中国人力资源服务业蓝皮书

2015

Blue Paper for Human Resources Service
Industry in China

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前　言

　　我国是人口大国,在走向中华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,始终是党和国家以及全社会关切的重大命题。党的十八大以来,习近平与李克强同志围绕人力资源服务业如何服务中国经济社会发展的问题,提出了一系列重要论述,如"择天下英才而用之","让人才事业兴旺起来","知识就是力量,人才就是未来",让中国的"人口红利"转化为"人才红利",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服务业在我国经济社会发展与中国梦实现中的重要地位。

　　中国人力资源服务业的健康与蓬勃发展,关系到大众创业与万众创新,关系到创新性国家与人力资源强国的建设与发展。2014 年 8 月 6 日,国务院就发布了《关于加快发展生产性服务业促进产业结构调整升级的指导意见》,人力资源服务和品牌建设成为主要任务之一;2014 年 12 月 25 日,人力资源市场司继续发布《人力资源社会保障部、国家发展改革委、财政部关于加快发展人力资源服务业的意见》,促进人力资源服务业持续健康发展,明确指出人力资源服务业是国家确定的生产性服务业重点领域,发展人力资源服务业成为我国实现全面建成小康社会目标的应有之义。

　　为全面贯彻党的十八大、十八届四中、五中全会精神和《国务院关于加快发展生产性服务业促进产业结构调整升级的指导意见》,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实施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继续推出《中国人力资源服务业蓝皮书 2015》。我们对 2014—2015 年度中国人力资源服务业的发展状况进行了全面搜集与系统梳理,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,力图全面展现近

年来中国人力资源服务业的发展现状、重点领域和最新进展。

与往年相比,《中国人力资源服务业蓝皮书 2015》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。蓝皮书秉承传统,全面总结了 2014—2015 年度与人力资源领域相关的政策和法规的更新调整,进而深入分析了当前人力资源服务业领域主要政策法规的新变化和新趋向,以期为人力资源服务机构紧跟新形势、适应新变化、利用新优势、谋求新发展提供参考。

第二,关注"互联网+"时代的人力资源服务业新动向。一方面,互联网带来的信息高速传播,大大提高了人们对信息的获取能力和工作效率,促使整个社会价值更加多元、竞争更加激烈、产业更新换代更快,从而改变了人与组织的博弈态势,以及人力资源管理理念的更新。另一方面,互联网技术的广泛应用也促使人力资源管理的各个环节工作效率提升,使具体的工作方式发生变化。

第三,继续关注人力资源服务业发展数据模型。蓝皮书继续使用词频分析、实证模型分析等数据分析方法,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,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,分析各省市政府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,我们对人力资源服务业的认识可以得到进一步拓展和深化。

第四,关注中国高校人力资源服务业教研情况。蓝皮书首次对参与人力资源服务业教研的机构进行研究和评价。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。蓝皮书从机构简介、课程培训、学术活动、课题研究等方面阐述了人力资源服务业在科研院所的理论发展与研究成果。

第五,继续关注人力资源服务业的热点业务和未来发展趋势。蓝皮书通过梳理中国人力资源服务业的发展情况和学界对业态划分方法的主要观点提出了人力资源服务业态的划分方式。介绍了 2014—2015 年度全国人力资源服务业的重要活动,在内容上涵盖学、政、企三界,并总结出我国人力

资源服务业专业化、集群化、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。

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。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。

第二章介绍了我国人力资源服务业机构的概况,分析了人力资源服务业机构的作用,并对人力资源服务业机构的分类进行了总结和概括。从具体人力资源服务机构数据入手进行分析,深入剖析人力资源行业机构的现状,并从与往年的对比中发现机构变化趋势。同时,就人力资源从业人员的角度进行分析,通过探讨人力资源从业人员在素质分类、经验能力、学历结构、教育培训等方面因素,对近年来我国人力资源服务业经营理念的变化并做了详细的分析。

第三章介绍了我国人力资源服务业现状及其发展趋势,介绍了我国人力资源服务业的业态划分情况,分析了"互联网+"技术对我国人力资源服务业的影响,并对年度全国人力资源服务业的重要活动进行了介绍。最后,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发展趋势。

第四章介绍了我国人力资源服务业经验与技术创新,在总结各类优秀人力资源服务机构代表的经验的同时,将一些新的信息技术,如云技术在人力资源服务业的应用、人力资源共享服务中心概念的引进以及SaaS(软件即服务)的实践在人力资源服务业中的应用进行介绍,以期为我国人力资源服务业的发展提供一些经验及理论支持。

第二部分为专题报告篇,共分为三章。第一章通过各部分使用词频分析等研究方法,来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。通过词频分析,探究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以及人力资源服务业在微信环境下的发展模式;通过对2014年各省市的政府工作报告文本

进行分析,探究各省市政府对人力资源服务业发展的政策支持水平。最后,通过对各省市(除港澳台地区)的人力资源服务业相关政策法规法条进行整理分析。

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。

第三章延续以往蓝皮书相关章节,2014—2015 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,一年来取得的突破性进展。

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、陆军、萧鸣政、李栋、萧群、葛平、朱庆阳、刘宏杰、龚祥和、王周谊、毕培文、朱农飞、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、唐秀峰、吴思寒、张博等同志参加了第一部分的编写工作;董志霖、丁肇启、郭晟豪等同志参加了第二部分的编写工作;张鹏等同志参加了第三部分的编写工作。张博、罗湘军、吕卉等同志协助主编进行了全书的统稿和项目综合协调工作。

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人才兴则民族兴,人力资源强则国家强。伴随着人力资源配置市场化改革进程,我国人力资源服务业从无到有,多元化、多层次的人力资源服务

体系初步形成。加快发展人力资源服务业,是优先开发与优化配置人力资源,建设人力资源强国的内在要求,是实现更加充分和更高质量就业的重要举措,对于推动经济发展方式向主要依靠科技进步、劳动者素质提高、管理创新转变具有重要意义。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2015》能够对我国实施人才强国战略、转变经济增长方式,实现中华民族的伟大复兴起到一定的参考和推动作用。

《中国人力资源服务业蓝皮书2015》主编
2015年11月

Preface

China is a large-population nation. It has been a major concern for the Party, the state and the whole society to make full use of our talent competitiveness to achieve the great rejuvenation of the Chinese nation with an aim to developing China into a powerful nation of human resources from the world's most populous nation. Since the Party's Eighteenth National Congress, President Xi Jinping and Premier Li Keqiang have made a series of important instructions with a focus on how human resources service industry could help China's social and economic development, including "attracting and employing talents from all over the world", "bringing full prosperity to human resources development", "knowledge is power, talents are our future" and "turning China's demographic dividend into talent dividend", to name just a few. These important instructions have given full expression to the concern and emphasis our Party and country have attached to talents of all types and at all levels and the important role of human resources in promoting China's economic and social development and the realization of the Chinese dream.

The healthy and robust development of the HR service industry in China not only concerns mass entrepreneurship and public innovation, but also influences the construction and development of China as an innovation-oriented country and a powerful nation of human resources. On August 6th 2014, the State Council released the *Guiding Opinions of the State Council on Accelerating the Development of Production-type Service Industries to Promote Restructuring and Enhancement of the Industrial Structure* to identify human resources services and brand building as one of the main tasks. On December 25th 2014, the Human Resources Market Department of Ministry of Human Resources and Social Secur-

ity continued to release the *Opinions of the Ministry of Human Resources and Social Security, the National Development and Reform Commission and the Ministry of Finance on Accelerating the Development of the Human Resources Service Industry* to promote the sustainable and healthy development of the human resources service industry. This Opinion clearly points out that the human resources service industry is one of the priority areas in the production-type service industry identified by the state and the development of the human resources service industry shall be one of the goals in accomplishing the building of a moderately prosperous society in all respects.

With an aim to acting on the spirit of the reports delivered at the 18th CPC National Congress, the fourth and fifth plenary session of the 17th CPC Central Committee, the State shall continue to fully implement the *Guiding Opinions of the State Council on Accelerating the Development of Production-type Service Industries to Promote Restructuring and Enhancement of the Industrial Structure* to further promote the sound development of the human resources 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 *Blue Paper on Human Resources Service Industry in China 2015*. We have reviewed the development status quo of the human resources service industry in China between 2014 and 2015 in a comprehensive and systematic way and made an in-depth analysis of the industry practices from a theoretical perspective. We intend to present 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.

Compared with the previous papers, the *Blue Paper on Human Resources Service Industry in China 2015* has made a variety of updates to and adjustments

on the structure and contents, mainly including:

First, it continues to focus on the new changes and development of the policy and regulatory environment. This Blue Paper preserves the tradition and reviews the updates and the adjustments of the HR-related policies and regulations between 2014 and 2015 comprehensively and makes an in-depth analysis of the new changes and new features of the main policies and regulations related to the HR service industry with an aim to providing the underpinnings to HR service agencies for keeping up with the new trend, adapting to and taking advantages of the new changes and seeking new development.

Second, it pays close attention to the new trends of the human resources service industry in the Internet Plus era. On the one hand, fast information dissemination brought about by the Internet has greatly improved people's information accessibility and work efficiency, thus contributing to the diversification of the social value, the intensified competition and the faster industrial upgrading and changing of the industry. This has changed the situation of game between the organizations and employees and facilitated the updating of human resources management concept. On the other hand, the extensive use of Internet technology helps increase the work efficiency of human resource management in every stage, resulting in the changes of specific working styles.

Third, it continues to put emphasis on the data model of the development of the human resources service industry. This Blue Paper continues to adopt such analysis methods like word frequency analysis, empirical model analysis to analyze the user distribution and levels of attention Internet users have paid to the HR service industry in Weibo, WeChat and other popular media. It also examines in detail the relevant data collected from different places across China by using panel model, cluster analysis and principal component analysis, which presents an insight into the characteristics of policies concerning the HR service industry and also the development differences of the industry in different provinces and cities. With the use of quantitative data, it also identifies the regional differences in the development of the HR service industry in different provinces and munici-

pals in China; the Paper further expands and deepens our understanding of the HR service industry.

Fourth, it pays concerns to the teaching and research of Chinese universities on the human resources service industry. For the first time, this Blue Paper studies and evaluates the institutions involved in the teaching and research of the human resources service industry. With the constant establishment of research institutions in the human resources service industry, the scale of relevant academic researches and studies has been on constant expansion, which has laid a solid foundation for HR service practices and has supplemented the theoretical value of human resources services. In this context, this Blue Paper provides an overview of organization profiles, training courses, academic activities, research projects and other aspects to elaborate on the theoretical development and research accomplishments regarding the human resources service industry by the relevant-research institutes have made.

Fifth, it continues to pay attention to the hotspot businesses and the future development trend of the HR service sector. This Blue Paper proposes a method of segment classification of the commercial activities based on the systematic review of the development of the HR service industry in China and the main points of the academic circle on the segment classification of the HR service industry. It introduces the major events of the human resources service industry in China between 2014 and 2015, covering events of political, economic and academic circles. It then summarizes the trend of specialization, clusterization, informatization and internationalization of the development of the human resources services in China. Additionally, on the basis of expert evaluation and public participation, a poll for the Top Ten Events of the Development of the HR Service Industry is conducted again this year following the three-year success, with an aim to recording the significant events in the leapfrog growth of the HR service industry on the one hand, and attracting more attention from the whole society on the HR service industry on the other hand.

This Blue Paper comprises three parts and can be presented in the

following way:

Part I, Annual Reports, consists of three chapters. Chapter 1 teases out and analyzes the major laws, regulations and policies and the new changes of the HR service industry that are enacted by the State in 2015. 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 concerning the HR service industry.

Chapter 2 presents an overview of the HR service agencies in China, followed by an analysis on the roles of HR service agencies and a summary of the classification of HR service agencies. It then focuses on some data of specific human resources agencies to provide an in-depth analysis on the status quo of the HR service agencies, followed by an elaboration of the development trends of the HR service agencies derived based on the comparison between the past contexts and current trajectories. Also, this chapter tries to some factors such as quality classification, experience and capabilities, educational qualification and education and training of HR practitioners which influence the development of the HR services from the perspective of the HR practitioners, including quality classification, experience and capabilities, educational qualification and education and training of HR practitioners, presenting a detailed analysis of the changes of the business concepts in China.

Chapter 3 provides an overview of the status quo and the development trends of the HR service industry in China, which describes the segment classification of the commercial activities of the HR service industry in China, analyses the impact of "Internet Plus" technologies on the HR service industry in China and also outlines the major events of the human resources service industry in China in 2015. This chapter concludes itself by probing into the future industrial landscape of and summarizing the HR service industry in China based on relevant data and events.

Chapter 4 provides information on the experiences and technological innovation of the human resources service industry in China. It not only summarizes

the working experiences of the outstanding enterprises in the HR service industry, but also presents the application of some new information technologies (such as cloud technology) in the human resources service industry, the introduction of the "centralized HR shared service center" concept and the application of SaaS(software as a service) in the human resources service industry with an aim to providing experience reference and theoretical support for the development of the human resources service industry in China.

Part II, Special Reports, consists of three chapters. Chapter 1 elaborates the actual development of the HR service industry in different provinces and municipals in China as well as the different levels of attention paid by various provincial and municipal governments on the development of the HR service industry based on the results of word frequency analysis and other methods. Word frequency analysis is adopted to examine the levels of attention Internet users have paid to the HR service industry and its development in microblog(an emerging network environment) and the development model of the HR service industry in WeChat environment. The government work reports of various provinces and cities in 2014 are analyzed to examine the levels of policy support each province and city provides to the development of the HR service industry. The final section of this chapter focuses on outlining and analyzing the laws, regulations and policies concerning the HR service industry in various provinces and cities(excluding Hong Kong, Macao and Taiwan) to examine the differences in policy formulation in various provinces and cities for the HR service industry.

Chapter 2 mainly focuses on three aspects, i. e., macroscopic influence factors of the HR service industry, the regional development gaps in China's HR service industry and the regional differences in competitiveness of enterprises in the HR service industry. Based on the relevant collected data, this chapter examines in detail the above-mentioned issues by using various analysis tools such as panel model, cluster analysis and principal component analysis. Analysis results have shown that economic development and transformation serves as the basis for the rapid and healthy development of the HR service industry.

Similar to the corresponding sections in previous Blue Papers, this chapter outlines the Top Ten Events of the Development of the HR Service Industry 2014—2015.It continues to record the development process of China's HR service industry, shedding light on the breakthroughs and accomplishments China's HR service industry has achieved in policy guidance, academic research and industry development in 2015.

Part 3 provides a systematic overview of the selected latest list of talent markets, HR service enterprises, some HR service agencies and part of the research results in the HR service industry in China in 2015.

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