By analyzing the data of Beijing's HR service in 2015, including type, nature and service facilities, it tries to show the development of developed provinces and even the whole country. Meanwhile, this chapter also introduces the practitioners' position type, accredited status and education information. Finally, it introduces the changing business idea of HR service industry and analyzes them systematically and tries to grasp the development trend of the HR service industry in China.

Chapter 3 introduces the current situation and development trend of the HR service industry in China. According to the industry cluster from the *Opinions on Speeding up the Development of Human Resource Service*, this chapter introduces the situation and new developments of every industry cluster of HR service in China. Besides, under the good political background, there are more and more