

中国人力资源服务业 蓝皮书 2018

萧鸣政 等 编著

HR
2018

Blue Paper
for Human Resources Service
Industry in China

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前 言

人力资源,是推动社会经济发展的第一资源;人才资源,是民族振兴与赢得国际竞争主动的战略性资源。我国拥有世界上规模最大的人力与人才资源,做好人力资源服务产业,深挖人力与人才资源这座“富矿”,有利于新时代全面释放我国经济社会创新发展的潜能,实现国家创新发展战略。

人力资源服务业,是现代服务业发展中的重要产业。习近平总书记在党的十九大报告中明确指出,加快要素价格市场化改革,放宽服务业准入限制,完善市场监管体制,加快发展现代服务业。就业是最大的民生,要坚持就业优先战略和积极就业政策,实现更高质量和更充分就业;提供全方位公共就业服务,破除妨碍劳动力、人才社会性流动的体制机制弊端;加快建设人才强国,让各类人才的创造活力竞相迸发、聪明才智充分涌流。

面对新时代全球人力资源服务产业发展的新趋势,国务院从战略与法制层面上积极推进我国人力资源服务业的创新发展,加大顶层政策设计,引导人力资源服务产业转型升级;推进体制机制创新,有效维护统一开放、竞争有序的市场环境。2018年6月29日,国务院颁布了《人力资源市场暂行条例》。该条例对充分发挥市场在人力资源配置中的决定性作用、强化政府的人力资源市场培育职责、落实“放管服”改革要求、细化就业促进法及相关法律的规定等多方面内容作出了全面细致的规定;对健全完善人力资源市场体系,推动人力资源服务业健康发展,促进人力资源自由有序流动和优化配置,更好服务就业创业和高质量发展,实施就业优先战略和人才强国战略,具有重要意义。

一年来,国家人力资源和社会保障部积极贯彻落实党和国家的相关指示精神,着力推动与引领我国人力资源服务产业创新发展,取得了明显成效。人力资源服务产业地位已经确立,服务产品日益丰富,服务能力进一步提升,服务体系基本形成。截至2017年年底,我国人力资源服务业全年营

业收入达到了 1.44 万亿元, 各级各类人力资源服务机构 3.02 万家, 从业人员 58.4 万人, 服务 3190 多万家企业, 帮助 2.3 亿人次实现就业或者转换工作岗位。中国国际技术智力合作有限公司、上海市对外服务有限公司、北京外企人力资源服务有限公司等一批骨干企业进入了中国企业 500 强。此外, 人力资源和社会保障部已批复分别在上海、苏州、重庆、河南、浙江、福建等地建设 11 家国家级人力资源服务产业园。我国人力资源服务业在迅速发展的同时, 也暴露出一些迫切需要解决的问题, 整体发展水平和世界一流的人力资源服务业也存在一定的差距。因此, 对我国人力资源服务业进行系统研究, 了解其发展的现状、探究其发展过程中存在的问题、探索其未来的发展趋势, 并采取有效措施, 推动人力资源服务业发展, 具有重要战略意义。

为了全面贯彻党和国家关于大力发展服务业的精神, 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, 北京大学继续推出《中国人力资源服务业蓝皮书 2018》。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 2017—2018 年度^①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, 并结合专业前沿理论对年度内行业实践的状况进行了包括理论概述、事实描述、量化实证、案例分析在内的具有科学性和前瞻性的评价、分析与预测, 力图更加全面地展现当前中国及其各省市人力资源服务业的发展现状、重点、亮点、问题和最新进展。

《中国人力资源服务业蓝皮书 2018》与往年相比, 全书对于结构进行了一些创新性的调整, 并对内容又进行了大量的更新、补充和丰富, 这主要表现在以下几个方面。

第一, 2018 年继续“政策背景”部分的创新, 深入探索每项政策实施的原因和发展路径。今年本章除了对政策进行解读外, 在分类方法上采用了层级分类, 有国家层面的如国务院颁布的政策法规, 有人力资源和社会保障部制定的行业政策规定, 也有地方政府、其他部委发布的相关政策规定。本

^① 2017—2018 年度, 主要是指 2017 年 8 月 1 日至 2018 年 7 月 30 日之间。

书进一步扩大了信息收集的来源,除了中央政府、地方政府和国家部委的政策外,还把一些基本有结论、正在进行发布程序的政策也纳入范围。同往年一样,除了详细解读政策本身外,本书还重点解读了政策给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,持续关注我国人力资源服务业的业态发展状况和新机遇,主要聚焦在两方面:政府人才服务机构的改革以及军民融合人力资源服务新需求。其中,政府人才服务机构的改革介绍了政府人才服务机构的发展历程和定位,分析了目前存在的主要问题以及原因,并在借鉴国内外人才公共服务机构发展经验的基础上提出了未来的改革思路。军民融合人力资源服务是顺应国家战略的新需求,相关的理论研究非常欠缺,因此本部分主要就军民融合人力资源服务的研究背景、整体策略和路径以及重点和难点问题进行了理论分析,同时以四川省和陕西省为例,对于我国军民融合人力资源服务的实践与经验进行了介绍。

第三,继续关注人力资源服务业发展的量化评价模型。各省市的发展状况方面,继续从公众、政府、非政府组织三大群体的视角出发,通过大数据方法和文本分析方法对主流社交媒介、纸质媒介、网站、各省政府工作报告以及相关政策法规、规划文件进行数量统计和内容分析,来阐述人力资源服务业在我国各省市受到的重视程度及发展情况。发展水平评价方面,通过设计人力资源服务业发展状况评价指标体系,在搜集相关数据资料基础上,依托这一指标体系利用主成分分析法等对各地区人力资源服务业发展水平进行了排序、分类,并对相关的数据分析结果进行了阐释与说明,最后概括总结了评价结果,提出了相应的政策建议,同往年相比,本书的评价模型更为准确,对人力资源服务业的评价结果分析更为科学和详细,提出的配套政策建议更加充实可靠。

第四,对人力资源服务业的竞争力进行了量化分析。本书在回顾相关研究的基础之上,构建出人力资源服务企业竞争力评价指标体系,并运用人力资源和社会保障部评选的全国人力资源诚信服务示范机构的相关数据,选取95家具有代表性的样本企业,采取主成分分析的方法,对企业竞争力

进行了综合排名。最后,本书在对我国人力资源服务企业发展现状作出总体性把握的基础上,对企业间竞争力差异的原因进行进一步分析,并提出了相关建议。

第五,继续关注人力资源服务业十大事件评选。人力资源服务业十大事件的评选旨在展现中国人力资源服务业发展的延续性,让世人了解中国人力资源服务业在产、学、研三方面这一年来取得的突破性进展与重要成绩,大事件评选过程本身也能够提高全社会对人力资源服务业的关注和重视。蓝皮书秉承传统,优化了人力资源服务业十大事件部分的评选方式与流程,将原有正文中的“事件评述”部分拆分为“事件点评”和“重要启示”两部分,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。

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。第一章主要摘录和分析了2017年8月至2018年7月我国人力资源服务业有重大影响的法律法规政策及其新变化。本章通过这些法律法规政策进行深入解读,使读者能够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。2018年继续“政策背景”部分的创新,深入探索每项政策实施的原因和发展路径。今年本章除了对政策进行解读外,在分类方法上采用了层级分类,有国家层面的如国务院颁布的政策法规,有人力资源和社会保障部制定的行业政策规定,也有地方政府、其他部委发布的相关政策规定。

第二章的内容共分为五部分。第一部分首先根据《中国人力资源服务业发展报告》的数据,分析了我国人力资源服务机构及其从业人员、业务开展的现状。第二部分通过对比2016年和2017年两年的数据,分析了人力资源服务业业态发展及其变化。第三部分基于人力资源服务业的发展现状,合理预测人力资源服务机构未来发展趋势以及前景。第四部分重点介绍了人力资源服务技术创新与发展趋势,其中技术创新部分重点就大数据和移动管理平台在人力资源服务业的应用进行了介绍;发展趋势则结合了当前最为先进的技术趋势包括互联网、大数据、人工智能、云技术、VR技术等,对于先进技术在人力资源服务业的应用进行了分析和展望。第五部分对于年度人力资源服务业发展新亮点进行了概括,主要聚焦在两方面:政府

人才服务机构的改革以及军民融合人力资源服务新需求。其中,政府人才服务机构的改革介绍了政府人才服务机构的发展历程和定位,分析了目前存在的主要问题以及原因,并在借鉴国内外人才公共服务机构发展经验的基础上提出了未来的改革思路。军民融合人力资源服务是顺应国家战略的新需求,相关的理论研究非常欠缺,因此本部分主要就军民融合人力资源服务的研究背景、整体策略和路径以及重点和难点问题进行了理论分析,同时以四川省和陕西省为例,对于我国军民融合人力资源服务的实践与经验进行了介绍。

第三章以广西锦绣前程人力资源有限公司和深圳市人力资源保障局为案例,重点对其在行业发展和行政管理过程中的先进经验和突出贡献进行介绍,以期与其他地区和机构进行交流,并给国内的人力资源服务机构及相关政府部门提供参考和借鉴。

第二部分为专题报告篇,共分为四章。第一章进行了人力资源服务业各省市重视度与发展度评价。本章从公众、政府、非政府组织三大群体的视角出发,通过大数据方法和文本分析方法对主流社交媒介、纸质媒介、网站、各省政府工作报告以及相关政策法规、规划文件进行数量统计和内容分析,来阐述人力资源服务业在我国各省市受到的重视程度及发展情况。

第二章通过设计人力资源服务业发展状况评价指标体系,在搜集相关数据资料基础上,依托这一指标体系利用主成分分析法等对各地区人力资源服务业发展水平进行了排序、分类,并对相关的数据分析结果进行了阐释与说明,最后概括总结了评价结果,提出了相应的政策建议。研究结果显示:我国人力资源服务业区域性发展差异显著,中西部地区行业发展空间广阔;对于人力资源服务业的发展来讲,政府积极、及时的政策扶持与宏观调控是至关重要的;人力资源服务业的发展不能只关注发展的速度,产业发展的基础以及未来发展的潜力等均是产业水平的重要组成部分;人力资源服务业发展水平较高地区的辐射带动作用尚未充分发挥,未来需进一步关注地区行业互动机制的建立;应正确理解地区人力资源服务业的发展与经济发展间的相互协同关系。基于这些结果,本章最后也针对性地提出了相关政策建议,如产业发展的相关政策应与当地整体的社会经济发展政策相吻合,不能脱离现实而盲目追求产业发展的高速度;不断实现政策的完善化、

精准化,保持政策的延续性和平稳性,因地制宜地保证政策实施落地;等等。

第三章在回顾相关研究的基础之上,构建出人力资源服务企业竞争力评价指标体系,并运用人力资源和社会保障部评选的全国人力资源诚信服务示范机构的相关数据,选取95家具有代表性的样本企业,采取主成分分析的方法,对企业竞争力进行了综合排名。最后,本书在对我国人力资源服务企业发展现状作出总体性把握的基础上,对企业间竞争力差异的原因进行进一步分析,并提出了相关建议。

第四章评选了人力资源服务业十大事件。本章延续以往蓝皮书传统,对2017—2018年促进人力资源服务业发展的十大事件进行了评选,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。本章首先介绍了大事件评选的指导思想、评选目的与意义、评选的原则与标准以及评选的方式与程序,接下来则是对年度十大事件进行述评,主要包括事件提要、事件点评和重要启示三个组成部分。

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,萧鸣政教授担任全书内容与各章节标题设计、指导各章节的编写,负责前言撰写、全书文字修改与审改,董杲博士后协助萧鸣政教授完成了大量的综合协调与统稿工作。

李净、胡鹏、王艳涛、张智广、王慧等同志参与了第一部分的编写工作,林禾、董杲、韩翹楚、魏忠凯等同志参与了第二部分的编写工作。王婉莹、多吉班丹参与了第三部分的编写工作。史洪阳参与了前言起草,并且与董杲等同志参与了目录与全书各章节英文标题、英文摘要的翻译工作。

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等领导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。

人才是国家发展的战略资源,人才强则科技强、国家强。伴随着人力资源配置的市场化改革进程,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,服务产品日益丰富,服务能力进一步提升。

展望未来,人力资源服务业正面临前所未有的发展机遇。国家创新驱动战略的实施、“互联网+”时代的来临以及“一带一路”“京津冀协同发展”等重大战略的实施都对人力资源服务业的发展提供了新的切入点、着力点和增长点,中国人力资源服务业将迎来新一轮跨越式发展。面对难得的发展机遇,我们继续秉承客观反映、系统提示、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 2018》能够对中国人力资源服务业的发展起到一定的参考和推动作用,助力人才强国战略和中国梦的实现。

北京大学人力资源开发与管理研究中心主任

萧鸣政

2018年11月

Preface

Human resources are the key resources to promote social and economic development; human resources are strategic resources for national rejuvenation and the initiative to win international competition. China has the largest talent and human resources in the world, improving the human resources service industry, and excavating into the “rich mine” of manpower and human resources, which is conducive to the full release of China’s economic and social innovation and development potential in the new era, and realize the national innovation and development strategy.

The human resources service industry (hereinafter referred to as HRSI) is an important industry in the development of modern service industry. In the report of the 19th National Congress of the CPC, general secretary Xi Jinping clearly pointed out that in the future, we will speed up the reform of market-based pricing of factors of production, and relax control over market access in the service sector. The market supervision system should be improved, and the modern service industries should be accelerated. Employment is pivotal to people’s well-being. We must give high priority to employment and pursue a proactive employment policy, striving to achieve fuller employment and create better quality jobs. We must remove institutional barriers that block the social mobility of labor and talent. We will step up efforts to make China a talent-strong country. We will provide comprehensive public employment services, remove the shortcomings of the system and mechanism that hinder the social mobility of labor and talents, and accelerate the building of a strong country of talents. We aim to see that in every field the creativity of talent is given great expression and their ingenuity and expertise flow freely.

Facing the new trend of global HRSI development in the new era, the State Council actively promotes the innovation and development of China's human resources service industry from the strategic and legal level, increases the top-level policy design, guides the transformation and upgrading of human resources service industry, and promotes institutional mechanism innovation. Effectively maintaining a unified, and open market environment with orderly competition. On June 29, 2018, the State Council promulgated the "Interim Regulations on the Human Resources Market". This regulation gives full play to the decisive role of the market in the allocation of human resources, strengthens the government's responsibilities for human resources market cultivation, and implements the "distribution service" reform requirements. Various aspects such as refining the Employment Promotion Law and related laws have been comprehensively and meticulously stipulated. This is of great significance for improving and perfecting the human resources market system, promoting the healthy development of the human resources service industry, promoting the free and orderly flow of human resources and optimizing the allocation, and better serving employment, entrepreneurship and high-quality development, and implementing the employment priority strategy and the strategy of talent-strong country.

Over the past year, the Ministry of Human Resources and Social Security has actively implemented the spirit of the relevant directives of the party and the state, and has made efforts to promote and lead the innovation and development of China's HRSI, and achieved remarkable results. The status of HRSI has been established, service products are increasingly enriched, service capabilities are further enhanced, and service systems are basically formed. By the end of 2017, China's HRSI's annual operating income reached 1.44 trillion yuan, with 30,200 human resources service agencies at all levels, employing 584,000 people, serving more than 31.9 million businesses and helping 230 million people to realize employment or convert jobs. A number of key enterprises such as China International Intellectech Co., Ltd., Shanghai Foreign Service (Group) Co., Ltd. and Beijing Foreign Enterprise Human Resources Service Co., Ltd. have entered the

top 500 Chinese enterprises. In addition, the Ministry of Human Resources and Social Security has approved the construction of 11 national-level human resources service industrial parks in Shanghai, Suzhou, Chongqing, Henan, Zhejiang and Fujian. While China's HRSI is developing rapidly, it also exposes some problems that need to be solved urgently. There is also a certain gap between the overall development level and the world-class HRSI. Therefore, it is of great strategic significance to carry out systematic research on China's HRSI, understand its development status, explore problems in its development process, explore its future development trend, and take effective measures to promote the development of HRSI.

In order to fully implement the spirit of the party and the state on vigorously developing the service industry, further assist the healthy development of the HRSI, and improve the role of the HRSI in implementing the strategy of talent-strong country, under the strong support and guidance of Human Resources Marketing Department of the Ministry of Human Resources and Social Security, Peking University continued to launch the *Blue Paper 2018 for Human Resources Service Industry in China* (hereinafter referred to as *Blue Paper 2018*). We continue to uphold the purpose of promoting the better and faster development of the HRSI. We conducted an in-depth investigation and systematic review of the development of China's HRSI in 2017 - 2018, and combined the professional frontier theory to the status of industry practice during the year. Scientific and forward-looking evaluation, analysis and prediction are employed in the *Blue Paper 2018*, including theoretical overview, factual description, quantitative evidence, case analysis, in an attempt to more fully present the current situation, key points and highlights of China's HRSI, critical areas, and the latest developments.

Compared to previous years, the structure of the *Blue Paper 2018* makes some innovative adjustments, and a lot of content updates, supplements were added, which is mainly expressed in the following aspects.

First, *Blue Paper 2018* continued the innovation of "Policy Background" to

deeply explore the causes and development path of every policy in 2018. Another new change is the classification method by dividing relevant policies into three categories, i.e. (1) national policies enacted by the State Council that have a significant impact on China's human resources service industry, (2) policies that enacted by the Ministry of Human Resources and Social Security, (3) policies enacted by local governments and other Ministries that have a significant impact on the regional and vocational human resources service industry, which is unlike the practice of the previous years. Apart from the policies that have been released by the Central Government and local government departments, we also consider in advance some policies that have already derived some basic conclusions and are being processed for release. In addition to the in-depth interpretation of policies themselves, we also elaborate the impact of policies on the human resources service industry, including the short-term and long-term effects on changes in market changes of supply and demand, transaction costs, regulatory measures in every aspect of the human resources service industry. Such efforts are given to facilitate a quicker understanding of the readers on the impact transmission mechanism of each policy on the development of the human resources service industry.

Second, *Blue Paper 2018* continued to focus on the development of the forms of human resource service industry and new opportunities. The new highlights of the annual development of human resources services were summarized. The new highlights mainly included two aspects, the reform of government human resource service institutions and new demand of human resources services in civil-military integration. In the section of reform of the government human resource service organization, we firstly introduced the development course and orientation of the government human resource service institutions, analyzed the main problems and reasons and then put forward the future reform ideas on the basis of experience analysis of the government human resource service institutions both at home and abroad. In the section of new demand of human resources services in civil-military integration, we introduced the research back-

ground, discussed the overall strategy and path, and analyzed the most difficulty and critical issues of human resources services in civil-military integration. At last, the practice and experience of Sichuan and Shaanxi provinces of civil military integration of human resources services were introduced.

Third, *Blue Paper 2018* continues to put emphasis on the quantitative evaluation model of the development of human resource service industry. In terms of the development of various provinces and cities, we continue the concern of non-governmental organizations, employ the methods of big data analysis and content analysis, analyze the mainstream social media, paper media, websites, provincial government work reports and relevant policies, regulations and planning documents, from three different perspectives of the public, government and non-governmental organizations, to describe the degree of attention and development situation of human resources services in China's provinces and cities. In terms of evaluation of development level, by designing the evaluation index system of human resources service industry development status, based on collecting relevant data, this index system is used to sort and classify the development level of human resources service industry in each region by principal component analysis. And the relevant data analysis results are explained. Finally, the evaluation results are summarized and the corresponding policy recommendations are put forward. Compared with previous years, the evaluation model of this book is more accurate, the analysis is more scientific and detailed, and the proposed supporting policy recommendations are more substantial and reliable.

Fourth, pay attention to the competitiveness of China's human resources service enterprises. Based on reviewing relevant research, this book builds an evaluation index system for human resources service enterprise competitiveness, and uses the relevant data of the National Human Resources Integrity Service Demonstration Organization selected by the Ministry of Human Resources and Social Security. We selected 95 sample companies and adopted a principal component analysis method to comprehensively rank the competitiveness of enterprises. Finally, based on the overall situation of the development of China's

human resources service enterprises, this book further analyzes the reasons for the differences in competitiveness between enterprises, and puts forward relevant suggestions.

Fifth, *Blue Paper 2018* continue to pay close attention to the human resource service industry Top Ten Events selection. The poll for the Top Ten Events of the Development of the HR Service Industry is designed to reveal the development process of China's HR service industry, shedding light on the breakthroughs and accomplishments China's HR service industry has achieved in production, scholarship and research over the past year. The poll itself can also enhance public attention and support for the development of the HR service industry. *Blue Paper 2018* upholds the tradition and optimizes the selection methods and procedures for the Top Ten Events in the human resource service industry. The "event review" is divided into two parts: "event comments" and "key revelation". The poll for the Top Ten Events was conducted on the basis of experts rating and public participation.

Blue Paper 2018 for Human Resources Service Industry in China is divided into three units, the specific structure is as follows:

The first unit is the yearly report, divided into three chapters. The first chapter outlines and analyzes the laws, regulations and policies and their new changes that have significant impact on China's human resources service industry enacted by the State between August 2017 and July 2018. 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. In addition to the introduction and interpretation of relevant policies, this chapter of the Blue Paper continue the innovation of "Policy Background" to deeply explore the causes and development path of every policy in 2018. Another new changes is the classification method by dividing relevant policies into three categories, i.e. (1) national policies enacted by the State Council that have a significant impact on China's human resources service industry, (2) policies that enacted by the Ministry of Human Resources and Social Security,