

中国人力资源服务业 蓝皮书 2014

Blue Paper for Human
Resources Service
Industry in China

萧鸣政 李 栋◎主 编
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前 言

我国是人口大国,在我国进行现代化建设、走向民族伟大复兴的进程中,如何充分发挥人的优势,使人口大国成为人力资源强国和人才强国,始终是党和国家以及全社会关切的重大课题。党的十八大以来,习近平同志围绕人才问题,提出了一系列重要论述,如“择天下英才而用之”“在全社会大兴识才、爱才、敬才、用才之风”“让人才事业兴旺起来”“知识就是力量,人才就是未来”等等。这些重要论述充分体现了党和国家对各级各类人才的关心重视,充分体现了人力资源因素在我国发展中的重要地位。

2014年8月,国务院总理李克强在听取国家杰出青年科学基金设立20周年人才培养和科研成果汇报时强调,要突破体制机制障碍,给创新、创造人才更广阔的空间,让中国的“人口红利”转化为“人才红利”。“人口红利”是指因劳动年龄人口比例较高而对经济增长产生的积极效应;“人才红利”则是指人才在总人口中所占比重较高,成为经济发展的重要助推力量。相较“人口红利”所强调的劳动者数量规模,“人才红利”更强调劳动者的素质水平。从本质上讲,由“人口红利”转化为“人才红利”,就是要强化人才资源,提升人力资本,让劳动者的智慧在经济社会发展中发挥更为显著的作用。这无疑对全社会的人力资源管理及其服务工作提出了更高的要求。新的形势下,人力资源服务业需发挥更为积极的作用,为人力资源强国和人才强国建设作出突出贡献,为实现中华民族伟大复兴的中国梦提供智力支持。

十八届三中全会提出,“使市场在资源配置中起决定作用”“建立集聚人才体制机制,择天下英才而用之,打破体制壁垒,扫除身份障碍,让人人都有成长成才、脱颖而出的通道,让各类人才都有施展才华的广阔天地”,这对人力资源服务业的发展具有非常重要的指导意义。按照十八届三中全会精神,人力资源服务行业是重要的市场力量,应该也必将在我国经济社会发展中发挥更加突出的作用。这就要求各类人力资源服务机构抓住机遇、乘

势而上,持续提高服务能力、提升服务水平,为人力资源的充分开发和利用提供支持、创造条件,为实施人才强国战略作出更大贡献。

为了继续贯彻落实《国家“十二五”发展纲要》与《国家人才发展中长期规划纲要(2010—2020年)》的要求,贯彻党的十八大精神,进一步推动人力资源服务业的发展,提高人力资源服务业对人才强国战略的助推作用,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,北京大学和上海市对外服务有限公司推出《中国人力资源服务业蓝皮书 2014》。我们秉承推动人力资源服务业更好更快发展的宗旨,对 2014 年度中国人力资源服务业的发展状况进行了系统梳理,并从理论高度对实践进行了深入分析,通过理论归纳、事实描述、数据展现、案例解读和科学预测等方式,力图向读者全面展现中国人力资源服务业的发展现状、重点领域和最新进展。

《中国人力资源服务业蓝皮书 2014》紧密把握时代发展脉搏,在结构和内容上都做了大量的更新和调整,主要包括以下几个方面:

第一,继续关注政策法规环境的新变化和新进展。蓝皮书全面总结了过去一年与人力资源相关的政策和法规的更新调整,深入分析了人力资源服务业领域主要政策和法规的新变化和新趋向,便于人力资源服务机构紧跟新形势,适应新变化,谋求新发展。

第二,关注人力资源服务业发展的地区差异。蓝皮书首次使用词频分析等大数据分析方法,通过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和关注度,分析各省市有关人力资源服务业的政策特点,比较人力资源服务业在我国各省市的地区发展差异,通过这种区域比较分析,使我们对人力资源服务业的认识进一步得到拓展和深化。

第三,关注人力资源服务业的国际化。蓝皮书首次对欧美、东南亚发达国家的人力资源服务业进行了分析,并从基本数据、行业发展起步年代、产业政策发布年代和服务内容四个方面进行了人力资源服务业的比较分析,提出了实现我国人力资源服务业的更好更快发展需要在专业化、国际化、信息化和服务项目整合等领域推进创新并同时迅速制订完善的产业政策。

第四,关注了人力资源服务业的热点业务和未来发展趋势。对人力资源服务领域的热点业务做了补充和更新,科学梳理和细致分析了业务的特点与发展。在此基础上,就人力资源服务业的发展成效和所面临的形势进

行了分析,指出我国人力资源服务业产业集聚区效应正在逐步呈现,行业自律体系基本形成,人力资源服务体系呈现多元化发展的整体趋势。

第五,继续关注行业发展的重大走向。蓝皮书对人力资源服务业的部分研究成果和专业研究机构进行了展现。在专家评价和公共参与的基础上,2013—2014年促进人力资源服务业发展十大事件评选继前两年的成功展开后又继续进行,旨在记录人力资源服务业的跨越式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。

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,共分为四章。第一章梳理分析了年度内国家新颁布或修订的对人力资源及人力资源服务业有重要影响的法律法规政策,如《关于进一步推进户籍制度改革的意见》《事业单位人事管理条例》《劳务派遣暂行规定》等,通过这些法律法规政策的深入解读,可以使我们及时掌握人力资源服务业所处的政策环境新变化和新动向。

第二章创造性地运用 PEST 战略环境分析模型,从政治环境、经济环境、社会环境以及技术环境四个维度,有针对性地分析了人力资源服务业面临的外部环境,进而指出外部环境变化给人力资源服务业带来的机遇和挑战。

第三章介绍了我国人力资源服务业机构的概况、人力资源服务业机构现状及变化、人力资源服务业从业人员现状及变化、人力资源服务业机构服务理念的变化,并对以上变化进行分析,以把握我国人力资源服务业发展的整体趋势和脉络。

第四章介绍了我国人力资源服务业的基本业态,对各类招聘服务、人才测评服务、人力资源外包服务、高端人才寻访服务、管理咨询服务、人力资源软件服务、流动人员档案管理服务、派遣代理服务等八种业态进行了概括性分析。本章还就人力资源服务业的发展成效和所面临的形势进行了分析,在国家宏观政策和经济发展的双重刺激下,我国人力资源服务业产业集聚区效应正在逐步呈现,行业自律体系基本形成,人力资源服务体系呈现多元化发展趋势。人力资源服务业在取得良好的发展成效之时,也面临着国家行政职能转变、信息技术催生新型商业模式和人力资源供求发生变化的新形势挑战。

第二部分为专题报告篇,共分为四章。第一章通过词频分析等大数据

分析方法,阐述人力资源服务业在我国各省市的发展情况及各省市政府对人力资源服务业发展的重视度。具体展开的分析点包括:人力资源服务业在微博这个新兴的网络环境中的网民关注度及发展情况,人力资源服务业在微信环境下的发展模式,各省市政府对人力资源服务业发展的政策支持水平,以及各省市在人力资源服务业的政策制定方面的比较分析,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。

第二章在盘点概括我国当前人力资源服务业的现状基础上,指出专业化、品牌化、国际化、服务整合和服务结构更加明显是我国人力资源服务业的必然发展趋势。同时本章还从人力资源服务业和企业人力资源管理部门中挑选典型案例进行分析,试图通过它们的先进经验展现我国人力资源服务业的新面貌,从而影响更多的企业重视人力资源管理,提升企业竞争力。有别于往年的白皮书,本章还首次对欧美、东南亚国家的人力资源服务业进行了分析,并从基本数据、行业发展起步年代、产业政策发布年代和服务内容四个方面进行了人力资源服务业的比较分析,提出了中国人力资源服务业需要在专业化、国际化、信息化和服务项目整合等领域推进创新并同时迅速制订完善的产业政策,以期真正早日实现人才强国的目标。

第三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三个方面,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。分析结果认为人力资源服务业健康快速发展的基础是经济的发展和转型,一个地区只有经济发达到一定程度,才能有人力资源服务业发展的经济土壤,因此,要想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。

第四章延续以往白皮书相关章节,为2013—2014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在政策、学术和行业三方面一年来取得的重要性进展。

第三部分选编了我国最新的人才市场名录、人力资源服务企业名录、部分人力资源服务研究机构名录,以及过去一年的部分研究成果名录。

蓝皮书主编由北京大学人力资源开发与管理研究中心主任萧鸣政教授

和东浩兰生集团副总裁、上海市对外服务有限公司党委书记、董事长李栋担任。上海市对外服务有限公司总经理葛平先生、北京大学社科部副部长王周谊先生担任副主编,杨河、于鸿君、王博、刘波、周岳明、周志忍、朱天飙、萧鸣政、李栋、萧群、朱庆阳、葛平、刘宏杰、龚祥和、王周谊、毕培文、陈洁平、余立越、高亚平、罗湘军担任编辑委员会委员。

李净、胡鹏、曹伟晓、张湘姝、左秋思、白增涛等同志参加了第一部分的编写工作;萧鸣政、丁肇启、董志霖、张博、郭晟豪等同志参加了第二部分的撰写工作;王安琪、吴万鹏等同志参加了第三部分的编写工作;陈养龄、黄冰源等同志参加了前言、英文目录及摘要的翻译工作;张博、罗湘军、吕卉等同志协助主编进行了全书的统稿工作;罗湘军、张博、吕卉等同志负责项目综合协调工作。

特别感谢国家人力资源和社会保障部相关部门及有关领导的大力支持和指导,感谢王克良司长、杨文财处长、余兴安、毕雪融、陈军、赵越、刘学民、王继承、李震、樊进生、戴长亮、胡元梓、陈永利、林革、赵静等领导的大力支持与指导,感谢谢克海、林革、赵静等专家学者对本书提出的宝贵建议,感谢北京市人社局相关部门与领导、其他相关行业服务机构和专家、学者的热情帮助和积极支持。

人才兴则民族兴,人力资源强则国家强。人力资源服务业对我国实施就业优先战略和人才强国战略具有重要的推动作用,在发挥人才效能和推动人才强国的进程中肩负着重要的使命。在我国全面深化改革、实现发展突围的关键时期,在凝聚各方力量、实现中国梦的宏伟蓝图下,在中华民族的复兴之路上,人力资源服务业需要更健康、更快速的发展壮大,以作出更大的积极贡献。我们继续秉承客观反映、系统揭示、积极推动、方向探索的宗旨,希望《中国人力资源服务业蓝皮书 2014》能够对转变经济增长方式、实施人才强国战略与实现中国梦起到一定的推动和促进作用。

《中国人力资源服务业蓝皮书 2014》主编

2014 年 11 月

Preface

It has become a common concern for the Party, the state and the whole society to make full use of our talent competitiveness throughout the course of modernization and great rejuvenation of the Chinese nation with an aim to develop China into a powerful nation of human resources and talents from the world's most populous nation. Since the Party's Eighteenth National Congress, President Xi Jinping has made a series of important instructions with a focus on talent management, including "attracting talent from all over the world", "raise public awareness of recognizing talents, cherishing talents, respecting talents and putting talents to best use throughout society", "unleashing talents for maximum prosperity" and "knowledge is power, talents are our future", to name just a few. These important instructions fully demonstrate the importance our Party and country attach to all kinds of talents and the important role of human resources in promoting the development of all economic and social undertakings.

In August 2014, Chinese Premier Li Keqiang stressed the importance of talented people and innovation while meeting with winners of the National Outstanding Youth Science Foundation to mark the 20th anniversary of its establishment. Li urged that we should break through structural and institutional obstacles to provide a more enormous space for innovative and creative talents with an aim to turn China's "demographic dividend" into "talent dividend". The "demographic dividend" refers to the positive effect of a relatively high proportion of working-age population on economic growth. And the "talent dividend" means that talents account for a high proportion of the total population and therefore become an important driving force for the country's economic growth. Compared to the number of workers stressed by the "demographic dividend," the "talent div-

idend” emphasizes the quality of workers. Essentially, turning China’s “demographic dividend” into “talent dividend” means that we need to strengthen talent resources, enhance talent capital, thus allowing workers’ wisdom playing a more significant role in the economic and social development. This has undoubtedly put forward more demanding requirements on human resource management and service work of the whole society. In the current new situation, the human resources industry needs to play a more active role in reinvigorating the country through human resources management and talent development, thus providing intellectual support for achieving the Chinese Dream of a “great rejuvenation of the Chinese nation”.

In the 3rd Plenary Session of the 18th CPC Central Committee, China’s ruling party pledged to “let markets play a decisive role in allocating resources” and “We will create the best conditions to attract talents from all over the world. We will remove institutional and other barriers to smooth the channels for each individual to exercise to the full his or her potential and create space for outstanding individuals to put their talent to the best use”. This is of great significance in guiding the development of human resources service industry. According to the spirit of the 3rd Plenary Session of the 18th CPC Central Committee, the human resources service industry, as a major market force, should and must play a more prominent role in China’s economic and social development. This would require human resources service agencies to seize the opportunity and momentum to continuously improve their service capabilities and service level, so as to provide support and create conditions for the development and utilization of human resources and facilitate the implementation of development the strategy of strengthening the country through human resources development.

With an aim to continuously implementing the *Outlines of the 12th Five-Year Plan for Economic and Social Development in China and the Guidelines of National Medium- and Long-Term Human Resources Development* (2010–2012) and to implementing the spirit of the report delivered at the 18th CPC National Congress for continuing to further promote the development of the human re-

sources service industry and strengthen the role of the human resources service industry in boosting the strategy of strengthening the country through human resources development, with the strong support from and under the guidance of the Human Resources Market Department of Ministry of Human Resources and Social Security, Peking University and Shanghai Foreign Service Co., Ltd. are launching the *White Paper for Human Resources Service Industry in China 2014*. Guided by the principle of achieving even better and faster development of the human resources service industry, we have combed the development status of the human resources service industry in China in 2014 in a systematic way and made an in-depth analysis from a theoretical perspective on the practices. 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 resources service industry in China through theoretical induction, fact description, data demonstration, case study, scientific projection and other methods.

Keeping pace with the times, the *White Paper for Human Resources Service Industry in China 2014* 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 on policy and regulatory environment. The White Paper reviews the adjustments on HR-related policies and regulations in the past year, and makes an in-depth analysis on the new changes and new features of main policies and regulations related to the HR service industry, 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 attaches importance to the regional differences in the development of the HR service industry. This year, word frequency analysis and other big data analysis methods were adopted for the first time in the White Paper. User distribution and levels of attention Internet users paid to the HR service industry in microblog, wechat and other popular media were analyzed to present an insight into the characteristics of policies concerning the HR service industry issued by different provincial and municipal governments. By so doing,

we identified the regional differences in the development of the HR service industry in different provinces and municipals in China, thereby further expanding and deepening our understanding of the HR service industry.

Third, it pays attention to internationalization in HR service sector. For the first time in the White Paper, it makes an analysis on the HR service industry in the developed countries in Europe, America, and Southeast Asia. It offers a comparative analysis of the HR service industry between China and western countries from 4 aspects, i.e., basic data, the year when the country started to develop the industry, the year when the country started to publish its industrial policies and service content. Based on such elaboration and analysis, the White Paper proposes that China's HR service industry shall boost the innovation in specialization, internationalization, information technology application, service integration and other areas on the one hand, and formulate a comprehensive industrial policy in an early date on the other hand.

Fourth, it pays attention to nationally and even globally focused businesses and future development trend of the HR service sector. It offers an update and extension of the focused businesses in HR service sector, making a science-based combing and careful analysis of the features and developments of such businesses. On this basis, it analyzes the development achievements and the situation the HR service industry faces, thereby pointing out that industrial agglomeration effect is gradually becoming manifest in China's HR service sector, the industry self-regulation system has basically taken shape and the HR service system is showing a good momentum of diversified development.

Fifth, it continues to focus on major trends in the developments of the industry. This White Paper presents some research results and professional research institutions in the HR service industry. On the basis of expert evaluation and public participation, the poll for the Top Ten Events Leading to the Development of the HR Service Industry 2013–2014 is conducted again following two years of success. The purpose of this poll is to record the significant events in the leapfrog growth of the HR service industry on the one hand, and bring more at-

tention from the whole society on the HR service industry on the one hand.

This White Paper is divided into three parts with the following structure:

Part I, Annual Reports, is divided into four chapters. Chapter 1 teases out and analyzes newly issued or amended laws, regulations and policies that are enacted by the State in 2014 and have significant impact on HR and HR service industry. These include the *Opinions on Further Promoting the Reform of the Household Registration System*, *Regulation on the Personnel Management of Public Institutions* and *Interim Provisions on Labor Dispatch*. In-depth interpretation of these laws, regulations and policies enables us to keep better track of the new changes and new trends in policies and regulations faced by the HR service industry.

Chapter 2 uses PEST analysis (a tool for analysis of strategic environment) in an innovative manner to illustrate externalities faced with the HR service industry by looking at political, economic, socio-cultural and technological factors. It thereby pointed out the opportunities and challenges brought by changes in the externalities to the HR service industry.

Chapter 3 provides an overview of HR service agencies in China, the current status and changes of HR service agencies, the current status of and changes in the labor force in the HR service industry and the changes in service concepts of HR service agencies. This chapter also makes an analysis on the above-mentioned changes with an aim to reveal the development trends and trajectory of the HR service industry in China.

Chapter 4 describes the current status of the HR service industry in China, offering a general overview and analysis on eight segments, i.e., various recruitment services, talent assessment services, human resources outsourcing services, executive search services, management consulting services, HR software services, personnel file management for migrant workers and dispatch agency services. It analyzes the development achievements and the situation the HR service industry faces, thereby pointing out that under the dual stimulus of national macroeconomic policies and economic development, industrial agglom-

eration effect is gradually becoming manifest in China's HR service sector, the industry self-regulation system has basically taken shape and the HR service system is showing a good momentum of diversified development. While achieving sound development results, the HR service industry is also faced with challenges from the new situation including the transformation of government functions as well as new business models and changes in HR supply/demand brought by information technology.

Part II, Special Reports, is divided into four chapters. Chapter 1 uses word frequency analysis and other big data analysis methods to elaborate the actual development of the HR service industry in different provinces and municipals in China as well as levels of attention paid by various provincial and municipal governments on the development of the HR service industry. Issues examined in detail in this chapter include the levels of attention Internet users paid on the HR service industry in microblog (an emerging network environment) and its development, the development model of the HR service industry in microblog environment, the levels of support various provincial and municipal governments provided to policies concerning the development of the HR service industry and a comparative analysis of policy formulation in various provinces and cities for the HR service industry. Chapter 1 also teases out and outlines related laws, regulations and policies and briefly addresses some background information and development trend of policy formulation.

After reviewing the current status of the HR service industry in China, Chapter 2 then draws a conclusion that specialization, branding, internationalization, service integration and clearer service structure are inevitable trends for the development of the HR service industry in China. Meanwhile, this chapter provides an analysis on several cases selected from the HR service industry and HR management departments in enterprises, with an aim to affecting more enterprises and strengthening enterprise competitiveness by attracting more attention to HR management. Unlike White Papers in previous years, this chapter, for the first time in the White Paper, makes an analysis on the HR service industry in

the developed countries in Europe, America, and Southeast Asia. It offers a comparative analysis of the HR service industry between China and western countries from 4 aspects, i.e., basic data, the year when the country started to develop the industry, the year when the country start to publish its industrial policies and service content. Based on such elaboration and analysis, the White Paper proposes that China's HR service industry shall boost the innovation in specialization, internationalization, information technology application, service integration and other areas on the one hand, and formulate a comprehensive industrial policy in an early date on the other hand with an aim to attain our goal of strengthening the country through human resources development.

Chapter 3 mainly focuses on three aspects, i.e., macroscopic affection factor of the HR service industry, development gap in China's HR service industry between regions and differences in competitiveness of enterprises in the HR service industry between regions. This chapter collects relevant data and examines in detail the above-mentioned issues by using panel model, cluster analysis and principal component analysis. Analysis results have shown that economic development and transformation serves as the basis for rapid and healthy development of the HR service industry. The development of the HR service industry can be possible only when a certain level of regional economic development is reached. Therefore, in the final analysis, without further economic development and further industrial upgrading, there can be no genuine development in the HR service industry.

Like previous White Papers, Chapter 4 is all about the poll for the Top Ten Events Leading to the Development of the HR Service Industry 2013–2014. 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.

Part 3 selects and provides a systematic overview of the latest list of talent markets in China, a directory of HR service enterprises, a directory of some HR

service agencies and a directory of part of the research results in the past year.

This White Paper is issued under the general editorship of Professor Xiao Mingzheng, Director of the Research Center of Human Resources Development & Management of Peking University and Mr. Li Dong, the Vice President of Shanghai East Best International (Group) Co., Ltd. and Party Secretary & Chairman of Shanghai Foreign Service Co., Ltd. serve as editors-in-chief. Mr. Ge Ping (General manager of Shanghai Foreign Service Co., Ltd.) and Mr. Wang Zhouyi (Deputy Director of Office of Social Science, Peking University) serves as Deputy Editor. Yang He, Yu Hongjun, Wang Bo, Liu Bo, Zhou Yueming, Zhou Zhiren, Zhu Tianbiao, Xiao Mingzheng, Li Dong, Xiao Qun, Zhu Qingyang, Ge Ping, Liu Hongjie, Gong Xianghe, Wang Zhouyi, Bi Peiwen, Chen Jieping, Yu Liyue, Gao Yaping, Luo Xiangjun serve as members of the Editorial Board.

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