

Printing and Publishing Training Board
印刷及出版業訓練委員會



2014

Printing and Publishing Industries
Manpower Survey Report
印刷及出版業 • 人力調查報告書



OPPORTUNITIES • ACTION • SUCCESS
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2014 Manpower Survey Report
Printing and Publishing Industries

Printing and Publishing Training Board
Vocational Training Council

印刷及出版業
2014年人力調查報告

職業訓練局
印刷及出版業訓練委員會

CONTENTS

Section	Title	Paragraph	Page
	Executive Summary	1 - 11	1 - 6
I	Introduction	1.1 - 1.14	7 - 12
II	Survey Findings	2.1 - 2.26	13 - 36
III	Conclusions	3.1 - 3.63	37 - 64
IV	Recommendations	4.1 - 4.41	65 - 76
	Appendices	1 - 20	146 - 214

目 錄

章 數	題 目	段 數	頁 數
報告摘要		1 - 11	77 - 81
I	緒論	1.1 - 1.14	82 - 86
II	調查結果摘要	2.1 - 2.26	87 - 110
III	結論	3.1 - 3.63	111 - 135
IV	建議	4.1 - 4.41	136 - 145
附錄		1 - 20	146 - 214

LIST OF APPENDICES

Appendix		
1	Membership List	146 - 147
2	Terms of Reference	148
3	Printing Industry	150 - 168
	(a) Questionnaire	
	(b) Explanatory Notes	
	(c) List of Job Descriptions	
4	Publishing Industry	169 - 187
	(a) Questionnaire	
	(b) Explanatory Notes	
	(c) List of Job Descriptions	
5	Manpower Statistics in the Printing Industry	188 - 189
6	Manpower Statistics in the Publishing Industry	190 - 192
7	Preferred Education of Employees in the Printing Industry	193
8	Preferred Education of Employees in the Publishing Industry	194
9	Preferred Training Period of Employees in the Printing Industry	195
10	Preferred Training Period of Employees in the Publishing Industry	196
11	Preferred Training Mode of Employees in the Printing Industry	197
12	Preferred Training Mode of Employees in the Publishing Industry	198
13	Distribution of Employees by Monthly Income Range in the Printing Industry	199 - 200

14	Distribution of Employees by Monthly Income Range in the Publishing Industry	201 - 202
15	Employees' Training Needs (All Sectors)(Printing)	203 - 204
16	Employees' Training Needs (All Sectors)(Publishing)	205 - 206
17	Forecast Annual Additional Skills Demand between 2015 and 2017 in the Printing Industry	207 - 208
18	Forecast Annual Additional Skills Demand between 2015 and 2017 in the Publishing Industry	209 – 211
19	Courses Offered under the Skills Upgrading Scheme Plus	212 - 213
20	Relevant Printing and Publishing Courses Offered by Hong Kong Design Institute	214

附錄

附錄		
1	委員名單	146 - 147
2	職權範圍	149
3	印刷業	150 - 168
	(a) 調查表	
	(b) 附註	
	(c) 工作說明	
4	出版業	169 - 187
	(a) 調查表	
	(b) 附註	
	(c) 工作說明	
5	印刷業人力統計數字	188 - 189
6	出版業人力統計數字	190 - 192
7	印刷業僱員宜有教育程度	193
8	出版業僱員宜有教育程度	194
9	印刷業僱員宜有訓練期	195
10	出版業僱員宜有訓練期	196
11	印刷業僱員宜有訓練形式	197
12	出版業僱員宜有訓練形式	198
13	印刷業僱員每月收入分布情況	199 - 200
14	出版業僱員每月收入分布情況	201 - 202
15	僱員所需訓練（印刷業各門類）	203 - 204

16	僱員所需訓練（出版業各門類）	205 - 206
17	預測2015年至2017年間 印刷業技術人員的需求數目	207 - 208
18	預測2015年至2017年間 出版業技術人員的需求數目	209 - 211
19	新技能提升計劃課程一覽表	212 - 213
20	香港知專設計學院相關課程一覽表	214

Executive Summary

2014 Manpower Survey Report of the Printing and Publishing Industries

Introduction

The Printing and Publishing Training Board conducted a survey of the printing and publishing industries from mid-May to mid-October 2014 to collect the up-to-date manpower information. This is the eighth joint manpower survey of the printing and publishing industries.

2. The fieldwork of the survey covered 904 establishments from a total of 5 797 establishments registered with the Census and Statistics Department. The survey data from the selected establishments were scaled up statistically to reflect the overall manpower situation of the industries.

Survey Findings

3. The survey revealed that in May 2014, a total of 17 690 and 10 649 workers were employed respectively in the printing and publishing industries. The distribution of employees according to the job level in the branches is as follows:

(A) *Printing Industry*

Job Level Branch	Technologist/ Managerial	Technician	Craftsman	Unskilled	Total	Percentage of Total Number of Employees
1. Newspaper Printing	17	88	309	110	524	3.0%
2. Job Printing	698	3 484	6 041	759	10 982	62.1%
3. Printing	88	490	576	139	1 293	7.3%
4. Manufacture of Containers and Boxes of Paper and Paperboard	13	43	242	38	336	1.9%
5. Printing Agents	458	2 567	47	31	3 103	17.5%
6. Selected Organizations	136	643	556	117	1 452	8.2%
Total	1 410	7 315	7 771	1 194	17 690	100%
Percentage of Total Number of Employees	8.0%	41.4%	43.9%	6.7%	100%	

(B) *Publishing Industry*

Branch \ Job Level	Managerial	Supervisory	Technical Staff	Total	Percentage of Total Number of Employees
1. Publishing of newspapers	358	845	1 988	3 191	30.0%
2. Publishing and Allied Industries	1 105	1 405	3 946	6 456	60.6%
3. Wholesales of Books, Periodicals and Newspapers	34	29	106	169	1.6%
4. Import and Export of Books, Periodicals and Newspapers	158	139	269	566	5.3%
5. Selected Organizations	54	134	79	267	2.5%
Total	1 709	2 552	6 388	10 649	100%
Percentage of Total Number of Employees	16.0%	24.0%	60.0%	100%	

4. Employers reported a total of 32 and 63 trainees, and 322 and 181 vacancies, representing about 0.2% and 0.6%, and 1.8% and 1.7% of the total workforce in the printing and publishing industries respectively at the time of survey. In addition, employers forecasted that by May 2015, the two industries would have a total workforce of 18 010 and 10 894 employees, representing increases of 1.8% and 2.3% respectively.

Manpower Changes

(A) *Printing Industry*

5. Compared with the findings of the 2012 survey on the printing industry, the annual decrease in manpower was 1.9%. The Training Board considers that the changes in manpower over the past two years are attributable to the followings:

- (a) The printing industry went through another difficult time since the last survey in May 2012. The survey revealed that the total number of establishments of the industry was 162 less than that in May 2012. As a whole, the survey showed an increase of 6.5% per annum in manpower at technologist/managerial level but an annual decrease of 4.2% and 0.7% of manpower at technician level and craftsman level respectively;
- (b) As usual, the industry in general could not recruit enough technical manpower. To cope with the situation and with more automation facilities installed, existing manpower had to take on more workload. The managers at technologist/managerial level had to perform some of the work usually carried by the technical manpower at the technician level. As a result, the general quality

and output of technical manpower had been enhanced;

- (c) Some companies performed the prepress work in the Mainland via the Internet. Subsequently, there was an annual decrease of 9.1%, 14.4% and 1.6% of manpower in IT Manager at technologist/managerial level, IT technicians at technician level and electronic prepress system craftsman at craftsman level respectively;
- (d) As a response to better service and to seek more business opportunities, there was a general manpower increase at managerial level except Procurement Manger and IT Manager (Printing); and
- (e) It also revealed that more companies had taken more digital business and less offset printing work that more digital printing system craftsmen and less related offset craftsmen were recorded. On the other hand, a high demand of printing pop-up books and other special feature books that an annual increase of 10.7% and 17.2% of manpower of other printing machine craftsmen and die cutting/tool making craftsmen respectively were collected.

(B) *Publishing Industry*

6. Compared with the findings of the 2012 survey on the publishing industry, the annual increase in manpower was 3.7%. The Training Board considers that the manpower expansion over the past two years is attributable to the followings:

- (a) The e-Publishing continued to grow in the past two years, which attracted many freelance writers and more startup set up for the e-publishing business. On-line publishing became more popular. More local newspapers, regional or even worldwide newspapers and major magazines provided on-line services. When compared with the figure of 2012, the survey revealed there were 57 more establishments in 2014.
- (b) The survey revealed that an increase of 3.6% and 6.6% per annum in manpower at managerial level and technical staff level respectively were recorded in the combined Branches 1 and 2 – Publishing of Newspapers and Publishing and Allied Industries. Such increase in manpower covered the loss of manpower at the three skill levels at the other three Branches (3 to 5). As a whole, the survey showed an increase of 2.3% and 14.1% per annual in manpower at managerial level and technical staff level respectively but an annual decrease of 12.8% of manpower at supervisory level;

- (c) For the same reason as in (a), a substantial annual increase of 31.6%, 22.7% and 31.6% of manpower in assistant editor/copy editor/ art editor/proof reader, art designer/ illustrator, and desktop publishing Operator at technical staff level;
- (d) On the other hand, the survey showed that a total of 1 453 employees from 520 establishments engaged in e-publishing (Table 2.32). When compared with the figures (988 employees and 273 establishments) in 2012 survey, there were 465 employees and 247 companies more in 2014 involved in e-publishing. However, an annual decrease of 30.3% of manpower of supervisor (e-Publishing) at supervisory level was recorded and there was same number of manpower of manager (e-Publishing) at managerial level. It revealed that duties concerning e-Publishing were spread out by other related principal jobs, like manager (e-Publishing) and commissioning editor at the above two levels; and
- (e) Over the two years, a substantial annual decrease of 12.8% of manpower at supervisory level. Among the principal jobs, the loss of sales supervisors and customer services supervisor/officer (books) was at a sharp annual decrease of 29.0% and 36.6% respectively. The high turnover rate of sales supervisors revealed that they could easy to seek other jobs in different trades. Their duties left behind were shared by circulation supervisor at the same level, marketing director/marketing manager at managerial level and marketing/publicity assistant at technical staff level, resulting an annual increase of 37.4%, 21.4% and 15.8% of manpower of the above three jobs respectively.

Conclusions and Recommendations

7. Hong Kong is still one of the major printing and publication centre in the world despite its printing and publishing industries had gone through another difficult time since the last survey in May 2012. The continuous increase of the appreciation of Renminbi, rise in wage, taxes and duties together with up and down of oil price, interest rate and currencies causing fluctuation of costs of energy and materials, which have imposed a great challenge to the two industries. The shortage of workers in the Pearl River Delta and the effect on implementation of the Mainland's Labour Contract Law as well as Processing Trade Policy form another threat and essential operating cost items. In the meantime, other than the Mainland enterprises, various Asian manufacturers have continuously posed a strong competition to Hong Kong printing firms. On the other side, the existing benefit of zero imported tariffs in the Mainland since the implementation of the seventh phase of the Mainland and Hong Kong Closer Economic Partnership Arrangement (CEPA VII) in May 2012, the reveal of China 12th Five-Year Plan in March 2013 and the Supplement IX to CEPA signed on 29 June 2012, will continue to provide considerable opportunities for Hong Kong firms and the two industries. In addition, the excellent local telecommunication networks are great assets of the printing and publishing industries that both industries can be benefited from the continuous development of digital printing and e-Publishing.

8. The world is facing a volatile economic situation. The United States Federal Reserve ended its huge bond-buying programme in end of October 2014 as a response to its growing economy and improved employment rate. In Europe, the weak economic growth with high unemployment rate and just negative consumer index made the European Central Bank launch a bond-buying stimulus programme in January 2015. With the aims to boost the sagging economy and to avoid deflation in Euro Zone, the European Central Bank would pump 600 billion euros a month into the economy until the end of September 2016. All the above situations will impose certain effects on the printing and publishing industries in the coming years. However, the reform and continuous development in the Mainland will bring more business opportunities to the world as well as the industries in Hong Kong. In view of the above, the Training Board has a cautious optimistic view that the printing industry will be in a steady situation while the publishing industry will have mild growth in the coming years. The Training Board also recommends the following measures for employers to consider coping with present situation and challenges ahead:

- (i) To keep a close check of the latest development of technologies related to the printing and publishing industries, especially the digital printing and electronic publishing;
- (ii) To adopt standardisations in processing/service and to streamline and diversify business to make company more flexible, effective and efficient than before;
- (iii) To develop more creative, value-added , cost effective, high quality and green products / services, especially in transmedia area, to increase competitive ability;
- (iv) To further strengthen the overall skill level and competency of the staff, especially the information technology skills, design and creativity skills, through appropriate training leading to become a much stronger and competitive organisation;
- (v) To carry on to explore new business in niche product markets and the most cost effective way so as to strengthen market share; and
- (vi) To continue to maintain and to deepen strong partnership with key customers and to establish new partnership with potential customers.

9. Regarding the strength of skill and competency of staff, the Training Board suggests that on top of the individual company's training needs, the "Employees' Training Needs" at Appendix 15 for the printing industry while Appendix 16 for the publishing industry will be a useful reference on various aspects of training for employers. In this particular situation, employers are recommended to step up their training efforts in order to ensure supply of well-equipped manpower to meet the challenges and business opportunities ahead. The Training Board also recommends the Vocational Training Council (VTC) and other training organizations to keep a close view on the above training needs of the printing and publishing industries and provide such needs in time.

10. The Training Board estimates that the additional numbers of workers required annually by the printing and publishing industries as a whole at various job levels are as follows:

<i>Job Level</i>	Additional manpower Required Annually	
	Printing Industry	Publishing Industry
Technologist/Managerial	84 (6.0%)	63 (3.7%)
Technician/Supervisory	222 (3.0%)	79 (3.1%)
Craftsman/Technical Staff	240 (3.0%)	223 (3.5%)

(Note: the numbers in brackets denote the percentages of the annual training requirements of manpower at the respective job levels).

11. The Training Board urges employers to step up their training efforts for a sustainable development of the printing and publishing industries. They should also make use of the part-time courses offered by the Department of Communication Design and Digital Media of Hong Kong Design Institute, the Pro-Act Training and Development Centre (Printing) and the Advanced Printing Technology Centre to upgrade their workforce. Employers are also encouraged to contact the Vocational Training Council to set up training schemes and to make use of the Earn and Learn Scheme for the printing industry and New Technology Training Scheme for training their employees in new technologies.

SECTION I

INTRODUCTION

The Training Board

1.1 The Printing and Publishing Training Board of the Vocational Training Council is required by its terms of reference to determine the manpower needs of the printing and publishing industries and to make recommendations to the Council for the development of training facilities to meet such needs. The membership and terms of reference of the Training Board are listed in Appendices 1 and 2 respectively.

The Survey

1.2 During the period from mid-May to mid-October 2014, the Training Board conducted a survey to collect up-to-date manpower information of the printing and publishing industries. The survey was carried out with the assistance of the Census and Statistics Department.

1.3 The following information was collected from the survey:

- (a) the number of employees employed at the time of the survey,
- (b) the number of employees under training,
- (c) the number of existing vacancies,
- (d) employers' forecast of the total number of employees by May 2015,
- (e) employers' views on the preferred education, training mode and training period of employees,
- (f) the average income of employees,
- (g) the number of employees promoted,
- (h) with production workshop in Mainland,
- (i) difficulties encountered in recruitment, and
- (j) employees' training needs.

1.4 Employers in the printing industry were further requested to provide information on the numbers of technologists/managers, technicians and craftsmen who had been deployed to work outside Hong Kong for more than 6 months during the 12 months prior to the survey.

Scope of Survey

1.5 The survey covered the following industries:

(A) ***Printing Industry***

Branch 1 -- Newspaper Printing (HSIC 581201)

Branch 2 -- Job Printing (HSIC 181100)

Branch 3 -- Printing (mainly bookbinding; ornamentation of cards; photo-engraving; typesetting; and label embossing etc.) (HSICs 181201, 181202 and 181299)

Branch 4 -- Manufacture of Containers and Boxes of Paper and Paperboard (for activities related to printing only) (HSICs 170201 and 170202)

Branch 5 -- Printing agents (HSIC 829300)

Branch 6 -- Selected Organisations of Printing Suppliers and Metal Can Printing Firms; and Printing Department of Academic Institutions

(B) ***Publishing Industry***

Branch 1 -- Publishing of Newspaper (HSIC 581201*)

Branch 2 -- Publishing and Allied Industries (HSICs 581100, 581202 and 581900)

Branch 3 -- Wholesales of Books, Periodicals and Newspapers (HSIC 460423)

Branch 4 -- Import and Export of Books, Periodicals and Newspapers (HSICs 451423 and 452423)

Branch 5 -- Publishing Departments of Selected Organisations

Note: 1. HSIC denotes Hong Kong Standard Industrial Classification
2. *newly added HSIC in the publishing industry from 2014

1.6 The selected organisations covered educational and training institutions offering courses in printing technologies, the printing sections of academic institutions and department/agencies of the Government of the Hong Kong Special Administrative Region, printing equipment suppliers, metal can manufacturers and companies as well as public bodies/organisations with publishing personnel.

1.7 Under the classifications mentioned in paragraph 1.5 above, there were 4 142 and 1 655 establishments respectively in printing and publishing industries recorded by the Census and Statistics Department. The distribution of establishments by HSIC Classification is shown in Tables 1.1 and 1.2 and Figures 1.1 and 1.2:

Table 1.1 : Distribution of Establishments by HSIC Classification in the Printing Industry

Branch		Number of Establishments	Percentage of Total Number of Establishments
1. Newspaper Printing	HSIC 581201	43	1.0%
2. Job Printing	HSIC 181100	2 280	55.0%
3. Printing	HSICs 181201, 181202 and 181299	281	6.8%
4. Manufacture of Containers and Boxes of Paper and Paperboard (only printing and related activities)	HSICs 170201 and 170202	174	4.2%
5. Printing Agents	HSIC 829300	1 301	31.4%
6. Selected Organizations		63	1.5%
Total		4 142	100%

Figure 1.1 : Distribution of Printing Establishments by Branch

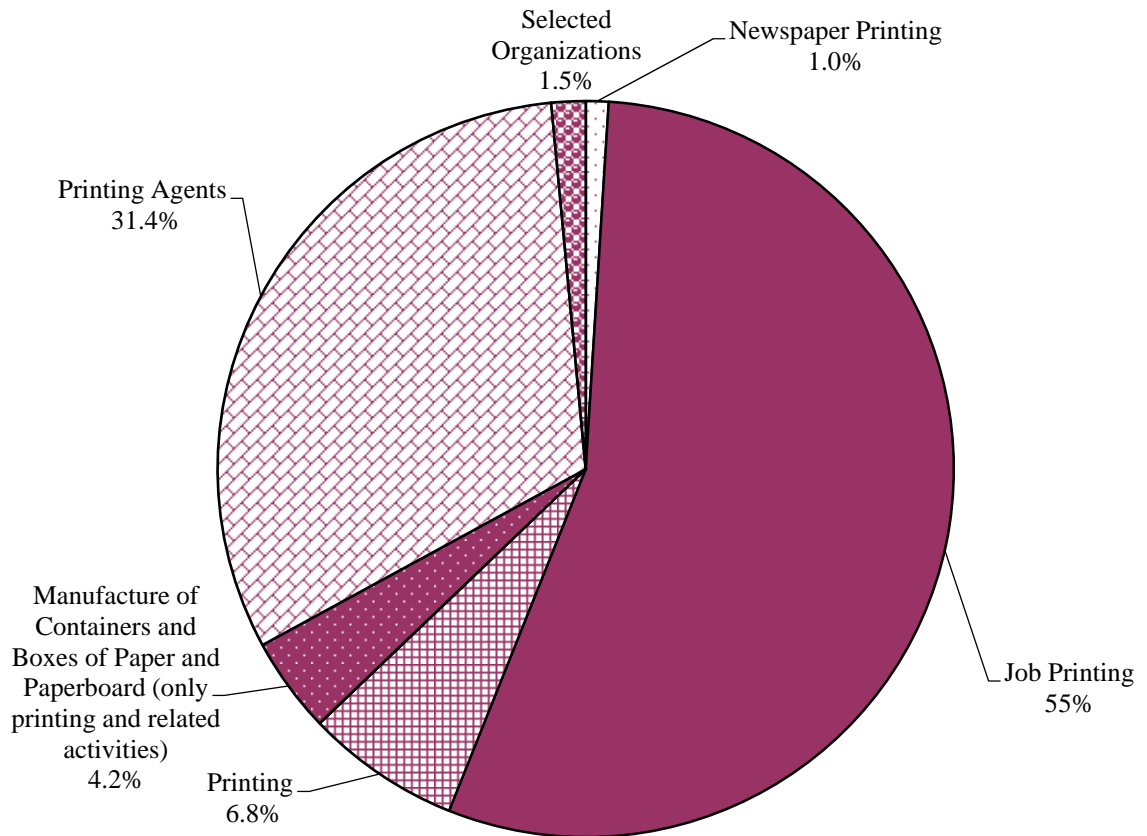
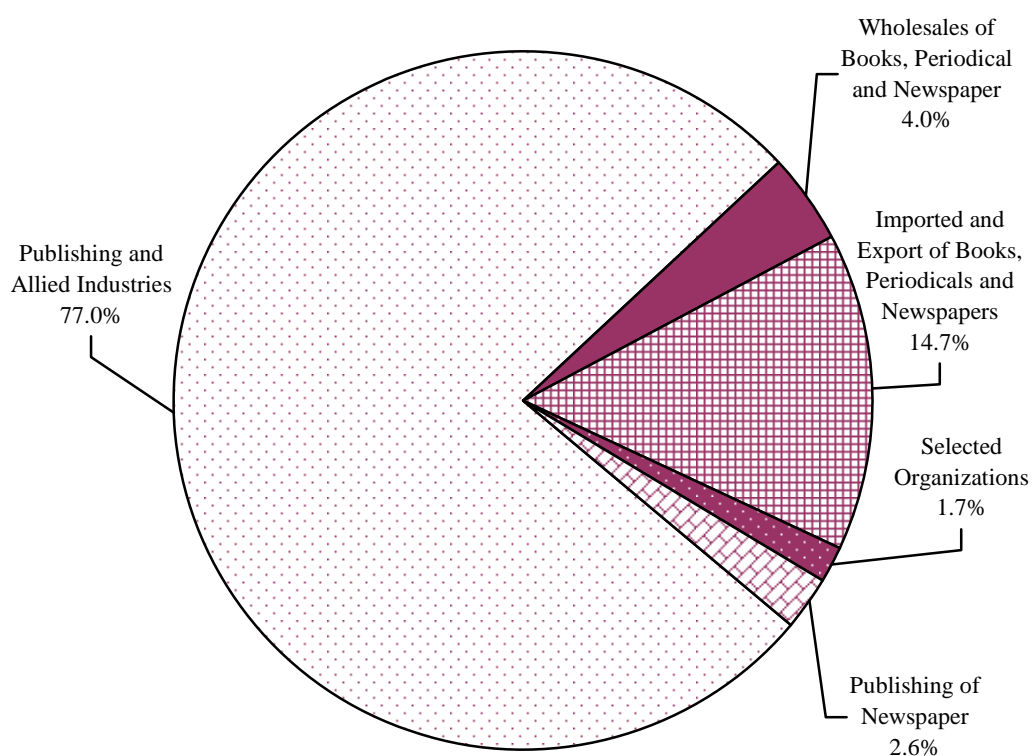


Table 1.2 : Distribution of Establishments by HSIC Classification in the Publishing Industry

Branch	Number of Establishments	Percentage of Total Number of Establishments
1. Publishing of Newspaper – HSIC 581201	43	2.6%
2. Publishing and Allied Industries – HSICs 58110, 581202 and 581900	1 274	77.0%
3. Wholesales of Books, Periodicals and Newspapers – HSIC 460423	67	4.0%
4. Import and Export of Books, Periodicals and Newspapers - HSICs 451423, 452423	243	14.7%
5. Selected Organisations	28	1.7%
Total	1 655	100%

Figure 1.2 : Distribution of Publishing Establishments by Branch



1.8 Owing to resources constraint, a stratified random sampling method was used to select samples for the survey fieldwork out of 629 printing and related establishments, including the educational and training institutions and the printing department/agencies of the Government of the Hong Kong Special Administrative Region and 275 establishments in the publishing industry.

Publicity

1.9 Prior to the fieldwork of the survey, publicity was placed in the local press. Assistance to solicit co-operation from their members was also given by the following associations:

- (a) The Hong Kong Printers Association,
- (b) Graphic Arts Association of Hong Kong Limited,
- (c) The Chinese Manufacturers' Association of Hong Kong,
- (d) Federation of Hong Kong Industries,
- (e) The Newspaper Society of Hong Kong,
- (f) The Hong Kong Association of Professional Education Publishing Limited, and
- (g) Hong Kong Publishing Professionals Society Limited.

Method of the Survey

1.10 Before the commencement of the fieldwork, copies of the questionnaires together with the explanatory notes and job descriptions of the principal jobs in the printing and publishing industries were sent to the selected establishments of the two industries (Appendices 3 and 4).

1.11 During the fieldwork, interviewers of the Census and Statistics Department visited the establishments to collect the completed questionnaires, and where required, they also answered queries and assisted in the completion of the questionnaires.

1.12 The data collected were checked and where necessary, confirmed with the respondents. The data were then scaled up statistically to reflect the overall picture of the manpower situation of the two industries.

Response to the Survey

1.13 Of the 904 establishments, 653 supplied their manpower information. 66 establishments either had closed, moved or were no longer engaged in work related to the printing and publishing industries. 32 establishments had declined to supply any information. The effective response rate was 95.3%.

The Report

1.14 This report presents the findings of the survey, the Training Board's forecast of the manpower needs of the printing and publishing industries and recommendations on measures to meet these needs. In the report, the terms "workforce", "employees" and "workers" refer to the total number of persons (excluding trainees and apprentices) employed in the 54 principal jobs; the term "trainees" includes all trainees receiving any form of training and apprentices undergoing an apprenticeship.

SECTION II

SURVEY FINDINGS

Number of Workers Employed

2.1 The survey revealed that during the period from mid-May to mid-October 2014, the printing and publishing industries employed a total of 17 690 and 10 649 employees in 26 and 27 principal jobs respectively. In terms of branches, there were 524 in Branch 1 - Newspaper printing, 10 982 in Branch 2 - Job printing, 1 293 in Branch 3 – Printing, 336 in Branch 4 – Manufacture of Containers and boxes of paper and paperboard, 3 103 in Branch 5 - Printing agents and 1 452 in Branch 6 - Selected Organisations in the printing industry. On the other hand, in the publishing industry, there were 3 191 in the new Branch 1 – Publishing of newspapers, 6 456 in Branch 2 - Publishing and allied industries, 169 in Branch 3 - Wholesales of Books, Periodicals and Newspapers, 566 in Branch 4 - Import and Export of Books, Periodicals and Newspapers and 267 in Branch 5 - Selected organizations. With regards to job level, there were 1 410 technologists/managers, 7 315 technicians, 7 771 craftsmen and 1 194 unskilled workers employed in the printing industry; whereas there were 1 709 managers, 2 552 supervisors, 6 388 technical staffs employees in the publishing industry. Details of the manpower statistics are shown in Appendices 5 and 6 respectively. The distribution of employees by branch and job level of the printing and publishing industries are shown in Tables 2.1 and 2.2 and Figures 2.1 to 2.4:

Table 2.1 : Distribution of Employees by Branch and Job Level in the Printing Industry

Job Level Branch	Technologist/ Managerial	Technician	Craftsman	Unskilled	Total	Percentage of Total Number of Employees
1.Newspaper Printing	17	88	309	110	524	3.0%
2.Job Printing	698	3 484	6 041	759	10 982	62.1%
3.Printing	88	490	576	139	1 293	7.3%
4.Manufacture of Containers and Boxes of Paper and Paperboard	13	43	242	38	336	1.9%
5.Printing Agents	458	2 567	47	31	3 103	17.5%
6.Selected Organisations	136	643	556	117	1 452	8.2%
Total	1 410	7 315	7 771	1 194	17 690	100%
Percentage of Total Number of Employees	8.0%	41.4%	43.9%	6.7%	100%	

Figure 2.1 : Distribution of Employees by Branch in the Printing Industry

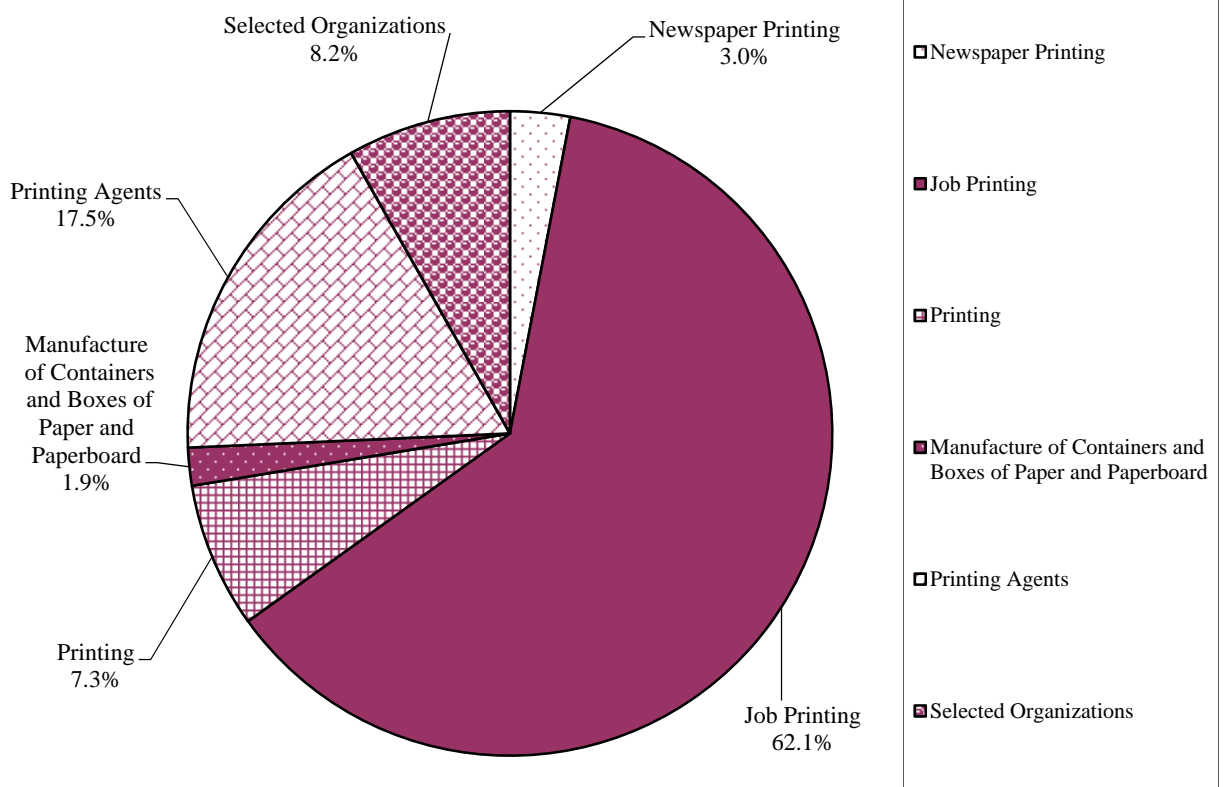


Figure 2.2 : Distribution of Employees by Job Level in the Printing Industry

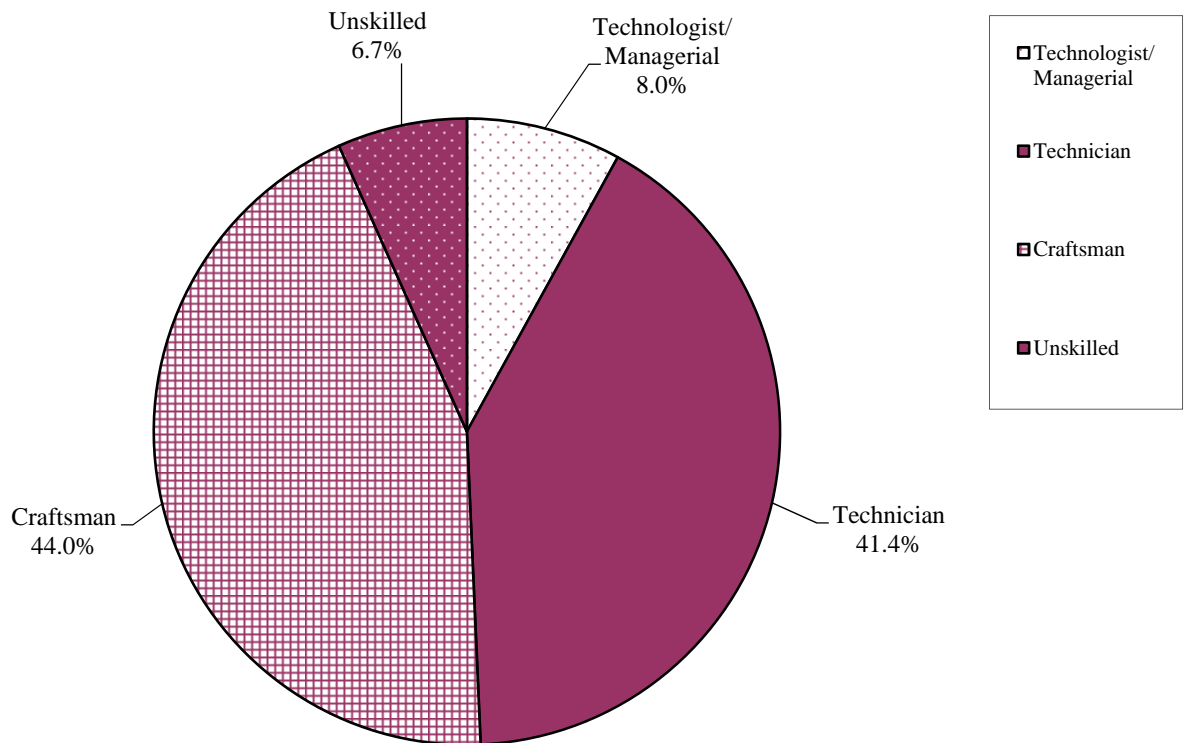


Table 2.2 : Distribution of Employees by Branch and Job Level in the Publishing Industry

Branch \ Job Level	Managerial	Supervisory	Technical Staff	Total	Percentage of Total Number of Employees
1. Publishing of Newspapers	358	845	1 988	3 191	30%
2. Publishing and Allied Industries	1 105	1 405	3 946	6 456	60.6%
3. Wholesales of Books, Periodicals and Newspapers	34	29	106	169	1.6%
4. Import and Export of Books, Periodicals and Newspapers	158	139	269	566	5.3%
5. Selected Organisations	54	134	79	267	2.5%
Total	1 709	2 552	6 388	10 649	100%
Percentage of Total Number of Employees	16.0%	24.0%	60.0%	100%	

Figure 2.3 : Distribution of Employees by Branch in the Publishing Industry

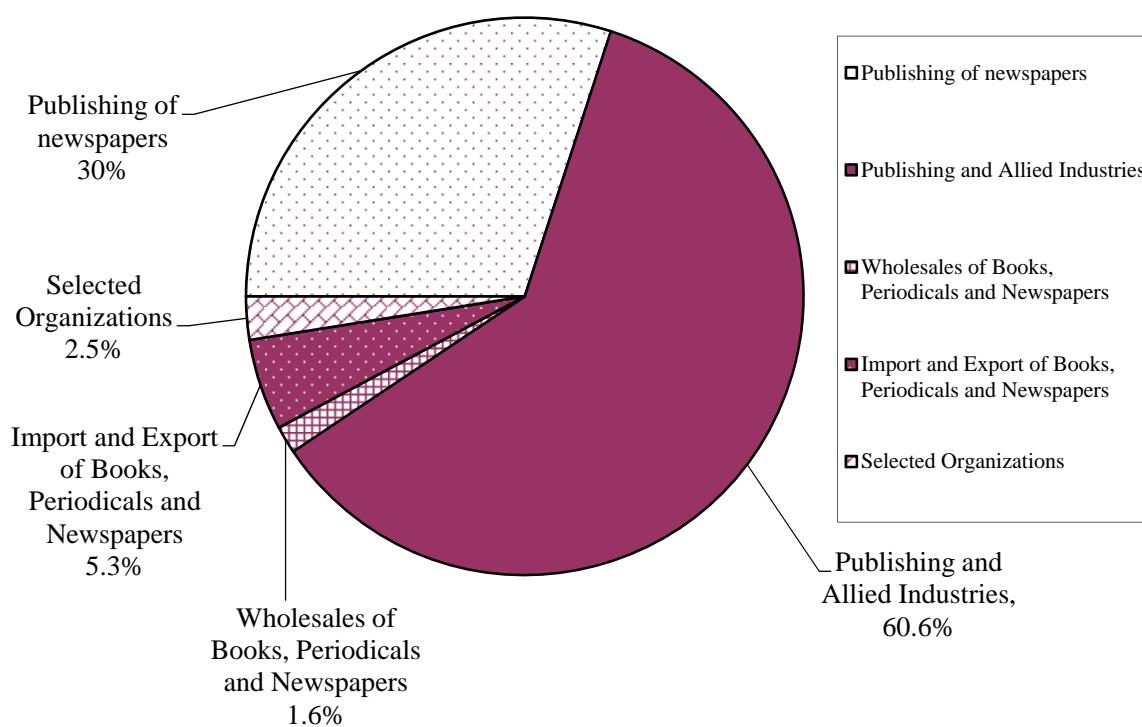
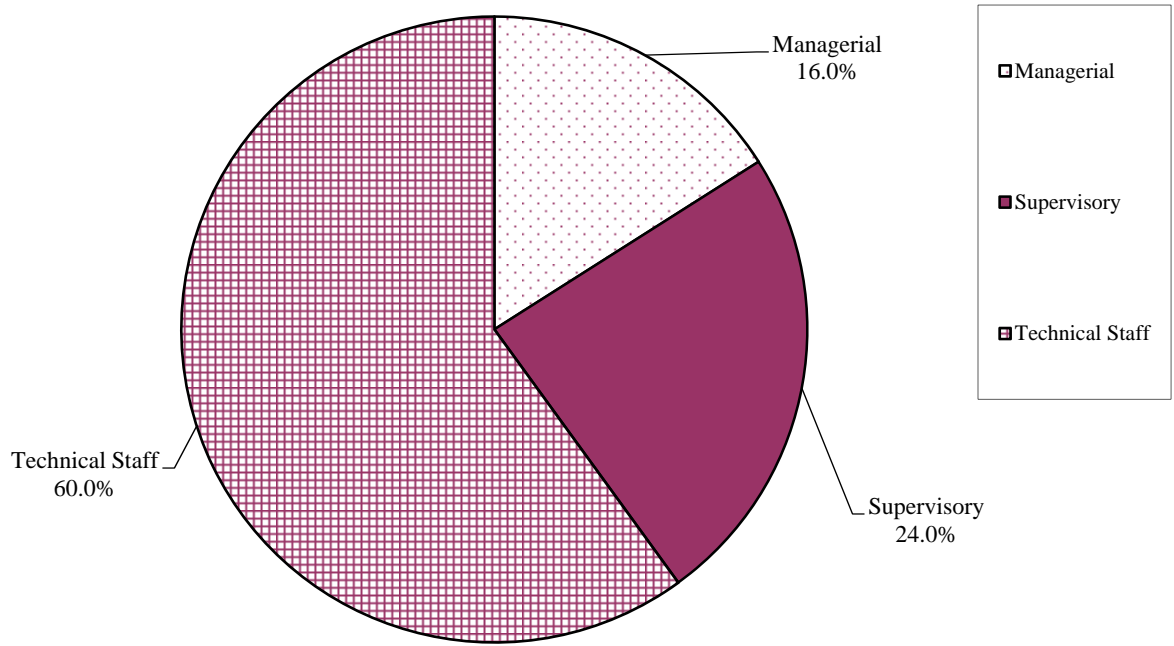


Figure 2.4 : Distribution of Employees by Job Level in the Publishing Industry



2.2 The distribution of employees by job levels on the past surveys conducted by the former Printing Industry Training Board and Advertising, Public Relations and Publishing Training Board and the current Training Board for the printing and publishing industries is shown in Tables 2.3 and 2.4 and Figures 2.5 and 2.6:

Table 2.3 : Distribution of Employees by Job Level in the Manpower Surveys of the Printing Industry between 1990 and 2014

Year	Manpower at					Total Manpower
	*Technologist/ Managerial Level	Technician Level	Craftsman Level	Operative Level	Unskilled Level	
1990	-	4 351	17 929	2 898	2 817	27 995
1992	-	3 549	18 408	3 622	2 915	28 494
1994	-	4 747	19 930	3 367	2 660	30 704
1996	-	6 157	16 226	2 928	3 715	29 026
1998	165	4 758	14 639	2 222	3 133	24 917
2000	445	5 656	13 729	2 266	1 893	23 989
2002	729	5 466	11 935	2 082	1 334	21 546
2004	759	6 208	11 816	860	1 579	21 222
2006	1 185	7 544	11 370	-	1 214	21 313
2008	1 385	8 382	11 508	-	1 203	22 478
2010	1 661	8 733	9 643	-	1 111	21 148
2012	1 243	7 962	7 891	-	1 269	18 365
2014	1 410	7 315	7 771	-	1 194	17 690

* The survey of technologist/managerial level was first started in 1998 and was widened to cover more principal jobs at the technologist/managerial level in the subsequent surveys. The principal jobs at the operative level were deleted in the 2006 survey.

Figure 2.5 : Distribution of Employees by Job Level in the Manpower Surveys of the Printing Industry between 1990 and 2014

No. of Employees

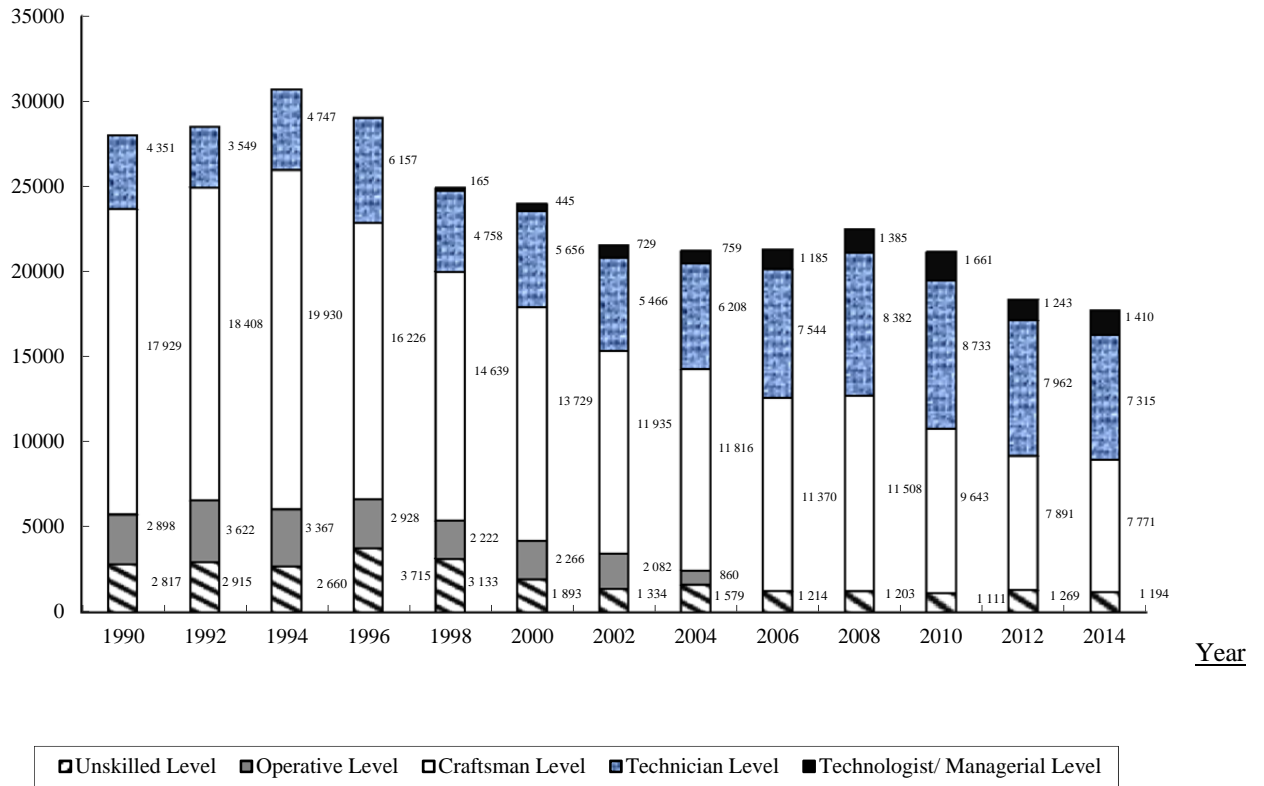
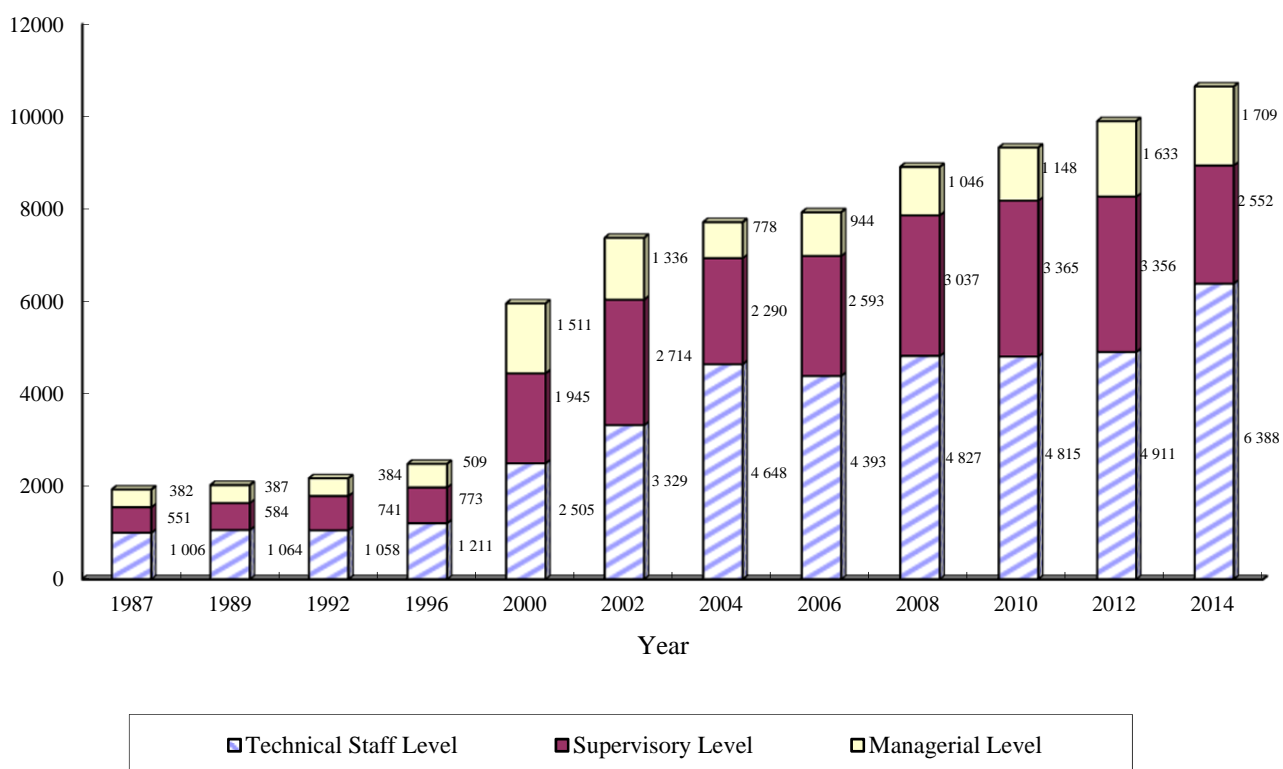


Table 2.4 : Distribution of Employees by Job Level in the Manpower Surveys of the Publishing Industry between 1987 and 2014

Year	Manpower at			Total Manpower
	Managerial Level	Supervisory Level	Technical Staff Level	
1987	382	551	1 006	1 939
1989	387	584	1 064	2 035
1992	384	741	1 058	2 183
1996	509	773	1 211	2 493
2000	1 511	1 945	2 505	5 961
2002	1 336	2 714	3 329	7 379
2004	778	2 290	4 648	7 716
2006	944	2 593	4 393	7 930
2008	1 046	3 037	4 827	8 910
2010	1 148	3 365	4 815	9 328
2012	1 633	3 356	4 911	9 900
2014	1 709	2 552	6 388	10 649

Figure 2.6 : Distribution of Employees by Job Level in the Manpower Surveys of the Publishing Industry between 1987 and 2014

No. of Employees



Number of Trainees

2.3 At the time of the survey, there were 32 and 63 trainees representing 0.2% and 0.6% of the total number employed in the printing and publishing industries. Details of the trainee statistics are shown in Appendices 5 and 6. The distribution of trainees by branch and job level in the printing and publishing industries is shown in Tables 2.5 and Table 2.6:

Table 2.5 : Distribution of Trainees in the Printing Industry

Job Level Branch	Technologist/ Managerial	Technician	Craftsman	Unskilled	Total	Percentage of Total Number of Employees at the Same Branch
1. Newspaper Printing	-	-	-	-	-	-
2. Job Printing	4	13	13	-	30	0.3%
3. Printing	-	-	-	-	-	-
4. Manufacture of Containers and Boxes of Paper and Paperboard	-	-	-	-	-	-
5. Printing Agents	-	-	-	-	-	-
6. Selected Organizations	-	-	2	-	2	0.1%
Total	4	13	15	-	32	0.2%
Percentage of Total Number of Employees at the Same Level	0.3%	0.2%	0.2%	-	0.2%	

Table 2.6 : Distribution of Trainees in the Publishing Industry

Branch \ Job Level	Managerial	Supervisory	Technical Staff	Total	Percentage of Total Number of Employees at the Same Branch
1. Publishing of newspapers	-	-	6	6	0.2%
2. Publishing and Allied Industries	-	-	56	56	0.9%
3. Wholesales of Books, Periodicals and Newspapers	-	-	-	-	-
4. Import and Export of Books, Periodicals and Newspapers	-	-	-	-	-
5. Selected Organisations	-	-	1	1	0.4%
Total	-	-	63	63	0.6%
Percentage of Total Number of Employees at the Same Level	-	-	1.0%	0.6%	

Number of Vacancies

2.4 At the time of survey, the total number of job vacancies was 322 and 181, or 1.8% and 1.7% of the total number employed in the printing and publishing industries respectively. Details of vacancies statistics are shown in Appendices 5 and 6 respectively. The distribution of vacancies by branch and by job level is shown below in Tables 2.7 and 2.8:

Table 2.7 : Distribution of Vacancies by Branch and by Job Level in the Printing Industry

Branch \ Job Level	Technologist/ Managerial	Technician	Craftsman	Unskilled	Total	Percentage of Total Number of Employees at the Same Branch
1. Newspaper Printing	-	1	17	-	18	3.4%
2. Job Printing	1	48	140	26	215	2.0%
3. Printing	-	2	7	1	10	0.8%
4. Manufacture of Containers and Boxes of Paper and Paperboard	-	-	30	-	30	8.9%
5. Printing Agents	-	16	-	1	17	0.5%
6. Selected Organisations	-	6	10	16	32	2.2%
Total	1	76	201	44	322	1.8%
Percentage of Total Number of Employees at the Same Level	0.1%	1.0%	2.6%	3.7%	1.8%	

Table 2.8 : Distribution of Vacancies by Branch and by Job Level in the Publishing Industry

Branch \ Job Level	Managerial	Supervisory	Technical Staff	Total	Percentage of Total Number of Employees at the Same Branch
1. Publishing of newspapers	1	-	-	1	0.03%
2. Publishing and Allied Industries	2	74	97	173	2.7%
3. Wholesales of Books, Periodicals and Newspapers	-	-	2	2	1.2%
4. Import and Export of Books, Periodicals and Newspapers	-	-	5	5	0.9%
5. Selected Organisations	-	-	-	-	-
Total	3	74	104	181	1.7%
Percentage of Total Number of Employees at the Same Level	0.2%	2.9%	1.6%	1.7%	

Forecast Workforce by May 2015

2.5 Employers forecast that there would be 18 010 and 10 894 employees employed in the printing and publishing industries respectively by May 2015. Details of forecast workforce for the printing industry and publishing industry are shown in Appendices 5 and 6. The employers' forecasts by job level are shown below in Tables 2.9 and 2.10:

Table 2.9 : Employers' Manpower Requirement by May 2014 and Manpower Forecast by May 2015 in the Printing Industry

Job Level	Number of Employees Employed at Time of Survey	Number of Vacancies	Total Manpower Requirement at Time of Survey	Forecast of Total Number of Employees by May 2015	Forecast Increase (+)/ Decrease (-) in Number of Employees
Technologist/ Managerial	1 410	1	1 411	1 413	+ 2
Technician	7 315	76	7 391	7 415	+ 24
Craftsman	7 771	201	7 972	7 951	- 21
Unskilled	1 194	44	1 238	1 231	- 7
Total	17 690	322	18 012	18 010	- 2

Figure 2.7 : Comparison of Employers' Manpower Requirement by May 2014 and May 2015

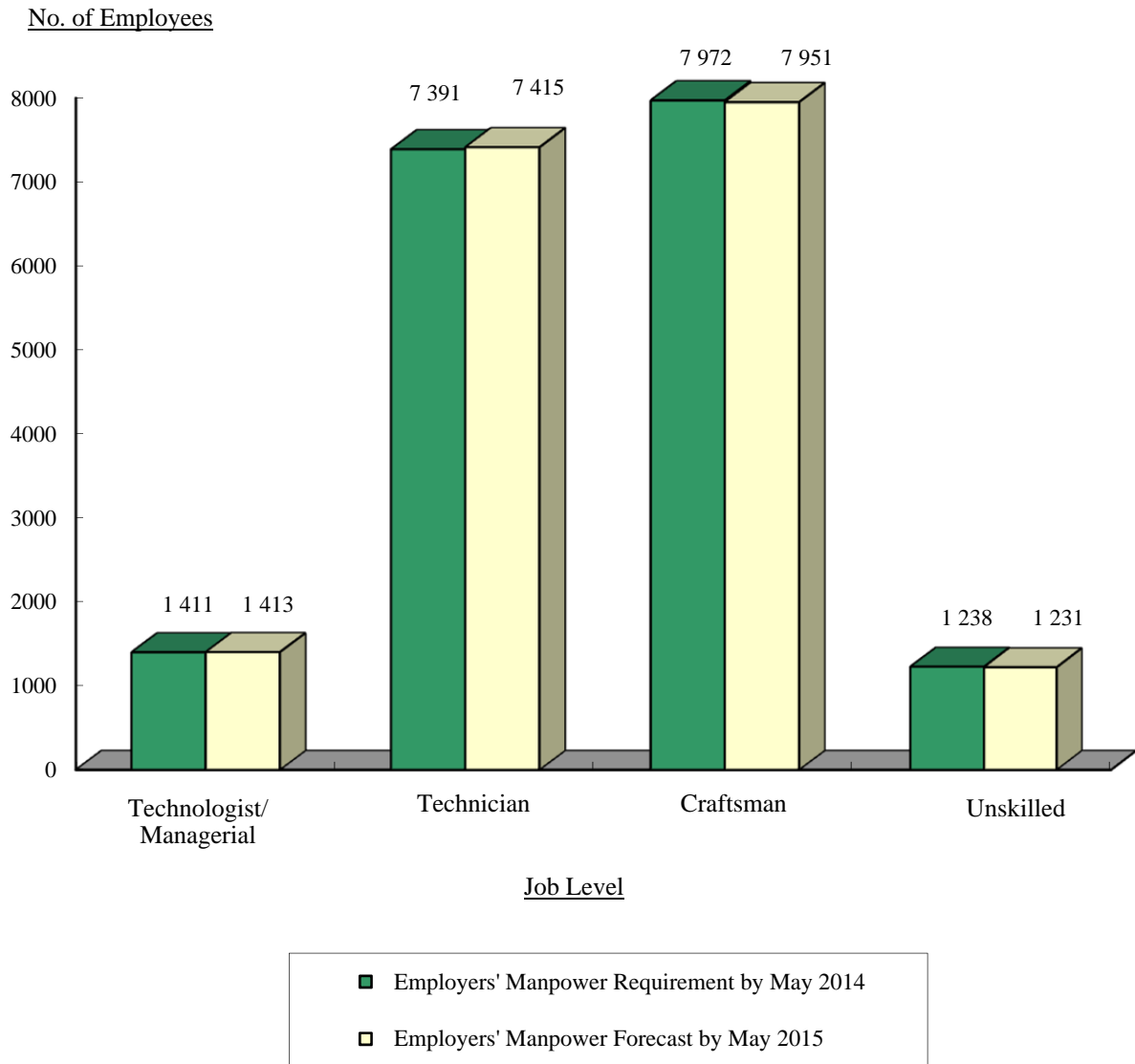
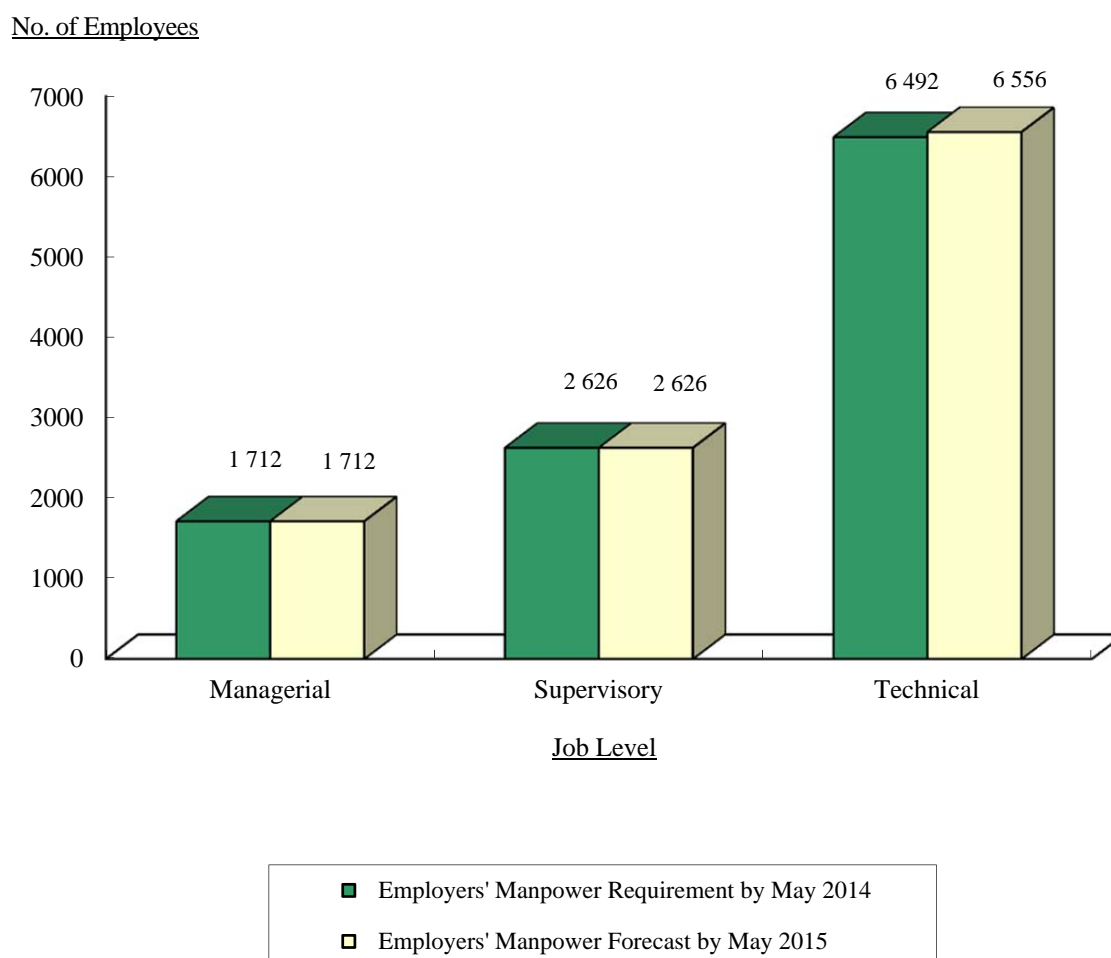


Table 2.10 : Employers' Manpower Requirement by May 2014 and Manpower Forecast by May 2015 in Publishing Industry

Job Level	Number of Employees Employed at Time of Survey	Number of Vacancies	Total Manpower Requirement at Time of Survey	Forecast of Total Number of Employees by May 2015	Forecast Increase (+)/ Decrease (-) in Number of Employees
Managerial	1 709	3	1 712	1 712	-
Supervisory	2 552	74	2 626	2 626	-
Technical Staff	6 388	104	6 492	6 556	+ 64
Total	10 649	181	10 830	10 894	+ 64

Figure 2.8 : Comparison of Employers' Manpower Requirement by May 2014 and May 2015



Preferred Education

2.6 The majority views of employers in the printing and publishing industries on the preferred education of their employees at each job level are shown in Tables 2.11 and 2.12:

Table 2.11 : Employers' Views on Preferred Education in the Printing Industry

Job Level	Preferred Education
Technologist/ Managerial	Degree/ Diploma
Technician	Certificate/ Secondary 4 to 7/ Hong Kong Diploma of Secondary Education or equivalent
Craftsman	Craft Certificate/ Secondary 3 or below

Table 2.12 : Employers' Views on Preferred Education in the Publishing Industry

Job Level	Preferred Education
Managerial	Degree
Supervisory	Degree
Technical Staff	Diploma/ Higher Certificate

2.7 Details of employers' views in the printing industry and publishing industry are shown in Appendices 7 and 8 respectively.

Preferred Period of Training

2.8 The majority views of employers in the printing and publishing industries on the preferred period of training for their employees at each job level are shown in Tables 2.13 and 2.14:

Table 2.13 : Employers' Views on Preferred Period of Training in the Printing Industry

Job Level	Preferred Period of Training
Technologist/ Managerial	4 years or above
Technician	2 to 3 years
Craftsman	1 to 2 years

Table 2.14 : Employers' Views on Preferred Period of Training in the Publishing Industry

Job Level	Preferred Period of Training
Managerial	4 years or above
Supervisory	2 to 3 years
Technical Staff	2 to 3 years

2.9 Details of employers' views in the printing industry and publishing industry are shown in Appendices 9 and 10 respectively.

Preferred Mode of Training

2.10 The majority views of employers in the printing and publishing industries on the mode of training for their employees at each level are shown in Tables 2.15 and 2.16:

Table 2.15 : Employers' Views on Preferred Mode of Training in the Printing Industry

Job Level	Preferred Mode of Training
Technologist/ Managerial	On-the-job training
Technician	On-the-job training
Craftsman	Apprenticeship/ On-the-job training

Table 2.16 : Employers' Views on Preferred Mode of Training in the Publishing Industry

Job Level	Preferred Mode of Training
Managerial	On-the-job training
Supervisory	On-the-job training
Technical Staff	On-the-job training

2.11 Details of employers' views in the printing industry and publishing industry are shown in Appendices 11 and 12 respectively.

Total Monthly Income Range of Employees

2.12 The distribution of employees by total monthly range in the two industries is shown in Tables 2.17 and 2.18:

Table 2.17 : Distribution of Employees by Total Monthly Income Range in the Printing Industry

Job Level	\$8,000 or below	\$8,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$30,000	\$30,001 - \$45,000	\$45,001 - \$60,000	\$60,001 or Above	Unspecified	Total
Technologist / Managerial	-	1	24	89	498	415	77	48	258	1 410
Technician	32	236	2 545	2 760	682	100	14	4	942	7 315
Craftsman	51	802	5 011	959	65	-	-	-	883	7 771
Unskilled	128	668	181	-	-	-	-	-	217	1 194
Total	211	1 707	7 761	3 808	1 245	515	91	52	2 300	17 690
Total Number of Employees in Percentage	1.2%	9.6%	43.9%	21.5%	7.0%	2.9%	0.5%	0.3%	13.0%	100%

Table 2.18 : Distribution of Employees by Total Monthly Income Range in the Publishing Industry

Job Level	\$8,000 or below	\$8,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$30,000	\$30,001 - \$45,000	\$45,001 - \$60,000	\$60,001 or Above	Unspecified	Total
Managerial	56	-	-	40	99	577	272	102	563	1 709
Supervisory	-	7	17	570	928	271	43	6	710	2 552
Technical Staff	-	140	1 794	2 236	293	-	-	-	1 925	6 388
Total	56	147	1 811	2 846	1 320	848	315	108	3 198	10 649
Total Number of Employees in Percentage	0.5%	1.4%	17.0%	26.7%	12.4%	8.0%	3.0%	1.0%	30.0%	100%

2.13 Details of monthly income range of employees in the printing industry and publishing industry are shown in Appendices 13 and 14 respectively.

Technical and Non-technical Staff

2.14 The distribution of technical and non-technical staff in the printing and publishing industries is shown below in Table 2.19:

Table 2.19 : Distribution of Technical and Non-technical Staff in the Printing and Publishing Industries

	<u>Technical Staff</u>	<u>Non-technical Staff</u>	<u>Total</u>	<u>Percentage of Technical Staff</u>
Printing Industry	17 690	5 144	22 834	77.5%
Publishing Industry	10 649	8 650	19 299	55.2%
Total	28 339	13 794	42 133	67.3%

Employers' Views on the Expected Change in Business Situations for the Coming Year

2.15 The survey revealed that about 62.8% and 76.8% of the employers in the printing and publishing industries respectively had forecasted the business situations would be either the same or better in the coming year. The distribution of employers' view is shown in Tables 2.20 and 2.21.

Table 2.20 : Views of Employers in the Printing Industry on the Business Situation for the Coming Year

Employment Size	Business Situation				
	Better	Same	Worse	Unspecified	Total
1 - 9	40	1 947	1 218	21	3 226
10 - 49	37	276	132	4	449
50 & Over	8	35	9	7	59
All	85	2 258	1 359	32	3 734
Percentage of Firms	2.3%	60.5%	36.4%	0.9%	100%

**Table 2.21 : Views of Employers in the Publishing Industry
on the Business Situation for the Coming Year**

Employment Size	Business Situation				
	Better	Same	Worse	Unspecified	Total
1 - 9	90	675	175	32	972
10 - 49	8	115	44	7	181
50 & Over	9	35	8	15	67
All	107	825	227	54	1 213
Percentage of Firms	8.8%	68.0%	18.7%	4.5%	100%

***Employees Deployed to Work outside Hong Kong
in the Printing Industry***

2.16 Employers reported the following number of employees who had been deployed to work outside Hong Kong more than 6 months during the 12 months prior to the survey:

**Table 2.22 : Number of Employees Deployed to Work Outside
Hong Kong in the Printing Industry**

Job Level	Number of Employees	Total Number of Employees at the Same Job Level	Percentage of Total Number of Employees at the Same Job Level
Technologist/Managerial	183	1 410	13.0%
Technician	183	7 315	2.5%
Craftsman	2	7 771	0.03%
Total	368	16 496	2.2%

***Establishments with Production Workshops
in Mainland China in the Publishing Industry***

2.17 The survey revealed that among 1 213 Hong Kong publishing companies, 75 of them operated with production workshops in Mainland China and employed 391 Mainland employees. The later figure does not include employees who are Hong Kong residents. The distribution of the Mainland employees by job level is as below:

**Table 2.23 : Number of Employees in Mainland China
in the Publishing Industry**

Job Level	Number of Employees in Mainland China	Number of Employees in Hong Kong
Managerial	55	1 709
Supervisory	138	2 552
Technical Staff	198	6 388
Total	391	10 649

Employees Promoted in the Printing Industry

2.18 The survey revealed that 79 employees were promoted in the printing industry. The distribution of the employees promoted in the printing industry is as below:

**Table 2.24 : Number of Employees Promoted in the
Printing Industry**

Branch \ Job Level	Technologist/ Managerial	Technician	Craftsman	Total
1. Newspaper Printing	-	-	-	-
2. Job Printing	17	19	31	67
3. Printing	-	4	-	4
4. Manufacture of Containers and Boxes of Paper and Paperboard	1	-	-	1
5. Printing Agents	-	-	-	-
6. Selected Organisations	3	4	-	7
Total	21	27	31	79

Employees Promoted in the Publishing Industry

2.19 The survey revealed that 78 employees were promoted in the publishing industry. The distribution of the employees promoted in the publishing industry is as below:

Table 2.25 : Number of Employees Promoted in the Publishing Industry

Branch \ Job Level	Managerial	Supervisory	Technical Staff	Total
1. Publishing of newspapers	3	18	-	21
2. Publishing and Allied Industries	15	27	-	42
3. Wholesales of Books, Periodicals and Newspapers	-	1	-	1
4. Import and Export of Books, Periodicals and Newspapers	6	7	0	13
5. Selected Organisations	-	-	1	1
Total	24	53	1	78

Employers' Major Difficulties in Recruitment in the Printing Industry

2.20 Employers reported the following information on the major recruitment difficulties encountered in the printing industry:

Table 2.26 : Number of Companies Facing Difficulties in Recruitment in the Printing Industry

Branch	Companies Facing Difficulties in Recruitment	Companies Not Facing Difficulties in Recruitment	No Recruitment in the Past 12 Months
1. Newspaper Printing	1	-	3
2. Job Printing	234	99	1 283
3. Printing	15	23	217
4. Manufacture of Containers and Boxes of Paper and Paperboard	12	-	120
5. Printing Agents	18	60	1 314
6. Selected Organisations	9	5	36
Total	289	187	2 973

Table 2.27 : Major Difficulties in Recruitment in the Printing Industry

Reasons Job Level	Candidates Lacked the Relevant Skills/ Expertise	Candidates Lacked the Relevant Experience	Candidates Lacked the Relevant Academic Qualification	Candidates Language Skills were Poor	Candidates Found the Remuneration Package Not Attractive	Candidates were unwilling to work on Shift	Candidates were unwilling to work in Mainland China	Others	Total
Technologist / Managerial	3	8	1	1	4	-	1	-	18
Technician / Supervisory	53	55	1	2	28	4	2	46	191
Craftsman	125	128	-	-	127	28	-	47	455
Total	181	191	2	3	159	32	3	93	664

Employers' Major Difficulties in Recruitment in the Publishing Industry

2.21 Employers reported the following information on the major recruitment difficulties encountered in the publishing industry:

Table 2.28 : Number of Companies Facing Difficulties in Recruitment in the Publishing Industry

Branch	Companies Facing Difficulties in Recruitment	Companies Not Facing Difficulties in Recruitment	No Recruitment in the Past 12 Months
1. Publishing of newspapers	4	15	12
2. Publishing and Allied Industries	164	75	691
3. Wholesales of Books, Periodicals and Newspapers	3	-	55
4. Import and Export of Books, Periodicals and Newspapers	8	3	101
5. Selected Organisations	-	5	12
Total	179	98	871

Table 2.29 : Major Difficulties in Recruitment in the Publishing Industry

Branch \ Reasons	Candidates Lacked the Relevant Skills/ Expertise	Candidates Lacked the Relevant Experience	Candidates Lacked the Relevant Academic Qualification	Candidates Language Skills were Poor	Candidates Found the Remuneration Package Not Attractive	Candidates were unwilling to work on Shift	Candidates were unwilling to work in Mainland China	Others	Total
Managerial	4	4	-	2	-	-	-	2	12
Supervisory	67	80	1	3	13	1	-	2	167
Technical Staff	96	68	3	1	34	3	1	6	212
Total	167	152	4	6	47	4	1	10	391

Employees' Training Needs in the Printing Industry

2.22 The three most important skills/ knowledge that employees need to enhance in the next 12 months in response to the various changes in printing industry are shown below:

Table 2.30 : Three Important Employees' Training Needs in the Printing Industry

Job Level	The 3 most important skills/knowledge that employees need to enhance	
	Order	Skills/Knowledge
Technologist/ Managerial	1	Marketing Management
	2	Production Management
	3	Customer Services
Technician/ Supervisory	1	Customer Services
	2	Pre-press Technique
	3	Production Management
Craftsman	1	Printing Technique
	2	Pre-press Technique
	3	Production Management/ Quality Management

Employees' Training Needs in the Publishing Industry

2.23 The three most important skills/ knowledge that employees need to enhance in the next 12 months in response to the various changes in publishing industry are shown below:

Table 2.31 : Three Important Employees' Training Needs in the Publishing Industry

Job Level	The 3 most important skills/knowledge that employees need to enhance	
	Order	Skills/Knowledge
Managerial	1	Marketing Management
	2	Production Management
	3	Media Technology
Supervisory	1	Artwork/ Design
	2	Media Technology
	3	Editing
Technical Staff	1	Media Technology
	2	Computer Graphics & Webpage Design/ Artwork/ Design
	3	Editing

2.24 Details of the skills/knowledge that employees need to enhance in the printing industry and publishing industry are shown in Appendices 15 and 16 respectively.

Engagement in Electronic Publishing in the Publishing Industry

2.25 The survey revealed that in the publishing industry, 512 establishments engaged in electronic publishing of the type of online publishing (476 establishments) and CD-ROM (44 establishments). Also, 691 establishments did not engage in electronic publishing. Details of employees engaged in electronic publishing are shown below:

Table 2.32 : Employees Engaged in Electronic Publishing in Publishing Industry

Branch	No. of Establishments		No. of Employees
	Online Publishing	CD-ROM	
1. Publishing of Newspapers	28	-	217
2. Publishing and Allied Industries	433	42	1 147
3. Wholesales of Books, Periodicals and Newspapers	-	-	-
4. Import and Export of Books, Periodicals and Newspapers	2	-	1
5. Selected Organisations	13	2	88
Total	476	44	1 453

2.26 Among the total number of 1 453 employees engaged in electronics publishing, only 96 (26 Manager (e-Publishing)) and 70 Supervisor (e-Publishing)) of them, as shown in Appendix 6, were solely involved in electronics business, while the other 1 357 (1 453 – 96) also performed other publishing activities in their serving establishments.

SECTION III

CONCLUSIONS

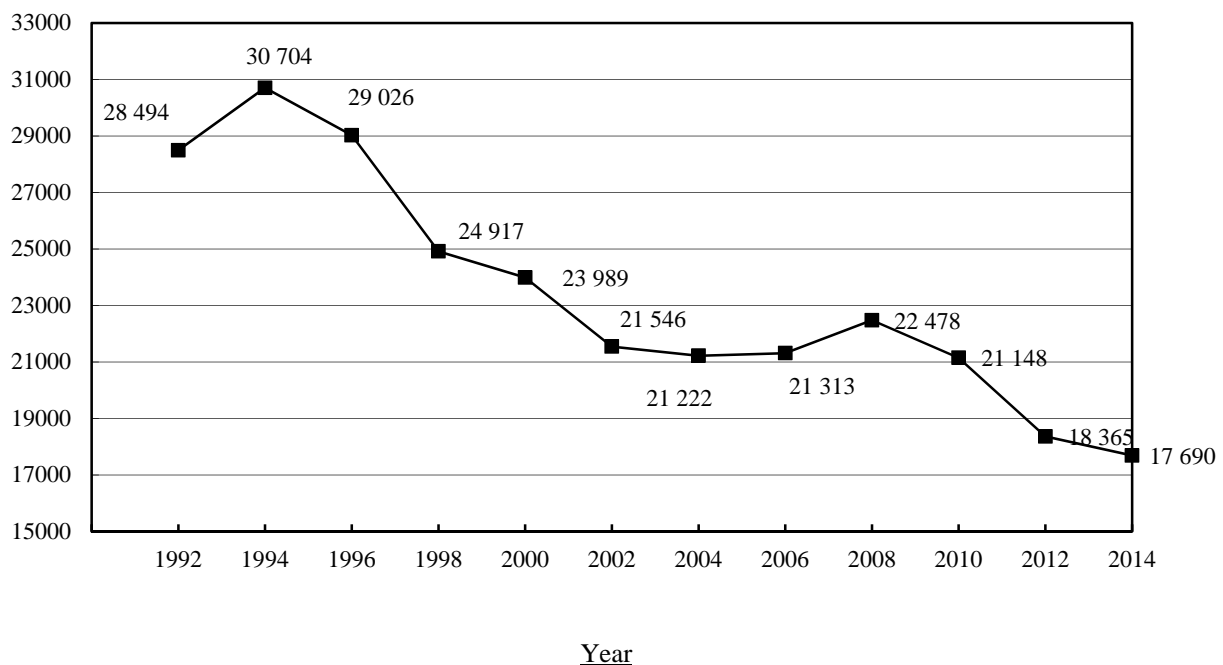
3.1 The Training Board has carefully examined the survey findings and considered that they generally reflect the employment situation of the printing and publishing industries at the time of the survey.

3.2 The survey revealed that the printing industry's workforce had decreased at an annual rate of 1.9% from 18 365 employees to 17 690 employees since the last survey conducted in May 2012. On the other hand, the workforce of the publishing industry had increased at an annual rate of 3.7% from 9 900 employees to 10 649 employees since the last survey. Figures 3.1 and 3.2 show the manpower situation of the printing industry and the publishing industry between 1992 and 2014:

(A) *Printing Industry*

**Figure 3.1 : Manpower Situation of the Printing Industry
Between 1992 and 2014**

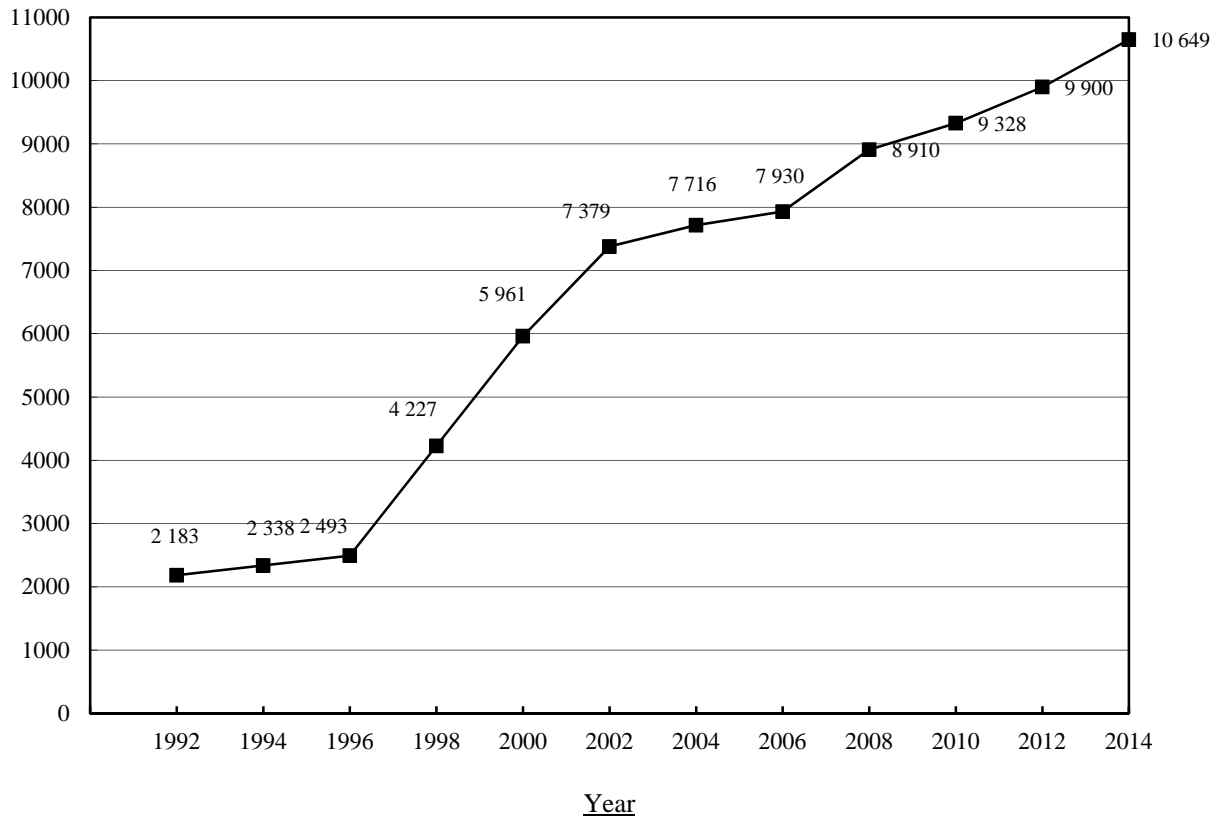
Number of Employees



(B) *Publishing Industry*

Figure 3.2 : Manpower Situation of the Publishing Industry Between 1992* and 2014

Number of Employees

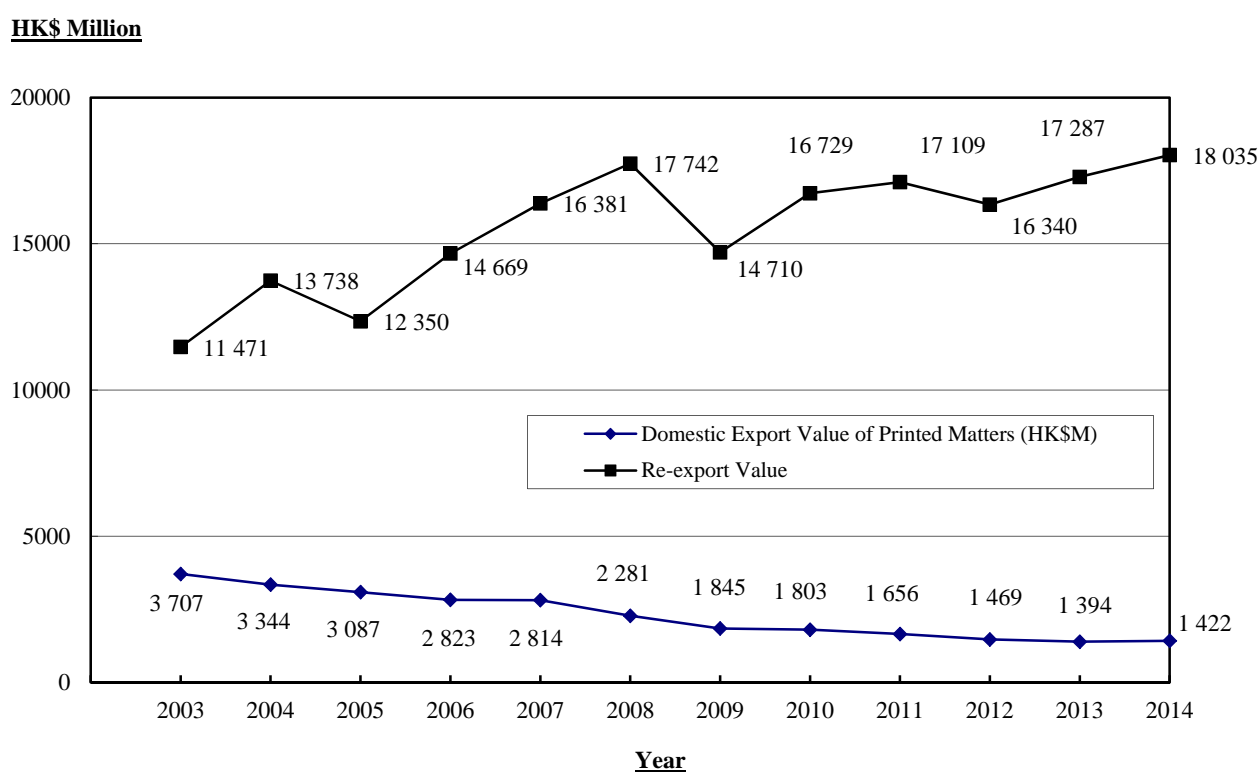


* The surveys from 2000 covered a wider scope than the previous surveys in 1992 and 1996 conducted by the former Advertising, Public Relations and Publishing Training Board.

Performance of the Printing Industry

3.3 The domestic export value of printed matters in year 2000 recorded a total of HK\$4,578 million, and it gradually decreased to HK\$1,845 million in 2009 and HK\$1,394 million in 2013. On the other hand, the re-export value of printed matters showed ups and downs between years 2003 and 2012 with the range of HK\$11,471 million (in 2003) and HK\$17,742 million (in 2008). It picked up the rise again in 2013 and the value in 2014 went up to HK\$18,035 million. The performance of the domestic export value of printed matters between 2003 and 2014 is shown in Figure 3.3.

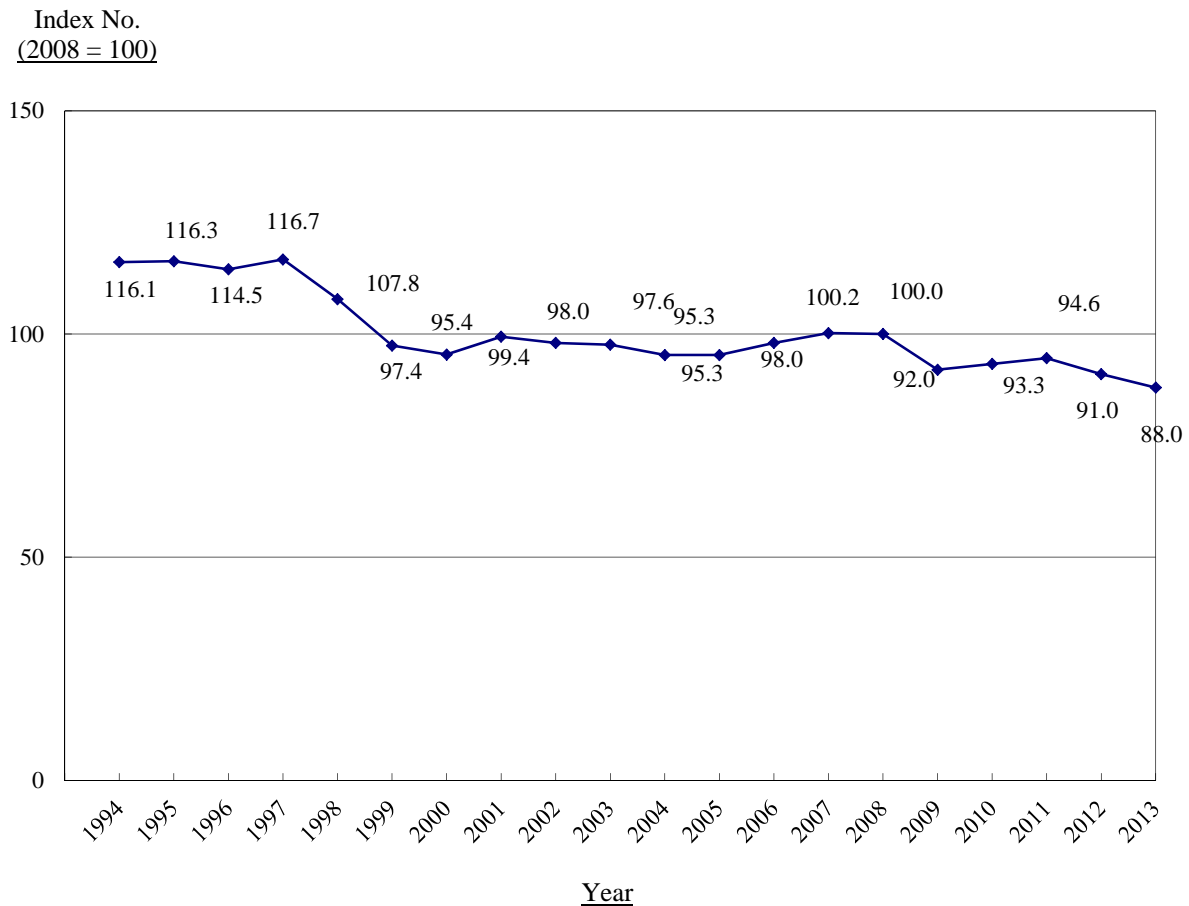
Figure 3.3 : Domestic Export and Re-export Value of Printed Matters between 2003 and 2014



Source: Hong Kong Trade Statistics, Census and Statistics Department

3.4 The production index of the industry decreased from 100 in the base year of 2008 to 88 in 2013, representing a decrease in production for paper products and printed matters in the local industry in the past few years (see Figure 3.4 below).

Figure 3.4 : Paper Products and Printing Matters – Index of Industrial Production



Source : Census and Statistics Department

Note : The production index measures the change in local manufacturing output in real terms, i.e. changes in volume of local production after discounting the effect of price changes. As from the third quarter of 2008, the base year of the index the industrial production has been changed to 2008.

3.5 The data in paragraphs 3.3 & 3.4 reflect the continuous shifting of printing activities to the Mainland, and that the transfer process has been stabilized.

Manpower Changes by Branch

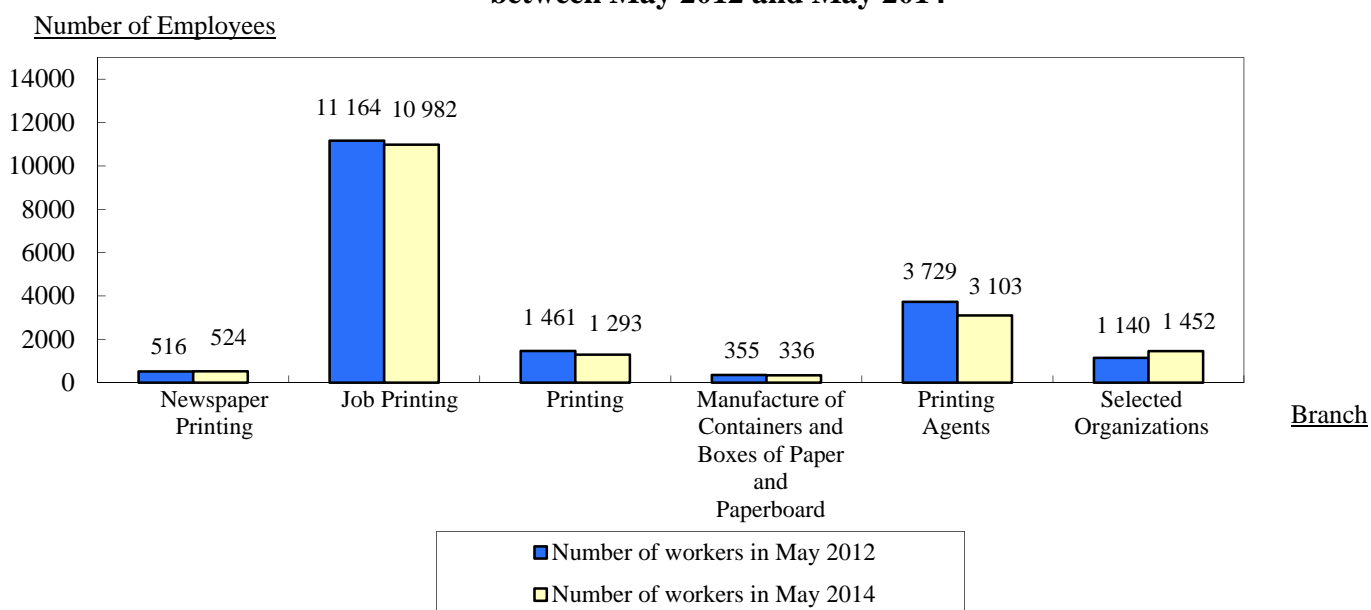
(A) Printing Industry

3.6 A breakdown of the manpower changes by branch in the printing industry between May 2012 and May 2014 is shown in Table 3.1 and Figure 3.5:

Table 3.1 : Breakdown of Manpower Changes by Branch in the Printing Industry Between May 2012 and May 2014

Branch	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
1. Newspaper Printing	516	524	+ 0.8%
2. Job Printing	11 164	10 982	- 0.8%
3. Printing	1 461	1 293	- 5.9%
4. Manufacture of Containers and Boxes of Paper and Paperboard	355	336	- 2.7%
5. Printing Agents	3 729	3 103	- 8.8%
6. Selected Organisations	1 140	1 452	+ 12.9%
Total	18 365	17 690	- 1.9%

Figure 3.5 : Manpower Changes by Branch in the Printing Industry between May 2012 and May 2014



3.7 The survey revealed that the technical manpower of Branch 6 - Selected organizations had increased 12.9% per annum from 1 140 in May 2012 to 1 452 in May 2014. This was attributable to more metal can printing firms equipped with digital printing facilities employed more technical manpower, especially craftsmen to engage in related business.

3.8 Since the last survey conducted in May 2012, the printing industry went through a difficult time. The domestic export value of printed matters dropped from HK\$1 845 million in 2009 to HK\$1 422 million in 2014 (in Paragraph 3.3) showing the situation. The total number of establishments in the Branch 2 to 5 surveyed in May 2014 was 4 036, which was 167 less than that in May 2012. Subsequently, less manpower was engaged in the printing industry causing an annual decrease from 0.8% to 8.8% in the four branches.

3.9 With the benefits of a high degree of freedom for the press as well as well established and efficient telecommunication networks, many international publishers and news agencies have set up offices in Hong Kong. Also, with the continuous growth of e-Publishing, readers can subscribe and read newspapers, magazines books and other information on websites via smart electronics devices. The number of readers to purchase or read printed materials decreased in the past few years. As a result, this caused the decrease in number of manpower of the related branches of the printing industry.

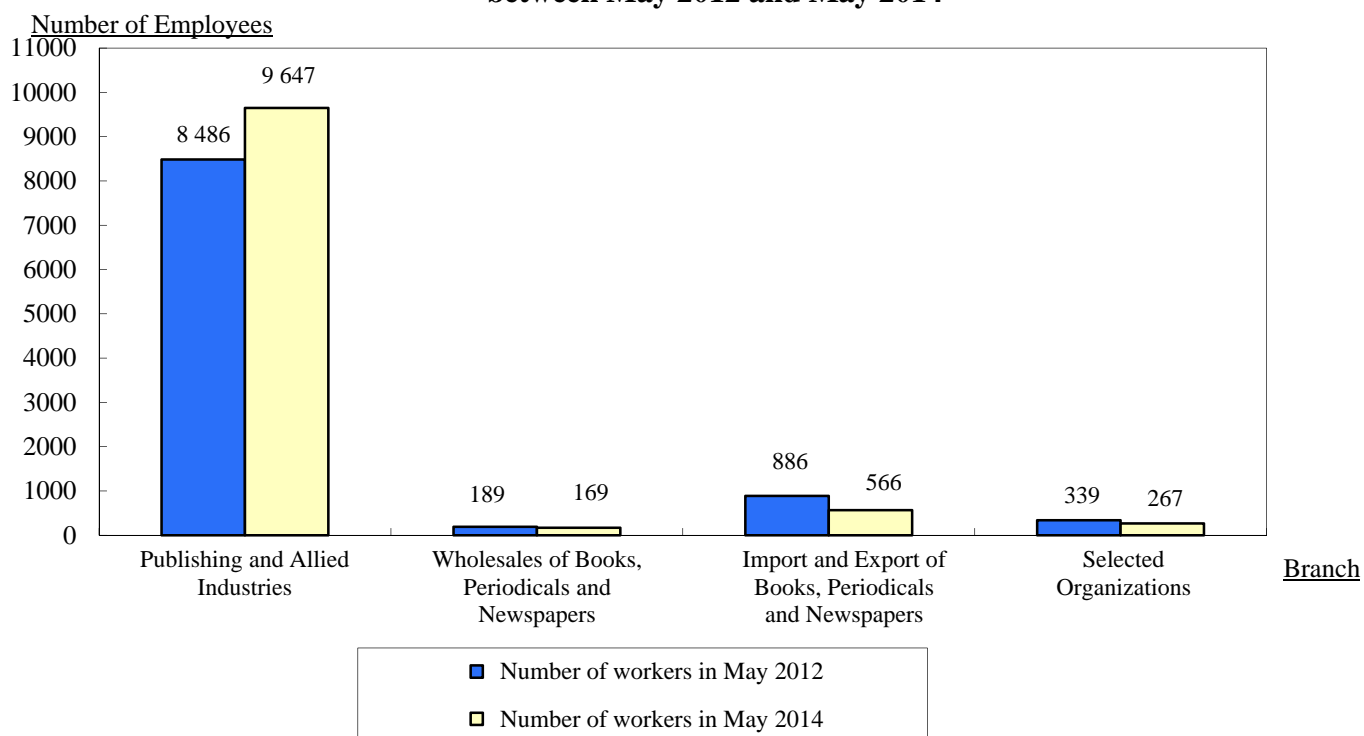
(B) **Publishing Industry**

3.10 A breakdown of the manpower changes by branch in the publishing industry between May 2012 and May 2014 is shown in Table 3.2 and Figure 3.6:

Table 3.2: Manpower Changes by Branch in the Publishing Industry between May 2012 and May 2014

Branch	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
1 and 2. Publishing of newspaper and Allied Industries	8 486	9 647	+ 6.6%
3. Wholesales of Books, Periodicals and Newspapers	189	169	- 5.4%
4. Import and Export of Books, Periodicals and Newspapers	886	566	- 20.1%
5. Selected Organizations	339	267	- 11.3%
Total	9 900	10 649	+ 3.7%

Figure 3.6 : Manpower Changes by Branch in the Publishing Industry between May 2012 and May 2014



3.11 Although Branch 1 – Publishing of Newspapers was first included in the 2014 manpower survey, the manpower of most of the newspaper companies selected in this survey were also included in Branch 2 – Publishing and Allied Industries of the previous surveys. In view of the above and for a better manpower comparison between 2014 and 2012, it is suggested to add the manpower of Branch 1 into Branch 2 in the 2014 survey. As a result, the findings revealed that there was an annual increase of 6.6% of manpower of the combined Branch 2 - Publishing and Allied Industries from 8 486 in May 2012 to 9 647 in May 2014. The increase was mainly due to an increase of 74 establishments in the Branch, resulting significant increase in technical staff and slightly manpower increase at managerial level. On the other hand, a decrease of 15 establishments in Branch 5 – Selected Organisations made a significant annual decrease of 11.3% of manpower from 339 in 2012 down to 267 in 2014. There was a substantial annual decrease of 20.1% of manpower in Branch 3 - Wholesales of Books, Periodicals and Newspaper from 189 in 2012 down to 169 in 2014. This was attributable to decrease in number of readers. For the same reason, an annual decrease of manpower of 5.4% in Branch 4 - Import and Export of Books, Periodicals and Newspapers from 339 in 2012 down to 267 in 2014.

Manpower Changes by Job Level in the Printing Industry

The Industry

3.12 The survey showed that a slightly annual decrease of 1.9% of manpower in the whole printing industry. In the past years, it was difficult to recruit technical manpower in the industry and with the installation of more automatic facilities, existing manpower had to take in more duties. As a result, the quality of the manpower had been enhanced. The manpower changes by job level in the printing industry between 2012 and 2014 are shown in Table 3.3:

**Table 3.3 : Manpower Changes by Job Level
in the Printing Industry
between May 2012 and May 2014**

Job Level	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
Technologist/Managerial	1 243	1 410	+ 6.5%
Technician	7 962	7 315	- 4.2%
Craftsman	7 891	7 771	- 0.8%
Unskilled	1 269	1 194	- 3.0%
Total	18 365	17 690	- 1.9%

Technologist/Managerial Level

3.13 The survey revealed an increase of 6.5% per annum in manpower for the technologist/managerial level from 1 243 in 2012 to 1 410 in 2014. A breakdown of the manpower changes is shown in Table 3.4:

Table 3.4 : Manpower Changes by Principal Job at Technologist/Managerial Level between May 2012 and May 2014

Principal Job	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
General Manager	345	363	+ 2.6%
Production Manager/ Quality Manager	313	346	+ 5.1%
Sales/Customer Services/ Marketing Manager	526	650	+ 11.2%
Procurement Manager	36	32	- 5.7%
IT Manager (Printing)	23	19	- 9.1%
Total	1 243	1 410	+ 6.5%

Technician Level

3.14 The printing industry went through another difficult time since last survey in 2012. There was an annual manpower decrease in every principal job at technician level. The survey revealed a decrease in the number of technicians, from 7 962 in May 2012 to 7 315 in May 2014. A breakdown of the manpower changes is shown in Table 3.5:

Table 3.5 : Manpower Changes by Principal Job at Technician Level between May 2012 and May 2014

Principal Job	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
Cost Estimator/ Sales Representative	4 459	4 435	- 0.3%
Production Planner/ Controller/ Quality Controller	616	600	- 1.3%
Overseer/ Supervisor	507	400	- 11.2%
Electrical & Mechanical Maintenance Technician (Printing)	325	297	- 4.4%
Designer/Design Officer	475	470	- 0.5%
Prepress Technician and Information Technology (Printing) Technician	1 238	908	- 14.4%
Purchasing Officer/ Controller	156	103	- 18.7%
Technical Services/Products (Printing) Technician	186	102	- 25.9%
Total	7 962	7 315	- 4.2%

Craftsman and Operative Levels

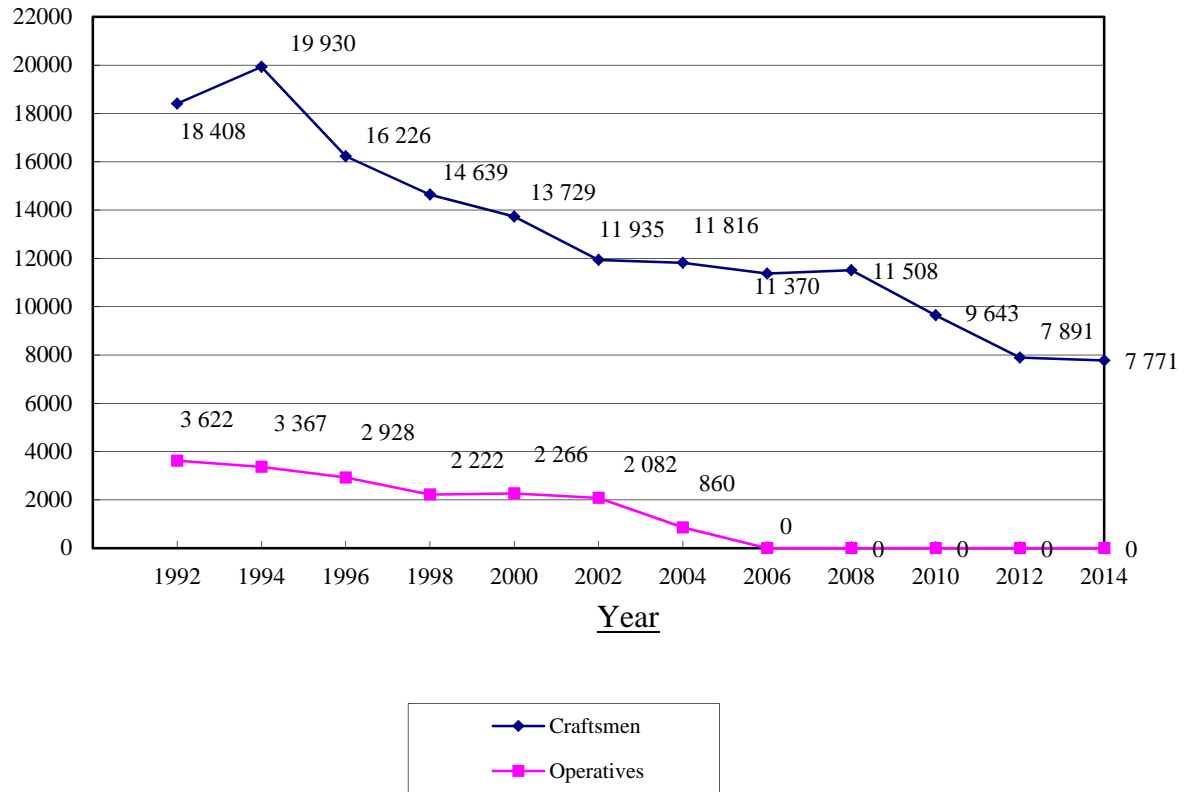
3.15 The survey also showed that there was a decrease of 0.8% per annum in the number of craftsmen between the two years. The jobs from operative levels were deleted from the survey since 2006. Details of the manpower changes are depicted in Table 3.6 and Figure 3.7:

Table 3.6: Manpower Changes by Principal Job at Craftsman Level between May 2012 and May 2014

Principal Job	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
Electronic Prepress System Craftsman	626	606	- 1.6%
Offset Lithographic Platemaker	848	602	- 15.7%
Digital Printing System Craftsman	421	699	+ 28.9%
Printing Machine Craftsman (Offset Litho) (Sheet-fed)	3 174	2 886	- 4.6%
Printing Machine Craftsman (Offset Litho) (Web-fed)	696	673	- 1.7%
Other Printing Machine Craftsman	399	489	+ 10.7%
Binding Craftsman	1 036	1 027	- 0.4%
Die Cutting / Tool Making Craftsman	214	294	+ 17.2%
Package Finishing Machine Craftsman	171	141	- 9.2%
Other Print Finishing Craftsman	306	354	+ 7.6%
Sub-total	7 891	7 771	- 0.8%

Figure 3.7 : Manpower Changes at Craftsman and Operative Levels between June 1992 and May 2014

Number of Workers



Manpower Changes by Job Level in the Publishing Industry

3.16 The manpower changes by job level in the publishing industry between 2012 and 2014 are shown in Table 3.7:

Table 3.7 : Manpower Changes by Job Level in the Publishing Industry between May 2012 and May 2014

Job Level	No. of Employees in May 2012	No. of Employees in May 2014	Change Per Annum
Managerial	1 633	1 709	+2.3%
Supervisory	3 356	2 552	-12.8%
Technical Staff	4 911	6 388	+14.1%
Total	9 900	10 649	+3.7%

Managerial Level

3.17 The survey revealed an annual increase of 2.3% in the number of managers. A breakdown of the manpower changes is shown in Table 3.8:

Table 3.8 : Manpower Changes by Principal Job at Managerial Level between May 2012 and May 2014

Principal Job	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
Managing Director/ General Manager/Publisher	354	368	+ 2.0%
Editorial Director/Chief Editor	409	333	- 10.0%
Design Director/Art Director	142	172	+ 10.1%
# Production Director/ Production Manager	83	109	+ 14.6%
Marketing Director/ Marketing Manager	200	268	+ 15.8%
Sales Director/Sales Manager (Newspaper and Magazine Publications)	210	197	- 3.1%
Sales Director/Sales Manager (Book Publications)	95	101	+ 3.1%
Editorial Manager	114	135	+ 8.8%
* Manager (E-publishing)	26	26	0%
Total	1 633	1 709	+ 2.3%

Same job nature as the principal job of "Production Manager" in the printing industry.

* Additional principal job since May 2012.

Supervisory Level

3.18 The survey also revealed a substantial decrease of 12.8% annually in the number of supervisors. A breakdown of the manpower changes is shown in Table 3.9:

Table 3.9 : Manpower Changes by Principal Job at Supervisory Level between May 2012 and May 2014

Principal Job	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
Commissioning Editor/ Acquisition Editor	193	151	- 11.5%
Senior Editor	1 121	820	- 14.5%
Designer	570	446	- 11.5%
# Production Supervisor	125	151	+ 9.9%
Sales Supervisor	770	388	- 29.0%
Marketing/Publicity Supervisor	202	286	+ 19.0%
Customer Services Supervisor/Officer (Books)	132	53	- 36.6%
Circulation Supervisor (Magazine & Newspapers)/	99	187	+ 37.4%
* Supervisor (E-publishing)	144	70	- 30.3%
Total	3 356	2 552	- 12.8%

Same job nature as the principal job of “Overseer/Supervisor” in the printing industry.

* Additional principal job since May 2012.

Technical Staff Level

3.19 The survey revealed that there was a substantial annual increase of 14.1% of manpower at technical staff level over the past two years. A breakdown of the manpower changes is shown in Table 3.10:

Table 3.10 : Manpower Changes by Principal Job at Technical Staff Level between May 2012 and May 2014

Principal Job	Number of Employees in May 2012	Number of Employees in May 2014	Change Per Annum
Assistant Editor/Copy Editor/ Art Editor/Proof Reader	1 569	2 719	+ 31.6%
Art Designer/ Illustrator	582	876	+ 22.7%
△ Desktop Publishing (DTP) Operator	411	712	+ 31.6%
# Production Assistant	297	287	- 1.7%
Sales Representative/ Sales Executive	1 588	1 120	- 16.0%
Marketing/Publicity Assistant	445	656	+ 21.4%
Other Publishing Related Jobs (Programmer and Designer / Cartography)	19	18	- 2.7%
Total	4 911	6 388	+ 14.1%

Same job nature as the craftsman in the printing industry.

△ Same job nature as “Electronic Prepress System Craftsman” in the printing industry.

Manpower Changes

3.20 The changes in the number of employees in the printing and publishing industries over the past two years are analyzed as follows:

(A) Printing Industry

- (a) The printing industry went through another difficult time since the last survey in May 2012. The survey revealed that the total number of establishments of the industry was 162 less than that in May 2012. As a whole, the survey showed an increase of 6.5% per annum in manpower at technologist/managerial level but an annual decrease of 4.2% and 0.7% of manpower at technician level and craftsman level respectively;

- (b) As usual, the industry in general could not recruit enough technical manpower. To cope with the situation and with more automation facilities installed, existing manpower had to take on more workload. The managers at technologist/managerial level had to perform some of the work usually carried by the technical manpower at the technician level. As a result, the general quality and output of technical manpower had been enhanced;
- (c) Some companies performed the prepress work in the Mainland via the Internet. Subsequently, there was an annual decrease of 9.1%, 14.4% and 1.6% of manpower in IT Manager at technologist/managerial level, IT technicians at technician level and electronic prepress system craftsman at craftsman level respectively;
- (d) As a response to better service and to seek more business opportunities, there was a general manpower increase at managerial level except Procurement Manger and IT Manager (Printing); and
- (e) It also revealed that more companies had taken more digital business and less offset printing work that more digital printing sysem craftsmen and less related offset craftsmen were recorded. On the other hand, a high demand of printing pop-up books and other special feature books that an annul increase of 10.7% and 17.2% of manpower of other printing machine craftsmen and die cutting/tool making craftsmen respectively were collected.

(B) *Publishing Industry*

- (a) The e-Publishing continued to grow in the past two years, which attracted many freelance writers and more startup set up for the e-publishing business. On-line publishing became more popular. More local newspapers, regional or even worldwide newspapers and major magazines provided on-line services. When compared with the figure of 2012, the survey revealed there were 57 more establishments in 2014.
- (b) The survey revealed that an increase of 3.6% and 6.6% per annum in manpower at managerial level and technical staff level respectively were recorded in the combined Branches 1 and 2 – Publishing of Newspapers and Publishing and Allied Industries. Such increase in manpower covered the loss of manpower at the three skill levels at the other three Branches (3 to 5). As a whole, the survey showed an increase of 2.3% and 14.1% per annum in manpower at managerial level and technical staff level respectively but an annual decrease of 12.8% of manpower at supervisory level;

- (c) For the same reason as in (a), a substantial annual increase of 31.6%, 22.7% and 31.6% of manpower in assistant editor/copy editor/ art editor/proof reader, art designer/illustrator, and desktop publishing Operator at technical staff level;
- (d) On the other hand, the survey showed that a total of 1 453 employees from 520 establishments engaged in e-publishing (Table 2.32). When compared with the figures (988 employees and 273 establishments) in 2012 survey, there were 465 employees and 247 companies more in 2014 involved in e-publishing. However, an annual decrease of 30.3% of manpower of supervisor (e-Publishing) at supervisory level was recorded and there was same number of manpower of manager (e-Publishing) at managerial level. It revealed that duties concerning e-Publishing were spread out by other related principal jobs, like manager (e-Publishing) and commissioning editor at the above two levels; and
- (e) Over the two years, a substantial annual decrease of 12.8% of manpower at supervisory level. Among the principal jobs, the loss of sales supervisors and customer services supervisor/officer (books) was at a sharp annual decrease of 29.0% and 36.6% respectively. The high turnover rate of sales supervisors revealed that they could easy to seek other jobs in different trades. Their duties left behind were shared by circulation supervisor at the same level, marketing director/marketing manager at managerial level and marketing/publicity assistant at technical staff level, resulting an annual increase of 37.4%, 21.4% and 15.8% of manpower of the above three jobs respectively.

***Comparison of Manpower Outturns
with Training Board Forecasts***

(A) *Printing Industry*

3.21 Table 3.11 compares the actual outturns (i.e. the number of employees plus vacancies) with the forecasts made by the Training Board in 2012:

Table 3.11 : Comparison of 2014 Manpower Outturn with Training Board's Forecast Made in 2012

Job Level	Actual Outturn in 2014	Training Board's Manpower Forecast in 2012	Forecast Compared with Actual Outturn
Technologist/Managerial	1 411	1 333	- 5.5%
Technician	7 391	8 481	+ 14.8%
Craftsman	7 972	8 390	+ 5.2%

3.22 The survey revealed an annual increase of 6.5% at technological/managerial level, an annual decrease of 4.2% and 9.5% at the technician and craftsman levels respectively in the printing industry. The forecasts of manpower demand made by the Training Board two years ago were close to the actual outturns at technologist/managerial and craftsman levels. The substantial deviation at technician level was mainly caused by less demand of technical staff in Branch 3 – Printing and Branch 5 – Printing Agents.

(B) *Publishing Industry*

3.23 The actual outturns (i.e. the number of employees plus vacancies) compared with the forecasts made by the Training Board in 2012 is shown in Table 3.12:

Table 3.12 : Comparison of 2014 Manpower Outturn with Training Board's Forecast Made in 2012

Job Level	Actual Outturn in 2014	Training Board's Manpower Forecast in 2012	Forecast Compared with Actual Outturn
Managerial	1 712	1 847	+ 7.9%
Supervisory	2 626	3 579	+ 36.3%
Technical Staff	6 492	5 392	- 16.9%

3.24 The forecasts made by the Training Board were much lower than the actual outturns at technical staff level and higher at managerial and supervisory levels. The substantial deviation was mainly caused by higher demand of technical staff in the new Branch 1- Publishing of Newspapers and Branch 2 – Publishing and Allied Industries. The sharp deviation at supervisory level was due to the less demand of middle management manpower in the whole industry, especially the demand of sales supervisor and customer services supervisor/officer. The deviation at managerial level between the actual outturn and the Training Board’s forecast was close.

Business Outlook

Overview

3.25 Hong Kong is one of the world’s major printing centre. However, the continuous increase of the appreciation of Renminbi, rise in wage, taxes and duties, and the up and down of interest rate, oil price and currencies making fluctuation costs of energy and materials cause a great challenge to the printing and publishing industries. The shortage of workers in the Pearl River Delta together with the effect on implementation of the Mainland’s Labour Contract Law and Processing Trade Policy form another threat and essential operating cost items to the printing industry. On the other side, the existing benefit of zero imported tariffs in the Mainland since the implementation of the seventh phase of the Mainland and Hong Kong Closer Economic Partnership Arrangement (CEPA VII) in May 2012, the reveal of China 12th Five-Year Plan in March 2013 together with the Supplement IX to CEPA signed on 29 June 2012, will continue to provide considerable opportunities for Hong Kong firms.

3.26 The Mainland recorded a record 24-year low economic growth of 7.4% in 2014 showing its slow economic pace of growth, also a reflection of the global economy. In view of its declining unemployment rate, rising consumer confidence and economy pick-up, the United States (US) Federal Reserve ended its huge bond-buying programme in end of October 2014. The growing economy in the US also causes its currency in a high level against other currencies. On the other side in Europe, the weak economic growth with high unemployment rate and just negative consumer index made the European Central Bank launch a bond-buying stimulus programme in January 2015 by pumping 600 billion euros a month into the economy until the end of September 2016. It aims to boost the sagging economy and to avoid deflation in Euro Zone. As a whole, despite the low economic growth in 2014 in the Mainland, it is expected that its economic growth will continue and the economy in Hong Kong is also forecasted to continue to grow. All the above situations will impose certain effects on the printing and publishing industries in the coming years.

3.27 The growing popularity of green concept together with compliance with safety requirements resulting the tightening of environment laws in China and other countries, forming the trade measures, have imposed great pressure on Hong Kong firms in the past years. The trade measures include the US Consumer Product Safety Improvement Act of 2008 (CPSIA) and the EU’s (European) toy safety Directive 2009/48/EC. It is expected that such pressure will continue in the coming years. On the other hand, other than the Mainland enterprises, other Asian manufacturers have continuously posed a strong competition to Hong Kong firms.

3.28 The well established and efficient local telecommunication networks are great assets of the printing and publishing industries that both industries can be benefited from the continuous development of digital printing and e-Publishing. Through satellite communications, international publishers can transmit texts, photos and high quality images in digital forms to their Hong Kong offices for the Asian editions. On the other hand, production processes are being automated or computerised that printing firms are increasingly employing workers with information technology skills to manage production processes. The Training Board remarks that printing and publishing companies will have more business related to applications of cross media, multi-media and transmedia. Thus, more skill manpower with related trade knowledge with information technology skills will be in great demand in both industries.

3.29 Customers from local and over the world will gradually demand higher quality of services with reasonable prices and companies of both industries will face the related challenges of providing flexibility and creativity services to meet such needs of their customers.

Printing Industry

3.30 In view of the above situation and opportunities, the Training Board believes that the local printing industry can cope with the challenges ahead and will be benefited. The Mainland has become an important, key and large printing market in the world and its printing industry continues to grow. The Training Board also believes that the huge printing market in the Mainland will provide considerable opportunities for Hong Kong printing firms. To face the different competitions and challenges ahead, more printing employers are expected to continue to diversify their business from manufacturing to trading and from Hong Kong to the Mainland. In addition to maintain good communications with their clients, they have to produce a wide range of printing materials to meet different types of customers. The continuous development of digital printing will require more technical manpower with skills related to information technology (IT). As a result, more skilled workers at technologist and technician levels are required to cater for the future manpower needs at these levels. The printing employers will also continue to hire more workers at the craftsman and operative levels in the Mainland.

3.31 The printing industry is one of the large manufacturing industries as well as one of the pillar industries of the Hong Kong economy. At present, many overseas customers are increasingly seeking faster turnaround and short delivery time to achieve the best of profit margins. With their unique capabilities of well equipped various types of printing machines and facilities, quick delivery, competitive pricing with high quality and coping short –notice jobs, the Training Board believes that local printing firms can continue to obtain more orders from their overseas customers. On the other hand, more local printing firms provide “total-solution” service to their customers, i.e. from initial concept, design, production to delivery of product, and this will further enhance their competitive ability and to catch more market share.

3.32 Digital printing, although is still in a groping stage, it is expected to continue to grow and its application areas will increase significantly in the coming years. However, web-print and print on demand will become trends for customers from all over the world sending their orders in a single copy or large quantity directly or through middleware providers to the printing firms offering such digital printing solutions and services to its world-wide customers. This is a huge market and printing firms in Hong Kong, in addition to their

convention printing facilities, should equip themselves to face such business opportunities and challenges ahead. On the other hand, offset printing is quite stable as it is still in demand.

3.33 The growing popularity of e-Publishing will continue to be a threat to the printing industry. Many publications in the past in printed form have been converted into electronics edition for easy reference and will demand a small quantity order at a time and tend to repeat orders when needed. As a whole, they have the flexibility to face market needs and aim to achieve the green concept. The e-Edition of prospectuses and textbooks becomes more and more popular are good examples. To face such great challenge ahead, the Hong Kong printers will have to streamline and diversify their business to make company more effective and efficient than before. To adopt global printing standardizations in workflow will be an essential tool to tackle worldwide customers' requirements. In addition, they will need to develop more value-added and cost effective products/services to increase their competitive ability.

3.34 With the continuous of demanding decent and attractive covers and packages, packaging printing is expected to continue to grow, especially the request of intelligent packaging, and becomes the main trade aspect supporting the traditional printing. On the other hand, despite the rapid growth of digital printing, offset printing is still in great demand. With the latest development and business trend in both printing skills, it seems that offset printing and digital printing still complement rather compete with each other in the near future.

Publishing Industry

3.35 As an international city and close to the Mainland, Hong Kong is a regional publishing centre. With the benefits of free trade policy, a high degree of freedom for the press as well as well established and efficient telecommunication networks, many international publishers and news agencies have set up offices in Hong Kong.

3.36 With its expected bright future and low business entry level, e-Publishing will be the trend and fast growing area in the publishing industry in the coming years. In recent Hong Kong Book Fairs, there was either an "e-Book Corner" or a theme zone on e-Publishing with exhibitors and their e-book vending machines to promote e-Publishing products and services to readers. A substantial number of publishing firms have been established to catch the business opportunities, such as in the areas of general e-books, e-learning, e-textbooks and e-comics. However, e-Publishing is still in a groping stage as there is not yet a fixed business model available for the industry. The Training Board encourages local publishers to get co-operation with telecommunication operators so that existing and new contents converting into an appropriate e-Publishing format can be mounted onto a designated website or an application store for sale via the Internet. In addition, an appropriate business model for the e-Publishing market is required. In view of the above situations and people in general keep the habit of reading printed publications, the Training Board estimates that the industry will continue to grow steady in the coming years.

3.37 Following the successful launch of the "Pilot Scheme on e-Learning in Schools" in 2012, the Education Bureau of the Hong Kong Government launched "E-Textbook Market Development Scheme (EMADS)" in June 2014. It aims to facilitate and encourage the participation of potential and aspiring e-Textbook developers for the development of a new,

healthy, rich and sustainable e-Textbook market in Hong Kong. The EMADS also targets at trying out a quality vetting and assurance mechanism for e-textbooks with a view to developing a full-fledged recommended textbook list for e-textbooks. The phase one of the EMADS was available in the 2014/15 school year, while phase two in the 2016/17 school year. Also, a three-year Research Study on the Pilot Scheme on e-Learning in Schools was started in September 2011 with the aim to improve the effectiveness, implementation and other aspects of e-Learning in Hong Kong with international experiences. The Scheme will provide considerable opportunities for the local publishing companies.

3.38 The publication of school text book is still the major and key market for the publishing industry in Hong Kong. The publication of children's book, pop-up books and other books and magazines with special feature, like augmented reality, will be other important business sectors to attract more readers.

Future Technological Developments

(A) Printing Industry

3.39 In view of unique features and merits of personalisation, variable data printing, on-demand printing, electro-photography, inkjet, nanography, inline finishing and fast delivery time, the digital printing will further extend the business scope of the printing industry. In addition, digital printing has already penetrated in our daily life that family book, personal history book and photo album for memorial events (like wedding, birthday party, birth of a new born baby and graduation) can be printed in small quantity and a fast way. With the latest technological development, digital printing allows printing nearly on various materials, excluding water and air. Although digital printing is still in a groping stage, it will certainly become a fast growing and high-profit business for the industry.

3.40 In recent years, printing standardization has developed rapidly to become an industry trend. With its advantages of providing uniform, defined procedures and tools helping printing firms to produce quality products in a faster, more efficiently, safe and more cost-effectively manner, printing standardization becomes more important and an essential certificate of quality assurance for printing firms in the printing industry. On the other hand, printing firms face the increasing pressure from publishers and print buyers worldwide to adopt various printing standardizations in different countries, such as ISO (ISO TC130 Graphic Technology), US IDEAlliance G7, Switzerland Ugra PSO and Germany Fogra PSO. Recently, quite revised or new standards have been released, which include ISO 12647 on printing quality control, ISO 16759 for carbon footprints.

3.41 Green printing is a growing trend and importance and becomes a key technological development in the printing industry. The minimizing chemical use, less release of waste and minimum emission of carbon dioxide in the platemaking and printing processes becomes important targets for the printing industry. As publishers and other users pledge to be more environmentally friendly and to meet green print standard, printing firms are required to use recycled paper, synthetic paper, UV (Ultraviolet) ink and the bean and vegetable-based ink, low volatile organic compounds (VOC) and chemical-free plate. The above would help workers work in a clean and health environment.

3.42 At present, the printing industry puts more effort on innovative technologies and related applications for more business markets. The innovative technologies include 3D printing, holography, application of RFID in package, printed electronics, from print-media to cross media and transmedia, augmented reality and functional printing. In addition, the use of hot and cold foiling, gold and silver printing, metallic inks and varnishes, special coating, special paper and materials, valued-added printing will become more popular. Also, large format printing with flat-bed size and reel-fed size together with the advantages of faster speed, better quality and flexible materials will be another key business in the industry. All these will provide the printing industry a better picture of latest technology and inspire printing companies to employ new business applications, solutions and models.

(B) *Publishing Industry*

3.43 With enormous effect of the Internet and development of digital techniques together with smartphones, tablet computers and other mobile communication devices, the publication process has been radically changed in recent years. More and more new applications and solutions are developing, which in turn provide lots of business opportunities for the industry. The reading habit of readers, especially the youngsters, gradually changes to accept electronic publications, including e-Books. At present, more and young generation shows great learning enthusiasm in digital books, comics, manga and sequential art. The digital contents become more valuable and can be applied in multi-media. They are also valuable to authors and publishers. As a whole, the online learning will be well accepted by learners. The business of e-publishing grew fast in the past few years and is expected to continue to grow in the coming years.

3.44 At present, there is still no common standard yet for e-Publishing as many different standards/formats are being used in different e-Readers for e-Publishing, i.e. Open Web Platform, EPUB3 and HTML5. On the other hand, new and existing contents which can be converted into different standards/formats to suite various e-Readers and applications, will become great assesses to authors and publishers. Innovation is always essential in publishing, especially, e-Publishing, to keep audiences, to expand new markets and to attract new audiences. On-line or web fiction/literature become a trend and gradually welcome by readers as authors and readers can interact with each other via the Internet. Some on-line fictions are so accepted by readers to make a substantial profit and have their printed version for sale. The copyrights of some renowned fictions and literatures are obtained for making movies. However, the increasing online copyright infringement is still a thread to authors and publishers in digital economy. The effort put on the issues of copyright, law and rights, like Digital Content Management (DCM) and Digital Rights Management (DRM) will be substantially increased and be well addressed in terms of the role and benefit between the author, publisher, service provider and agent.

3.45 The Web becomes the universal platform together for sharing and transmitting of digital contents and application experiences. With introduction of open source technologies, it provide new abilities and facilities for authors, publishers and retailers to a more directly and independently involvement in the e-Publishing business. The rapid development of cloud computing will further enhances the future development of e-Publishing, which includes multi-media interactive features, different languages, format compatibility and audio-visual function. This will lead to the development of all-media publishing that digital contents can be stored and be restored in all forms of media, such as text, graphics, photos, sounds, video

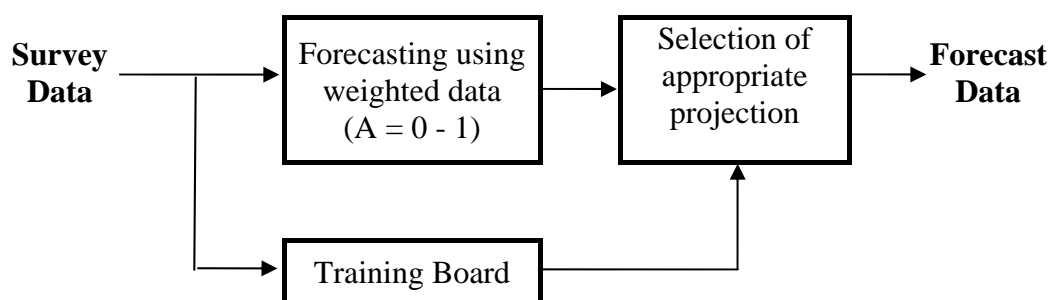
and movie (including 3 Dimension). The contents are then transmitted through the Internet and other wireless communication networks.

Forecast of Future Manpower

3.46 Based on the manpower trend, business outlook of the printing and publishing industries and employers' forecast of future manpower requirement, it seems that the printing industry will be in a steady situation while the publishing industry will have mild growth in the years ahead. Also, with the continuous growing of digital printing and e-Publishing, there will be an on-going demand for well-trained technologists, technicians and craftsmen to maintain the developments of the printing and publishing industries.

3.47 Taking the above into consideration as well as employers' forecast on manpower requirement in 2015 collected from the survey, the Training Board has estimated, by using the Adaptive Filtering Method (AFM) for the manpower projection, the additional manpower required by the printing and publishing industries for 2015 - 2017.

3.48 The Training Board has considered the use of the Labour Market Analysis (LMA) approach for determining the manpower trend of the printing industry. Due to the complexities involved, the LMA model is found to be inapplicable to this survey. The Training Board therefore adopts the AFM which was used in the previous manpower surveys. The Training Board selects the most appropriate projections, taking into consideration the external factors, economical trends, technological development, the workforce pattern and the future outlook of the industry as mentioned in the above paragraphs. The method is briefly illustrated in the following diagram:



(A) *Printing Industry*

3.49 When comparing with the overall manpower of the printing industry in May 2012, a mild annual decrease of manpower of 1.9% was collected in May 2014. Having examined the past and present survey data, including the employers' manpower forecast by May 2015, and considered the business outlook as well as the future developments of the printing industry, the Training Board considers that the manpower demand for technologist level will be continuous in the coming few years. As it recorded two and three consecutive annual decrease at technician and craftsman levels respectively in the previous surveys, the training for wastage (3%) for the two job levels will meet the future manpower requirement of the industry in the next few years. The Training Board also observes that more manpower with trade knowledge and related skills would be required in the growing digital printing area.

3.50 From the above estimates, the additional manpower required by the printing industry at the technologist, technician and the craftsman levels in the next three years (2015 – 2017) are as follows:

Table 3.13 : Annual Manpower Demand in the Printing Industry for 2015/17

Job Level	Annual Average Additional Demand for Employees			
	Forecast Growth (A)	Wastage (B)	Total (A) + (B)	(±10% Range)
Technologist/Managerial	40	44	84	75 - 93
Technician	-	222	222	200 - 244
Craftsman	-	240	240	216 - 264

A breakdown of the above figures into various principal jobs is given in Appendix 17.

(B) Publishing Industry

3.51 The AFM is also adopted for manpower projections in the publishing industry. The Training Board notices that an annual increase of 3.7% in the overall manpower of the industry in May 2014 when compared with that in May 2012. Although this is the fifth consecutive annual increase in overall manpower over the past 10 years, a sharp annual decrease of 12.8% at supervisor level was collected in 2014. On the other side, an annual increase of 2.3% and 14.1% at managerial and technical staff levels respectively was recorded. In view of the employers' manpower forecast by May 2015 together with the business outlook and future developments of the publishing industry, the Training Board considers that the industry will grow steadily in the coming years. With reference to the continuous growing of electronic publishing, the Training Board remarks that there will be an increase in workforce, at the managerial and technical staff levels. As in the previous surveys, the Training Board adopts a wastage rate of 3% for manpower at the managerial, supervisory and technical staff levels in the next three years. In view of its sharp annual decrease in manpower, the Training Board considers the training for wastage at supervisory level will be enough in the coming years.

3.52 From the above estimates, the annual additional manpower demand required by the publishing industry in the next three years (2015 – 2017) are as follows:

Table 3.14 : Annual Manpower Demand in the Publishing Industry for 2015/17

Job Level	Annual Average Additional Demand for Employees			
	Forecast Growth (A)	Wastage (B)	Total (A) + (B)	(±10% Range)
Managerial	11	52	63	56 – 69
Supervisory	-	79	79	71 – 87
Technical Staff	30	193	223	201 – 245

A breakdown of the above figures into various principal jobs is given in Appendix 18.

Manpower Demand and Supply Analysis

3.53 The printing industry has a projected annual demand for 75 - 93 technologists for 2015 - 2017. Together with the demand for some 3 - 4 production directors/managers in the publishing industry in the same period of time as mentioned in Appendix 18, the total annual demand of the industry for technologists/managers will 78 - 97 for 2015 – 2017.

3.54 Currently manpower supply at technologist level is very scarce because local tertiary institutions do not offer printing degree programmes. Youngsters interested in pursuing higher level printing courses need to enroll overseas. Owing to the limited supply of technologists, the majority of employers recruits their technologists through the promotion of competent technician level workers or directly recruits higher diploma students of Hong Kong Design Institute (HKDI) or university graduates.

3.55 Meanwhile, the Department of Communication Design and Digital Media of HKDI is the only local institute supplying manpower at higher diploma level in the printing discipline. The planned output of graduates for 2015 – 2017 is as follows:

<u>Course</u>	<u>Estimated No. of Graduates</u>		
	<u>2014/15</u>	<u>2015/16</u>	<u>2016/17</u>
<u>Full-time</u>			
Higher Diploma in Printing and Publishing (3-Year)	5	0	-
Higher Diploma in Printing and Publishing (2-Year)	60	0	7
Higher Diploma in Publication Design and Print Media (2-Year)	0	93	90
Total:	65	93	97

3.56 The output from HKDI will be less than the projected demand for the printing industry in the coming 3 years. However, it should be noted that some of the other higher diploma graduates may join technician level jobs in the industry.

3.57 The forecast demand for technicians in the printing industry, training for wastage, is 200 – 244 annually in the next three years. Together with a demand for some 4 – 5 production supervisors in the publishing industry for 2015-2017 as mentioned in Appendix 18, the total annual demand of the industry for technicians will be 204 – 249 for 2015 – 2017.

3.58 Based on the information provided by the Pro-Act Training and Development Centre (Printing), the only local institute providing full-time technician courses on printing, the supply of technician graduates will be:

<u>Course</u>	<u>Estimated No. of Graduates</u>		
	<u>2014/15</u>	<u>2015/16</u>	<u>2016/17</u>
Diploma in Vocational Education (DVE) Programme (Advertising, Packaging and Printing) – Technician Foundation Certificate (TFC) Award	1	0	0
DVE Programme (Advertising, Packaging and Printing) – DVE Award	78	70	91
DVE Programme (Graphic Communications) – DVE Award	64	66	57
Total:	143	136	148

3.59 The total output from the Pro-Act Training and Development Centre (Printing) cannot meet the projected demands for 2015 – 2017. However, some of the technician jobs may be filled by the training of secondary school leavers through apprenticeship and internal promotion of experienced craftsmen. The view of the Training Board is that upgrading training through short courses (like those of New Skills Upgrading Scheme) on trade knowledge and skills as well as supervisory management are necessary for such personnel. Due to the technological advancement in printing processes, the Training Board considers that properly trained technician graduates from vocational institutes are better equipped to take on technician jobs.

3.60 For the craftsman level, although there will not be any projected growth in the coming three years; a constant supply of personnel is required to sustain the local printing business. The forecasted demand for craftsmen will be 216 – 264 annually for 2015 – 2017 in the printing industry. Together with the demand of total 9 – 11 printing craftsmen (production assistant) for they coming three years as stated in the publishing industry in Appendix 18, the total annual demand of the industry for craftsmen will be 225 – 275 for 2015 – 2017.

3.61 Based on the training capacity of the Pro-Act Training and Development Centre (Printing), the supply of craft graduates will be:

<u>Course</u>	<u>Estimated No. of Graduates</u>		
	<u>2014/15</u>	<u>2015/16</u>	<u>2016/17</u>
DVE Programme (Advertising, Packaging and Printing) – Basic Craft Certificate (BCC) Award	31	25	13
DVE Programme (Graphic Communications) –Basic Craft Certificate (BCC) Award	49	35	12
DVE Programme – Certificate of Craft Studies (Print Media)	0	0	0
Total:	80	60	25

3.62 The total output from the Pro-Act Training and Development Centre (Printing) is much lower than the projected demand for the craftsman jobs. However, the shortage can be alleviated through retraining of workers in the traditional trades through skills upgrading courses.

3.63 The Training Board will conduct another manpower survey in 2016 to review and update the manpower requirements of the industry, and will monitor the progress of the latest technological developments for organizing training for in-service workers.

SECTION IV

RECOMMENDATIONS

4.1 Hong Kong is still one of the major printing and publication centre in the world despite its printing and publishing industries had gone through another difficult time since the last survey in May 2012. The continuous increase of the appreciation of Renminbi, rise in wage, taxes and duties together with up and down of oil price, interest rate and currencies causing fluctuation of costs of energy and materials, which have imposed a great challenge to the two industries. The shortage of workers in the Pearl River Delta and the effect on implementation of the Mainland's Labour Contract Law as well as Processing Trade Policy form another threat and essential operating cost items. In the meantime, other than the Mainland enterprises, various Asian manufacturers have continuously posed a strong competition to Hong Kong printing firms. On the other side, the existing benefit of zero imported tariffs in the Mainland since the implementation of the seventh phase of the Mainland and Hong Kong Closer Economic Partnership Arrangement (CEPA VII) in May 2012, the reveal of China 12th Five-Year Plan in March 2013 and the Supplement IX to CEPA signed on 29 June 2012, will continue to provide considerable opportunities for Hong Kong firms and the two industries. In addition, the excellent local telecommunication networks are great assets of the printing and publishing industries that both industries can be benefitted from the continuous development of digital printing and e-Publishing.

4.2 The world is facing a volatile economic situation. The United States Federal Reserve ended its huge bond-buying programme in end of October 2014 as a response to its growing economy and improved employment rate. In Europe, the weak economic growth with high unemployment rate and just negative consumer index made the European Central Bank launch a bond-buying stimulus programme in January 2015. With the aims to boost the sagging economy and to avoid deflation in Euro Zone, the European Central Bank would pump 600 billion euros a month into the economy until the end of September 2016. All the above situations will impose certain effects on the printing and publishing industries in the coming years. However, the reform and continuous development in the Mainland will bring more business opportunities to the world as well as the industries in Hong Kong. In view of the above, the Training Board has a cautious optimistic view that the printing industry will be in a steady situation while the publishing industry will have mild growth in the coming years. The Training Board also recommends the following measures for employers to consider coping with present situation and challenges ahead:

- (i) To keep a close check of the latest development of technologies related to the printing and publishing industries, especially digital printing and electronic publishing;
- (ii) To adopt standardisations in processing/service and to streamline and diversify business to make company more flexible, effective and efficient than before;
- (iii) To develop more creative, value-added, cost effective, high quality and green products / services, especially in transmedia area, to

increase competitive ability;

- (iv) To further strengthen the overall skill level and competency of the staff, especially the information technology skills, design and creativity skills, through appropriate training leading to become a much stronger and competitive organisation;
- (v) To carry on to explore new business in niche product markets and the most cost effective way so as to strengthen market share; and
- (vi) To continue to maintain and to deepen strong partnership with key customers and to establish new partnership with potential customers.

4.3 Regarding the strength of skill and competency of staff, the Training Board suggests that on top of the individual company's training needs, the "Employees' Training Needs" at Appendix 15 for the printing industry while Appendix 16 for the publishing industry will be a useful reference on various aspects of training for employers. In this particular situation, employers are recommended to step up their training efforts in order to ensure supply of well equipped skill manpower to meet the challenges and business opportunities ahead. The Training Board also recommends the Vocational Training Council (VTC) and other training organizations to keep a close view on the above training needs of the printing and publishing industries and to provide such needs in time.

4.4 The Training Board considers that the practice of conducting manpower survey at a 2-year interval is useful in building up a series of historical data for comparison and for projecting future manpower requirements. Such a practice should continue so that the manpower and training situation of the printing and publishing employees will be closely monitored. Based on the information, the Training Board can recommend measures to meet the training needs.

Annual Intake of Trainees

4.5 At the time of the survey, there were 32 and 63 trainees in the printing industry and the publishing industry respectively. Since it normally takes up to three years to train a trainee, it is evident that the present training efforts are insufficient to satisfy the industry's needs.

4.6 To ensure an adequate supply of skilled manpower, the Training Board urges employers to embark on an annual manpower training programme of a scale set out below:

Table 4.1 : Recommended Number of Trainees to be Taken on Annually from 2015 to 2017

<i>Job Level</i>	Additional Manpower Required Annually	
	Printing Industry	Publishing Industry
Technologist/Managerial	84 (6.0%)	63 (3.7%)
Technician/Supervisory	222 (3.0%)	79 (3.1%)
Craftsman/Technical Staff	240 (3.0%)	223 (3.5%)

(Note: the numbers in brackets denote the percentages of the annual training requirements of manpower at the respective job levels).

A breakdown of the above figures into various principal jobs is given in Appendices 17 and 18 for printing industry and publishing industry respectively.

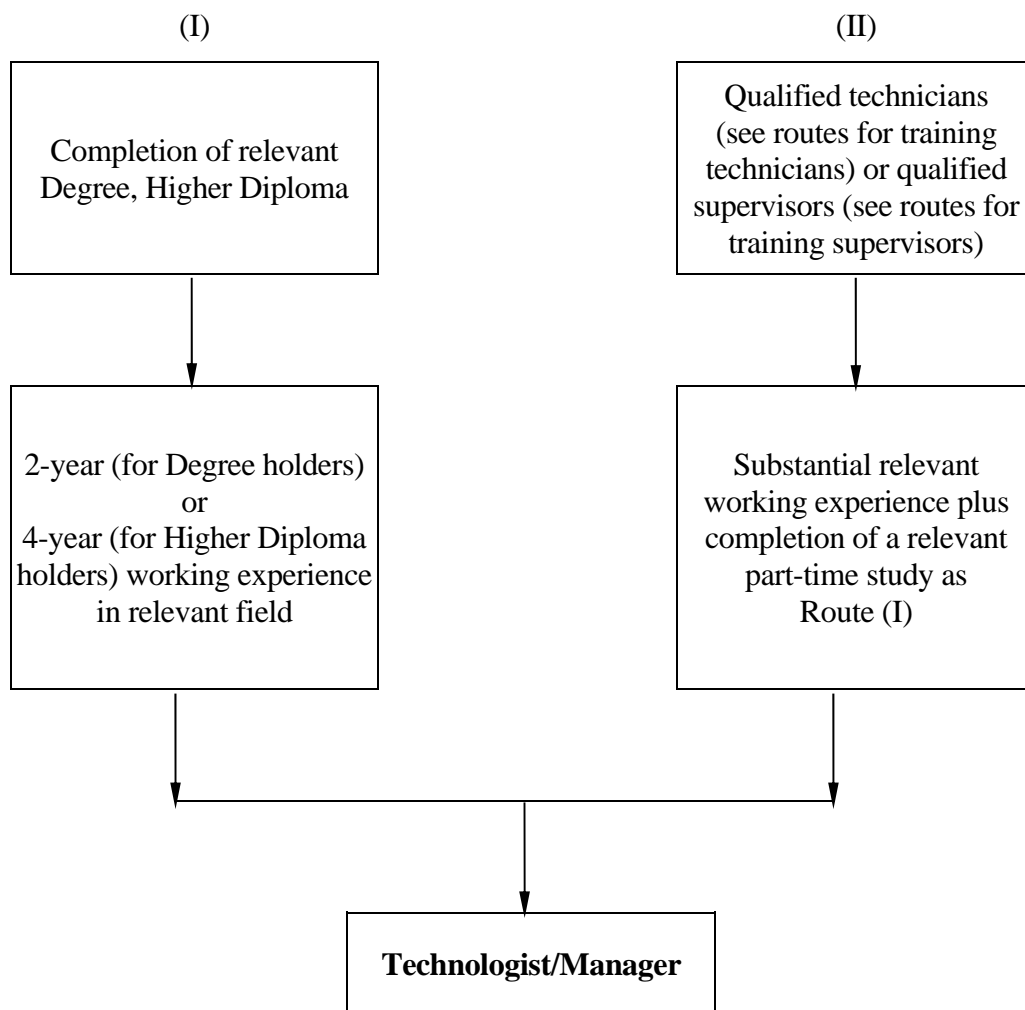
4.7 For manpower planning at the company level, employers are requested to note that the volume of training as indicated in para. 4.6 above, when expressed in terms of existing manpower, represents annual training requirements of 6.0% of the total numbers of technologists/managers and 3.0% (the wastage rate) of the those of technicians and craftsmen respectively in the printing industry for 2015 – 2017. For the same measure, there are about 3.7%, 3.0 % and 3.5% respectively of total numbers of managers, supervisors and technical staff in the publishing industry for 2015 – 2017.

4.8 The recommended training routes for technologists and managers, technicians and supervisors, as well as craftsmen are outlined in the following paragraphs.

Training of Technologists and Managers

4.9 Technologists in the printing industry or managers in the publishing industry should preferably possess either a relevant university degree or higher diploma or higher certificate plus a few years relevant working experience in the printing or publishing field.

4.10 The following diagram shows the usual training routes of a technologist/manager:



4.11 Employers are recommended to recruit either degree or higher diploma holders as technologist/managerial trainees, i.e. route (I). For qualified technicians/supervisors with exceptional abilities, route (II) provides them with advancement opportunities.

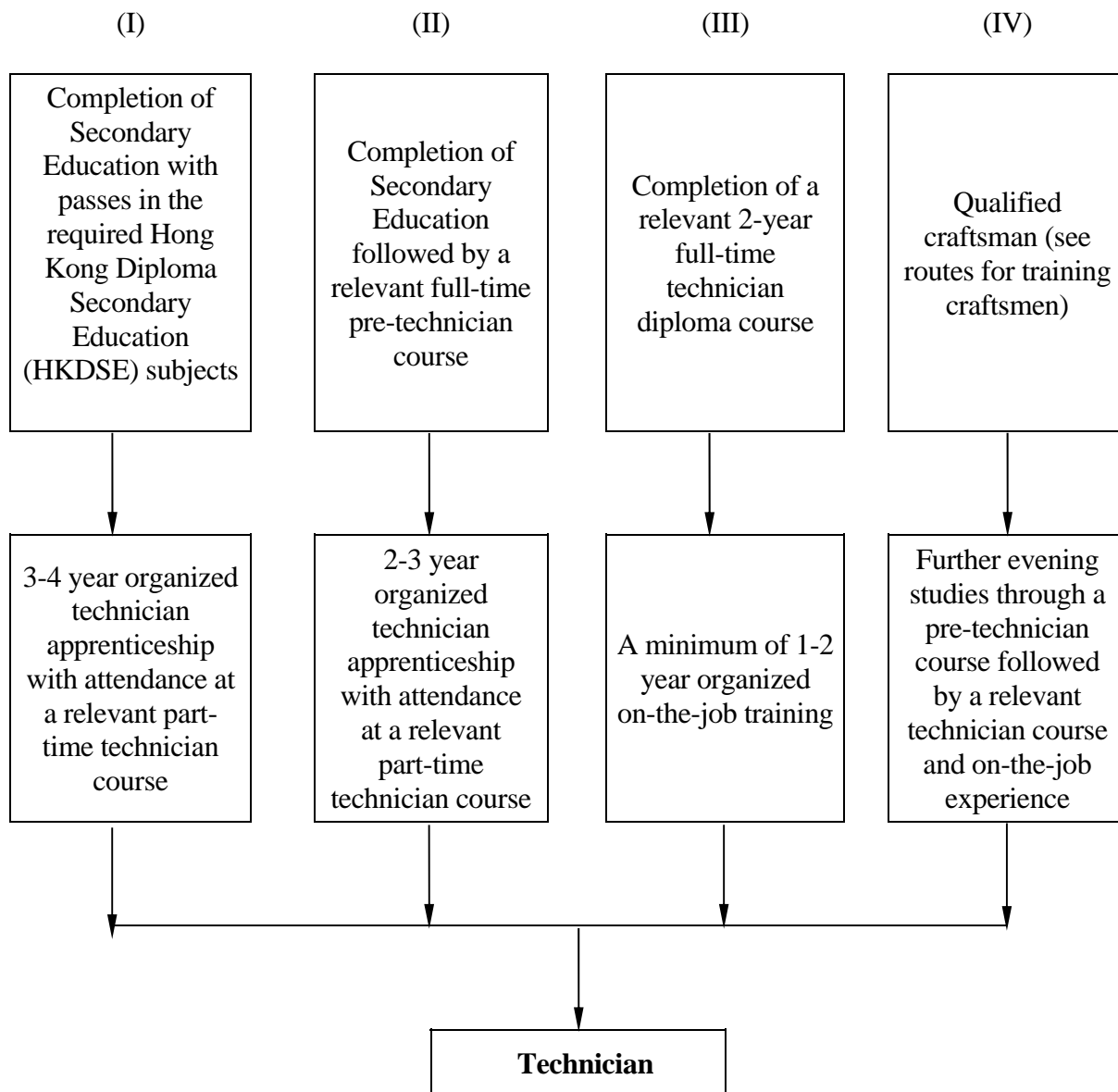
4.12 Employers are recommended to sponsor their technicians/supervisors to attend the part-time evening degree, higher diploma or higher certificate courses to upgrade their knowledge and skills.

Training of Technicians and Supervisors

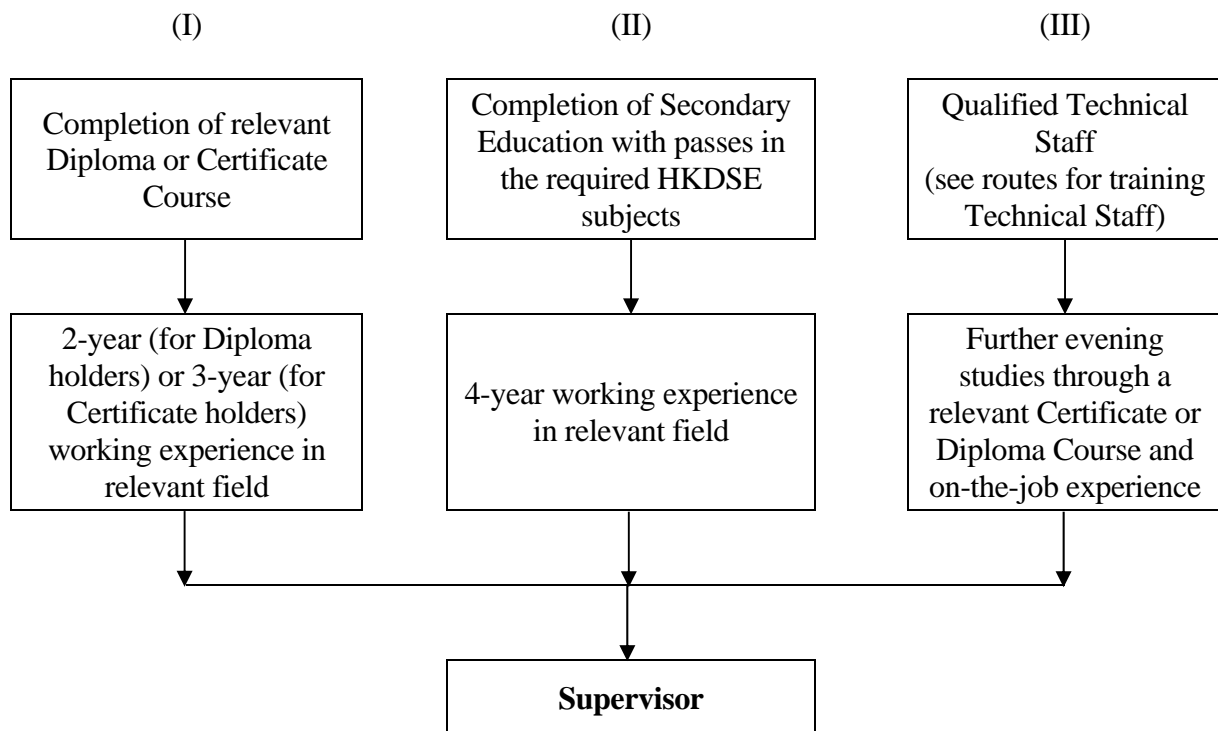
4.13 A technician or supervisor should be able to apply proven techniques and procedures to carry out technical responsibilities, including the supervision of craftsmen or technical staff under his/her control. The training of a technician or supervisor should comprise on-the-job practical training to gain experience and attendance of a relevant technician certificate course to acquire the theoretical knowledge of the trade.

4.14 The recommended routes for training technicians in the printing industry and supervisors in the publishing industry are shown below:

(A) Printing Industry - Technicians



(B) *Publishing Industry - Supervisors*



4.15 Hong Kong Design Institute (HKDI) of the VTC offers full-time Higher Diploma courses, part-time Higher Diploma courses and other upgrading courses in the printing discipline; while the Pro-Act Training and Development Centre (Printing) offers an one to three years full-time Diploma in Vocational Education Programme to prepare youngsters for employment at craft or technician level or further study.

4.16 Many employers recruit secondary school leavers as technician or supervisory trainees. The trainees learn their skills in workplace by working closely with experienced technicians or supervisors and at the same time pursue relevant part-time evening courses at the tertiary educational institutions. Some employers recruit graduates of relevant Diploma or Certificate courses from the educational institutions. However some employers in the printing industry prefer to recruit the graduates of the Pro-Act Training and Development Centre (Printing) as craft or technician apprentices. The period of apprenticeship is normally three years, while graduates of the full-time basic craft or technician foundation course are exempted from the first year of the apprenticeship.

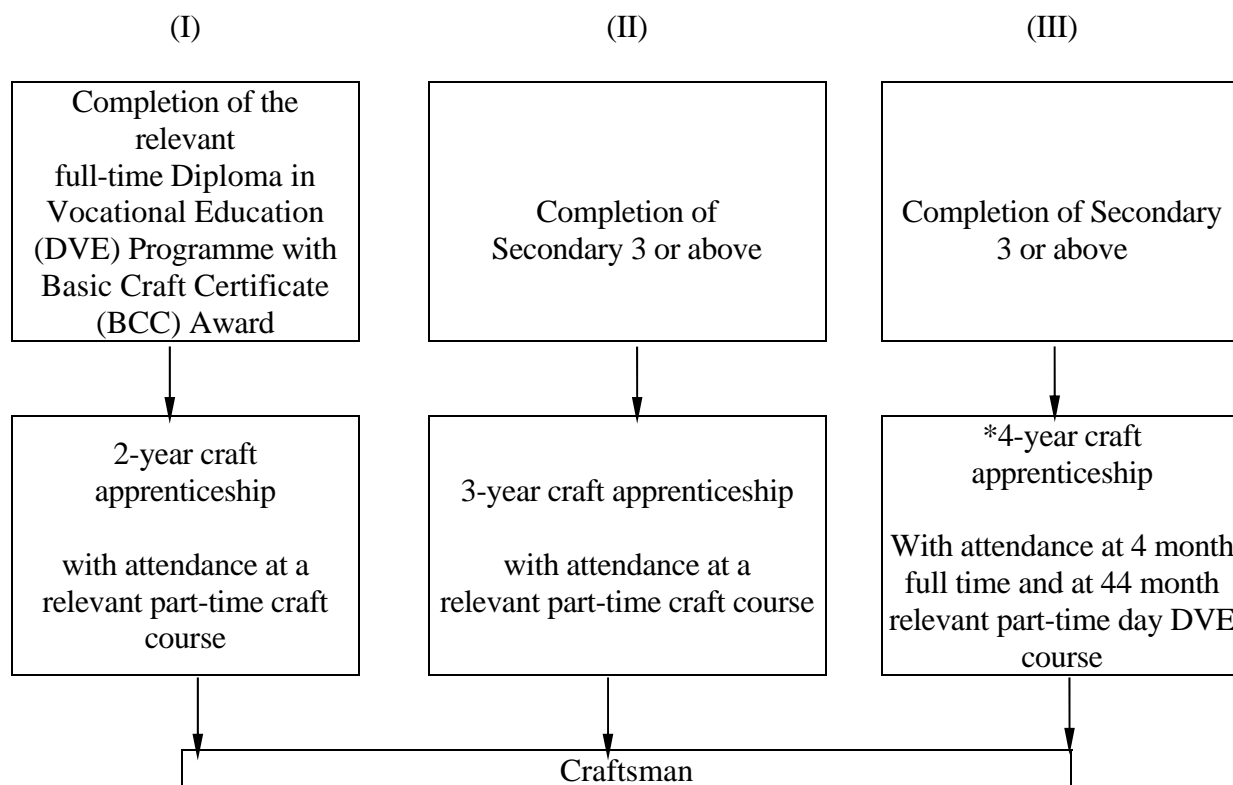
4.17 The Training Board strongly recommends employers both in the printing and publishing industries to recruit the graduates of the Pro-Act Training and Development Centre (Printing) and HKDI and to sponsor them to attend part-time courses for the purpose of either upgrading or updating their skills and knowledge.

Training of Craftsmen and Technical Staff

4.18 A craftsman or technical Staff is a skilled employee capable of applying skills to a wide range of jobs within the trade. He/She should require not only practical skills but also related theoretical knowledge so that he/she can adapt to technological advancement.

4.19 The recommended routes of training are:

(A) *Printing Industry - Craftsmen*



* To cope with the *Earn and Learn Scheme* for the printing industry launched in 2014, trainees are arranged to take 4-year craft apprenticeship and study the DVE (Print Media) at part-time day mode.

Remark:

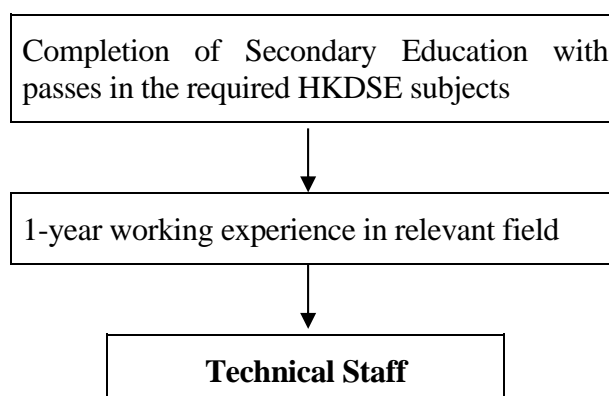
VTC's **Earn and Learn Schemes** integrate structured vocational education and on-the-job training with clear progression pathways to attract talent for industries and trades with a keen demand for labour.

The Government and participating industries will provide the participants with an allowance and a guaranteed salary, such that the young people can earn a steady income while equipping themselves with knowledge and skills to pursue a promising career.

The modes of training will be specially designed to cater for the needs and operation of specific trades and industries. Participants will study training programmes of VTC and receive on-the-job training at employing companies. Graduates of the schemes can also pursue further studies to acquire higher academic qualifications for career development.

(B) ***Publishing Industry - Technical Staff***

(A) ***Publishing Industry – Technical Staff***



4.20 The Basic Craft Certificate (BCC) courses offered by the Pro-Act Training and Development Centre (Printing) of the VTC were re-vamped and subsumed in the Diploma in Vocational Education (Print Media) programme. Students would get the BCC award when they earned 168 credits from the BCC curriculum of DVE (Print Media) programme of which covered 930 training hours on trade modules and 210 hours on generic modules.

4.21 In 2014, Certificate of Craft Studies (CC) award was introduced to the DVE (Print Media) programme. Students would get the CC award when they earned 160 credits from the CC curriculum of which covered 690 hours on trade modules and 240 hours on generic modules.

Basic Craft Courses in Printing Discipline

4.22 The Pro-Act Training and Development Centre (Printing) offers full-time courses under the Diploma in Vocational Education Programme. Students may choose the BCC award which enable youngsters who are vocationally oriented to join industry upon completion of the course. It comprises practical training, trade knowledge as well as generic education.

4.23 On completion of the BCC courses, the graduates are expected to join industry as second year craft apprentices for a further two-years training. The Training Board urges employers to recruit the graduates as apprentices not only because their training period is shorter but also because they are equipped with basic skills ready for productive work right from the start of their employment.

4.24 The BCC awarded course being offered by the Pro-Act Training and Development Centre (Printing) is listed in paragraph 4.32.

Certificate of Craft Studies Course in Printing Discipline

4.25 In order to cope with the development of the printing industry, the Pro-Act Training and Development Centre (Printing) offers the CC at part-time day mode to support the 4+44 mode of Earn and Learn Scheme for the printing industry in AY 2014/15. Students of S3 intake may opt this scheme under the Program which enables them to join the printing industry upon completion of the first 4 month full time practical training. During the 4 months, students will mainly learn trade knowledge and carry out workshop training to equip them with basic skills for working in the printing industry. Then they work as craft apprentice to receive on-the-job training and complete the rest of the CC and DVE curriculum at part-time day mode in the further 44 months.

4.26 The CC awarded course being offered by the Pro-Act Training and Development Centre (Printing) is listed in paragraph 4.32.

New Skills Upgrading Scheme

4.27 The New Skills Upgrading Scheme (SUS) is operated by the Government to upgrade those low education and low/traditional skilled level workers with the aim of enhancing their employability. Eligible trainees can apply for course fee waive or fee subsidies. Suitable providers of printing courses may bid to mount SUS courses. Since the commencement of the SUS courses in September 2001, over 11 600 trainees had attended SUS courses in printing trades. The skills upgrading courses currently offered to tradesmen are listed in Appendix 19.

4.28 Employers are urged to make full use of the part-time skills upgrading courses for upgrading their employees.

Trade Testing for Printing Workers

4.29 The Vocational Training Council has approved a trade testing and certification system to be implemented by its training boards. The system is operated on a voluntary basis and its objectives are to:

- (a) help industry in the selection of workers for skilled jobs,
- (b) facilitate the acquisition of recognized qualifications, in particular, for those who have not gone through a formal training,
- (c) enhance the status of skilled workers,
- (d) set the specifications related to standards for skilled workers, and
- (e) facilitate the establishment of a skill hierarchy for career advancement of skilled workers.

4.30 The Printing and Publishing Training Board is responsible for implementing the trade test for printing workers. Currently, the Training Board organizes trade test for offset printing machine craftsmen. In view of the latest development of the printing industry, the Training Board are in the process developing vocational assessments on digital printing.

4.31 Employers are urged to encourage their employees to take the test so that their tradesman status can be formally recognized.

Pro-Act Training and Development Centre (Printing)

4.32 The Training Board has been charged with the responsibility of advising on the operation of the Pro-Act Training and Development Centre (Printing). The full-time courses currently offered by the Pro-Act Training and Development Centre (Printing) include:

	<u>Duration</u>
(a) Diploma in Vocational Education Programme, Print Media (BCC Award)	Min. 1 year
(b) Diploma in Vocational Education Program, Print Media (CC Award)	2 - 3 years
(c) Diploma in Vocational Education Programme, Print Media (TFC Award)	1 - 2 years
(d) Diploma in Vocational Education Programme, Print Media (DVE Award)	1 - 3 years
(e) Practical training for students of HKDI & various IVEs in Design and Business Administration Disciplines	3 - 180 hours

Note : BCC : Basic Craft Certificate

CC : Certificate of Craft Studies

TFC : Technician Foundation Certificate

DVE : Diploma in Vocational Education

Department of Communication Design and Digital Media

4.33 Employers are urged to give full support to the Department of Communication Design and Digital Media of HKDI by recruiting its full-time graduates. A list of relevant courses offered by HKDI is at Appendix 20.

Advanced Printing Technology Centre (APTEC)

4.34 In September 1999, the Hong Kong Printers Association and the Hong Kong Institute of Vocational Education (Kwun Tong), Vocational Training Council, jointly organized a project to assist the local printing and publishing companies in migrating to the latest digital production workflow. Based on a funding from the Innovation and Technology Fund (ITF) for a project period of 3 years, the Advanced Printing Technology Centre (APTEC) was established at IVE (Kwun Tong) on 3 May, 2000 and moved to Hong Kong Design Institute in 2012.

4.35 APTEC has an important role in acting as a technology transfer centre for the dissemination of latest technology to the local printing and publishing companies. With the strong support from major international equipment suppliers, APTEC has set up a state-of-art and multi-supplier digital printing production environment to simulate industrial environment. By providing technology transfer seminars, professional training programs, research on new technologies, and consultancy services, APTEC aims to facilitate the migration of these companies from traditional workflow to digital workflow.

4.36 The successful completion of the project on 31 January, 2003 has turned APTEC into a new page. APTEC has committed to continue its services to the industries by operating in a self-financing mode, and is incorporated as a subsidiary of the Hong Kong Printers Association. An agreement was also signed between the Hong Kong Printers Association and the Vocational Training Council for establishing a new form of partnership.

4.37 In recent years, APTEC strives to promote international printing standardization and colour management to the industries, by participating ISO / TC130, National Technical Committee 170 on Printing of Standardization Administration of China, IDEAlliance of US, Rochester Institute of Technology (RIT) of US and Fogra from Germany. In 2011, 2013 and 2014, three large-scale international technical conferences together with a series of workshops, which were funded by SME Development Fund, were organized, in order to deliver the latest technology trends to the industries.

Training Manuals

4.38 The Training Board has published manuals of training programmes and specifications for the major principal jobs in the printing industry. The Training Board recommends these manuals to employers who wish to devise training programmes for their trainees or assess the skill level of their workers.

Training Services of the Vocational Training Council

4.39 The Vocational Training Council offers free services to help employers organize training schemes including:

- (a) The statutory **Apprenticeship Scheme**, through which technicians and craftsmen are effectively trained to meet the needs of the industry;
- (b) The **Earn and Learn Schemes**, which offer structured vocational education and on-the-job training with clear progression pathways to attract talent for industries and trades with a keen demand for labour;
- (c) The **Engineering Graduate Training Scheme**, which helps engineering students and graduates complete their professional training as engineers;
- (d) The voluntary **Trade Testing and Certification Scheme**, which ascertains the standards of skilled workers; and
- (e) The **New Technology Training Scheme**, which provides financial assistance to local companies that wish to have their employees trained overseas or locally in new technologies. The maximum grant is 50% of the training cost.

Employers in Hong Kong interested in the above training schemes are welcome to contact the Council.

The Need for More Education and Training Facilities

4.40 Since Hong Kong has established itself as a principal service centre in the region, it is necessary to ensure that Hong Kong is in a position to provide world-class printing and publishing services. The Training Board recommends that tertiary educational institutions should consider offering more printing and publishing courses at degree, higher diploma and diploma levels to meet the projected demand for manpower. In addition, employers should provide more on-the-job training to their employees and release them for off-the-job upgrading training.

Out-centre Courses/Seminars

4.41 With the cooperation of various educational institutions and publishing associations, the Training Board has been organizing practical skill-oriented short courses/seminars for in-service personnel in the printing and publishing industries. These out-centre courses/seminars aim at upgrading and updating the knowledge and skills of in-service personnel to help them cope with the changing economy and business requirements. The Training Board believes that these out-centre training courses/seminars are effective in achieving the aim and recommends publishing employers to make good use of these out-centre courses and seminars for upgrading their employees.

印刷及出版業 2014年度人力調查 報告摘要

簡介

印刷及出版業訓練委員會於 2014 年5月中至 10 月中進行人力調查，蒐集印刷業及出版業的最新人力資料。兩行業至今已第八次聯合進行人力調查。

2. 政府統計處登記的印刷及出版機構共有5 797間，是次實地調查覆蓋其中 904 間。蒐集所得的數據經統計方式倍大，以反映兩個行業的整體人力情況。

調查結果

3. 調查顯示，在2014年5月時，印刷業及出版業分別僱有17 690人及10 649人。各門類不同技能等級的僱員分布情況如下：

(A) 印刷業

門類 \ 技能等級	技師／管理	技術員／ 督導	技工	非技術 人員	總計	佔僱員總數 百分率
1. 報紙印刷	17	88	309	110	524	3.0%
2. 商業印刷	698	3 484	6 041	759	10 982	62.1%
3. 其他印刷及有關 活動	88	490	576	139	1 293	7.3%
4. 容器、紙盒及 紙板盒	13	43	242	38	336	1.9%
5. 印務代理	458	2 567	47	31	3 103	17.5%
6. 選定機構	136	643	556	117	1 452	8.2%
總計	1 410	7 315	7 771	1 194	17 690	100%
佔僱員總數百分率	8.0%	41.4%	43.9%	6.7%	100%	

(B) 出版業

技能等級 門類	經理	主任	技術人員	總計	佔僱員總數 百分率
1. 報紙出版	358	845	1 988	3 191	30.0%
2. 出版及有關活動	1 105	1 405	3 946	6 456	60.6%
3. 書報及期刊批發	34	29	106	169	1.6%
4. 書報及期刊進出口 貿易	158	139	269	566	5.3%
5. 選定機構	54	134	79	267	2.5%
總計	1 709	2 552	6 388	10 649	100%
佔僱員總數百分率	16.0%	24.0%	60.0%	100%	

4. 據僱主填報，調查期間，印刷業共有32名受訓者（佔人力0.2%）及322個職位空缺（佔人力1.8%）；出版業有63名受訓者（佔人力0.6%）及181個職位空缺（佔人力1.7%）。此外，僱主估計至2015年5月時，印刷業總共僱用18 010人（上升1.8%），出版業總共僱用10 894人（上升2.3%）。

人力變化

(A) 印刷業

5. 相對於2012年的調查結果，印刷業的人力按年減少1.9%。本會認為，過去兩年業內的人力轉變受下列因素影響：

- (a) 自上次2012年5月的人力調查後，印刷業再度經歷艱難時期。2014年調查顯示，業內機構總數較2012年5月時減少162間。調查亦發現，整體而言，技師／管理級的人力按年增加6.5%，而技術員／督導級及技工級的人力則按年分別減少4.2%及0.7%；
- (b) 與往常一樣，印刷業普遍較難聘請足夠的技術人手。為應付此情況及業內機構使用自動化設施的趨勢，從業員需負擔更多工作。業內的經理（技師／管理級）需要分擔部分技術員／督導級的職務。因此，技術人力的質素及生產力普遍有所提升；
- (c) 部分機構採用互聯網科技，於中國內地進行印前工作，令資訊科技經理（技師／管理級）、資訊科技技術員（技術員／督導級）及電子印前系統操作技工（技工級）的人力按年分別減少9.1%、14.4%及1.6%；

- (d) 配合改善服務及開拓商機的需要，業內的管理級人力普遍增加，惟採購經理及資訊科技經理（印刷）則例外；
- (e) 調查顯示，愈來愈多機構增加數碼印刷業務，同時減少柯式印刷工作，數碼印刷系統操作技工的人力因而上升，而從事柯式印刷相關工作的人員則減少。另一方面，由於市場對立體書及其他特製書籍的印製需求高企，令其他印刷機械及包裝印刷操作技工和啤盒工／造模工的人力按年分別增加10.7%及17.2%。

(B) 出版業

6. 相對於2012年的調查結果，出版業的人力按年增加3.7%。本會認為，過去兩年業內的人力增長受下列因素影響：

- (a) 電子出版業務於過去兩年持續增長，吸引不少自由撰稿人及新公司加入。網上出版方興未艾。更多本地報章、地區甚至環球報章及主要雜誌均推出網上服務。是次調查顯示，2014年業內機構較2012年增加了57間。
- (b) 調查顯示，將門類一（報紙出版）及門類二（出版及有關活動）的人力合併計算後，經理級及技術人員級的人力按年分別增加3.6%及6.6%。這兩個門類的人力增長，抵銷了門類三、四、五內三個技能等級的人力流失。調查顯示，整體而言，經理級及技術人員級的人力按年分別增加2.3%及14.1%，主任級的人力則按年減少12.8%；
- (c) 基於(a)所載的原因，技術人員級的助理編輯／稿件編輯／美術編輯／校對員、美術設計員／插圖員及桌面排版操作員的人力按年分別大增31.6%、22.7%及31.6%；
- (d) 另一方面，調查顯示，業內520間從事電子出版業務的機構共僱有1 453人（見表 2.32）。與2012年的數據相比（273間機構，988名僱員），2014年從事電子出版的機構增加了247間，僱員亦增加了465人。然而，電子出版主任（主任級）的人力按年減少30.3%，電子出版經理（經理級）的人數則維持不變，反映這方面的職務已轉由其他相關主要職務的經理級及主任級人員擔任，例如電子出版經理及策劃編輯；以及
- (e) 過去兩年，主任級的人力按年大跌12.8%。主要職務中的營業主任及客戶服務主任（書籍）的人力按年分別銳減29.0%及36.6%。營業主任的流動率高企，反映此類職務人員可輕易於其他行業物色工作。他們離職後，職務會由同級的發行主任、經理級的市場總監／市場經理以及技術人員級的市務助理／宣傳助理分擔，因此這些職位的人力分別按年增加37.4%、21.4%及15.8%。

結論與建議

7. 自上次2012年5月的人力調查後，印刷業及出版業再次面臨考驗。雖然如此，香港仍是全球主要的印刷及出版中心之一。印刷業及出版業的經營面對重重挑戰，人民幣不斷升值、工資上漲、稅項增加，以及油價、利率及貨幣反覆上落令能源及原材料價格波動；珠江三角洲勞工短缺及內地實施《勞動合同法》及加工貿易政策更構成另一項隱憂，影響營運開支。除了內地同行之外，本港印刷公司亦要面對亞洲區內其他多個生產商的激烈競爭。另一方面，自從2012年5月實施第七階段《內地與香港關於建立更緊密經貿關係的安排》（CEPA VII）以來，香港一直享受進口貨品零關稅優惠；中央政府更於2013年3月公布「十二五」規劃，加上香港與內地於2012年6月29日簽訂CEPA補充協議九，將會繼續為本港企業及印刷出版行業提供大量商機。再者，香港擁有優越的電訊網絡，作為印刷業及出版業的重要資產，有利數碼印刷及電子出版蓬勃發展。

8. 全球經濟情況反覆波動。美國方面，由於經濟增長及就業情況改善，聯邦儲備局於2014年10月底結束其大型債券購買計劃。歐洲方面，由於經濟增長疲弱，失業率高企，消費物價指數處於負水平，歐洲中央銀行遂於2015年1月推出購買債券刺激經濟計劃。為了對抗經濟低迷及防止歐元區的經濟步向通縮，歐洲中央銀行將會每月注資6,000億歐元改善經濟狀況，至2016年9月底為止。上述各種舉措於未來幾年將對印刷業及出版業產生一定程度的影響。然而，內地改革和持續發展可為全球以至本港行業帶來更多商機。綜合上述原因，本會對印刷業今後的發展持審慎樂觀的看法，相信業界可繼續穩定發展；另亦認為出版業未來幾年會有溫和增長。本會建議僱主採取下列措施，以應付目前情況和未來挑戰：

- (i) 緊貼印刷及出版業務科技的最新發展，尤其是數碼印刷及電子出版方面；
- (ii) 實施標準化工序／服務，精簡及多元發展業務，令機構的運作更靈活，提升成效和效率；
- (iii) 發展更具創意、高增值、富成本效益、優質及環保的產品／服務（尤其是跨媒體領域），以提升機構的競爭力；
- (iv) 透過適當培訓，進一步提升員工的整體技術水平和才能，尤其是資訊科技、設計及創意等技能，令機構更具實力和競爭力；
- (v) 繼續以最具成本效益的方法在特定產品市場開拓新業務，擴大市場佔有率；以及
- (vi) 維繫重點客戶，加強伙伴關係，並與潛在客戶建立合作關係。

9. 至於員工的技術和能力水平，本會建議僱主除了考慮公司的個別培訓需求外，亦可參考附錄 15 及附錄 16 所載印刷業和出版業的「僱員所需訓練（各門類）」資料。在目前的情況下，僱主宜加強培訓力度，確保有足夠的幹練人才應對今後的挑戰和發展商機。此外，本會亦建議職業訓練局（VTC）及其他培訓機構密切留意以上的培訓需求，適時為印刷及出版業提供所需培訓服務。

10. 本會預計印刷及出版業整體每年在各技能等級需增加的人手如下：

技能等級	每年需增加人手數目	
	印刷業	出版業
技師／管理／經理	84 (6.0%)	63 (3.7%)
技術員／督導／主任	222 (3.0%)	79 (3.1%)
技工／技術人員	240 (3.0%)	223 (3.5%)

(註：括弧內數字為每年需受訓人手在各技能等級人力中所佔百分率)

11. 本會敦促僱主加強培訓工作，配合印刷業及出版業的持續發展。香港知專設計學院的傳意設計及數碼媒體學系、卓越培訓發展中心（印刷業）、印刷科技研究中心均辦有各類兼讀制課程，僱主亦應善用以增強從業員的才幹。本會又鼓勵僱主聯絡VTC以制訂培訓計劃，並透過印刷業「職」學創前路先導計劃及新科技培訓計劃，讓僱員學習新科技。

第一章

緒論

印刷及出版業訓練委員會

1.1 印刷及出版業訓練委員會（下稱「本會」）隸屬職業訓練局（VTC），根據職權範圍，須負責評定印刷及出版兩大行業的人力需求，並為配合人力需求向VTC提供培訓設施發展建議。本會的委員名單及職權範圍分別載於附錄1及附錄2。

人力調查

1.2 本會在政府統計處（下稱「統計處」）協助下，於2014年5月中至10月中進行人力調查，蒐集印刷及出版兩個行業的最新人力資料。

1.3 調查所得的資料如下：

- (a) 調查期間的僱員人數；
- (b) 受訓僱員人數；
- (c) 現有空缺數目；
- (d) 僱主預測至2015年5月時的僱員總數
- (e) 僱主對僱員宜有教育程度、訓練方式及訓練期的意見；
- (f) 僱員的平均收入；
- (g) 晉升僱員人數；
- (h) 是否在中國內地設有廠房；
- (i) 招聘困難；以及
- (j) 僱員的培訓需求。

1.4 此外，本會亦請印刷業僱主填報調查前12個月內，派駐港外地方工作超過六個月的技師／管理人員、技術員及技工人數。

調查範圍

1.5 是次調查涵蓋下列行業：

(A) 印刷業

門類 1 -- 報紙印刷 (HSIC 581201)

門類 2 -- 商業印刷 (HSIC 181100)

門類 3 -- 印刷及有關活動 (主要為書籍釘裝、賀卡的美化修飾、印刷版製作、排字及加印浮凸花紋等) (HSIC 181201、181202、181299)

門類 4 -- 容器、紙盒及紙板盒 (只限於印刷相關活動) (HSIC 170201、170202)

門類 5 -- 印務代理 (HSIC 829300)

門類 6 -- 選定機構 (包括印刷器材及物料供應商、金屬罐製造商，以及學術機構的印刷部門)

(B) 出版業

門類 1 -- 報紙出版 (HSIC 581201*)

門類 2 -- 出版及有關活動 (HSIC 581100、581202、581900)

門類 3 -- 書報及期刊批發 (HSIC 460423)

門類 4 -- 書報及期刊進出口貿易 (HSIC 451423、452423)

門類 5 -- 選定機構的出版部門

- 註：
1. HSIC (Hong Kong Standard Industrial Classification) 是指「香港標準行業分類」
 2. *2014年新增出版業HSIC分類

1.6 「選定機構」包括開辦印刷技術課程的教育及培訓機構、學術機構及政府的印刷部門／代理公司、印刷器材及物料供應商、金屬罐製造商，以及僱有出版人員的公營機構。

1.7 根據上文第 1.5 段所列的分類，統計處共錄得 4 142 間印刷機構及 1 655 間出版機構。按 HSIC 分類的業內機構情況見表 1.1、表 1.2、圖 1.1 及圖 1.2。

表 1.1： 印刷業機構的分布情況（HSIC 分類）

門類		機構數目	佔機構總數百分率
1. 報紙印刷	HSIC 581201	43	1.0%
2. 商業印刷	HSIC 181100	2 280	55.0%
3. 印刷及有關活動	HSIC 181201、181202、 181299	281	6.8%
4. 容器、紙盒及紙板盒 (只限於印刷相關活動)	HSIC 170201、170202	174	4.2%
5. 印務代理	HSIC 829300	1 301	31.4%
6. 選定機構		63	1.5%
總計		4 142	100%

圖 1.1： 各門類印刷機構的分布情況

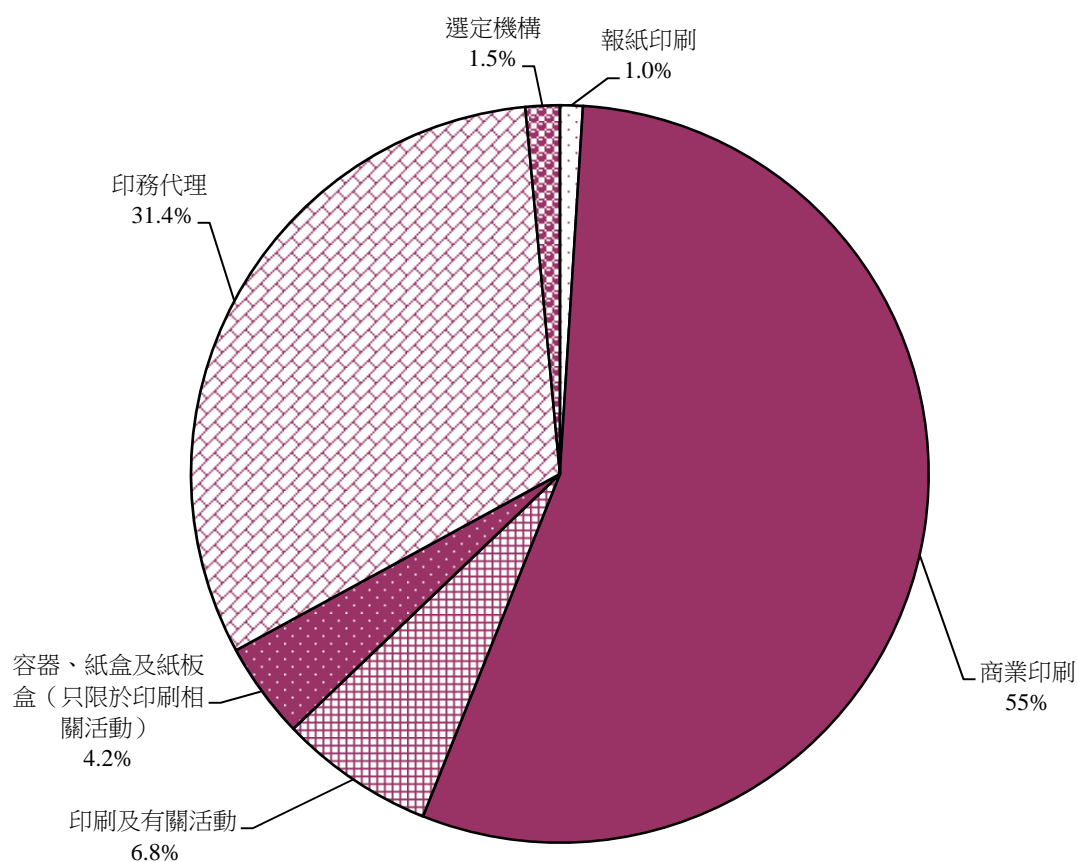
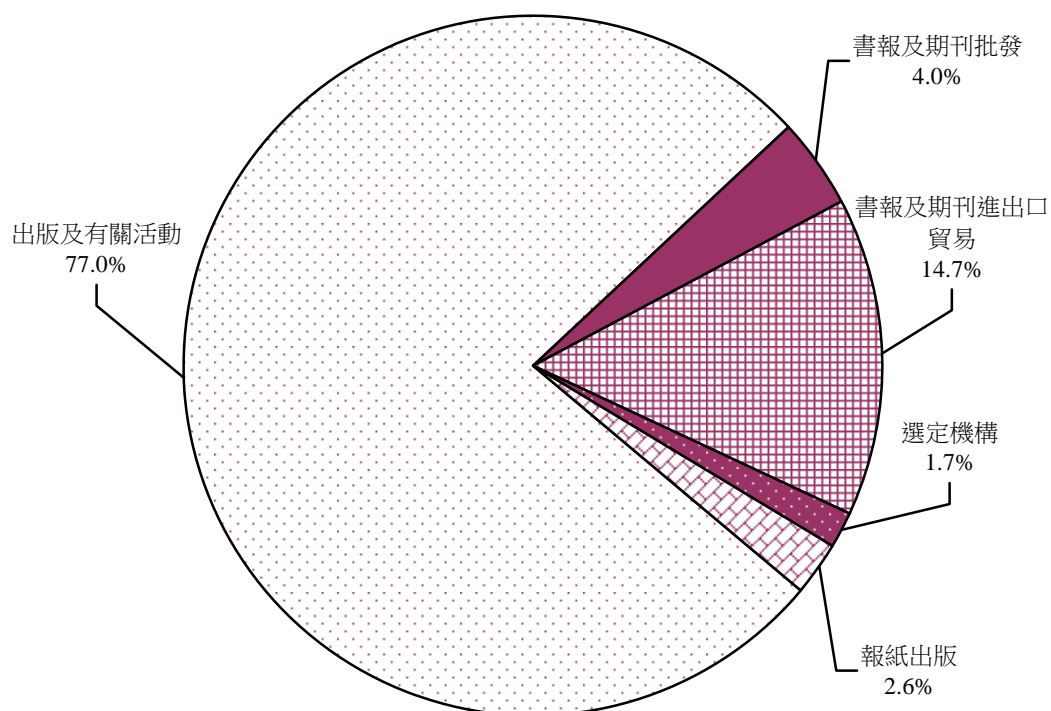


表 1.2： 出版業機構的分布情況（HSIC 分類）

門類	機構數目	佔機構總數百分率
1. 報紙出版 – HSIC 581201	43	2.6%
2. 出版及有關活動 – HSIC 58110、581202、581900	1 274	77.0%
3. 書報及期刊批發 – HSIC 460423	67	4.0%
4. 書報及期刊進出口貿易 – HSIC 451423、452423	243	14.7%
5. 選定機構	28	1.7%
總計	1 655	100%

圖 1.2： 各門類出版機構的分布情況



1.8 由於資源所限，本會採用分層隨機抽樣方法，抽選出629間印刷及相關機構（包括教育及培訓機構、政府的印刷部門／代理公司），以及275間出版機構作為調查樣本。

宣傳

1.9 實地調查之前，本會於本地的報章刊登宣傳稿。承蒙下列商會協助呼籲屬下會員機構提供資料：

- (a) 香港印刷業商會；
- (b) 香港印藝學會有限公司；
- (c) 香港中華廠商聯合會；
- (d) 香港工業總會；
- (e) 香港報業公會；
- (f) 香港教育出版專業協會有限公司；以及
- (g) 香港出版學會。

調查方法

1.10 實地調查展開前，本會將印刷及出版業的調查表連同附註，以及主要職務的工作說明等文件郵寄予兩行行業的受訪機構（詳見附錄 3、4）。

1.11 實地調查期間，統計處調查人員登門造訪，向上述機構收取填妥的調查表，按需要解答問題及協助僱主填報資料。

1.12 調查所得的數據均經過複查，並於有需要時與填覆機構核實，然後利用統計學方法倍大，以反映兩個行業的整體人力情況。

調查回應

1.13 在904間機構中，共有653間提供人力資料；66間機構已結業、搬遷或不再從事印刷及出版行業；32間機構拒絕提供資料。調查的有效回應率為95.3%。

人力調查報告

1.14 本報告載有調查結果、本會對印刷及出版兩個行業人力需求的預測，以及回應人力需求的建議措施。在本報告書內，「僱員」一詞是指受僱於54個主要職務的人士，不包括受訓者及學徒；而「受訓者」則泛指正在業內接受各種訓練的人士，以及根據學徒合約受僱的學徒。

第二章

調查結果摘要

僱員人數

2.1 調查顯示，2014年5月中至10月中，印刷業26個主要職務共有17 690名僱員，而出版業27個主要職務則有10 649名僱員。按門類劃分，印刷業內的門類一「報紙印刷」有524名、門類二「商業印刷」有10 982名、門類三「其他印刷及有關活動」有1 293名、門類四「容器、紙盒及紙板盒」有336名、門類五「印務代理」有3 103名、門類六「選定機構」有1 452名。出版業方面，新設的門類一「報紙出版」有僱員3 191名、門類二「出版及有關活動」有僱員6 456名、門類三「書報及期刊批發」有169名、門類四「書報及期刊進出口貿易」有566名、門類五「選定機構」有267名。按技能等級劃分，印刷業有1 410名技師／管理人員、7 315名技術員／督導人員、7 771名技工、1 194名非技術人員。出版業則有1 709名經理、2 552名主任、6 388名技術人員。兩個行業的詳細人力統計數字分別載於附錄5及附錄6；各門類各技能等級的僱員分布則詳載於表2.1、表2.2及圖2.1至圖2.4：

表 2.1： 印刷業僱員分布情況
(按門類及技能等級劃分)

門類 \ 技能等級	技師／管理	技術員／督導	技工	非技術人員	總計	佔僱員總數百分率
1.報紙印刷	17	88	309	110	524	3.0%
2.商業印刷	698	3 484	6 041	759	10 982	62.1%
3.其他印刷及有關活動	88	490	576	139	1 293	7.3%
4.容器、紙盒及紙板盒	13	43	242	38	336	1.9%
5.印務代理	458	2 567	47	31	3 103	17.5%
6.選定機構	136	643	556	117	1 452	8.2%
總計	1 410	7 315	7 771	1 194	17 690	100%
佔僱員總數百分率	8.0%	41.4%	43.9%	6.7%	100%	

圖 2.1： 印刷業僱員分布情況（按門類劃分）

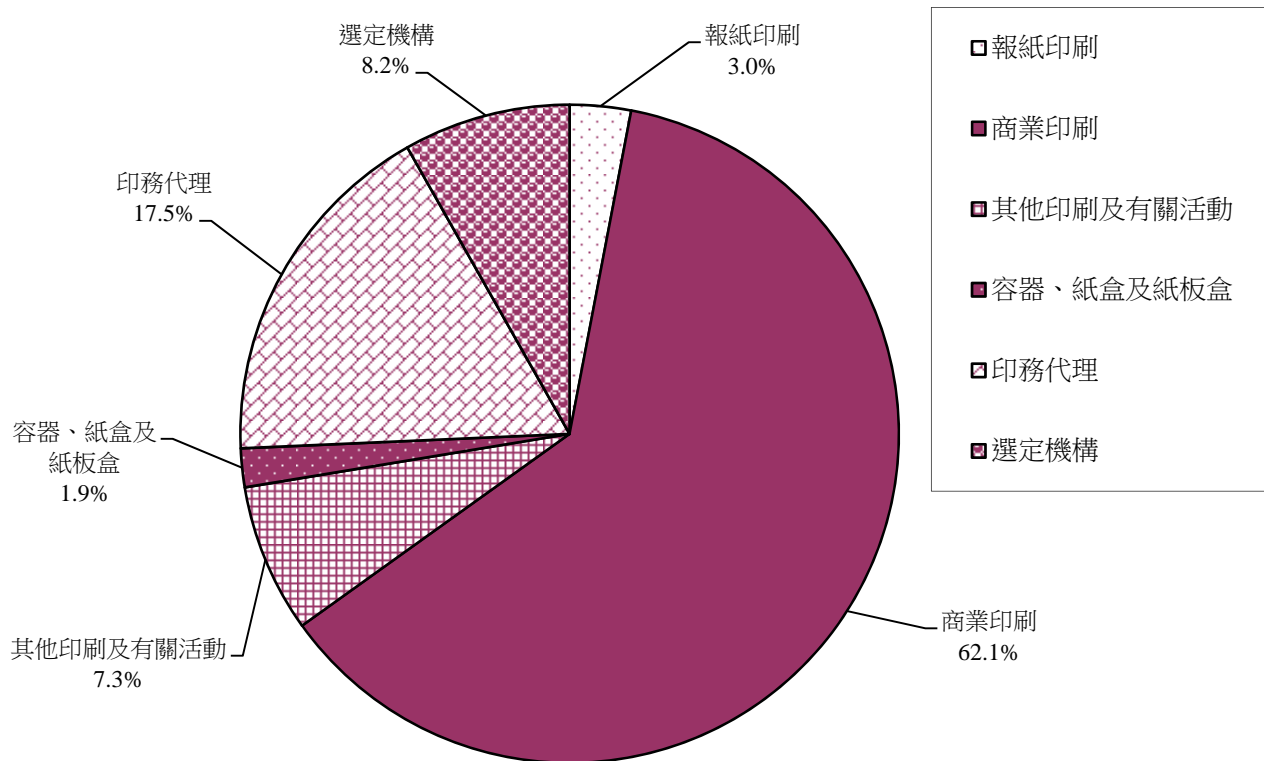


圖 2.2： 印刷業僱員分布情況（按技能等級劃分）

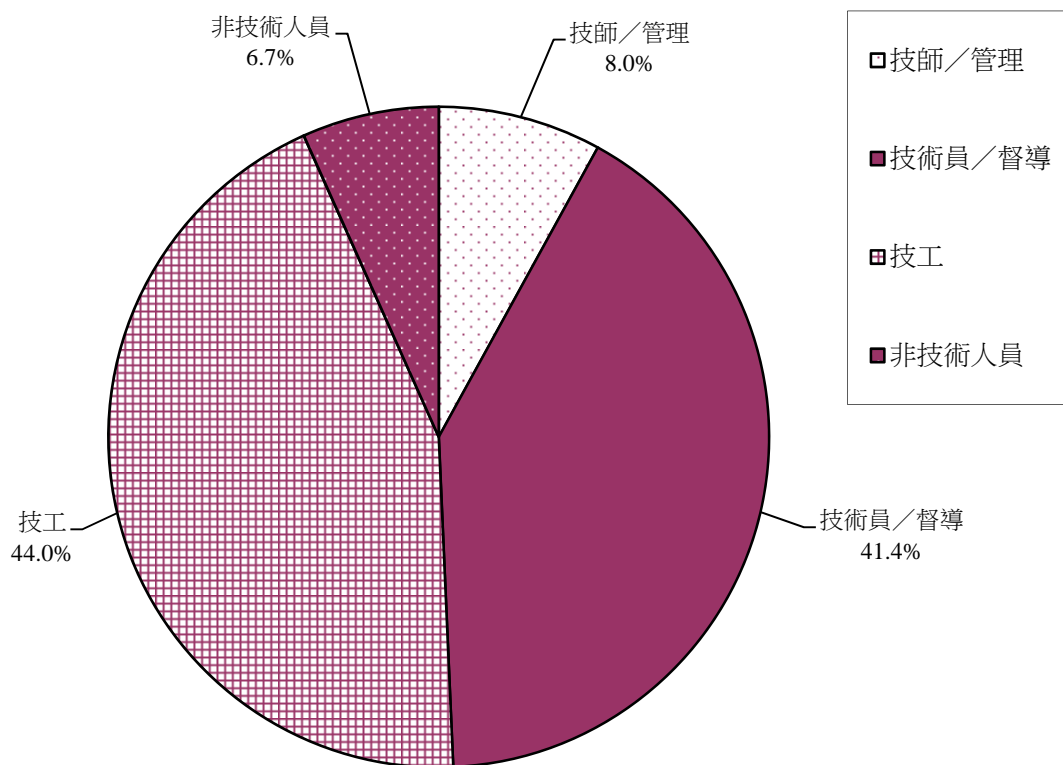


表 2.2： 出版業僱員分布情況
(按門類及技能等級劃分)

技能等級 門類	經理	主任	技術人員	總計	佔僱員總數百分率
1. 報紙出版	358	845	1 988	3 191	30%
2. 出版及有關活動	1 105	1 405	3 946	6 456	60.6%
3. 書報及期刊批發	34	29	106	169	1.6%
4. 書報及期刊進出口貿易	158	139	269	566	5.3%
5. 選定機構	54	134	79	267	2.5%
總計	1 709	2 552	6 388	10 649	100%
佔僱員總數百分率	16.0%	24.0%	60.0%	100%	

圖 2.3： 出版業僱員分布情況 (按門類劃分)

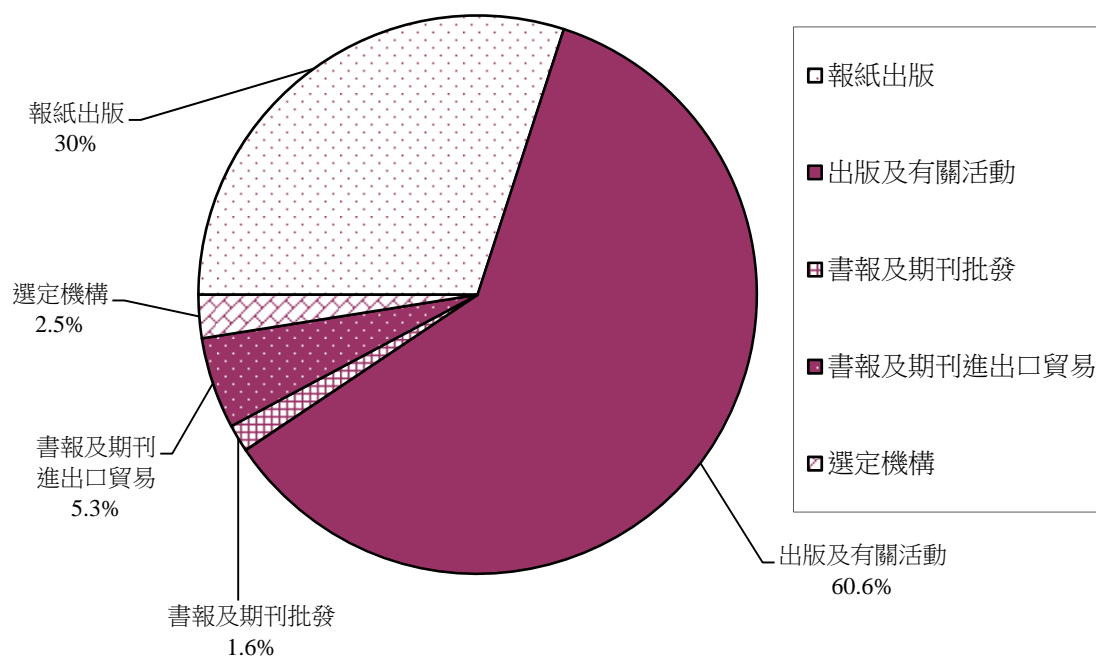
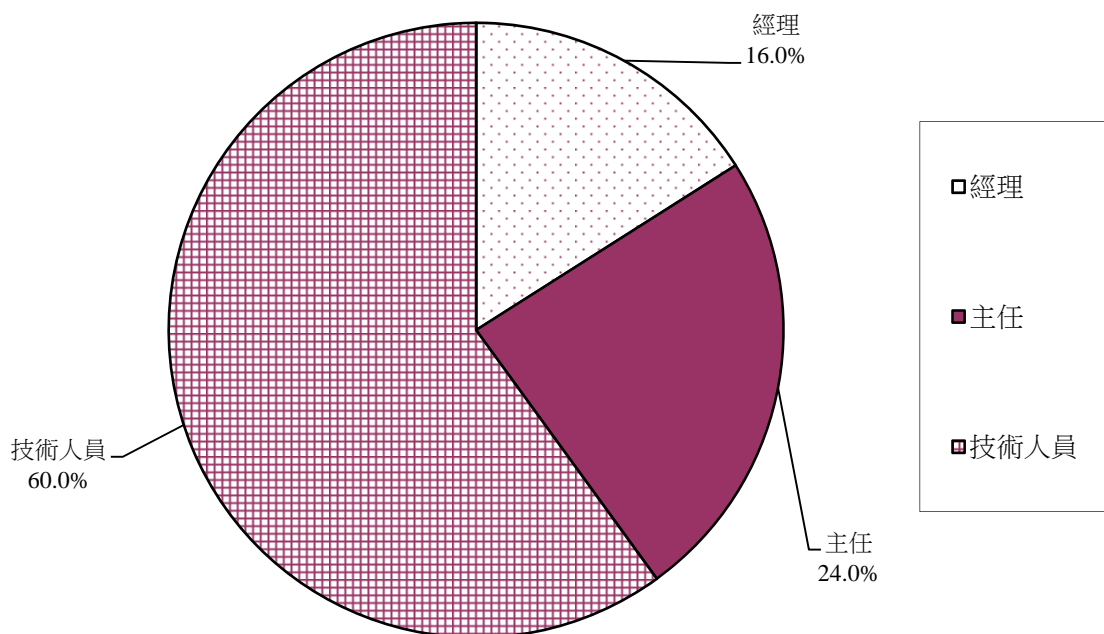


圖 2.4： 出版業僱員分布情況（按技能等級劃分）



2.2 綜合過往的訓練委員會（前印刷業訓練委員會；前廣告、公共關係及出版業訓練委員會）以及本會的人力調查資料，兩個行業各技能等級僱員的分布情況見表2.3、表2.4及圖2.5、圖2.6）：

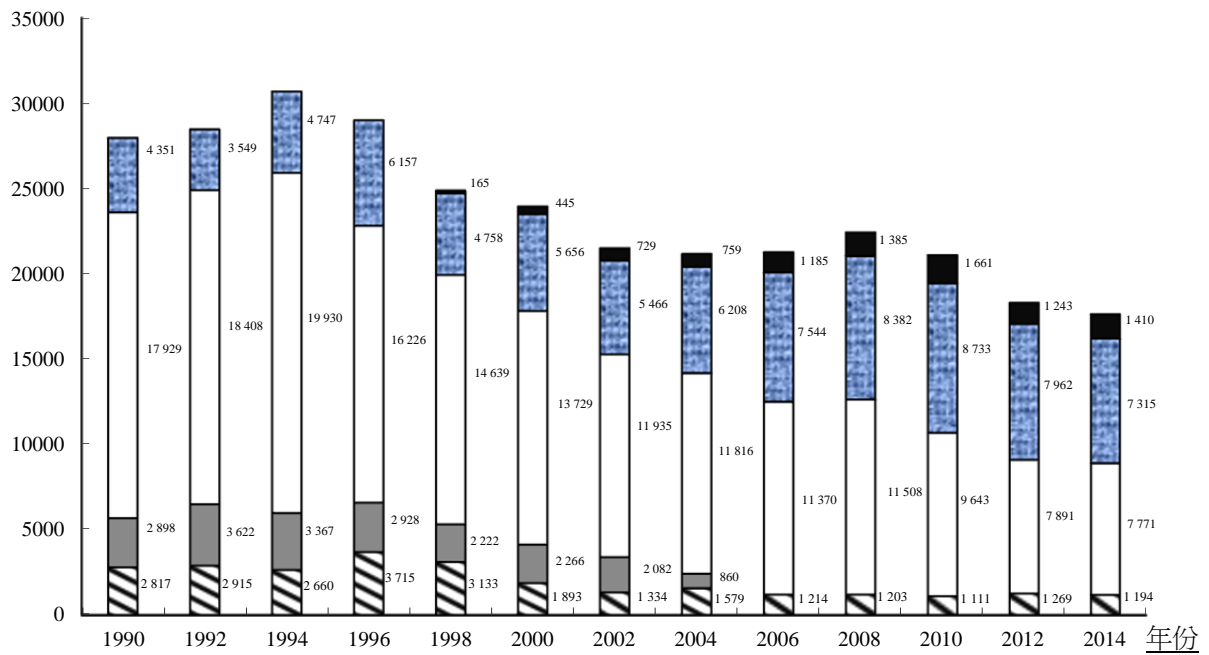
**表 2.3： 印刷業各技能等級僱員分布情況
（1990年至2014年人力調查）**

年份	僱員人數					總人力
	*技師／管理級	技術員／督導級	技工級	操作工級	非技術人員級	
1990	-	4 351	17 929	2 898	2 817	27 995
1992	-	3 549	18 408	3 622	2 915	28 494
1994	-	4 747	19 930	3 367	2 660	30 704
1996	-	6 157	16 226	2 928	3 715	29 026
1998	165	4 758	14 639	2 222	3 133	24 917
2000	445	5 656	13 729	2 266	1 893	23 989
2002	729	5 466	11 935	2 082	1 334	21 546
2004	759	6 208	11 816	860	1 579	21 222
2006	1 185	7 544	11 370	-	1 214	21 313
2008	1 385	8 382	11 508	-	1 203	22 478
2010	1 661	8 733	9 643	-	1 111	21 148
2012	1 243	7 962	7 891	-	1 269	18 365
2014	1 410	7 315	7 771	-	1 194	17 690

* 技師／管理級人力的調查始於1998年，並於後來的調查中擴闊範圍以涵蓋更多主要職務。操作工級主要職務的分類則於2006年調查刪除。

圖 2.5： 印刷業各技能等級僱員分布情況
(1990年至2014年人力調查)

僱員人數

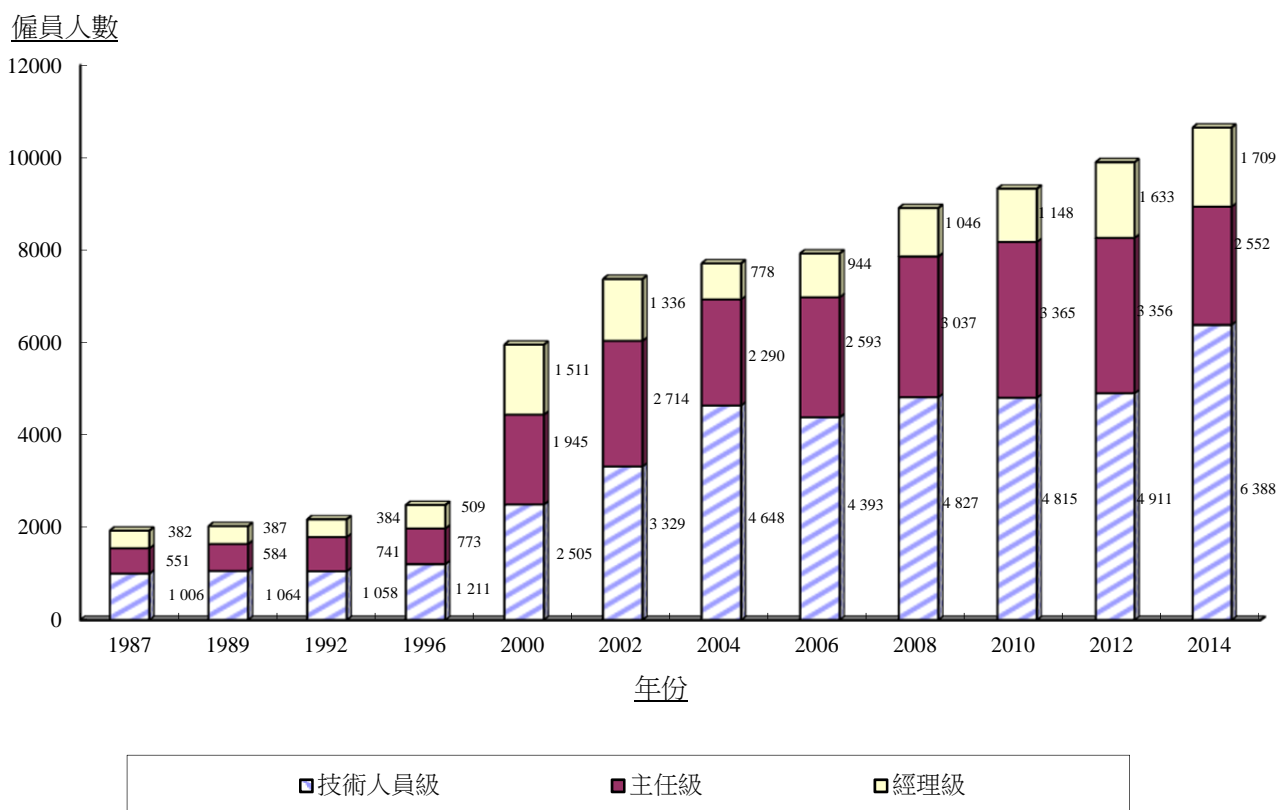


非技術人員級
 操作工級
 技工級
 技術員/督導員
 技師/管理級

表 2.4： 出版業各技能等級僱員分布情況
(1987年至2014年人力調查)

年份	僱員人數			總人力
	經理級	主任級	技術人員級	
1987	382	551	1 006	1 939
1989	387	584	1 064	2 035
1992	384	741	1 058	2 183
1996	509	773	1 211	2 493
2000	1 511	1 945	2 505	5 961
2002	1 336	2 714	3 329	7 379
2004	778	2 290	4 648	7 716
2006	944	2 593	4 393	7 930
2008	1 046	3 037	4 827	8 910
2010	1 148	3 365	4 815	9 328
2012	1 633	3 356	4 911	9 900
2014	1 709	2 552	6 388	10 649

圖 2.6： 出版業各技能等級僱員分布情況
(1987年至2014年人力調查)



受訓者人數

2.3 調查期間，印刷業共有32名受訓者，佔僱員總數0.2%；出版業共有63名受訓者，佔僱員總數0.6%。兩個行業受訓者的詳細統計資料分別載於附錄5及附錄6；各門類各技能等級的受訓者分布詳情則列載於表2.5及表2.6：

表 2.5： 印刷業受訓者分布情況

技能等級 門類	技師／管理	技術員／ 督導	技工	非技術 人員	總計	佔同一門類 僱員總數百分率
1. 報紙印刷	-	-	-	-	-	-
2. 商業印刷	4	13	13	-	30	0.3%
3. 其他印刷及有 關活動	-	-	-	-	-	-
4. 容器、紙盒及 紙板盒	-	-	-	-	-	-
5. 印務代理	-	-	-	-	-	-
6. 選定機構	-	-	2	-	2	0.1%
總計	4	13	15	-	32	0.2%
佔同一技能等級 僱員總數百分率	0.3%	0.2%	0.2%	-	0.2%	

表 2.6： 出版業受訓者分布情況

技能等級 門類	經理	主任	技術人員	總計	佔同一門類 僱員總數百分率
1. 報紙出版	-	-	6	6	0.2%
2. 出版及有關活動	-	-	56	56	0.9%
3. 書報及期刊批發	-	-	-	-	-
4. 書報及期刊進出口貿易	-	-	-	-	-
5. 選定機構	-	-	1	1	0.4%
總計	-	-	63	63	0.6%
佔同一技能等級 僱員總數百分率	-	-	1.0%	0.6%	

空缺數目

2.4 調查期間，印刷業共有322個職位空缺，佔僱員總數1.8%；出版業則有181個職位空缺，佔僱員總數1.7%。兩個行業的職位空缺統計數字分別載於附錄5及附錄6；各門類各技能等級的空缺分布則列載於表2.7及表2.8：

**表 2.7： 印刷業空缺分布情況
(按門類及技能等級劃分)**

門類 \ 技能等級	技師／管理	技術員／ 督導	技工	非技術 人員	總計	佔同一門類 僱員總數百分率
1. 報紙印刷	-	1	17	-	18	3.4%
2. 商業印刷	1	48	140	26	215	2.0%
3. 其他印刷及有關 活動	-	2	7	1	10	0.8%
4. 容器、紙盒及 紙板盒	-	-	30	-	30	8.9%
5. 印務代理	-	16	-	1	17	0.5%
6. 選定機構	-	6	10	16	32	2.2%
總計	1	76	201	44	322	1.8%
佔同一技能等級 僱員總數百分率	0.1%	1.0%	2.6%	3.7%	1.8%	

**表 2.8： 出版業空缺分布情況
(按門類及技能等級劃分)**

門類 \ 技能等級	經理	主任	技術人員	總計	佔同一門類 僱員總數百分率
1. 報紙出版	1	-	-	1	0.03%
2. 出版及有關活動	2	74	97	173	2.7%
3. 書報及期刊批發	-	-	2	2	1.2%
4. 書報及期刊進出口貿易	-	-	5	5	0.9%
5. 選定機構	-	-	-	-	-
總計	3	74	104	181	1.7%
佔同一技能等級 僱員總數百分率	0.2%	2.9%	1.6%	1.7%	

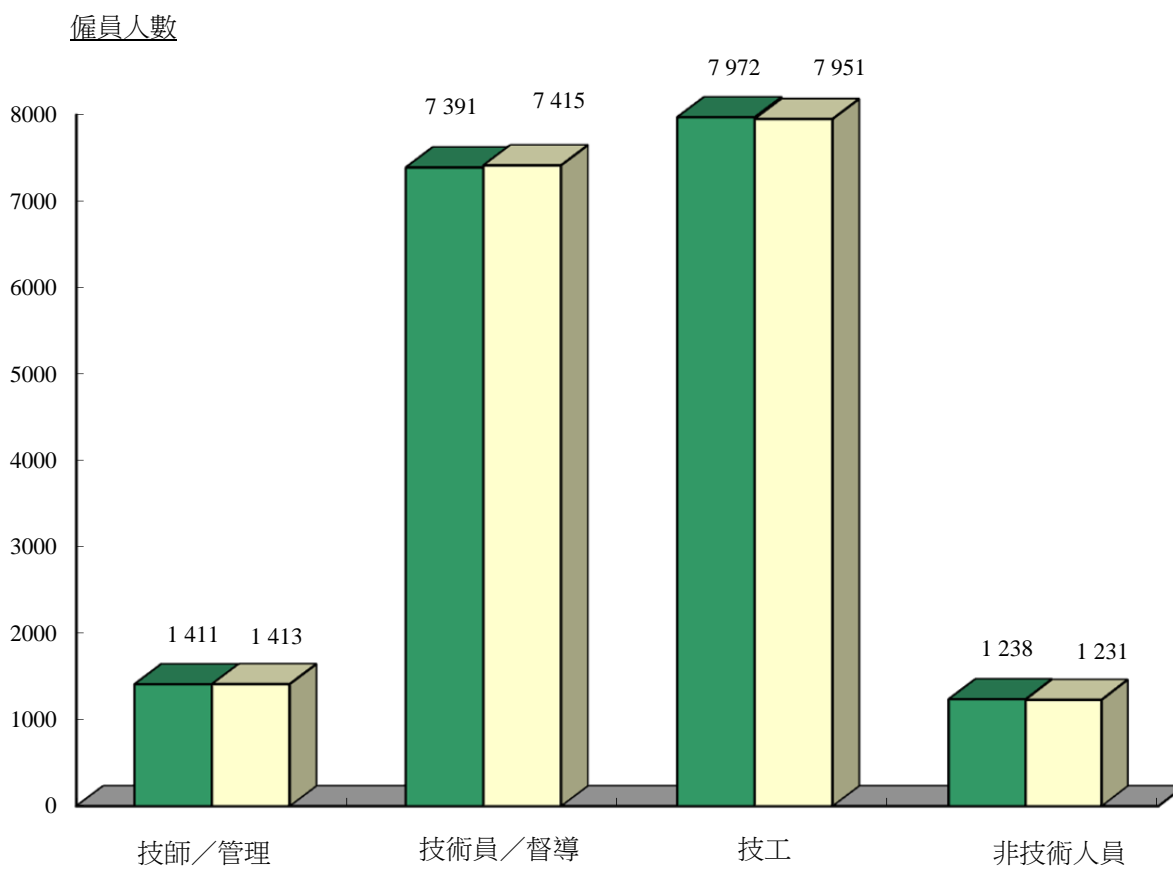
預測至2015年5月時的僱員人數

2.5 據僱主預測，至2015年5月時印刷業和出版業將分別僱用18 010人和10 894人。兩個行業的人力預測詳情分別載於附錄5及附錄6；按技能等級劃分的僱主預測人力數字則列載於表2.9及表2.10：

**表 2.9： 僱主意見：印刷業人力需求（2014年5月時）
及人力預測（2015年5月時）**

技能等級	調查期間 僱員人數	空缺數目	調查期間 總人力需求	預測至2015年 5月 僱員人數	預測僱員增(+) /減(-)人數
技師／管理	1 410	1	1 411	1 413	+ 2
技術員／督導	7 315	76	7 391	7 415	+ 24
技工	7 771	201	7 972	7 951	- 21
非技術人員	1 194	44	1 238	1 231	- 7
總計	17 690	322	18 012	18 010	- 2

圖 2.7： 人力需求數字比較
(2014年5月與2015年5月)



技能等級

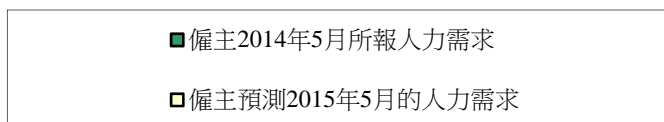
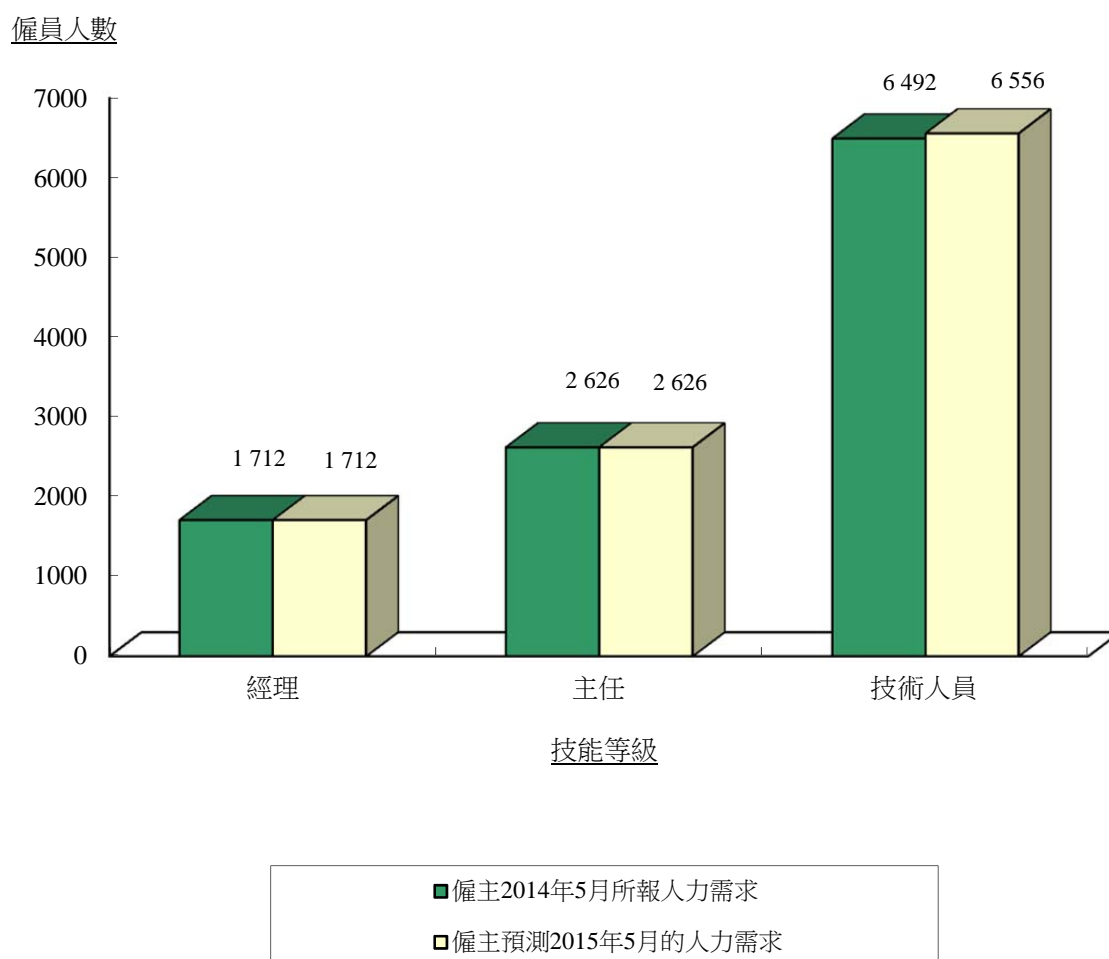


表 2.10： 僱主意見：出版業人力需求（2014年5月時）
及人力預測（2015年5月）

技能等級	調查期間 僱員人數	空缺數目	調查期間 總人力需求	預測至2015年 5月 僱員人數	預測僱員增(+) ／減(-) 人數
經理	1 709	3	1 712	1 712	-
主任	2 552	74	2 626	2 626	-
技術人員	6 388	104	6 492	6 556	+ 64
總計	10 649	181	10 830	10 894	+ 64

圖 2.8： 人力需求數字比較
（2014年5月與2015年5月）



僱員宜有教育程度

2.6 據大部分印刷業和出版業僱主的意見，各技能等級僱員宜有表2.11和表2.12所示的教育程度：

表 2.11： 印刷業僱主意見－僱員宜有教育程度

技能等級	宜有教育程度
技師／管理	大學學位／文憑
技術員／督導	證書／中四至中七／香港中學文憑或同等學歷
技工	技工證書／中三或以下

表 2.12： 出版業僱主意見－僱員宜有教育程度

技能等級	宜有教育程度
經理	大學學位
主任	大學學位
技術人員	文憑／高級證書

2.7 印刷業和出版業僱主的詳細意見分別載於附錄7及附錄8。

僱員宜有訓練期

2.8 據大部分印刷業和出版業僱主的意見，各技能等級僱員宜有表2.13和表2.14所示的訓練期：

表 2.13： 印刷業僱主意見－僱員宜有訓練期

技能等級	宜有訓練期
技師／管理	四年或以上
技術員／督導	兩年至三年
技工	一年至兩年

表 2.14： 出版業僱主意見－僱員宜有訓練期

技能等級	宜有訓練期
經理	四年或以上
主任	兩年至三年
技術人員	兩年至三年

2.9 印刷業和出版業僱主的詳細意見分別載於附錄9及附錄10。

僱員宜有訓練形式

2.10 據大部分印刷業和出版業僱主的意見，各技能等級僱員宜接受的訓練形式載於表2.15和表2.16：

表 2.15： 印刷業僱主意見－僱員宜有訓練形式

技能等級	宜有訓練形式
技師／管理	在職訓練
技術員／督導	在職訓練
技工	學徒訓練／在職訓練

表 2.16： 出版業僱主意見－僱員宜有訓練形式

技能等級	宜有訓練形式
經理	在職訓練
主任	在職訓練
技術人員	在職訓練

2.11 印刷業和出版業僱主的詳細意見分別載於附錄11及附錄12。

僱員每月總收入幅度

2.12 印刷業和出版業僱員每月總收入幅度分布情況見表2.17及表2.18：

表 2.17： 印刷業僱員分布情況
(按每月總收入幅度劃分)

技能等級	\$8,000 或以下	\$8,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$30,000	\$30,001 - \$45,000	\$45,001 - \$60,000	\$60,001 或以上	未有註明	總計
技師／管理	-	1	24	89	498	415	77	48	258	1 410
技術員／督導	32	236	2 545	2 760	682	100	14	4	942	7 315
技工	51	802	5 011	959	65	-	-	-	883	7 771
非技術人員	128	668	181	-	-	-	-	-	217	1 194
總計	211	1 707	7 761	3 808	1 245	515	91	52	2 300	17 690
佔僱員總數 百分率	1.2%	9.6%	43.9%	21.5%	7.0%	2.9%	0.5%	0.3%	13.0%	100%

表 2.18： 出版業僱員分布情況
(按每月總收入幅度劃分)

技能等級	\$8,000 或以下	\$8,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$30,000	\$30,001 - \$45,000	\$45,001 - \$60,000	\$60,001 或以上	未有註明	總計
經理	56	-	-	40	99	577	272	102	563	1 709
主任	-	7	17	570	928	271	43	6	710	2 552
技術人員	-	140	1 794	2 236	293	-	-	-	1 925	6 388
總計	56	147	1 811	2 846	1 320	848	315	108	3 198	10 649
佔僱員總數 百分率	0.5%	1.4%	17.0%	26.7%	12.4%	8.0%	3.0%	1.0%	30.0%	100%

2.13 印刷業和出版業僱員每月收入幅度的詳情分別載於附錄13和附錄14。

技術與非技術僱員

2.14 印刷業和出版業技術與非技術僱員的整體分布情況載於表2.19：

表 2.19： 印刷業和出版業
技術與非技術僱員整體分布情況

	技術僱員	非技術僱員	總計	技術僱員 所佔百分率
印刷業	17 690	5 144	22 834	77.5%
出版業	10 649	8 650	19 299	55.2%
總計	28 339	13 794	42 133	67.3%

僱主預期來年業務變動情況

2.15 調查顯示，約62.8%印刷業僱主及76.8%出版業僱主預期來年的業務仍能維持現狀甚或好轉。僱主的意見分布見表2.20及表2.21。

表 2.20： 印刷業僱主對來年業務狀況的意見

公司規模	業務狀況				總計
	較佳	不變	較差	未有註明	
1 – 9人	40	1 947	1 218	21	3 226
10 – 49人	37	276	132	4	449
50人或以上	8	35	9	7	59
總計	85	2 258	1 359	32	3 734
佔公司總數百分率	2.3%	60.5%	36.4%	0.9%	100%

表 2.21： 出版業僱主對來年業務狀況的意見

公司規模	業務狀況				
	較佳	不變	較差	未有註明	總計
1 – 9人	90	675	175	32	972
10 – 49人	8	115	44	7	181
50人或以上	9	35	8	15	67
總計	107	825	227	54	1 213
佔公司總數百分率	8.8%	68.0%	18.7%	4.5%	100%

派駐港外工作的印刷業僱員人數

2.16 據僱主填報，調查進行前12個月內，獲派駐香港以外地方工作超過六個月的僱員人數如下：

表 2.22： 派駐港外工作的印刷業僱員人數

技能等級	僱員人數	同一技能等級 僱員總數	佔同一技能等級 僱員總數百分率
技師／管理	183	1 410	13.0%
技術員／督導	183	7 315	2.5%
技工	2	7 771	0.03%
總計	368	16 496	2.2%

在中國內地設有廠房的出版業機構數目

2.17 調查顯示，出版業1 213間本地公司中，75間在中國內地設有廠房，共聘用391名當地僱員，當中並不包括香港居民。各技能等級的內地僱員分布情況如下：

表 2.23： 出版業內地僱員人數

技能等級	內地僱員人數	在港僱員人數
經理	55	1 709
主任	138	2 552
技術人員	198	6 388
總計	391	10 649

印刷業僱員晉升人數

2.18 調查顯示，79名印刷業僱員獲晉升，分布情況如下：

表 2.24： 印刷業僱員晉升人數

門類	技能等級			總計
	技師／管理	技術員／督導	技工	
1. 報紙印刷	-	-	-	-
2. 商業印刷	17	19	31	67
3. 其他印刷及有關活動	-	4	-	4
4. 容器、紙盒及紙板盒	1	-	-	1
5. 印務代理	-	-	-	-
6. 選定機構	3	4	-	7
總計	21	27	31	79

出版業僱員晉升人數

2.19 調查顯示，78名出版業僱員獲晉升，分布情況如下：

表 2.25： 出版業僱員晉升人數

門類 \ 技能等級	經理	主任	技術人員	總計
1. 報紙出版	3	18	-	21
2. 出版及有關活動	15	27	-	42
3. 書報及期刊批發	-	1	-	1
4. 書報及期刊進出口貿易	6	7	0	13
5. 選定機構	-	-	1	1
總計	24	53	1	78

印刷業僱主所遇主要招聘困難

2.20 印刷業僱主報稱招聘時遇到的主要困難如下：

表 2.26： 遇到招聘困難的印刷公司數目

門類	遇到招聘困難的公司數目	未有招聘困難的公司數目	過去12個月並未進行招聘的公司數目
1. 報紙印刷	1	-	3
2. 商業印刷	234	99	1 283
3. 其他印刷及有關活動	15	23	217
4. 容器、紙盒及紙板盒	12	-	120
5. 印務代理	18	60	1 314
6. 選定機構	9	5	36
總計	289	187	2 973

表 2.27： 印刷業遇到的主要招聘困難

原因 技能等級	應徵者並無 相關技能/ 知識	應徵者缺乏 相關經驗	應徵者 未具有 相關學歷	應徵者 語文能力 水平欠佳	應徵者認為 薪酬欠吸引	應徵者不願 意長時間 輪班工作	應徵者不願 意到中國 內地工作	其他	總計
技師/管理	3	8	1	1	4	-	1	-	18
技術員/ 督導	53	55	1	2	28	4	2	46	191
技工	125	128	-	-	127	28	-	47	455
總計	181	191	2	3	159	32	3	93	664

出版業僱主所遇主要招聘困難

2.21 出版業僱主報稱招聘時遇到的主要困難如下：

表 2.28： 遇到招聘困難的出版公司數目

門類	遇到招聘困難的 公司數目	未有招聘困難的 公司數目	過去12個月並未 進行招聘的公司 數目
1. 報紙出版	4	15	12
2. 出版及有關活動	164	75	691
3. 書報及期刊批發	3	-	55
4. 書報及期刊進出口貿易	8	3	101
5. 選定機構	-	5	12
總計	179	98	871

表 2.29： 出版業遇到的主要招聘困難

原因 技能等級	應徵者並無 相關技能/ 知識	應徵者缺乏 相關經驗	應徵者 未具有 相關學歷	應徵者 語文能力 水平欠佳	應徵者認為 薪酬欠吸引	應徵者不願 意長時間 輪班工作	應徵者不願 意到中國 內地工作	其他	總計
經理	4	4	-	2	-	-	-	2	12
主任	67	80	1	3	13	1	-	2	167
技術人員	96	68	3	1	34	3	1	6	212
總計	167	152	4	6	47	4	1	10	391

印刷業僱員所需培訓

2.22 為迎合各方面的轉變，在未來12個月，印刷業僱員最需要加強的首三項重要技能／知識範疇如下：

表 2.30： 印刷業僱員所需首三項重要培訓範疇

技能等級	需加強的首三項重要技能／知識	
	排名	技能／知識
技師／管理	1	經銷管理
	2	製作管理
	3	客戶服務
技術員／督導	1	客戶服務
	2	印前技術
	3	製作管理
技工	1	印刷技術
	2	印前技術
	3	製作管理／品質管理

出版業僱員所需培訓

2.23 為迎合各方面的轉變，在未來12個月，出版業僱員最需要加強的首三項重要技能／知識範疇如下：

表 2.31： 出版業僱員所需首三項重要培訓範疇

技能等級	需加強的首三項重要技能／知識	
	排名	技能／知識
經理	1	經銷管理
	2	製作管理
	3	媒體科技
主任	1	稿件設計
	2	媒體科技
	3	編輯
技術人員	1	媒體科技
	2	電腦圖像處理與網頁設計／稿件設計
	3	編輯

2.24 印刷業和出版業僱員所需加強的技能／知識分別詳載於附錄15及附錄16。

出版業－電子出版

2.25 調查顯示，出版業有512間機構從事電子出版業務，其中網上出版佔476間，出版資料光碟（CD-ROM）佔44間。此外，691間機構並無從事電子出版業務。從事電子出版工作的僱員詳情如下：

表 2.32： 從事電子出版的僱員人數

門類	機構數目		僱員人數
	網上出版	資料光碟	
1. 報紙出版	28	-	217
2. 出版及有關活動	433	42	1 147
3. 書報及期刊批發	-	-	-
4. 書報及期刊進出口貿易	2	-	1
5. 選定機構	13	2	88
總計	476	44	1 453

2.26 從附錄6可見，從事電子出版的1 453名僱員中，只有96人（包括26名電子出版經理及70名電子出版主任）於現職機構內單單從事電子業務，而其餘1 357人（1 453人－96人）則亦需負責其他出版活動。

第三章

結論

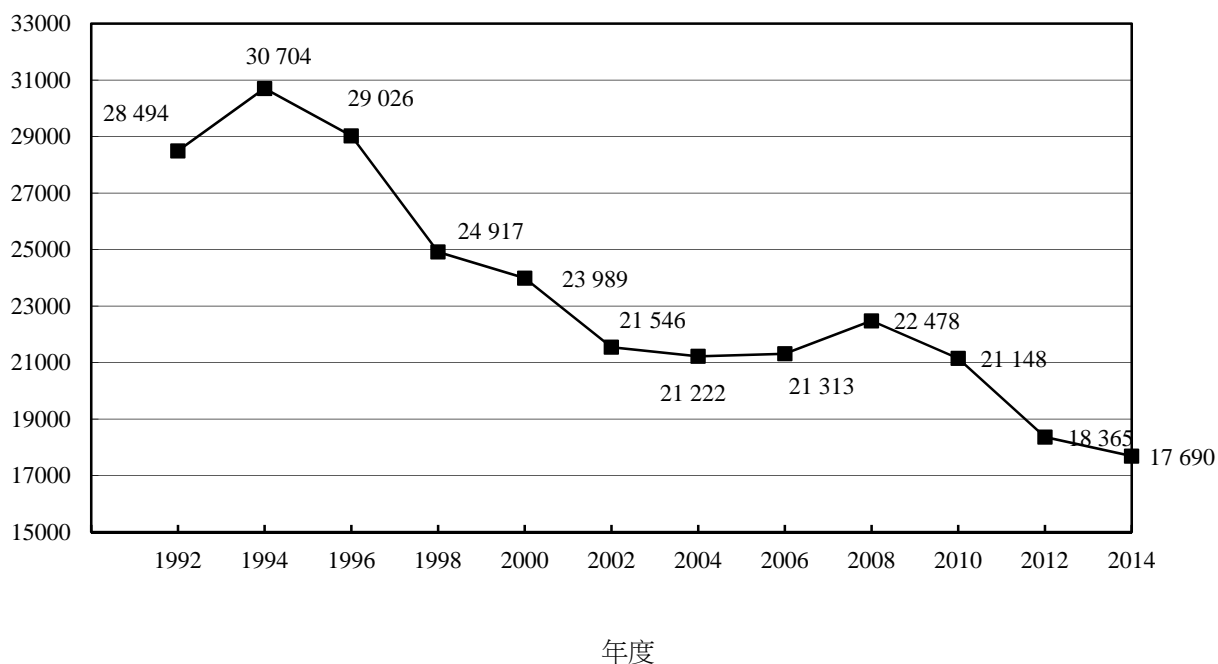
3.1 本會仔細研究過調查結果，認為有關數據大致能反映印刷及出版業在調查期間的聘員情況。

3.2 調查顯示印刷業的人力由上次2012年5月調查時的18 365人下降至17 690人，年度減幅為1.9%。另外，出版業的人力由上次調查時的9 900人上升至10 649人，年度增幅為3.7%。圖3.1及3.2為1992年至2014年間印刷業及出版業的人力狀況：

(A) 印刷業

圖 3.1： 印刷業人力狀況（1992年至2014年）

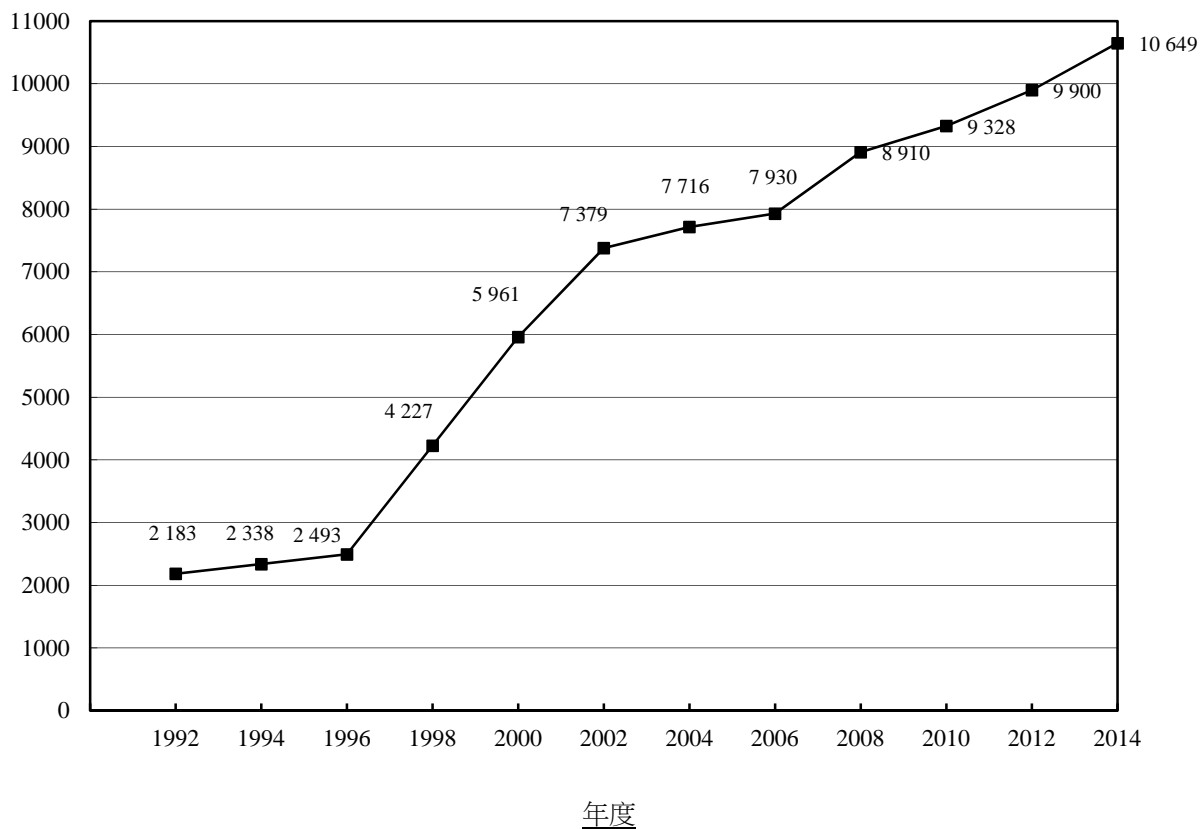
僱員人數



(B) 出版業

圖 3.2： 出版業人力狀況（1992年*至2014年）

僱員人數

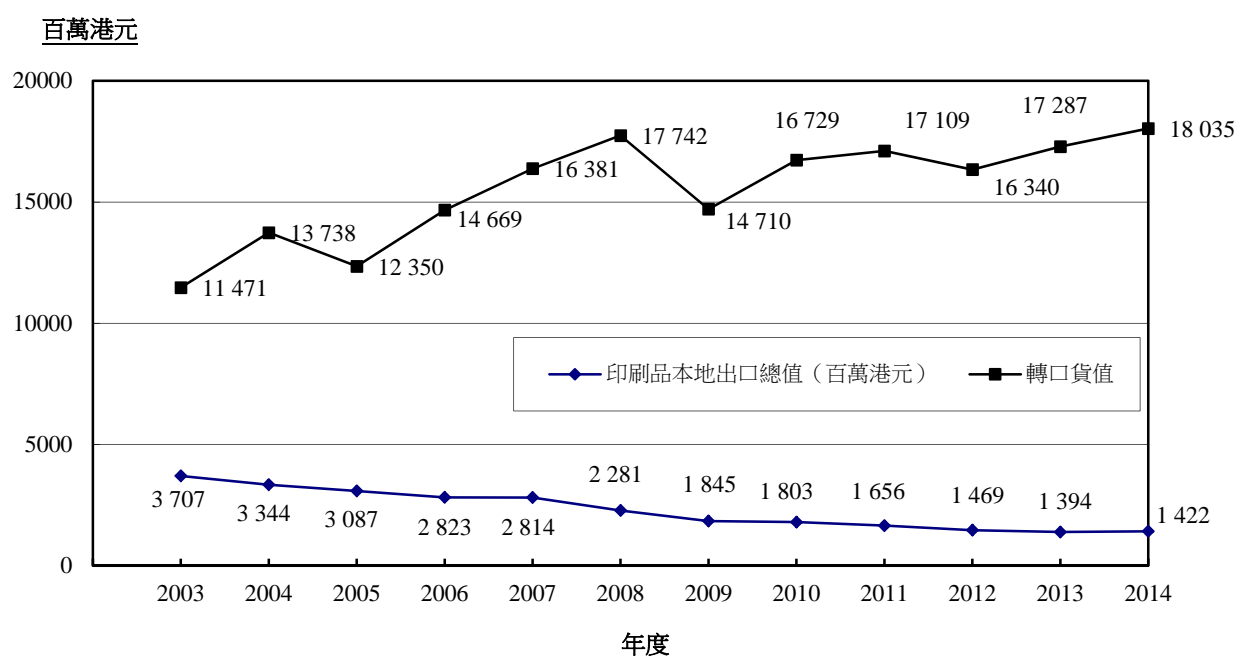


* 1992年至1996年人力調查由本會前身廣告、公共關係及出版業訓練委員會進行。自2000年起，人力調查覆蓋範圍已有所擴闊。

印刷業務表現

3.3 印刷品的本地出口總值在2000年錄得45.78億港元，2009年遞減至18.45億港元，2013年再減至13.94億港元。至於印刷品的轉口貨值，在2003年至2012年間則有波動，徘徊於114.71億港元（2003年）至177.42億港元（2008年）之間，2013年重拾升勢，至2014年升至180.35億港元。下圖3.3為2003年至2014年間印刷品的本地出口總值及表現。

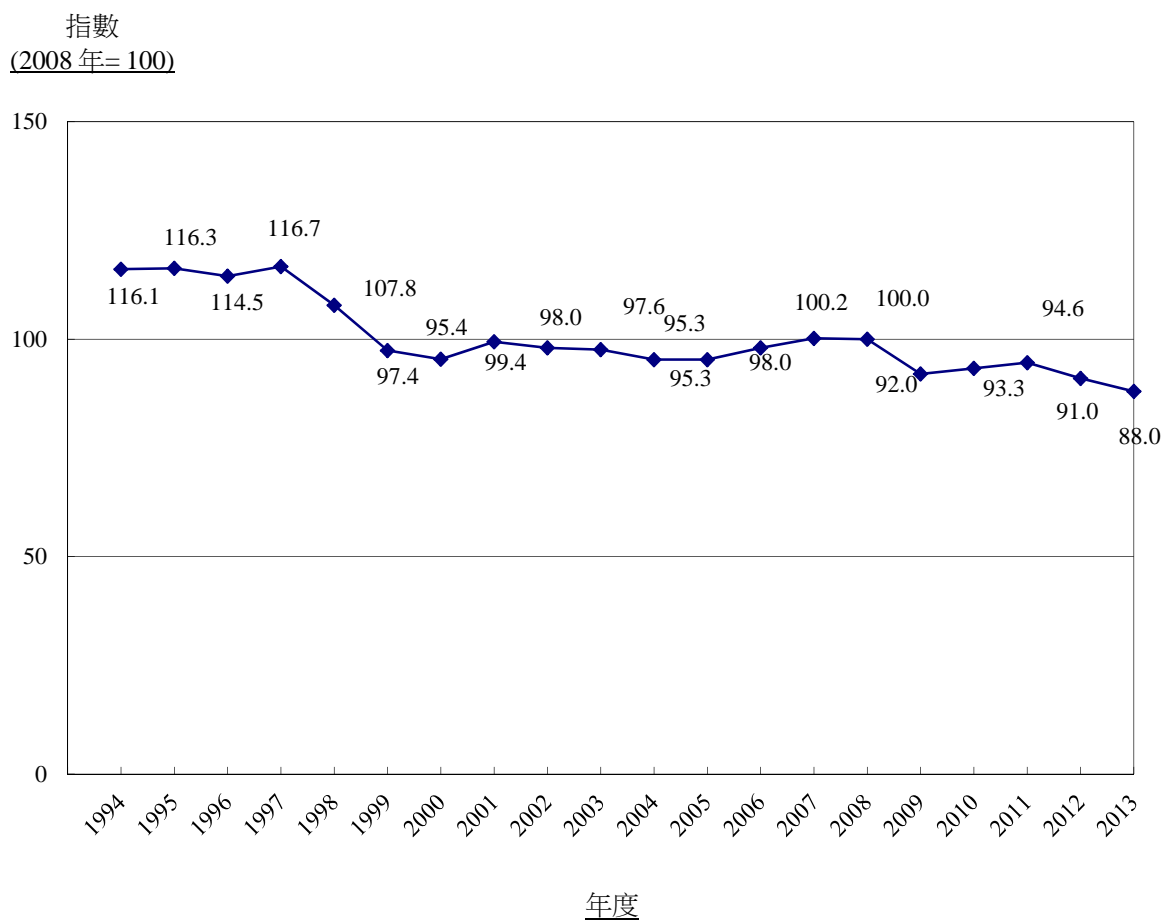
圖 3.3： 印刷品本地出口總值及轉口貨值
(2000年至2014年)



資料來源：政府統計處《香港貿易統計》

3.4 印刷業生產指數則由2008年（基準年）的100減至2013年的88，反映本地紙品及印刷品在過去幾年間的生產量下降。見下圖3.4：

圖 3.4： 紙品及印刷品—
工業生產指數



資料來源： 政府統計處

註： 「生產指數」計算實質本地生產量的變化，須撇除價格變動因素。由2008年第三季起，工業生產指數改以2008年為基準年。

3.5 第 3.3 及3.4 段的數據反映印刷繼續轉移到內地發展業務，情況大致上已告穩定。

各門類人力變化

(A) 印刷業

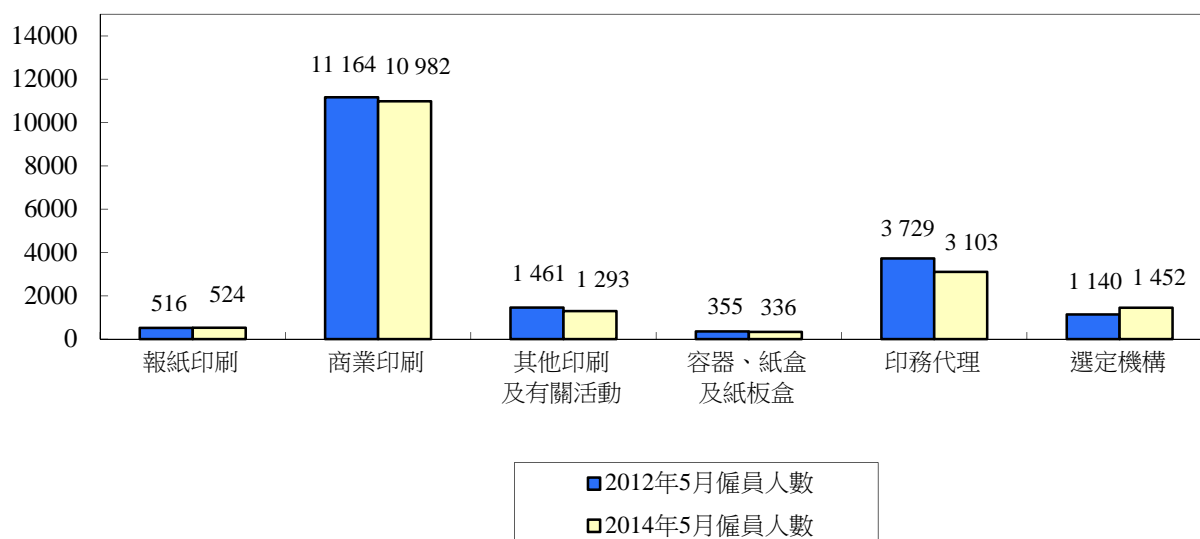
3.6 2012年5月至2014年5月間，印刷業各門類的人力變化見表3.1及圖3.5：

表3.1： 印刷業各門類人力變化
(2012年5月至2014年5月)

門類	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
1. 報紙印刷	516	524	+ 0.8%
2. 商業印刷	11 164	10 982	- 0.8%
3. 其他印刷及有關活動	1 461	1 293	- 5.9%
4. 容器、紙盒及紙板盒	355	336	- 2.7%
5. 印務代理	3 729	3 103	- 8.8%
6. 選定機構	1 140	1 452	+ 12.9%
總計	18 365	17 690	- 1.9%

圖 3.5： 印刷業各門類人力變化
(2012年5月至2014年5月)

僱員人數



門類

3.7 調查顯示門類六（選定機構）的技術僱員按年增長12.9%，由2012年5月的1 140人上升至2014年5月的1 452人。是因為有更多印製金屬罐的公司添置了數碼印刷設施，僱用更多技術僱員，特別是相關業務的技工級人手需求更大。

3.8 自從上次2012年5月人力調查，印刷業艱苦經營。印刷品的本地出口總值由2009年的18.45億港元下跌至2014年的14.22億港元（見第3.3段）。2014年5月，門類二至五的機構數目為4 036間，較2012年5月少167間；印刷業僱用的人手亦因此減少，該四個門類機構人手按年減幅由0.8% 至 8.8% 不等。

3.9 香港享有新聞自由，電訊網絡發達快捷，多家國際出版商及新聞通訊社在香港設立辦事處。而且，電子出版業務持續增長，讀者可選用智能電子裝置在網上閱讀報章、雜誌書刊及其他資訊。閱讀或購買印刷書報的讀者過去幾年均有下降。因此，亦令印刷業相關門類的人手減少。

(B) 出版業

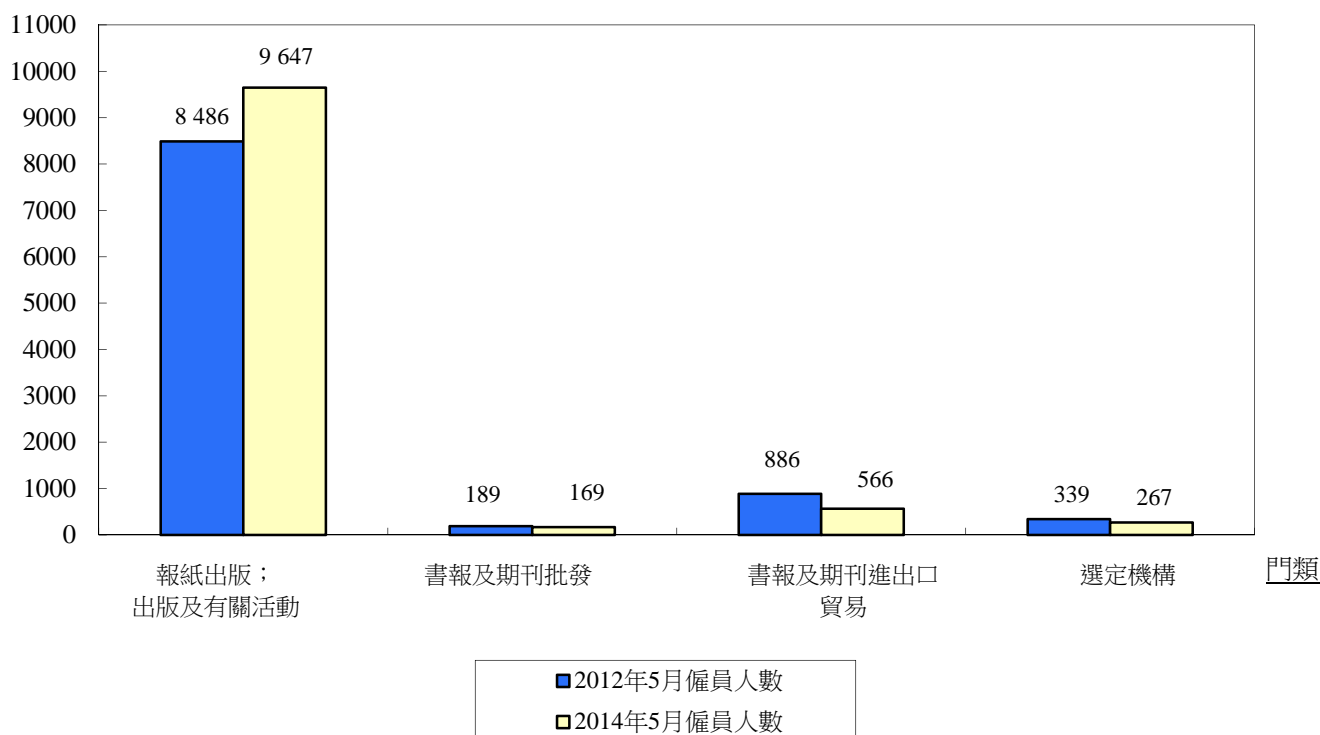
3.10 出版業各門類在2012年5月至2014年5月間的人力變化見表3.2及圖3.6：

表 3.2： 出版業各門類人力變化
(2012年5月至2014年5月)

門類	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
1 及 2. 報紙出版；出版及有關活動	8 486	9 647	+ 6.6%
3. 書報及期刊批發	189	169	- 5.4%
4. 書報及期刊進出口貿易	886	566	- 20.1%
5. 選定機構	339	267	- 11.3%
總計	9 900	10 649	+ 3.7%

圖 3.6： 出版業各門類人力變化
(2012年5月至2014年5月)

僱員數目



3.11 2014年的人力調查首次加入門類一（報紙出版）的人力，不過，因為這門類機構的人力大多亦歸入之前的門類二（出版及有關活動），為此，建議2014年的調查將門類一的人力加入門類二之內，以便比較2014年與2012年的人力。調查結果顯示，合併計算的門類二（出版及有關活動）按年人力增長為6.6%，由2012年5月的8 486人增至2014年5月的9 647人。主要原因為這個門類的機構增加了74間，技術人員大增，經理級人手亦微增。另一方面，門類五（選定機構）數目減少了15間，由2012年的339人減至2014年的267人，按年減幅為11.3%，甚為明顯。至於門類三（書報及期刊批發），人手按年大減20.1%，由2012年189人減至2014年169人，讀者人數下降是其中原因。基於同樣原因，門類四（書報及期刊進山口貿易）的人力下降，由2012年339人減至2014年267人，按年減幅為5.4%。

印刷業各技能等級的人力變化

行業整體

3.12 調查顯示印刷業整體人力年度微降了1.9%。往年甚難聘請技術人手，而且因為添置更多自動化設施後，現有人手要兼顧更多職務。業內人力質素因此已有提升。2012年至2014年間印刷業按技能等級分析的人力轉變見表3.3：

表 3.3： 印刷業各職級人力變化
（2012年5月至2014年5月）

技能等級	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
技師／管理	1 243	1 410	+ 6.5%
技術員	7 962	7 315	- 4.2%
技工	7 891	7 771	- 0.8%
非技術人員	1 269	1 194	- 3.0%
總計	18 365	17 690	- 1.9%

技師／管理級

3.13 調查顯示技師／管理級的人力由2012年的1 243人增加至2014年的1 410人，按年增幅為 6.5%。人力變化細分情況見下表3.4：

表 3.4： 技師／管理級主要職務人力變化
(2012年5月至2014年5月)

主要職務	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
總經理	345	363	+ 2.6%
生產經理／廠務經理／ 品質經理	313	346	+ 5.1%
營業／客戶服務／ 市場推廣經理	526	650	+ 11.2%
採購經理	36	32	- 5.7%
資訊科技經理（印刷）	23	19	- 9.1%
總數	1 243	1 410	+ 6.5%

技術員級

3.14 自上次2012年調查以來，印刷業經歷另一艱難時期，技術員級人力各個主要職務人手均有削減。調查顯示，該職級的人力由2012年5月的7 962人下降至2014年5月的7 315人，人力情況細分見下表 3.5：

**表 3.5： 技術員級主要職務人力變化
(2012年5月至2014年5月)**

主要職務	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
印刷估價員／營業代表	4 459	4 435	- 0.3%
生產策劃員／生產管制員 ／品質管制員	616	600	- 1.3%
督導員／管理	507	400	- 11.2%
機電維修（印刷）技術員	325	297	- 4.4%
設計員／設計主任	475	470	- 0.5%
印前技術員及資訊科技 （印刷）技術員	1 238	908	- 14.4%
印刷物料採購員／控制員	156	103	- 18.7%
技術／產品（印刷）技術員	186	102	- 25.9%
總數	7 962	7 315	- 4.2%

技工及操作工級

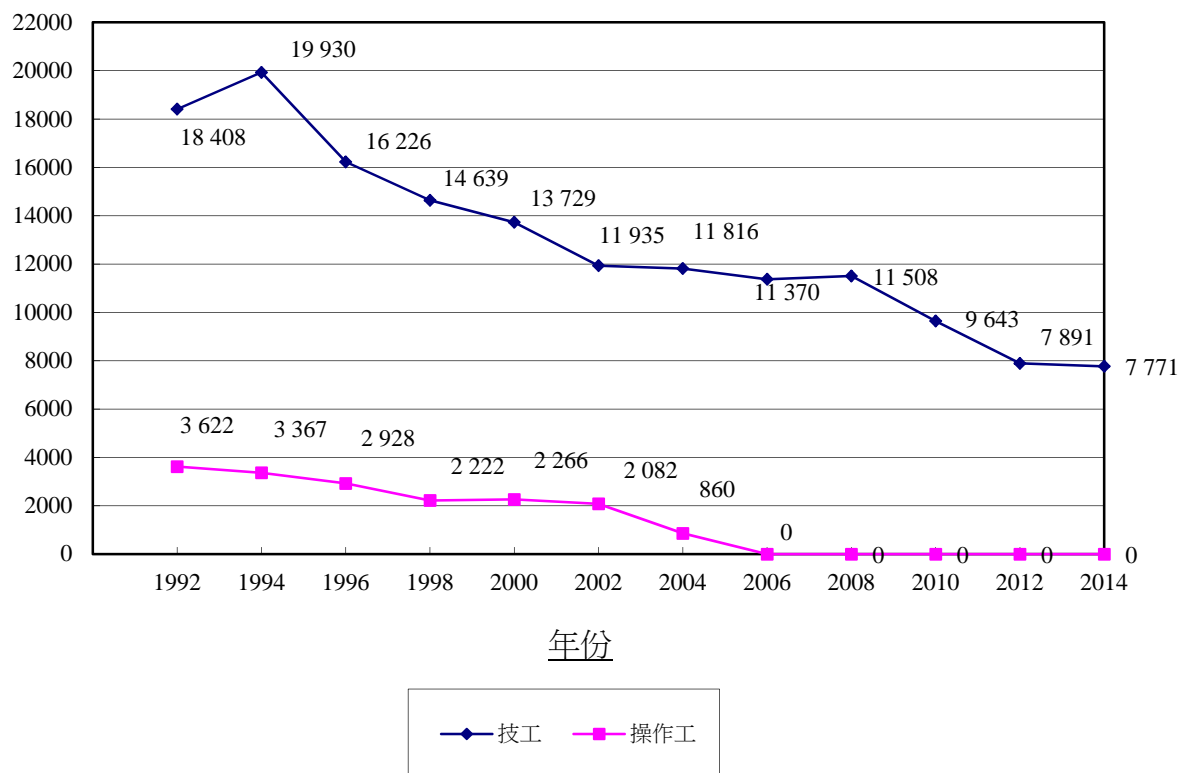
3.15 調查亦顯示兩年間的技工人力每年下降 0.8%。操作工級職務自2006年已從調查範圍刪除。人力變化情況詳見表3.6及圖3.7:

**表 3.6: 技工級主要職務人力變化
(2012年5月至2014年5月)**

主要職務	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
電子印前系統操作技工	626	606	- 1.6%
柯式版製作技工	848	602	- 15.7%
數碼印刷系統操作技工	421	699	+ 28.9%
單張給紙式柯式平版機印刷 技工	3 174	2 886	- 4.6%
捲筒給紙式柯式平版機印刷 技工	696	673	- 1.7%
其他印刷機械技工	399	489	+ 10.7%
裝訂技工	1 036	1 027	- 0.4%
啤盒工／造模工	214	294	+ 17.2%
包裝盒完成機械工	171	141	- 9.2%
其他印後機械技工	306	354	+ 7.6%
小計	7 891	7 771	- 0.8%

圖 3.7： 技工及操作工級人力變化
(1992年6月至2014年5月)

僱員人數



出版業各技能等級的人力變化

3.16 2012年至2014年期間出版業各技能等級的人力變化見表 3.7：

**表 3.7： 出版業各技能等級人力變化
(2012年5月至2014年5月)**

技能等級	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
經理	1 633	1 709	+2.3%
主任	3 356	2 552	-12.8%
技術人員	4 911	6 388	+14.1%
總計	9 900	10 649	+3.7%

經理級

3.17 調查顯示經理級人手的年度增長率為2.3%。人力變化詳見表 3.8：

**表 3.8： 經理級主要職務人力變化
(2012年5月至2014年5月)**

主要職務	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
董事經理／總經理／出版人	354	368	+ 2.0%
總編輯／主編	409	333	- 10.0%
設計總監／美術總監	142	172	+ 10.1%
# 製作總監／製作經理	83	109	+ 14.6%
市場總監／市場經理	200	268	+ 15.8%
營業總監／營業經理（報刊）	210	197	- 3.1%
營業總監／營業經理（書刊）	95	101	+ 3.1%
編輯經理	114	135	+ 8.8%
* 電子出版經理	26	26	0%
總計	1 633	1 709	+ 2.3%

職務性質與印刷業內主要職務「生產經理」相同。

* 此項為2012年5月新加之主要職務。

主任級

3.18 調查亦顯示主任級人手大幅下降，年度減幅為12.8%，詳見下表 3.9:

**表 3.9： 主任級主要職務人力變化
(2012年5月至2014年5月)**

主要職務	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
策劃編輯	193	151	- 11.5%
高級編輯	1 121	820	- 14.5%
設計師	570	446	- 11.5%
# 製作主任	125	151	+ 9.9%
營業主任	770	388	- 29.0%
市場／宣傳主任	202	286	+ 19.0%
客戶服務主任（書籍）	132	53	- 36.6%
發行主任（服刊）	99	187	+ 37.4%
* 電子出版主任	144	70	- 30.3%
總計	3 356	2 552	- 12.8%

職務性質與印刷業內主要職務「督導員／管理員」相同。

* 此項為2012年5月新加之主要職務。

技術人員級

3.19 調查顯示過去兩年技術人員級的人力大幅上升，年度增長率為14.1%。人力變化詳見下表3.10：

表 3.10： 技術人員級主要職務人力變化
(2012年5月至2014年5月)

主要職務	2012年5月 僱員人數	2014年5月 僱員人數	按年變化
助理編輯／稿件編輯／ 美術編輯／校對員	1 569	2 719	+ 31.6%
美術設計員／插圖員	582	876	+ 22.7%
△ 桌面排版操作員	411	712	+ 31.6%
# 製作助理	297	287	- 1.7%
營業作表／營業主任	1 588	1 120	- 16.0%
市務助理／宣傳助理	445	656	+ 21.4%
其他出版業有關職位 (電腦程式編寫員及設計／ 繪圖員)	19	18	- 2.7%
總計	4 911	6 388	+ 14.1%

與印刷業內技工級職務性質相同。

△ 職務性質與印刷業內主要職務「電子印前系統操作技工」相同。

人力變化

3.20 過去兩年印刷業及出版業內僱員人數變化的分析如下：

(A) 印刷業

- (a) 自上次2012年5月的人力調查後，印刷業再度經歷艱難時期。2014年調查顯示，業內機構總數較2012年5月時減少162間。調查亦發現，整體而言，技師／管理級的人力按年增加6.5%，而技術員／督導級及技工級的人力則按年分別減少4.2%及0.7%；
- (b) 與往常一樣，印刷業普遍較難聘請足夠的技術人手。為應付此情況及業內機構使用自動化設施的趨勢，從業員需負擔更多工作。業內的經理（技師／管理級）需要分擔部分技術員／督導級的職務。因此，技術人力的質素及生產力普遍有所提升；

- (c) 部分機構採用互聯網科技，於中國內地進行印前工作，令資訊科技經理（技師／管理級）、資訊科技技術員（技術員／督導級）及電子印前系統操作技工（技工級）的人力按年分別減少9.1%、14.4%及1.6%；
- (d) 配合改善服務及開拓商機的需要，業內的管理級人力普遍增加，惟採購經理及資訊科技經理（印刷）則例外；
- (e) 調查顯示，愈來愈多機構增加數碼印刷業務，同時減少柯式印刷工作，數碼印刷系統操作技工的人力因而上升，而從事柯式印刷相關工作的人員則減少。另一方面，由於市場對立體書及其他特製書籍的印製需求高企，令其他印刷機械技工和啤盒工／造模工的人力按年分別增加10.7%及17.2%。

(B) 出版業

- (a) 電子出版業務於過去兩年持續增長，吸引不少自由撰稿人及新公司加入。網上出版方興未艾。更多本地報章、地區甚至環球報章及主要雜誌均推出網上服務。是次調查顯示，2014年業內機構較2012年增加了57間。
- (b) 調查顯示，將門類一（報紙出版）及門類二（出版及有關活動）的人力合併計算後，經理級及技術人員級的人力按年分別增加3.6%及6.6%。這兩個門類的人力增長，抵銷了門類三、四、五內全部三個技能等級的人力流失。調查顯示，整體而言，經理級及技術人員級的人力按年分別增加2.3%及14.1%，主任級的人力則按年減少12.8%；
- (c) 基於(a)所載的原因，技術人員級的助理編輯／稿件編輯／美術編輯／校對員、美術設計員／插圖員及桌面排版操作員的人力按年分別大增31.6%、22.7%及31.6%；
- (d) 另一方面，調查顯示，業內520間從事電子出版業務的機構共僱有1 453人（見表 2.32）。與2012年的數據相比（273間機構，988名僱員），2014年從事電子出版的機構增加了247間，僱員亦增加了465人。然而，電子出版主任（主任級）的人力按年減少30.3%，電子出版經理（經理級）的人數則維持不變，反映這方面的職務已轉由其他相關主要職務的經理級及主任級人員擔任，例如電子出版經理及策劃編輯等；以及
- (e) 過去兩年，主任級的人力按年大跌12.8%。主要職務中的營業主任及客戶服務主任（書籍）的人力按年分別銳減29.0%及36.6%。營業主任的流動率高企，反映此類職務人員可輕易於其他行業物色工作。他們離職後，職務會由同級的發行主任、經理級的市場總監／市場經理以及

技術人員級的市務助理／宣傳助理分擔，因此這些職位的人力分別按年增加37.4%、21.4%及15.8%。

人力數字與本會預測比較

(A) 印刷業

3.21 表 3.11 將實際人力數字（僱員數目及職位空缺數目）與本會在2012年的預測作比較：

表 3.11： 2014年人力現況與2012年本會預測之比較

技能等級	2014年 實際人力數字	本會在2012年的 人力預測	人力預測與 實際數字比較
技師／管理	1 411	1 333	- 5.5%
技術員	7 391	8 481	+ 14.8%
技工	7 972	8 390	+5.2%

3.22 按年計算，調查顯示印刷業技師／管理級人力增幅為 6.5%，技術員級人力減幅為4.2%，技工級人力減幅為0.8%。技師／管理級以及技工級的實際人力與本會2012年時所預測相近。至於技術員級實際與預測的人力差距較大，可能是業內對門類三（其他印刷及有關活動）及門類五（印務代理）的人力需求較少所致。

(B) 出版業

3.23 表3.12為人力現況（僱員數目及職位空缺數目）與本會2012年預測之比較：

表 3.12： 2014年人力現況與2012年本會預測之比較

技能等級	2014年 實際人力數字	本會在2012年的 人力預測	人力預測與 實際數字比較
經理	1 712	1 847	+7.9%
主任	2 626	3 579	+ 36.3%
技術人員	6 492	5 392	- 16.9%

3.24 本會2012年所預測的技術人員數目遠較實際人力為低，經理級以及主任級人力則較實際為高。技術人員級的人力差距甚大，主要由於新設立的門類一（報紙出版）以及門類二（出版及有關活動）對這方面的人手需求較高；而主任級實際與預測人力

差距大，是因行業整體對中層管理人員的需求減少，尤其見於營業主任及客戶服務主任這兩種職務；經理級實際人力則接近本會預測。

業務展望

概述

3.25 香港是全球主要的印刷中心之一。然而，人民幣不斷升值、工資上漲、稅項增加，以及油價、利率及貨幣反覆上落令能源及原材料價格波動，印刷業及出版業的經營面對重重挑戰；珠江三角洲勞工短缺、內地實施《勞動合同法》及加工貿易政策更構成另一項隱憂，影響印刷業的營運開支。另一方面，自從2012年5月實施第七階段《內地與香港關於建立更緊密經貿關係的安排》（CEPA VII）以來，香港一直享受進口貨品零關稅優惠；中央政府更於2013年3月公布「十二五」規劃，加上香港與內地於2012年6月29日簽訂CEPA補充協議九，將會繼續為本港企業及印刷出版行業提供大量商機。

3.26 中國內地2014年的經濟增幅為7.4%，是24年來最低，顯示經濟增長步伐放緩，亦反映全球經濟情況。美國方面，由於失業率下降，消費信心回升，經濟改善，聯邦儲備局於2014年10月底結束其大型債券購買計劃。美國經濟增長亦令美元兌其他貨幣匯率高企。歐洲方面，由於經濟增長疲弱，失業率高企，消費物價指數處於負水平，歐洲中央銀行遂於2015年1月推出購買債券刺激經濟計劃。為了對抗經濟低迷及防止歐元區的經濟步向通縮，歐洲中央銀行將會每月注資6,000億歐元改善經濟狀況，至2016年9月底為止。整體而言，儘管中國內地2014年的經濟增幅低，預期仍會繼續增長，而且預測香港經濟增長亦會持續。上述各種舉措於未來幾年將對印刷業及出版業產生一定程度的影響。

3.27 過去幾年，環保概念愈趨普及，加上要符合安全法例，令中國及其他國家收緊了環境法，頒布有關貿易措施，令本港公司承受巨大壓力。各類貿易措施包括《美國消費品安全改進法案2008》[CPSIA]及《歐盟玩具安全指令2009/48/EC》。預料未來本港公司仍需承受這方面的壓力。業務方面，除了中國內地企業，本港公司亦一直面對其亞洲廠家的強大競爭對手。

3.28 香港電訊網絡發達，是印刷業及出版業的重要資產，有利數碼印刷及電子出版持續發展。透過衛星通訊，國際出版社可以電子方式將文本、相片及高質素的影像傳送至香港的辦事處，以供印行亞洲版。另一方面，生產工序走向自動化或電腦化，印刷公司要增聘熟識資訊科技的員工，管理生產過程。本會認為，印刷及出版公司會營運更多跨媒體、多媒體以至超媒體業務，所以對於能掌握資訊科技及相關行業知識的人手，會需求甚殷。

3.29 本港及各地顧客愈趨要求優質且價格相宜的服務；故此，提供既靈活又具創意的服務，滿足顧客要求，是印刷業及出版業公司所要面對的挑戰。

印刷業

3.30 本會相信，面對上述的形勢和機遇，本地印刷業有能力應付未來的挑戰，並從中受惠。中國內地已成為世界一大印刷市場，角色吃重，業務將持續增長。本會亦相信，內地龐大的印刷市場會為香港的公司帶來雄厚商機。面對未來各項競爭和挑戰，預計更多僱主會分散業務，由生產轉為貿易，並由香港轉往中國內地發展。除了與客戶保持良好溝通外，亦須面向不同類型的顧客要求而生產多元化的印刷物料。數碼印刷持續發展，需要更多技術人才具備資訊科技的相關技能。所以，為配合未來的人力需求，必須有幹練的技師級及技術員級別人才；另一方面，僱主亦會在內地僱用更多技工及操作工。

3.31 印刷業是本港製造業龍頭之一，亦是香港經濟的一大支柱工業。現時，愈來愈多海外客戶希望縮短生產周轉期和交貨時間，以賺取最大利潤。本地印刷公司的獨特之處，在於有各式各樣的器材設施、交貨快、質優價廉，能應付急單要求等，相信可以取得更多海外顧客的訂單。另一方面，更多本地印刷公司為顧客提供由初始概念、設計、生產到交貨的「全方位解決方案服務」，將可進一步提升競爭力和市佔率。

3.32 數碼印刷雖然仍在摸索階段，但本會預料未來年間這方面的業務會繼續增長，應用範疇會顯著增加。網上印刷和按需印刷將成為風尚，世界各地客戶現在均可直接或透過中介軟件服務商，傳送單份或大量訂單予能提供按件數碼印刷方案及服務的印刷公司。這是一個龐大市場，香港的印刷公司在使用傳統的印刷設備之外，亦應裝備好迎接前面的商機和挑戰。另一方面，市場對柯式印刷仍有需求，業務發展穩定。

3.33 電子出版日漸普及，會繼續對印刷業構成威脅。不少過去以印刷本出現的刊物已轉成電子版，方便參閱，而每次可訂印少數量，待有需要時加印。整體來說，電子印刷可靈活應對市場需要，實現環保概念。電子版的業務章程及教科書日見普及，便是鮮明例子。面對此等重大挑戰，香港的印刷商必須精簡和分散業務，使公司更有效率，業務更勝從前。印刷商必須採用國際印刷標準化工序，才可滿足客戶要求；同時亦要發展更多具備增值和成本效益的產品／服務，以提升競爭力。

3.34 美侖美奐的書刊封面和產品包裝繼續成為市場趨勢，預計包裝印刷會持續增長，智能包裝需求尤其大，能支持傳統印刷業務發展。另一方面，雖然數碼印刷增長快速，但市場對柯式印刷仍有大量需求。在可見未來，柯式印刷和數碼印刷兩者將互補優勢，而非彼此競爭。

出版業

3.35 香港是國際城市且接近中國內地，是亞太區內的出版中心。香港的自由貿易政策，高度新聞自由，電訊網絡完善快捷，能吸引國際出版商以及新聞通訊社紛紛在香港設立辦事處。

3.36 因行業前景甚佳，入行門檻低，未來年間，電子出版將成為出版業的發展潮流，業務增長迅速。近年香港書展設有「電子書專區」或電子出版的主題展區，專供出

版社擺放機器售賣電子書，向讀者推廣產品及服務。現時已有大批出版社成立，以捕捉商機，包括一般電子書、電子學習、電子教科書和電子漫畫等業務範疇。不過，電子出版仍在摸索階段，並未有一套固定的業務模式。本會鼓勵本地出版商與電訊商合作，以便把現有和新的書刊內容轉為電子出版格式，透過互聯網在指定網站或應用程式商店銷售。同時出版業界亦需要一個適合電子出版市場的經營模式。觀察上述形勢，加上市民一般仍保留閱讀印刷本的習慣，本會預計，出版業未來數年會穩步發展。

3.37 香港政府教育局於2012年成功推行《學校電子學習試驗計劃》，其後又在2014年6月推出《電子教科書市場開拓計劃》(EMADS)，旨在促進和鼓勵具潛力和有意編製電子教科書的開發商，在香港開發一個嶄新、健康、豐富而可持續的電子教科書市場。EMADS有意試行電子教科書質素評審和保證機制，以制定一份完備和適用於電子教科書的建議書目表。EMADS第一期的書目已於2014/15學年推出使用，第二期書目可於2016/17學年推出。同時，政府亦於2011年9月開始為《學校電子學習試驗計劃》進行一項三年期的研究，旨在參考國際經驗，改進香港電子學習的成效、推行方式和其他方面。此項計劃將為本港出版公司帶來鉅大商機。

3.38 本港出版業的市場仍然以學校教科書為主；此外，兒童書、立體書、其他如使用擴增實境技術等特色設計的書刊雜誌，亦成為另一吸引讀者的業務範疇。

未來技術發展

(A) 印刷業

3.39 數碼印刷 -- 由於具備個人化、可變數據印刷、按需印刷、電子攝影、噴墨式打印、納米印刷、在線系統印後加工及交貨快等特色 and 優點，因此將可為印刷業進一步擴闊業務範圍。此外，數碼印刷已走進日常生活，例如製作家庭圖冊、個人成長片段圖冊、難忘時刻記念相簿(如婚禮、生日派對、嬰兒出生、畢業禮等)等，可以小量和快速印刷。在最新的科技發展下，除了水和空氣，幾乎所有物料可以用作數碼印刷。雖然仍在摸索階段，但數碼印刷將成為一門增長快、利潤高的業務。

3.40 印刷標準化技術 – 近年發展迅速，已成為行業趨勢。劃一流程、步驟清晰，配合器材以快捷安全、高效益的方式生產優質產品，對印刷業十分重要，是業內機構必備的品質證明。不過，世界各地的出版商和印刷買家要求標準化技術，亦令印刷機構在這方面的壓力日增。不同國家採用的印刷標準認證系統不一，如國際標準化組織 (ISO TC130 Graphic Technology)、美國 IDEAlliance G7、瑞士 Ugra PSO 及德國 Fogra PSO 等。亦有修訂或新制訂的印刷標準，包括管制印刷品質的 ISO 12647和評估碳足跡的 ISO 16759。

3.41 環保印刷 -- 愈來愈備受重視，是印刷業另一個重要技術趨勢。在製版及印刷過程中盡量減用化學品、減少製造廢物、減排二氧化碳，是重要的業務目標。由於出版商和其他用家承諾會更注重環保和遵守綠色印刷標準，印刷公司須使用再造紙、合成紙、UV 油墨、用大豆和植物提煉的油墨、低揮發性的有機化合物 (VOC) 和不含化學物質的印版，有助提供健康清潔的印刷工作環境。

3.42 技術開發 -- 現今印刷業更為著力開發新科技和應用技術，拓展業務市場。創新科技如立體印刷、全像素技術、無線頻率識別（RFID）包裝技術、印刷電子、由印刷媒體演進至跨媒體及超媒體、擴增實境、功能印刷等。除了常見的印刷技術，可使用熨印與冷壓、金銀色印刷、金屬油墨及光亮油、特別塗面、特別紙張及物料，增值印刷技術將更趨普及。平張式與滾筒式大開度印刷具備更快速、質優及印製柔韌物料的優點，將成為另一項主要業務。了解以上最新的科技發展，業內公司應會更樂意採用新的業務方案和營運模式。

(B) 出版業

3.43 電子書 – 互聯網和數碼技術的強勢發展，再加上智能電話、平板電腦和其他流動通訊器材的普及，令近年出版業的工作流程產生劇變。開發中的應用程式和業務方案愈來愈多，為業界帶來更多商機。尤其在年輕一代，閱讀習慣開始轉變，電子書刊逐漸為讀者接受。現時年輕一代十分熱衷數碼書刊、漫畫、日本漫畫、連環圖等。數碼讀物內容變得更豐富，可以多媒體閱覽，對作家及出版商同樣重要。整體而言，網上學習將會為讀者受落。過去幾年，電子出版業務增長迅速，未來仍會繼續增長。

3.44 電子出版標準 / 格式 -- 為不同的電子書閱讀器所使用，如Open Web Platform）、EPUB3、HTML5等，但目前仍未有共同標準。另一方面，現有及新的數碼讀物可轉為不同標準 / 格式，方便用於各款電子書閱讀器及應用程式，將成為作者和出版商的一大資產。為留住讀者、擴展市場和吸引新讀者，出版業必須經常創新，這對網上出版業尤其重要。在線閱讀或網上小說 / 文學作品成為時尚，可讓作家與讀者透過互聯網彼此交流，漸為讀者歡迎。有些網上小說因大受讀者歡迎，利潤可觀，甚至可出版印刷本出售。部分著名小說與文學作品已取得版權拍成電影。不過，數碼經濟社會下，網上侵權事件仍然對作家和出版商形成威脅。政府將針對作者、出版商、服務供應商及代理的角色和利益關係，加大力度處理版權、法律與權益等議題，例如實施數碼內容管理（DCM）及數碼版權管理（DRM），將可妥善解決有關爭議。

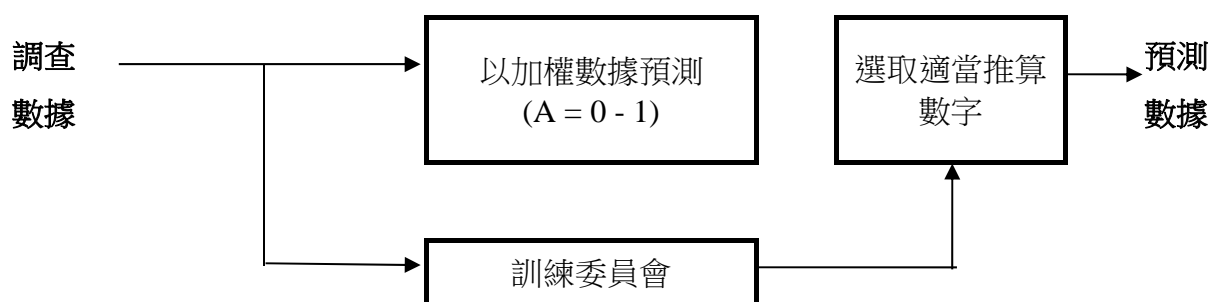
3.45 互聯網成為通用平台 -- 供傳送數碼內容和分享應用經驗。引入開放原碼技術，利便作家、出版商、零售商，更直接更獨立地參與電子出版業務。雲端電腦技術發展迅速，進一步促進未來的電子出版業務，包含多媒體互動元素、不同語言、格式兼容及視聽功能，更可發展至全媒體出版，將數碼內容以文字、圖像、相片、聲音、錄像和影片（包括立體影像）等媒體存取，然後透過互聯網及其他無線通訊網絡傳送。

未來人力預測

3.46 從人力趨勢、業務前景、僱主對未來人力的預測，本會相信印刷業的人力需求穩定，而出版業未來數年會有溫和增長。而且，數碼印刷和電子出版業務持續增長，帶動對幹練技師 / 管理人員、技術員和技工各級人力的需求，可維持印刷及出版業的發展。

3.47 考慮到上述因素，以及本調查中僱主對2015年的人力預測，本會採用了「調節過濾法」（AFM）推算印刷及出版業人力情況，以及在2015年至2017年所需的額外人手。

3.48 本會曾考慮使用「人力市場分析法」(LMA)來預測印刷業的人力發展趨勢。但礙於情況複雜，「人力市場分析法」並不適用於是次調查。本會因此沿用過往人力調查所使用的「調節過濾法」(AFM)，然後考慮了前述各段的種種外在因素、經濟趨勢、科技發展、從業人口模式、行業前景等，而選出最適當的推算數字。「調節過濾法」見下圖：



(A) 印刷業

3.49 2014年5月印刷業人力較2012年5月時的整體人力稍為減少，年度減幅為1.9%。本會審閱過印刷業過往及是次調查所得數據，包括2015年5月僱主的人力預測，並考慮到行業的未來發展，認為未來幾年業內對技師／管理級人手將繼續有需求。技術員／督導級及技工級人手方面，由於連續兩至三年均錄得下降，故認為按3%流失率培訓這兩個職級的人手可應付未來幾年的人力需求。本會亦觀察到數碼印刷業務正在增長，需求更多具備行業知識和相關技能的人員。

3.50 按上述估計，印刷業未來三年（2015年至2017年）需額外增加的技師／管理級、技術員／督導級、技工級人手如下：

表 3.13： 印刷業每年人手需求（2015年至2017年）

職級	平均每年需增人手			
	預測增長數目 (A)	流失數目 (B)	總計 (A) + (B)	(±10% 幅度)
技師／管理	40	44	84	75 - 93
技術員／督導	-	222	222	200 - 244
技工	-	240	240	216 - 264

人手需求按主要職務細分情況見附錄17。

(B) 出版業

3.51 本會亦使用「調節過濾法」(AFM)推算出版業的人力情況。本會觀察到2014年5月的業內人手較2012年5月時上升，增幅為3.7%。過去十年內，整體人力已連續五年（包括是次調查年度）錄得上升；然而，2014年錄得主任級人力12.8%的年度減幅，幅度甚大。另一方面，經理級及技術人員級人手錄得上升，每年分別為2.3%及14.1%。考慮到僱主預測至2015年5月的人力情況、業務前景以及出版業的未來發展，本會認為未來年間出版業會穩定向上。至於一直在增長的電子出版業務，本會認為經理級與技術人員級的人手將有增加。如往年人力調查，本會採用3%作為業內三個職級未來三年的人力流失率。主任級方面，因人手年度減幅大，本會認為按流失率培訓人手應會足夠。

3.52 按上述估計，出版業未來三年（2015年至2017年）需額外增加的經理級、主任級、技術人員級人手如下：

表 3.14： 出版業每年人手需求（2015年至2017年）

職級	平均每年需增人手			
	預測增長數目 (A)	流失數目 (B)	總計 (A) + (B)	(±10% 幅度)
經理	11	52	63	56 – 69
主任	-	79	79	71 – 87
技術人員	30	193	223	201 – 245

人手需求按主要職務細分情況見附錄18。

人力供求分析

3.53 預測印刷業 2015 年至 2017 年每年需要 75 至 93 名技師。連同附錄18所述，出版業同期約需要 3 至 4 名製作總監 / 經理，2015 年至 2017 年業界每年總共需要 78 至 97 名技師 / 管理級人員。

3.54 由於本地專上院校並無開辦印刷學位課程，所以目前的技師級人力供應不足。青年人如有志進修較高程度的印務課程，須往海外求學。因技師供應有限，僱主大都會擢升表現良好的技術員填補空缺，或直接聘用香港知專設計學院（HKDI）的高級文憑畢業生，或大學畢業生。

3.55 香港知專設計學院（HKDI）是本港唯一提供印刷學科高級文憑程度人力的院校，該校傳意設計及數碼媒體學系2015年至2017年預計畢業生人數如下：

<u>課程</u>	<u>估計畢業人數</u>		
	<u>2014/15</u>	<u>2015/16</u>	<u>2016/17</u>
<u>全日制</u>			
印刷及出版高級文憑（3年制）	5	0	-
印刷及出版高級文憑（2年制）	60	0	7
出版設計及印刷媒體高級文憑（2年制）	0	93	90
總計：	65	93	97

3.56 香港知專設計學院未來三年的畢業生將較推算業界所需人力為少。不過，其他學科的高級文憑畢業生部分或會投身印刷行業，擔任技術員級職務。

3.57 預測未來三年印刷業每年需要200至244人，連同填補流失人手在內。至於出版業，如附錄18所述同期需要4至5名製作主任。2015年至2017年業界每年總共需要204至249名技術員級人手。

3.58 卓越培訓發展中心（印刷業）是本港唯一開辦全日制印刷技術員課程的院校。根據該中心所提供的資料，未來的技術員課程畢業生人數將如下：

<u>課程</u>	<u>估計畢業人數</u>		
	<u>2014/15</u>	<u>2015/16</u>	<u>2016/17</u>
中專教育文憑（廣告、包裝及印刷） -- 學銜：技術員基礎證書（TFC）	1	0	0
中專教育文憑（廣告、包裝及印刷） -- 學銜：中專教育文憑（DVE）	78	70	91
中專教育文憑（平面圖像傳播） -- 學銜：中專教育文憑（DVE）	64	66	57
總計：	143	136	148

3.59 卓越培訓發展中心（印刷業）的畢業生總數，未足應付 2015 年至 2017 年的推算人力需求。不過，部分技術員級別職務可由參加學徒訓練的中學離校生及內部晉升的經驗技工來填補。本會認為有需要開辦短期課程（例如新技能提升計劃課程），以提升這些僱員的行業知識和技能，同時加強他們的督導技巧。印刷科技不斷進步，本會認為專業院校技術員課程畢業生受過適當訓練，擔任技術員級工作會更為勝任。

3.60 技工人力需求方面，未來三年沒有推算上的增長，但仍需有固定的人力供應，以維持本地印刷業務。預測 2015 年至 2017 年每年需要 216 至 264 名印刷技工；連同附錄 18 所述，出版業同期每年需要印刷技工（製作助理）9 至 11 人，則業界在 2015 年至 2017 年總共需要 225 至 275 名技工。

3.61 根據卓越培訓發展中心（印刷業）所提供的資料，未來的技工課程畢業生人數將如下：

課程	估計畢業人數		
	2014/15	2015/16	2016/17
中專教育文憑（廣告、包裝及印刷） -- 學銜：基本技術證書（BCC）	31	25	13
中專教育文憑（平面圖像傳播） -- 學銜：基本技術證書（BCC）	49	35	12
中專教育文憑（印刷媒體） -- 學銜：技工證書	0	0	0
總計：	80	60	25

3.62 卓越培訓發展中心（印刷業）的畢業生總數，遠遠未能應付技工職務的推算需求。不過，業界可透過再培訓方式，讓從事傳統職務的工人修讀技能提升課程，紓緩人手短缺的問題。

3.63 本會將在 2016 年進行另一次人力調查，檢討和更新業內的人力需求資料，並注視最新的科技發展，為從業員提供訓練。

第四章

建議

4.1 自上次2012年5月的人力調查後，印刷業及出版業再次面臨考驗。雖然如此，香港仍是全球主要的印刷及出版中心之一。印刷業及出版業的經營面對重重挑戰，人民幣不斷升值、工資上漲、稅項增加，以及油價、利率及貨幣反覆上落令能源及原材料價格波動；珠江三角洲勞工短缺及內地實施《勞動合同法》及加工貿易政策更構成另一項隱憂，影響營運開支。除了內地同行之外，本港印刷公司亦要面對亞洲區內其他多個生產商的激烈競爭。另一方面，自從2012年5月實施第七階段《內地與香港關於建立更緊密經貿關係的安排》（CEPA VII）以來，香港一直享受進口貨品零關稅優惠；中央政府更於2013年3月公布「十二五」規劃，加上香港與內地於2012年6月29日簽訂CEPA補充協議九，將會繼續為本港企業及印刷出版行業提供大量商機。再者，香港擁有優越的電訊網絡，作為印刷業及出版業的重要資產，有利數碼印刷及電子出版蓬勃發展。

4.2 全球經濟情況反覆波動。美國方面，由於經濟增長及就業情況改善，聯邦儲備局於2014年10月底結束其大型債券購買計劃。歐洲方面，由於經濟增長疲弱，失業率高企，消費物價指數處於負水平，歐洲中央銀行遂於2015年1月推出購買債券刺激經濟計劃。為了對抗經濟低迷及防止歐元區的經濟步向通縮，歐洲中央銀行將會每月注資6,000億歐元改善經濟狀況，至2016年9月底為止。上述各種舉措於未來幾年將對印刷業及出版業產生一定程度的影響。然而，內地改革和持續發展可為全球以至本港行業帶來更多商機。綜合上述原因，本會對印刷業今後的發展持審慎樂觀的看法，相信業界可繼續穩定發展；另亦認為出版業未來幾年會有溫和增長。本會建議僱主採取下列措施，以應付目前情況和未來挑戰：

- (i) 緊貼印刷及出版業務科技的最新發展，尤其是數碼印刷及電子出版方面；
- (ii) 實施標準化工序／服務，精簡及多元發展業務，令機構的運作更靈活，提升成效和效率；
- (iii) 發展更具創意、高增值、富成本效益、優質及環保的產品／服務（尤其是超媒體領域），以提升機構的競爭力；
- (iv) 透過適當培訓，進一步提升員工的整體技術水平和才能，尤其是資訊科技、設計及創意等技能，令機構更具實力和競爭力；
- (v) 繼續以最具成本效益的方法在特定產品市場開拓新業務，擴大市場佔有率；以及
- (vi) 維繫重點客戶，加強伙伴關係，並與潛在客戶建立合作關係。

4.3 至於員工的技術和能力水平，本會建議僱主除了考慮公司的個別培訓需求外，亦可參考附錄15及附錄16所載印刷業和出版業的「僱員所需訓練（各門類）」資料。在目前的情況下，僱主宜加強培訓力度，確保有足夠的幹練人才應對今後的挑戰和發展商機。此外，本會亦建議VTC及其他培訓機構密切留意以上的培訓需求，適時為印刷及出版業提供所需培訓服務。

4.4 本會認為，每兩年一次進行人力調查，對建立歷史數據作比較以及預測未來人力需求均有幫助，因此有需要繼續進行，密切監察印刷及出版業的人力和訓練情況，以便根據蒐集所得的資料，提出建議以配合業內訓練需要。

每年培訓人數

4.5 調查期間，印刷業及出版業分別有受訓者32名及63名。由於訓練新人一般需時長達三年，現時業內的培訓力度顯然不足以應付需要。

4.6 為確保技術人手供應充足，本會促請僱主參考下列數字制訂2015年至2017年的人力訓練計劃：

**表 4.1： 建議每年培訓人數
（2015年至2017年）**

技能等級	每年額外所需人手	
	印刷業	出版業
技師／管理／經理	84 (6.0%)	63 (3.7%)
技術員／督導／主任	222 (3.0%)	79 (3.1%)
技工／技術人員	240 (3.0%)	223 (3.5%)

（註：括弧內數字為每年受訓人手佔各技能等級人力的百分率）

印刷業及出版業各主要職務的詳細人力培訓數字分別載於附錄17和附錄18。

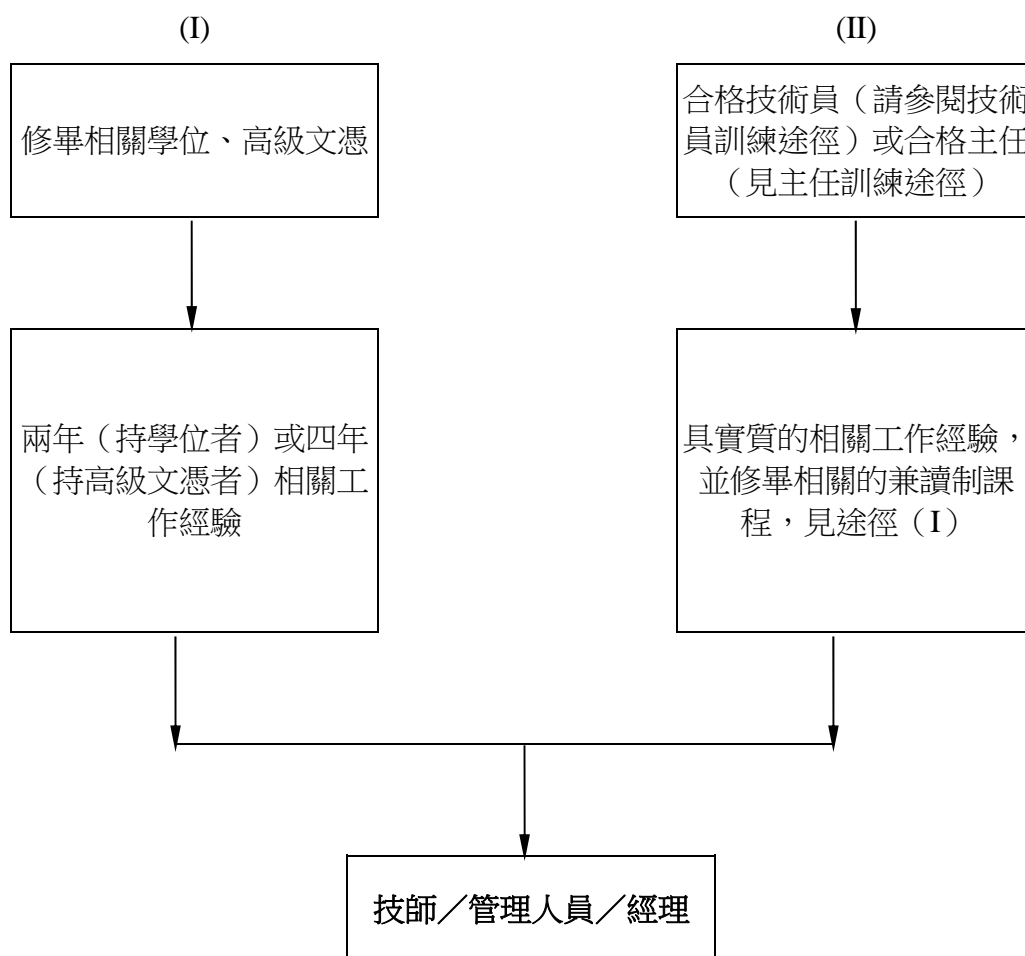
4.7 僱主進行機構人力策劃時，請參考第4.6段所載的建議人力培訓數字。2015年至2017年間，印刷業每年所需培訓的技師／管理人員約佔現時該級人力的6.0%，而所需的技術員／督導及技工則佔3.0%（流失率）。按照同一估算方法，出版業每年所需培訓的經理、主任和技術人員，分別約佔現時各級人力的3.7%、3.1%及3.5%。

4.8 技師／管理／經理級、技術員／督導／主任級，以及技工／技術人員級的建議訓練途徑載於下文各段。

技師／管理人員／經理訓練

4.9 印刷業的技師／管理人員與出版業的經理應持有相關大學學位、高級文憑或高級證書，另加數年相關工作經驗。

4.10 下圖展示訓練技師／管理／經理級人員的一般途徑：



4.11 本會建議僱主聘用大學學位或高級文憑畢業生為見習技師／見習管理人員／見習經理（見訓練途徑（I））；亦可透過訓練途徑（II）晉升表現出色的合格技術員／主任。

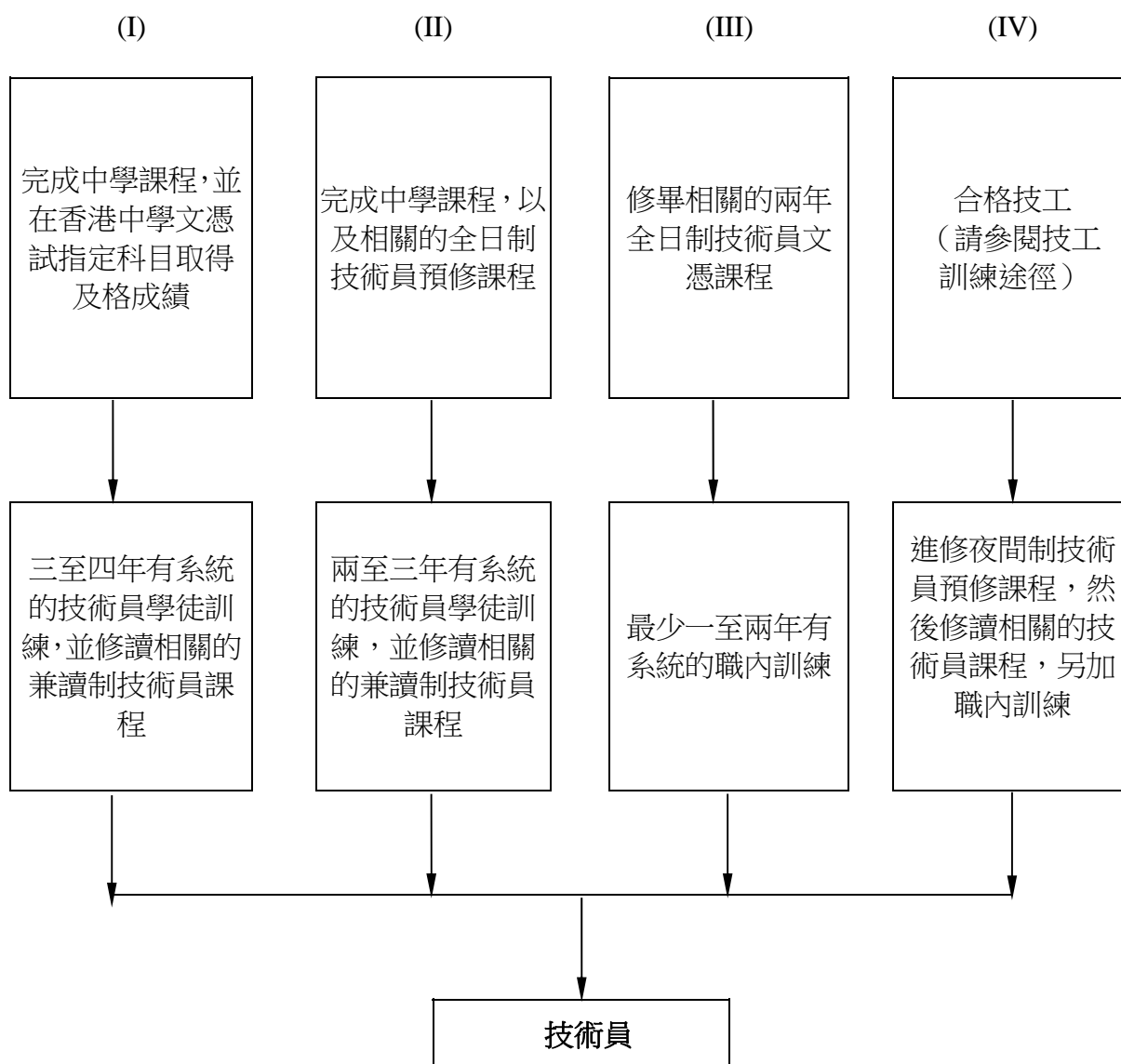
4.12 本會亦建議僱主資助屬下技術員／主任修讀夜間兼讀制學位、高級文憑或高級證書課程，以提升知識技能。

技術員／督導／主任訓練

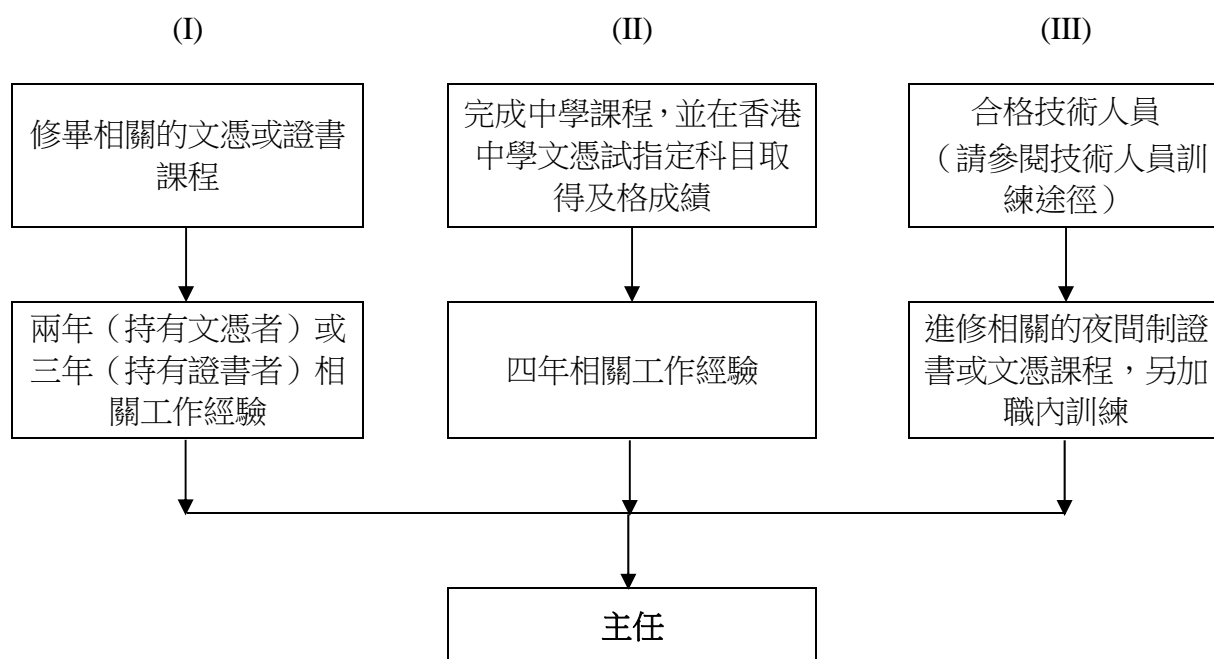
4.13 技術員或主任應能運用已確立的技術知識和程序，執行技術職務，包括督導技工或技術人員等。培訓內容應包括職內實務訓練和修讀相關的技術員證書課程，使他們能兼具實際經驗和理論知識。

4.14 訓練印刷業技術員及出版業主任的途徑建議如下：

(A) 印刷業－技術員



(B) 出版業—主任



4.15 VTC轄下的香港知專設計學院（HKDI）辦有印刷學科的高級文憑課程（全日制和兼讀制）及其他增修課程；而轄下另有卓越培訓發展中心（印刷業）提供一至三年全日制中專教育文憑（DVE）課程，為年輕人入行擔任技工級或技術員級職務或升學做好準備。

4.16 不少僱主聘用中學離校生為見習技術員／主任，讓他們與資深技術員或主任緊密合作，從職場中掌握實際技能，並同時到專上院校修讀相關的夜間制課程；部分僱主會聘用這些院校相關文憑或證書課程的畢業生。另有部分印刷業僱主則選擇聘用卓越培訓發展中心（印刷業）畢業生為技工／技術員學徒，一般訓練期為三年，全日制基本技術證書（BCC）或技術員基礎證書（TFC）課程畢業生可獲豁免首年學徒訓練。

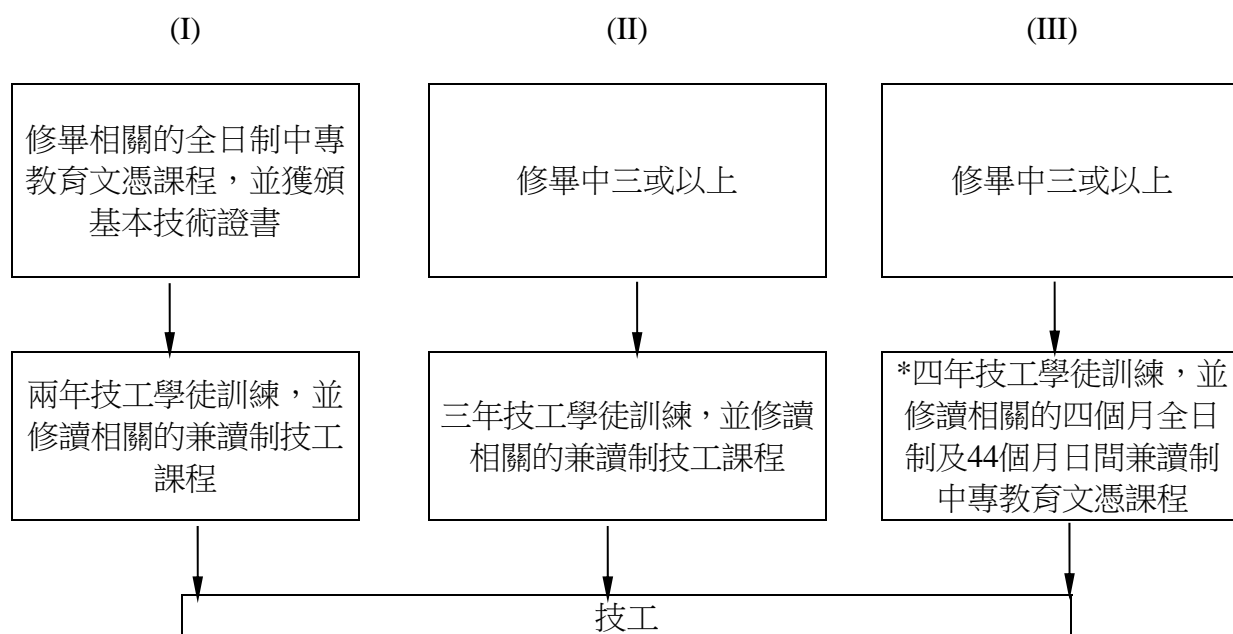
4.17 本會籲請印刷業及出版業僱主聘用卓越培訓發展中心（印刷業）及香港知專設計學院畢業生，並資助他們進修兼讀制課程，以增進知識技能。

技工／技術人員訓練

4.18 技工／技術人員是指能運用技能以擔任多類相關職務的人員；除了實務技能，亦須具備相關理論知識，以適應科技演進。

4.19 建議訓練途徑如下：

(A) 印刷業－技工



* 配合2014年推出的印刷業「職」學創前路先導計劃，學員需接受四年技工學徒訓練及修讀日間兼讀制中專教育文憑課程（印刷媒體）。

備註：

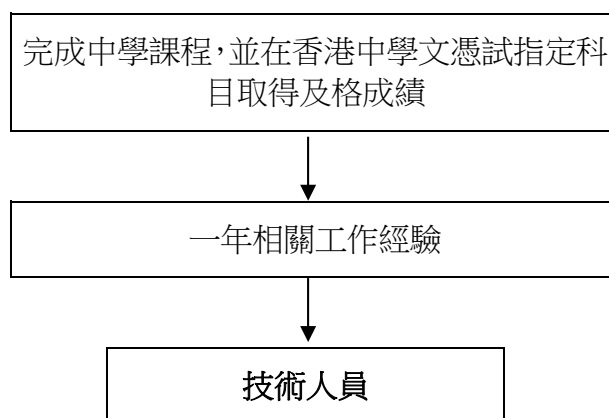
VTC 推出「職」學創前路先導計劃，結合有系統的職業教育和在職培訓，提供清晰的進修路徑，為人力需求殷切的行業吸納人才。

政府和參與行業會為計劃的學員提供津貼、職學金和特定薪酬，讓年輕人學習專業知識及技術的同時，獲取穩定收入，發展理想事業。

「職」學創前路先導計劃的培訓模式，因應不同行業的需要和運作度身訂造；除課堂學習外，學員亦會於受僱機構接受在職培訓。畢業學員日後可銜接更高學歷課程，在進修及事業上拾級而上，向專業路邁進。

(B) 出版業－技術人員

(A) 出版業－技術人員



4.20 VTC 轄下的卓越培訓發展中心（印刷業）辦有基本技術證書課程，現已革新及歸入為中專教育文憑課程（印刷媒體）。修讀中專教育文憑課程（印刷媒體）的學生，如順利修畢基本技術證書課程的168個學分（包括930小時行業單元及210小時通用單元），將獲頒授基本技術證書（BCC）學銜。

4.21 2014年，中專教育文憑課程（印刷媒體）增設技工證書學銜。學生如順利修畢技工課程的160個學分（包括690小時行業單元及240小時通用單元），將獲頒授技工證書（CC）學銜。

印刷學科基本技術證書課程

4.22 在中專教育文憑課程範疇之下，卓越培訓發展中心（印刷業）開辦多項全日制課程，可讓學生選擇基本技術證書為結業學歷。這類課程包括實務訓練、行業知識及通識教育，適合職業志向較強的青年人，幫助他們入行。

4.23 取得基本技術證書學歷畢業後，可投身業內加入第二年技工學徒訓練，兩年後滿師。本會促請僱主聘用這類畢業生為學徒，因訓練期較短，而且他們亦具備基本的行業技能，入職後便可立即投入工作。

4.24 卓越培訓發展中心（印刷業）開辦的基本技術證書課程列載於第4.32段。

印刷學科技工證書課程

4.25 為了促進印刷業的發展，卓越培訓發展中心（印刷業）配合印刷業「職」學創前路先導計劃的「4+44模式」，於2014/15學年開辦日間兼讀制技工證書課程。中三學生可選擇參加此項職學計劃，於完成首四個月的全日制實務培訓後，可立即投身印刷業工作。在首四個月內，學生主要學習行業專門知識及接受工場培訓，以便掌握業內基本工作技能。在其後的44個月，學生將成為正式技工學徒，一邊於職場實習，一邊繼續以日間兼讀制形式進修，完成中專教育文憑課程技工證書學銜的餘下單元。

4.26 卓越培訓發展中心（印刷業）開辦的技工證書課程列載於第4.32段。

新技能提升計劃

4.27 政府現推行新的技能提升計劃（SUS），以協助低學歷、低技術／傳統技術僱員提升就業能力。合資格學員可申請學費豁免或資助。合適的培訓機構可競投開辦印刷業技能提升計劃課程。自2001年9月推行以來，已有逾11 600名學員修讀過印刷業技能提升計劃課程。現時為業內技工開辦的技能提升課程列載於附錄19。

4.28 本會籲請僱主充分利用兼讀制技能提升課程，增強僱員的實力。

印刷業技能測驗

4.29 VTC已核准由屬下訓練委員會推行一項自願參加性質的技能測驗及證書頒發制度，目的如下：

- (a) 協助業界選聘合適的技術人才；
- (b) 協助從業人士取得認可資格（尤其未受過正規訓練的人士）；
- (c) 提高技術人員的地位；
- (d) 確立技術人員應有的技能水平；以及
- (e) 設立技能等級，使技術人員有晉升機會。

4.30 本會負責為印刷業僱員推行技能測驗，現時辦有柯式平版機印刷技工技能測驗。為配合印刷業的最新發展，本會擬為數碼印刷推出專業能力評估測試。

4.31 本會籲請僱主鼓勵屬下技工級僱員參加技能測驗，讓他們的從業地位得到正式認可。

卓越培訓發展中心（印刷業）

4.32 本會亦負責對卓越培訓發展中心（印刷業）的運作提供意見。現時該中心所開辦的全日制課程如下：

	<u>修讀期</u>
(a) 中專教育文憑課程（印刷媒體）（BCC學銜）	最少一年
(b) 中專教育文憑課程（印刷媒體）（CC學銜）	兩年至三年
(c) 中專教育文憑課程（印刷媒體）（TFC學銜）	一年至兩年
(d) 中專教育文憑課程（印刷媒體）（DVE學銜）	一年至三年
(e) 為香港知專設計學院及香港專業教育學院（設計及工商管理學科）學生提供的實務訓練	3至180小時

註：： BCC : 基本技術證書

CC : 技工證書

TFC : 技術員基礎證書

DVE : 中專教育文憑

傳意設計及數碼媒體學系

4.33 本會呼籲僱主全力支持香港知專設計學院屬下的傳意設計及數碼媒體學系，積極僱用其全日制課程畢業生。該學院所辦的相關課程列載於附錄20。

印刷科技研究中心

4.34 1999年9月，香港印刷業商會與職業訓練局轄下的香港專業教育學院（觀塘）合作推行項目，協助本地印刷及出版業公司過渡至最新的數碼製作流程。合作項目為期三年，在創新及科技基金資助下，於2000年5月3日在觀塘分校設立「印刷科技研究中心」（APTEC）。該中心已於2012年遷往香港知專設計學院。

4.35 印刷科技研究中心扮演著科技轉移中心的角色，負責向本地印刷及出版業公司傳達最新科技趨勢的資訊。在各大國際設備供應商的鼎力支持下，中心現有先進的數碼印刷製作環境，有各大供應商採用的印刷器材，模擬業界環境。中心又舉辦科技轉移研討會、開辦專業培訓課程、進行嶄新科技研究，以及提供專業顧問服務等，致力協助印刷及出版業公司由傳統作業流程過渡至數碼工作流程。

4.36 2003年1月31日完成合作項目後，印刷科技研究中心亦揭開新一頁。為了繼續服務業界，中心轉為以自負盈虧模式營運，成為香港印刷業商會的附屬中心。香港印刷業商會亦與職業訓練局簽訂協議，建立新的合作關係。

4.37 近年，印刷科技研究中心與國際標準組織印刷技術委員會（ISO/TC130）、中國全國印刷標準化技術委員會（National Technical Committee 170 on Printing of Standardization Administration of China）、美國國際數碼企業聯盟（IDEAlliance）、美國羅徹斯特理工學院（RIT）、FOGRA德國印藝技術研究協會等合作，積極向業界推廣國際印刷標準及色彩管理。2011年、2013年及2014年，在中小企業發展支援基金的資助下，印刷科技研究中心舉行了三場大型國際技術交流會議及一系列工作坊，向業界介紹最新科技趨勢。

訓練手冊

4.38 本會為印刷業的主要職務出版訓練方案及工作範圍手冊，可供僱主制訂培訓計劃或評估僱員技能水平時作為參考，請僱主善加利用。

VTC的培訓服務

4.39 VTC提供下列免費服務，協助僱主制訂員工訓練計劃：

- (a) 法定**學徒訓練計劃**：有效培訓技術員和技工，以應付業內需求；
- (b) 「**職**」**學創前路先導計劃**：結合有系統的職業教育和在職培訓，提供清晰的進修路徑，為人手需求殷切的行業吸納人才；
- (c) **工科畢業生訓練計劃**：協助工科學生和工科畢業生完成工程師專業訓練；
- (d) 自願參加性質的**技能測驗及證書頒發制度**：確立技術人員應有的技術水平；以及
- (e) **新科技培訓計劃**：向本地公司提供資助，派送僱員到海外或在本地學習新科技。津貼額最高可達訓練開支的50%。

本港僱主如對上述訓練計劃有興趣，歡迎聯絡VTC查詢。

增加教育及訓練設施

4.40 香港是亞太區內的主要服務中心，印刷及出版服務亦必須維持國際水平。因應所推算的人力需求，本會建議各專上院校應研究增辦印刷及出版方面的學位、高級文憑及文憑課程；僱主則應為僱員提供更多職內訓練，並批准他們接受職外增修訓練。

外間課程／研討會

4.41 本會與各院校及出版機構合作，為印刷及出版從業員舉辦了多個短期實務課程／研討會，加強他們的專業知識和技能，協助他們適應日新月異的經濟情況及行業要求。本會相信這類外間的培訓課程／研討會很有果效，建議僱主善加利用，以提升僱員的專業水平。

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PRINTING AND PUBLISHING TRAINING BOARD
印刷及出版業訓練委員會

Membership (as at 31st March 2015)
委員名單（截至二〇一五年三月三十一日止）

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主席

Mr YAN Tak-chung, Alex
任德聰先生

Vice-chairman

副主席

Dr LEE Ka-kui
李家駒博士

Members

委員

Mr CHAN Ka-yeung, Edmund
陳家揚先生

Mr CHAN Tat-kin
陳達堅先生

Mr Fung Man-ching
馮文清先生

Ms KWONG Kwan-lai
鄭群麗女士

Mr LAU Man-pong, Peter
劉文邦先生

Mr Clemence LEUNG
梁嘉麒先生

Mr LEUNG Siu-yin
梁兆賢先生

Mr LO Kwok-ming, Herman
盧國明先生

Ms MA Chun-mui, Muriel
馬鎮梅女士

Mr MAK Wai-kei
麥偉基先生

Dr Allen SHI lop-tak MH, JP
史立德博士 MH, JP

Mr SIT Sai-yu
薛世儒先生

Mr SO Wah-sum, Conrad
蘇華森先生

Ms Isa WONG
黃嫻女士

Dr WONG Yin-yue, Sharon
黃燕如博士

Ms CHOI Lai-wah, Clara
蔡麗華女士

Ms Charmaine LO
盧雯慧女士

Mr WONG Kei-yung
黃基勇先生

Mr LU-Lam, Leslie
盧林先生

Secretary
秘書

Mr CHENG Tai-man
鄭泰民先生

Terms of Reference of the Printing and Publishing Training Board

1. To determine the manpower demand of the industry, including the collection and analysis of relevant manpower and student/trainee statistics and information on socio-economic, technological and labour market developments.
2. To assess and review whether the manpower supply for the industry matches with the manpower demand.
3. To recommend to the Vocational Training Council the development of vocational education and training facilities to meet the assessed manpower demand.
4. To advise the Hong Kong Institute of Vocational Education (IVE) and Pro-Act Training & Development Centres on the direction and strategic development of their programmes in the relevant disciplines.
5. To advise on the course planning, curriculum development and quality assurance systems of IVE and Pro-Act Training & Development Centres.
6. To prescribe job specifications for the principal jobs in the industry defining the skills, knowledge and training required.
7. To advise on training programmes for the principal jobs in the industry specifying the time a trainee needs to spend on each skill element.
8. To tender advice in respect of skill assessments, trade tests and certification for in-service workers, apprentices and trainees, for the purpose of ascertaining that the specified skill standards have been attained.
9. To advise on the conduct of skill competitions in key trades in the industry for the promotion of vocational education and training as well as participation in international competitions.
10. To liaise with relevant bodies, including employers, employers' associations, trade unions, professional institutions, training and educational institutions and government departments, on matters pertaining to the development and promotion of vocational education and training in the industry.
11. To organise seminars/conferences/symposia on vocational education and training for the industry.
12. To advise on the publicity relating to the activities of the Training Board and relevant vocational education and training programmes of VTC.
13. To submit to the Council an annual report on the Training Board's work and its recommendations on the strategies for programmes in the relevant disciplines.
14. To undertake any other functions delegated by the Council in accordance with Section 7 of the Vocational Training Council Ordinance.

印刷及出版業訓練委員會職權範圍

1. 確定業內的人力需求，包括收集、分析相關的人力和學生／學員統計數字，以及關於社會經濟、科技及人力市場發展的資料。
2. 評估及研究本業的人力供求是否平衡。
3. 就發展業內專業教育及訓練設施應付人力需求，向職業訓練局提供意見。
4. 就相關學科的課程發展方向及策略，向香港專業教育學院(IVE)、卓越培訓發展中心提出建議。
5. 就 IVE、卓越培訓發展中心的課程策劃、課程發展及質素保證制度提供意見。
6. 擬訂本業主要職務的工作範圍，界定所需的技能、知識及訓練。
7. 建議本業主要職務訓練方案，訂定每種技能所需的訓練期。
8. 對技術評估、技能測驗及證書頒發制度提供意見，以確定從業員、學徒及見習員的技能水平。
9. 就本業主要行業舉辦技能比賽提供意見，以推廣專業教育與訓練和派員參加國際賽事。
10. 就本業專業教育及訓練的發展與推廣事宜，與僱主、僱主聯會、工會、專業團體、訓練及教育機構、政府部門等聯絡。
11. 為本業舉辦有關專業教育及訓練的研討會與會議。
12. 就業內訓練委員會工作、有關職訓局專業教育及訓練課程的宣傳事宜提供意見。
13. 每年向局方呈交訓練委員會工作報告，以及相關學科課程發展策略建議。
14. 根據《職業訓練局條例》第 7 條，負責局方所委派的其他工作。

Vocational Training Council 職業訓練局

Headquarters Division 2 總辦事處二科
 6F, 20A Tsing Yi Road, Tsing Yi Island, New Territories, Hong Kong
 香港新界青衣島青衣路20A號6樓
 www.vtc.edu.hk

Telephone No 電話

Facsimile No 傳真 2574 3759

Our Reference 本局檔號 (7) in PP/4/2 (2014)

Your Reference 來函檔號



12 May 2014

Dear Sir/Madam,

The 2014 Manpower Survey of the Printing Industry

I am writing to seek your support and co-operation in the coming Manpower Survey of the Printing Industry to be conducted by the Printing and Publishing Training Board of the Vocational Training Council (VTC) from 19 May 2014 to 18 June 2014.

A reference day is given as 2 May 2014 to collect, among other matters, the following information about each of the principal jobs in the printing industry:

- (i) the number of employees at present employed;
- (ii) the number of employees under training;
- (iii) the number of existing vacancies; and
- (iv) a forecast of the total number of employees in 12 months' time.

Based on the survey findings, the Training Board will make recommendations on manpower training for the printing industry.

 I enclosed herewith for your reference and completion the following documents in both English and Chinese:

- (a) one copy of the questionnaire (Appendix A);
- (b) explanatory notes about the questionnaire (Appendix B); and
- (c) a list of job descriptions of the principal jobs (Appendix C).

An officer of the Census and Statistics Department will contact your office during the survey period. The officer will answer any questions you may have and assist in the completion of the questionnaire if necessary.

I sincerely hope that you will co-operate in this survey by providing the required information that is of vital importance to the formulation of future training plans for the printing industry. The information collected will be handled in strict confidence and will be published only in the form of statistical summaries without reference to any individual establishments.

You are welcome to download the report in due course. You may wish to download the previous version of the Manpower Survey Report on the printing and publishing industries from the VTC website at <http://pptb.vtc.edu.hk>. The 2014 Manpower Survey Report will also be uploaded when it is ready.

Should you have any questions in connection with the survey, please contact the Manpower Statistics Section of the Census and Statistics Department at 2116 8324.

Yours faithfully,



(YAN Tak-chung, Alex)
Chairman

Printing and Publishing Training Board

Vocational Training Council 職業訓練局

Headquarters Division 2 總辦事處二科
 6F, 20A Tsing Yi Road, Tsing Yi Island, New Territories, Hong Kong
 香港新界青衣島青衣路20A號6樓
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執事先生/女士:

印刷業二零一四年人力調查

職業訓練局屬下印刷及出版業訓練委員會將於二零一四年五月十九日至六月十八日期間進行印刷業人力調查，調查參考日期將定為二零一四年五月二日，希望 貴機構能惠予合作，提供業內各主要職務的有關資料，其中包括:

- (一) 目前僱員人數；
- (二) 目前受訓僱員人數；
- (三) 現有空缺數目；及
- (四) 預計十二個月後的僱員總數。

本訓練委員會將根據調查結果，就印刷業人力訓練事宜提出建議。

---- 隨函附上下列中英文對照文件，以供參閱及填寫:

- (一) 調查表(附錄甲)；
- (二) 調查表附註(附錄乙)；及
- (三) 各主要職務工作說明(附錄丙)。

政府統計處職員將於調查期間聯絡貴機構，解答有關問題及在需要時協助填表。

懇請 貴機構支持合作，提供是次調查所需資料;該等資料對制定印刷業未來的訓練計劃將會極為重要。調查所得資料將絕對保密，只用摘要統計數字發表，並不會提及任何個別機構。

本訓練委員會歡迎貴機構下載過往之印刷及出版業人力調查報告外，是次人力調查報告書將會上載本局網頁，網址為 <http://pptb.vtc.edu.hk>，歡迎下載。

如對是次調查有任何查詢，請致電 2116 8324 與政府統計處人力統計組聯絡。



印刷及出版業訓練委員會主席
任德聰

二零一四年五月十二日

CONFIDENTIAL
WHEN ENTERED WITH DATA
填入數據後即成
機密文件

VOCATIONAL TRAINING COUNCIL
職業訓練局

THE 2014 MANPOWER SURVEY OF THE PRINTING INDUSTRY
印刷業二零一四年人力調查

QUESTIONNAIRE
調查表

(PLEASE READ THE EXPLANATORY NOTES BEFORE COMPLETING THIS QUESTIONNAIRE)
(填表前，請參閱附註)

For Official Use Only: 此欄毋須填寫	Rec. Type	Survey Code	Industry Code	Establishment No.	Enumerator's No.	Editor's No.	Check Digit	No. of Employees Covered by the Questionnaire
	1	09 2 3	4 5 6 7 8 9	10 11 12 13 14 15	16 17	18 19	20 21 22	23 24 25 26 27

NAME OF ESTABLISHMENT:
廠名／機構名稱

ADDRESS:
地址

TOTAL NO. OF PERSONS ENGAGED:
僱員總數

TYPE OF PRODUCTS/SERVICE*:

產品種類／服務性質*

* can choose more than one option
可選擇多於一項

Commercial Printing
28 商業印刷

Package Printing
29 包裝印刷

Newspaper Printing
30 報紙印刷

Printing Agent
31 印刷代理

Equipment & Materials Supplier
32 器材及物料供應商

Others
33 其他

Please specify 請註明

Is your company involved in digital printing? 貴公司有否從事數碼印刷?

Yes **
34

No
35

**if yes, please fill in the number of staff engaged
如有，請選擇形式及填寫員工數目

Number of digital printing staff:
從事數碼印刷員工人數:

36

(Please tick in the appropriate box 請在適當空格內加上 '✓')

NAME OF PERSON TO CONTACT:

聯絡人姓名

38

POSITION:
職位

TEL. NO.:

電話

58 65 67 74

FAX NO.:

圖文傳真

E-MAIL:
電郵

75 109

Part I 第一部分

(A) Job 工作			(B) Monthly Income Code	(C) No. of Employed as at 2.5.2014 (excl. trainees)	(D) Forecast of No. Employees in 12 Months' time (excl. trainees)	(E) No. of Vacancies as at 2.5.2014 (excl. trainees)	(F) No. of Trainees as at 2.5.2014	Average Monthly Income 每月平均收入																		
Title 職稱	Rec. Type 記錄 類型	No. 職務 編號	每月收入 編號	在2.5.2014之 現有僱員人數 (受訓者除外)	預計 在十二個月後 僱員人數 (受訓者除外)	在2.5.2014之 空缺額 (受訓者除外)	在2.5.2014之 受訓者 人數																			
		8 - 10	11	12 - 15	16 - 19	20 - 22	23 - 25	Enter in column B employee's average monthly income range according to the following codes. The income should include basic wages, guaranteed year-end bonus, regular overtime pay cost of living allowance, mea allowance etc. 請將僱員的每月平均收入 幅度按照下列類別編號 填入B欄內。「每月平均 收入」包括底薪固定發放 的年終花紅、定期超時工 作工資、生活津貼、 膳食津貼等。																		
1 General Manager 總經理	2	1 0 1						<table border="1"> <thead> <tr> <th>Code 編號</th> <th>Monthly Income Range 每月收入幅度</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>\$8,000 or below \$8,000 或以下</td> </tr> <tr> <td>2</td> <td>\$8,001 - \$10,000</td> </tr> <tr> <td>3</td> <td>\$10,001 - \$15,000</td> </tr> <tr> <td>4</td> <td>\$15,001 - \$20,000</td> </tr> <tr> <td>5</td> <td>\$20,001 - \$30,000</td> </tr> <tr> <td>6</td> <td>\$30,001 - \$45,000</td> </tr> <tr> <td>7</td> <td>\$45,001 - \$60,000</td> </tr> <tr> <td>8</td> <td>\$60,001 or above \$60,001 或以上</td> </tr> </tbody> </table>	Code 編號	Monthly Income Range 每月收入幅度	1	\$8,000 or below \$8,000 或以下	2	\$8,001 - \$10,000	3	\$10,001 - \$15,000	4	\$15,001 - \$20,000	5	\$20,001 - \$30,000	6	\$30,001 - \$45,000	7	\$45,001 - \$60,000	8	\$60,001 or above \$60,001 或以上
Code 編號	Monthly Income Range 每月收入幅度																									
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4	\$15,001 - \$20,000																									
5	\$20,001 - \$30,000																									
6	\$30,001 - \$45,000																									
7	\$45,001 - \$60,000																									
8	\$60,001 or above \$60,001 或以上																									
2 Production / Quality Manager 生產經理/廠務經理/品質經理	2	1 0 2																								
3 Sales / Customer Services / Marketing Manager 營業/客戶服務/市場推廣經理	2	1 0 3																								
4 Procurement Manager 採購經理	2	1 0 4																								
5 Information Technology Manager (Printing 資訊科技經理(印刷))	2	1 0 5																								
6 Cost Estimator 印刷估價員	2	2 0 1																								
7 Production Planner / Production Controller / Quality Controller 生產策劃員/生產管制員/品質管制員	2	2 0 2																								
8 Sales Representative 營業代表	2	2 0 3																								
9 Overseer / Supervisor 督導員/管理員	2	2 0 4																								
10 Electrical & Mechanical Maintenance Technicia (Printing) 機電維修(印刷)技術員	2	2 0 5																								
11 Designer / Design Officer 設計員/設計主任	2	2 0 6																								
12 Prepress Technician 印前技術員	2	2 0 7																								
13 Purchasing Officer / Controller 印刷物料採購員/控制員	2	2 0 8																								
14 Technical Services/Products (Printing) Technicia 技術/產品(印刷)技術員	2	2 0 9																								
15 Information Technology (Printing) Technicia 資訊科技(印刷)技術員	2	2 1 0																								
16 Electronic Prepress System Craftsman 電子印前系統操作技工	2	3 0 1																								
17 Offset Lithographic Platemake 柯式版製作技工	2	3 0 2																								
18 Digital Printing System Craftsman 數碼印刷系統操作技工	2	3 0 3																								
19 Printing Machine Craftsman (Offset Litho) (Sheet-fed 單張給紙式柯式平板機印刷技工	2	3 0 4																								
20 Printing Machine Craftsman (Offset Litho) (Web-fed 捲筒給紙式柯式平板機印刷技工	2	3 0 5																								
21 Other Printing Machine Craftsman 其他印刷機械及包裝印刷操作技工	2	3 0 6																								
22 Binding Craftsman 裝訂技工	2	3 0 7																								
23 Die Cutting / Tool Making Craftsman 啤盒工/造模工	2	3 0 8																								
24 Package Finishing Machine Craftsman 包裝盒完成機技工	2	3 0 9																								
25 Other Print Finishing Craftsman 其他印後機械技工	2	3 1 0																								
26 General Worker 雜工	2	4 0 1																								
27																										
28																										

Note 1 : If additional lines are necessary, please tick here and enter on supplementary sheets.
附註一： 如此頁已填滿，請先將 (✓) 號填入此 內，然後在附頁繼續填寫。

Note 2 : The term "trainees" includes all trainees receiving any form of training and apprenticeship under a contract of apprenticeship.
附註二： 「受訓者」包括正在接受各種訓練的人士，以及簽有學徒合約的登記學徒。

<p>Q.1 Employer's View on the Expected Change in Business Situation for the Coming Year 僱主對來年業務狀況預期變動的意見</p> <p>Better 較佳 <input type="checkbox"/> 8</p> <p>Same 不變 <input type="checkbox"/> 9</p> <p>Worse 較差 <input type="checkbox"/> 10</p> <p>(Please tick as appropriate) (請在適當的格內填上✓號)</p>	<p>For Official Use Only (此欄毋須填寫)</p> <p><input type="checkbox"/> 11</p>	<p>Q.2 Number of Printing Employees Promoted in the Industry 晉升的印刷業僱員人數</p> <p>Number of printing employees in the industry promoted in respect of new recruited or existing posts during the past 12 months (1.5.2013 to 30.4.2014): 過去十二個月內(1.5.2013 至 30.4.2014)晉升以填補增設職位或現有空缺的印刷業僱員人數:</p> <p>Technologists / Managers 技師/管理人員 <input type="checkbox"/> 12</p> <p>Technicians / Supervisors 技術員/督導人員 <input type="checkbox"/> 14</p> <p>Craftsmen 技工 <input type="checkbox"/> 16</p> <p>For Official Use Only (此欄毋須填寫) <input type="checkbox"/> 18</p>
<p>Q.3 Number of Technical Staff Deployed to Work Outside Hong Kong 任職香港以外地方的技術員工工人數</p> <p>Please enter below the number of staff who had been deployed to work for more than 6 months outside Hong Kong during the 12 months (1.5.2013 to 30.4.2014) prior to the survey. 請填寫調查前十二個月內(1.5.2013 至 30.4.2014), 調派往香港以外地方工作超過六個月的技術員工工人數</p> <p>Technologists / Managers 技師/管理人員 <input type="checkbox"/> 19</p> <p>Technicians / Supervisors 技術員/督導人員 <input type="checkbox"/> 21</p> <p>Craftsmen 技工 <input type="checkbox"/> 23</p> <p>For Official Use Only (此欄毋須填寫) <input type="checkbox"/> 25</p>	<p>Q.4 Whether with Production Workshop in the mainland of China? 是否在中國內地設有廠房? (Please tick in the appropriate box) (請在適當空格內加上✓)</p> <p>Number of Mainland employees (excluding those employees deployed from HK) 內地僱員數目(不包括從香港派往的僱員)</p> <p>Technologists / Managers 技師/管理人員 <input type="checkbox"/> 26</p> <p>Technicians / Supervisors 技術員/督導人員 <input type="checkbox"/> 27</p> <p>Craftsmen 技工 <input type="checkbox"/> 28</p>	<p>For Official Use Only (此欄毋須填寫)</p> <p><input type="checkbox"/> 26</p> <p><input type="checkbox"/> 27</p> <p><input type="checkbox"/> 28</p>
<p>Q.5 Education and Training an Employee Should Have 僱員宜有的教育及訓練</p> <p>Please enter in the boxes at the left table the education and training an employee should have according to the following codes: 請將僱員宜有的教育及訓練按照下列類別編號填入左面表格方格內:</p>		
<p>Technologist/Managerial Level 技師/管理級</p> <p>Education 教育 <input type="checkbox"/> 42</p> <p>Training Mode 訓練方式 <input type="checkbox"/> 43</p> <p>Training Period 訓練時間 <input type="checkbox"/> 44</p>	<p>Technician/Supervisory Level 技術員/督導級</p> <p>Education 教育 <input type="checkbox"/> 45</p> <p>Training Mode 訓練方式 <input type="checkbox"/> 46</p> <p>Training Period 訓練時間 <input type="checkbox"/> 47</p>	<p>Craftsman Level 技工級</p> <p>Education 教育 <input type="checkbox"/> 48</p> <p>Training Mode 訓練方式 <input type="checkbox"/> 49</p> <p>Training Period 訓練時間 <input type="checkbox"/> 50</p>
<p>Code 編號</p> <p>1 University Degree or above 大學學位或以上</p> <p>2 Higher Diploma/Associate Degree 高級文憑/副學士</p> <p>3 Diploma/Higher Certificate 文憑/高級證書</p> <p>4 Certificate/Secondary 4 to 7/ or equivalent Hong Kong Diploma of Secondary Education 證書/中四至中七/ 香港中學文憑或同等學歷</p> <p>5 Craft Certificate/ Secondary 3 or below 技工證書/中三或以下</p>	<p>Code 編號</p> <p>1 On the job training 在職訓練</p> <p>2 Apprenticeship 學徒訓練</p> <p>3 Others 其他</p>	<p>Code 編號</p> <p>1 4 years or above 四年或以上</p> <p>2 3 to less than 4 years 三年至四年以下</p> <p>3 2 to less than 3 years 兩年至三年以下</p> <p>4 1 to less than 2 years 一年至兩年以下</p> <p>5 6 - less than 12 months 六至十二個月以下</p> <p>6 Below 6 months 六個月以下</p>

Part III 第三部分

Empolyees Left
僱員離職

Q.6 Please fill in the number of employees who had left your establishment in the past 12 months (1.5.2013 to 30.4.2014).
請填寫過去十二個月內(1.5.2013 至 30.4.2014)，離職的僱員人數。

Technologists /
Managerial Level
技師／管理級

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51

Technicians /
Supervisory Level
技術員／督導級

--	--	--	--

54

Craftsmen
Level
技工級

--	--	--	--

57

For Official
Use Only
(此欄毋須填寫)

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60

Recruitment
招聘

Q.7 Please fill in the number of new recruits in the past 12 months (1.5.2013 to 30.4.2014).
請填寫過去十二個月內(1.5.2013 至 30.4.2014)，新招聘的僱員人數。

Technologists /
Managerial Level
技師／管理級

--	--	--	--

61

Technicians /
Supervisory Level
技術員／督導級

--	--	--	--

64

Craftsmen
Level
技工級

--	--	--	--

67

--	--	--	--

70

(a) Total number of recruits
總招聘人數

(b) Number of recruits who have performed printing related duties in their last jobs from item (a) above
上列(a)項中，在上一個工作崗位是從事印刷業相關職務的人數

--	--	--	--

71

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74

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77

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80

Q.8 Difficulties Encountered in Recruitment
招聘困難

Did your establishment encounter any difficulties in recruitment in the past 12 months (1.5.2013 to 30.4.2014)?
過去十二個月(1.5.2013 至 30.4.2014)，貴機構招聘印刷業僱員時，有沒有遇到困難？

(Please tick in the appropriate box)
(請在適當空格內加上 '✓')

Yes (please go to Q.9)
81 有 (請回答第九題)

No (please go to Q.10)
82 沒有 (請跳答第十題)

No recruitment (please go to Q.10)
沒有招聘需要 (請跳答第十題)

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84

Q.9 Major Difficulties in Recruitment
主要招聘困難

Please give the major difficulties in recruitment your establishment encountered in the past 12 months (1.5.2013 to 30.4.2014).

(You may choose up to three options from code (A) to (H).
請說明 貴機構在過去十二個月(1.5.2013 至 30.4.2014)所遇到的主要招聘困難。
(可於編號(A)至(H)選最多三項。)

Technologists /
Managerial Level
技師／管理級

--	--	--	--

85

Technicians /
Supervisory Level
技術員／督導級

--	--	--	--

86

Craftsmen
Level
技工級

--	--	--	--

87

--	--	--	--

88

Most important reason of recruitment difficulty
主要招聘困難原因

Second important reason of recruitment difficulty
次要招聘困難原因

--	--	--	--

89

--	--	--	--

90

--	--	--	--

91

--	--	--	--

92

Third important reason of recruitment difficulty
其次招聘困難原因

--	--	--	--

93

--	--	--	--

94

--	--	--	--

95

--	--	--	--

96

Other Difficulties (Please Specify)
其他招聘困難(請註明)

--	--	--	--

97

Code Reasons of recruitment difficulties
編號 招聘困難原因

(A) Candidates lacked the relevant skills/expertise
應徵者並無相關技能／知識

(B) Candidates lacked the relevant experience
應徵者缺乏相關經驗

(C) Candidates lacked the relevant academic qualification
應徵者未具相關學歷

(D) Candidates' language skills (including Putonghua) were poor
應徵者語文能力(包括普通話)水平欠佳

(E) Candidates found the remuneration package not attractive
應徵者認為薪酬欠吸引

(F) Candidates were unwilling to work on shift for long hours
應徵者不願意長時間輪班工作

(G) Candidates were unwilling to work in the mainland of China
應徵者不願意到中國內地工作

(H) Others (Please Specify)
其他(請註明)

Q.10 Employees' Training Needs

僱員的訓練需要

What types of training will your establishment need from the course providers in the next 12 months in response to the various changes (including Hong Kong's transformation into a knowledge-based economy)? (You may choose up to three options from code (101) to (511))
為迎合各方面的轉變（包括香港轉型至知識型經濟），在未來十二個月，貴機構需要培訓機構提供哪方面的培訓？
（可於編號（101）至（511）選最多三項。）

	<u>Technologists / Managerial Level</u> 技師／管理級	<u>Technicians / Supervisory Level</u> 技術員／督導級	<u>Craftsmen Level</u> 技工級	For Official Use Only (此欄毋須填寫)
Most important training needs 最主要訓練需要	<input type="text"/> 98	<input type="text"/> 101	<input type="text"/> 104	<input type="text"/> 107
Second important training needs 次要訓練需要	<input type="text"/> 108	<input type="text"/> 111	<input type="text"/> 114	<input type="text"/> 117
Third important training needs 其次訓練需要	<input type="text"/> 118	<input type="text"/> 121	<input type="text"/> 124	<input type="text"/> 127
Other Training Needs (Please Specify) 其他訓練需要(請註明)	<hr/>			<input type="text"/> 128

Code Type of Skills and/ or Knowledge
編號 技能／知識的類別

(I) Management Skills

管理技能

- 101 Production management
製作管理
- 102 Quality management
品質管理
- 103 Marketing management
經銷管理
- 104 Customer services
客戶服務
- 105 Others (Please Specify)
其他（請註明）

Code Type of Skills and/ or Knowledge
編號 技能／知識的類別

(II) China-related Knowledge

有關中國的知識

- 201 Political, social and economic development in the mainland of China
在中國內地的政治、社會和經濟發展
- 202 Laws and regulatory restrictions for access to China's market
進入中國市場的法律和經濟發展
- 203 Trade and industry environment in the mainland of China
在中國內地的行業及營商常規
- 204 Others (Please Specify)
其他（請註明）

Code Type of Skills and/ or Knowledge
編號 技能／知識的類別

(III) IT Skills

資訊科技的技能

- 301 Computer graphics and webpage design
電腦圖像處理與網頁設計
- 302 E-commerce knowledge and applications
電子商貿的知識及應用
- 303 Media technology
媒體科技
- 304 Others (Please Specify)
其他（請註明）

(IV) Language Skills

語文技能

- 401 Spoken English
英語會話
- 402 Putonghua
普通話
- 403 Others (Please Specify)
其他（請註明）

(V) Industry Specific Skills

業內專業技能

- 501 Pre-press technique
印前技術
- 502 Printing technique
印刷技術
- 503 Post-printing technique
印後技術
- 504 Production coordination and project management
生產協調及項目管理
- 505 Estimation and costing
估價及成本
- 506 Repair and maintenance
機械維修及保養
- 507 Colour management
色彩管理
- 508 Products Structure
產品結構
- 509 Materials application
物料應用
- 510 Quality Assurance
品質保證
- 511 Others (Please Specify)
其他（請註明）

THE 2014 MANPOWER SURVEY OF THE PRINTING INDUSTRY

印刷業二零一四年人力調查

EXPLANATORY NOTES

附 註

1. Please fill in as accurate information as possible because the information is vital to the Printing and Publishing Training Board in determining the training needs of the industry and in making meaningful recommendations to the Government on how to meet these needs.
填寫調查表時請盡量填入準確資料；印刷及出版業訓練委員會將根據此等重要資料，確定本業的訓練需求及向政府提供建議。

Part I

第一部分

2. When filling this part of the questionnaire, please ignore the numbers in the row immediately beneath the headings. They are purely column numbers for data processing.
填寫此部分時，請毋須理會標題下的編號，此乃分欄編號，只供資料處理用。
3. Before completing, please read carefully the job titles and job descriptions in Appendix C.
填寫前，請先細閱附錄丙所列的職稱與工作說明。
4. Please complete all columns ('A' to 'F') of the questionnaire that are applicable and insert a zero (0) in any column which is not.
請填寫表內各欄('A'至'F')，如有不適用者則在該欄內填入(0)符號。
5. Job Titles - Column 'A'
職稱——'A'欄
 - (a) Please enter into column 'A' those job titles, together with their appropriate code numbers specified in Appendix C, applicable to your establishment in order of their skill levels (i.e. technologist/managerial level jobs first followed by technician/supervisory, craftsman and unskilled level jobs).
請將附錄丙內適用於貴機構的職稱連同編號，按其技能等級，填入'A'欄內。(先填技師／管理級，其後填寫技術員／督導級、技工級及非技術人員。)

- (b) Please add in column 'A' titles of any jobs not mentioned in Appendix C, and briefly describe them and indicate their skill levels.

如貴機構另有技術性職稱未載於附錄丙，請一併填入 'A' 欄內，並扼要說明其工作性質及技能等級。

- (c) Please classify a worker according to his main duty irrespective of any additional secondary duties he may be required to perform, e.g. a craftsman who works mainly as a binding craftsman but is also required to operate die-cutting machine occasionally should be classified as a binding craftsman but not as a die cutting craftsman.

請根據僱員的主要職務分類，例如一名技工的主要職務為裝訂書刊，但有時需擔任啤盒的工作，則應屬裝訂技工而非啤盒工。

6. Monthly Income - Column 'B'

僱員每月收入 —— 'B' 欄

Please enter into this column the total monthly income range code for each type of workers. This should include basic wages, overtime pay, cost of living allowance, meal allowance, bonus (including double pay) etc., if any. If you have more than one worker doing the same job, please enter the average figure.

請在此欄填入每類僱員每月總收入幅度的類別編號，這包括底薪、超時工作工資、生活津貼、膳食津貼、花紅(包括雙糧)等在內。若從事同類工作的僱員多於一名，則請取其平均收入。

7. Number of Employed as at 2.5.2014 (Excluding Trainees) - Column 'C'

在2014年5月2日之現有僱員人數（受訓者除外） —— 'C' 欄

Please fill in the total number of employees (excluding trainees) for any one job in your establishment. 'Employees' refer to those working full-time under the payroll of the organisation. These include proprietors and partners working full-time for the organisation. This definition also applies to 'employee(s)' appearing in other parts of the questionnaire.

請將各職務現有僱員總數（受訓者除外）填入此欄。「僱員」指在貴機構內全職工作的受薪人員，其中包括在機構內全職工作的東主及合夥人。在調查表其他地方出現的「僱員」一詞，定義亦同。

8. Forecast of Number Employees in 12 Months' Time (Excluding Trainees) – Columns 'D'

預計十二個月後的僱員人數（受訓者除外） —— 'D' 欄

Please fill in the number of employees against each principal job you will be employing 12 months from now (excluding trainees).

請填寫預計十二個月後的僱員人數（受訓者除外）。

9. Number of Vacancies as at 2.5.2014 (Excluding Trainees) - Column 'E'
在2014年5月2日之現有空缺額（受訓者除外）——‘E’欄

Please fill in the number of existing vacancies (excluding those for trainees).

請填入貴機構現有的空缺額（受訓者空缺額除外）。

‘Existing Vacancies’ refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel at date of survey.

「現有空缺額」是指該職位仍懸空，須立刻填補而現正積極招聘人員填補。

10. Number of Trainees as at 2.5.2014 - Column 'F'
在2014年5月2日之現有受訓者人數——‘F’欄

Please fill in the total number of employees undergoing training. This includes trainees receiving any form of training and apprentices under a contract of apprenticeship.

請填寫正在接受訓練的僱員總數。這包括正在接受各種形式訓練的受訓者，以及簽有合約的學徒。

Part II **第二部分**

11. Q.1
Employer's view on the Expected Change in Business Situation for the Coming Year
僱主對來年業務狀況預期變動的意見

The purpose of this question is to seek your view on the expected change in business situation for the coming year, whether your business situation would be better, the same or worse for the coming year than this year.

此題目的在調查貴機構的意見，有關僱主對來年業務狀況預期的變動，預計閣下明年的業務狀況比今年較佳，不變或較差。

12. Q.2
Number of Printing Employees Promoted in the Industry
晉升的印刷業僱員人數

Please fill in the number of printing employees promoted in the past 12 months (1.5.2013 to 30.4.2014) by job level based upon the job titles as prescribed in Appendix C.

請填入貴機構在過去十二個月(1.5.2013 至 30.4.2014)晉升的印刷業各技能等級僱員人數（各職稱可參見附錄丙）。

13. Q.3
Number of Technical Staff Deployed to Work Outside Hong Kong

任職香港以外地方的技術員工人數

Please enter the number of staff at the technologist/managerial, technician/supervisory and craftsman levels who had been deployed to work for more than 6 months outside Hong Kong in the past 12 months (1.5.2013 to 30.4.2014).

請填寫過去十二個月內(1.5.2013 至 30.4.2014)，調派往香港以外地方工作超過六個月的技師／管理級、技術員／督導級及技工級員工人數。

14. Q.4
Whether with Production Workshop in the mainland of China?

是否在中國內地設有廠房？

Please enter the total number of Mainland employees by job level (excluding those employees deployed from Hong Kong) working in operations in the mainland of China which manufacture products for your establishment and are under your establishment's control. Staff involved in engineering, management, clerical and production work in such operations should be included (but workers seconded from Hong Kong should be excluded). Please disregard the name or ownership of such operations.

請填寫在內地廠房為貴機構生產製成品，並為貴機構所管理各技能等級的中國內地僱員總數（不包括香港僱員）。內地僱員總數包括工程人員、管理人員、文職人員及生產人員（但不包括派往當地工作的香港人）。請毋須理會這些廠房的名稱或擁有權。

15. Q.5
Education and Training an Employee Should Have

僱員宜有的教育及訓練

The purpose of this question is to solicit your view on the education and training for which an employee in a particular job should have so that he could appreciate the technology behind his work.

(Please refer to the codes at the right of the table.)

此題目的在調查貴機構就各類職位的僱員宜具備何種教育程度及訓練以勝任其工作的意見。（請參閱該表右欄的類別編號。）

16. Q.6
Employees Left

僱員離職

Please enter the number of employees who had left your establishment in the past 12 months (1.5.2013 to 30.4.2014).

請填寫過去十二個月內(1.5.2013 至 30.4.2014)，貴機構離職的僱員人數。

17. Q.7
Recruitment
招聘

- (a) Please enter the number of new recruits in the past 12 months (1.5.2013 to 30.4.2014); and
請填寫過去十二個月內(1.5.2013 至 30.4.2014)，貴機構新招聘的僱員人數；及
- (b) the number of recruits who have performed printing services related duties in their last jobs from item (a).
在上列(a)項中，在上一個工作崗位是從事印刷業相關職務的人數。

18. Q.8
Difficulties Encountered in Recruitment
招聘困難

Please indicate whether your establishment encountered any difficulties in the recruitment of printing employees in the past 12 months (1.5.2013 to 30.4.2014). If your establishment had no recruitment needs or had not encountered any difficulties, please go to question (10).

請填寫貴機構在過去十二個月(1.5.2013 至 30.4.2014)招聘印刷業僱員時，是否遇到招聘困難？如沒有招聘需要或沒有遇上招聘困難，請跳答第(10)題。

19. Q.9
Major Difficulties in Recruitment
主要招聘困難

Please give the major recruitment difficulties your establishment encountered in the past 12 months (1.5.2013 to 30.4.2014). (may choose up to 3 options). (Please refer to the codes at the bottom of the table)

請說明貴機構在過去十二個月(1.5.2013 至 30.4.2014)所遇到的主要招聘困難。(最多可選三項)(請參閱該表下面的類別編號)

20. Q.10
Employees' Training Needs
僱員的訓練需要

Please fill in the types of training that your establishment will need from the course providers in the next 12 months (1.5.2014 to 30.4.2015) (including Hong Kong's transforming into a knowledge-based economy) (Please refer to the codes at the bottom of the table).

為迎合各方面的轉變(包括香港轉型至知識型經濟)，請填寫在未來十二個月(1.5.2014 至 30.4.2015)，貴機構所需要由培訓機構提供的培訓類別。(請參閱該表下面的類別編號)

21. Example

例子

To facilitate proper completion, an example is given below for your reference.

為協助閣下填表，現將例子附錄如下以供參考。

Example

例子

Part I 第一部分

(A) Job 工作			(B) Monthly Income Code 每月收入 編號	(C) No. of Employed as at 2.5.2014 (excl. trainees) 在2.5.2014之 現有僱員人數 (受訓者除外)	(D) Forecast of No. Employees in 12 Months' time (excl. trainees) 預計 在十二個月後 僱員人數 (受訓者除外)	(E) No. of Vacancies as at 2.5.2014 (excl. trainees) 在2.5.2014之 空缺額 (受訓者除外)	(F) No. of Trainees as at 2.5.2014 在2.5.2014之 受訓者 人數
Title 職稱	Rec. Type 記錄 類型	No. 職務 編號					
			11	12 - 15	16 - 19	20 - 22	23 - 25
1 Digital Printing System Craftman 數碼印刷系統操作技工	2	3 0 3	2	5	7	1	1
2	2						
3	2						
4	2						
5	2						
6	2						
7	2						
8	2						
9	2						
10	2						
11	2						
12	2						
13	2						
14	2						
15	2						
16	2						
17	2						
18	2						
19	2						
20	2						
21	2						
22	2						
23	2						
24	2						
25	2						

Average Monthly Income
每月平均收入

Enter in column B
employee's average monthly
income range according to
the following codes. The
income should include basic
wages, guaranteed year-end
bonus, regular overtime pay,
cost of living allowance, mea
allowance etc.
請將僱員的每月平均收入
幅度按照下列類別編號
填入B欄內。「每月平均
收入」包括底薪固定發放
的年终奖紅、定期超時工
作工資、生活津貼、
膳食津貼等。

Code 編號	Monthly Income Range 每月收入幅度
1	\$8,000 or below \$8,000 或以下
2	\$8,001 - \$10,000
3	\$10,001 - \$15,000
4	\$15,001 - \$20,000
5	\$20,001 - \$30,000
6	\$30,001 - \$45,000
7	\$45,001 - \$60,000
8	\$60,001 or above \$60,001 或以上

Note 1: If additional lines are necessary, please tick here and enter on supplementary sheets.
附註一：如此頁已填滿，請先將 (✓) 號填入此 內，然後在附頁繼續填寫。

Note 2: The term "trainees" includes all trainees receiving any form of training and apprentices under a contract of apprenticeship.
附註二：「受訓者」包括正在接受各種訓練的人士，以及簽有學徒合約的登記學徒。

Job Descriptions for Principal Jobs in Printing Industry

印刷業主要職務工作說明

Code No. 編號	Job Title 職 稱	Job Description 工作說明
TECHNOLOGIST / MANAGERIAL LEVEL 技師／管理級		
101	General Manager 總經理	Assists the employer in planning, budgeting, directing and controlling all aspects of the establishment including the overall supervision of associated areas to ensure the most effective and economical means of production. 協助僱主策劃、預算、指導及管制公司之各項工作，包括監控公司的一切運作，以確保高度生產效率及符合經濟原則。
102	Production / Quality Manager 生產經理／廠務經理／ 品質經理	Plans and executes print production systems. Takes charge of production, manages and directs the production department personnel to maintain quality and productivity and to exercise effective production and cost control. Plans, organises, directs and controls quality control procedures in all stages of production to ensure incoming materials and products comply with required standards and specifications. 從事策劃與執行已經制訂的印刷生產方針，進行生產工作，並領導所屬員工保持產品的品質與生產效率，與及實施有效的生產及成本管理。策劃、編排、指導及管制生產方面各階段的品質管制工作程序，以確保入廠的原料及產品符合既定標準及規格。
103	Sales / Customer Services / Marketing Manager 營業／客戶服務／市場推廣經理	Keeps abreast of the up-to-date development and quality requirements of the markets; plans, approves and supervises the co-ordination and presentation of samples and quotations, negotiates with clients. Oversees and follows up clients' orders, liaises with appropriate departments to ensure delivery dates being met. 不斷密切留意市場最新之發展及市場品質的需求。策劃、批准及監督樣品製作與報價的配合及提交等工作，並與客戶商討，統籌及處理客戶定單，並與有關部門聯絡，以確保客戶定單能依期付運。
104	Procurement Manager 採購經理	Plans, directs and controls the procurement activities of the company to ensure production schedules are met. 策劃、監督及控制公司的採購工作，確保生產工作依期完成。
105	Information Technology Manager (Printing) 資訊科技經理 (印刷)	Plans, directs, controls and manages the operation and development of the IT equipment and systems to support the company business. 策劃、督導及管理資訊科技設備及系統的運作及發展，以支援公司的業務。

Code No. 編號	Job Title 職 稱	Job Description 工作說明
TECHNICIAN/SUPERVISORY LEVEL 技術員／督導級		
201	Cost Estimator 印刷估價員	Prepares estimates of the cost of producing jobs according to agreed specifications and methods of production and maintains production records. Records actual costs involved (material and labour) of jobs completed or in progress; up-dates budget centre rates, labour rates and all variable cost factors regularly; prepares periodic financial statements to the management. 按照議定的規格，估計印件成本及生產方法和保持生產記錄。記錄已完成或製作中的印件所需的實際成本（材料及工資）；定期修訂成本單位預算、工資率及各變動成本因素；為廠方編製週期財務決算表。
202	Production Planner / Production Controller / Quality Controller 生產策劃員／生產管制員／品質管制員	Plans, schedules and controls workload making full use of all equipment, materials and labour throughout the factory. Co-ordinates with clients. Carries out process planning for jobs and estimates the time requirements for operations. Ensures production schedules are met. Ensures materials of the correct quality are used, controls quality of printed work by measurement and statistical methods, and supervises final inspection. 充份利用工廠所有設備、材料及人力，以計劃及控制工作量，與客戶保持聯繫。並制訂工作程序表。將每項職務分析為不同的操作程序，定下每個程序的所需時間，並確保生產工作依期完成。確保用料正當，利用量度及統計方法管制印刷的品質，並督導最後階段的檢查。
203	Sales Representative 營業代表	Assists Sales/ Customer Services/ Marketing Manager in liaising with clients on the preparation of quotations and orders. Follows up clients' orders, and promotes establishment's products and services. 協助營業經理與客戶聯系有關報價及定單事宜，與及推銷公司產品及服務。
204	Overseer / Supervisor 督導員／管理員	Controls, organises and oversees production in his department. 控制、組織及管理屬下部門的生產工作。
205	Electrical & Mechanical Maintenance Technician (Printing) 機電維修（印刷）技術員	Installs, maintains and repairs printing machinery and equipment. 裝卸、保養及修理印刷機械及裝置。
206	Designer / Design Officer 設計員／設計主任	Handles the design and layout of company publications (including staff bulletins, product brochures and promotion publications). 處理公司刊物(包括員工通訊、產品宣傳/推廣印刷品等)的設計及排版工作。

Code No. 編號	Job Title 職 稱	Job Description 工作說明
TECHNICIAN/SUPERVISORY LEVEL (Continued) 技術員/督導級 (續)		
207	Prepress Technician 印前技術員	Makes use of printing languages, images, colour prints and layout softwares to handle customer files; and operates plate-making computers and digital proofing equipment. 利用印刷專業文字、影像、色彩處理及排版軟件處理客戶檔案；並操作電腦直接製版及數碼打稿器材。
208	Purchasing Officer / Controller 印刷物料採購員/控制員	Handles the procurement of printing equipment and materials, and takes charge of warehousing work. 處理採購印刷器材及物料事宜，並負責物料倉存等工作。
209	Technical Services/Products (Printing) Technician 技術/產品(印刷)技術員	Engages in the assembly, demonstration and instruction of printing equipment, materials and products. 從事印刷器材、物料及產品的裝配、示範及指導。
210	Information Technology (Printing) Technician 資訊科技(印刷)技術員	Assists in the planning, design and maintenance of computerised administration and manufacturing information systems in the company. 協助策劃、設計及維護印刷公司的電腦化行政及生產資訊系統。
CRAFTSMAN LEVEL 技工級		
301	Electronic Prepress System Craftsman 電子印前系統操作技工	Inputs and processes data, edits text, manipulates black and white or colour graphics and illustrations on desktop publishing terminal; operates computer output devices such as laser printer or imagesetter. 在桌面排版終端機輸入及處理資料，編輯內文，黑白或彩色圖像處理；操作電子或桌面分色機製備分色黑白軟片，沖洗軟片或相紙。
302	Offset Lithographic Platemaker 柯式版製作技工	Assembles film and produces offset plates for machine printing and/or operates computerised mask cutting system. 併合軟片及製作柯式印版作印刷之用，及/或操作電腦蒙片裁切系統。
303	Digital Printing System Craftsman 數碼印刷系統操作技工	Makes ready, sets up, operates and maintains digital printing system, including digital photocopier and inkjet printer. 準備、調較、操作及保養數碼印刷系統，包括數碼影印及噴墨打印機。
304	Printing Machine Craftsman (Offset Litho) (Sheet-fed) 單張給紙式柯式平版機印刷技工	Makes ready, sets up, operates and maintains sheet-fed single or multi colour offset printing machines. 準備、調較、操作及保養單張給紙式單色或多色柯式印刷機。

Code No. 編號	Job Title 職 稱	Job Description 工作說明
CRAFTSMAN LEVEL (Continued) 技工級 (續)		
305	Printing Machine Craftsman (Offset Litho) (Web-fed) 捲筒給紙式柯式平版機 印刷技工	Makes ready, sets up, operates and maintains web-fed offset printing machines including newspaper printing machines. 準備、調較、操作及保養捲筒給紙式柯式平版印刷機包括印報章用的柯式輪轉印刷機。
306	Other Printing Machine Craftsman 其他印刷機械及包裝印刷 操作技工	Makes ready, sets up, operates and maintains screen, plastic card, label, printed circuit board, gravure, flexographic, pat print, etc. printing machines. 準備、調校、操作及保養絲網/膠咭/凸版標籤/電路版/凹版/柔性版/Pat Print等印刷機。
307	Binding Craftsman 裝訂技工	Sets, operates and maintains machines for bookbinding or in-line bookbinding, publishers' edition binding, stationery work, booklet and periodical binding and carries out hand binding operations. 調校、操作及保養裝訂機器或聯機裝訂，從事精裝、平裝書籍及部冊裝訂，小冊子及期刊裝訂，以及各類手工裝訂工作。
308	Die Cutting / Tool Making Craftsman 啤盒工/造模工	Makes ready, sets up, operates and maintain die-cutting machine, or uses tools to cut shape and insert cutting and creasing rules on wood base in accordance with design. 準備、調較、操作及保養啤機，或根據設計，利用工具掘型造模，在木板上嵌進切割刀和壓詠刀。
309	Package Finishing Machine Craftsman 包裝盒完成機技工	Makes ready, sets up, operates and maintains window patching and/or folding and gluing machines. Performs hand folding, gluing and quality control. 準備、調較、操作及保養貼窗和/或摺盒及貼盒機。做簡單的手摺盒，貼盒工作和控制品質。
310	Other Print Finishing Craftsman 其他印後機械技工	Makes ready, sets up, operates and maintains the following print finishing machines such as laminating, varnishing, calendaring, hot stamping, embossing, drilling, etc. 準備、調較、操作及保養下列印後機械，如過膠、過油、磨光、燙金、擊凸、鑽孔等。
UNSKILLED LEVEL 非技術人員級		
401	General Worker 雜工	Handles odd jobs, loads or unloads paper, or packs products and undertakes any other manual work. 擔任零碎工作，裝上或卸落紙張，或製成品包裝，以及從事其他勞力工作。

Vocational Training Council 職業訓練局

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 6F, 20A Tsing Yi Road, Tsing Yi Island, New Territories, Hong Kong
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 www.vtc.edu.hk

Telephone No 電話

Facsimile No 傳真 2574 3759

Our Reference 本局檔號 (7) in PP/4/2 (2014)

Your Reference 來函檔號



12 May 2014

Dear Sir/Madam,

The 2014 Manpower Survey of the Publishing Industry

I am writing to seek your support and co-operation in the coming Manpower Survey of the Publishing Industry to be conducted by the Printing and Publishing Training Board of the Vocational Training Council (VTC) from 19 May 2014 to 18 June 2014.

A reference day is given as 2 May 2014 to collect, among other matters, the following information about each of the principal jobs in the publishing industry:

- (i) the number of employees at present employed;
- (ii) the number of employees under training;
- (iii) the number of existing vacancies; and
- (iv) a forecast of the total number of employees in 12 months' time.

Based on the survey findings, the Training Board will make recommendations on manpower training for the publishing industry.

 I enclosed herewith for your reference and completion the following documents in both English and Chinese:

- (a) one copy of the questionnaire (Appendix A);
- (b) explanatory notes about the questionnaire (Appendix B); and
- (c) a list of job descriptions of the principal jobs (Appendix C).

An officer of the Census and Statistics Department will contact your office during the survey period. The officer will answer any questions you may have and assist in the completion of the questionnaire if necessary.

I sincerely hope that you will co-operate in this survey by providing the required information that is of vital importance to the formulation of future training plans for the publishing industry. The information collected will be handled in strict confidence and will be published only in the form of statistical summaries without reference to any individual establishments.

You are welcome to download the report in due course. You may wish to download the previous version of the Manpower Survey Report on the printing and publishing industries from the VTC website at <http://pptb.vtc.edu.hk>. The 2014 Manpower Survey Report will also be uploaded when it is ready.

Should you have any questions in connection with the survey, please contact the Manpower Statistics Section of the Census and Statistics Department at 2116 8324.

Yours faithfully,



(YAN Tak-chung, Alex)
Chairman
Printing and Publishing Training Board

Vocational Training Council 職業訓練局

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 www.vtc.edu.hk

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Facsimile No 傳真

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Our Reference 本局檔號 (7) in PP/4/2 (2014)

Your Reference 來函檔號



執事先生/女士：

出版業二零一四年人力調查

職業訓練局屬下印刷及出版業訓練委員會將於二零一四年五月十九日至六月十八日期間進行出版業人力調查，調查參考日期將定為二零一四年五月二日，希望 貴機構能惠予合作，提供業內各主要職務的有關資料，其中包括：

- (一) 目前僱員人數；
- (二) 目前受訓僱員人數；
- (三) 現有空缺數目；及
- (四) 預計十二個月後的僱員總數。

本訓練委員會將根據調查結果，就出版業人力訓練事宜提出建議。

---- 隨函附上下列中英文對照文件，以供參閱及填寫：

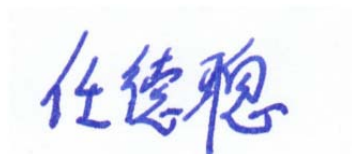
- (一) 調查表(附錄甲)；
- (二) 調查表附註(附錄乙)；及
- (三) 各主要職務工作說明(附錄丙)。

政府統計處職員將於調查期間聯絡貴機構，解答有關問題及在需要時協助填表。

懇請 貴機構支持合作，提供是次調查所需資料;該等資料對制定印刷業未來的訓練計劃將會極為重要。調查所得資料將絕對保密，只用摘要統計數字發表，並不會提及任何個別機構。

本訓練委員會歡迎貴機構下載過往之印刷及出版業人力調查報告外，是次人力調查報告書將會上載本局網頁，網址為 <http://pptb.vtc.edu.hk>，歡迎下載。

如對是次調查有任何查詢，請致電 2116 8324 與政府統計處人力統計組聯絡。



印刷及出版業訓練委員會主席
任德聰

二零一四年五月十二日

CONFIDENTIAL
WHEN ENTERED WITH DATA
填入數據後即成
機密文件

VOCATIONAL TRAINING COUNCIL
職業訓練局

THE 2014 MANPOWER SURVEY OF THE PUBLISHING INDUSTRY
出版業二零一四年人力調查
QUESTIONNAIRE
調查表

(PLEASE READ THE EXPLANATORY NOTES BEFORE COMPLETING THIS QUESTIONNAIRE)
(填表前，請參閱附註)

For Official Use Only: 此欄毋須填寫	Rec. Type <input type="checkbox"/> 1	Survey Code <input type="checkbox"/> 3 <input type="checkbox"/> 2 2 3	Industry Code <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9	Establishment No. <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> 13 <input type="checkbox"/> 14 <input type="checkbox"/> 15	Enumerator's No. <input type="checkbox"/> 16 <input type="checkbox"/> 17	Editor's No. <input type="checkbox"/> 18 <input type="checkbox"/> 19	Check Digit <input type="checkbox"/> 20 <input type="checkbox"/> 21 <input type="checkbox"/> 22	No. of Employees Covered by the Questionnaire <input type="checkbox"/> 23 <input type="checkbox"/> 24 <input type="checkbox"/> 25 <input type="checkbox"/> 26 <input type="checkbox"/> 27
----------------------------------	---	---	--	--	---	---	--	--

NAME OF ESTABLISHMENT: _____ ADDRESS: _____
廠名 / 機構名稱 地址

TOTAL NO. OF PERSONS ENGAGED: _____
僱員總數

TYPE OF PRODUCTS/SERVICE*: 產品種類 / 服務性質* <small>* can choose more than one option 可選擇多於一項</small>	Books Publishing 書籍出版社 <input type="checkbox"/> 28 一般圖書 <input type="checkbox"/> 29 學術書籍 <input type="checkbox"/> 30 教科書 / 參考書	Magazine Publishing 雜誌出版社 <input type="checkbox"/> 31 雜誌 <input type="checkbox"/> 32 學術期刊	Newspaper Publishing <input type="checkbox"/> 33 報紙出版	Others <input type="checkbox"/> 34 其他 Please specify 請註明 _____
Is your company involved in electronic publishing? 貴公司有否從事電子出版? <input type="checkbox"/> 35 Yes ** <input type="checkbox"/> 36 No **If yes, please choose the type and fill in the number of staff engaged 如有，請選擇形式及填寫員工數目	<input type="checkbox"/> 37 網上出版 <input type="checkbox"/> 38 資料光碟 <input type="checkbox"/> 39 從事電子出版員工人數: _____			

(Please tick in the appropriate box 請在適當空格內加上 '✓')

NAME OF PERSON TO CONTACT: _____ POSITION: _____
聯絡人姓名 職位

TEL. NO.: _____ 61 - _____ 68 70 - _____ 77
電話

E-MAIL: _____ 78
電郵

VTC-PU-01 _____ 112

(A) Job 工作			(B) Monthly Income Code	(C) No. of Employed as at 2.5.2014 (excl. trainees)	(D) Forecast of No. Employees in 12 Months' time (excl. trainees)	(E) No. of Vacancies as at 2.5.2014 (excl. trainees)	(F) No. of Trainees as at 2.5.2014	Average Monthly Income 每月平均收入
Title 職稱	Rec. Type 記錄 類型	No. 職務 編號	每月收入 編號	在2.5.2014之 現有僱員人數 (受訓者除外)	預計 在十二個月後 僱員人數 (受訓者除外)	在2.5.2014之 空缺額 (受訓者除外)	在2.5.2014之 受訓者 人數	
		8 - 10	11	12 - 15	16 - 19	20 - 22	23 - 25	
Managing Director / General Manager / Publisher / Chief Executive Director / President 董事經理/總經理/出版人/社長	2	1 5 1						Enter in column B employee's average monthly income range according to the following codes. The income should include basic wages, guaranteed year-end bonus, regular overtime pay, cost of living allowance, mea allowance etc.
Editorial Director / Chief Editor / Managing Editor / Publishing Director 總編輯/主編	2	1 5 2						請將僱員的每月平均收入 幅度按照下列類別編號 填入B欄內。「每月平均 收入」包括底薪固定發放 的年終花紅、定期超時工 作工資、生活津貼、 膳食津貼等。
Design Director / Art Director 設計總監/美術總監	2	1 5 3						
Production Director / Production Manager 製作總監/製作經理	2	1 5 4						
Marketing Director / Marketing Manager 市場總監/市場經理	2	1 5 5						
Sales Director / Sales Manager (Newspaper and Magazine Publications) 營業總監/營業經理(報刊)	2	1 5 6						
Sales Director / Sales Manager (Book Publications) 營業總監/營業經理(書刊)	2	1 5 7						
Editorial Manager 編輯經理	2	1 5 8						
Manager (E-publishing) 電子出版經理	2	1 5 9						
Commissioning Editor / Acquisition Editor 策劃編輯	2	2 5 1						
Senior Editor 高級編輯	2	2 5 2						
Designer 設計師	2	2 5 3						
Production Supervisor 製作主任	2	2 5 4						
Sales Supervisor 營業主任	2	2 5 5						
Marketing / Publicity Supervisor 市場/宣傳主任	2	2 5 6						
Customer Services Supervisor / Officer (Books) 客戶服務主任(書籍)	2	2 5 7						
Circulation Supervisor (Magazines & Newspapers) 發行主任(報刊)	2	2 5 8						
Supervisor (E-publishing) 電子出版主任	2	2 5 9						
Assistant Editor / Copy Editor / Art Editor / Proof Reader 助理編輯/稿件編輯/美術編輯/校對員	2	3 5 1						
Art Designer 美術設計員	2	3 5 2						
Illustrator 插圖員	2	3 5 3						
Desktop Publishing (DTP) / E-publishing Technician 桌面排版 / 電子出版操作員	2	3 5 4						
Production Assistant 製作助理	2	3 5 5						
Sales Representative / Sales Executive 營業代表/營業主任	2	3 5 6						
Marketing / Publicity Assistant 市場助理/宣傳助理	2	3 5 7						
	2							
	2							
	2							

Note 1 : If additional lines are necessary, please tick here and enter on supplementary sheets.
附註一： 如此頁已填滿，請先將(✓)號填入此 內，然後在附頁繼續填寫。

Note 2 : The term "trainees" includes all trainees receiving any form of training and apprentices under a contract of apprenticeship.
附註二： 「受訓者」包括正在接受各種訓練的人士，以及簽有學徒合約的登記學徒。

<p>Q.1 <u>Employer's View on the Expected Change in Business Situation for the Coming Year</u> 僱主對來年業務狀況預期變動的意見</p> <p>Better 較佳 <input type="checkbox"/> 8</p> <p>Same 不變 <input type="checkbox"/> 9</p> <p>Worse 較差 <input type="checkbox"/> 10</p> <p>(Please tick as appropriate) (請在適當的格內填上✓號)</p>	<p>For Official Use Only (此欄毋須填寫)</p> <p><input type="checkbox"/> 11</p>	<p>Q.2 <u>Number of Publishing Employees Promoted in the Industry</u> 晉升的出版業僱員人數</p> <p>Number of publishing employees in the industry promoted in respect of new recruited or existing posts during the past 12 months (1.5.2013 to 30.4.2014): 過去十二個月內 (1.5.2013 至 30.4.2014) 晉升以填補增設職位或現有空缺的出版業僱員人數:</p> <p>Managers 經理 <input type="checkbox"/> 12</p> <p>Supervisors 主任 <input type="checkbox"/> 14</p> <p>Technical Staff 技術人員 <input type="checkbox"/> 16</p> <p>For Official Use Only (此欄毋須填寫)</p> <p><input type="checkbox"/> 18</p>
<p>Q.3 <u>Number of Technical Staff Deployed to Work in the Mainland of China</u> 調派往中國內地工作的員工人數</p> <p>Please enter below the number of staff who had been deployed to work in Mainland China for more than 6 months during the 12 months (1.5.2013 to 30.4.2014) prior to the survey. 請填寫調查前十二個月內 (1.5.2013 至 30.4.2014), 調派往內地工作超過六個月的員工人數</p> <p>Managers 經理 <input type="checkbox"/> 19 <input type="checkbox"/> 25 <input type="checkbox"/> 31</p> <p>Supervisors 主任 <input type="checkbox"/> 21 <input type="checkbox"/> 27 <input type="checkbox"/> 33</p> <p>Technical Staff 技術人員 <input type="checkbox"/> 23 <input type="checkbox"/> 29 <input type="checkbox"/> 35</p> <p>Design & Production 設計及制作 <input type="checkbox"/> 37</p> <p>Sales 營銷 <input type="checkbox"/> 38</p> <p>Editing 編輯 <input type="checkbox"/> 39</p>	<p>For Official Use Only (此欄毋須填寫)</p> <p><input type="checkbox"/> 41</p>	<p>Q.4 <u>Whether with Company in the mainland of China?</u> 是否在中國內地設有公司? (Please tick in the appropriate box) (請在適當空格內加上✓)</p> <p>Number of Mainland employees (excluding those employees deployed from HK) 內地僱員數目 (不包括從香港派往的僱員)</p> <p>Managers 經理 <input type="checkbox"/> 43</p> <p>Supervisors 主任 <input type="checkbox"/> 45</p> <p>Technical Staff 技術人員 <input type="checkbox"/> 47</p> <p>Yes 是 <input type="checkbox"/> 40</p> <p>No 否 <input type="checkbox"/> 41</p> <p>For Official Use Only (此欄毋須填寫)</p> <p><input type="checkbox"/> 42</p> <p><input type="checkbox"/> 49</p>
<p>Q.5 <u>Education and Training an Employee Should Have</u> 僱員宜有的教育及訓練</p> <p>Managerial Level 經理級</p> <p>Supervisory Level 主任級</p> <p>Technical Staff Level 技術人員級</p> <p>Education 教育 <input type="checkbox"/> 50</p> <p>Training Mode 訓練方式 <input type="checkbox"/> 51</p> <p>Training Period 訓練時間 <input type="checkbox"/> 52</p> <p>Education 教育 <input type="checkbox"/> 53</p> <p>Training Mode 訓練方式 <input type="checkbox"/> 54</p> <p>Training Period 訓練時間 <input type="checkbox"/> 55</p> <p>Education 教育 <input type="checkbox"/> 56</p> <p>Training Mode 訓練方式 <input type="checkbox"/> 57</p> <p>Training Period 訓練時間 <input type="checkbox"/> 58</p>	<p>Please enter in the boxes at the left table the education and training an employee should have according to the following codes: 請將僱員宜有的教育及訓練按照下列類別編號填入左面表格方格內:</p> <p>Code 編號</p> <p>Education 教育</p> <p>1 University Degree or above 大學學位或以上</p> <p>2 Higher Diploma/Associate Degree 高級文憑/副學士</p> <p>3 Diploma/Higher Certificate 文憑/高級證書</p> <p>4 Certificate/Secondary 4 to 7/ Hong Kong Diploma of Secondary Education or equivalent 證書/中四至中七/香港中學文憑或同等學歷</p> <p>5 Craft Certificate/ Secondary 3 or below 技工證書/中三或以下</p> <p>Code 編號</p> <p>Training Mode 訓練方式</p> <p>1 On the job training 在職訓練</p> <p>2 Apprenticeship 學徒訓練</p> <p>3 Others 其他</p> <p>Code 編號</p> <p>Training Period 訓練時間</p> <p>1 4 years or above 四年或以上</p> <p>2 3 to less than 4 years 三年至四年以下</p> <p>3 2 to less than 3 years 兩年至三年以下</p> <p>4 1 to less than 2 years 一年至兩年以下</p> <p>5 6 - less than 12 months 六至十二個月以下</p> <p>6 Below 6 months 六個月以下</p>	

Empolyees Left
僱員離職

Q.6 Please fill in the number of employees who had left your establishment in the past 12 months (1.5.2013 to 30.4.2014).
請填寫過去十二個月內 (1.5.2013 至 30.4.2014) , 離職的僱員人數。

Managerial Level
經理級

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59

Supervisory Level
主任級

--	--	--

62

Technical Staff Level
技術人員級

--	--	--

65

For Official Use Only
(此欄毋須填寫)

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68

Recruitment
招聘

Q.7 Please fill in the number of new recruits in the past 12 months (1.5.2013 to 30.4.2014).
請填寫過去十二個月內 (1.5.2013 至 30.4.2014) , 新招聘的僱員人數。

(a) Total number of recruits
總招聘人數

Managerial Level
經理級

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69

Supervisory Level
主任級

--	--	--

72

Technical Staff Level
技術人員級

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75

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78

(b) Number of recruits who have performed publishing related duties in their last jobs from item (a) above
上列(a)項中, 在上一個工作崗位是從事出版業相關職務的人數

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79

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82

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85

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88

Q.8 Difficulties Encountered in Recruitment
招聘困難

Did your establishment encounter any difficulties in recruitment in the past 12 months (1.5.2013 to 30.4.2014)?
過去十二個月 (1.5.2013 至 30.4.2014) , 貴機構招聘出版業僱員時, 有沒有遇到困難?

(Please tick in the appropriate box)
(請在適當空格內加上 '✓')

Yes (please go to Q.9) 89 有 (請回答第九題) No (please go to Q.10) 90 沒有 (請跳答第十題) No recruitment (please go to Q.10) 91 沒有招聘需要 (請跳答第十題)

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92

Q.9 Major Difficulties in Recruitment
主要招聘困難

Please give the major difficulties in recruitment your establishment encountered in the past 12 months (1.5.2013 to 30.4.2014).
(You may choose up to three options from code (A) to (H))

請說明 貴機構在過去十二個月 (1.5.2013 至 30.4.2014) 所遇到的主要招聘困難。
(可於編號(A)至(H)選最多三項。)

Most important reason of recruitment difficulty
主要招聘困難原因

Managerial Level
經理級

--

93

Supervisory Level
主任級

--

94

Technical Staff Level
技術人員級

--

95

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96

Second important reason of recruitment difficulty
次要招聘困難原因

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97

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98

--

99

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100

Third important reason of recruitment difficulty
其次招聘困難原因

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101

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102

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103

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104

Other Difficulties (Please Specify)
其他招聘困難(請註明)

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105

Code **Reasons of recruitment difficulties**
編號 **招聘困難原因**

- | | |
|---|---|
| (A) Candidates lacked the relevant skills/expertise
應徵者並無相關技能/知識 | (E) Candidates found the remuneration package not attractive
應徵者認為薪酬欠吸引 |
| (B) Candidates lacked the relevant experience
應徵者缺乏相關經驗 | (F) Candidates were unwilling to work on shift for long hours
應徵者不願意長時間輪班工作 |
| (C) Candidates lacked the relevant academic qualification
應徵者未具相關學歷 | (G) Candidates were unwilling to work in the mainland of China
應徵者不願意到中國內地工作 |
| (D) Candidates' language skills (including Putonghua) were poor
應徵者語文能力 (包括普通話) 水平欠佳 | (H) Others (Please Specify)
其他 (請註明) |

Q.10 Employees' Training Needs

僱員的訓練需要

What types of training will your establishment need from the course providers in the next 12 months in response to the various change (including Hong Kong's transformation into a knowledge-based economy)? (You may choose up to three options from code (101) to (507). 為迎合各方面的轉變（包括香港轉型至知識型經濟），在未來十二個月，貴機構需要培訓機構提供哪方面的培訓？（可於編號(101)至(507)選最多三項。）

	<u>Managerial Level</u> 經理級	<u>Supervisory Level</u> 主任級	<u>Technical Staff Level</u> 技術人員級	For Official Use Only (此欄毋須填寫)
Most important training needs 最主要訓練需要	<input type="text"/> 106	<input type="text"/> 109	<input type="text"/> 112	<input type="text"/> 115
Second important training needs 次要訓練需要	<input type="text"/> 116	<input type="text"/> 119	<input type="text"/> 122	<input type="text"/> 125
Third important training needs 其次訓練需要	<input type="text"/> 126	<input type="text"/> 129	<input type="text"/> 132	<input type="text"/> 135
Other Training Needs (Please Specify) 其他訓練需要(請註明)	_____			<input type="text"/> 136

Code Type of Skills and/ or Knowledge
編號 技能／知識的類別

(I) Management Skills

管理技能

- 101 Production management
製作管理
- 102 Quality management
品質管理
- 103 Marketing management
經銷管理
- 104 Customer services
客戶服務
- 105 Others (Please Specify)
其他（請註明）

Code Type of Skills and/ or Knowledge
編號 技能／知識的類別

(II) China-related Knowledge

有關中國的知識

- 201 Political, social and economic development in the mainland of China
在中國內地的政治、社會和經濟發展
- 202 Laws and regulatory restrictions for access to China's market
進入中國市場的法律和經濟發展
- 203 Trade and industry environment in the mainland of China
在中國內地的行業及營商常規
- 204 Others (Please Specify)
其他（請註明）

Code Type of Skills and/ or Knowledge
編號 技能／知識的類別

(III) IT Skills

資訊科技的技能

- 301 Computer graphics and webpage design
電腦圖像處理與網頁設計
- 302 E-commerce knowledge and applications
電子商貿的知識及應用
- 303 Media technology
媒體科技
- 304 Others (Please Specify)
其他（請註明）

(IV) Language Skills

語文技能

- 401 Spoken English
英語會話
- 402 Putonghua
普通話
- 403 Others (Please Specify)
其他（請註明）

(V) Industry Specific Skills

業內專業技能

- 501 Editing
編輯
- 502 Artwork/ Design
稿件設計
- 503 Publishing production
出版製作
- 504 Marketing
市場推廣
- 505 Sales and customer service
銷售及客戶服務
- 506 Logistics
物流
- 507 Others (Please Specify)
其他（請註明）

THE 2014 MANPOWER SURVEY OF THE PUBLISHING INDUSTRY

出版業二零一四年人力調查

EXPLANATORY NOTES

附 註

1. Please fill in as accurate information as possible because the information is vital to the Printing and Publishing Training Board in determining the training needs of the industry and in making meaningful recommendations to the Government on how to meet these needs.

填寫調查表時請盡量填入準確資料；印刷及出版業訓練委員會將根據此等重要資料，確定本業的訓練需求及向政府提供建議。

Part I

第一部分

2. When filling this part of the questionnaire, please ignore the numbers in the row immediately beneath the headings. They are purely column numbers for data processing.

填寫此部分時，請毋須理會標題下的編號，此乃分欄編號，只供資料處理用。

3. Before completing, please read carefully the job titles and job descriptions in Appendix C.

填寫前，請先細閱附錄丙所列的職稱與工作說明。

4. Please complete all columns ('A' to 'F') of the questionnaire that are applicable and insert a zero (0) in any column which is not.

請填寫表內各欄（'A' 至 'F'），如有不適用者則在該欄內填入 (0) 符號。

5. Job Titles - Column 'A'

職稱 —— 'A' 欄

- (a) Please enter into column 'A' those job titles, together with their appropriate code numbers specified in Appendix C, applicable to your establishment in order of their skill levels (i.e. managerial level jobs first followed by supervisory and technical staff level jobs).

請將附錄丙內適用於貴機構的職稱連同編號，按其技能等級，填入 'A' 欄內。（先填經理級，其後填寫主任級及技術人員級。）

- (b) The titles may not be the same as those adopted by your establishment, but if the description of a certain job in your establishment is the same or substantially the same as one of the jobs given in Appendix C, then for the purpose of this survey, please enter that job title.

這些職稱可能有別於貴機構所採用者，但如該僱員的工作性質，與附錄丙某職稱所述的工作說明相同或近似，則可將其歸類為此職稱，而不論其在貴機構的實際職稱為何。

- (c) Please add in column 'A' titles of any jobs not mentioned in Appendix C, and briefly describe them and indicate their skill levels.

如貴機構另有技術性職稱未載於附錄丙，請一併填入 'A' 欄內，並扼要說明其工作性質及技能等級。

- (d) Please classify a staff according to his main duty irrespective of any additional secondary duties he may be required to perform, e.g. art designer who works mainly as graphic art work but is also required to carry desktop publishing work occasionally should be classified as art designer but not as desktop publishing operator.

請根據僱員的主要職務分類，例如一名技術輔助員的主要職務為製備美術正稿及網頁，但有時需擔任桌面排版的工作，則應屬美術設計員而非桌面排版操作員。

6. Monthly Income - Column 'B'

僱員每月收入 —— 'B' 欄

Please enter into this column the total monthly income range code for each type of workers. This should include basic wages, overtime pay, cost of living allowance, meal allowance, bonus (including double pay) etc., if any. If you have more than one worker doing the same job, please enter the average figure.

請在此欄填入每類僱員每月總收入幅度的類別編號，這包括底薪、超時工作工資、生活津貼、膳食津貼、花紅(包括雙糧)等在內。若從事同類工作的僱員多於一名，則請取其平均收入。

7. Number of Employed as at 2.5.2014 (Excluding Trainees) - Column 'C'

在2014年5月2日之現有僱員人數（受訓者除外） —— 'C' 欄

Please fill in the total number of employees (excluding trainees) for any one job in your establishment. 'Employees' refer to those working full-time under the payroll of the organisation. These include proprietors and partners working full-time for the organisation. This definition also applies to 'employee(s)' appearing in other parts of the questionnaire.

請將各職務現有僱員總數（受訓者除外）填入此欄。「僱員」指在貴機構內全職工作的受薪人員，其中包括在機構內全職工作的東主及合夥人。在調查表其他地方出現的「僱員」一詞，定義亦相同。

8. Forecast of Number Employees in 12 Months' Time (Excluding Trainees) – Columns 'D'
預計十二個月後的僱員人數（受訓者除外）——‘D’欄

Please fill in the number of employees against each principal job you will be employing 12 months from now (excluding trainees).
請填寫預計十二個月後的僱員人數（受訓者除外）。

9. Number of Vacancies as at 2.5.2014 (Excluding Trainees) - Column 'E'
在2014年5月2日之現有空缺額（受訓者除外）——‘E’欄

Please fill in the number of existing vacancies (excluding those for trainees).
請填入貴機構現有的空缺額（受訓者空缺額除外）。
‘Existing Vacancies’ refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel at date of survey.
「現有空缺額」是指該職位仍懸空，須立刻填補而現正積極招聘人員填補。

10. Number of Trainees as at 2.5.2014 - Column 'F'
在2014年5月2日之現有受訓者人數——‘F’欄

Please fill in the total number of employees undergoing training. This includes trainees receiving any form of training and apprentices under a contract of apprenticeship.
請填寫正在接受訓練的僱員總數。這包括正在接受各種形式訓練的受訓者，以及簽有合約的學徒。

Part II **第二部分**

11. Q.1
Employer's View on the Expected Change in Business Situation for the Coming Year
僱主對來年業務狀況預期變動的意見

The purpose of this question is to seek your view on the expected change in business situation for the coming year, whether your business situation would be better, the same or worse for the coming year than this year:
此題目的在調查貴機構的意見，有關僱主對來年業務狀況預期的變動，預計閣下明年的業務狀況比今年較佳，不變或較差。

12. Q.2
Number of Publishing Employees Promoted in the Industry
晉升的出版業僱員人數

Please fill in the number of publishing employees promoted in the past 12 months (1.5.2013 to 30.4.2014) by job level based upon the job titles as prescribed in Appendix C.
請填入貴機構在過去十二個月(1.5.2013 至 30.4.2014)晉升的出版業各技能等級僱員人數（各職稱可參見附錄丙）。

13. Q.3
Number of Employees Deployed to Work in the mainland of China
被調派往內地工作的僱員人數

Please enter the number of staff at the managerial, supervisory and technical staff levels in design & production, sales and editing areas who had been deployed to work for more than 6 months in the Mainland in the past 12 months (1.5.2013 to 30.4.2014).
請填寫過去十二個月內(1.5.2013 至 30.4.2014)，調派往內地工作超過六個月的經理級、主任級及技術人員級，並從事設計及制作、營銷及編輯工作的員工人數。

14. Q.4
Whether with Company in the mainland of China?
是否在中國內地設有公司？

Please enter the total number of Mainland employees by job level (excluding those employees deployed from Hong Kong) working in the companies in the mainland of China which are under your establishment's control. Please disregard the name or ownership of such operations.
請填寫由貴機構所管理的內地公司各技能等級的中國內地僱員總數（不包括香港僱員）。請毋須理會這些公司的名稱或擁有權。

15. Q.5
Education and Training an Employee Should Have
僱員宜有的教育及訓練

The purpose of this question is to solicit your view on the education and training for which an employee in a particular job should have so that he could appreciate the technology behind his work.

(Please refer to the codes at the right of the table.)

此題目的在調查貴機構就各類職位的僱員宜具備何種教育程度及訓練以勝任其工作的意見。（請參閱該表右欄的類別編號。）

16. Q.6
Employees Left
僱員離職

Please enter the number of employees who had left your establishment in the past 12 months (1.5.2013 to 30.4.2014).

請填寫過去十二個月內(1.5.2013 至 30.4.2014)，貴機構離職的僱員人數。

17. Q.7
Recruitment
招聘

- (a) Please enter the number of new recruits in the past 12 months (1.5.2013 to 30.4.2014); and
請填寫過去十二個月內 (1.5.2013 至 30.4.2014) ，貴機構新招聘的僱員人數；及
- (b) the number of recruits who have performed publishing services related duties in their last jobs from item (a).
在上列(a)項中，在上一個工作崗位是從事出版業相關職務的人數。

18. Q.8
Difficulties Encountered in Recruitment
招聘困難

Please indicate whether your establishment encountered any difficulties in the recruitment of publishing employees in the past 12 months (1.5.2013 to 30.4.2014). If your company had no recruitment needs or had not encountered any difficulties, please go to question (10).

請填寫貴機構在過去十二個月(1.5.2013 至 30.4.2014)招聘出版業僱員時，是否遇到招聘困難？如沒有招聘需要或沒有遇上招聘困難，請跳答第 (10) 題。

19. Q.9
Major Difficulties in Recruitment
主要招聘困難

Please give the major recruitment difficulties your establishment encountered in the past 12 months (1.5.2013 to 30.4.2014). (may choose up to 3 options) (Please refer to the codes at the bottom of the table)

請說明貴機構在過去十二個月(1.5.2013 至 30.4.2014)所遇到的主要招聘困難。(最多可選三項)(請參閱該表下面的類別編號)

20. Q.10
Employees' Training Needs
僱員的訓練需求

Please fill in the types of training that your establishment will need from the course providers in the next 12 months (1.5.2013 to 30.4.2014) (including Hong Kong's transforming into a knowledge-based economy) (Please refer to the codes at the bottom of the table).

為迎合各方面的轉變(包括香港轉型至知識型經濟)，請填寫在未來十二個月(1.5.2013 至 30.4.2014)，貴機構所需要由培訓機構提供的培訓類別。(請參閱該表下面的類別編號)

21. Example

例子

To facilitate proper completion, an example is given below for your reference.

為協助閣下填表，現將例子附錄如下以供參考。

Example

例子

Part I 第一部分

(A) Job 工作			(B) Monthly Income Code	(C) No. of Employed as at 2.5.2014 (excl. trainees)	(D) Forecast of No. Employees in 12 Months' time (excl. trainees)	(E) No. of Vacancies as at 2.5.2014 (excl. trainees)	(F) No. of Trainees as at 2.5.2014	Average Monthly Income 每月平均收入
Title 職稱	Rec. Type 記錄 類型	No. 職務 編號	每月收入 編號	在2.5.2014之 現有僱員人數 (受訓者除外)	預計 在十二個月後 僱員人數 (受訓者除外)	在2.5.2014之 空缺額 (受訓者除外)	在2.5.2014之 受訓者 人數	
		8 - 10	11	12 - 15	16 - 19	20 - 22	23 - 25	Enter in column B employee's average monthly income range according to the following codes. The income should include basic wages, guaranteed year-end bonus, regular overtime pay cost of living allowance, mea allowance etc. 請將僱員的每月平均收入 幅度按照下列類別編號 填入B欄內。「每月平均 收入」包括底薪固定發放 的年終花紅、定期超時工 作工資、生活津貼、 膳食津貼等。
1 Managing Director / General Manager / Publisher / Chief Executive Director / President 董事經理 / 總經理 / 出版人 / 社長	2	1 5 1	8	1	1	0		Code 編號 Monthly Income Range 每月收入幅度 1 \$8,000 or below \$8,000 或以下 2 \$8,001 - \$10,000 3 \$10,001 - \$15,000 4 \$15,001 - \$20,000 5 \$20,001 - \$30,000 6 \$30,001 - \$45,000 7 \$45,001 - \$60,000 8 \$60,001 or above \$60,001 或以上
2 Publishing Director 總編輯 / 主編	2	1 5 2	8	1	2	1		
3 Design Director / Art Director 設計總監 / 美術總監	2	1 5 3						
4 Production Director / Production Manager 製作總監 / 製作經理	2	1 5 4						
5 Marketing Director / Marketing Manager 市場總監 / 市場經理	2	1 5 5						
6 Sales Director / Sales Manager (Newspaper and Magazine Publications) 營業總監 / 營業經理 (報刊)	2	1 5 6						
7 Sales Director / Sales Manager (Book Publications) 營業總監 / 營業經理 (書刊)	2	1 5 7						
8 Editorial Manager 編輯經理	2	1 5 8						
9 Manager (E-publishing) 電子出版經理	2	1 5 9						
10 Commissioning Editor / Acquisition Editor 策劃編輯	2	2 5 1	6	1	1	0		
11 Senior Editor 高級編輯	2	2 5 2	6	3	5	1		
12 Designer 設計師	2	2 5 3						
13 Production Supervisor 製作主任	2	2 5 4						
14 Sales Supervisor 營業主任	2	2 5 5						
15 Marketing / Publicity Supervisor 市場 / 宣傳主任	2	2 5 6						
16 Customer Services Supervisor / Officer (Books) 客戶服務主任 (書籍)	2	2 5 7						
17 Circulation Supervisor (Magazines & Newspapers) 發行主任 (報刊)	2	2 5 8						
18 Supervisor (E-publishing) 電子出版主任	2	2 5 9						
19 Assistant Editor / Copy Editor / Art Editor / Proof Reader 助理編輯 / 稿件編輯 / 美術編輯 / 校對員	2	3 5 1						
20 Art Designer 美術設計員	2	3 5 2						
21 Illustrator 插圖員	2	3 5 3						
22 Desktop Publishing (DTP) / E-publishing Technician 桌面排版 / 電子出版操作員	2	3 5 4						
23 Production Assistant 製作助理	2	3 5 5						
24 Sales Representative / Sales Executive 營業代表 / 營業主任	2	3 5 6						
25 Marketing / Publicity Assistant 市場助理 / 宣傳助理	2	3 5 7						
26	2							
27	2							
28	2							

Note 1: If additional lines are necessary, please tick here and enter on supplementary sheets
附註一: 如此頁已填滿，請先將 (✓) 號填入此 內，然後在附頁繼續填寫。

Note 2: The term "trainees" includes all trainees receiving any form of training and apprentices under a contract of apprenticeship
附註二: 「受訓者」包括正在接受各種訓練的人士，以及簽有學徒合約的登記學徒。

Job Descriptions for Principal Jobs in Publishing Industry

出版業主要職務工作說明

Code No. 編號	Job Title 職稱	Job Description 工作說明
MANAGERIAL LEVEL 經理級		
151	Managing Director / General Manager / Publisher / Chief Executive Director / President 董事經理／總經理／出版人／ 社長	Responsible for policy formulation, developing policy and strategy for E-publishing business and the profitable operation of the company. Develops and recommends strategic objectives. Plans, budgets, organises, directs and controls, edits publishing, and promotes sales activities. 制定有助公司利潤的業務方針；訂立業務目標；發展電子出版業務之政策和策略；制定計劃和預算，籌劃、管理及督導、編輯出版及營銷業務。
152	Editorial Director / Chief Editor / Managing Editor / Publishing Director 總編輯／主編	Responsible for editorial policy and standards, departmental organisation and procedures, the profitability of new publications, authors' royalty policy and legal implications especially copy-right. Co-ordinates editorial and research activities with production, design and marketing departments, and monitors schedules of E-publishing business. 制定編輯政策及標準，管理部門組織及出版程序，負責研究新刊物的盈利以及作者的版稅和法律問題，例如版權；協調編輯、市場調查、製作、設計、市場推廣等部門的工作，及監察電子出版業務之進度。
153	Design Director / Art Director 設計總監／美術總監	Responsible for design standards, departmental organisation and procedures. Co-ordinates and supervises freelance work. 負責設計標準、部門組織及工作程序，協調及管理外判的工作。
154	Production Director / Production Manager 製作總監／製作經理	Responsible for production standards, departmental organisation and procedures. Supervises purchasing; assesses new suppliers and materials. Checks estimates, and monitors schedules and costs. 負責製作標準、部門組織及工作程序；管理採購事宜，評估新供應商及物料；核對估價，監察進度和成本。
155	Marketing Director / Marketing Manager 市場總監／市場經理	Responsible for marketing policy, departmental organisation and procedures. Prepares sales forecasts, conducts market research; supervises sales, publicity and marketing services activities. Develops local and overseas markets; sells subsidiary rights and markets books produced by other publishers for whom the company acts as agent. 負責市場推廣政策、部門組織及工作程序；草擬銷量預測，進行市場調查，督導銷售、宣傳及市場服務等工作；拓展本地及海外市場，推銷代理權，銷售公司代理的書籍。

Code No. 編號	Job Title 職 稱	Job Description 工作說明
MANAGERIAL LEVEL (Continued) 經理級 (續)		
156	Sales Director / Sales Manager (Newspaper and Magazine Publications) 營業總監／營業經理（報刊）	Develops the sales of a magazine's advertising space. 主理雜誌廣告位的銷售。
157	Sales Director / Sales Manager (Book Publications) 營業總監／營業經理監事（書刊）	Develops the publishing activities and logistic management. 主理出版業務及物流倉存管理
158	Editorial Manager 編輯經理	Responsible for implementing the publishing plans. Supervises the writers and editors to complete the script writing and editing works. 負責落實出版計劃、督導作者及編輯人員，完成稿件的撰審及編輯工作。
159	Manager (E-publishing) 電子出版經理	Responsible for implementing the policy and strategy for E-publishing business and monitoring schedules of the business. 負責發展電子出版業務之政策和策略，及監察該業務之進度。
SUPERVISORY LEVEL 主任級		
251	Commissioning Editor / Acquisition Editor 策劃編輯	Responsible for the development of E-publishing content. Plans article topics, commissions authors, assesses projects and liaises with authors. Draws up overall magazine contents. Prepares design and production briefs. Monitors publishing schedules. Briefs marketing department. 負責執行電子出版內容。策劃選題，聘請作者，評估計劃，與作者聯絡；概括定出刊物的內容；草擬設計及製作摘要；監察出版進度；指示市場推廣部門。
252	Senior Editor 高級編輯	Responsible for verifying and checking of different kinds of text books and magazines and supervises the making up work repeatedly in the process of preparing the script including translation, proofreading etc. 負責審核及編輯不同書籍及刊物的工作，並跟進稿件在製作過程中的工作，包括翻譯及校對工作等。
253	Designer 設計師	Responsible for design specifications for individual books and magazines. Commissions illustrations and photographs. Marks up typescript for prepress and prepares rough page layouts and cover/jacket artwork. Prepares design work on publicity brochures and web page design. 負責不同書籍或刊物的設計；安排製作插圖及照片；審閱稿件及加上指示以便排版，製備粗略的內頁版樣構想和封頁的美術稿；負責宣傳品的美術設計及互聯網網頁設計。

Code No. 編號	Job Title 職 稱	Job Description 工作說明
SUPERVISORY LEVEL (Continued) 主任級 (續)		
254	Production Supervisor 製作主任	Prepares estimates and production schedules. Monitors quality control. Chooses suppliers and places orders. Supervises colour separation, typesetting and printing / binding suppliers. Maintains schedules and keeps costs within estimates. 製備預算和製作進度表；控制品質；選擇適合的供應商，訂購物料；督導版面製作和印刷／裝訂工作；使製作符合進度，保持支出在預算內。
255	Sales Supervisor 營業主任	Organises and supervises the sales force. 組織推銷工作和督導推銷及客戶聯繫。
256	Marketing / Publicity Supervisor 市場／宣傳主任	Prepares and distributes catalogues and other general lists. Plans and executes promotional campaigns for individual titles or group of titles including advertising, direct mail campaigns, point-of-sale material. Organises exhibitions and supervises inspection copy service. 製備和分發圖書目錄及宣傳品；策劃和執行出版物的宣傳活動，包括刊登廣告、郵寄網上宣傳、現場售賣刊物；籌辦展覽會及安排書刊試閱服務。
257	Customer Services Supervisor / Officer (Books) 客戶服務主任（書籍）	Plans and controls customer services including enquiries and customer records. 策劃和管理客戶服務，包括查詢服務和客戶記錄。
258	Circulation Supervisor (Magazines & Newspapers) 發行主任（報刊）	Responsible for the distribution of the publication locally and, where necessary, overseas. 負責刊物在本地或海外的發行事宜。
259	Supervisor (E-publishing) 電子出版主任	Responsible for the implementation of E-publishing business. 負責執行電子出版業務。
TECHNICAL STAFF LEVEL 技術人員級		
351	Assistant Editor / Copy Editor / Art Editor / Proof Reader 助理編輯／稿件編輯／美術編輯／校對員	Checks typescripts and suggests improvements, handles photo research, copyright clearance. Checks proofs, dummies, artwork, blueprints. 核對稿件和提出改進建議；處理照片及版權許可事宜；校對版樣、美術稿和藍圖。
352	Art Designer 美術設計員	Designs graphic art work and web page including using of CAD system. 製備美術正稿及網頁，包括採用電腦設備。

Code No. 編號	Job Title 職 稱	Job Description 工作說明
TECHNICAL STAFF LEVEL (Continued) 技術人員級 (續)		
353	Illustrator 插圖員	Produces illustrative drawings, charts, and diagrams applied to all parts of a book, adding interesting images to the overall visual presentation, and further enhances the readability and clarity of book content. 為書中各部分，製作合適的插圖、圖表及圖解，以求透過有趣的圖像，增強全書的整體視覺效果，使內容更清晰，並進一步提高全書的可讀性。
354	Desktop Publishing (DTP) / E-publishing Technician 桌面排版 / 電子出版操作員	Inputs and processes data, edits text and illustrations on desktop publishing terminal; operates computer output devices for both print and E-publishing platforms. 在電腦桌面排版系統輸入及處理資料，編輯內文，圖像處理；操作電腦輸出設備，供紙張印刷及電子出版平台。
355	Production Assistant 製作助理	Assists in the production of books and magazines. 協助書本和雜誌的印製事宜。
356	Sales Representative / Sales Executive 營業代表 / 營業主任	Visits bookshops, schools and other organisations to promote sales. 往書店、學校及其他銷售渠道推銷刊物。
357	Marketing / Publicity Assistant 市務助理 / 宣傳助理	Assists with publicity and customer services operations. 協助宣傳及客戶服務等工作。

Appendix 5: MANPOWER STATISTICS IN THE PRINTING INDUSTRY

附錄 5：印刷業人力統計數字

Job Title 職稱	Number of Employees Employed 現有僱員人數	Number of Trainees 受訓者 人數	Number of Vacancies at Date of Survey 調查期間 的空缺額	Forecast Number of Employees by May 2015 估計到2015 年5月時的 僱員人數
TECHNOLOGIST / MANAGERIAL LEVEL 技師／管理級				
General Manager 總經理	363	1	-	363
Production/Quality Manager 生產經理／廠務經理／ 品質經理	346	2	-	346
Sales / Customer Services / Marketing Manager 營業／客戶服務／市場推廣 經理	650	1	1	652
Procurement Manager 採購經理	32	-	-	32
Information Technology Manager (Printing) 資訊科技經理 (印刷)	19	-	-	20
Sub-total 小計	1 410	4	1	1 413
TECHNICIAN / SUPERVISORY LEVEL 技術員／督導級				
Cost Estimator 印刷估價員	268	1	-	268
Production Planner / Production Controller / Quality Controller 生產策劃員／生產管制員／ 品質管制員	589	2	2	591
Sales Representative 營業代表	4 167	5	36	4 225
Overseer/Supervisor 督導員／管理員	400	1	2	402
Electrical & Mechanical Maintenance Technician (Printing) 機電維修 (印刷) 技術員	297	-	2	298
Designer/Design Officer 設計員/設計主任	470	-	25	497
Prepress Technician 印前技術員	838	4	4	843
Purchasing Officer/Controller 印刷物料採購員/控制員	103	-	1	104

Job Title 職稱	Number of Employees Employed 現有僱員人數	Number of Trainees 受訓者 人數	Number of Vacancies at Date of Survey 調查期間 的空缺額	Forecast Number of Employees by May 2015 估計到2015 年5月時的 僱員人數
TECHNICIAN / SUPERVISORY LEVEL (Continued) 技術員／督導級 (續)				
Technical Services/Products (Printing) Technician 技術/產品(印刷)技術員	102	-	-	102
Information Technology (Printing) Technician 資訊科技(印刷)技術員	70	-	1	71
Assistant Editor 助理編輯	11	-	3	14
Sub-total 小計	7 315	13	76	7 415
CRAFTSMAN LEVEL 技工級				
Electronic Prepress System Craftsman 電子印前系統操作技工	606	-	2	608
Offset Lithographic Platemaker 柯式版製作技工	602	1	-	603
Digital Printing System Craftsman 數碼印刷系統操作技工	699	8	10	712
Printing Machine Craftsman (Offset Litho) (Sheet-fed) 單張給紙式柯式平版機 印刷技工	2 886	1	66	2 932
Printing Machine Craftsman (Offset Litho) (Web-fed) 捲筒給紙式柯式平版機 印刷技工	673	1	21	695
Other Printing Machine Craftsman 其他印刷機械技工	489	-	21	510
Binding Craftsman 裝訂技工	1 027	4	39	1 066
Die Cutting / Tool Making Craftsman 啤盒工／造模工	294	-	17	311
Package Finishing Machine Craftsman 包裝盒完成機技工	141	-	7	148
Other Print Finishing Craftsman 其他印後機械技工	354	-	18	366
Sub-total 小計	7 771	15	201	7 951
UNSKILLED LEVEL 非技術人員級				
General Worker 雜工	1 194	-	44	1 231
Sub-total 小計	1 194	-	44	1 231
GRAND TOTAL 總計	17 690	32	322	18 010

Appendix 6: MANPOWER STATISTICS IN THE PUBLISHING INDUSTRY

附錄 6：出版業人力統計數字

Job Title 職稱	Number of Employees Employed 現有僱員人數	Number of Trainees 受訓者人數	Number of Vacancies at Date of Survey 調查期間 的空缺額	Forecast Number of Employees by May 2015 估計到2015 年5月時的 僱員人數
MANAGERIAL LEVEL 經理級				
Managing Director/ General Manager/Publisher/ Chief Executive Director/President 董事經理／總經理／ 出版人／社長	368	-	-	368
Editorial Director/Chief Editor/ Managing Editor/Publishing Director 總編輯／主編	333	-	-	333
Design Director/Art Director 設計總監／美術總監	172	-	-	172
Production Director/ Production Manager 製作總監／製作經理	109	-	-	109
Marketing Director/ Marketing Manager 市場總監／市場經理	268	-	-	268
Sales Director/Sales Manager (Newspaper and Magazine Publications) 營業總監／營業經理（報刊）	197	-	3	200
Sales Director/Sales Manager (Book Publications) 營業總監／營業經理監事（書刊）	101	-	-	101
Editorial Manager 編輯經理	135	-	-	135
Manager (E-publishing) 電子出版經理	26	-	-	26
Sub-total 小計	1 709	-	3	1 712
SUPERVISORY LEVEL 主任級				
Commissioning Editor/ Acquisition Editor 策劃編輯	151	-	-	151
Senior Editor 高級編輯	820	-	8	828

Job Title 職稱	Number of Employees Employed 現有僱員人數	Number of Trainees 受訓者人數	Number of Vacancies at Date of Survey 調查期間的空缺額	Forecast Number of Employees by May 2015 估計到2015年5月時的僱員人數
SUPERVISORY LEVEL (Continued) 主任級 (續)				
Designer 設計師	446	-	6	452
Production Supervisor 製作主任	151	-	-	151
Sales Supervisor 營業主任	388	-	4	392
Marketing/Publicity Supervisor 市場/宣傳主任	286	-	56	342
Customer Services Supervisor/ Officer (Books) 客戶服務主任 (書籍)	53	-	-	53
Circulation Supervisor (Magazine & Newspapers) 發行主任 (報刊)	187	-	-	187
Supervisor (E-publishing) 電子出版主任	70	-	-	70
Sub-total 小計	2 552	-	74	2 626
TECHNICAL STAFF LEVEL 技術人員級				
Assistant Editor/Copy Editor/ Art Editor/Proof Reader 助理編輯/稿件編輯/ 美術編輯/校對員	2 719	62	61	2 844
Art Designer 美術設計員	672	-	8	680
Illustrator 插圖員	204	-	3	207
Desktop Publishing (DTP) Operator 桌面排版操作員	712	-	-	712
Production Assistant 製作助理	287	-	-	287
Sales Representative/ Sales Executive 營業代表/營業主任	1 120	1	26	1 146
Marketing/Publicity Assistant 市務助理/宣傳助理	656	-	6	662

Job Title 職稱	Number of Employees Employed 現有僱員人數	Number of Trainees 受訓者人數	Number of Vacancies at Date of Survey 調查期間的空缺額	Forecast Number of Employees by May 2015 估計到2015年5月時的僱員人數
TECHNICAL STAFF LEVEL 技術人員級 (續)				
Other Publishing Related Jobs (Programmer and Designer/ Cartographer) 其他出版業有關職位 (電腦程式編 寫員及設計/繪圖員)	18	-	-	18
Sub-total 小計	6 388	63	104	6 556
GRAND TOTAL 總計	10 649	63	181	10 894

Appendix 7 : PREFERRED EDUCATION OF EMPLOYEES IN THE PRINTING INDUSTRY

附錄7：印刷業僱員宜有教育程度

Job Level 技能等級	University Degree or Above 大學學位 或以上	Higher Diploma/ Associate Degree 高級文憑/ 副學士	Diploma/ Higher Certificate 文憑/ 高級證書	Certificate/ Secondary 4 to 7/ Hong Kong Diploma of Secondary Education or equivalent 證書/ 中四至 中七程度/ 香港中學文 憑或同等學 歷	Craft Certificate/ Secondary 3 or below 技工證書/ 中五以下 程度	Unspecified 未列明者	Total Number of Employees 總計
Technologist/ Managerial 技師／管理	401	211	494	121	21	162	1 410
Technician/ Supervisory 技術員／督導	302	540	1 778	3 925	134	625	7 304
Craftsman 技工	-	14	338	2 391	4 256	783	7 782
Total Number of Employees 總計	703	765	2 610	6 437	4 411	1 570	16 496

Appendix 8: PREFERRED EDUCATION OF EMPLOYEES IN THE PUBLISHING INDUSTRY
 附錄8：出版業僱員宜有教育程度

Job Level 技能等級	University Degree or Above 大學學位或以上	Higher Diploma/ Associate Degree 高級文憑/副學士	Diploma/ Higher Certificate 文憑/高級證書	Certificate/ Secondary 4 to 7/ Hong Kong Diploma of Secondary Education or equivalent 證書/中四至中七程度/香港中學文憑或同等學歷	Craft Certificate/ Secondary 3 or below 技工證書/中五以下程度	Unspecified 未列明者	Total Number of Employees 總計
Managerial 經理	1 344	41	10	2	-	312	1 709
Supervisory 主任	1 355	443	273	73	-	428	2 552
Technical Staff 技術人員	1 578	889	1 599	1 158	12	1 152	6 388
Total 總計	4 257	1 373	1 882	1 233	12	1 892	10 649

Appendix 9 : PREFERRED TRAINING PERIOD OF EMPLOYEES
IN THE PRINTING INDUSTRY

附錄9：印刷業僱員宜有訓練期

Job Level 技能等級	4 Years or Above 四年或 以上	3 to Less Than 4 Years 三年至 四年以下	2 to Less Than 3 Years 二年至 三年以下	1 to Less Than 2 Years 一年至 二年 以下	6 to Less Than 12 Months 六至 十二個月 以下	Below 6 Months 六個月 以下	Unspecified 未列明者	Total Number of Employees 總計
Technologist/ Managerial 技師／管理	618	338	292	5	-	-	157	1 410
Technician/ Supervisory 技術員／ 督導	640	1 169	2 662	2 182	26	-	625	7 304
Craftsman 技工	147	303	1 568	3 874	1 005	78	807	7 782
Total 總計	1 405	1 810	4 522	6 061	1 031	78	1 589	16 496

Appendix 10: **PREFERRED TRAINING PERIOD OF EMPLOYEES
IN THE PUBLISHING INDUSTRY**

附錄10：出版業僱員宜有訓練期

Job Level 技能等級	4 Years or Above 四年 或以上	3 to Less Than 4 Years 三至 四年 以下	2 to Less Than 3 Years 二至 三年 以下	1 to Less Than 2 Years 一至 二年 以下	6 to Less Than 12 Months 六至 十二個月 以下	Below 6 Months 六個月 以下	Unspecified 未有說明	Total Number of Employees 總計
Managerial 經理	944	336	99	16	2	-	312	1 709
Supervisory 主任	432	641	975	74	2	-	428	2 552
Technical Staff 技術人員	52	168	3 471	1 205	235	105	1 152	6 388
Total 總計	1 428	1 145	4 545	1 295	239	105	1 892	10 649

Appendix 11 : PREFERRED TRAINING MODE OF EMPLOYEES
IN THE PRINTING INDUSTRY

附錄11：印刷業僱員宜有訓練形式

Job Level 技能等級	On-the-Job Training 在職訓練	Apprenticeship 學徒訓練	Others 其他	Unspecified 未列明者	Total Number of Employees 總計
Technologist/ Managerial 技師／管理	1 253	-	23	134	1 410
Technician/ Supervisory 技術員／督導	6 679	-	563	62	7 304
Craftsman 技工	6 522	477	148	635	7 782
Total 總計	14 454	477	233	1 332	16 496

Appendix 12 : PREFERRED TRAINING MODE OF EMPLOYEES
IN THE PUBLISHING INDUSTRY

附錄12：出版業僱員宜有訓練形式

Job Level 技能等級	On-the-Job Training 在職訓練	Apprenticeship 學徒訓練	Others 其他	Unspecified 未列明者	Total Number of Employees 總計
Managerial 經理	1 394	-	3	312	1 709
Supervisory 主任	2 119	-	5	428	2 552
Technical Staff 技術人員	5 232	-	4	1 152	6 388
Total 總計	8 745	-	12	1 892	10 649

Appendix 13: DISTRIBUTION OF EMPLOYEES BY MONTHLY INCOME RANGE
IN THE PRINTING INDUSTRY

附錄13：印刷業僱員每月收入分布情況

Job 職稱	\$8,000 or below 或以下	\$8,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$30,000	\$30,001 - \$45,000	\$45,001 - \$60,000	\$60,001 or Above 或以上	Unspecified 未列明者	Total 總計
TECHNOLOGIST/MANAGERIAL LEVEL 技師／管理級										
General Manager 總經理	-	1	-	16	90	107	36	31	82	363
Production/ Quality Manager 生產經理／廠務經理／ 品質經理	-	-	18	37	92	115	17	5	62	346
Sales/ Customer Services/ Marketing Manager 營業／客戶服務／ 市場推廣經理	-	-	3	36	287	183	24	7	110	650
Procurement Manager 採購經理	-	-	2	-	20	6	-	2	2	32
Information Technology Manager (Printing) 資訊科技經理 (印刷)	-	-	1	-	9	4	-	3	2	19
Sub-total 小計	-	1	24	89	498	415	77	48	258	1 410
TECHNICIAN/SUPERVISORY LEVEL 技術員／督導級										
Cost Estimator 印刷估價員	-	-	68	126	29	20	-	-	25	268
Production Planner / Production Controller / Quality Controller 生產策劃員／生產管制員／ 品質管制員	6	11	94	300	83	27	1	-	67	589
Sales Representative 營業代表	26	213	1 742	1 259	327	32	9	4	555	4 167
Overseer/ Supervisor 督導員／管理員	-	2	72	170	106	10	4	-	36	400
Electrical & Mechanical Maintenance Technician (Printing) 機電維修 (印刷) 技術員	-	-	25	228	6	2	-	-	36	297
Designer/Design Officer 設計員／設計主任	-	-	100	299	43	4	-	-	24	470
Prepress Technician 印前技術員	-	9	376	325	32	-	-	-	96	838
Purchasing Officer/Controller 印刷物料採購員／控制員	-	1	47	24	9	2	-	-	20	103
Technical Services/Products (Printing) Technician 技術／產品(印刷)技術員	-	-	17	5	20	-	-	-	60	102
Information Technology (Printing) Technician 資訊科技(印刷)技術員	-	-	4	13	27	3	-	-	23	70
Assistant Editor 助理編輯	-	-	-	11	-	-	-	-	-	11
Sub-total 小計	32	236	2 545	2 760	682	100	14	4	942	7 315

Job 職稱	\$8,000 or below 或以下	\$8,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$30,000	\$30,001 - \$45,000	\$45,001 - \$60,000	\$60,001 or Above 或以上	Unspecified 未列明者	Total 總計
CRAFTSMAN LEVEL 技工級										
Electronic Prepress System Craftsman 電子印前系統操作技工	-	38	336	137	-	-	-	-	95	606
Offset Lithographic Platemaker 柯式版製作技工	-	16	402	58	1	-	-	-	125	602
Digital Printing System Craftsman 數碼印刷系統操作技工	20	73	495	33	11	-	-	-	67	699
Printing Machine Craftsman (Offset Litho) (Sheet-fed) 單張給紙式柯式平版機 印刷技工	-	230	1 939	473	49	-	-	-	195	2 886
Printing Machine Craftsman (Offset Litho) (Web-fed) 捲筒給紙式柯式平版機 印刷技工	-	-	456	71	4	-	-	-	142	673
Other Printing Machine Craftsman 其他印刷機械及包裝印刷操 作技工	20	64	229	32	-	-	-	-	144	489
Binding Craftsman 裝訂技工	-	213	671	97	-	-	-	-	46	1 027
Die Cutting / Tool Making Craftsman 啤盒工／造模工	7	64	184	14	-	-	-	-	25	294
Package Finishing Machine Craftsman 包裝盒完成機技工	-	31	72	10	-	-	-	-	28	141
Other Print Finishing Craftsman 其他印後機械技工	4	73	227	34	-	-	-	-	16	354
Sub-total 小計	51	802	5 011	959	65	-	-	-	883	7 771
UNSKILLED LEVEL 非技術人員級										
General Worker 雜工	128	668	181	-	-	-	-	-	217	1 194
Sub-total 小計	128	668	181	-	-	-	-	-	217	1 194
GRAND TOTAL 總計	211	1 707	7 761	3 808	1 245	515	91	52	2 300	17 690

Appendix 14 : DISTRIBUTION OF EMPLOYEES BY MONTHLY INCOME RANGE
IN THE PUBLISHING INDUSTRY

附錄14：出版業僱員每月收入分布情況

Job 職稱	\$8,000 or below 或以下	\$8,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$30,000	\$30,001 - \$45,000	\$45,001 - \$60,000	\$60,001 or Above 或以上	Unspecified 未列明者	Total 總計
MANAGERIAL LEVEL 經理級										
Managing Director/ General Manager/ Publisher/Chief Executive Director/ President 董事經理／總經理／出版人／ 社長	56	-	-	6	12	90	70	52	82	368
Editorial Director/ Chief Editor/ Managing Editor/ Publishing Director 總編輯／主編	-	-	-	2	12	90	106	31	92	333
Design Director/ Art Director 設計總監／美術總監	-	-	-	2	2	72	11	4	81	172
Production Director/ Production Manager 製作總監／製作經理	-	-	-	20	1	28	17	3	40	109
Marketing Director/ Marketing Manager 市場總監／市場經理	-	-	-	10	28	127	19	3	81	268
Sales Director/Sales Manager (Newspaper and Magazine Publications) 營業總監／營業經理（報刊）	-	-	-	-	28	58	25	5	81	197
Sales Director/ Sales Manager (Book Publications) 營業總監／營業經理監事 （書刊）	-	-	-	-	7	30	19	2	43	101
Editorial Manager 編輯經理	-	-	-	-	6	62	3	2	62	135
Manager (E-publishing) 電子出版經理	-	-	-	-	3	20	2	-	1	26
Sub-total 小計	56	-	-	40	99	577	272	102	563	1 709
SUPERVISORY LEVEL 主任級										
Commissioning ditor/ Acquisition Editor 策劃編輯	-	-	-	9	77	20	28	-	17	151
Senior Editor 高級編輯	-	-	-	39	453	105	2	6	215	820
Designer 設計師	-	-	-	189	120	6	-	-	131	446
Production Supervisor 製作主任	-	-	-	32	39	10	-	-	70	151
Sales Supervisor 營業主任	-	3	3	107	79	88	13	-	95	388
Marketing/ Publicity Supervisor 市場／宣傳主任	-	-	3	95	66	38	-	-	84	286
Customer Services Supervisor/Officer (Books) 客戶服務主任（書籍）	-	-	8	23	10	-	-	-	12	53
Circulation Supervisor (Magazine & Newspapers) 發行主任（報刊）	-	4	3	53	46	-	-	-	81	187
Supervisor (E-publishing) 電子出版主任	-	-	-	23	38	4	-	-	5	70
Sub-total 小計	-	7	17	570	928	271	43	6	710	2 552

Job 職稱	\$8,000 or below 或以下	\$8,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$30,000	\$30,001 - \$45,000	\$45,001 - \$60,000	\$60,001 or Above 或以上	Unspecified 未列明者	Total 總計
TECHNICAL STAFF LEVEL 技術人員級										
Assistant Editor/ Copy Editor/ Art Editor/ Proof Reader 助理編輯／稿件編輯／ 美術編輯／校對員	-	28	929	1 008	36	-	-	-	718	2 719
Art Designer 美術設計員	-	2	134	245	57	-	-	-	234	672
Illustrator 插圖員	-	30	24	70	5	-	-	-	75	204
Desktop Publishing (DTP) Operator 桌面排版操作員	-	9	228	312	17	-	-	-	146	712
Production Assistant 製作助理	-	-	77	31	8	-	-	-	171	287
Sales Representative/ Sales Executive 營業代表／營業主任	-	55	234	389	128	-	-	-	314	1 120
Marketing/Publicity Assistant 市務助理／宣傳助理	-	16	168	181	24	-	-	-	267	656
Other Publishing Related Jobs (Programmer and Designer/ Cartographer) 其他出版業有關職位(電腦程式 編寫員及設計／繪圖員)	-	-	-	-	18	-	-	-	-	18
Sub-total 小計	-	140	1 794	2 236	293	-	-	-	1 925	6 388
GRAND TOTAL 總計	56	147	1 811	2 846	1 320	848	315	108	3 198	10 649

Appendix 15: EMPLOYEES' TRAINING NEEDS (ALL SECTORS) (PRINTING)

附錄15：僱員所需訓練（印刷業各門類）

Job Title 職稱	Training Needs Priority and No. of Employees 僱員人數											
	Technologist/Managerial 技師／管理				Technician/Supervisory 技術員／督導				Craftsman 技工			
	1 st	2 nd	3 rd	Total	1 st	2 nd	3 rd	Total	1 st	2 nd	3 rd	Total
Management Skills 管理技能												
Production Management 製作管理	48	4	17	69	81	14	2	97	62	-	-	62
Quality Management 品質管理	22	13	7	42	21	19	1	42	-	62	-	62
Marketing Management 經銷管理	39	45	3	87	15	76	2	93	-	-	-	-
Customer Services 客戶服務	24	24	9	57	99	13	63	175	-	1	-	1
Other Management Skills 其他管理技能	1	1	3	5	1	-	3	4	-	-	-	-
China-related Knowledge 有關中國的知識												
Trade and Industry Environment in Mainland China 在中國內地的行業及營商常規	-	3	-	3	13	14	-	27	-	-	-	-
Other China related Knowledge 其他有關中國的知識	-	1	-	1	-	-	-	-	-	-	-	-
IT Skills 資訊科技的技能												
Computer Graphics and Webpage 電腦圖像處理與網頁設計	2	-	-	2	25	3	1	29	22	-	3	25
E-commerce Knowledge and Applications 電子商貿的知識及應用	-	-	-	-	-	-	-	-	-	6	-	6

Job Title 職稱	Training Needs Priority and No. of Employees 僱員人數											
	Technologist/Managerial 技師／管理				Technician/Supervisory 技術員／督導				Craftsman 技工			
	1 st	2 nd	3 rd	Total	1 st	2 nd	3 rd	Total	1 st	2 nd	3 rd	Total
Media Technology 媒體科技	-	1	1	2	3	3	-	6	5	13	7	25
Other IT Skills 其他資訊科技的技能	-	-	-	-	-	-	8	8	-	-	8	8
Language Skills 語文技能												
Spoken English 英語會話	3	-	1	4	2	19	-	21	-	-	-	-
Putonghua 普通話	-	-	14	14	29	2	15	46	-	-	-	-
Industry Specific Skills 業內專業技能												
Pre-press Technique 印前技術	2	-	-	2	99	25	1	125	68	2	-	70
Printing Technique 印刷技術	-	1	1	2	9	5	1	15	110	44	13	167
Post-printing Technique 印後技術	-	-	-	-	-	2	1	3	1	6	32	39
Production Coordination and Project Management 生產協調及項目管理	4	3	3	10	10	4	4	18	-	5	1	6
Estimation and Costing 估價及成本	13	4	3	20	27	57	5	89	-	-	-	-
Repair and Maintenance 機械維修及保養	-	-	-	-	2	4	4	10	-	10	4	14
Colour Management 色彩管理	-	4	2	6	22	42	20	84	3	32	-	35
Products Structure 產品結構	1	-	-	1	3	-	1	4	-	3	-	3
Materials Application 物料應用	1	3	-	4	1	2	3	6	-	1	1	2
Quality Assurance 品質保證	1	13	11	25	-	20	6	26	2	2	13	17

Appendix 16 : EMPLOYEES' TRAINING NEEDS (ALL SECTORS) (PUBLISHING)

附錄16：僱員所需訓練（出版業各門類）

Job Title 職稱	Training Needs Priority and No. of Employees 僱員人數											
	Managerial 經理				Supervisory 主任				Technical Staff 技術人員			
	1 st	2 nd	3 rd	Total	1 st	2 nd	3 rd	Total	1 st	2 nd	3 rd	Total
Management Skills 管理技能												
Production Management 製作管理	39	4	5	48	2	-	-	2	-	-	-	-
Quality Management 品質管理	-	38	6	44	2	-	-	2	-	-	-	-
Marketing Management 經銷管理	25	29	31	85	1	-	-	1	-	-	-	-
Customer Services 客戶服務	29	7	5	41	3	1	5	9	-	1	-	1
Other Management Skills 其他管理技巧	1	-	-	1	-	-	-	-	-	-	-	-
China-related Knowledge 有關中國的知識												
Law and regulatory restrictions for access to China's market 進入中國市場的法律和經濟發展	8	1	-	9	8	-	-	8	1	28	-	29
Trade and industry environment in Mainland of China 在中國內地的行業及營商常規	1	5	-	6	6	4	-	10	28	2	-	30
IT Skills 資訊科技的技能												
Computer Graphics and Webpage 電腦圖像處理與網頁設計	-	-	-	-	1	2	-	3	43	35	7	85

Job Title 職稱	Training Needs Priority and No. of Employees 僱員人數											
	Managerial 經理				Supervisory 主任				Technical Staff 技術人員			
	1 st	2 nd	3 rd	Total	1 st	2 nd	3 rd	Total	1 st	2 nd	3 rd	Total
E-commerce Knowledge and Applications 電子商貿的知識及應用	1	7	5	13	3	6	5	14	1	15	5	21
Media Technology 媒體科技	36	7	3	46	15	7	1	23	73	42	9	124
Other IT Skills 其他資訊科技的技能	2	-	-	2	2	-	1	3	2	-	1	3
Language Skills 語文技能												
Spoken English 英語會話	-	-	2	2	-	2	4	6	-	3	12	15
Putonghua 普通話	-	-	-	-	-	-	2	2	-	-	3	3
Industry Specific Skills 業內專業技能												
Editing 編輯	-	-	-	-	19	1	2	22	78	2	-	80
Artwork/ Design 稿件設計	-	29	-	29	28	7	8	43	2	50	33	85
Publishing production 出版製作	1	-	29	30	1	12	2	15	7	6	34	47
Marketing 市場推廣	-	-	2	2	5	7	-	12	8	1	7	16
Sales and customer service 銷售及客戶服務	2	1	-	3	8	10	2	20	25	6	30	61
Logistics 物流	-	1	-	1	-	-	2	2	-	2	1	3

**FORECAST ANNUAL ADDITIONAL SKILLS DEMAND
BETWEEN 2015 AND 2017 IN THE PRINTING INDUSTRY**

預測 2015 至 2017 年間印刷業
技術人員的需求數目

Job Title 職稱	Number of Workers at Time of Survey 調查期間 僱員人數	Forecast Annual Additional Skills Demand between 2015 and 2017 預測 2015 至 2017 年每年 技術人員的 需求數目
TECHNOLOGIST/MANAGERIAL LEVEL 技師／管理級		
General Manager 總經理	363	19 – 24
Production/Quality Manager 生產經理／廠務經理／ 品質經理	346	18 – 23
Sales / Customer Services / Marketing Manager 營業／客戶服務／ 市場推廣經理	650	35 – 43
Procurement Manager 採購經理	32	2
Information Technology Manager (Printing) 資訊科技經理 (印刷)	19	1
Sub-total 小計	1 410	75 – 93
TECHNICIAN/SUPERVISORY LEVEL 技術員／督導級		
Cost Estimator 印刷估價員	268	8 – 9
Production Planner / Production Controller / Quality Controller 生產策劃員／生產管制員／ 品質管制員	600	18 – 20
Sales Representative 營業代表	4 167	126 – 129
Overseer/Supervisor 督導員／管理員	400	12 – 14
Electrical & Mechanical Maintenance Technician (Printing) 機電維修 (印刷) 技術員	297	9 -10
Designer/Design Officer 設計員／設計主任	470	14 – 16
Prepress Technician 印前技術員	838	25 – 28

Job Title 職稱	Number of Workers at Time of Survey 調查期間 僱員人數	Forecast Annual Additional Skills Demand between 2015 and 2017 預測 2015 至 2017 年每年 技術人員的 需求數目
Purchasing Officer/Controller 印刷物料採購員／控制員	103	3
Technical Services/Products (Printing) Technician 技術／產品（印刷）技術員	102	3
Information Technology (Printing) Technician 資訊科技（印刷）技術員	70	2
Sub-total 小計	7 315	200 – 244
CRAFTSMAN LEVEL 技工級		
Electronic Prepress System Craftsman 電子印前系統操作技工	606	17 – 21
Offset Lithographic Platemaker 柯式版製作技工	602	17 – 21
Digital Printing System Craftsman 數碼印刷系統操作技工	699	19 – 24
Printing Machine Craftsman (Offset Litho) (Sheet-fed) 單張給紙式柯式平版機 印刷技工	2 886	80 – 98
Printing Machine Craftsman (Offset Litho) (Web-fed) 捲筒給紙式柯式平版機 印刷技工	673	19 – 23
Other Printing Machine Craftsman 其他印刷機械技工	489	14 – 15
Binding Craftsman 裝訂技工	1 027	28 – 35
Die Cutting / Tool Making Craftsman 啤盒工／造模工	294	8 – 10
Package Finishing Machine Craftsman 包裝盒完成機技工	141	4 – 5
Other Print Finishing Craftsman 其他印後機械技工	354	10 – 12
Sub-total 小計	7 771	216 – 264

**FORECAST ANNUAL ADDITIONAL SKILLS DEMAND
BETWEEN 2015 AND 2017 IN THE PUBLISHING INDUSTRY**

預測 2015 至 2017 年間出版業
技術人員的需求數目

Job Title 職稱	Number of Workers at Time of Survey 調查期間 僱員人數	Forecast Annual Additional Skills Demand between 2015 and 2017 預測 2015 至 2017 年每年 技術人員的 需求數目
MANAGERIAL LEVEL 經理級		
Managing Director/ General Manager/Publisher/ Chief Executive Director/ President 董事經理／總經理／ 出版人／社長	368	12 – 15
Editorial Director/Chief Editor/ Managing Editor/Publishing Director 總編輯／主編	333	11 – 13
Design Director/Art Director 設計總監／美術總監	172	6 – 7
Production Director/ Production Manager 製作總監／製作經理	109	3 – 4
Marketing Director/ Marketing Manager 市場總監／市場經理	268	9 – 11
Sales Director/Sales Manager (Newspaper and Magazine Publications) 營業總監／營業經理（報刊）	197	7 – 8
Sales Director/Sales Manager (Book Publications) 營業總監／ 營業經理監事（書刊）	101	3 – 4
Editorial Manager 編輯經理	135	4 – 6
Manager (e-Publishing) 經理（電子出版）	26	1
Sub-total 小計	1 709	56 – 69

Job Title 職稱	Number of Workers at Time of Survey 調查期間 僱員人數	Forecast Annual Additional Skills Demand between 2015 and 2017 預測 2015 至 2017 年每年 技術人員的 需求數目
SUPERVISORY LEVEL 主任級		
Commissioning Editor/ Acquisition Editor 策劃編輯	151	4 – 5
Senior Editor 高級編輯	820	23 – 28
Designer 設計師	446	15 – 15
Production Supervisor 製作主任	151	4 – 5
Sales Supervisor 營業主任	388	11 – 13
Marketing/Publicity Supervisor 市場／宣傳主任	286	8 – 10
Customer Services Supervisor/ Officer (Books) 客戶服務主任（書籍）	53	2
Circulation Supervisor (Magazine & Newspapers) 發行主任（報刊）	187	5 – 6
Supervisor (e-Publishing) 主任（電子出版）	70	2 - 3
Sub-total 小計	2 552	71 - 87
TECHNICAL STAFF LEVEL 技術人員級		
Assistant Editor/Copy Editor/ Art Editor/Proof Reader 助理編輯／稿件編輯／ 美術編輯／校對員	2 719	86 – 104
Art Designer 美術設計員	672	21 – 26
Illustrator 插圖員	204	6 – 8
Desktop Publishing (DTP) Operator 桌面排版操作員	712	22 – 27
Production Assistant 製作助理	287	9 – 11
Sales Representative/ Sales Executive 營業代表／營業主任	1 120	35 – 43
Marketing/Publicity Assistant 市務助理／宣傳助理	656	21 – 25

Job Title 職稱	Number of Workers at Time of Survey 調查期間 僱員人數	Forecast Annual Additional Skills Demand between 2015 and 2017 預測 2015 至 2017 年每年 技術人員的 需求數目
TECHNICAL STAFF LEVEL (Continued) 技術人員級 (續)		
Other Publishing Related Jobs 其他出版業有關職位	18	1
Sub-total 小計	6 388	201 – 245

新技能提升計劃課程一覽表
Courses Offered under the Skills Upgrading Scheme Plus
(up to 31 March 2015)

<u>課程名稱</u>	<u>課程編號</u>	<u>時數(小時)</u>	<u>培訓機構**</u>
<u>軟性技巧、管理及營銷課程</u>			
印刷估價基礎證書	AT002ES	30	1
印刷業的危機管理技巧證書	OS006HS	4	2
<u>印前技術（基礎）課程</u>			
電腦相片修描 (PhotoShop CS) I 基礎證書	AT010ES	20	1
電腦小版製作 (InDesign CS) I 基礎證書	AT009ES	20	1
電腦繪圖 (Illustrator CS) I 基礎證書	AT011ES	20	1
平面設計與印刷 I 基礎證書	AT007ES / AT001HS	30	1
<u>印前技術（進階）課程</u>			
電腦相片修描 (PhotoShop CS) II 證書	AT014ES	20	1
電腦小版製作 (InDesign CS) II 證書	AT013ES / AT002HS	20	1
電腦繪圖 (Illustrator CS) II 證書	AT015ES	20	1
<u>課程名稱</u>			
<u>印前技術／生產流程／色彩管理課程</u>			
印刷生產流程標準化的認識基礎證書	AT021ES	12	1
色彩管理應用技巧 I 證書	AT008ES	25	1
<u>出版課程</u>			
基礎電子書刊出版證書	AT020ES / AT003HS	15	1

**** 培訓機構**

機構名稱	聯絡方法
(1) 印刷科技研究中心有限公司	地 址：將軍澳景嶺路3號香港知專設計學院 A805室 電 話：3928 2545
(2) 職業安全健康局	地 址：北角馬寶道28號華匯中心18樓 電 話：3106 2000

香港知專設計學院
傳意設計及數碼媒體學系
印刷及出版相關課程

**Relevant Printing and Publishing Courses Offered by
Department of Communication Design and Digital Media
Hong Kong Design Institute**

印刷科**Printing Stream**

<u>編號</u> <u>Code</u>	<u>模式</u> <u>Mode</u>	<u>課程名稱</u> <u>Title</u>	<u>修業期</u> <u>Durations</u>
DE114107	Full-time 全日制	Higher Diploma in Printing and Publishing 印刷及出版高級文憑	2 years 二年
DE114108	Full-time 全日制	Higher Diploma in Publication Design and Print Media(2-Year) 出版設計及印刷媒體高級文憑	2 years 二年

設計及數碼媒體科**Design and Digital Media Stream**

<u>編號</u> <u>Code</u>	<u>模式</u> <u>Mode</u>	<u>課程名稱</u> <u>Title</u>	<u>修業期</u> <u>Durations</u>
DE114103	Full-time 全日制	Higher Diploma in Film and Television 電影及電視高級文憑	2 years 二年
DE114102	Full-time 全日制	Higher Diploma in Creative Media 創意媒體高級文憑	2 years 二年
DE114101	Full-time 全日制	Higher Diploma in Advertising Design 廣告設計高級文憑	2 years 二年
DE114104	Full-time 全日制	Higher Diploma in Digital Music and Media 數碼音樂及媒體高級文憑	2 years 二年
DE114106	Full-time 全日制	Higher Diploma in Visual Communication 視覺傳意高級文憑	2 years 二年
DE114109	Full-time 全日制	Higher Diploma in Transmedia Design 超媒體設計高級文憑	2 years 二年