

**2012 Manpower Survey Report**  
**Printing and Publishing Industries**

**Printing and Publishing Training Board**  
**Vocational Training Council**

**印刷及出版業  
2012年人力調查報告**

**職業訓練局  
印刷及出版業訓練委員會**

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## Executive Summary

### 2012 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 2012 to collect the up-to-date manpower information. This is the seventh joint manpower survey of the printing and publishing industries.

2. The fieldwork of the survey covered 922 establishments (including 40 new cases) from a total of 5 902 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 2012, a total of 18 365 and 9 900 technical 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*

Branch \ Job Level	Technologist/ Managerial	Technician	Craftsman	Unskilled	Total	Percentage of Total Number of Employees
Newspaper Printing	15	91	381	29	516	<b>2.8%</b>
Job Printing	642	3 203	6 308	1 011	11 164	<b>60.8%</b>
Other Printing and Allied Industries	54	723	616	68	1 461	<b>8.0%</b>
Containers and Boxes of Paper and Paperboard	25	72	233	25	355	<b>1.9%</b>
Printing Agents	388	3 234	87	20	3 729	<b>20.3%</b>
Selected Organizations	119	639	266	116	1 140	<b>6.2%</b>
<b>Total</b>	<b>1 243</b>	<b>7 962</b>	<b>7 891</b>	<b>1 269</b>	<b>18 365</b>	<b>100%</b>
<b>Percentage of Total Number of Employees</b>	<b>6.8%</b>	<b>43.3%</b>	<b>43.0%</b>	<b>6.9%</b>	<b>100%</b>	

(B) *Publishing Industry*

Branch \ Job Level	Managerial	Supervisory	Technical Staff	Total	Percentage of Total Number of Employees
Publishing and Allied Industries	1 364	2 867	4 255	8 486	<b>85.7%</b>
Wholesales of Books, Periodicals and Newspapers	27	43	119	189	<b>1.9%</b>
Import and Export of Books, Periodicals and Newspapers	167	299	420	886	<b>9.0%</b>
Selected Organizations	75	147	117	339	<b>3.4%</b>
Total	1 633	3 356	4 911	9 900	<b>100%</b>
Percentage of Total Number of Employees	<b>16.5%</b>	<b>33.9%</b>	<b>49.6%</b>	<b>100%</b>	

4. Employers reported a total of 6 and 0 trainee, and 157 and 112 vacancies, representing about 0.03% and 0%, and 0.9% and 1.1% of the total workforce in the printing and publishing industries respectively at the time of survey. In addition, employers forecasted that by July 2013, the two industries would have a total workforce of 18 512 and 10 009 employees, representing increases of 0.8% and 1.01% respectively.

*Manpower Changes*

(A) *Printing Industry*

5. Compared with the findings of the 2010 survey on the printing industry, the annual decrease in manpower was 6.8%. 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 a difficult time and the survey revealed that the total number of establishments of the industry was 244 less than that in May 2010. As a result, it caused an annual decrease of 13.5%, 4.5% and 9.5% in technologist/managerial level, technician level and craftsman level respectively;
- (b) There was an annual decrease in manpower from 2.1% to 20.7% in various principal jobs at technologist/managerial level. It was attributed to the general downsizing in business in the printing industry over the two years. The annual increase of 9.5% (6 in number over two years) in number of procurement manager was due to its lower base number of 30;

- (c) The significant annual decrease of 6.8%, 17.2% and 8.3% in manpower of cost estimator/sales representative, production planner/controller/quality controller and designer/designer officer respectively resulted in general downsizing in business of the industry;
- (d) For the same reason as in (c), there was an annual decrease in manpower from 1.6% to 21.1% in various principal jobs at craftsman level; and
- (e) The sharp annual increase of 35.0% in the principal job of digital printing system craftsman reflected the continuous growth of digital printing. Another substantial annual increase of 20.4% in the principal job of offset lithographic platemaker showed the importance of offset printing.

**(B) *Publishing Industry***

6. Compared with the findings of the 2010 survey on the publishing industry, the annual increase in manpower was 3.0%. The Training Board considers that the manpower expansion over the past two years is attributable to the followings:

- (a) The significant annual increase of 16.5%, 13.1% and 37.3% in manpower of sales director/sales manager (book publications), managing director/general manager/publisher and editorial director/chief editor respectively showed that more small-sized publishing firms were set up in the last two years. Also, it seemed that partly due to the decreasing number of candidates for the job as they found the remuneration package not attractive enough. It was also partly due to promotion of editors to managerial level. As a result a substantial annual decrease of 19.3% in manpower of the job, editorial manager;
- (b) Over the two years, more free newspapers were introduced in the same period of time, which caused significant annual increase of 20.7%, 36.9% and 18.5% in manpower of production director/production manager, sales director/sales manager (newspaper and magazine publications) and production supervisor respectively. There was a significant annual decrease of 14.8% and 16.5% in manpower of customer services supervisor/officer (books) and circulation supervisor (magazines & newspapers) respectively as their seniors took over part of their workload and more readers switched to read newspaper and magazines on websites through their electronics devices such as smartphones and tablet personal computers;
- (c) During the report period, more books were designed with special features, such as pop-up and with multi-media functions of text, sound, colour drawings, images and attractive colour covers. It caused a sharp annual increase of 29.3% and 14.3% in number of design director/art director and designer respectively. In view of

the continuous growth of e-Publishing in the industry, there were a sharp annual increase of 41.2% and 200% in manpower of editorial manager (e-Publishing) and supervisor (e-Publishing) at managerial level and supervisory level respectively;

- (d) The survey also revealed an annual decrease of 9.4% in number of assistant art designer/illustrator respectively but an annual increase of 6.7% in desktop publishing (DTP) operator at the technical staff level. It was mainly due to further computerization in the industry that illustrations and drawings by hand were gradually replaced by computer. As a result, less manpower for this activity was required; and
- (e) The significant annual increase of 22.2% in manpower in production assistant was mainly caused by the increase in number of firms in Branch 1 – Publishing, from 1 179 in 2010 to 1 243 in 2012.

### ***Conclusions and Recommendations***

7. The Hong Kong printing and publishing industries had gone through a difficult time since the last survey in May 2010. The Euro debt crisis, the future decision and intervention of the United States Federal Reserve and impact of surging inflation on the Mainland's economy will significantly affect the development of the two industries. The continuous rapid increase of the appreciation of Renminbi, rise in wage, taxes and duties, and price increase in energy and materials will still make the operating cost at a high level. The shortage of workers in the Pearl River Delta is another challenge. On the other hand, other than the Mainland enterprises, various Asian manufacturers have continuously posed a strong competition to Hong Kong firms. On the other side, the Mainland has become the second large printing market in the world. In early March 2011, the Mainland revealed its 12<sup>th</sup> Five-Year Plan (the Plan) which would not only boost its domestic consumer demand and lift up the level of urbanization but would also aim to build a printing country. Thus, the Plan will also provide considerable opportunities for Hong Kong firms. 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.

8. 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 streamline and diversify business to make company more flexible, effective and efficient than before;
- (ii) To develop more creative, value-added, cost effective, high quality and green products / services, especially in cross media area, to increase competitive ability;

- (iii) 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;
- (iv) To carry on to explore new business in niche product markets and the most cost effective way so as to strengthen market share; and
- (v) 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 good 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	38 (3.0%)	118 (7.2%)
Technician/Supervisory	242 (3.0%)	111 (3.3%)
Craftsman/Technical Staff	240 (3.0%)	179 (3.6%)

(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 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 2012, 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 2013,
- (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***

- HSIC 581201 - Newspaper printing
- HSIC 181100 - Job printing
- HSIC 181201, 181202, 181299 - Printing and allied industries (mainly bookbinding; ornamentation of cards; photo-engraving; typesetting; and label embossing etc.)
- HSIC 170201, 170202 - Containers and boxes of paper and paperboard (for activities related to printing only)
- HSIC 829300 - Printing agents

Selected Organizations

(B) ***Publishing Industry***

- HSIC 581100, 581202, 581900 - Publishing and allied industries
- HSIC 460423 - Wholesales of books, periodicals and newspapers
- HSIC 451423, 452423 - Import and export of books, periodicals and newspapers

Selected Organizations

Note: HSIC denotes Hong Kong Standard Industrial Classification

1.6 The selected organizations 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/organizations with publishing personnel.

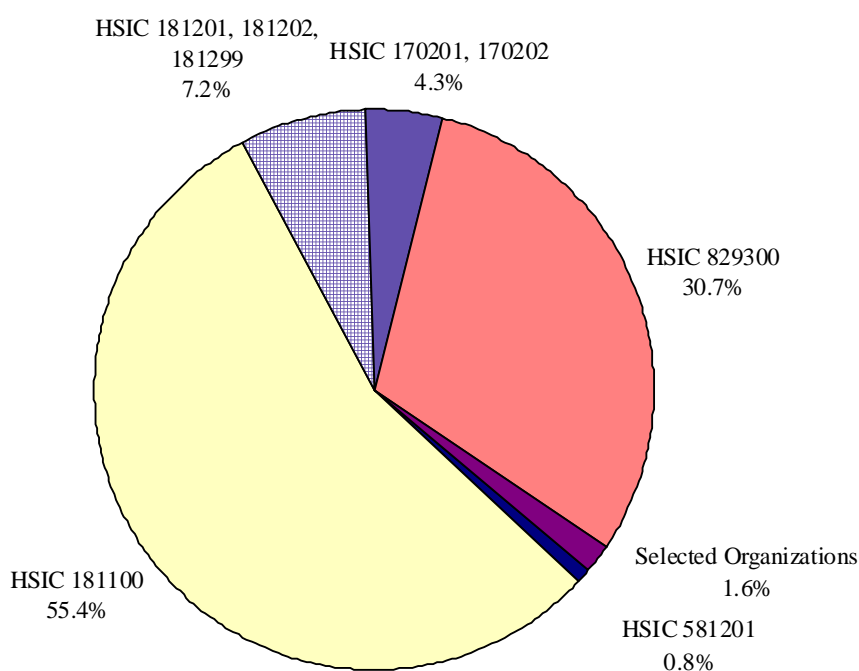


1.7 Under the classifications mentioned in paragraph 1.5 above, there were 4 304 and 1 163 establishments respectively in printing and publishing industries recorded by the Census and Statistics Department. The distribution of establishments by HSIC Classification is shown in Tables 1.1 and 1.2 and Figures 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
HSIC 581201 - Newspaper printing	34	0.8%
HSIC 181100 - Job printing	2 386	55.4%
HSIC 181201, 181202, 181299 - Other printing and allied industries	308	7.2%
HSIC 170201, 170202 - Containers and boxes of paper and paperboard (only printing and related activities)	187	4.3%
HSIC 829300 - Printing agents	1 322	30.7%
Selected Organizations	67	1.6%
Total	4 304	100%

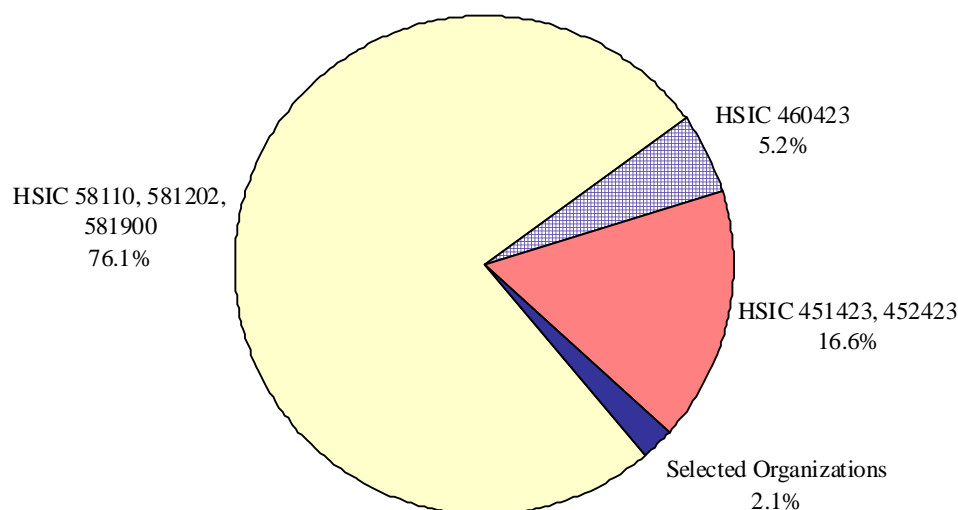
**Figure 1.1 : Distribution of Printing Establishments by Branch**



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

Branch	Number of Establishments	Percentage of Total Number of Establishments
HSIC 58110, 581202, 581900 - Publishing and allied industries	885	76.1%
HSIC 460423 - Wholesales of books, periodicals and newspapers	61	5.2%
HSIC 451423, 452423 - Import and export of books, periodicals and newspapers	193	16.6%
Selected Organizations	24	2.1%
Total	1 163	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 632 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 276 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 Anglo-Chinese Textbook Publishers Organization, 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 908 establishments, 697 supplied their manpower information. 93 establishments either had closed, moved or were no longer engaged in work related to the printing and publishing industries. 31 establishments had declined to supply any information. The effective response rate was 95.6%.

## ***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 53 principal jobs; the term "trainees" includes all trainees receiving any form of training and apprentices undergoing an apprenticeship.

## SECTION II

### SURVEY FINDINGS

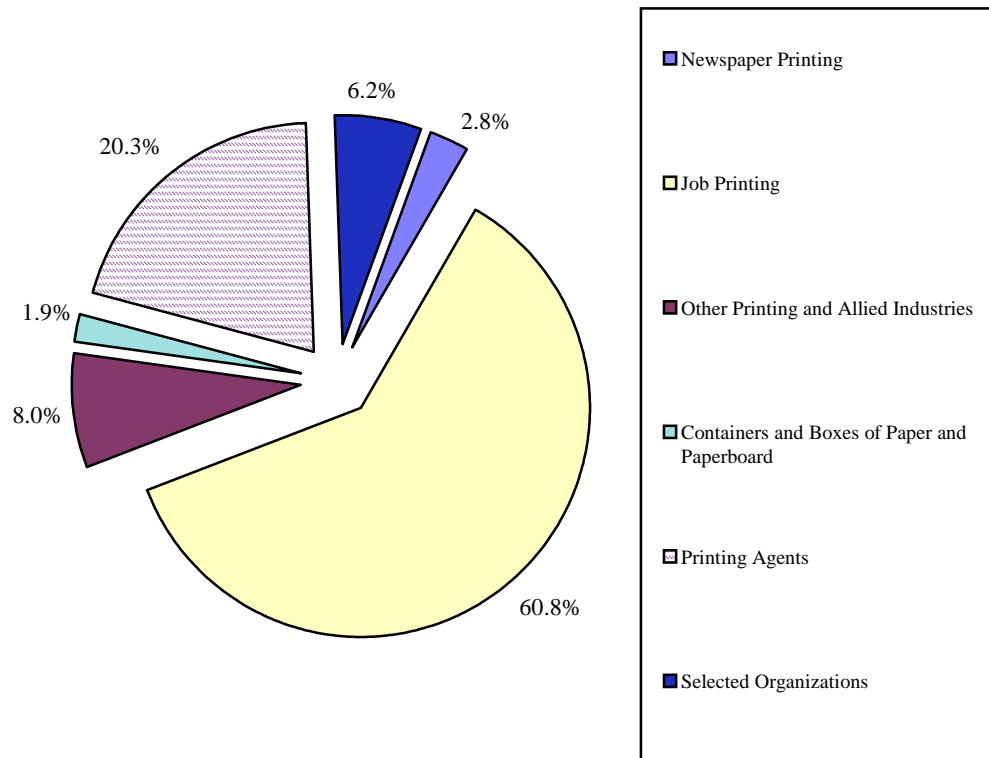
#### *Number of Workers Employed*

2.1 The survey revealed that during the period from mid-May to mid-October 2012, the printing and publishing industries employed a total of 18 365 and 9 900 employees in 26 and 27 principal jobs respectively. In terms of branches, there were 516 in newspaper printing, 11 164 in job printing, 1 461 in other printing and allied industries, 355 in containers and boxes of paper and paperboard, 3 729 in printing agents and 1140 in selected organizations in the printing industry; while there were 8 486 in publishing and allied industries, 189 in wholesales of books, periodicals and newspapers, 886 in import and export of books, periodicals and newspapers and 339 in selected organizations in the publishing industry. With regards to job level, there were 1 243 technologists/managers, 7 962 technicians, 7 891 craftsmen and 1 269 unskilled workers employed in the printing industry; whereas there were 1 633 managers, 3 356 supervisors, 4 911 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:

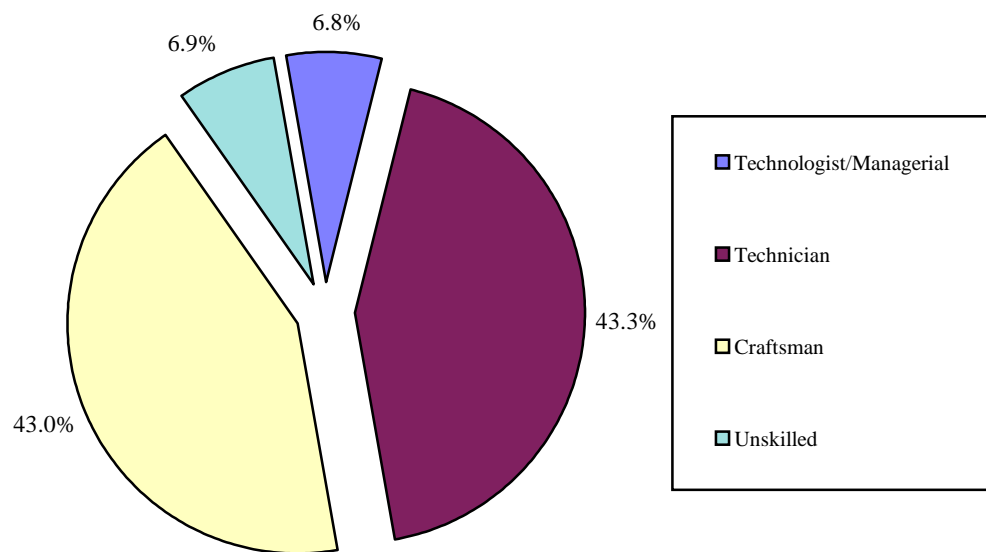
**Table 2.1 :** Distribution of Employees by Branch and Job Level in the Printing Industry

Job Level Branch	Technologist/ Managerial	Technician	Craftsman	Unskilled	Total	Percentage of Total Number of Employees
Newspaper Printing	15	91	381	29	516	2.8%
Job Printing	642	3 203	6 308	1 011	11 164	60.8%
Other Printing and Allied Industries	54	723	616	68	1 461	8%
Containers and Boxes of Paper and Paperboard	25	72	233	25	355	1.9%
Printing Agents	388	3 234	87	20	3 729	20.3%
Selected Organizations	119	639	266	116	1 140	6.2%
Total	1 243	7 962	7 891	1 269	18 365	100%
Percentage of Total Number of Employees	6.8%	43.3%	43%	6.9%	100%	

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



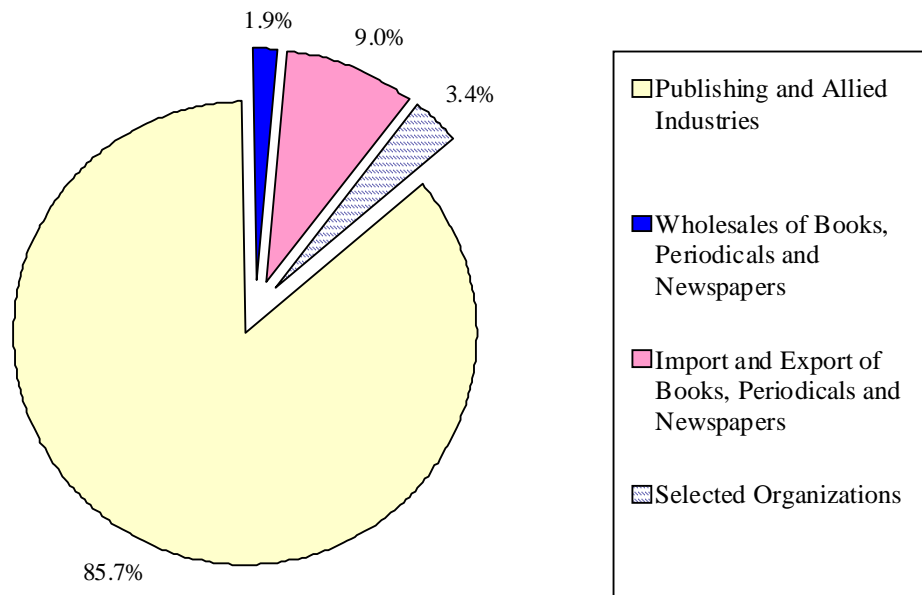
**Figure 2.2 : Distribution of Employees by Job Level in the Printing Industry**



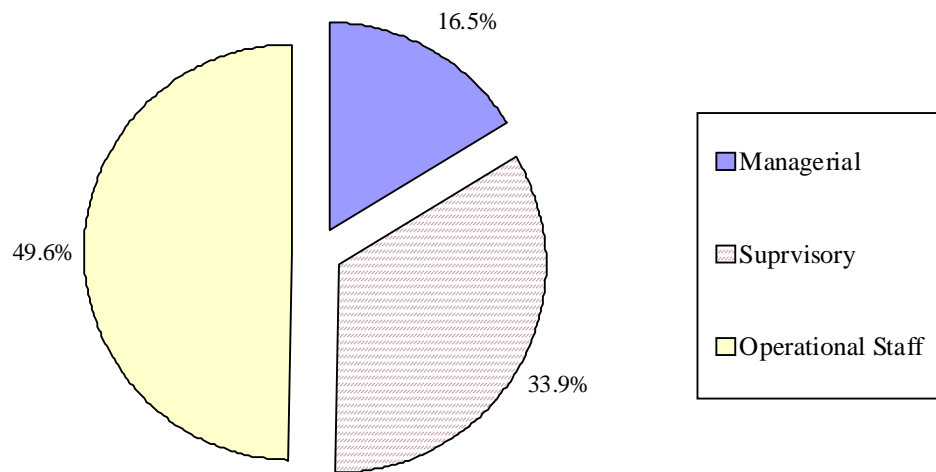
**Table 2.2 :** Distribution of Employees by Branch and Job Level in the Publishing Industry

Job Level \ Branch	Job Level			Total	Percentage of Total Number of Employees
	Managerial	Supervisory	Technical Staff		
Publishing and Allied Industries	1 364	2 867	4 255	8 486	85.7%
Wholesales of Books, Periodicals and Newspapers	27	43	119	189	1.9%
Import and Export of Books, Periodicals and Newspapers	167	299	420	886	9.0%
Selected Organizations	75	147	117	339	3.4%
Total	1 633	3 356	4 911	9 900	100%
Percentage of Total Number of Employees	16.5%	33.9%	49.6%	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 2012**

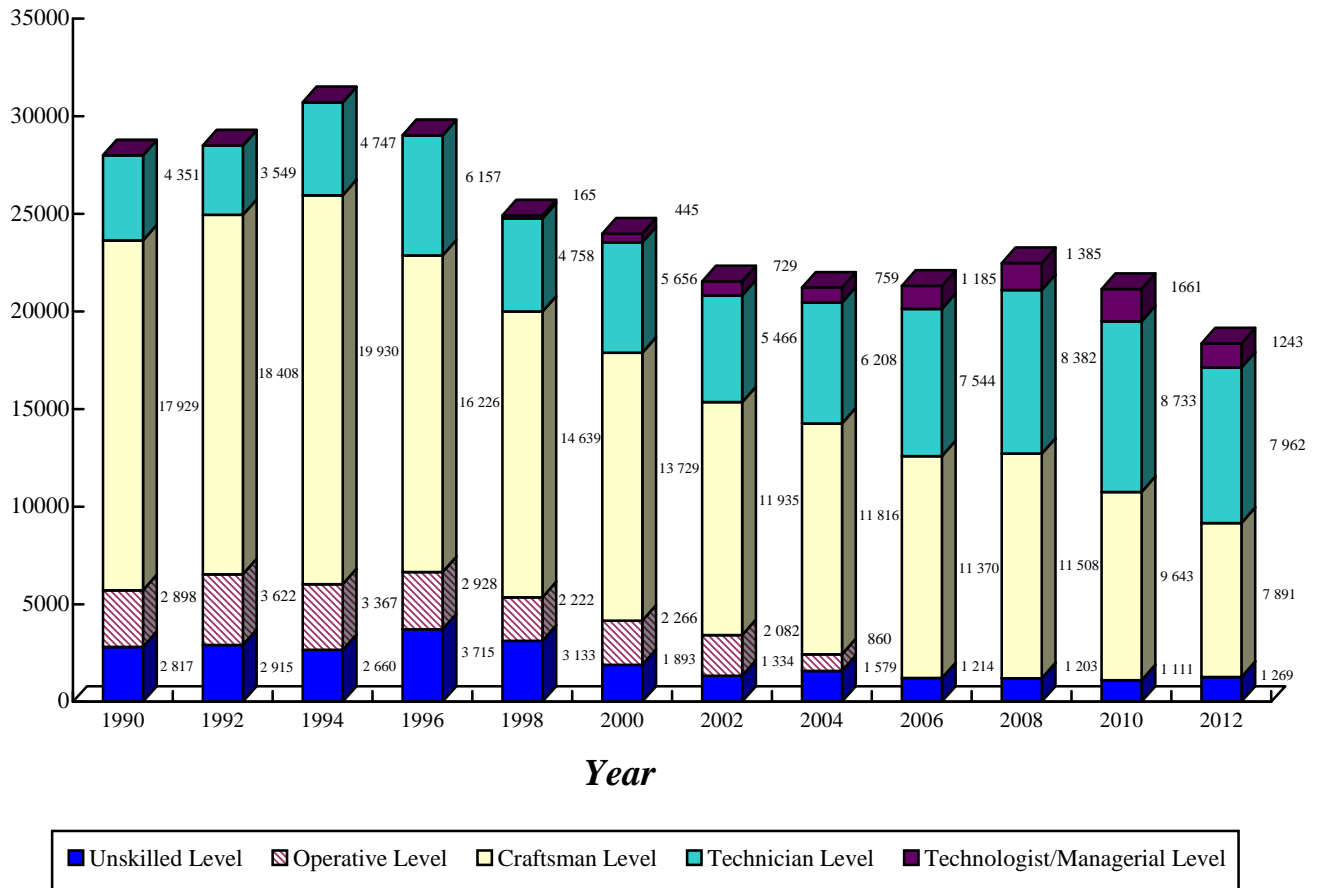
Year	Manpower at					Total Manpower
	*Technologist/ Managerial Level	Technician Level	Craftsman Level	Operative Level	Unskilled Level	
1990	-	4 351	17 929	2 898	2 817	27 995
1992	-	3 549	18 408	3 622	2 915	28 494
1994	-	4 747	19 930	3 367	2 660	30 704
1996	-	6 157	16 226	2 928	3 715	29 026
1998	165	4 758	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

\* 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 2012**

No. of Employees

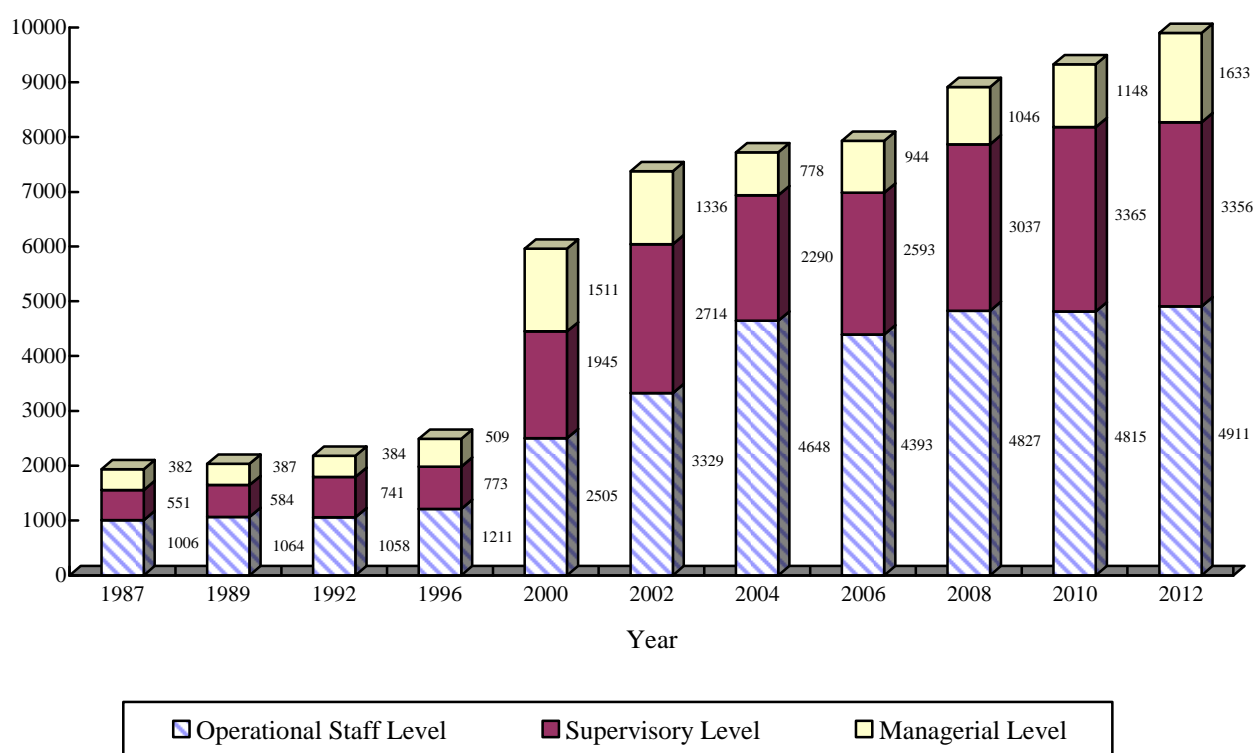


**Table 2.4 : Distribution of Employees by Job Level in the Manpower Surveys of the Publishing Industry between 1987 and 2012**

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

**Figure 2.6 : Distribution of Employees by Job Level in the Manpower Surveys of the Publishing Industry between 1987 and 2012**

No. of Employees



## *Number of Trainees*

2.3 At the time of the survey, there were 6 and 0 trainees representing 0.03% and 0% 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 industry is shown in Tables 2.5:

**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
Newspaper Printing	-	-	-	-	-	-
Job Printing	-	2	4	-	6	0.05%
Other Printing and Allied Industries	-	-	-	-	-	-
Containers and Boxes of Paper and Paperboard	-	-	-	-	-	-
Printing Agents	-	-	-	-	-	-
Selected Organizations	-	-	-	-	-	-
Total	-	2	4	-	6	0.03%
Percentage of Total Number of Employees at the Same Level	-	0.03%	0.05%	-	0.03%	

## *Number of Vacancies*

2.4 At the time of survey, the total number of job vacancies was 157 and 112, or 0.9% and 1.1% 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 2.6 and 2.7:

**Table 2.6 : 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
Newspaper Printing	-	1	20	-	21	4.1%
Job Printing	-	38	41	1	80	0.7%
Other Printing and Allied Industries	-	2	-	-	2	0.1%
Containers and Boxes of Paper and Paperboard	-	7	-	-	7	2.0%
Printing Agents	3	35	-	-	38	1.0%
Selected Organizations	-	-	6	3	9	0.8%
Total	3	83	67	4	157	0.9%
Percentage of Total Number of Employees at the Same Level	0.2%	1.0%	0.9%	0.3%	0.9%	

**Table 2.7 : 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
Publishing and Allied Industries	2	13	50	65	0.8%
Wholesales of Books, Periodicals and Newspapers	-	-	2	2	1.0%
Import and Export of Books, Periodicals and Newspapers	-	8	35	43	4.9%
Selected Organizations	-	2	-	2	0.6%
<b>Total</b>	<b>2</b>	<b>23</b>	<b>87</b>	<b>112</b>	<b>1.1%</b>
Percentage of Total Number of Employees at the Same Level	0.1%	0.7%	1.8%	1.1%	

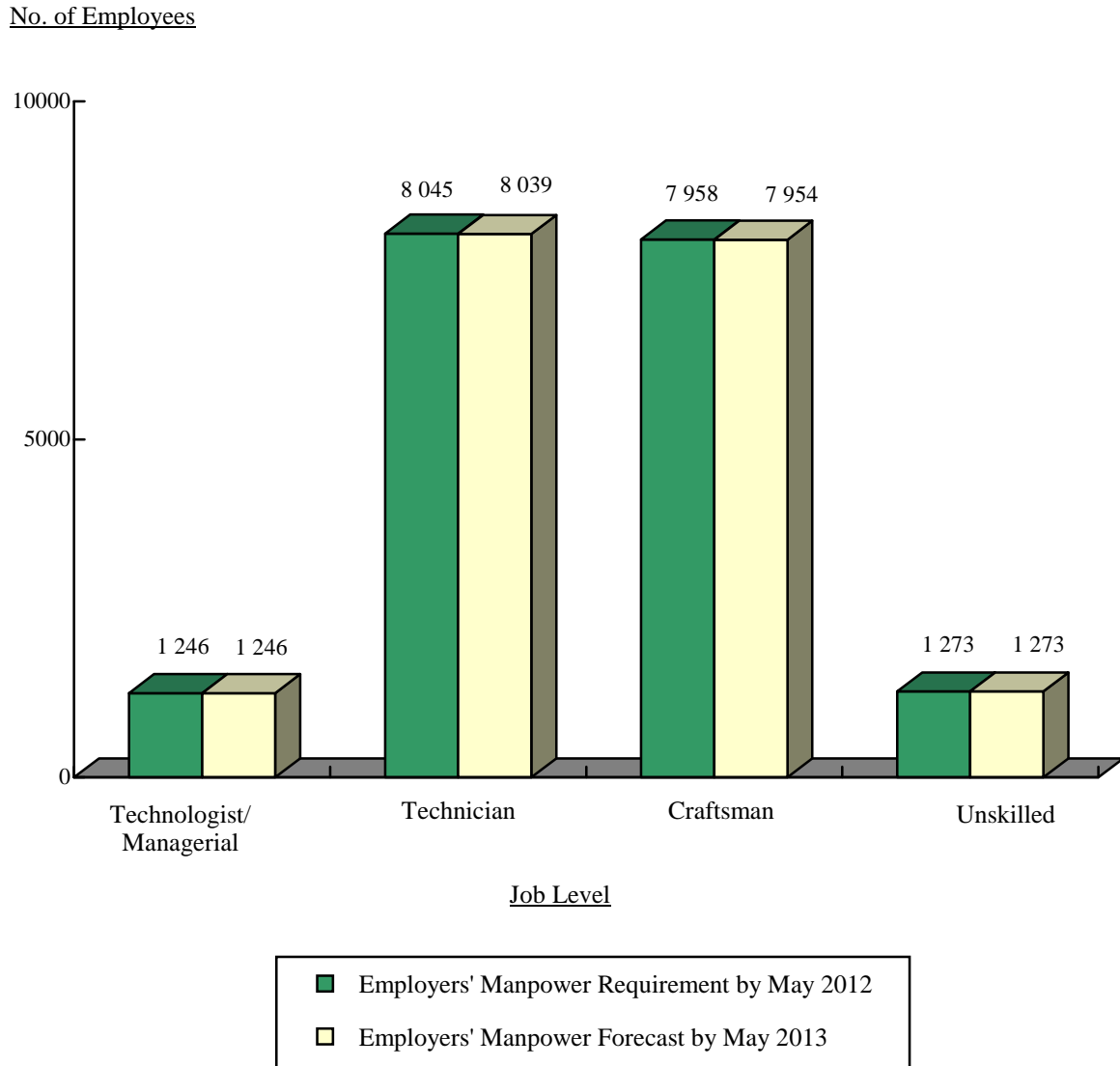
***Forecast Workforce by May 2013***

2.5 Employers forecast that there would be 18 512 and 10 009 employees employed in the printing and publishing industries respectively by May 2013. 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 2.8 and 2.9:

**Table 2.8 : Employers' Manpower Requirement by May 2012 and Manpower Forecast by May 2013 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 2013	Forecast Increase (+)/ Decrease (-) in Number of Employees
Technologist/ Managerial	1 243	3	1 246	1 246	-
Technician	7 962	83	8 045	8 039	- 6
Craftsman	7 891	67	7 958	7 954	- 4
Unskilled	1 269	4	1 273	1 273	-
<b>Total</b>	<b>18 365</b>	<b>157</b>	<b>18 522</b>	<b>18 512</b>	<b>- 10</b>

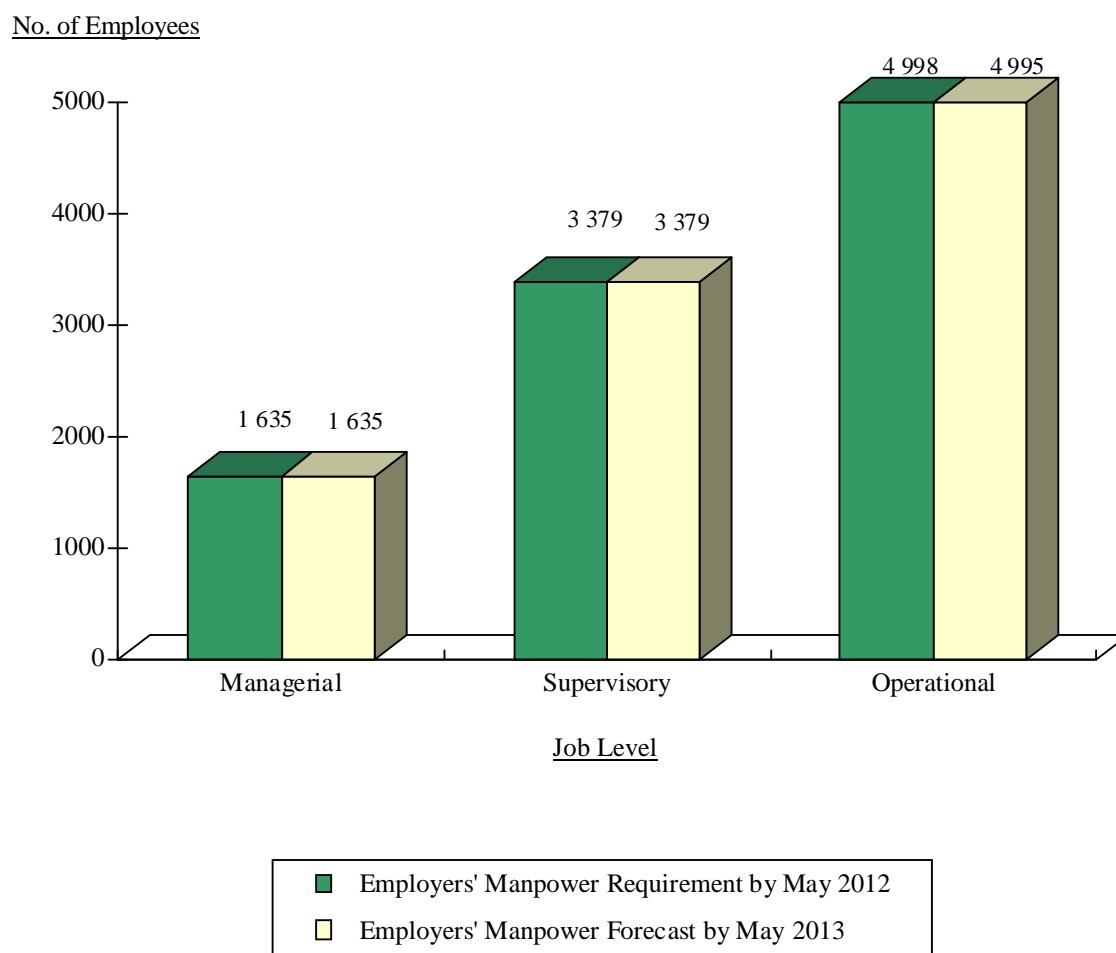
**Figure 2.7 : Comparison of Employers' Manpower Requirement by May 2012 and May 2013**



**Table 2.9 : Employers' Manpower Requirement by May 2012 and Manpower Forecast by May 2013 in the 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 2013	Forecast Increase (+)/ Decrease (-) in Number of Employees
Managerial	1 633	2	1 635	1 635	-
Supervisory	3 356	23	3 379	3 379	-
Technical Staff	4 911	87	4 998	4 995	-3
Total	9 900	112	10 012	10 009	-3

**Figure 2.8 : Comparison of Employers' Manpower Requirement by May 2012 and May 2013**



### ***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 2.10 and 2.11:

**Table 2.10 : Employers' Views on Preferred Education in the Printing Industry**

Job Level	Preferred Education
Technologist/Managerial	Degree / Diploma
Technician	Certificate / Secondary 5-7
Craftsman	Craft Certificate / Below Secondary 5

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

Job Level	Preferred Education
Managerial	Degree
Supervisory	Degree / Diploma
Technical Staff	Diploma / 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 2.12 and 2.13:

**Table 2.12 : Employers' Views on Preferred Period of Training in the Printing Industry**

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



**Table 2.13 : 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 4 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 2.14 and 2.15:

**Table 2.14 : 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 2.15 : 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 2.16 and 2.17:

**Table 2.16 : Distribution of Employees by Total Monthly Income Range in the Printing Industry**

Job Level	\$6,500 or below	\$6,501 - \$8,000	\$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	-	-	3	42	244	532	193	61	48	120	1 243
Technician	180	134	806	3 043	2 605	578	23	24	26	543	7 962
Craftsman	67	271	1 984	4 646	265	23	10	-	625	-	7 891
Unskilled	6	266	768	99	-	-	-	-	-	130	1 269
Total	253	671	3 561	7 830	3 114	1 133	226	85	1 418	74	18 365
Total Number of Employees in Percentage	1.38%	3.65%	19.39%	42.64%	16.96%	6.17%	1.23%	0.46%	7.72%	0.40%	100%

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

Job Level	\$6,000 or below	\$6,001 - \$8,000	\$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	-	-	-	27	55	480	547	159	120	245	1 633
Supervisory	68	67	8	253	1 389	944	191	25	30	381	3 356
Technical Staff	9	10	574	2 041	1 080	160	102	1	20	914	4 911
Total	77	77	582	2 321	2 524	1 584	840	185	170	1 540	9 900
Total Number of Employees in Percentage	0.78%	0.78%	5.88%	23.44%	25.49%	16.00%	8.48%	1.87%	1.72%	15.56%	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 2.18:

**Table 2.18 : 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	18 365	6 708	25 073	73.2%
Publishing Industry	9 900	4 752	14 652	67.6%
Total	28 265	11 460	39 725	71.2%

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

2.15 The survey revealed that about 49.8% and 70.1% 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 2.19 and 2.20.

**Table 2.19 : 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	36	1 500	1 676	6	3 218
10 - 49	38	213	153	5	409
50 & Over	5	44	5	4	58
All	79	1 757	1 834	15	3 685
Percentage of Firms	2.1%	47.7%	49.8%	0.4%	100%

**Table 2.20 : 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	72	537	275	0	884
10 - 49	26	134	49	10	219
50 & Over	9	37	6	8	60
All	107	708	330	18	1 163
Percentage of Firms	9.2%	60.9%	28.4%	1.6%	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 2.21 : 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	110	1 243	8.8%
Technician	123	7 962	1.5%
Craftsman	33	7 891	0.4%
Total	266	17 096	1.6%

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

2.17 The survey revealed that among 1 163 Hong Kong publishing companies, 77 of them operated with production workshops in Mainland China and employed 633 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 2.22 : 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	123	1 633
Supervisory	194	3 356
Technical Staff	316	4 911
Total	633	9 900

***Employees Promoted in the Printing Industry***

2.18 The survey revealed that 106 employees were promoted in the printing industry. The distribution of the employees promoted in the printing industry is as below:

**Table 2.23 : Number of Employees Promoted in the  
Printing Industry**

Branch \ Job Level	Technologist/ Managerial	Technician	Craftsman	Total
Newspaper Printing	-	2	17	19
Job Printing	8	18	5	31
Other Printing and Allied Industries	-	-	-	-
Containers and Boxes of Paper and Paperboard	-	-	-	-
Printing Agents	2	6	26	34
Selected Organizations	5	6	11	22
Total	15	32	59	106

### ***Employees Promoted in the Publishing Industry***

2.19 The survey revealed that 80 employees were promoted in the publishing industry. The distribution of the employees promoted in the publishing industry is as below:

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

Branch \ Job Level	Managerial	Supervisory	Technical Staff	Total
Publishing and Allied Industries	17	45	14	76
Wholesales of Books, Periodicals and Newspapers	-	-	-	-
Import and Export of Books, Periodicals and Newspapers	1	1	0	2
Selected Organizations	1	-	1	2
Total	19	46	15	80

## ***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 2.25 : 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
Newspaper Printing	3	-	6
Job Printing	124	88	1 416
Other Printing and Allied Industries	16	8	303
Containers and Boxes of Paper and Paperboard	-	-	132
Printing Agents	6	45	1 468
Selected Organizations	2	4	47
<b>Total</b>	<b>151</b>	<b>145</b>	<b>3 372</b>

**Table 2.26 : 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	2	24	1	2	20	-	-	-	49
Technician / Supervisory	12	17	1	1	10	5	3	2	51
Craftsman	49	33	4	-	59	34	-	4	183
<b>Total</b>	<b>63</b>	<b>74</b>	<b>6</b>	<b>3</b>	<b>89</b>	<b>39</b>	<b>3</b>	<b>6</b>	<b>283</b>

## ***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 2.27 : 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
Publishing and Allied Industries	37	145	697
Wholesales of Books, Periodicals and Newspapers	2	7	52
Import and Export of Books, Periodicals and Newspapers	29	17	137
Selected Organizations	-	11	12
Total	68	180	898

**Table 2.28 : 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	6	2	1	5	-	1	4	23
Supervisory	4	15	11	10	21	1	1	15	78
Technical Staff	15	15	12	15	20	1	1	-	79
Total	23	36	25	26	46	2	3	19	180



### ***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 2.29 : 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	Printing Technique
	2	Spoken Putonghua
	3	Media Technology
Technician/ Supervisory	1	Spoken Putonghua
	2	E-commerce knowledge and applications/ Computer Graphics & Webpage Design
	3	Spoken English
Craftsman	1	Printing Technique
	2	Pre-press Technique
	3	Post-printing Technique

### ***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 2.30 : 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	Media Technology/ Customer Service
	3	Spoken English
Supervisory	1	Spoken English
	2	Media Technology
	3	Computer Graphics & Webpage Design
Technical Staff	1	Computer Graphics & Webpage Design
	2	Media Technology
	3	E-commerce knowledge and applications

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, 260 establishments engaged in electronic publishing of the type of online publishing (256 establishments) and CD-ROM (17 establishments). Also, 903 establishments did not engage in electronic publishing. Details of employees engaged in electronic publishing are shown below:

**Table 2.31 : Employees Engaged in Electronic Publishing in Publishing Industry**

Branch	Online Publishing	CD-ROM	No. of Employees
Publishing and Allied Industries	244	15	941
Wholesales of Books, Periodicals and Newspapers	-	-	-
Import and Export of Books, Periodicals and Newspapers	-	-	-
Selected Organizations	12	2	47
Total	256	17	988

## SECTION III

### CONCLUSIONS

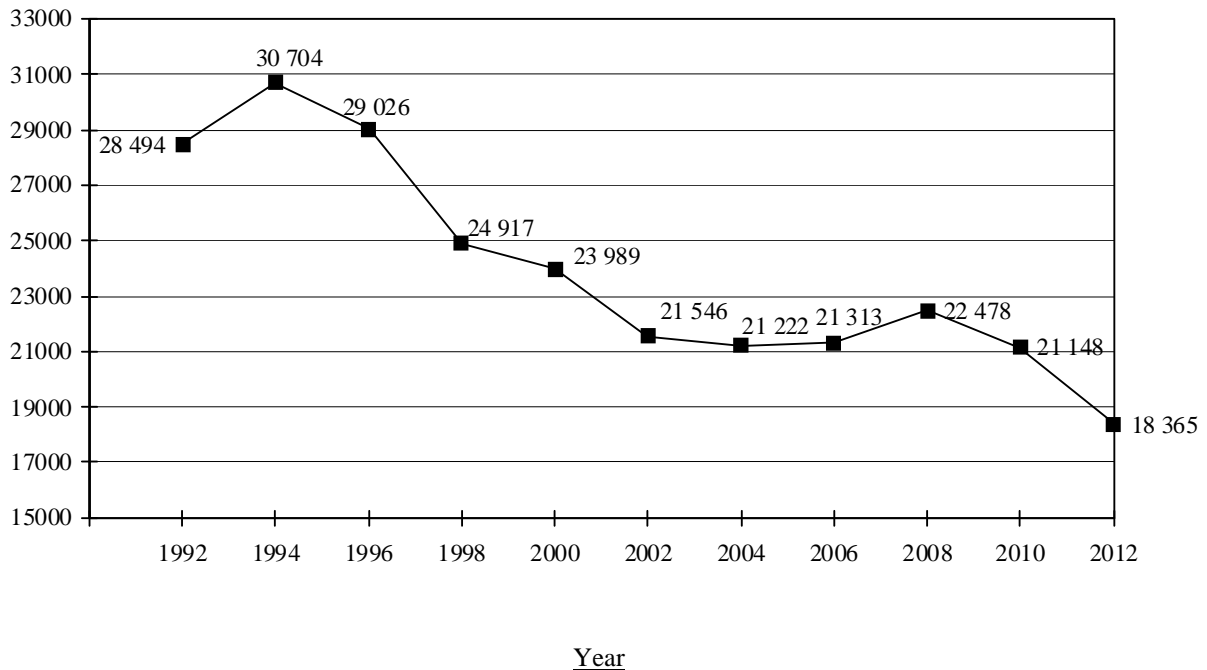
3.1 The Training Board has carefully examined the survey findings and considered that they generally reflect the employment situation of the printing and publishing industries at the time of the survey.

3.2 The survey revealed that the printing industry's workforce had decreased at an annual rate of 6.8% from 21 148 employees to 18 365 employees since the last survey conducted in May 2010. On the other hand, the workforce of the publishing industry had increased at an annual rate of 3.0% from 9 328 employees to 9 900 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 2012:

#### (A) *Printing Industry*

**Figure 3.1 : Manpower Situation of the Printing Industry  
Between 1992 and 2012**

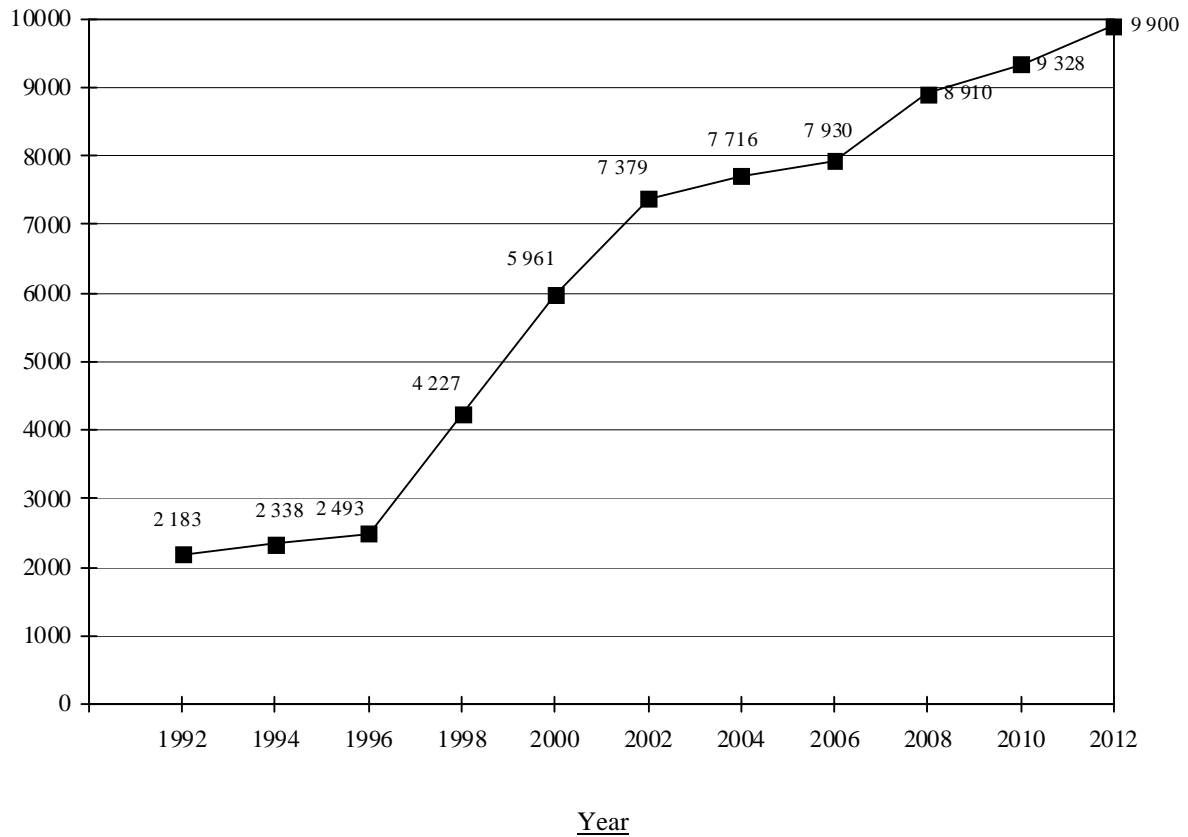
Number of Employees



(B) *Publishing Industry*

**Figure 3.2 : Manpower Situation of the Publishing Industry  
Between 1992\* and 2012**

Number of Employees

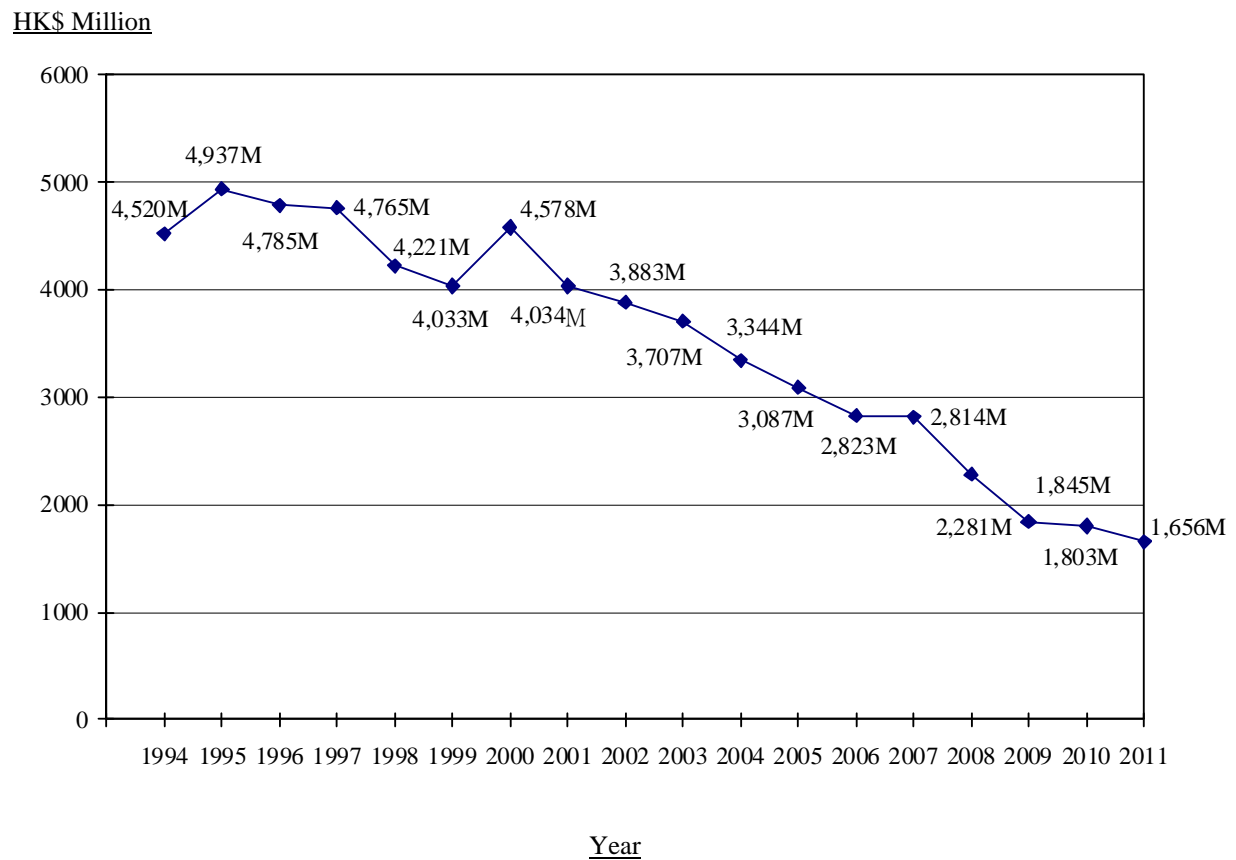


\* The surveys from 2000 covered a wider scope than the previous surveys in 1992 and 1996 conducted by the former Advertising, Public Relations and Publishing Training Board.

## 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\$1,656 million in 2011. The performance of the domestic export value of printed matters between 1994 and 2011 is shown in Figure 3.3.

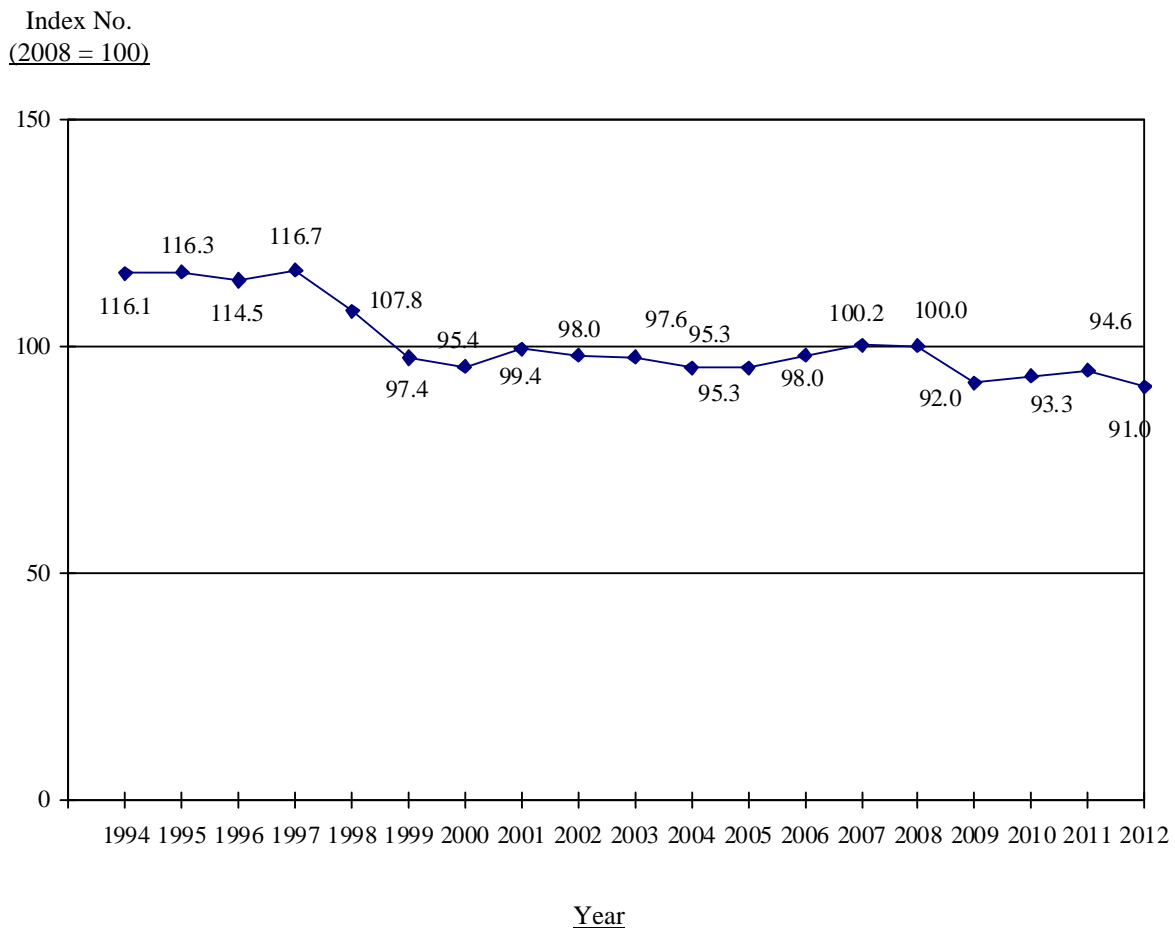
**Figure 3.3 : Domestic Export Value of Printed Matters between 1994 and 2011**



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 91 in 2012, 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***

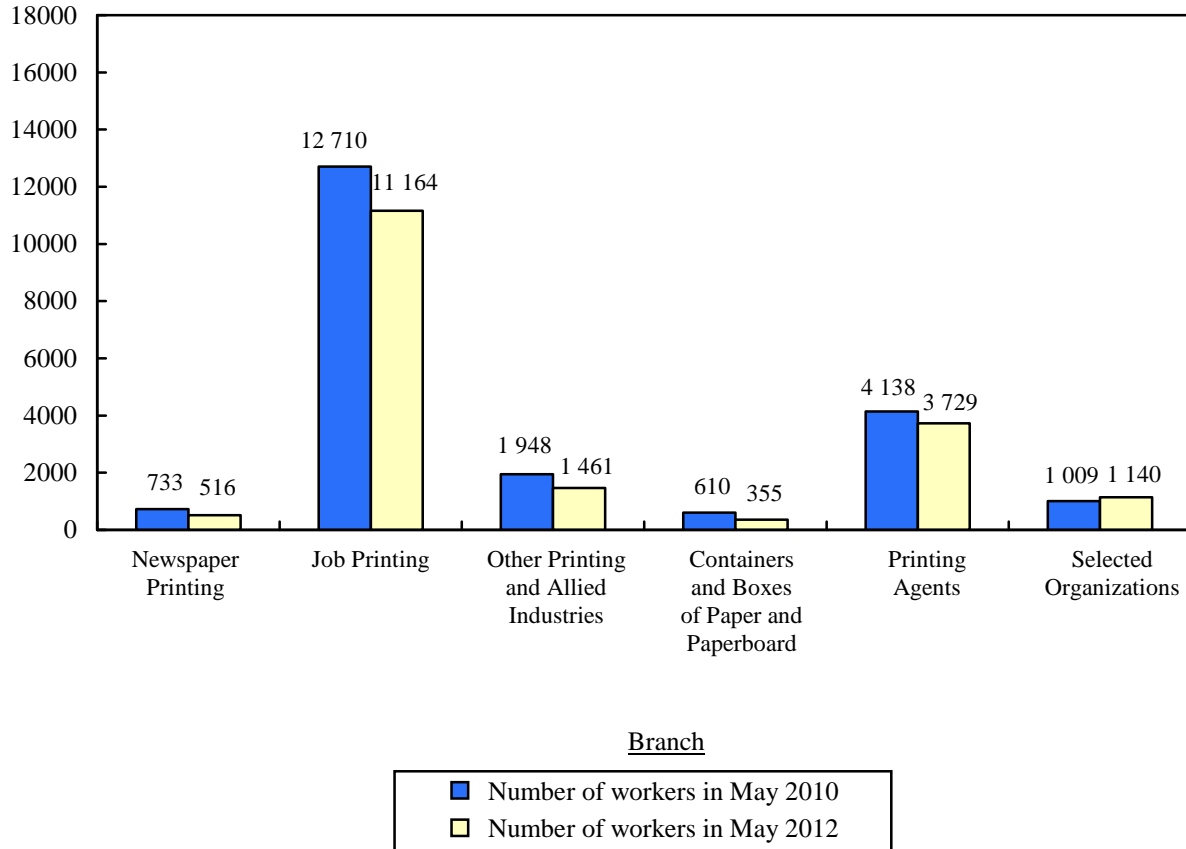
3.6 A breakdown of the manpower changes by branch in the printing industry between May 2010 and May 2012 is shown in Table 3.1 and Figure 3.5:

**Table 3.1 : Breakdown of Manpower Changes by Branch in the Printing Industry Between May 2010 and May 2012**

Branch	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
Newspaper Printing	733	516	-16.1%
Job Printing	12 710	11 164	- 6.3%
Other Printing and Allied Industries	1 948	1 461	- 13.4%
Containers and Boxes of Paper and Paperboard	610	355	- 23.7%
Printing Agents	4 138	3 729	- 5.1%
Selected Organizations	1 009	1 140	+ 6.3%
Total	21 148	18 365	- 6.8%

**Figure 3.5 : Manpower Changes by Branch in the Printing Industry between May 2010 and May 2012**

Number of Employees



3.7 The survey revealed that the technical manpower of selected organizations branch had increased 6.3% per annum from 1 009 in May 2010 to 1 140 in May 2012. This was attributable to more selected organizations were included in the survey and some of them employed more technical manpower to engage in related post.

3.8 Since the last survey conducted in May 2010, 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\$1 656 million in 2011 (in Paragraph 3.3) showing the situation. The total number of establishments in the first five branches surveyed in May 2012 was 4 237, which was 240 less than that in May 2010. Subsequently, less manpower was engaged in the printing industry causing an annual decrease from 5.1% to 23.7% in the five branches.



3.9 With the continuous growth of e-Publishing, readers can subscribe and read newspapers, magazines books and other information on websites. The number of readers to purchase or read printed materials decreased in the past few years. As a result, this also caused the decrease in number of manpower of the related branches of the printing industry.

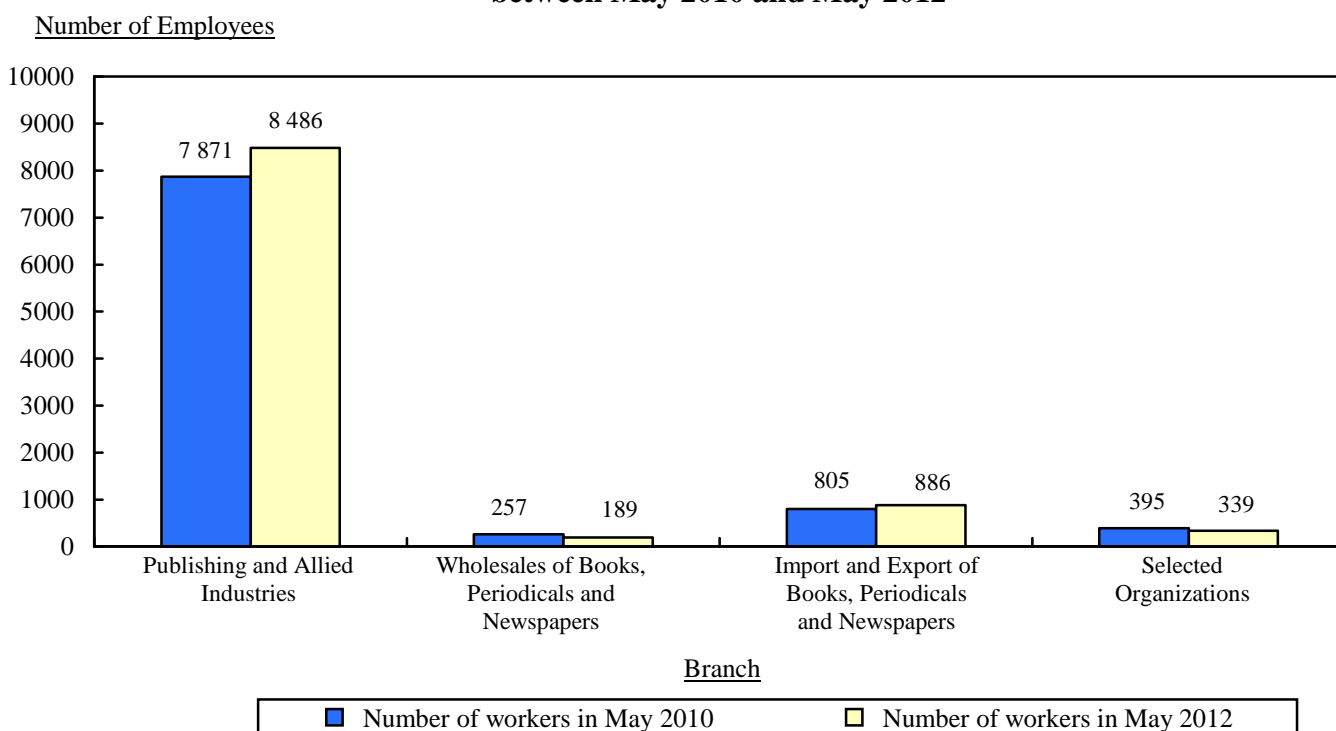
(B) *Publishing Industry*

3.10 A breakdown of the manpower changes by branch in the publishing industry between May 2010 and May 2012 is shown in Table 3.2 and Figure 3.6:

**Table 3.2 : Manpower Changes by Branch in the Publishing Industry between May 2010 and May 2012**

Branch	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
Publishing and Allied Industries	7 871	8 486	+ 3.8%
Wholesales of Books, Periodicals and Newspapers	257	189	- 14.2%
Import and Export of Books, Periodicals and Newspapers	805	886	4.9%
Selected Organizations	395	339	- 7.4%
Total	9 328	9 900	+ 3.0%

**Figure 3.6 : Manpower Changes by Branch in the Publishing Industry between May 2010 and May 2012**



3.11 The findings revealed that there was an annual slightly increase of 3.8% of manpower of publishing and allied industries branch from 7 871 in May 2010 to 8 486 in May 2012. The increase was mainly due to increase in number of bookstores and publishing companies in the past two years. For the same reason of increasing in number of companies, there was an annual increase of 4.9% of manpower of import and export of books, periodicals and newspapers branch. On the other hand, during the same period, there was a significant decrease of 14.2% of manpower of wholesales of books, periodicals and newspaper branch from 257 to 189. This was attributable to decrease in number of readers. The annual decrease 7.4% of manpower in selected organizations branch was due to the downsizing of some large publishing organizations.

### ***Manpower Changes by Job Level in the Printing Industry***

#### ***The Industry***

3.12 The manpower changes by job level in the printing industry between 2010 and 2012 are shown in Table 3.3:

**Table 3.3 : Manpower Changes by Job Level  
in the Printing Industry  
between May 2010 and May 2012**

Job Level	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
Technologist/Managerial	1 661	1 243	- 13.5%
Technician	8 733	7 962	- 4.5%
Craftsman	9 643	7 891	- 9.5%
Unskilled	1 111	1 269	+ 6.9%
Total	21 148	18 365	- 6.8%

### ***Technologist/Managerial Level***

3.13 The survey revealed a decrease of 13.5% per annum in manpower for the technologist/managerial level from 1 661 in 2010 to 1 243 in 2012. The difficult time in the printing industry since last survey in May 2010 resulted in decrease of establishments and caused the general decrease of manpower in the three technical job levels. 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 2010 and May 2012**

Principal Job	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
General Manager	363	345	- 2.5%
Production Manager/ Quality Manager	407	313	- 12.3%
Sales/Customer Services/ Marketing Manager	837	526	- 20.7%
Procurement Manager	30	36	+ 9.5%
IT Manager (Printing)	24	23	- 2.1%
Total	1 661	1 243	- 13.5%

### *Technician Level*

3.14 For the same reason as mentioned in para. 3.13, the survey also revealed a decrease in the number of technicians, from 8 733 in May 2010 to 7 962 in May 2012. 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 2010 and May 2012**

Principal Job	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
Cost Estimator/ Sales Representative	5 136	4 459	-6.8%
Production Planner/ Controller/ Quality Controller	899	616	- 17.2%
Overseer/Supervisor	479	507	+ 2.9%
Electrical & Mechanical Maintenance Technician (Printing)	315	325	+ 1.6%
Designer/Design Officer	565	475	- 8.3%
Prepress Technician and Information Technology (Printing) Technician	957	1 238	+ 13.7%
Purchasing Officer/ Controller	146	156	+ 3.4%
Technical Services/Products (Printing) Technician	236	186	- 11.2%
Total	8 733	7 962	- 4.5%

***Craftsman and Operative Levels***

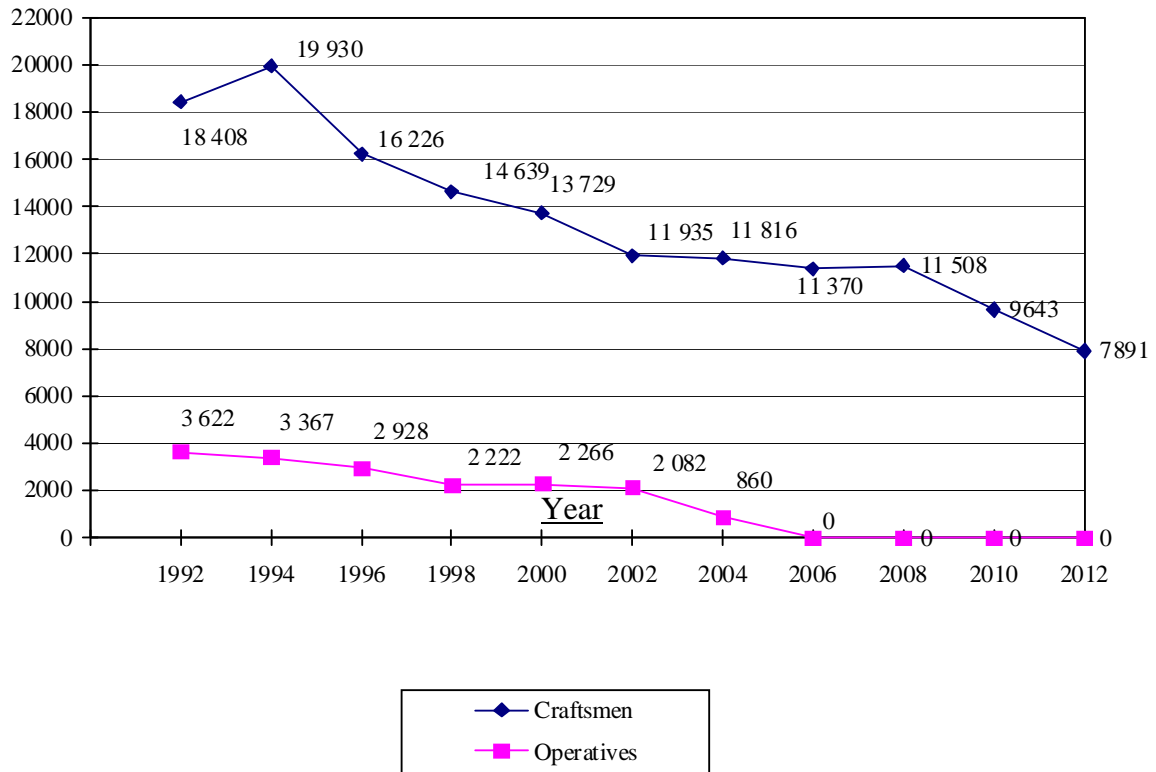
3.15 The survey also showed that there was a decrease of 9.5% per annum in the number of craftsmen between the two years. The jobs from operative levels were deleted from the survey since 2006. Details of the manpower changes are depicted in Table 3.6 and Figure 3.7:

**Table 3.6: Manpower Changes by Principal Job at Craftsman Level between May 2010 and May 2012**

Principal Job	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
Electronic Prepress System Craftsman	937	626	- 18.3%
Offset Lithographic Platemaker	585	848	+ 20.4%
Digital Printing System Craftsman	231	421	+ 35.0%
Printing Machine Craftsman (Offset Litho) (Sheet-fed)	4 286	3 174	- 13.9%
Printing Machine Craftsman (Offset Litho) (Web-fed)	719	696	- 1.6%
Other Printing Machine Craftsman	624	399	- 20.0%
Binding Craftsman	1 263	1 036	- 9.4%
Die Cutting / Tool Making Craftsman	293	214	- 14.5%
Package Finishing Machine Craftsman	214	171	- 10.6%
Other Print Finishing Craftsman	491	306	- 21.1%
Sub-total	9 643	7 891	- 9.5%

**Figure 3.7 : Manpower Changes at Craftsman and Operative Levels between June 1992 and May 2012**

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 2010 and 2012 are shown in Table 3.7:

**Table 3.7 : Manpower Changes by Job Level in the Publishing Industry between May 2010 and May 2012**

Job Level	No. of Employees in May 2010	No. of Employees in May 2012	Change Per Annum
Managerial	1 148	1 633	+19.3%
Supervisory	3 365	3 356	-0.1%
Technical Staff	4 815	4 911	1.0%
Total	9 328	9 900	+3.0%

### ***Managerial Level***

3.17 The survey revealed an annual increase of 19.3% 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 2010 and May 2012**

Principal Job	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
Managing Director/ General Manager/Publisher	277	354	+ 13.0%
Editorial Director/Chief Editor	217	409	+ 37.3%
Design Director/Art Director	85	142	+ 29.3%
# Production Director/ Production Manager	57	83	+ 20.7%
Marketing Director/ Marketing Manager	142	200	+ 18.7%
Sales Director/Sales Manager (Newspaper and Magazine Publications)	112	210	+ 36.9%
Sales Director/Sales Manager (Book Publications)	70	95	+ 16.5%
Editorial Manager	175	114	- 19.3%
* Manager (E-publishing)	13	26	+ 41.2%
Total	1 148	1 633	+ 19.3%

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

\* Additional principal job since May 2010.

**Supervisory Level**

3.18 The survey also revealed a mild decrease of 0.1% 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 2010 and May 2012**

Principal Job	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
Commissioning Editor/ Acquisition Editor/ Senior Editor	1 617	1 314	- 9.9%
Designer	436	570	+ 14.3%
# Production Supervisor	89	125	+ 18.5%
Sales Supervisor	716	770	+ 3.7%
Marketing/Publicity Supervisor	167	202	+ 10.0%
Customer Services Supervisor/Officer (Books)	182	132	- 14.8%
Circulation Supervisor (Magazine & Newspapers)/	142	99	- 16.5%
* Supervisor (E-publishing)	16	144	+ 200%
Total	3 365	3 356	- 0.1%

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

\* Additional principal job since May 2010.



### ***Technical Staff Level***

3.19 The survey revealed that the number of technical staff was stable in 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 2010 and May 2012**

Principal Job	Number of Employees in May 2010	Number of Employees in May 2012	Change Per Annum
Assistant Editor/Copy Editor/ Art Editor/Proof Reader	1 509	1 569	+ 2.0%
Art Designer/ Illustrator	709	582	- 9.4%
△ Desktop Publishing (DTP) Operator	361	411	+ 6.7%
# Production Assistant	199	297	+ 22.2%
Sales Representative/ Sales Executive	1 568	1 588	+ 0.6%
Marketing/Publicity Assistant	439	445	+ 0.7%
Other Publishing Related Jobs (Programmer and Designer / Cartography)	30	19	- 20.4%
Total	4 815	4 911	+ 1.0%

# 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 a difficult time and the survey revealed that the total number of establishments of the industry was 244 less than that in May 2010. As a result, it caused an annual decrease of 13.5%, 4.5% and 9.5% in technologist/managerial level, technician level and craftsman level respectively;

- (b) There was an annual decrease in manpower from 2.1% to 20.7% in various principal jobs at technologist/managerial level. It was attributed to the general downsizing in business in the printing industry over the two years. The annual increase of 9.5% (6 in number over two years) in number of procurement manager was due to its lower base number of 30;
- (c) The significant annual decrease of 6.8%, 17.2% and 8.3% in manpower of cost estimator/sales representative, production planner/controller/quality controller and designer/designer officer respectively resulted in general downsizing in business of the industry;
- (d) For the same reason as in (c), there was an annual decrease in manpower from 1.6% to 21.1% in various principal jobs at craftsman level; and
- (e) The sharp annual increase of 35.0% in the principal job of digital printing system craftsman reflected the continuous growth of digital printing. Another substantial annual increase of 20.4% in the principal job of offset lithographic platemaker showed the importance of offset printing.

**(B) *Publishing Industry***

- (a) The significant annual increase of 16.5%, 13.1% and 37.3% in manpower of sales director/sales manager (book publications), managing director/general manager/publisher and editorial director/chief editor respectively showed that more small-sized publishing firms were set up in the last two years. Also, it seemed that partly due to the decreasing number of candidates for the job as they found the remuneration package not attractive enough. It was also partly due to promotion of editors to managerial level. As a result a substantial annual decrease of 19.3% in manpower of the job, editorial manager;
- (b) Over the two years, more free newspapers were introduced in the same period of time, which caused significant annual increase of 20.7%, 36.9% and 18.5% in manpower of production director/production manager, sales director/sales manager (newspaper and magazine publications) and production supervisor respectively. There was a significant annual decrease of 14.8% and 16.5% in manpower of customer services supervisor/officer (books) and circulation supervisor (magazines & newspapers) respectively as their seniors took over part of their workload and more readers switched to read newspaper and magazines on websites through their electronics devices such as smartphones and tablet personal computers;

- (c) During the report period, more books were designed with special features, such as pop-up and with multi-media functions of text, sound, colour drawings, images and attractive colour covers. It caused a sharp annual increase of 29.3% and 14.3% in number of design director/art director and designer respectively. In view of the continuous growth of e-Publishing in the industry, there were a sharp annual increase of 41.2% and 200% in manpower of editorial manager (e-Publishing) and supervisor (e-Publishing) at managerial level and supervisory level respectively;
- (d) The survey also revealed an annual decrease of 9.4% in number of assistant art designer/illustrator respectively but an annual increase of 6.7% in desktop publishing (DTP) operator at the technical staff level. It was mainly due to further computerization in the industry that illustrations and drawings by hand were gradually replaced by computer. As a result, less manpower for this activity was required; and
- (e) The significant annual increase of 22.2% in manpower in production assistant was mainly caused by the increase in number of firms in Branch 1 – Publishing, from 1 179 in 2010 to 1 243 in 2012.

***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 2010:

**Table 3.11 : Comparison of 2012 Manpower Outturn with Training Board’s Forecast Made in 2010**

Job Level	Actual Outturn in 2012	Training Board’s Manpower Forecast in 2010	Forecast Compared with Actual Outturn
Technologist/Managerial	1 246	1 874	+ 33.5%
Technician	7 964	9 593	+ 17.0%
Craftsman	7 895	10 224	+ 22.8%

3.22 The forecasts of manpower demand made by the Training Board two years ago were higher than the actual outturn at the three job levels. The printing industry went through a difficult time since the last survey that an annual decrease of 13.5%, 4.5% and 9.5% at the technological/managerial, technician and craftsman levels respectively.

**(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 2008 is shown in Table 3.12:

**Table 3.12 : Comparison of 2012 Manpower Outturn with Training Board's Forecast Made in 2010**

Job Level	Actual Outturn in 2012	Training Board's Manpower Forecast in 2010	Forecast Compared with Actual Outturn
Managerial	1 633	1 301	- 25.5%
Supervisory	3 356	3 652	+ 8.1%
Technical Staff	4 911	5 166	+ 4.9%

3.24 The forecasts made by the Training Board were much lower than the actual outturns at the managerial level and higher at the supervisory and technical staff levels. The substantial deviation was mainly caused by the rapid growth of small publishing companies resulting in higher demand of managerial staff. The deviations at the last two levels between the actual outturns and the Training Board's forecasts were close.

***Business Outlook***

***Overview***

3.25 Hong Kong is the world's fourth printing centre. Despite the difficult time since the third quarter of 2011 for the printing industry, 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 2010, and the reveal of China 12<sup>th</sup> Five-Year Plan in March 2011, the opening of the Mainland market still provides considerable opportunities for Hong Kong printing firms. For the publishing industry, under Supplement VII to CEPA, distribution companies established by Hong Kong services suppliers on the Mainland can distribute books published in Hong Kong. This will help the publishing industry to expand their business in the Mainland.

3.26 The Euro debt crisis, the future decision and intervention of the United States Federal Reserve and impact of surging inflation on the Mainland will mainly affect the development of the printing and publishing industries. The implementation of the Mainland's Labour Contract Law together with Processing Trade Policy becomes essential operating cost items. The growing popularity of green concept together with compliance with safety requirements resulting the tightening of environment laws in China and other countries have imposed great pressure on Hong Kong firms in the past years. It is expected that such pressure will continue in the coming years.

3.27 Also, the rapid increase of the appreciation of Renminbi, rise in wage, taxes and duties, and price increase in energy and materials will still make the operating cost at a high level. The shortage of workers in the Pearl River Delta is another challenge. 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 excellent local telecommunication networks are great assets of the printing and publishing industries that both industries can be benefitted in 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 in cross media. Thus, more manpower with related trade knowledge with information technology skills will be in great demand in both industries.

3.29 Customers 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 benefitted. The Mainland has become the second 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. 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 the third pillar industry 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 quick delivery, competitive pricing with high quality and coping short –notice jobs, the Training Board believes that local printing firms can 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 market share.

3.32 Digital printing is expected to continue to grow and its application areas will increase significantly in the coming years. Customers from all over the world can send their orders in a single copy or large quantity directly or through middleware providers to the printing firms offering on-demand 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.

3.33 The growing popularity of e-Publishing will still 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 before. Also, they will need to develop more value-added and cost effective products/services to increase their competitive ability.

3.34 Packaging printing is expected to continue to grow 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 in both printing skills as demonstrated in Drupa 2012, it shows that offset printing and digital printing complement rather compete with each other.

### ***Publishing Industry***

3.35 E-Publishing will be the development trend in the publishing industry in the coming years. However, there is not yet a fixed business model available for the industry. 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. In the meantime, they face the challenge of setting up an effective and high-quality publishing workflow. 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.

3.36 Following the successful launch of the “Pilot Scheme on e-Learning in Schools” in 2010, the Education Bureau of the Hong Kong Government launched “E-Textbook Market Development Scheme (EMADS)” in June 2012. 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. It is expected that e-textbooks developed under the EMADS will be available for use in the 2014/15 school year. The scheme will provide considerable opportunities for the local publishing companies.

3.37 The revision of textbooks and related materials for the new senior secondary school under the 334 Educational Reform will increase in manpower of the publishing and allied industries.

3.38 On the other hand, with the aid of common use smartphones, tablet personal computers and other wireless electronics communication devices, more books, magazines and comics are developed in e-Edition for readers in recent years, which become more familiar to the public. In recent Hong Kong Book Fairs, there was either an “e-Book Corner” or an “e-Books and e-Learning Resources Zone” for publishers and related companies to promote their e-Publishing products and services to readers. The other important function of e-Books is to replace bulky reference books like dictionaries and encyclopaedias for easy reference. As a whole, it will be another opportunity for the publishing industry to extend their business market. 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. However, the publishers need to work out an effective workflow to develop e-Publishing. Also, an appropriate business model for the e-Publishing market is required. On the other side, tradition books with new features such as pop-up and augmented reality will be become attractions to readers.

## ***Future Technological Developments***

### ***(A) Printing Industry***

3.39 In view of unique features and merits of personalisation, variable data printing, on-demand printing, electrophotography, ink jet, 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, memorial event, personal history book and photo album for special events (like wedding, birthday party, birth of a new born baby and graduation) can be printed in small quantity and a fast way. It will gradually become a fast growing and high-profit business for the industry.

3.40 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 in becomes more important and popular in the printing industry. On the other hand, printing firms face the increasing pressure from publishers and print buyers worldwide to adopt various printing standardization in different countries, such as ISO (ISO TC130 Graphic Technology), US IDEAlliance G7, Switzerland Ugra PSO and Germany Fogra PSO. The printing standardization will become an essential certificate of quality assurance for printing firms in the coming years.

3.41 Green printing is growing popularity 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, UV ink and the bean and vegetable-based ink, low volatile organic compounds (VOC) and chemical-free plate.

3.42 3D printing and application of RFID in package will be the important developing areas and new opportunities in the printing industry. With apart from normal print, 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. The print technology -- printed electronics will become more mature. With its unique ability of printing thin, flexible and robust electronics devices, printed electronics will be gradually developed and widely used to produce the low-cost and high-performance electronics devices such as flexible displays and smart labels in the coming few years. Large format printing with flat-bed size and roll-fed size together with the advantages of faster speed, better quality and flexible materials will be another key business in the industry.

### **(B) *Publishing Industry***

3.43 The reading habit of readers gradually changes to accept e-Books more and young generation shows great learning enthusiasm in digital books, comics and contents. 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. More electronics devices with different operating systems (Android, iOS, Symbian, Windows Mobile and etc.) have been developed for e-Publishing. Other than the favourable i-Phones, i-Pads and the other e-Book readers, tablet PCs and other various mobile devices are also available in the market. This will further bloom the e-Publishing business. It is predicted that e-Book technology will continue to bring about a lucrative opportunity to the publishing industry.



3.44 Many different standards/formats are being used in different e-Readers for e-Publishing, i.e. Open Web Platform, EPUB3 and HTML5, but there is still no common standard yet for e-Publishing. 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. 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.

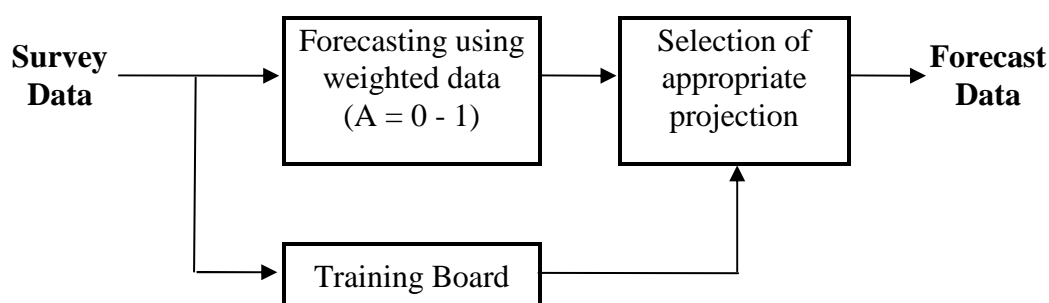
3.45 The Web becomes the universal platform for sharing and transmitting of digital contents and application experiences. The advanced development of cloud computing will further enhances the future development of e-Publishing, which includes multi-media interactive features, different languages, format 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 2013 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 2013 - 2015.

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 Having examined the past and present survey data, including the employers' manpower forecast by May 2013, and considered the future developments of the printing industry, the Training Board considers that the training for wastage (3%) for the three 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 (2013 – 2015) are as follows:

**Table 3.13 : Annual Manpower Demand in the Printing Industry for 2013/15**

Job Level	Annual Average Additional Demand for Employees		
	Forecast of Total Number of Employees by May 2013	Wastage (3%)	(±10% Range)
Technologist/Managerial	1 246	38	34 - 42
Technician	8 039	242	218 - 266
Craftsman	7 954	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. In view of the relatively young workforce, the Training Board also adopts a wastage rate of 3% for manpower at the managerial, supervisory and technical staff levels in the next three years. The Training Board notices that an annual increase of 3% in the overall manpower of the industry in May 2012 when compared with that in May 2010. With reference to the continuous growing of electronic publishing, the Training Board remarks that there will be an increase in workforce, especially at the managerial job level.

3.52 From the above estimates, the annual additional manpower demand required by the publishing industry in the next three years (2013 – 2015) are as follows:

**Table 3.14 : Annual Manpower Demand in the Publishing Industry for 2013/15**

Job Level	Annual Average Additional Demand for Employees			
	Forecast Growth (A)	Wastage (B)	Total (A) + (B)	(±10% Range)
Managerial	68	50	118	106 - 130
Supervisory	9	102	111	100 - 122
Technical Staff	29	150	179	161 - 197

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 34 - 42 technologists for 2013 - 2015. Together with the demand for some 5 - 7 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 39 - 49 for 2013 – 2015.

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 2013 – 2015 is as follows:

<u>Course</u>	<u>Estimated No. of Graduates</u>		
	<u>2012/13</u>	<u>2013/14</u>	<u>2014/15</u>
<u>Full-time</u>			
Higher Diploma in Photography and Graphic Imaging	1	1	0
Higher Diploma in Printing and Publishing (3-Year)	70	60	2
Higher Diploma in Printing and Publishing (2-Year)	0	58	58
Total:	71	119	60

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 is 218 – 266 annually in the next three years. Together with a demand for some 3 – 5 production supervisors in the publishing industry for 2013-2015 as mentioned in Appendix 18, the total annual demand of the industry for technicians will be 221 – 271 for 2013 – 2015.

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>2012/13</u>	<u>2013/14</u>	<u>2014/15</u>
Diploma in Vocational Studies (DVS) (Advertising, Packaging and Printing)	1	0	0
DVS (Advertising, Packaging and Printing) – Technician Foundation Certificate (TFC) Award	6	0	0
Diploma in Vocational Education (DVE) Programme (Advertising, Packaging and Printing) – TFC Award	5	0	0
DVE Programme (Advertising, Packaging and Printing) – DVE Award	49	44	52
DVE Programme (Graphic Communications) – DVE Award	83	50	68
Total:	144	94	120

3.59 The total output from the Pro-Act Training and Development Centre (Printing) cannot meet the projected demands for 2013 – 2015. 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 2013 – 2015 in the printing industry. Together with the demand of total 10 – 12 printing craftsmen (production assistant) for they coming three years as mentioned in Appendix 18 in the publishing industry, the total annual demand of the industry for craftsmen will be 226 – 276 for 2013 – 2015.

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>2012/13</u>	<u>2013/14</u>	<u>2014/15</u>
DVE Programme (Advertising, Packaging and Printing) – Basic Craft Certificate (BCC) Award	9	26	45
DVE Programme (Graphic Communications) – BCC Award	13	46	43
Total:	22	72	88

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 2014 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 The Hong Kong printing and publishing industries had gone through a difficult time since the last survey in May 2010. The Euro debt crisis, the future decision and intervention of the United States Federal Reserve and impact of surging inflation on the Mainland will significantly affect the development of the printing and publishing industries. The continuous rapid increase of the appreciation of Renminbi, rise in wage, taxes and duties, and price increase in energy and materials will still make the operating cost at a high level. The shortage of workers in the Pearl River Delta is another challenge. On the other hand, other than the Mainland enterprises, various Asian manufacturers have continuously posed a strong competition to Hong Kong firms. On the other side, the Mainland has become the second large printing market in the world. In early March 2011, the Mainland revealed its 12<sup>th</sup> Five-Year Plan (the Plan) which would not only boost its domestic consumer demand and lift up the level of urbanization but would also aim to build a printing country. Thus, the Plan will also provide considerable opportunities for Hong Kong firms. 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 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 streamline and diversify business to make company more flexible, effective and efficient than before;
- (ii) To develop more creative, value-added, cost effective, high quality and green products / services, especially in cross media area, to increase competitive ability;
- (iii) 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;
- (iv) To carry on to explore new business in niche product markets and the most cost effective way so as to strengthen market share; and
- (v) 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 good 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.

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 only 6 trainees in the printing industry; and no trainees in the publishing industry. 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 2013 to 2015**

<i>Job Level</i>	Recommended Annual Intake	
	Printing Industry	Publishing Industry
Technologist/Managerial	38	118
Technician/Supervisory	242	111
Craftsman/Technical Staff	240	179

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

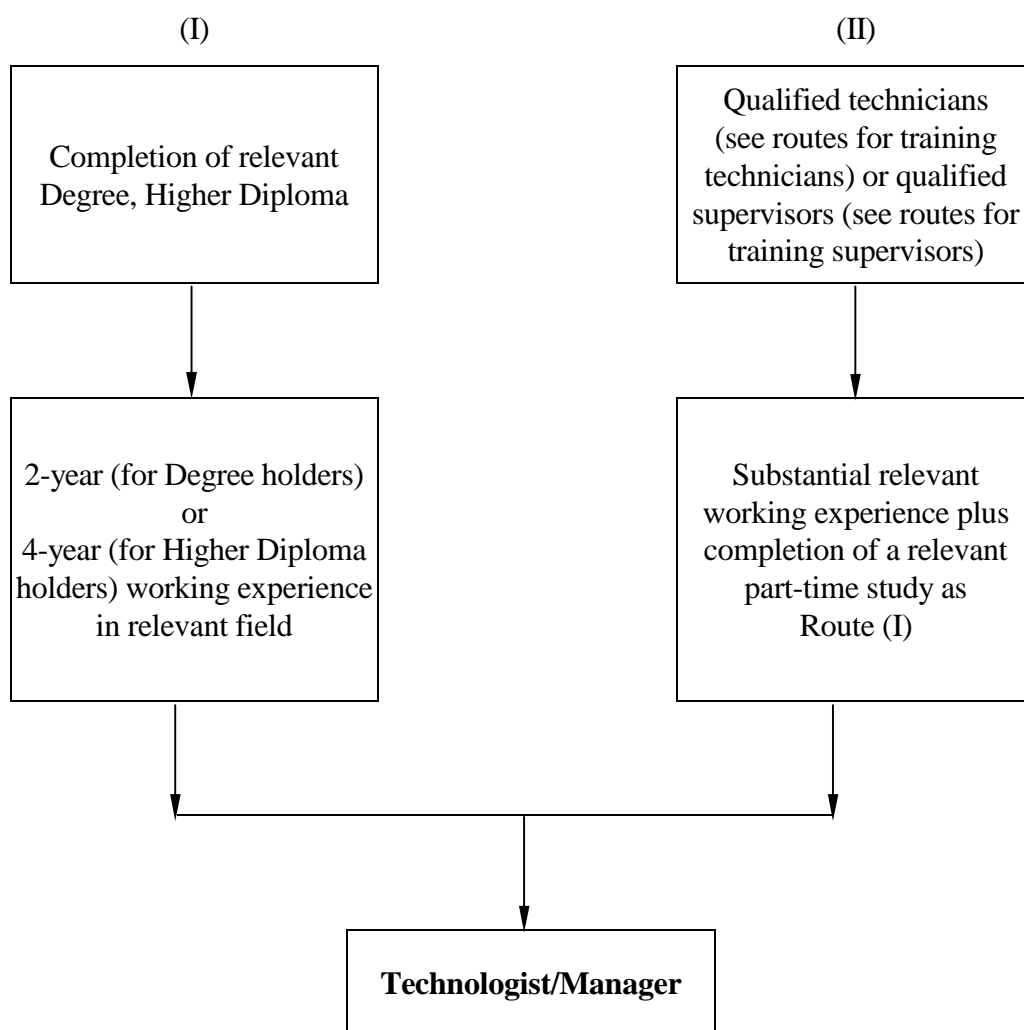
4.7 For manpower planning at the company level, employers are requested to note that the volume of training as indicated in para. 4.6 above, when expressed in terms of existing manpower, represents annual training requirements of 3.0% (the wastage rate) of the total numbers of technologists/managers, technicians and craftsmen in the printing industry for 2013 – 2015, and about 7.2%, 3.3 % and 3.6% respectively of total numbers of managers, supervisors and technical staff in the publishing industry for 2013 – 2015.

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.

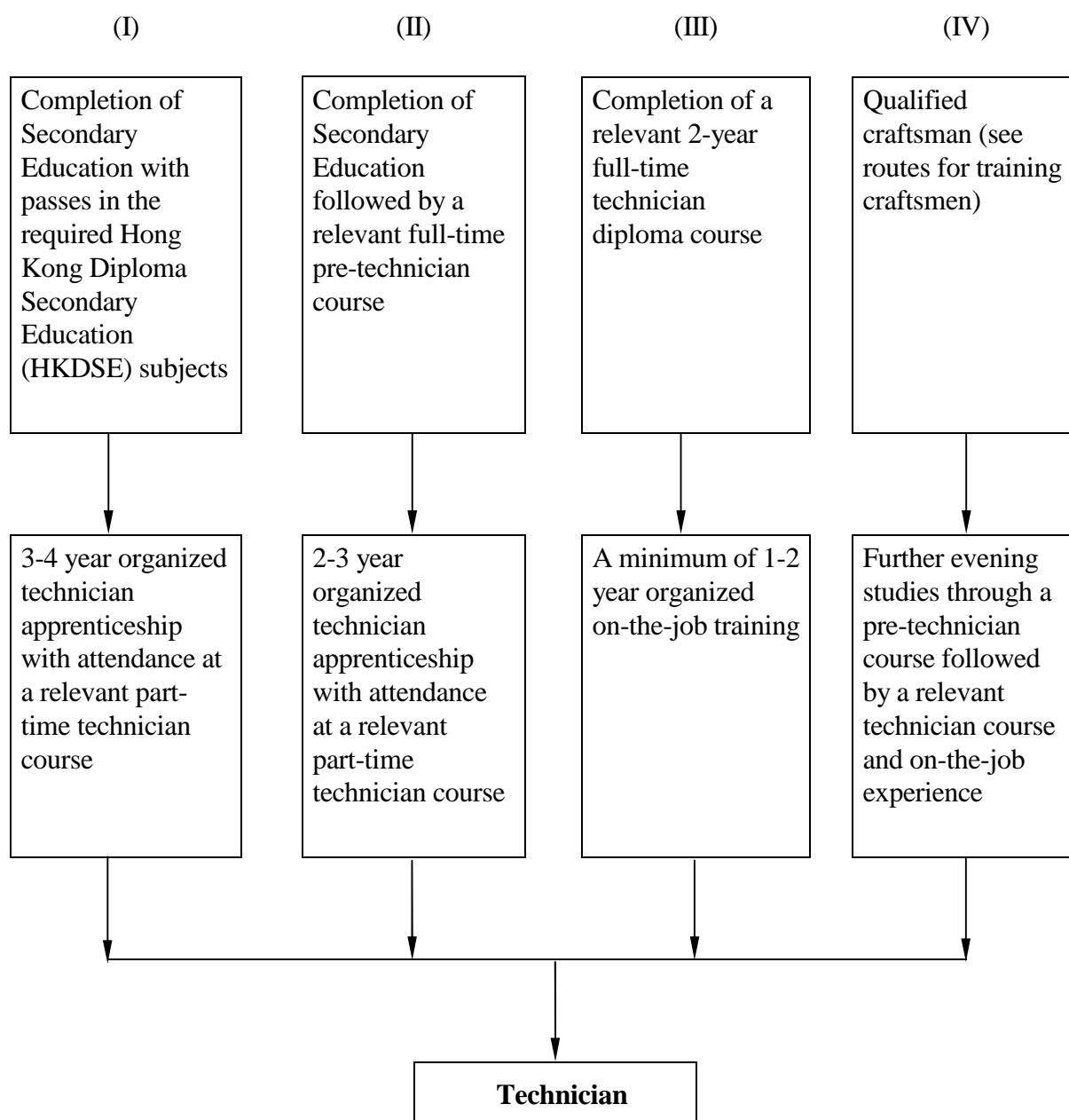
4.12 Employers are recommended to sponsor their technicians/supervisors to attend the part-time evening degree, higher diploma or higher certificate courses to upgrade their knowledge and skills.

## Training of Technicians and Supervisors

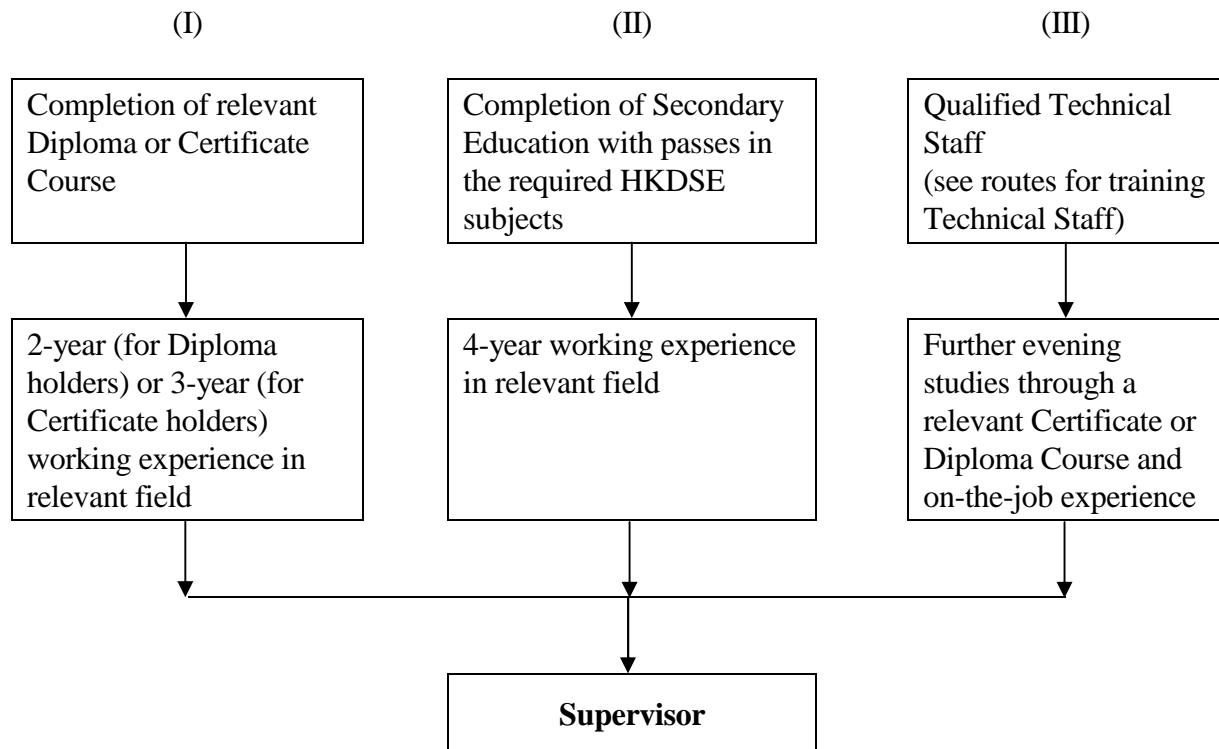
4.13 A technician or supervisor should be able to apply proven techniques and procedures to carry out technical responsibilities, including the supervision of craftsmen or technical staff under his/her control. The training of a technician or supervisor should comprise on-the-job practical training to 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.

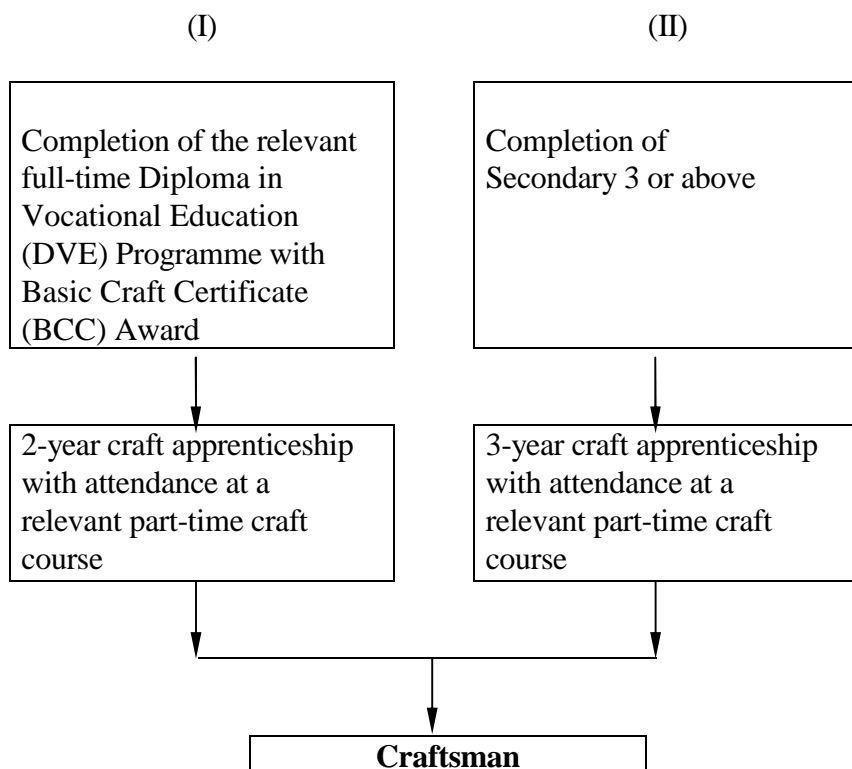
4.17 The Training Board strongly recommends employers both in the printing and publishing industries to recruit the graduates of the Pro-Act Training and Development Centre (Printing) and HKDI and to sponsor them to attend part-time courses for the purpose of either upgrading or updating their skills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

## Training of Craftsmen and Technical Staff

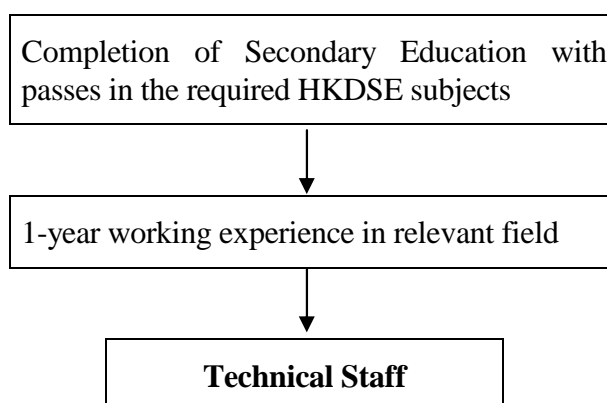
4.18 A craftsman or technical Staff is a skilled employee capable of applying skills to a wide range of jobs within the trade. He/She should require not only practical skills but also related theoretical knowledge so that he/she can adapt to technological advancement.

4.19 The recommended routes of training are:

(A) *Printing Industry - Craftsmen*



(B) *Publishing Industry - Technical Staff*



4.20 The Basic Craft Certificate (BCC) courses offered by the Pro-Act Training and Development Centre (Printing) of the Vocational Training Council were faded out in 2009. Since academic year 2009/10, the Pro-Act Training and Development Centre (Printing) had launched a newly developed programme - the Diploma in Vocational Education (DVE) – Print Media. The previously offered BCC courses were subsumed into the programme. On completion of 930 training hours on trade modules and 210 hours on generic modules, 168 credits were earned. Basic Craft Certificate would be awarded to graduates.

### **Basic Craft Courses in Printing Discipline**

4.21 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.

4.22 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.

4.23 The BCC awarded course being offered by the Pro-Act Training and Development Centre (Printing) is listed in paragraph 4.29.

### **New Skills Upgrading Scheme**

4.24 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. Trainees of the SUS courses would be subsidized 70% of the full fees. 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.

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

### **Trade Testing for Printing Workers**

4.26 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.

4.27 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.

4.28 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)**

4.29 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 Programme, Print Media (TFC Award)	1- 2 years
(c) Diploma in Vocational Education Programme, Print Media (DVE Award)	1-3 years
(d) Practical training for students of HKDI & various IVEs in Design and Business Administration Disciplines	3-180 hours

*Note : BCC : Basic Craft Certificate*

*TFC : Technician Foundation Certificate*

*DVE : Diploma in Vocational Education*

## ***Department of Communication Design and Digital Media***

4.30 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)***

4.31 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.

4.32 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 with a total equipment value over HK\$ 15 million 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.

4.33 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.

4.34 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 and 2013, two 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**

4.35 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**

4.36 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 **Engineering Graduate Training Scheme**, which helps engineering students and graduates complete their professional training as engineers;
- (c) The voluntary **Trade Testing and Certification Scheme**, which ascertains the standards of skilled workers; and
- (d) 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**

4.37 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**

4.38 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 2012年人力調查報告摘要

### 簡介

為蒐集印刷業、出版業的最新人力資料，印刷及出版業訓練委員會於2012年5月中至10月中為兩大行業進行人力調查。兩大行業聯合進行人力調查已是第七次。

2. 政府統計處登記的業內機構有5 902間，實地調查工作覆蓋其中 922 間（包括40間新加機構）。從這些選定機構所集得的數據經統計方式倍大，以反映業內整體人力情況。

### 調查發現

3. 調查顯示，2012年5月時，印刷業及出版業共有18 365 名及9 900 名技術僱員。各技能等級及行業門類的僱員分布如下：

#### (A) 印刷業

技能等級 門類	技師／管理	技術員／ 督導	技工	非技術 人員	總計	佔僱員總數百分 率
報紙印刷	15	91	381	29	516	2.8%
商業印刷	642	3 203	6 308	1 011	11 164	60.8%
其他印刷及有關活 動	54	723	616	68	1 461	8.0%
容器、紙盒及紙板盒	25	72	233	25	355	1.9%
印務代理	388	3 234	87	20	3 729	20.3%
選定機構	119	639	266	116	1 140	6.2%
總計	1 243	7 962	7 891	1 269	18 365	100%
<b>佔僱員總數百分率</b>	<b>6.8%</b>	<b>43.3%</b>	<b>43.0%</b>	<b>6.9%</b>	<b>100%</b>	

## (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
出版及有關活動	1 364	2 867	4 255	8 486	85.7%
書報及期刊批發	27	43	119	189	1.9%
書報及期刊進出口貿易	167	299	420	886	9.0%
選定機構	75	147	117	339	3.4%
總計	1 633	3 356	4 911	9 900	100%
佔僱員總數百分率	16.5%	33.9%	49.6%	100%	

4. 據僱主填報，印刷業共有6名受訓者（佔人力0.03%）、157個職位空缺（佔人力0.9%），出版業受訓者為0（佔人力0%）、職位空缺有112個（佔人力1.1%）。此外，僱主亦估計至2013年7月時，印刷業總人力為18 512（上升0.8%），出版業總人力為10 009（上升1.01%）。

## 人力變化

### (A) 印刷業

5. 相對於2010年的調查，印刷業人力的年度減幅為6.8%。本會認為過去兩年業內人力轉變受以下因素影響：

- (a) 印刷業經營困難，調查數據顯示，業內公司的總數較2010年5月調查時少244間；導致印刷業技師／管理人員、技術員／督導及技工的人數減少。每年減幅分別為13.5%、4.5%及9.5%；
- (b) 印刷業技師／管理級各主要職務的人數減少，每年減幅由2.1%至20.7%。原因是過去兩年，業內公司一般都縮減了業務規模。由於採用較低的基數30，採購經理的人數則有所增加，每年增幅為9.5%（過去兩年數字為6）；
- (c) 由於印刷公司整體縮減業務規模，導致印刷估價員／營業代表、生產策劃員／生產管制員／品質管制員、設計員／設計主任的人數顯著減少，每年減幅分別為6.8%、17.2%及8.3%；
- (d) 從事技工級各項主要職務的人數減少，每年減幅由1.6%至21.1%，原因與(c)所述相同；

- (e) 主要職務中，數碼印刷系統操作技工人數大增，每年增幅為 35.0%，反映數碼印刷持續增長；另一錄得顯著增幅的職務柯式版製作技工，每年增幅為 20.4%，可見柯式印刷對業務十分重要。

## (B) 出版業

6. 相對於2010年調查，出版業人力的年度增幅為3.0%。本會認為，過去兩年業內的人力增長受下列因素影響：

- (a) 營業總監 / 營業經理監事（書刊）、董事經理 / 總經理 / 出版人、總編輯 / 主編的人力有顯著增加，每年增幅分別為 16.5%、13.1% 及 37.3%；反映過去兩年有更多小型出版公司成立。然而，編輯經理的人力大幅減少，每年減幅為19.3%；申請職位的人數減少，部分原因可能是申請人認為薪酬並不特別吸引，另外部分原因是這一經理職級的空缺由編輯晉升而填補；
- (b) 過去兩年，多份免費報紙同期推出，導致製作總監 / 製作經理、營業總監 / 營業經理（報刊）、製作主任的人力顯著增加，每年增幅分別為 20.7%、36.9% 及 18.5%。客戶服務主任（書籍）及發行主任（報刊）的人力則顯著減少，每年減幅分別為 14.8% 及 16.5%。上司分擔了部分工作，加上愈來愈多讀者透過電子設備如智能手機及平板電腦在網上閱讀報刊，以致人力下降；
- (c) 調查期間，愈來愈多書籍採用特色設計，例如立體書，以及附有發聲、彩圖、影像和精美彩色封面等多媒體功能。因此，設計總監 / 美術總監及設計師的人手大增，每年增幅分別為 29.3% 及 14.3%。由於電子出版行業持續增長，經理級的電子出版經理及主任級的電子出版主任人數均大增，每年增幅分別為 41.2% 及 200%；
- (d) 調查又顯示，助理設計員 / 插圖員的人力每年減幅為9.4%，但技術人員級的桌面排版操作員的每年增幅則為6.7%。這主要是由於業務進一步電腦化，電腦繪圖逐步取代手繪，導致有關工作的人力減少；及
- (e) 製作助理的人力增幅顯著，每年達22.2%，主要是由於門類 1 – 出版行業的公司數目，由 2010 年的 1 179間大增至 2012 年的 1 243間。

## 結論與建議

7. 自上次人力調查（2010年5月）後，香港印刷及出版業經歷艱難時期。歐債危機、美國聯邦儲備局未來的決定和干預、內地通脹急升等，都會大大影響印刷及出版業的發展。人民幣幣值持續急升，工資、稅項和關稅上漲，能源及物料價格上揚等，亦將令營運成本繼續居高不下。珠三角地區勞工短缺亦是另一項挑戰。除了內地同行外，本港機構亦面對亞洲區內多個生產商接踵而來的業務挑戰，競爭劇烈。不過，另一方面，內地現已成為世界第二大印刷市場，2011年3月初，中國公布《十二五規劃》，不但力求促進內需，加速城市化，同時亦會以建設成印刷大國為目標。《十二五規劃》將為本港公司締造不少商機。香港擁有優越的電訊網絡，有助數碼印刷及電子出版蓬勃發展，業界如可善用此寶貴資產，定能受惠。

8. 基於上述種種因素，本會對印刷及出版業未來幾年的前景持審慎樂觀的態度，相信印刷業的業務將可維穩，而出版業則可望錄得溫和增長。本會建議僱主考慮採取以下措施，應付當前的形勢和未來的挑戰：

- (i) 精簡和分散業務，以提升運作靈活度和效率，使業務更勝從前；
- (ii) 發展更具創意、高增值、富成本效益、優質及環保的產品／服務（特別是跨媒體領域方面），以提升競爭力；
- (iii) 提供適當的培訓，加強員工整體技術水平和能力，特別是資訊科技、設計及創意，使公司更具實力和競爭力；
- (iv) 在本身具優勢的產品市場內，以最具成本效益的方法繼續開拓新商機，擴大市場佔有率；
- (v) 維繫現有的重點客戶，加強伙伴合作，並尋求與潛在的新客戶建立伙伴關係。

9. 至於員工技術及才幹方面，本會建議僱主在考慮公司的培訓需求以外，亦參考附錄 15 及附錄 16 所載印刷業和出版業的「僱員所需的訓練（各門類）」資料。在當前的特別情況下，僱主宜加強培訓力度，確保有足夠的幹練人才迎接未來的挑戰和掌握商機。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，適時為業界提供所需培訓服務。

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：

<b>技能等級</b>	每年需增加人手數目	
	印刷業	出版業
技師／管理／經理	38 (3.0%)	118 (7.2%)
技術員／督導／主任	242 (3.0%)	111 (3.3%)
技工／技術人員	240 (3.0%)	179 (3.6%)

(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）、印刷科技研究中心辦有各類兼讀制課程，僱主亦應善用以提升從業員的水平。本會又鼓勵僱主聯絡VTC，設立培訓計劃，並透過新科技培訓計劃，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），按職權範圍所規定，須負責確定印刷及出版兩大行業的人力需求，並據此向 VTC 提供有關培訓設施發展建議，配合業界的人手需求。本會的委員名單和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（統計處）協助下，於 2012 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 2013 年 5 月時的僱員總數；
- (e) 僱主對僱員宜有教育程度、訓練形式及訓練期的意見；
- (f) 僱員的平均收入；
- (g) 獲晉升僱員人數；
- (h) 有否在中國內地設廠房；
- (i) 招聘困難；以及
- (j) 僱員培訓需求。

1.4 此外，本會亦請印刷業僱主提供調查前十二個月內，派駐本港以外地方工作超過六個月的技師／管理人員、技術員及技工人數的資料。

## 調查範圍

1.5 是次調查涵蓋下列行業：

(A) **印刷業**

HSIC 581201 - 報紙印刷

HSIC 181100 - 商業印刷

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

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

HSIC 829300 - 印務代理

選定機構

(B) **出版業**

HSIC 581100、 - 出版及有關活動  
581202、581900

HSIC 460423 - 書報及期刊批發

HSIC 451423、 - 書報及期刊進出口貿易  
452423

選定機構

註： HSIC 是指「香港標準行業分類」

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、印刷設備供應商、金屬罐製造商，以及僱有出版人員的公私營機構。

1.7 根據上文第 1.5 段所列的分類，統計處共錄得 4 304 間印刷機構及 1 163 間出版機構。按 HSIC 分類法，業內機構的分布情況見表 1.1、表 1.2 及圖 1.1 和圖 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
HSIC 581201 - 報紙印刷	34	0.8%
HSIC 181100 - 商業印刷	2 386	55.4%
HSIC 181201、181202、181299 - 印刷及有關活動	308	7.2%
HSIC 170201、170202 - 容器、紙盒及紙板盒 (只限於印刷相關活動)	187	4.3%
HSIC 829300 - 印務代理	1 322	30.7%
選定機構	67	1.6%
總計	4 304	100%

**圖 1.1： 各門類印刷機構的分布情況**

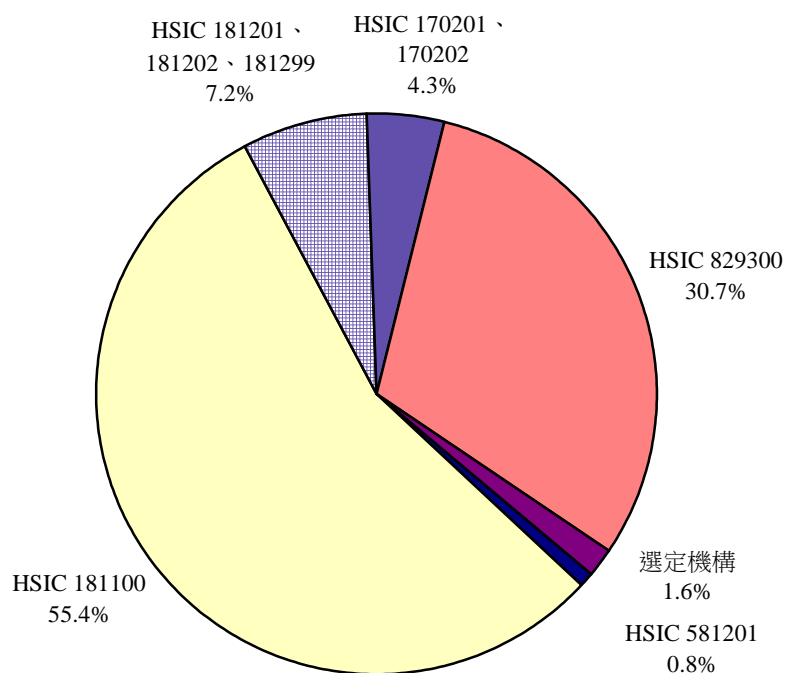
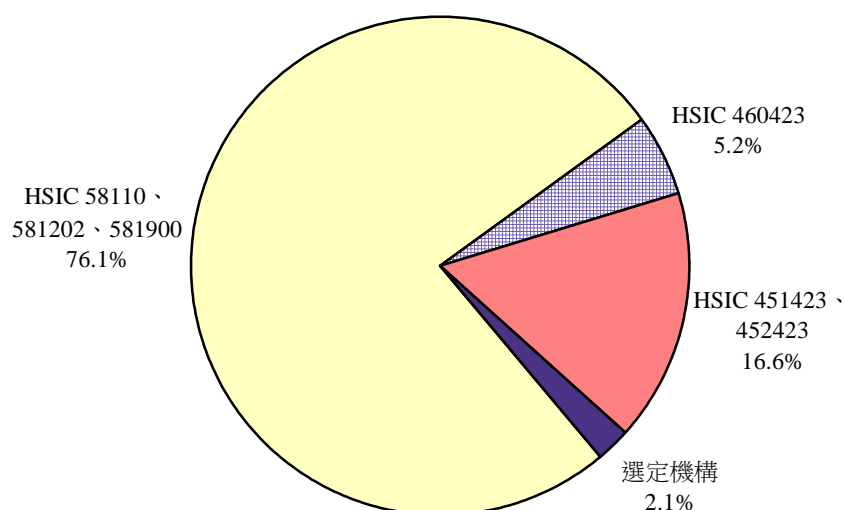




表 1.2： 出版業機構的分布情況（HSIC 分類）

門類	機構數目	佔機構總數百分率
HSIC 58110、581202、581900 – 出版及有關活動	885	76.1%
HSIC 460423 - 書報及期刊批發	61	5.2%
HSIC 451423、452423 - 書報及期刊進出口貿易	193	16.6%
選定機構	24	2.1%
總計	1 163	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 632 間印刷及相關機構（包括教育培訓機構及政府的印刷部門／代理公司），以及 276 間出版機構作為調查對象。

## **宣傳**

1.9 在進行實地調查之前，本會曾於本地報章進行宣傳，並獲下列商會協助，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) 中英文教出版事業協會；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郵寄予兩大行業的選定機構（詳情見附錄 3、4）。

1.11 實地調查期間，統計處調查人員登門造訪選定機構，收取填妥的調查表，按需要解答問題及協助僱主完成問卷。

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 908 間機構中，共有 697 間提供人力資料；93 間機構已結業、搬遷或不再從事印刷及出版行業；31 間機構拒絕提供資料。調查的有效回應率為 95.6%。

## **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，以及配合人力需求的建議措施。在本報告書內，「僱員」一詞是指受僱於 53 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，2012年5月中至10月中，印刷業26個主要職務共有18 365名僱員，出版業27個主要職務則有9 900名。按門類劃分，「報紙印刷」有516名、「商業印刷」有11 164名、「其他印刷及有關活動」有1 461名、「容器、紙盒及紙板盒」有355名、「印務代理」有3 729名、「選定機構」有1 140名。出版業方面，「出版及有關活動」有僱員8 486名、「書報及期刊批發」有189名、「書報及期刊進出口貿易」有886名、「選定機構」有339名。按技能等級劃分，印刷業有1 243名技師／管理人員、7 962名技術員、7 891名技工、1 269名非技術人員。出版業則有1 633名經理、3 356名主任、4 911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；各門類及技能等級的僱員分布詳載於表2.1、表2.2及圖2.1至圖2.4：

表2.1： 印刷業僱員的分布情況  
(按門類及技能等級劃分)

門類	技能等級				總計	佔僱員總數百分率
	技師／管理	技術員／督導	技工	非技術人員		
報紙印刷	15	91	381	29	516	2.8%
商業印刷	642	3 203	6 308	1 011	11 164	60.8%
其他印刷及有關活動	54	723	616	68	1 461	8%
容器、紙盒及紙板盒	25	72	233	25	355	1.9%
印務代理	388	3 234	87	20	3 729	20.3%
選定機構	119	639	266	116	1 140	6.2%
總計	1 243	7 962	7 891	1 269	18 365	100%
佔僱員總數百分率	6.8%	43.3%	43%	6.9%	100%	

圖 2.1： 印刷業各門類僱員的分布情況

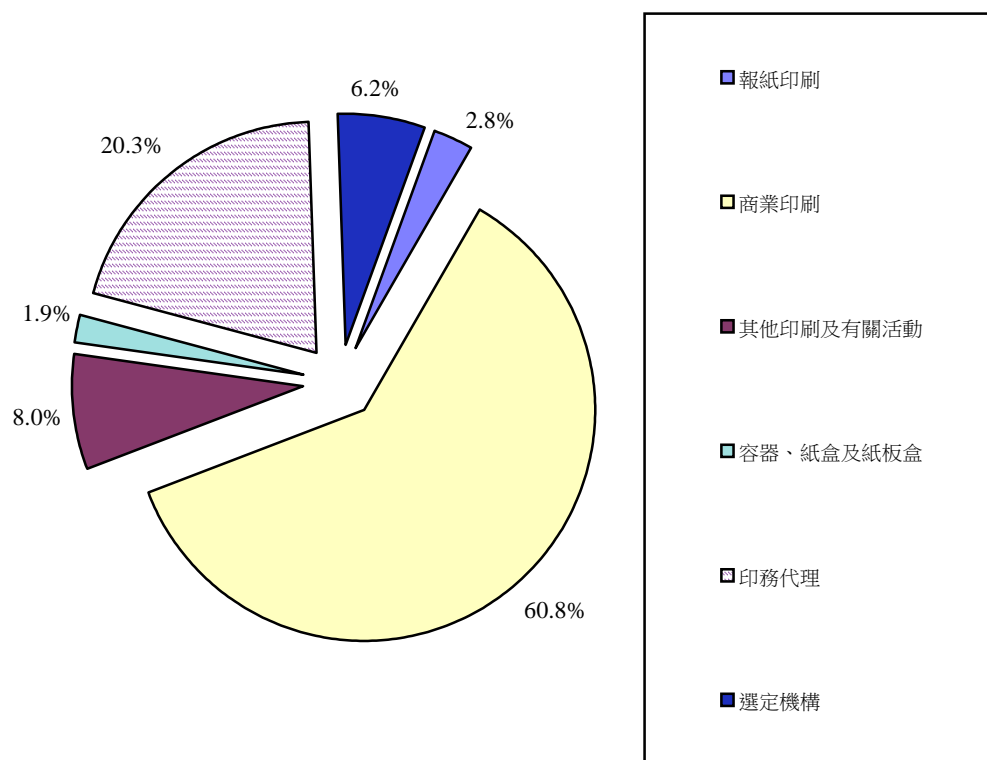
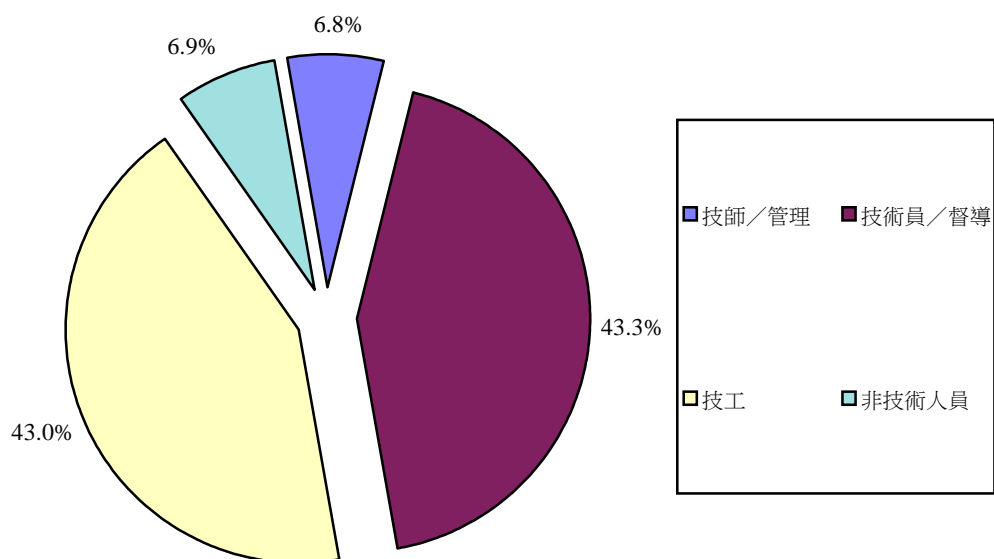


圖 2.2： 印刷業各技能等級僱員的分布情況



**表 2.2：** 出版業僱員的分布情況  
(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	佔僱員總數百分率
出版及有關活動	1 364	2 867	4 255	8 486	85.7%
書報及期刊批發	27	43	119	189	1.9%
書報及期刊進出口貿易	167	299	420	886	9.0%
選定機構	75	147	117	339	3.4%
總計	1 633	3 356	4 911	9 900	100%
佔僱員總數百分率	16.5%	33.9%	49.6%	100%	

**圖 2.3：** 出版業各門類僱員的分布情況

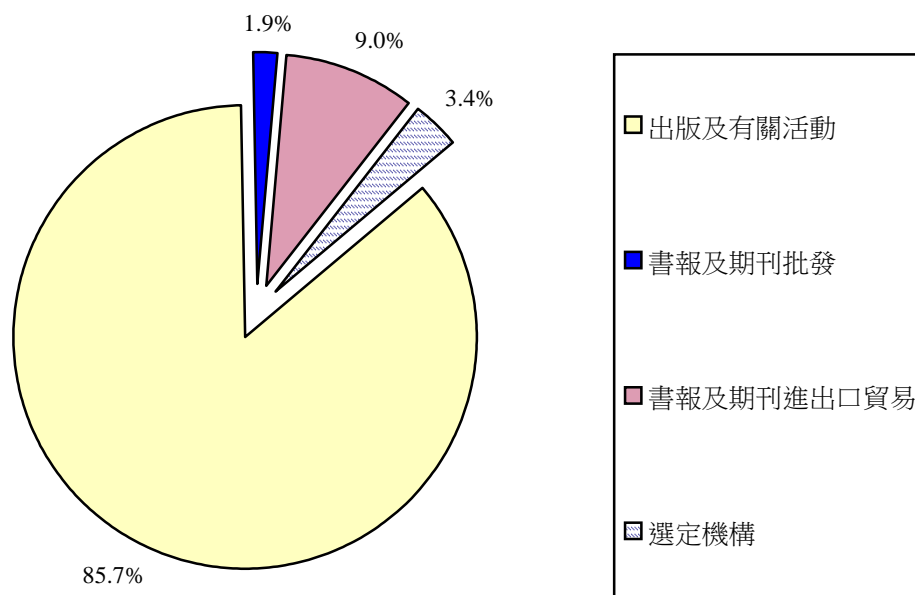
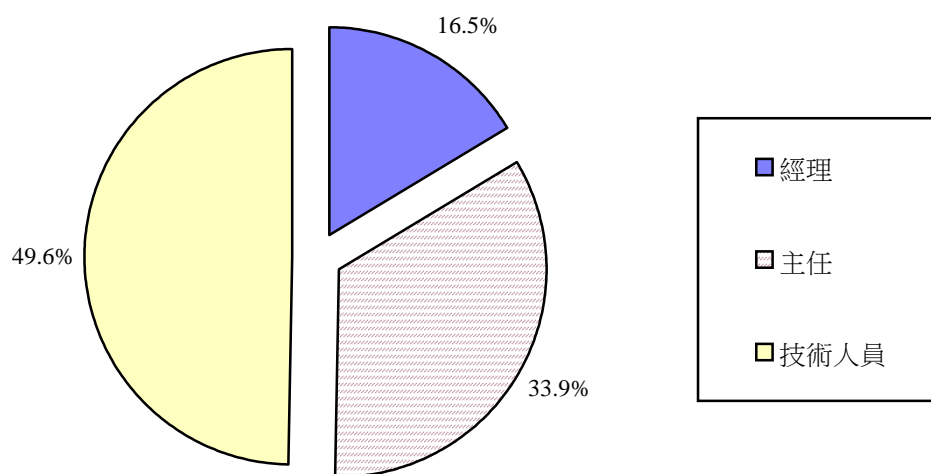


圖 2.4： 出版業各技能等級僱員的分布情況



2.2 根據過往的調查資料（包括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人力調查的結果），以及本會的人力調查資料，得出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的分布情況  
（1990 年至 2012 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

\* 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。2006 年調查刪除了操作工級的主要職務。

圖 2.5： 印刷業各技能等級僱員的分布情況  
(1990 年至 2012 年人力調查)

僱員人數

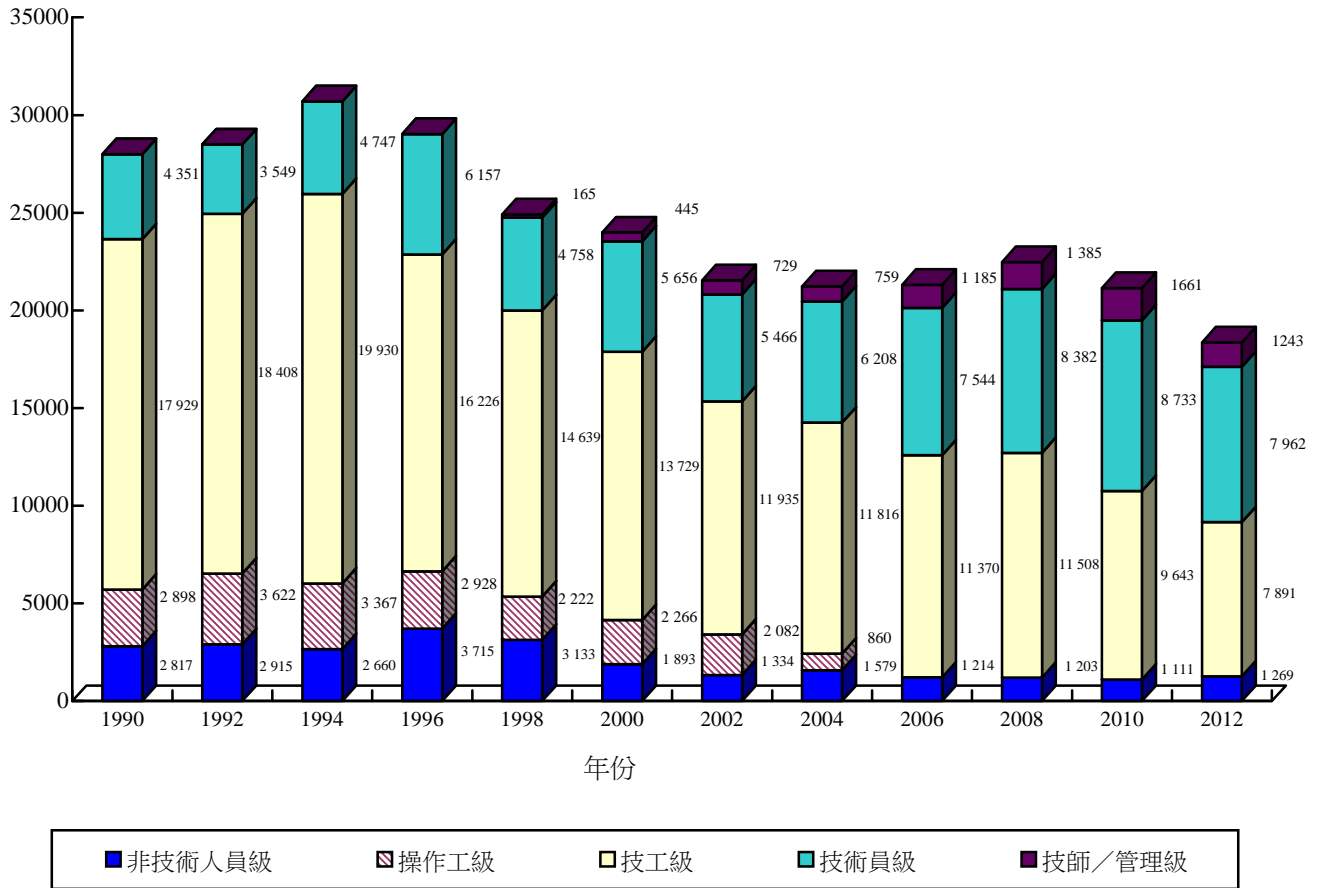
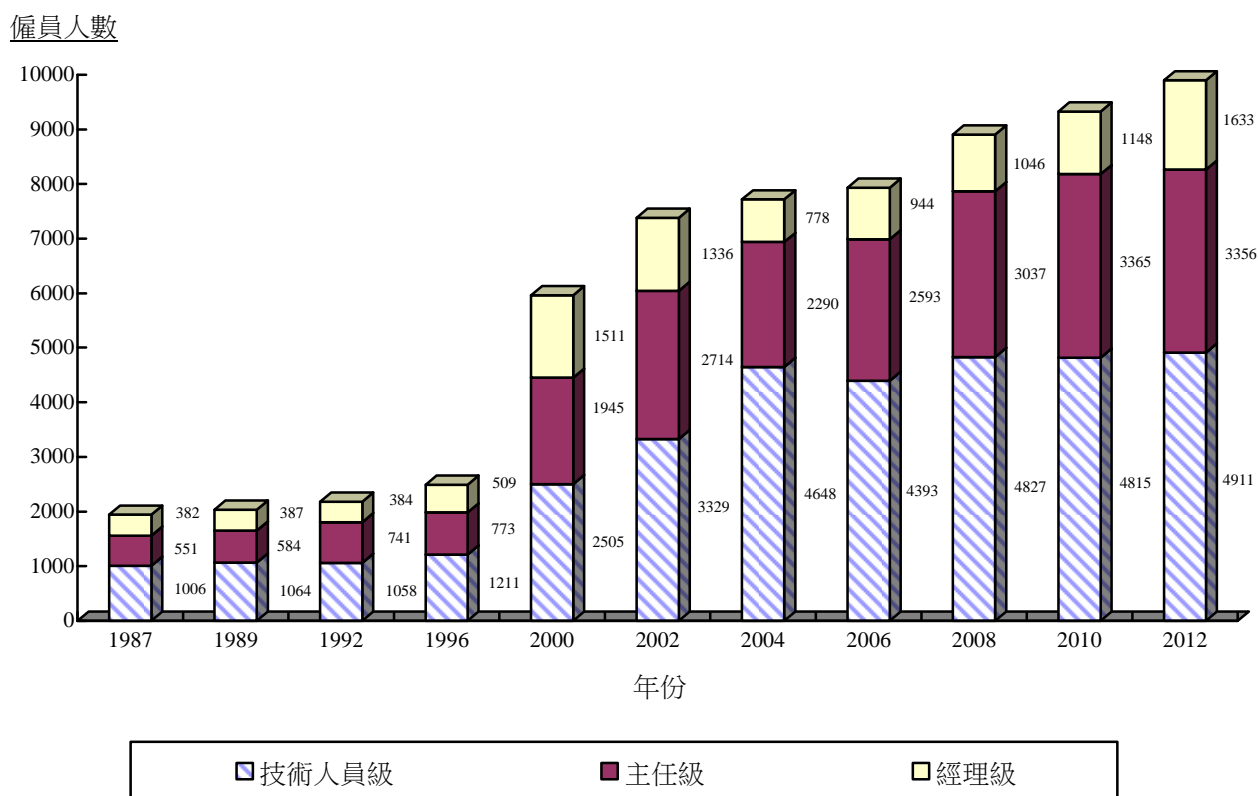




表 2.4： 出版業各技能等級僱員的分布情況  
(1987 年至 2012 年人力調查)

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

圖 2.6： 出版業各技能等級僱員的分布情況  
(1987 年至 2012 年人力調查)



## 受訓者人數

2.3 調查期間，印刷業共有 6 名受訓者，佔僱員總數 0.03%；出版業則無受訓者（0%）。受訓者的詳細統計資料載於附錄 5 及附錄 6；各門類及技能等級的受訓者分布詳情則列載於表 2.5：

**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
報紙印刷	-	-	-	-	-	-
商業印刷	-	2	4	-	6	0.05%
其他印刷及有關 活動	-	-	-	-	-	-
容器、紙盒及紙 板盒	-	-	-	-	-	-
印務代理	-	-	-	-	-	-
選定機構	-	-	-	-	-	-
總計	-	2	4	-	6	0.03%
佔同一技能等級 僱員總數百分率	-	0.03%	0.05%	-	0.03%	

## 空缺數目

2.4 調查期間，印刷業共有 157 個職位空缺，佔僱員總數 0.9%；出版業則有 112 個，佔僱員總數 1.1%。兩個行業的職位空缺統計數字分別載於附錄 5 及附錄 6；各門類及技能等級的空缺分布則列載於表 2.6 及表 2.7：

**表 2.6： 印刷業的空缺分布情況  
(按門類及技能等級劃分)**

門類 \ 技能等級	技能等級					總計	佔同一門類 僱員總數百分率
	技師／管理	技術員	技工	非技術人員			
報紙印刷	-	1	20	-		21	4.1%
商業印刷	-	38	41	1		80	0.7%
其他印刷及有關活動	-	2	-	-		2	0.1%
容器、紙盒及紙板盒	-	7	-	-		7	2.0%
印務代理	3	35	-	-		38	1.0%
選定機構	-	-	6	3		9	0.8%
總計	3	83	67	4		157	0.9%
佔同一技能等級 僱員總數百分率	0.2%	1.0%	0.9%	0.3%		0.9%	

**表 2.7： 出版業的空缺分布情況  
(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
出版及有關活動	2	13	50	65	0.8%
書報及期刊批發	-	-	2	2	1.0%
書報及期刊進出口貿易	-	8	35	43	4.9%
選定機構	-	2	-	2	0.6%
總計	2	23	87	112	1.1%
佔同一技能等級 僱員總數百分率	0.1%	0.7%	1.8%	1.1%	

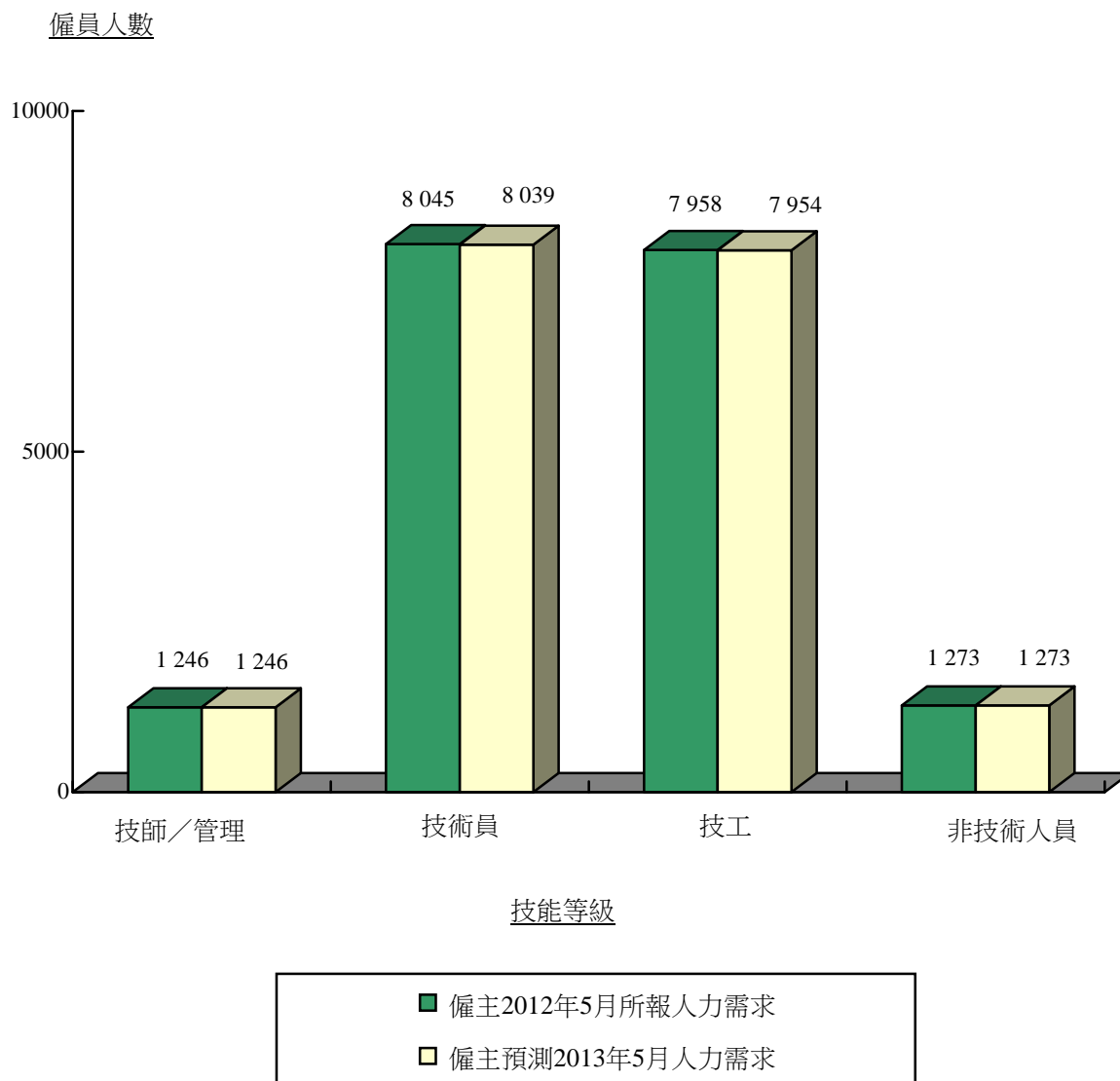
### 預測至 2013 年 5 月時的僱員人數

2.5 僱主預測，至 2013 年 5 月時，印刷業和出版業將分別有僱員 18 512 人和 10 009 人。兩個行業的人力預測詳情分別載於附錄 5 及附錄 6；按技能等級劃分的預測數字則列載於表 2.8 及表 2.9：

**表 2.8： 僱主意見：印刷業人力需求（2012 年 5 月時）  
及人力預測（至 2013 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 2013 年 5 月 僱員總數	預測僱員增 (+) ／減 (-) 人數
技師／管理	1 243	3	1 246	1 246	-
技術員／督導	7 962	83	8 045	8 039	- 6
技工	7 891	67	7 958	7 954	- 4
非技術人員	1 269	4	1 273	1 273	-
總計	18 365	157	18 522	18 512	- 10

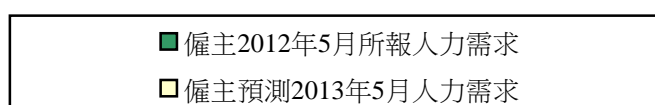
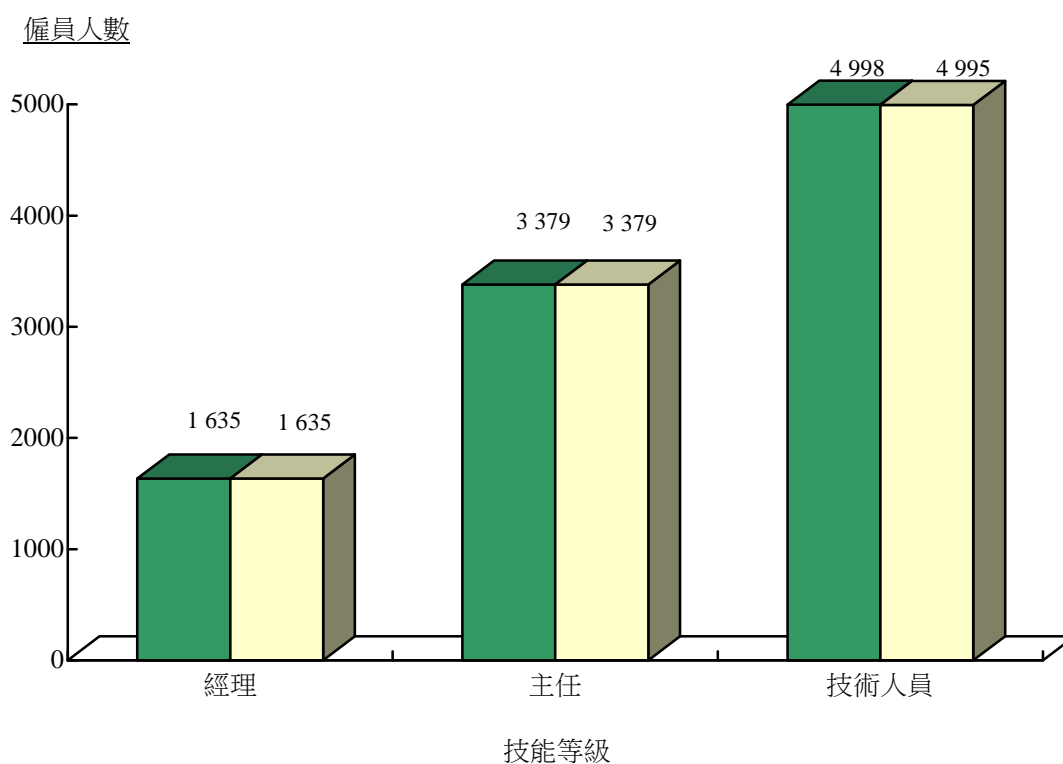
圖 2.7： 人力需求數字比較  
(2012年5月與2013年5月)



**表 2.9： 僱主意見：出版業人力需求（2012 年 5 月時）  
及人力預測（至 2013 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 2013 年 5 月 僱員總數	預測僱員增 (+) ／減 (-) 人數
經理	1 633	2	1 635	1 635	-
主任	3 356	23	3 379	3 379	-
技術人員	4 911	87	4 998	4 995	-3
總計	9 900	112	10 012	10 009	-3

**圖 2.8： 人力需求數字比較  
（2012 年 5 月與 2013 年 5 月）**



## 僱員宜有的教育程度

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的教育程度如表 2.10 和表 2.11 所示：

**表 2.10： 印刷業僱員宜有教育程度**

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／中五至中七程度
技工	技工證書／中五以下程度

**表 2.11： 出版業僱員宜有教育程度**

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

## 僱員宜有的訓練期

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的訓練期如表 2.12 和表 2.13 所示：

**表 2.12： 印刷業僱員宜有訓練期**

技能等級	宜有訓練期
技師／管理	兩年至四年
技術員／督導	兩年至三年
技工	一年至三年

**表 2.13： 出版業僱員宜有訓練期**

技能等級	宜有訓練期
經理	四年或以上
主任	兩年至四年
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。

### **僱員宜有的訓練形式**

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 2.14 和表 2.15：

**表 2.14： 印刷業僱員宜有訓練形式**

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 2.15： 出版業僱員宜有訓練形式**

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 2.16 及表 2.17：

**表 2.16： 印刷業僱員分布情況  
(按每月總收入幅度劃分)**

技能等級	\$6,500 或以下	\$6,501 - \$8,000	\$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	-	-	3	42	244	532	193	61	48	120	1 243
技術員／ 督導	180	134	806	3 043	2 605	578	23	24	26	543	7 962
技工	67	271	1 984	4 646	265	23	10	-	625	-	7 891
非技術人員	6	266	768	99	-	-	-	-	-	130	1 269
總計	253	671	3 561	7 830	3 114	1 133	226	85	1 418	74	18 365
佔僱員總數 百分率	1.38%	3.65%	19.39%	42.64%	16.96%	6.17%	1.23%	0.46%	7.72%	0.40%	100%

**表 2.17： 出版業僱員分布情況  
(按每月總收入幅度劃分)**

技能等級	\$6,000 或以下	\$6,001 - \$8,000	\$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	-	-	-	27	55	480	547	159	120	245	1 633
主任	68	67	8	253	1 389	944	191	25	30	381	3 356
技術人員	9	10	574	2 041	1 080	160	102	1	20	914	4 911
總計	77	77	582	2 321	2 524	1 584	840	185	170	1 540	9 900
佔僱員總數 百分率	0.78%	0.78%	5.88%	23.44%	25.49%	16.00%	8.48%	1.87%	1.72%	15.56%	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 印刷業和出版業的整體技術與非技術僱員分布情況載於表 2.18：

**表 2.18： 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	18 365	6 708	25 073	73.2%
出版業	9 900	4 752	14 652	67.6%
總計	28 265	11 460	39 725	71.2%

## 僱主預期來年業務變動情況

2.15 調查顯示，約 49.8% 印刷業僱主及 70.1% 出版業僱主預期來年的業務狀況會維持不變甚或好轉。僱主的意見分布見表 2.19 及表 2.20。

**表 2.19： 印刷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 至 9 人	36	1 500	1 676	6	3 218
10 至 49 人	38	213	153	5	409
50 人或以上	5	44	5	4	58
總計	79	1 757	1 834	15	3 685
佔公司總數百分率	2.1%	47.7%	49.8%	0.4%	100%

**表 2.20： 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 至 9 人	72	537	275	0	884
10 至 49 人	26	134	49	10	219
50 人或以上	9	37	6	8	60
總計	107	708	330	18	1 163
佔公司總數百分率	9.2%	60.9%	28.4%	1.6%	100%

### **派駐港外工作的印刷業僱員人數**

2.16 據僱主填報，調查進行前十二個月內，獲派駐香港以外地方工作超過六個月的僱員人數如下：

**表 2.21： 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	110	1 243	8.8%
技術員	123	7 962	1.5%
技工	33	7 891	0.4%
總計	266	17 096	1.6%

## 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 1 163 間公司中，77 間在中國內地設有廠房，共聘用 633 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 2.22： 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	123	1 633
主任	194	3 356
技術人員	316	4 911
總計	633	9 900

## 印刷業僱員晉升人數

2.18 調查顯示，106 名印刷業僱員獲晉升，分布情況如下：

**表 2.23： 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	
報紙印刷	-	2	17	19
商業印刷	8	18	5	31
其他印刷及有關活動	-	-	-	-
容器、紙盒及紙板盒	-	-	-	-
印務代理	2	6	26	34
選定機構	5	6	11	22
總計	15	32	59	106

## 出版業僱員晉升人數

2.19 調查顯示，80 名出版業僱員獲晉升，分布情況如下：

表 2.24： 出版業僱員晉升人數

技能等級 門類	經理	主任	技術人員	總計
出版及有關活動	17	45	14	76
書報及期刊批發	-	-	-	-
書報及期刊進出口貿易	1	1	0	2
選定機構	1	-	1	2
總計	19	46	15	80

## 印刷業的主要招聘困難

2.20 印刷業僱主報稱招聘時遇到的主要困難如下：

**表 2.25： 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	過去十二個月並未進行招聘的公司數目
報紙印刷	3	-	6
商業印刷	124	88	1 416
其他印刷及有關活動	16	8	303
容器、紙盒及紙板盒	-	-	132
印務代理	6	45	1 468
選定機構	2	4	47
總計	151	145	3 372

**表 2.26： 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	2	24	1	2	20	-	-	-	49
技術員／督導	12	17	1	1	10	5	3	2	51
技工	49	33	4	-	59	34	-	4	183
總計	63	74	6	3	89	39	3	6	283

## 出版業的主要招聘困難

2.21 出版業僱主報稱招聘時遇到的主要困難如下：

表 2.27： 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	過去十二個月並未進行招聘的公司數目
出版及有關活動	37	145	697
書報及期刊批發	2	7	52
書報及期刊進出口貿易	29	17	137
選定機構	-	11	12
總計	68	180	898

表 2.28： 出版業遇到的主要招聘困難

門類 \ 原因	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	6	2	1	5	-	1	4	23
主任	4	15	11	10	21	1	1	15	78
技術人員	15	15	12	15	20	1	1	-	79
總計	23	36	25	26	46	2	3	19	180

## 印刷業僱員所需的培訓

2.22 為迎合各方面的轉變，在未來十二個月，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 2.29： 印刷業僱員所需的首三項重要培訓範疇**

技能等級	須加強的首三項重要技能／知識	
	排名	技能／知識
技師／管理	1	印刷技術
	2	普通話
	3	媒體科技
技術員／督導	1	普通話
	2	電子商貿的知識及應用／電腦圖像處理與網頁設計
	3	英語會話
技工	1	印刷技術
	2	印前技術
	3	印後技術

## 出版業僱員所需的培訓

2.23 為迎合各方面的轉變，在未來十二個月，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 2.30： 出版業僱員所需的首三項重要培訓範疇**

技能等級	須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	媒體科技／客戶服務
	3	英語會話
主任	1	英語會話
	2	媒體科技
	3	電腦圖像處理與網頁設計
技術人員	1	電腦圖像處理與網頁設計
	2	媒體科技
	3	電子商貿的知識及應用

2.24 印刷業和出版業僱員須加強的技能／知識詳載於附錄 15 及附錄 16。



## 出版業－電子出版

2.25 調查顯示，出版業有 260 間機構從事電子出版業務，其中網上出版佔 256 間，以資料光碟[CD-ROM]形式出版佔 17 間。此外，903 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 2.31： 從事電子出版的僱員人數**

門類	網上出版	資料光碟	僱員人數
出版及有關活動	244	15	941
書報及期刊批發	-	-	-
書報及期刊進出口貿易	-	-	-
選定機構	12	2	47
總計	256	17	988

## 第三章

### 結論

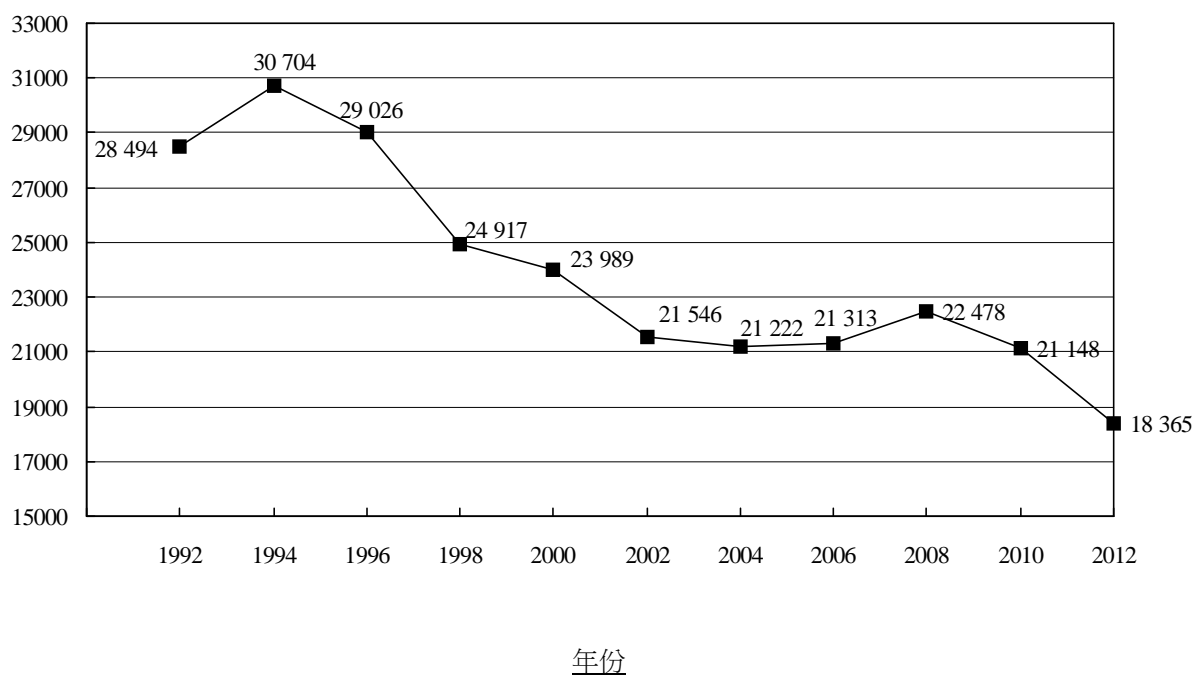
3.1 本會詳細審閱是次調查結果後，認為所得資料大致能反映印刷及出版業在調查期間的人力情況。

3.2 與上次2010年5月的調查結果比較，是次調查顯示印刷業僱員人數每年下降6.8%，由21 148人減至18 365人；而出版業的僱員人數，每年的增幅卻有3.0%，由9 328人增至9 900人。圖3.1和圖3.2展示印刷及出版業從1992年至2012年間的整體人力狀況。

#### (A) 印刷業

圖 3.1 : 印刷業的人力狀況 (1992 年至 2012 年)

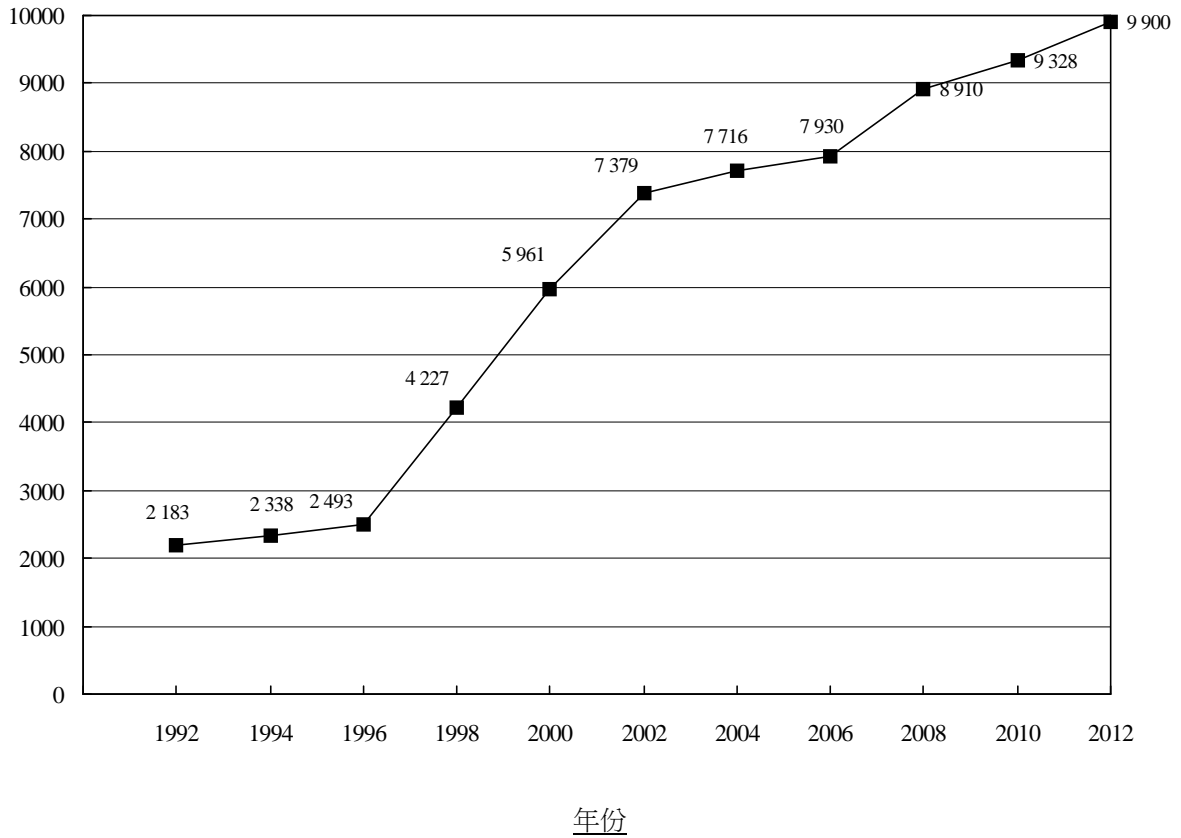
僱員人數



(B) 出版業

圖 3.2 : 出版業的人力狀況 (1992 年\* 至 2012 年)

僱員人數



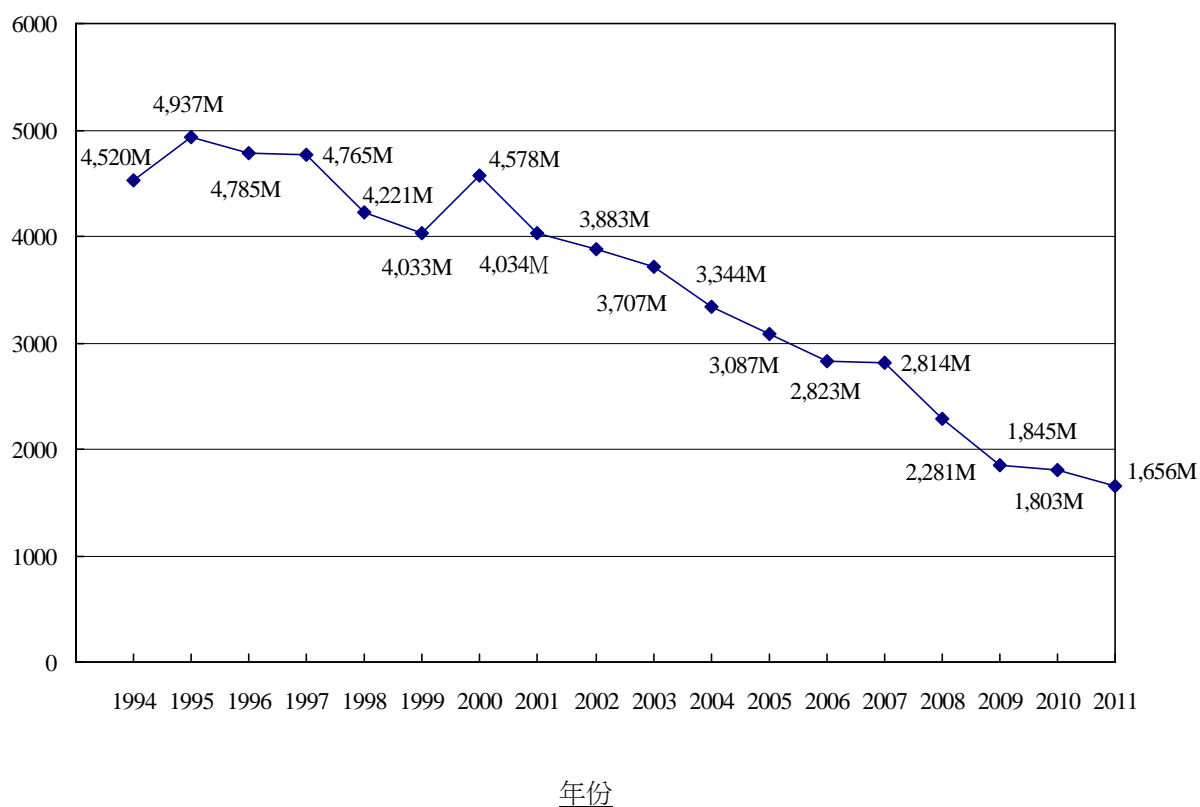
\* 相對於前廣告、公共關係及出版業訓練委員會 1992 年及1996 年的調查，2000 年的人力調查範圍已擴大。

## 印刷業的業務表現

3.3 印刷品的本地出口總值由 2000 年的 45.78 億元，逐漸下降至 2009 年的 18.45 億元，再降至 2011 年的 16.56 億元。1994 年至 2011 年間印刷品本地出口總值見下圖 3.3。

圖3.3 : 印刷品本地出口總值 (1994 年至 2011 年)

港幣百萬元(M)

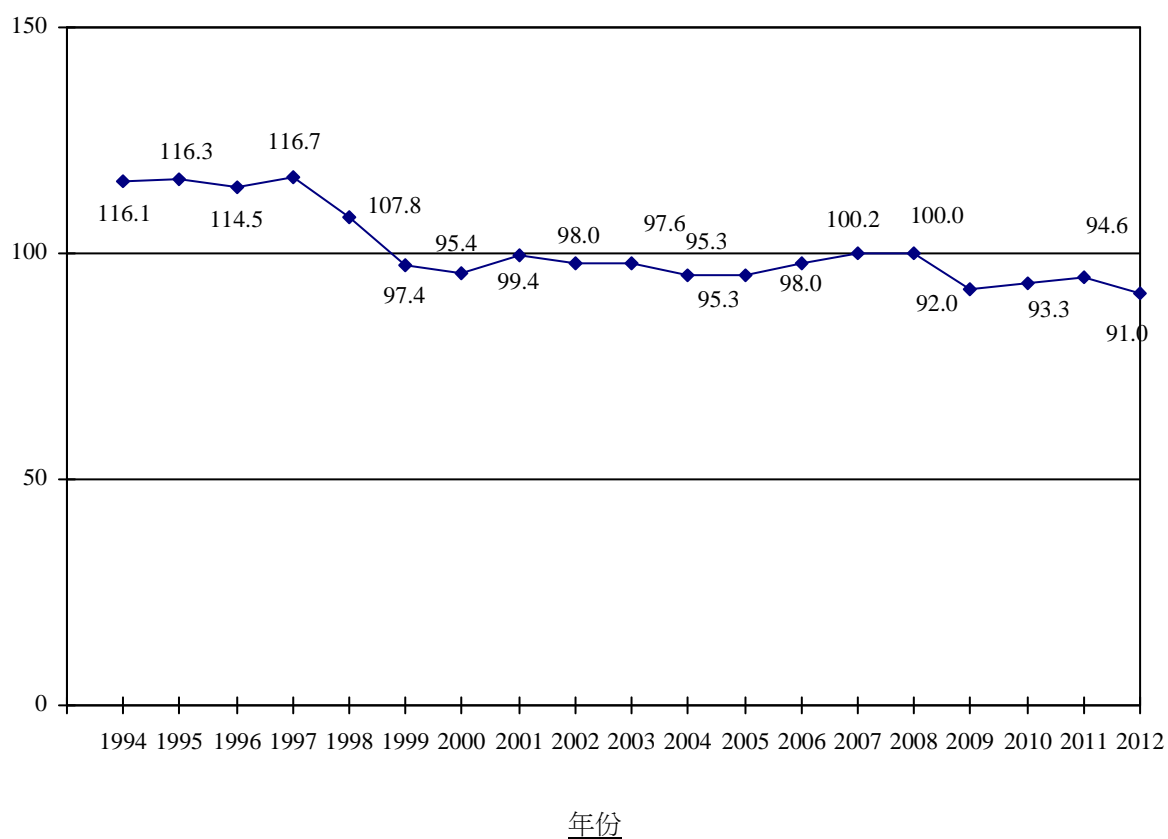


資料來源：政府統計處《香港貿易統計》

3.4 印刷行業的生產指數由 2008 年（基準年）的 100，降至 2012 年的 91，反映過去數年本地的紙品及印刷品生產量下降（見下圖 3.4）。

圖 3.4: 紙品及印刷品生產指數

指數.  
(2008 年= 100)



來源：政府統計處

註：「生產指數」計算的是實質本地生產量的變化，即撇除價格變動因素的本地生產量變化。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 段及第 3.4 段的數據反映印刷業繼續轉移到中國內地發展業務，情況大致上已告穩定。

## 各門類的人力變化

### (A) 印刷業

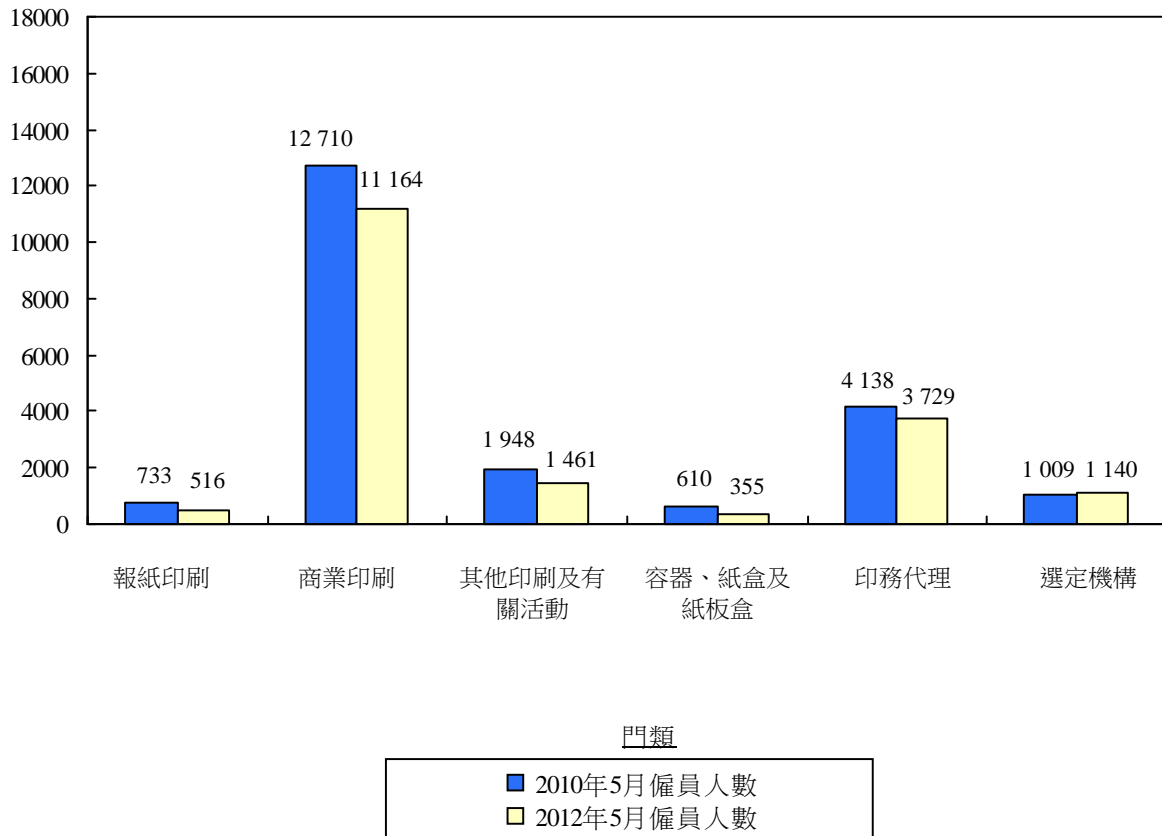
3.6 2010年5月至2012年5月期間，業內各門類的人力變化見下表3.1及下圖3.5：

**表 3.1： 印刷業各門類人力變化  
(2010年5月至2012年5月)**

門類	2010年5月 僱員人數	2012年5月 僱員人數	每年變化 百分率
報紙印刷	733	516	-16.1%
商業印刷	12 710	11 164	- 6.3%
其他印刷及有關活動	1 948	1 461	- 13.4%
容器、紙盒及紙板盒	610	355	- 23.7%
印務代理	4 138	3 729	- 5.1%
選定機構	1 009	1 140	+ 6.3%
總計	21 148	18 365	- 6.8%

圖3.5： 印刷業各門類人力變化  
(2010年5月至2012年5月)

僱員人數



3.7 調查所見，選定機構的技術僱員由 2010年 5 月的1 009人，增至 2012 年 5 月的 1 140人，每年增幅為 6.3 %，原因是參與調查的選定機構愈來愈多，部分機構聘用更多技術僱員擔任相關職位。

3.8 自 2010年 5 月調查後，印刷業經營困難，印刷品的本地出口總值由 2009年的18.45億元，逐漸下降至2011年的16.56億元（見第3.3段）。2012年5月調查所得，首五個門類的公司數目為4 237間，較2010年5月調查時減少240間。印刷從業員因而減少，五個門類的人數每年下降，幅度由5.1%擴大至23.7%。

3.9 隨著電子出版持續增長，讀者可於網上訂購及閱讀報刊、書籍及其他資訊；而購買和閱讀印刷本的讀者人數過去幾年均下跌。結果印刷業相關門類的人力亦告下降。

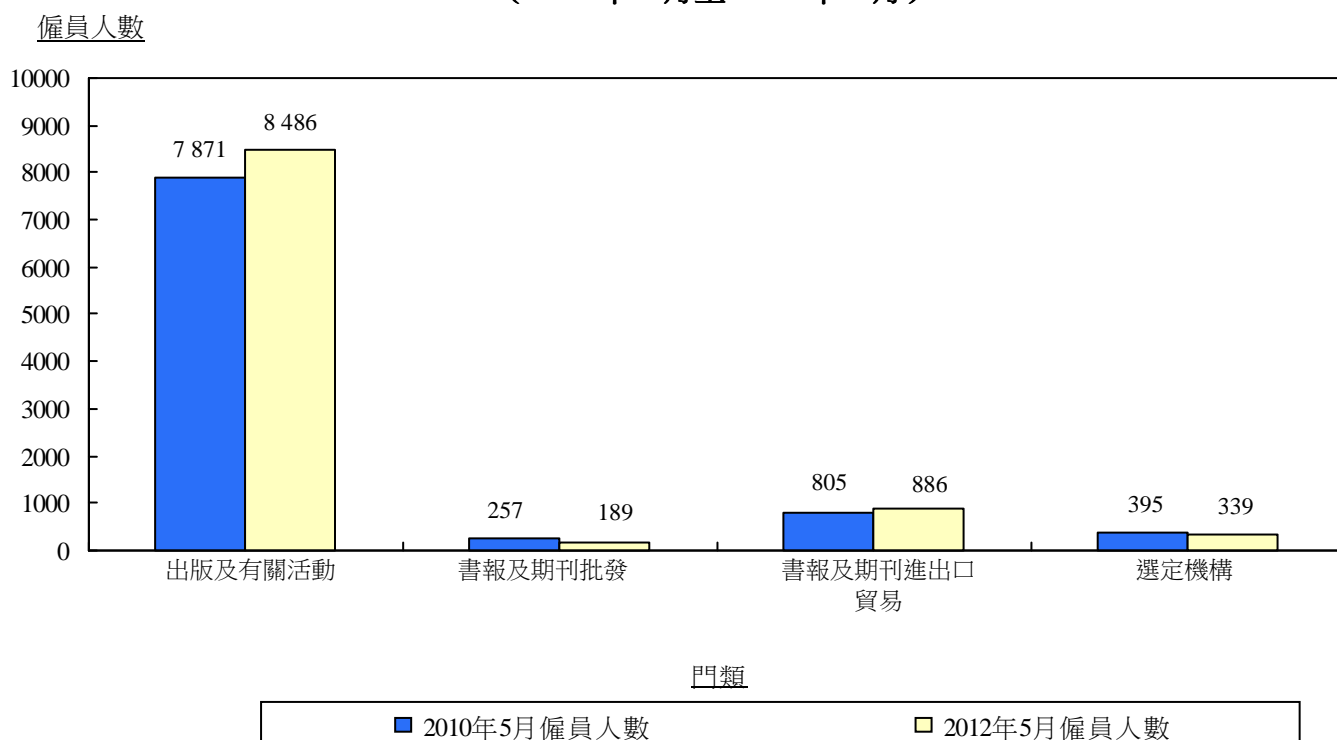
## (B) 出版業

3.10 2010年5月至2012年5月期間，業內各門類的人力變化見下表3.2及下圖3.6：

表 3.2： 出版業各門類人力變化  
(2010年5月至2012年5月)

門類	2010年5月 僱員人數	2012年5月 僱員人數	每年變化 百分率
出版及有關活動	7 871	8 486	+ 3.8%
書報及期刊批發	257	189	- 14.2%
書報及期刊進出口貿易	805	886	4.9%
選定機構	395	339	- 7.4%
總計	9 328	9 900	+ 3.0%

圖3.6： 出版業各門類人力變化  
(2010年5月至2012年5月)



3.11 調查數據顯示，過去兩年，書店及出版社有所增加，是出版及有關活動門類人力上升的主因，僱員由2010年5月的7 871人，增至2012年5月的8 486人，每年增幅為3.8%。由於書報及期刊進出口貿易公司的數目亦有增加，僱員人數每年增幅為4.9%。另一方面，同期由於讀者人數下降，書報及期刊批發門類的僱員由257人大減至189人，減幅達14.2%；部分大型出版社縮減規模，選定機構門類的人力亦下降，每年減幅為7.4%。



## 印刷業各技能等級的人力變化

### 印刷業

3.12 印刷業 2010 年至 2012 年各技能等級的人力變化見下表 3.3:

**表 3.3： 印刷業各技能等級的人力變化  
(2010 年 5 月及 2012 年 5 月)**

技能等級	2010 年 5 月 僱員人數	2012 年 5 月 僱員人數	每年變化 百分率
技師／管理	1 661	1 243	- 13.5%
技術員／督導	8 733	7 962	- 4.5%
技工	9 643	7 891	- 9.5%
非技術人員	1 111	1 269	+ 6.9%
總計	21 148	18 365	- 6.8%

### 技師／管理級

3.13 調查結果顯示，業內技師／管理級僱員由 2010 年的 1 661 人，減少至 2012 年的 1 243 人，每年減幅為 13.5%。2010 年 5 月進行上一次調查後，出版業經營困難；公司數目下跌；三類技能等級的技術僱員人數整體下跌。人力變化見下表 3.4:

**表 3.4： 技師／管理級主要職務人力變化  
(2010 年 5 月至 2012 年 5 月)**

主要職務	2010 年 5 月 僱員人數	2012 年 5 月 僱員人數	每年變化 百分率
總經理	363	345	- 2.5%
生產經理／廠務經理／ 品質經理	407	313	- 12.3%
營業／客戶服務／ 市場推廣經理	837	526	- 20.7%
採購經理	30	36	+ 9.5%
資訊科技經理（印刷）	24	23	- 2.1%
總計	1 661	1 243	- 13.5%

## 技術員級

3.14 調查亦顯示，技術員級僱員由 2010 年 5 月的 8 733 人，下降至 2012 年 5 月的 7 962 人，原因與第 3.13 段所述相同。人力變化見表 3.5：

**表 3.5： 技術員級主要職務人力變化  
(2010 年 5 月至 2012 年 5 月)**

主要職務	2010 年 5 月 僱員人數	2012 年 5 月 僱員人數	每年變化 百分率
印刷估價員 / 營業代表	5 136	4 459	-6.8%
生產策劃員 / 生產管制員/ 品質管制員	899	616	- 17.2%
督導員 / 管理員	479	507	+ 2.9%
機電維修 (印刷) 技術員	315	325	+ 1.6%
設計員 / 設計主任	565	475	- 8.3%
印前技術員及資訊科技(印 刷) 技術員	957	1 238	+ 13.7%
印刷物料採購員 / 控制員	146	156	+ 3.4%
技術 / 產品 (印刷) 技術 員	236	186	- 11.2%
總計	8 733	7 962	- 4.5%

## 技工級及操作工級

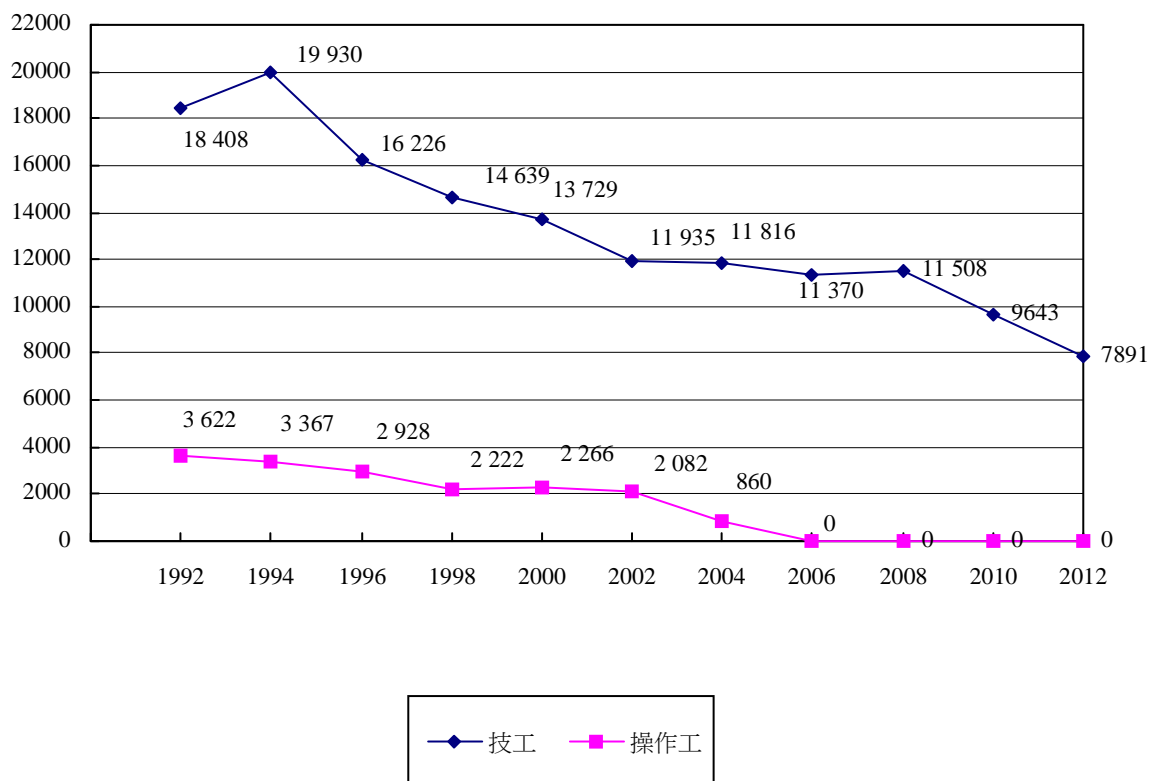
3.15 調查結果顯示，過去兩年間，技工級僱員人數每年下降 9.5%，操作工級職務自 2006 年已從調查範圍刪除。人力變化詳見下表 3.6 及圖 3.7：

**表 3.6: 技工級主要職務人力變化  
(2010 年 5 月至 2012 年 5 月)**

主要職務	2010 年 5 月 僱員人數	2012 年 5 月 僱員人數	每年變化 百分率
電子印前系統操作技工	937	626	- 18.3%
柯式版製作技工	585	848	+ 20.4%
數碼印刷系統操作技工	231	421	+ 35.0%
單張給紙式柯式平版機印刷 技工	4 286	3 174	- 13.9%
捲筒給紙式柯式平版機印刷 技工	719	696	- 1.6%
其他印刷機械及包裝印刷操 作技工	624	399	- 20.0%
裝訂技工	1 263	1 036	- 9.4%
啤盒工 / 造模工	293	214	- 14.5%
包裝盒完成機械工	214	171	- 10.6%
其他印後機械技工	491	306	- 21.1%
總計	9 643	7 891	- 9.5%

圖 3.7： 技工級及操作工級人力變化  
(1992 年 6 月至 2012 年 5 月)

僱員人數



## 出版業各技能等級的人力變化

3.16 出版業在 2010 年至 2012 年間各技能等級的人力變化見下表3.7:

**表 3.7： 出版業各技能等級的人力變化  
(2010 年 5 月至 2012 年 5 月)**

技能等級	2010 年 5 月 僱員人數	2012 年 5 月 僱員人數	每年變化 百分率
經理	1 148	1 633	+19.3%
主任	3 365	3 356	-0.1%
技術人員	4 815	4 911	1.0%
總計	9 328	9 900	+3.0%

### 經理級

3.17 調查顯示，經理級人手每年增加 19.3%。人力變化見下表 3.8:

**表 3.8： 經理級主要職務人力變化  
(2010 年 5 月至 2012 年 5 月)**

主要職務	2010 年 5 月 僱員人數	2012 年 5 月 僱員人數	每年變化 百分率
董事經理 / 總經理 / 出版人	277	354	+ 13.0%
總編輯 / 主編	217	409	+ 37.3%
設計總監 / 美術總監	85	142	+ 29.3%
# 製作總監 / 製作經理	57	83	+ 20.7%
市場總監 / 市場經理	142	200	+ 18.7%
營業總監 / 營業經理 (報刊)	112	210	+ 36.9%
營業總監 / 營業經理監事 (書刊)	70	95	+ 16.5%
編輯經理	175	114	- 19.3%
* 電子出版經理	13	26	+ 41.2%
總計	1 148	1 633	+ 19.3%

# 工作性質與印刷業主要職務「生產經理」相同。

\* 2010 年 5 月起新增主要職務。

## 主任級

3.18 調查亦顯示，出版業的主任級僱員人數輕微下跌，每年跌幅為 0.1%。人力變化詳見下表 3.9：

**表 3.9： 主任級主要職務人力變化  
(2010 年 5 月至 2012 年 5 月)**

主要職務	2010 年 5 月 僱員人數	2012 年 5 月 僱員人數	每年變化 百分率
策劃編輯 / 高級編輯	1 617	1 314	- 9.9%
設計師	436	570	+ 14.3%
# 製作主任	89	125	+ 18.5%
營業主任	716	770	+ 3.7%
市場 / 宣傳主任	167	202	+ 10.0%
客戶服務主任 (書籍)	182	132	- 14.8%
發行主任 (報刊)	142	99	- 16.5%
* 電子出版主任	16	144	+ 200%
總計	3 365	3 356	- 0.1%

# 工作性質與印刷業主要職務「督導員 / 管理員」相同。

\* 2010 年 5 月起新增職務。

## 技術人員級

3.19 調查顯示，過去兩年出版業的技術人員數目維持穩定。人力變化見下表 3.10：

**表 3.10： 技術人員級主要職務人力變化  
(2010 年 5 月至 2012 年 5 月)**

主要職務	2010 年 5 月 僱員人數	2012 年 5 月 僱員人數	每年變化 百分率
助理編輯 / 稿件編輯 / 美術編輯 / 校對員	1 509	1 569	+ 2.0%
美術設計員 / 插圖員	709	582	- 9.4%
△ 桌面排版操作員	361	411	+ 6.7%
# 製作助理	199	297	+ 22.2%
營業代表 / 營業主任	1 568	1 588	+ 0.6%
市務助理 / 宣傳助理	439	445	+ 0.7%
其他出版業有關職位 (電腦程式編寫員及設計 / 繪圖員)	30	19	- 20.4%
總計	4 815	4 911	+ 1.0%

# 工作性質與印刷業的技工相同。

△ 工作性質與印刷業的「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) 印刷業經營困難，調查數據顯示，業內公司的總數較 2010 年 5 月調查時少 244 間；導致印刷業技師 / 管理人員、技術員及技工的人數減少。每年減幅分別為 13.5%、4.5% 及 9.5%；
- (b) 印刷業技師 / 管理級各主要職務的人數減少，每年減幅由 2.1% 至 20.7%。原因是過去兩年，業內公司一般都縮減了業務規模。由於採用較低的基數 30，採購經理的人數則有所增加，每年增幅為 9.5% (過去兩年數字為 6)；

- (c) 由於印刷公司整體縮減業務規模，導致印刷估價員 / 營業代表、生產策劃員 / 生產管制員 / 品質管制員、設計員 / 設計主任的人數顯著減少，每年減幅分別為6.8%、17.2% 及 8.3%；
- (d) 從事技工級各項主要職務的人數減少，每年減幅由 1.6% 至 21.1%，原因與(c)所述相同；
- (e) 主要職務中，數碼印刷系統操作技工人數大增，每年增幅為 35.0%，反映數碼印刷持續增長；另一錄得顯著增幅的職務柯式版製作技工，每年增幅為 20.4%，可見柯式印刷對業務十分重要。

## (B) 出版業

- (a) 營業總監 / 營業經理監事（書刊）、董事經理 / 總經理 / 出版人、總編輯 / 主編的人力有顯著增加，每年增幅分別為16.5%、13.1% 及 37.3%；反映過去兩年有更多小型出版公司成立。然而，編輯經理的人力大幅減少，每年減幅為19.3%；申請職位的人數減少，部分原因可能是申請人認為薪酬並不特別吸引，另外部分原因是這一經理職級的空缺由編輯晉升而填補；
- (b) 過去兩年，多份免費報紙同期推出，導致製作總監 / 製作經理、營業總監 / 營業經理（報刊）、製作主任的人力顯著增加，每年增幅分別為 20.7%、36.9% 及 18.5%。客戶服務主任（書籍）及發行主任（報刊）的人力則顯著減少，每年減幅分別為 14.8% 及 16.5%。上司分擔了部分工作，加上愈來愈多讀者透過電子設備如智能手機及平板電腦在網上閱讀報刊，以致人力下降；
- (c) 調查期間，愈來愈多書籍採用特色設計，例如立體書，以及附有發聲、彩圖、影像和精美彩色封面等多媒體功能。因此，設計總監 / 美術總監及設計師的人手大增，每年增幅分別為 29.3% 及 14.3%。由於電子出版行業持續增長，經理級的電子出版經理及主任級的電子出版主任人數均大增，每年增幅分別為 41.2% 及 200%；
- (d) 調查又顯示，助理設計員 / 插圖員的人力每年減幅為 9.4%，但技術人員級的桌面排版操作員的每年增幅則為 6.7%。這主要是由於業務進一步電腦化，電腦繪圖逐步取代手繪，導致有關工作的人力減少；及
- (e) 製作助理的人力增幅顯著，每年達22.2%，主要是由於門類 1 – 出版行業的公司數目，由 2010 年的 1 179間大增至 2012 年的 1 243間。



## 人力數字與本會預測比較

### (A) 印刷業

3.21 下表 3.11 將實際人力數字（僱員人數加空缺數目）與本會在 2010 年的預測作一比較：

表 3.11： 2012 年人力數字與2010年人力預測比較

技能等級	2012年 實際人力數字	本會在2010年的 人力預測	人力預測與實際人 力數字比較
技師 / 管理	1 246	1 874	+ 33.5%
技術員	7 964	9 593	+ 17.0%
技工	7 895	10 224	+ 22.8%

3.22 本會兩年前對三個技能等級的人力需求的預測，較實際為高。上一次調查進行後，印刷業經營困難，技師 / 管理級、技術員級及技工級的人力，分別錄得每年13.5%、4.5% 及 9.5% 的跌幅。

### (B) 出版業

3.23 下表 3.12 將實際人力數字（僱員人數加空缺數目）與本會在 2010 年的預測作一比較：

表 3.12： 2012 年人力數字與2010年人力預測比較

技能等級	2012年 實際人力數字	本會在2010年的 人力預測	人力預測與實際人 力數字比較
經理	1 633	1 301	- 25.5%
主任	3 356	3 652	+ 8.1%
技術人員	4 911	5 166	+ 4.9%

3.24 本會所預測的人力需求，在經理級方面遠較實際人力為低；但對主任級及技術人員級較實際人力為高。經理級的預測及實際人手出現顯著落差，原因主要是小型出版社急速增長，帶動出較大需求。另外兩個級別的實際人力數字，與本會的預測頗為接近。

## 業務展望

### 概述

3.25 香港是全球第四大印刷中心。印刷業自 2011年第三季起經營困難，自《內地與香港關於建立更緊密經貿關係的安排》（CEPA）第七階段於 2010 年 5 月實施，港產貨品現時進入內地享有零關稅；加上中國 2011 年 3月公布《十二五規劃》，開放內地市場，仍然為香港的印刷公司締造不少商機。對於出版業來說，根據 CEPA補充協議七，香港服務供應商在中國內地設立的分銷公司，可發行香港出版的書籍。此舉有助出版業在內地擴展業務。

3.26 歐債危機、美國聯邦儲備局未來的決定取向及市場干預，以及中國內地高通脹，都影響到出版及印刷行業的發展。內地實施的《勞動合同法》和《加工貿易政策》，均對業界的營運成本構成重大影響。過往年間，環保意識逐漸普及，加上需遵行各項安全規定，中國及其他國家亦收緊有關環境的法例，令本港機構一直承受巨大壓力，而且預期未來仍然受壓。

3.27 此外，人民幣急速升值，工資、稅項及關稅上漲、能源及物料價格上揚等因素，將使營運成本居高不下。珠三角地區人力短缺又是一項挑戰。除了內地企業，本地公司一直以來還要面對亞洲其他製造商的激烈競爭。

3.28 香港電訊網絡發達，是印刷業及出版業的重要資產，有助數碼印刷及電子出版持續發展。透過衛星通訊，國際出版社可將文本、相片及高質素的影像，以電子方式傳送至在香港的辦事處，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。本會認為，印刷及出版公司會營運更多跨媒體業務，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 顧客要求優質而價格合理的服務已成趨勢；為滿足顧客要求，就需要提供既靈活又具創意的服務，這是印刷業及出版業公司要面對的挑戰。

### 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，並會從中受惠。中國內地已成為世界第二大印刷市場，業務持續增長。本會亦相信，內地龐大的印刷市場會為香港的印刷公司帶來雄厚商機。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，亦須生產多類別的印刷物料，面向不同類型的顧客；因此，對幹練技師級及技術員級別的人力需求，將會更多。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，亦是香港經濟的第三支柱工業。現時，愈來愈多海外顧客希望縮短生產周轉期和交貨時間，以賺取最大利潤。由於做到交貨快、取價具競爭力、品質高，以及能應付急單等要求，本會相信本地印刷公司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 相信數碼印刷會繼續增長，其應用範圍未來會顯著增加。世界各地顧客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，香港的印刷公司在傳統印刷設備之外，亦應裝備好迎接前面這些商機和挑戰。

3.33 電子出版日漸普及，仍會對印刷業構成威脅。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。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 預計包裝印刷會持續增長，對傳統印刷業務提供主要支持。另一方面，雖然數碼印刷增長快速，但柯式印刷仍有大量需求。從2012年國際印刷與紙業展覽會 Drupa 所見柯式印刷和數碼印刷的最新技術發展，兩者將互補優勢，而非彼此競爭。

## 出版業

3.35 電子出版將成為出版業未來的發展趨勢。不過，業內並未有一套固定的業務模式。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。這些出版社面對一項挑戰，就是制訂有效率及高質素的出版流程。因應上述形勢，加上市民一般仍保留閱讀印刷本的習慣，本會預計，電子出版業未來數年會穩步發展。

3.36 隨著 2010年成功推行《學校電子學習試驗計劃》，香港政府教育局在 2012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，以制定一份完善和適用於電子教科書的建議書目表。根據 EMADS 開發的電子教科書，預計於 2014至 2015 學年可供使用。此項計劃將為本港出版公司帶來鉅大商機。

3.37 為配合新高中「334」教育改革，需要重新編寫教科書及相關教材，出版及相關行業的人力需求將有增加。

3.38 另一方面，近年智能手機、平板電腦及其他無線電子通訊設備的普及，催生了愈來愈多的電子版書刊和漫畫，更為公眾所熟悉。近年香港書展設有「電子書專區」或「電子書及電子學習資源館」，專供出版社及相關公司向讀者推廣產品及服務。電子書另一重要功能，是取代厚重的辭典和百科全書等參考書，更方便參考。總括來說，這將會是出版業另一拓展業務市場的機會。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頁或應用程式商店銷售。不過，出版商需要制定有效的工作流程，以發展電子出版業務；同時亦須為電子出版市場制定適當的業務模式。另一方面，傳統書籍加入立體書及擴增實境等特點，都能吸引讀者。

## 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、納米印刷法、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，例如為一些特別活動(如婚禮、生日派對、嬰兒出生、畢業等)而製作的家庭圖冊、紀念冊、個人成長片段圖冊、相簿等，可以小量和快速印刷。這將成為一門增長快及利潤高的業務。

3.40 印刷標準化技術 -- 劃一流程、步驟清晰，配合器材以快速、高效率、安全、符合成本效益的方式，生產優質產品，對印刷業十分重要，並已日漸普及。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。未來，採用印刷標準化技術將會是業內機構必備的品質證明。

3.41 環保印刷 -- 這是印刷業另一個重要技術趨勢，愈來愈普及和備受重視。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，成為印刷業的重要目標。由於出版商和其他用家承諾會更注重環保和符合綠色印刷標準，印刷公司須使用再造紙、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。

3.42 技術開發 -- 立體印刷及無線頻率識別(RFID)包裝技術，將成為印刷業重要的開發範疇，帶來新的商機。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，附加價值的印刷技術將更趨普及。印刷電子這項技術會日趨成熟；其獨特之處，是可印刷薄身柔韌的電子器件。因此，未來數年將會逐漸發展至製造低成本高效能的電子器件，如軟性顯示屏、智能標籤等。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，將成為另一項重要業務。

## (B) 出版業

3.43 電子書 -- 讀者的閱讀習慣開始轉變，電子書逐漸為讀者接受。年輕一代十分熱衷數碼書刊、漫畫、其他讀物等。數碼讀物內容變得更豐富，可以多媒體閱覽。電子書對作家及出版商同樣重要。網上學習相當受歡迎。過去幾年，電子出版業務增長迅速，未來仍會繼續增長。開發的電子產品愈來愈多，採用不同操作系統（Android、iOS、Symbian、Windows Mobile 等），配合電子出版業務。除了廣受歡迎的蘋果 i-Phones 和 i-Pads 外，市場上還有其他電子書閱讀器、平板電腦和流動通訊器材，將令電子出版市場更加蓬勃。可以預見，電子書將為出版業帶來利潤商機。

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。不過，數碼經濟社會下，網上侵權事件漸多，始終對作家和出版商構成威脅。政府將針對作者、出版商、服務供應商及代理角色和利益關係，加大力度處理版權、法例與權益等議題，例如數碼內容管理（DCM）及數碼版權管理（DRM），將可適當解決有關爭議。

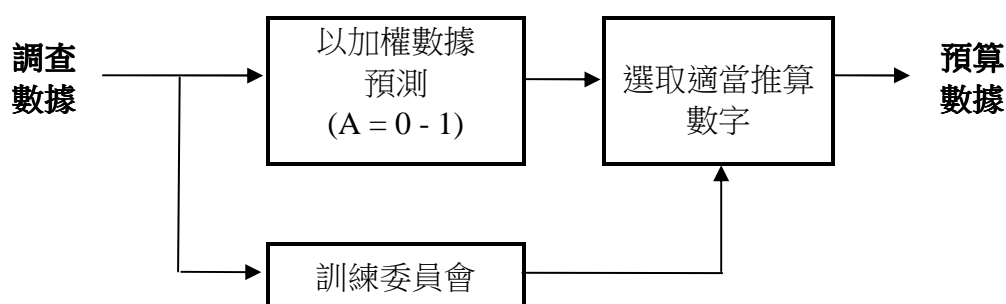
3.45 互聯網成為通用平台 -- 供傳送數碼內容和分享應用經驗。開發先進的雲端電腦技術，進一步加強未來電子出版的發展，包括多媒體互動，不同語言、格式兼容及視聽功能，更可發展至全媒體出版，將數碼內容以文字、圖像、相片、聲音、錄像和影片（包括立體影像）等媒體存取，然後透過互聯網及其他無線通訊網絡傳送。

### 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2013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 2013 年至 2015 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」，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、行業前景等等因素，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 本會審閱過印刷業過往及是次調查所得數據，包括2013年5月僱主的人力預測，並考慮到行業的未來發展，認為按3%流失率培訓人手，可應付業內三個技能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 根據上述估計，印刷業在未來三年（2013年至2015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（2013年至2015年）**

技能等級	平均每年需增加人手		
	2013年5月 預測 僱員總數	流失人數(3%)	(±10% 幅度)
技師／管理	1 246	38	34 - 42
技術員／督導	8 039	242	218 - 266
技工	7 954	240	216 - 264

上述數字按主要職務細分的情況見附錄 17。

## (B) 出版業

3.51 「調節過濾法」也用於預測出版業的人力需求。由於從業員相對年輕，本會預測未來三年人力需求時，將經理、主任及技術人員級的自然流失率亦定為3%。本會發現，2012年5月出版業的整體人力，較2010年5月每年增長3%。由於電子出版業務一直增長，該行業的人手，特別在經理級人員方面會有所增加。

3.52 根據上述估計，出版業未來三年（2013年至2015年）每年需額外增加人手見下表：

**表 3.14： 出版業每年人手需求（2013年至2015年）**

技能等級	平均每年需增加人手			
	預測增長 (A)	流失人數 (B)	總計 (A) + (B)	(±10% 幅度)
經理	68	50	118	106 - 130
主任	9	102	111	100 - 122
技術人員	29	150	179	161 - 197

上述數字按主要職務細分的情況見附錄 18。

## 人力供求分析

3.53 預測印刷業 2013 年至 2015 年每年需要 34 至 42 名技師，如連同附錄 18 所述，出版業同期需要 5 至 7 名製作總監 / 經理，則 2013 年至 2015 年業界每年總共需要 39 至 49 名技師 / 管理級人員。

3.54 技師級人手方面，由於本地專上院校並無開辦印刷學士課程，所以目前的人力供應不足。青年人如有志進修較高程度的印務課程，須往海外求學。由於技師供應有限，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的高級文憑畢業生，或大學畢業生。

3.55 香港知專設計學院的傳意設計及數碼媒體學系是本地唯一提供印務學科高級文憑課程的院校。預計 2013 年至 2015 年畢業人數如下：

課程	估計畢業人數		
	2012/13	2013/14	2014/15
<u>全日制</u>			
攝影及平面成像高級文憑	1	1	0
印刷及出版高級文憑（三年制）	70	60	2
印刷及出版高級文憑（兩年制）	0	58	58
總計:	71	119	60

3.56 未來三年，知專設計學院的畢業生人數較業界預算人力需求為少。不過，其他學科的高級文憑畢業生有些或會入行，擔任技術員級職務。

3.57 預測印刷業對技術員的需求將會增加，未來三年每年需要 218 至 266 人；如連同附錄 18 所述，出版業同期需要 3 至 5 名製作主任，則 2013 年至 2015 年業界每年總共需要 221 至 271 名技術員。



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，根據所提供的資料，技術員課程畢業生人數將如下：

課程	估計畢業生人數		
	2012/13	2013/14	2014/15
中專文憑（廣告、包裝及印刷）	1	0	0
中專文憑（廣告、包裝及印刷）－技術員基礎證書	6	0	0
中專教育文憑課程（廣告、包裝及印刷）－技術員基礎證書	5	0	0
中專教育文憑課程（廣告、包裝及印刷）－中專教育文憑	49	44	52
中專教育文憑課程（平面圖像傳播）－中專教育文憑	83	50	68
總計:	144	94	120

3.59 卓越培訓發展中心（印刷業）的畢業生總數，未足以應付 2013 年至 2015 年的預測需求。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。另外，由於印刷技術不斷進步，本會認為，如由受過適當訓練的專業院校技術員課程畢業生擔任技術員級工作，會更為勝任。

3.60 技工方面，雖然預測未來三年需求沒有增長，但仍需有固定的人力供應，以維持本地印刷業務。預測 2013 年至 2015 年每年需要 216 至 264 名印刷技工；如連同附錄 18 所述，出版業同期每年需要印刷技工（製作助理）10 至 12 人，則業界在 2013 年至 2015 年總共需要 226 至 276 名技工。

3.61 根據卓越培訓發展中心（印刷業）的訓練名額，技工畢業生人數如下：

課程	估計畢業人數		
	2012/13	2013/14	2014/15
中專教育文憑（廣告、包裝及印刷）－基本技術證書	9	26	45
中專教育文憑（平面圖像傳播）－基本技術證書	13	46	43
總計:	22	72	88

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預測需求。不過，業界可讓傳統職務工人修讀技能提升課程，以再培訓方式紓緩人手短缺的問題。

3.63 本會將在 2014 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 自上次人力調查（2010年5月）後，香港印刷及出版業經歷艱難時期。歐債危機、美國聯邦儲備局未來的決定和干預、內地通脹急升等，都會大大影響印刷及出版業的發展。人民幣幣值持續急升，工資、稅項和關稅上漲，能源及物料價格上揚等，亦將令營運成本繼續居高不下。珠三角地區勞工短缺亦是另一項挑戰。除了內地同行外，本港機構亦面對亞洲區內多個生產商接踵而來的業務挑戰，競爭劇烈。不過，另一方面，內地現已成為世界第二大印刷市場，2011年3月初，中國公布《十二五規劃》，不但力求促進內需，加速城市化，同時亦會以建設成印刷大國為目標。《十二五規劃》將為本港公司締造不少商機。香港擁有優越的電訊網絡，有助數碼印刷及電子出版蓬勃發展，業界如可善用此寶貴資產，定能受惠。

4.2 基於上述種種因素，本會對印刷及出版業未來幾年的前景持審慎樂觀的態度，相信印刷業的業務將可維穩，而出版業則可望錄得溫和增長。本會建議僱主考慮採取以下措施，應付當前的形勢和未來的挑戰：

- (i) 精簡和分散業務，以提升運作靈活度和效率，使業務更勝從前；
- (ii) 發展更具創意、高增值、富成本效益、優質及環保的產品／服務（特別是跨媒體領域方面），以提升競爭力；
- (iii) 提供適當的培訓，加強員工整體技術水平和能力，特別是資訊科技、設計及創意，使公司更具實力和競爭力；
- (iv) 在本身具優勢的產品市場內，以最具成本效益的方法繼續開拓新商機，擴大市場佔有率；
- (v) 維繫現有的重點客戶，加強伙伴合作，並尋求與潛在的新客戶建立伙伴關係。

4.3 至於員工技術及才幹方面，本會建議僱主在考慮公司的培訓需求以外，亦參考附錄 15 及附錄 16 所載印刷業和出版業的「僱員所需的訓練（各門類）」資料。在當前的特別情況下，僱主宜加強培訓力度，確保有足夠的幹練人才迎接未來的挑戰和掌握商機。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，適時為業界提供所需培訓服務。

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，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，提出建議配合業內訓練需要。

## 每年培訓人數

4.5 調查期間，印刷業僅有 6 名受訓者，出版業則無受訓者。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求。

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人力訓練計劃：

**表 4.1： 建議每年培訓人數**  
(2013年至2015年)

<b>技能等級</b>	建議每年培訓人數	
	印刷業	出版業
技師／管理／經理	38	118
技術員／督導／主任	242	111
技工／技術人員	240	179

印刷業及出版業各主要職務的詳細人力培訓數字載於附錄 17 和附錄 18。

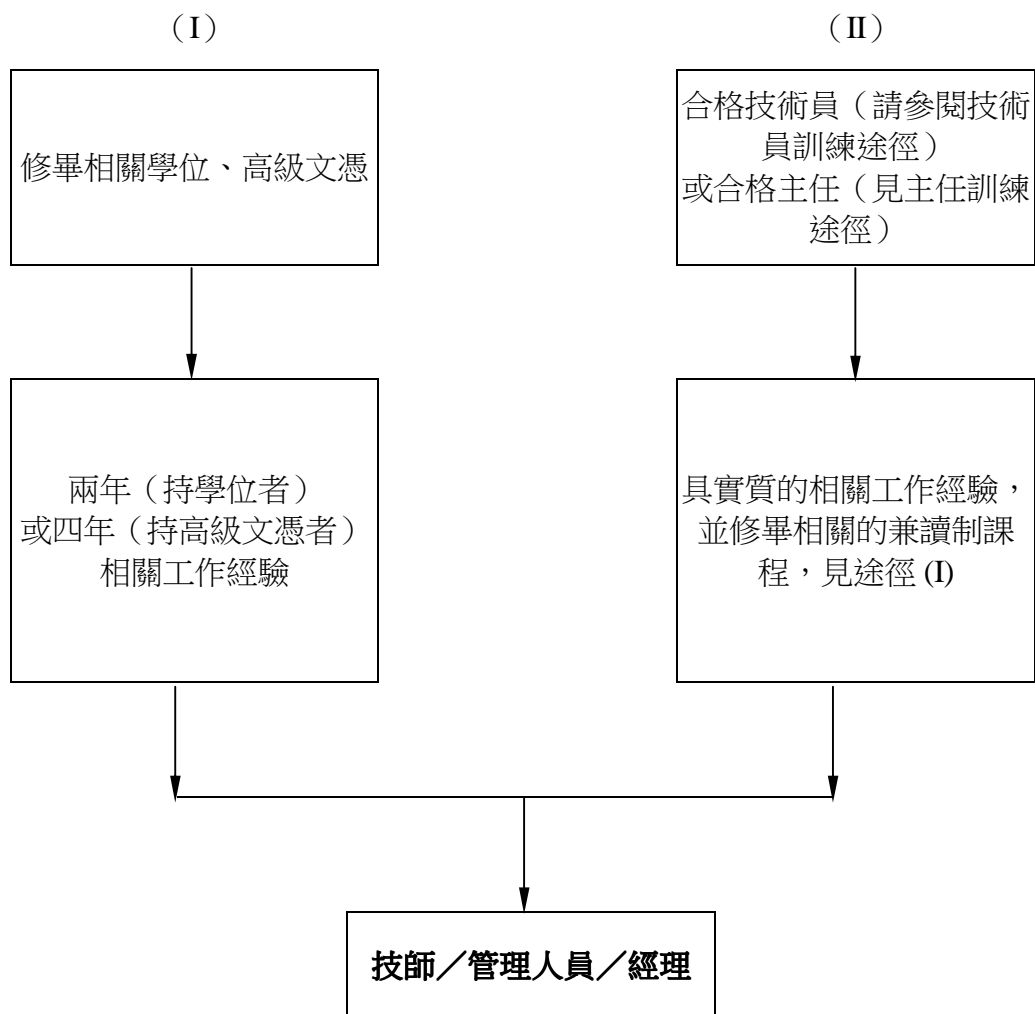
4.7 僱主進行機構人力策劃時，請參考第 4.6 段所載的人力培訓數字。2013 年至 2015 年間，印刷業每年所需培訓的技師／管理人員、技術員／督導及技工，約佔現時各級人力的 3.0%（流失率）；出版業每年所需培訓的經理、主任、技術人員，約佔現時各級人力的 7.2%、3.3 % 及 3.6%。

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列各段。

### 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／管理人員／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。

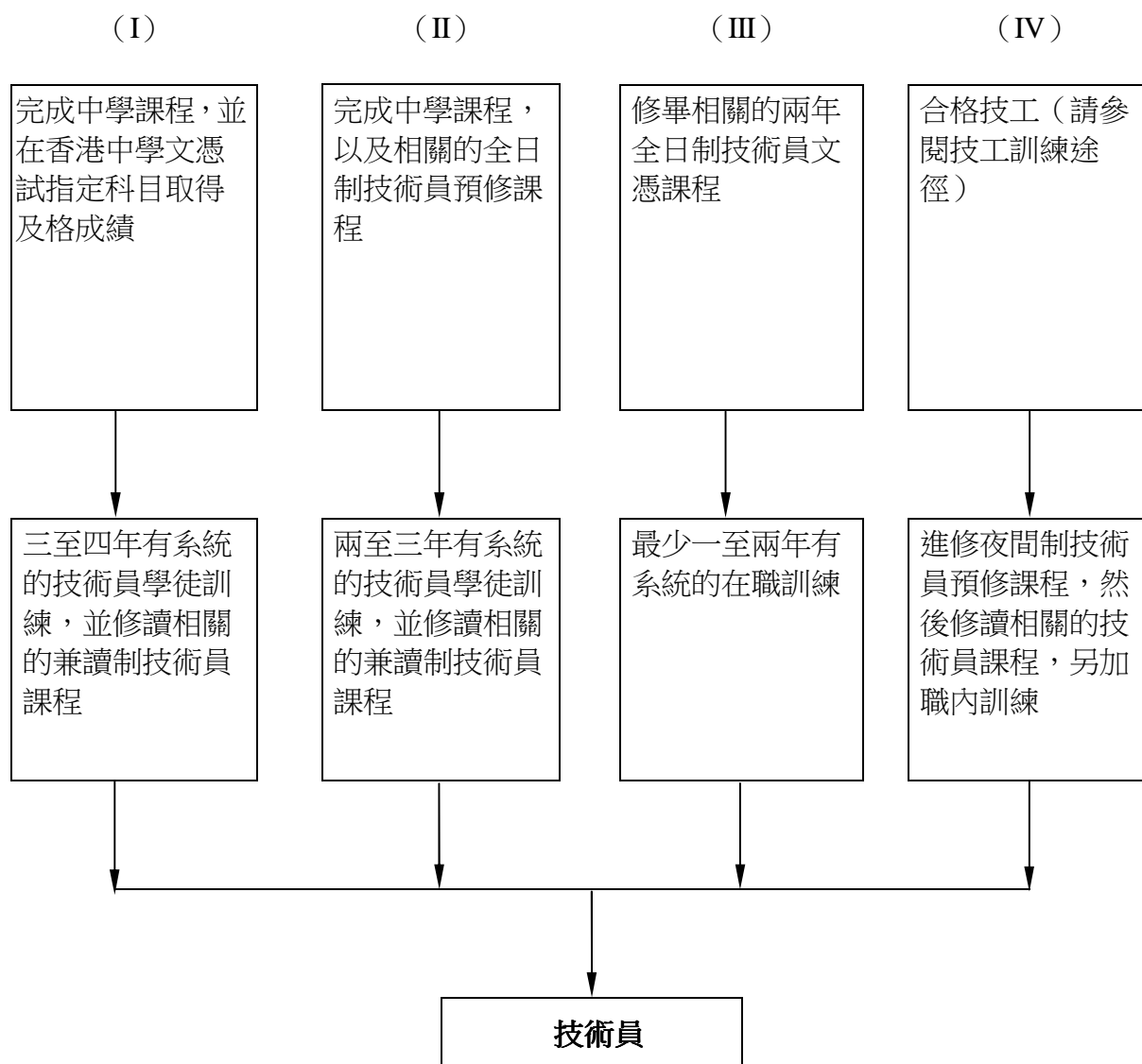
4.12 本會亦建議僱主資助屬下技術員／主任修讀夜間兼讀制學位、高級文憑或高級證書課程，以提升知識技能。

## 技術員／主任訓練

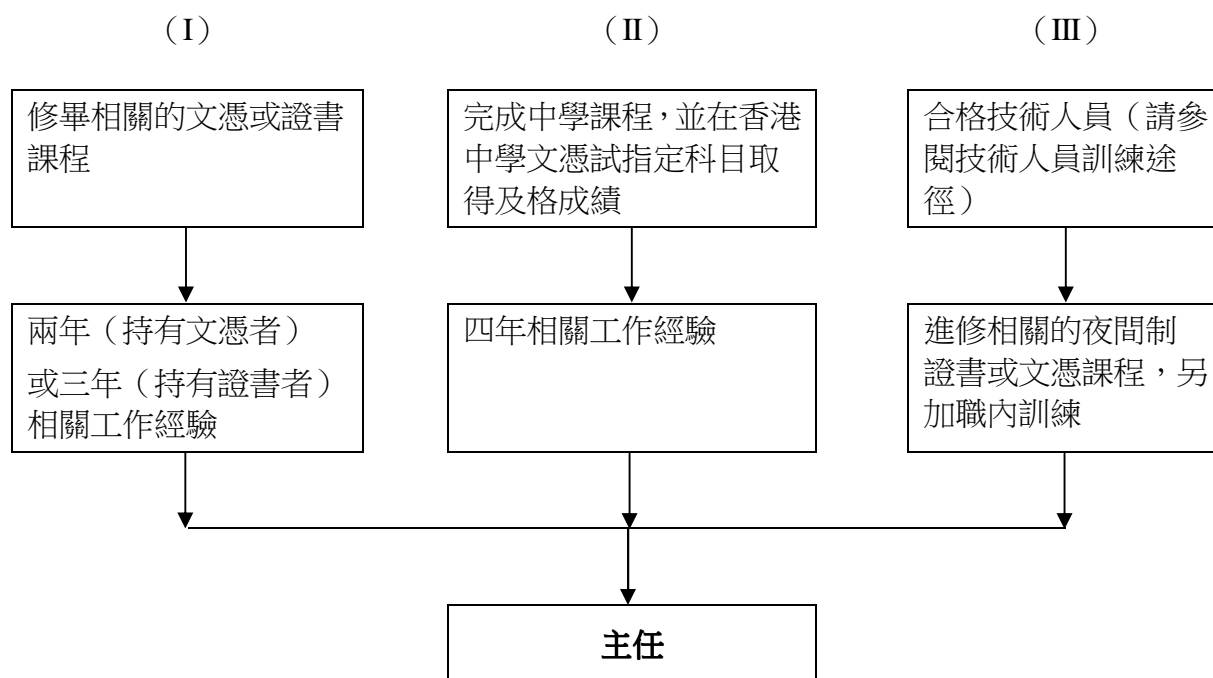
4.13 技術員或主任應能運用已確立的技術知識和程序，執行技術職務，包括督導技工或技術人員等。培訓內容應包括職內實務訓練和修讀相關的技術員證書課程，使他們能兼具實際經驗和理論知識。

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，辦有印刷學高級文憑課程（全日制和兼讀制）及其他增修課程；而轄下的卓越培訓發展中心（印刷業）亦提供一至三年全日制中專教育文憑課程，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受訓者，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，訓練他們成為技術員或主任；部分僱主會聘用相關文憑或證書課程畢業生。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）畢業生為技工或技術員學徒，一般訓練期為三年，全日制基本技術證書或技術員基礎證書課程畢業生可獲豁免首年學徒訓練。

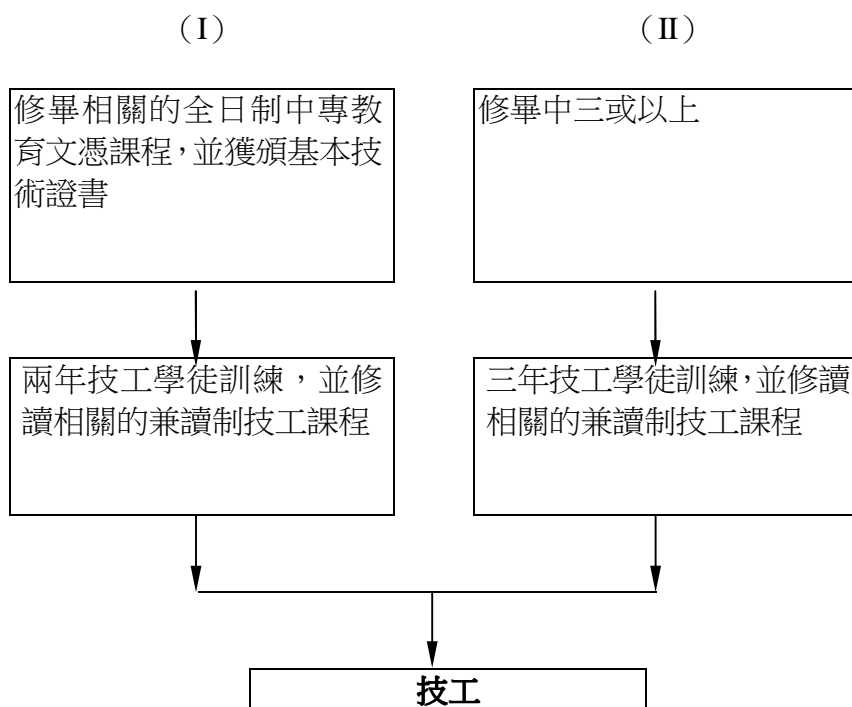
4.17 本會籲請印刷業及出版業僱主聘用卓越培訓發展中心（印刷業）或香港知專設計學院畢業生，並資助他們進修兼讀制課程，以增進知識技能。

## 技工／技術人員訓練

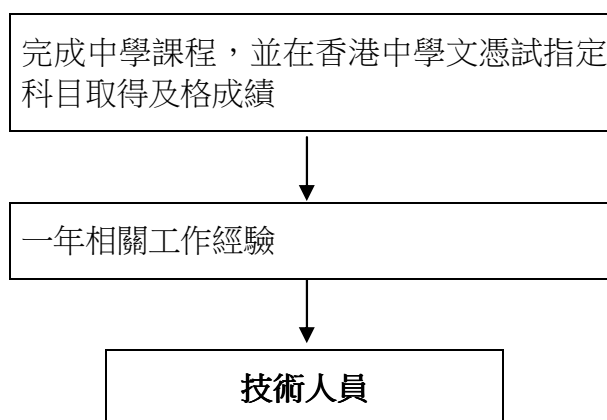
4.18 技工或技術人員，是指能運用技能以擔任多類相關職務技術支援工作的人員；除了實務技能，亦須具備相關理論知識，以適應科技演進。

4.19 建議訓練途徑如下：

### (A) 印刷業－技工



### (B) 出版業－技術人員





4.20 VTC 轄下的卓越培訓發展中心（印刷業）自 2009 年起停辦基本技術證書（BCC）課程；由 2009/10 學年起，中心推出全新的中專教育文憑（印刷媒體）課程，並納入先前的 BCC 課程內容。學員如完成 930 小時行業單元及 210 小時通用單元，即可獲 168 個學分，畢業生會獲頒基本技術證書。

### 印刷學基本技術證書課程

4.21 卓越培訓發展中心（印刷業）開辦的全日制中專教育文憑課程，可讓學生選擇 BCC 為結業學歷。這類課程包括實務訓練、行業知識及通識教育，幫助有意就業的青年人入行。

4.22 取得 BCC 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技能，入職後便可立即投入生產工作。

4.23 卓越培訓發展中心（印刷業）開辦的基本技術證書課程詳載於第 4.29 段。

### 新技能提升計劃

4.24 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。學員修讀這個計劃的課程，可獲資助七成學費。合適的培訓機構可競投開辦印刷業 SUS 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 SUS 課程。現時為業內技工開辦的技能提升課程詳載於附錄 19。

4.25 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

4.26 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，其目的為：

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

4.27 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。

4.28 本會籲請僱主鼓勵屬下技工僱員參加技能測驗，讓他們的從業地位得到正式承認。

### 卓越培訓發展中心（印刷業）

4.29 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（印刷媒體）（BCC 學歷）	最少一年
(b) 中專教育文憑（印刷媒體）（TFC 學歷）	一年至兩年
(c) 中專教育文憑（印刷媒體）（DVE 學歷）	一年至三年
(d) 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	三至 180 小時

註： BCC : 基本技術證書  
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

4.30 香港知專設計學院屬下設有傳意設計及數碼媒體學系，本會呼籲僱主全力支持該學系，積極僱用其全日制課程的畢業生。該學院所辦的相關課程詳載於附錄 20。

## 印刷科技研究中心

4.31 1999 年 9 月，香港印刷業商會與 VTC 轄下的香港專業教育學院（觀塘分校）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 年正式遷往香港知專設計學院。

4.32 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，中心已建成先進及支援多個供應商的數碼印刷製作環境，設備總值超過港幣 1,500 萬元，模擬業界環境。透過舉行科技轉移研討會、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，APTEC 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。

4.33 2003 年 1 月 31 日完成合作項目後，APTEC 亦揭開新一頁。為了繼續服務業界，APTEC 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 VTC 簽訂協議，建立新的合作關係。

4.34 近年，APTEC 與國際標準組織印刷技術委員會（ISO TC130）、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 年及 2013 年，在中小企業發展支援基金的資助下，APTEC 舉行了兩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

4.35 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

4.36 VTC 提供下列免費服務，協助僱主規劃員工訓練：

- (a) 法定**學徒訓練計劃**：有效培訓技術員和技工，以應付業內需要；
- (b) **工科畢業生訓練計劃**：協助工科生和工科畢業生完成工程師專業訓練；
- (c) 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
- (d) **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

4.37 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，並准許他們接受職外增修訓練。

## 外間課程／研討會

4.38 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技巧，協助他們適應經濟轉變及行業要求。本會相信這類培訓能達到預期果效，建議僱主善加利用，以提升僱員的專業水平。

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

Membership (as at 31<sup>st</sup> March 2013)  
委員名單（截至二〇一三年三月三十一日止）

Chairman  
主席

Mr YAN Tak-chung, Alex  
任德聰先生

Vice-chairman  
副主席

Ms CHEUNG Shin-yee  
張倩儀女士

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

Mr Eric KWOK  
郭磊華先生

Ms KWONG Kwan-lai  
鄭群麗女士

Mr LAI Chau-wah, Charles  
黎秋華先生

Ms LAM Sum-sum, Cynthia  
林心心女士

Mr LAU Man-pong, Peter  
劉文邦先生

Mr LO Kwok-ming, Herman  
盧國明先生

Mr LEUNG Siu-yin  
梁兆賢先生

Mr MAK Wai-kei  
麥偉基先生

Mr NG Wang-kuen, Thomas  
吳宏權先生

Dr Allen SHI lop-tak. MH, JP  
史立德太平紳士 MH

Mr SIT Sai-yu  
薛世儒先生

Mr SO Wah-sum, Conrad  
蘇華森先生

Mr TSANG Hip-tai  
曾協泰先生

Miss CHOW Cheuk-mui, Freda  
周卓梅小姐

Miss MAK Pui-lun, Fiona  
麥貝倫小姐

Mr MAU Kim-fai, Ben  
繆劍輝先生

Mr WONG Kei-yung  
黃基勇先生

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 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 the IVE and 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 elements.
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 organize 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 the 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)、訓練及發展中心提出建議。
5. 就 IVE、訓練及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。



Headquarters Division 2 總辦事處二科  
16F VTC Tower, 27 Wood Road, Wan Chai, Hong Kong 香港灣仔活道27號職業訓練局大樓16樓  
www.vtc.edu.hk

Telephone No 電話

Facsimile No 傳真 3748 9400 / 3748 9401

Our Reference 本局檔號 ( 3 ) in PP/4/2 (2012)

Your Reference 來函



10 May 2012

Dear Sir/Madam,

**The 2012 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 15 May 2012 to 14 June 2012.

The survey aims 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; and
- (iii) the number of existing vacancies.

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 2012 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

Telephone No 電話

Facsimile No 傳真

Our Reference 本局檔號 ( 3 ) in PP/4/2 (2012)

Your Reference 來函檔號 3748 9400 / 3748 9401



執事先生/女士:

### 印刷業二零一二年人力調查

職業訓練局屬下印刷及出版業訓練委員會將於二零一二年五月十五日至六月十四日期間進行印刷業人力調查，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；及
- (三) 現有空缺數目。

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

二零一二年五月十日

**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 2012 MANPOWER SURVEY OF THE PRINTING INDUSTRY**  
**印刷業二零一二年人力調查**

**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	0 9 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\*

- 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 tick in the appropriate box 請在適當空格內加上✓)

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

(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

POSITION:  
職位

TEL. NO.:  
電話

FAX NO.:  
圖文傳真

E-MAIL:  
電郵

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Part I 第一部分

(A) Job 工作		Rec. Type 記錄 類型	No. 職務 編號	(B) Monthly Income Code 每月收入 編號	(C) No. of Employees at Date of Survey (excl. trainees) 現有僱員人數 (受訓者除外)	(D) Forecast of No. Employed 12 Months from Now (excl. trainees) 預計 十二個月後 僱員人數 (受訓者除外)	(E) No. of Vacancies at Date of Survey (excl. trainees) 現有 空缺額 (受訓者除外)	(F) No. of Trainees at Date of Survey 現有 受訓者 人數
Title 職稱								
			8 - 10	11 - 12	13 - 16	17 - 20	21 - 23	24 - 26
1		2						
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						

Enter in column B employee's monthly income range according to the following codes:  
將僱員的每月總收入幅度按下列編號填入B欄內：

Code 編號	Monthly Income Range 每月收入幅度
1	\$6,500 or below \$6,500 或以下
2	\$6,501 - \$8,000
3	\$8,001 - \$10,000
4	\$10,001 - \$15,000
5	\$15,001 - \$20,000
6	\$20,001 - \$30,000
7	\$30,001 - \$45,000
8	\$45,001 - \$60,000
9	\$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。

<p><b>Q.1 Employer's View on the Expected Change in Business Situation for the Coming Year</b> 僱主對來年業務狀況預期變動的意見</p> <p>Better 較佳 <input type="text" value="8"/> 8 Same 不變 <input type="text" value="9"/> 9 Worse 較差 <input type="text" value="10"/> 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="text" value="11"/> 11</p>	<p><b>Q.2 Number of Printing Employees Promoted in the Industry</b> 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: 過去十二個月內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="text" value="12"/> 12 Technicians / Supervisors 技術員/督導人員 <input type="text" value="14"/> 14 Craftsmen 技工 <input type="text" value="16"/> 16</p> <p>For Official Use Only (此欄毋須填寫)</p> <p><input type="text" value="18"/> 18</p>																																											
<p><b>Q.3 Number of Technical Staff Deployed to Work Outside Hong Kong</b> 任職香港以外地方的技術員工人數</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 prior to the survey 請填寫調查前十二個月內，調派往香港以外地方工作超過六個月的技術員工人數</p> <p>Technologists / Managers 技師/管理人員 <input type="text" value="19"/> 19 Technicians / Supervisors 技術員/督導人員 <input type="text" value="21"/> 21 Craftsmen 技工 <input type="text" value="23"/> 23</p>	<p>For Official Use Only (此欄毋須填寫)</p> <p><input type="text" value="25"/> 25</p>	<p><b>Q.4 Whether with Production Workshop in the mainland of China?</b> 是否在中國內地設有廠房?</p> <p>(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="text" value="29"/> 29 Technicians / Supervisors 技術員/督導人員 <input type="text" value="33"/> 33 Craftsmen 技工 <input type="text" value="37"/> 37</p> <p>Yes 是 <input type="text" value="26"/> 26 No 否 <input type="text" value="27"/> 27</p> <p>For Official Use Only (此欄毋須填寫)</p> <p><input type="text" value="41"/> 41</p>																																											
<p><b>Q.5 Education and Training an Employee Should Have</b> 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>Technician/Supervisory Level 技術員/督導級</p>	<p>Craftsman Level 技工級</p>	<table border="1"> <thead> <tr> <th>Code 編號</th> <th>Education 教育</th> <th>Code 編號</th> <th>Training Mode 訓練方式</th> <th>Code 編號</th> <th>Training Period 訓練時間</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>University Degree or above 大學學位或以上</td> <td>1</td> <td>On the job training 在職訓練</td> <td>1</td> <td>4 years or above 四年或以上</td> </tr> <tr> <td>2</td> <td>Higher Diploma/Associate Degree 高級文憑/副學士</td> <td>2</td> <td>Apprenticeship 學徒訓練</td> <td>2</td> <td>3 to less than 4 years 三年至四年以下</td> </tr> <tr> <td>3</td> <td>Diploma/Higher Certificate 文憑/高級證書</td> <td>3</td> <td>Others 其他</td> <td>3</td> <td>2 to less than 3 years 兩年三年以下</td> </tr> <tr> <td>4</td> <td>Certificate/Secondary 5 to 7 證書/中五至中七</td> <td>4</td> <td></td> <td>4</td> <td>1 to less than 2 years 一年至兩年以下</td> </tr> <tr> <td>5</td> <td>Craft Certificate/Below Secondary 5 技工證書/中五以下</td> <td>5</td> <td></td> <td>5</td> <td>6 - less than 12 months 六至十二個月以下</td> </tr> <tr> <td></td> <td></td> <td>6</td> <td></td> <td>6</td> <td>Below 6 months 六個月以下</td> </tr> </tbody> </table>	Code 編號	Education 教育	Code 編號	Training Mode 訓練方式	Code 編號	Training Period 訓練時間	1	University Degree or above 大學學位或以上	1	On the job training 在職訓練	1	4 years or above 四年或以上	2	Higher Diploma/Associate Degree 高級文憑/副學士	2	Apprenticeship 學徒訓練	2	3 to less than 4 years 三年至四年以下	3	Diploma/Higher Certificate 文憑/高級證書	3	Others 其他	3	2 to less than 3 years 兩年三年以下	4	Certificate/Secondary 5 to 7 證書/中五至中七	4		4	1 to less than 2 years 一年至兩年以下	5	Craft Certificate/Below Secondary 5 技工證書/中五以下	5		5	6 - less than 12 months 六至十二個月以下			6		6	Below 6 months 六個月以下
Code 編號	Education 教育	Code 編號	Training Mode 訓練方式	Code 編號	Training Period 訓練時間																																								
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4	Certificate/Secondary 5 to 7 證書/中五至中七	4		4	1 to less than 2 years 一年至兩年以下																																								
5	Craft Certificate/Below Secondary 5 技工證書/中五以下	5		5	6 - less than 12 months 六至十二個月以下																																								
		6		6	Below 6 months 六個月以下																																								

**Employees Left**

僱員離職

Q.6 Please fill in the number of employees who had left your establishment in the past 12 months.

請填寫過去十二個月內，離職的僱員人數。

Technologist/Managerial Level  
技師／管理級

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51

Technician/Supervisory Level  
技術員／督導級

--	--	--	--

54

Craftsman Level  
技工級

--	--	--	--

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**Recruitment**

招聘

Q.7 Please fill in the number of new recruits in the past 12 months.

請填寫過去十二個月內，新招聘的僱員人數。

(a) Total number of recruits  
總招聘人數

Technologist  
Managerial Level  
技師／管理級

--	--	--	--

61

Technician/  
Supervisory Level  
技術員／督導級

--	--	--	--

64

Craftsman  
Level  
技工級

--	--	--	--

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(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

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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?

過去十二個月，貴機構招聘印刷業僱員時，有沒有遇到困難？

(Please tick as appropriate)

(請在適當的格內填上✓號)

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)

83 沒有招聘需要 (請跳答第十題)

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.

(You may tick up to three options.)

請說明貴機構在過去十二個月所遇到的主要招聘困難。(可選最多三項。)

(Please tick as appropriate)

(請在適當的格內填上✓號)

	<u>Technologist/ Managerial Level</u> 技師／管理級	<u>Technician/ Supervisory Level</u> 技術員／督導級	<u>Craftsman Level</u> 技工級
(a) Candidates lacked the relevant skills/expertise 應徵者並無相關技能／知識	<input type="checkbox"/> 84	<input type="checkbox"/> 85	<input type="checkbox"/> 86
(b) Candidates lacked the relevant experience 應徵者缺乏相關經驗	<input type="checkbox"/> 87	<input type="checkbox"/> 88	<input type="checkbox"/> 89
(c) Candidates lacked the relevant academic qualification 應徵者未具相關學歷	<input type="checkbox"/> 90	<input type="checkbox"/> 91	<input type="checkbox"/> 92
(d) Candidates' language skills (including Putonghua) were poor 應徵者語文能力(包括普通話)水平欠佳	<input type="checkbox"/> 93	<input type="checkbox"/> 94	<input type="checkbox"/> 95
(e) Candidates found the remuneration package not attractive 應徵者認為薪酬欠吸引	<input type="checkbox"/> 96	<input type="checkbox"/> 97	<input type="checkbox"/> 98
(f) Candidates were unwilling to work on shift for long hours 應徵者不願意長時間輪班工作	<input type="checkbox"/> 99	<input type="checkbox"/> 100	<input type="checkbox"/> 101
(g) Candidates were unwilling to work in the mainland of China 應徵者不願意到中國內地工作	<input type="checkbox"/> 102	<input type="checkbox"/> 103	<input type="checkbox"/> 104
(h) <u>Others</u> (Please Specify) 其他 (請註明)	<input type="checkbox"/> 105	<input type="checkbox"/> 106	<input type="checkbox"/> 107

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111

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 and China's 12th Five-Year Plan)?

為迎合各方面的轉變（包括香港轉型至知識型經濟及中國的《十二五規劃》），在未來十二個月，貴機構需要培訓機構提供哪方面的培訓？

Training Need  
(represented by 0-5 rating scale)  
(0 =no need, 5=greatest need)  
訓練需要  
(以0-5表示)  
(0=沒有需要, 5=十分需要)

<u>Code</u> 編號	<u>Type of Skills and/or Knowledge</u> 技能／知識的類別	<u>Technologist/ Managerial Level</u> 技師／管理級	<u>Technician/ Supervisory Level</u> 技術員／督導級	<u>Craftsman Level</u> 技工級
<b><u>Management Skills</u></b> <b>管理技能</b>				
101	Production management 製作管理	<input type="text"/> 112	<input type="text"/> 113	<input type="text"/> 114
102	Quality management 品質管理	<input type="text"/> 115	<input type="text"/> 116	<input type="text"/> 117
103	Marketing management 經銷管理	<input type="text"/> 118	<input type="text"/> 119	<input type="text"/> 120
104	Customer services 客戶服務	<input type="text"/> 121	<input type="text"/> 122	<input type="text"/> 123
105	Others (Please Specify) _____ 其他（請註明）	<input type="text"/> 124	<input type="text"/> 125	<input type="text"/> 126
<b><u>China-related Knowledge</u></b> <b>有關中國的知識</b>				
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	<input type="text"/> 127	<input type="text"/> 128	<input type="text"/> 129
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	<input type="text"/> 130	<input type="text"/> 131	<input type="text"/> 132
203	Trade and industry environment in the mainland of China 在中國內地的行業及營商常規	<input type="text"/> 133	<input type="text"/> 134	<input type="text"/> 135
204	Others (Please Specify) _____ 其他（請註明）	<input type="text"/> 136	<input type="text"/> 137	<input type="text"/> 138
<b><u>IT Skills</u></b> <b>資訊科技的技能</b>				
301	Computer graphics and webpage design 電腦圖像處理與網頁設計	<input type="text"/> 139	<input type="text"/> 140	<input type="text"/> 141
302	E-commerce knowledge and applications 電子商貿的知識及應用	<input type="text"/> 142	<input type="text"/> 143	<input type="text"/> 144
303	Media technology 媒體科技	<input type="text"/> 145	<input type="text"/> 146	<input type="text"/> 147
304	Others (Please Specify) _____ 其他（請註明）	<input type="text"/> 148	<input type="text"/> 149	<input type="text"/> 150

Training Need  
 (represented by 0-5 rating scale)  
 (0 =no need, 5=greatest need)  
 訓練需要  
 (以0-5表示)  
 (0=沒有需要, 5=十分需要)

<u>Code</u> 編號	<u>Type of Skills and/or Knowledge</u> 技能／知識的類別	<u>Technologist/ Managerial Level</u> 技師／管理級	<u>Technician/ Supervisory Level</u> 技術員／督導級	<u>Craftsman Level</u> 技工級
<b><u>Language Skills</u></b> <b>語文技能</b>				
401	Spoken English 英語會話	<input type="text"/> 151	<input type="text"/> 152	<input type="text"/> 153
402	Putonghua 普通話	<input type="text"/> 154	<input type="text"/> 155	<input type="text"/> 156
403	Others (Please Specify) _____ 其他（請註明）	<input type="text"/> 157	<input type="text"/> 158	<input type="text"/> 159
<b><u>Industry Specific Skills</u></b> <b>業內專業技能</b>				
501	Pre-press technique 印前技術	<input type="text"/> 160	<input type="text"/> 161	<input type="text"/> 162
502	Printing technique 印刷技術	<input type="text"/> 163	<input type="text"/> 164	<input type="text"/> 165
503	Post-printing technique 印後技術	<input type="text"/> 166	<input type="text"/> 167	<input type="text"/> 168
504	Production coordination and project management 生產協調及項目管理	<input type="text"/> 169	<input type="text"/> 170	<input type="text"/> 171
505	Estimation and costing 估價及成本	<input type="text"/> 172	<input type="text"/> 173	<input type="text"/> 174
506	Repair and maintenance 機械維修及保養	<input type="text"/> 175	<input type="text"/> 176	<input type="text"/> 177
507	Colour management 色彩管理	<input type="text"/> 178	<input type="text"/> 179	<input type="text"/> 180
508	Products Structure 產品結構	<input type="text"/> 181	<input type="text"/> 182	<input type="text"/> 183
509	Materials application 物料應用	<input type="text"/> 184	<input type="text"/> 185	<input type="text"/> 186
510	Quality Assurance 品質保證	<input type="text"/> 187	<input type="text"/> 188	<input type="text"/> 189
511	Others (Please Specify) _____ 其他（請註明）	<input type="text"/> 190	<input type="text"/> 191	<input type="text"/> 192
<b><u>For official use only</u></b> <b>此欄毋須填寫</b>		<input type="text"/> 193	<input type="text"/> 194	<input type="text"/> 195

End of Questionnaire  
問卷完

**THE 2012 MANPOWER SURVEY OF THE PRINTING INDUSTRY**

印刷業二零一二年人力調查

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 Employees at Date of Survey (Excluding Trainees) - Column 'C'

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 Employed 12 Months from Now (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 at Date of Survey (Excluding Trainees) - Column 'E'

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 at Date of Survey - Column 'F'

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。

11. Example

例子

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

為協助閣下填表，現將例子附錄於後，以供參考。

**Part II**

**第二部分**

12. 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。

13. 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 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晉升的印刷業各技能等級僱員人數（各職稱可參見附錄丙）。

14. 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 during the 12 months prior to the survey.

請填寫過去十二個月內，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。

15. 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。

16. 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。）

17. Q.6  
Employees Left  
僱員離職

Please enter the number of employees who had left your establishment in the past 12 months.

請填寫過去十二個月內，貴機構離職的僱員人數。

18. Q.7  
Recruitment  
招聘

- (a) Please enter the number of new recruits in the past 12 months; and  
請填寫過去十二個月內，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。

19. 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. 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。

20. 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. (by ticking up to 3 options).  
請說明貴機構在過去十二個月所遇到的主要招聘困難。(最多可選三項)

21. 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 (represented by a 0-5 rating scale where 0 represents no training need and 5 represents the greatest training need) in the next 12 months in response to the various changes (including Hong Kong's transforming into a knowledge-based economy and China's 12<sup>th</sup> Five-Year Plan).  
為迎合各方面的轉變(包括香港轉型至知識型經濟及中國的《十二五規劃》)，請填寫在未來十二個月，貴機構所需要由培訓機構提供的培訓類別(以0-5表示，0代表沒有需要，5代表十分需要)。



Example  
例子

(A) Job 工作	Title 職稱	Rec. Type 記錄 類型	No. 職務 編號	(B) Monthly Income Code 每月收入 編號	(C) No. of Employees at Date of Survey (excl. trainees) 現有僱員人數 (受訓者除外)	(D) Forecast of No. Employed 12 Months from Now (excl. trainees) 預計 十二個月後 僱員人數 (受訓者除外)	(E) No. of Vacancies at Date of Survey (excl. trainees) 現有 空缺額 (受訓者除外)	(F) No. of Trainees at Date of Survey 現有 受訓者 人數	Enter in column B employee's monthly income range according to the following codes: 將僱員的每月總收入幅度 按下列編號填入B欄內：
			8 - 10	11-12	13 - 16	17 - 20	21 - 23	24 - 26	
1	Digital Printing System Craftsman 數碼印刷系統操作技工	2	3 0 3	2	5	7	1	1	1 \$6,500 or below \$6,500 或以下
2		2							2 \$6,501 - \$8,000
3		2							3 \$8,001 - \$10,000
4		2							4 \$10,001 - \$15,000
5		2							5 \$15,001 - \$20,000
6		2							6 \$20,001 - \$30,000
7		2							7 \$30,001 - \$45,000
8		2							8 \$45,001 - \$60,000
									9 \$60,001 or above \$60,001 或以上

**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
<b>TECHNOLOGIST / MANAGERIAL LEVEL      技師／管理級</b>		
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
<b>TECHNICIAN/SUPERVISORY LEVEL      技術員／督導級</b>		
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
<b>TECHNICIAN/SUPERVISORY LEVEL (Continued) 技術員/督導級 (續)</b>		
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。
<b>CRAFTSMAN LEVEL 技工級</b>		
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
<b>CRAFTSMAN LEVEL (Continued)      技工級 (續)</b>		
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。
<b>UNSKILLED LEVEL      非技術人員級</b>		
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。

Telephone No 電話

Facsimile No 傳真 3748 9400 / 3748 9401

Our Reference 本局檔號 ( 3 ) in PP/4/2 (2012)

Your Reference 來函檔號



10 May 2012

Dear Sir/Madam,

**The 2012 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 15 May 2012 to 14 June 2012.

The survey aims 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; and
- (iii) the number of existing vacancies.

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 2012 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



執事先生/女士:

### 出版業二零一二年人力調查

職業訓練局屬下印刷及出版業訓練委員會將於二零一二年五月十五日  
至六月十四日期間進行出版業人力調查，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；及
- (三) 現有空缺數目。

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;該等資料對制定出版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

二零一二年五月十日

**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 2012 MANPOWER SURVEY OF THE PUBLISHING INDUSTRY**  
出版業二零一二年人力調查

**QUESTIONNAIRE**  
調查表

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

<b>For Official Use Only:</b> 此欄毋須填寫	<b>Rec. Type</b>	<b>Survey Code</b>	<b>Industry Code</b>	<b>Establishment No.</b>	<b>Enumerator's No.</b>	<b>Editor's No.</b>	<b>Check Digit</b>	<b>No. of Employees Covered by the Questionnaire</b>
	1	3 2 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

<b>TYPE OF PRODUCTS/SERVICE*:</b> 產品種類 / 服務性質* <small>* can choose more than one option 可選擇多於一項</small>	<b>Books Publishing</b> 書籍出版社 <input type="checkbox"/> General 28 一般圖書 <input type="checkbox"/> Academic 29 學術書籍 <input type="checkbox"/> Textbook/Reference Book 30 教科書 / 參考書	<b>Magazine Publishing</b> 雜誌出版社 <input type="checkbox"/> Magazine 31 雜誌 <input type="checkbox"/> Academic Journal 32 學術期刊	<input type="checkbox"/> Newspaper Publishing 33 報紙出版 <input type="checkbox"/> Others 34 其他 Please specify 請註明 _____
<b>Is your company involved in electronic publishing? 貴公司有否從事電子出版?</b> <input type="checkbox"/> Yes ** 35 <input type="checkbox"/> No 36 <small>**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</small>	<input type="checkbox"/> Online Publishing 37 網上出版	<input type="checkbox"/> CD-ROM 38 資料光碟	<b>Number of e-publishing staff:</b> 從事電子出版員工人數: _____ 39

(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

**TEL. NO.:** \_\_\_\_\_  
電話

**E-MAIL:** \_\_\_\_\_  
電郵

Part I 第一部分

(A) Job 工作			(B) Monthly Income Code 每月收入 編號	(C) No. of Employees at Date of Survey (excl. trainees) 現有僱員人數 (受訓者除外)	(D) Forecast of No. Employed 12 Months from Now (excl. trainees) 預計 十二個月後 僱員人數 (受訓者除外)	(E) No. of Vacancies at Date of Survey (excl. trainees) 現有 空缺額 (受訓者除外)	(F) No. of Trainees at Date of Survey 現有 受訓者 人數
Title 職稱	Rec. Type 記錄 類型	No. 職務 編號					
		8 - 10	11 - 12	13 - 16	17 - 20	21 - 23	24 - 26
1	2						
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						

Enter in column B employee's monthly income range according to the following codes:  
將僱員的每月總收入幅度按下列編號填入B欄內：

Code 編號	Monthly Income Range 每月收入幅度
1	\$6,500 or below \$6,500 或以下
2	\$6,501 - \$8,000
3	\$8,001 - \$10,000
4	\$10,001 - \$15,000
5	\$15,001 - \$20,000
6	\$20,001 - \$30,000
7	\$30,001 - \$45,000
8	\$45,001 - \$60,000
9	\$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。

<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="text"/> 8</p> <p>Same 不變 <input type="text"/> 9</p> <p>Worse 較差 <input type="text"/> 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="text"/> 11</p>	<p>Q.2 Number of Publishing Employees Promoted in the Industry 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: 過去十二個月內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="text"/> 12</p> <p>Supervisors 主任 <input type="text"/> 14</p> <p>Technical Staff 技術人員 <input type="text"/> 16</p> <p>For Official Use Only (此欄毋須填寫)</p> <p><input type="text"/> 18</p>																																											
<p>Q.3 Number of Staff Deployed to Work in the mainland of China 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 prior to the survey 請填寫調查前十二個月內，調派往內地工作超過六個月的員工人數</p> <p>Design &amp; Production 設計及製作 <input type="text"/> 19 <input type="text"/> 21 <input type="text"/> 23</p> <p>Sales 營銷 <input type="text"/> 25 <input type="text"/> 27 <input type="text"/> 29</p> <p>Editing 編輯 <input type="text"/> 31 <input type="text"/> 33 <input type="text"/> 35</p> <p>Managers 經理</p> <p>Supervisors 主任</p> <p>Technical Staff 技術人員</p>	<p>For Official Use Only (此欄毋須填寫)</p> <p><input type="text"/> 37</p> <p><input type="text"/> 38</p> <p><input type="text"/> 39</p>	<p>Q.4 Whether with Company in the mainland of China? 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>Yes 是 <input type="text"/> 40</p> <p>No 否 <input type="text"/> 41</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="text"/> 43</p> <p>Supervisors 主任 <input type="text"/> 45</p> <p>Technical Staff 技術人員 <input type="text"/> 47</p> <p>For Official Use Only (此欄毋須填寫)</p> <p><input type="text"/> 42</p> <p><input type="text"/> 49</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>			<table border="1"> <thead> <tr> <th>Code 編號</th> <th>Education 教育</th> <th>Code 編號</th> <th>Training Mode 訓練方式</th> <th>Code 編號</th> <th>Training Period 訓練時間</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>University Degree or above 大學學位或以上</td> <td>1</td> <td>On the job training 在職訓練</td> <td>1</td> <td>4 years or above 四年或以上</td> </tr> <tr> <td>2</td> <td>Higher Diploma/Associate Degree 高級文憑/副學士</td> <td>2</td> <td>Apprenticeship 學徒訓練</td> <td>2</td> <td>3 to less than 4 years 三年至四年以下</td> </tr> <tr> <td>3</td> <td>Diploma/Higher Certificate 文憑/高級證書</td> <td>3</td> <td>Others 其他</td> <td>3</td> <td>2 to less than 3 years 兩年至三年以下</td> </tr> <tr> <td>4</td> <td>Certificate/Secondary 5 to 7 證書/中五至中七</td> <td>4</td> <td></td> <td>4</td> <td>1 to less than 2 years 一年至兩年以下</td> </tr> <tr> <td>5</td> <td>Craft Certificate/Below Secondary 5 技工證書/中五以下</td> <td>5</td> <td></td> <td>5</td> <td>6 - less than 12 months 六至十二個月以下</td> </tr> <tr> <td></td> <td></td> <td>6</td> <td></td> <td>6</td> <td>Below 6 months 六個月以下</td> </tr> </tbody> </table>	Code 編號	Education 教育	Code 編號	Training Mode 訓練方式	Code 編號	Training Period 訓練時間	1	University Degree or above 大學學位或以上	1	On the job training 在職訓練	1	4 years or above 四年或以上	2	Higher Diploma/Associate Degree 高級文憑/副學士	2	Apprenticeship 學徒訓練	2	3 to less than 4 years 三年至四年以下	3	Diploma/Higher Certificate 文憑/高級證書	3	Others 其他	3	2 to less than 3 years 兩年至三年以下	4	Certificate/Secondary 5 to 7 證書/中五至中七	4		4	1 to less than 2 years 一年至兩年以下	5	Craft Certificate/Below Secondary 5 技工證書/中五以下	5		5	6 - less than 12 months 六至十二個月以下			6		6	Below 6 months 六個月以下
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		6		6	Below 6 months 六個月以下																																								
<p>Managerial Level 經理級</p> <p>Education 教育 <input type="text"/> 50</p> <p>Training Mode 訓練方式 <input type="text"/> 51</p> <p>Training Period 訓練時間 <input type="text"/> 52</p>	<p>Supervisory Level 主任級</p> <p>Education 教育 <input type="text"/> 53</p> <p>Training Mode 訓練方式 <input type="text"/> 54</p> <p>Training Period 訓練時間 <input type="text"/> 55</p>	<p>Technical Staff Level 技術人員級</p> <p>Education 教育 <input type="text"/> 56</p> <p>Training Mode 訓練方式 <input type="text"/> 57</p> <p>Training Period 訓練時間 <input type="text"/> 58</p>																																											

Employees Left

僱員離職

Q.6 Please fill in the number of employees who had left your establishment in the past 12 months.

請填寫過去十二個月內，離職的僱員人數。

Managerial Level  
經理級

59

Supervisory Level  
主任級

62

Technical Staff Level  
技術人員級

65

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此欄毋須填寫

68

Recruitment

招聘

Q.7 Please fill in the number of new recruits in the past 12 months.

請填寫過去十二個月內，新招聘的僱員人數。

Managerial Level  
經理級

Supervisory Level  
主任級

Technical Staff Level  
技術人員級

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此欄毋須填寫

(a) Total number of recruits  
總招聘人數

69

72

75

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

79

82

85

88

**Q.8 Difficulties Encountered in Recruitment**

招聘困難

Did your establishment encounter any difficulties in recruitment in the past 12 months?

過去十二個月，貴機構招聘出版業僱員時，有沒有遇到困難？

(Please tick as appropriate)

(請在適當的格內填上✓號)

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)

**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.

(You may tick up to three options.)

請說明貴機構在過去十二個月所遇到的主要招聘困難。(可選最多三項。)

(Please tick as appropriate)

(請在適當的格內填上✓號)

	<u>Managerial Level</u> 經理級	<u>Supervisory Level</u> 主任級	<u>Technical Staff Level</u> 技術人員級
(a) Candidates lacked the relevant skills/expertise 應徵者並無相關技能／知識	<input type="checkbox"/> 92	<input type="checkbox"/> 93	<input type="checkbox"/> 94
(b) Candidates lacked the relevant experience 應徵者缺乏相關經驗	<input type="checkbox"/> 95	<input type="checkbox"/> 96	<input type="checkbox"/> 97
(c) Candidates lacked the relevant academic qualification 應徵者未具相關學歷	<input type="checkbox"/> 98	<input type="checkbox"/> 99	<input type="checkbox"/> 100
(d) Candidates' language skills (including Putonghua) were poor 應徵者語文能力(包括普通話)水平欠佳	<input type="checkbox"/> 101	<input type="checkbox"/> 102	<input type="checkbox"/> 103
(e) Candidates found the remuneration package not attractive 應徵者認為薪酬欠吸引	<input type="checkbox"/> 104	<input type="checkbox"/> 105	<input type="checkbox"/> 106
(f) Candidates were unwilling to work on shift for long hours 應徵者不願意長時間輪班工作	<input type="checkbox"/> 107	<input type="checkbox"/> 108	<input type="checkbox"/> 109
(g) Candidates were unwilling to work in the mainland of China 應徵者不願意到中國內地工作	<input type="checkbox"/> 110	<input type="checkbox"/> 111	<input type="checkbox"/> 112
(h) <u>Others</u> (Please Specify) _____ 其他(請註明)	<input type="checkbox"/> 113	<input type="checkbox"/> 114	<input type="checkbox"/> 115

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116

117

118

119

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 and China's 12th Five-Year Plan)?

為迎合各方面的轉變（包括香港轉型至知識型經濟及中國的《十二五規劃》），在未來十二個月，貴機構需要培訓機構提供哪方面的培訓？

Training Need  
(represented by 0-5 rating scale)  
(0 =no need, 5=greatest need)  
訓練需要  
(以0-5表示)  
(0=沒有需要, 5=十分需要)

<u>Code</u> 編號	<u>Type of Skills and/or Knowledge</u> 技能／知識的類別	<u>Managerial Level</u> 經理級	<u>Supervisory Level</u> 主任級	<u>Technical Staff Level</u> 操作人員級
<b><u>Management Skills</u></b> <b>管理技能</b>				
101	Production management 製作管理	<input type="text" value="120"/>	<input type="text" value="121"/>	<input type="text" value="122"/>
102	Quality management 品質管理	<input type="text" value="123"/>	<input type="text" value="124"/>	<input type="text" value="125"/>
103	Marketing management 經銷管理	<input type="text" value="126"/>	<input type="text" value="127"/>	<input type="text" value="128"/>
104	Customer services 客戶服務	<input type="text" value="129"/>	<input type="text" value="130"/>	<input type="text" value="131"/>
105	Others (Please Specify) _____ 其他（請註明）	<input type="text" value="132"/>	<input type="text" value="133"/>	<input type="text" value="134"/>
<b><u>China-related Knowledge</u></b> <b>有關中國的知識</b>				
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	<input type="text" value="135"/>	<input type="text" value="136"/>	<input type="text" value="137"/>
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	<input type="text" value="138"/>	<input type="text" value="139"/>	<input type="text" value="140"/>
203	Trade and industry environment in the mainland of China 在中國內地的行業及營商常規	<input type="text" value="141"/>	<input type="text" value="142"/>	<input type="text" value="143"/>
204	Others (Please Specify) _____ 其他（請註明）	<input type="text" value="144"/>	<input type="text" value="145"/>	<input type="text" value="146"/>
<b><u>IT Skills</u></b> <b>資訊科技的技能</b>				
301	Computer graphics and webpage design 電腦圖像處理與網頁設計	<input type="text" value="147"/>	<input type="text" value="148"/>	<input type="text" value="149"/>
302	E-commerce knowledge and applications 電子商貿的知識及應用	<input type="text" value="150"/>	<input type="text" value="151"/>	<input type="text" value="152"/>
303	Media technology 媒體科技	<input type="text" value="153"/>	<input type="text" value="154"/>	<input type="text" value="155"/>
304	Others (Please Specify) _____ 其他（請註明）	<input type="text" value="156"/>	<input type="text" value="157"/>	<input type="text" value="158"/>

Training Need  
 (represented by 0-5 rating scale)  
 (0 =no need, 5=greatest need)  
 訓練需要  
 (以0-5表示)  
 (0=沒有需要, 5=十分需要)

Code 編號	Type of Skills and/or Knowledge 技能／知識的類別	Managerial Level 經理級	Supervisory Level 主任級	Technical Staff Level 操作人員級
<b>Language Skills</b> <b>語文技能</b>				
401	Spoken English 英語會話	□ 159	□ 160	□ 161
402	Putonghua 普通話	□ 162	□ 163	□ 164
403	Others (Please Specify) _____ 其他（請註明）	□ 165	□ 166	□ 167
<b>Industry Specific Skills</b> <b>業內專業技能</b>				
501	Editing 編輯	□ 168	□ 169	□ 170
502	Artwork/Design 稿件設計	□ 171	□ 172	□ 173
503	Publishing production 出版製作	□ 174	□ 175	□ 176
504	Marketing 市場推廣	□ 177	□ 178	□ 179
505	Sales and customer service 銷售及客戶服務	□ 180	□ 181	□ 182
506	Logistics 物流	□ 183	□ 184	□ 185
507	Others (Please Specify) _____ 其他（請註明）	□ 186	□ 187	□ 188

<u>For official use only</u> 此欄毋須填寫	□ 189	□ 190	□ 191
	□ 192	□ 193	□ 194

End of Questionnaire  
問卷完



**THE 2012 MANPOWER SURVEY OF THE PUBLISHING INDUSTRY**

出版業二零一二年人力調查

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，其後填寫主任級及操作人員級。）

- (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 Employees at Date of Survey (Excluding Trainees) - Column 'C'

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 Employed 12 Months from Now (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 at Date of Survey (Excluding Trainees) - Column ‘E’  
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 at Date of Survey - Column ‘F’  
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.  
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。

11. Example  
例子

To facilitate proper completion, an example is given below for your reference.  
為協助閣下填表，現將例子附錄於後，以供參考。

## **Part II** **第二部分**

12. 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。

13. 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 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晉升的出版業各技能等級僱員人數（各職稱可參見附錄丙）。

14. 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 during the 12 months prior to the survey.

請填寫過去十二個月內，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。

15. 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。

16. 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。）

17. Q.6  
Employees Left  
僱員離職

Please enter the number of employees who had left your establishment in the past 12 months.

請填寫過去十二個月內，貴機構離職的僱員人數。

18. Q.7  
Recruitment  
招聘

- (a) Please enter the number of new recruits in the past 12 months; and  
請填寫過去十二個月內，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。

19. 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. 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。

20. 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. (by ticking up to 3 options).  
請說明貴機構在過去十二個月所遇到的主要招聘困難。(最多可選三項)

21. 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 (represented by a 0-5 rating scale where 0 represents no training need and 5 represents the greatest training need) in the next 12 months in response to the various changes (including Hong Kong's transforming into a knowledge-based economy and China's 12<sup>th</sup> Five-Year Plan).  
為迎合各方面的轉變(包括香港轉型至知識型經濟及中國的《十二五規劃》)，請填寫在未來十二個月，貴機構所需要由培訓機構提供的培訓類別(以0-5表示，0代表沒有需要，5代表十分需要)。

**Example**  
例子

	(A) Job 工作		(B) Monthly Income Code <sup>A</sup> 每月收入 編號	(C) No. of Employees at Date of Survey (excl. trainees) 現有僱員人數 (受訓者除外)	(D) Forecast of No. Employed 12 Months from Now (excl. trainees) 預計 十二個月後 僱員人數 (受訓者除外)	(E) No. of Vacancies at Date of Survey (excl. trainees) 現有 空缺額 (受訓者除外)	(F) No. of Trainees at Date of Survey 現有 受訓者 人數	Enter in column B employee's monthly income range according to the codes below: 將僱員的每月總收入幅度 按下列編號填入B欄內： 1 \$6,500 or below \$6,500 或以下 2 \$6,501 - \$8,000 3 \$8,001 - \$10,000 4 \$10,001 - \$15,000 5 \$15,001 - \$20,000 6 \$20,001 - \$30,000 7 \$30,001 - \$45,000 8 \$45,001 - \$60,000 9 \$60,001 or above \$60,001 或以上
	Title 職稱	Rec. Type 記錄 類型						
1	Managing Director/General Manager/ Publisher/Chief Executive Director/President 董事經理/總經理/出版人/社長	2	8 - 10	11-12	13 - 16	17 - 20	21 - 23	24 - 26
2	Editoria Director/Chief Editor/ Managing Editor/Publishing Director 總編輯/主編	2	1   5   1	8	1	1	0	
3	Commissioning Editor/Acquisition Editor 策劃編輯	2	2   5   1	6	1	1	0	
4	Senior Editor 高級編輯	2	2   5   2	6	3	5	1	
5		2						
6		2						
7		2						
8		2						

**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
<b>MANAGERIAL LEVEL 經理級</b>		
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。

Code No. 編號	Job Title 職 稱	Job Description 工作說明
<b>MANAGERIAL LEVEL (Continued) 經理級 (續)</b>		
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。
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。
<b>SUPERVISORY LEVEL 主任級</b>		
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。



Code No. 編號	Job Title 職 稱	Job Description 工作說明
<b><i>SUPERVISORY LEVEL (Continued)</i></b> <b>主任級 (續)</b>		
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。
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。
<b><i>TECHNICAL STAFF LEVEL</i></b> <b>技術人員級</b>		
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。

Code No. 編號	Job Title 職 稱	Job Description 工作說明
<b>TECHNICAL STAFF LEVEL (Continued) 技術人員級 (續)</b>		
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。
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 June 2013 估計到2013年6月時的僱員人數
<b>TECHNOLOGIST / MANAGERIAL LEVEL 技師／管理級</b>				
General Manager 總經理	345	-	1	346
Production/Quality Manager 生產經理／廠務經理／品質經理	313	-	2	315
Sales / Customer Services / Marketing Manager 營業／客戶服務／市場推廣經理	526	-	-	526
Procurement Manager 採購經理	36	-	-	36
Information Technology Manager (Printing) 資訊科技經理(印刷)	23	-	-	23
Sub-total 小計	1 243	-	3	1 246
<b>TECHNICIAN / SUPERVISORY LEVEL 技術員／督導級</b>				
Cost Estimator 印刷估價員	172	-	1	173
Production Planner / Production Controller / Quality Controller 生產策劃員／生產管制員／品質管制員	616	-	21	637
Sales Representative 營業代表	4 287	2	22	4 313
Overseer/Supervisor 督導員／管理員	507	-	-	507
Electrical & Mechanical Maintenance Technician (Printing) 機電維修(印刷)技術員	325	-	5	330
Designer/Design Officer 設計員/設計主任	475	-	-	475
Prepress Technician 印前技術員	1 176	-	8	1 170
Purchasing Officer/Controller 印刷物料採購員/控制員	156	-	26	182

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 June 2013 估計到2013 年6月時的 僱員人數
<b>TECHNICIAN / SUPERVISORY LEVEL (Continued) 技術員／督導級 (續)</b>				
Technical Services/Products (Printing) Technician 技術/產品(印刷)技術員	186	-	-	186
Information Technology (Printing) Technician 資訊科技(印刷)技術員	62	-	-	66
Sub-total 小計	7 962	2	83	8 039
<b>CRAFTSMAN LEVEL 技工級</b>				
Electronic Prepress System Craftsman 電子印前系統操作技工	626	-	7	627
Offset Lithographic Platemaker 柯式版製作技工	848	-	-	846
Digital Printing System Craftsman 數碼印刷系統操作技工	421	3	3	427
Printing Machine Craftsman (Offset Litho) (Sheet-fed) 單張給紙式柯式平版機 印刷技工	3 174	-	22	3 196
Printing Machine Craftsman (Offset Litho) (Web-fed) 捲筒給紙式柯式平版機 印刷技工	696	-	29	725
Other Printing Machine Craftsman 其他印刷機械技工	399	-	-	399
Binding Craftsman 裝訂技工	1 036	1	4	1 041
Die Cutting / Tool Making Craftsman 啤盒工／造模工	214	-	-	214
Package Finishing Machine Craftsman 包裝盒完成機技工	171	-	-	171
Other Print Finishing Craftsman 其他印後機械技工	306	-	2	308
Sub-total 小計	7 891	4	67	7 954
<b>UNSKILLED LEVEL 非技術人員級</b>				
General Worker 雜工	1 269	-	4	1 273
Sub-total 小計	1 269	-	4	1 273
<b>GRAND TOTAL 總計</b>	<b>18 365</b>	<b>6</b>	<b>157</b>	<b>18 512</b>

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 June 2013 估計到2013年6月時的僱員人數
<b>MANAGERIAL LEVEL 經理級</b>				
Managing Director/ General Manager/Publisher/ Chief Executive Director/President 董事經理／總經理／ 出版人／社長	354	-	2	356
Editorial Director/Chief Editor/ Managing Editor/Publishing Director 總編輯／主編	409	-	-	409
Design Director/Art Director 設計總監／美術總監	142	-	-	142
Production Director/ Production Manager 製作總監／製作經理	83	-	-	83
Marketing Director/ Marketing Manager 市場總監／市場經理	200	-	-	200
Sales Director/Sales Manager (Newspaper and Magazine Publications) 營業總監／營業經理（報刊）	210	-	-	210
Sales Director/Sales Manager (Book Publications) 營業總監／營業經理監事（書刊）	95	-	-	95
Editorial Manager 編輯經理	114	-	-	114
Manager (E-publishing) 電子出版經理	26	-	-	26
Sub-total 小計	1 633	-	2	1 635
<b>SUPERVISORY LEVEL 主任級</b>				
Commissioning Editor/ Acquisition Editor 策劃編輯	193	-	-	193
Senior Editor 高級編輯	1 121	-	7	1 128

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 June 2013 估計到2013年6月時的僱員人數
<b>SUPERVISORY LEVEL (Continued) 主任級 (續)</b>				
Designer 設計師	570	-	4	574
Production Supervisor 製作主任	125	-	-	125
Sales Supervisor 營業主任	770	-	10	780
Marketing/Publicity Supervisor 市場/宣傳主任	202	-	2	204
Customer Services Supervisor/ Officer (Books) 客戶服務主任 (書籍)	132	-	-	132
Circulation Supervisor (Magazine & Newspapers) 發行主任 (報刊)	99	-	-	99
Supervisor (E-publishing) 電子出版主任	144	-	-	144
Sub-total 小計	3 356	-	23	3 379
<b>TECHNICAL STAFF LEVEL 技術人員級</b>				
Assistant Editor/Copy Editor/ Art Editor/Proof Reader 助理編輯/稿件編輯/ 美術編輯/校對員	1 569	-	19	1588
Art Designer 美術設計員	431	-	1	432
Illustrator 插圖員	151	-	3	154
Desktop Publishing (DTP) Operator 桌面排版操作員	411	-	-	411
Production Assistant 製作助理	297	-	4	301
Sales Representative/ Sales Executive 營業代表/營業主任	1 588	-	44	1 629
Marketing/Publicity Assistant 市務助理/宣傳助理	445	-	16	461

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 June 2013 估計到2013年6月時的僱員人數
<b>TECHNICAL STAFF LEVEL 技術人員級 (續)</b>				
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)	19	-	-	19
Sub-total 小計	4 911	-	87	4 995
GRAND TOTAL 總計	9 900	-	112	10 009

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 5 - 7 證書/ 中五至 中七程度	Craft Certificate/ Below Secondary 5 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	513	296	351	39	-	44	1 243
Technician/ Supervisory 技術員／督導	351	1 715	1 687	3 823	58	328	7 962
Craftsman 技工	-	-	296	3 057	4 082	456	7 891
Total Number of Employees 總計	864	2 011	2 334	6 919	4 140	828	17 096



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 5 - 7 證書/ 中五至 中七程度	Below Secondary 5 中五以下 程度	Unspecified 未列明者	Total Number of Employees 總計
Managerial 經理	1 455	40	30	25	-	83	1 633
Supervisory 主任	1 604	1 129	220	158	-	245	3 356
Technical Staff 技術人員	476	1 648	1 259	826	109	593	4 911
Total 總計	3 535	2 817	1 509	1 009	109	921	9 900

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	621	185	330	38	17	6	46	1 243
Technician/ Supervisory 技術員／ 督導	938	2 225	2 337	1 932	147	55	328	7 962
Craftsman 技工	748	674	1 643	2 774	1 444	152	456	7 891
Total 總計	2 307	3 084	4 310	4 744	1 608	213	830	17 096

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	1 262	166	77	3	-	12	113	1 633
Supervisory 主任	509	1 297	1 109	122	-	2	317	3 356
Technical Staff 技術人員	323	793	2 377	624	161	79	554	4 911
Total 總計	2 094	2 256	3 563	749	161	93	984	9 900

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	1 197	-	2	44	1 243
Technician/ Supervisory 技術員／督導	7 561	38	35	328	7 962
Craftsman 技工	7 130	305	-	456	7 891
Total 總計	15 888	343	37	828	17 096

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	1 533	-	17	83	1 633
Supervisory 主任	3 106	-	5	245	3 356
Technical Staff 技術人員	4 362	-	4	545	4 911
Total 總計	9 001	-	26	873	9 900

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	\$6,500 or below 或以下	\$6,501 - \$8,000	\$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
<b>TECHNOLOGIST/MANAGERIAL LEVEL 技師／管理級</b>											
General Manager 總經理	-	-	-	-	32	161	74	38	19	21	345
Production/Quality Manager 生產經理／廠務經 理／ 品質經理	-	-	-	18	64	114	57	13	17	30	313
Sales / Customer Services / Marketing Manager 營業／客戶服務／ 市場推廣經理	-	-	3	20	145	225	52	9	10	62	526
Procurement Manager 採購經理	-	-	-	4	3	17	5	1	1	5	36
Information Technology Manager (Printing) 資訊科技經理 (印 刷)	-	-	-	-	-	15	5	-	1	2	23
Sub-total 小計	-	-	3	42	244	532	193	61	48	120	1 243
<b>TECHNICIAN/SUPERVISORY LEVEL 技術員／督導級</b>											
Cost Estimator 印刷估價員	-	-	3	74	60	18	-	-	-	17	172
Production Planner / Production Controller / Quality Controller 生產策劃員／生產 管制員／品質管制 員	-	-	29	157	247	78	-	1	13	91	616
Sales Representative 營業代表	173	114	538	1 740	1 150	285	17	23	13	234	4 287
Overseer/ Supervisor 督導員／管理員	-	-	7	141	242	89	5	-	-	23	507
Electrical & Mechanical Maintenance Technician (Printing) 機電維修 (印刷) 技術員	-	-	3	42	239	20	1	-	-	20	325

Job 職稱	\$6,500 or below 或以下	\$6,501 - \$8,000	\$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
<b>TECHNICIAN/SUPERVISORY LEVEL (Continued) 技術員／督導級（續）</b>											
Designer/Design Officer 設計員/設計主任	-	20	70	226	103	20	-	-	-	36	475
Prepress Technician 印前技術員	7	-	148	564	327	30	-	-	-	100	1 176
Purchasing Officer/Controller 印刷物料採購員/ 控制員	-	-	2	60	56	23	-	-	-	15	156
Technical Services/Products (Printing) Technician 技術/產品(印刷)技 術員	-	-	-	28	151	7	-	-	-	-	186
Information Technology (Printing) Technician 資訊科技(印刷)技 術員	-	-	6	11	30	8	-	-	-	7	62
Sub-total 小計	180	134	806	3 043	2 605	578	23	24	26	543	7 962
<b>CRAFTSMAN LEVEL 技工級</b>											
Electronic Prepress System Craftsman 電子印前系統操作 技工	-	-	118	398	37	-	5	-	-	68	626
Offset Lithographic Platemaker 柯式版製作技工	20	28	109	585	45	-	4	-	-	57	848
Digital Printing System Craftsman 數碼印刷系統操作 技工	-	1	213	191	12	-	1	-	-	3	421
Printing Machine Craftsman (Offset Litho) (Sheet-fed) 單張給紙式柯式平 版機 印刷技工	40	110	750	1 967	80	23	-	-	-	204	3 174
Printing Machine Craftsman (Offset Litho) (Web-fed) 捲筒給紙式柯式平 版機 印刷技工	-	-	26	568	4	-	-	-	-	98	696
Other Printing Machine Craftsman 其他印刷機械及包 裝印刷操作技工	-	27	136	188	6	-	-	-	-	42	399
Binding Craftsman 裝訂技工	-	67	345	479	48	-	-	-	-	97	1 036

Job 職稱	\$6,500 or below 或以下	\$6,501 - \$8,000	\$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
Die Cutting / Tool Making Craftsman 啤盒工/造模工	7	12	115	43	13	-	-	-	-	24	214
Package Finishing Machine Craftsman 包裝盒完成機技工	-	24	40	92	-	-	-	-	-	15	171
Other Print Finishing Craftsman 其他印後機械技工	-	2	132	135	20	-	-	-	-	17	306
Sub-total 小計	67	271	1 984	4 646	265	23	10	-	-	625	7 891
UNSKILLED LEVEL 非技術人員級											
General Worker 雜工	6	266	768	99	-	-	-	-	-	130	1 269
Sub-total 小計	6	266	768	99	-	-	-	-	-	130	1 269
GRAND TOTAL 總計	253	671	3 561	7 830	3 114	1 133	226	85	74	1 418	18 365



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	\$6,000 or below 或以下	\$6,001 - \$8,000	\$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	-	-	-	-	3	107	50	68	37	89	354
Editorial Director/ Chief Editor/ Managing Editor/ Publishing Director 總編輯／主編	-	-	-	-	4	133	157	37	26	52	409
Design Director/ Art Director 設計總監／ 美術總監	-	-	-	-	8	57	49	4	8	16	142
Production Director/ Production Manager 製作總監／ 製作經理	-	-	-	-	-	30	31	3	3	16	83
Marketing Director/ Marketing Manager 市場總監／ 市場經理	-	-	-	10	12	47	100	16	1	14	200
Sales Director/Sales Manager (Newspaper and Magazine Publications) 營業總監／營業 經理（報刊）	-	-	-	14	16	43	73	24	34	6	210
Sales Director/ Sales Manager (Book Publications) 營業總監／營業 經理（書刊）	-	-	-	3	8	23	35	4	11	11	95
Editorial Manager 編輯經理	-	-	-	-	4	31	42	3	-	34	114
Manager (E-publishing) 電子出版經理	-	-	-	-	-	9	10	-	-	7	26
Sub-total 小計	-	-	-	27	55	480	547	159	120	245	1 633

Job 職稱	\$6,000 or below 或以下	\$6,001 - \$8,000	\$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
<b>SUPERVISORY LEVEL 主任級</b>											
Commissioning Editor/Acquisition Editor 策劃編輯	-	67	-	-	56	32	25	-	-	13	193
Senior Editor 高級編輯	-	-	3	20	502	420	69	3	-	104	1 121
Designer 設計師	-	-	-	12	247	181	-	7	-	123	570
Production Supervisor 製作主任	-	-	-	6	62	26	3	1	-	27	125
Sales Supervisor 營業主任	-	-	5	110	342	163	50	-	30	70	770
Marketing/Publicity Supervisor 市場/宣傳主任	-	-	-	39	74	60	-	14	-	15	202
Customer Services Supervisor/Officer (Books) 客戶服務主任 (書籍)	-	-	-	54	62	16	-	-	-	-	132
Circulation Supervisor (Magazine & Newspapers) 發行主任(報刊)	-	-	-	4	33	38	11	-	-	13	99
Supervisor (E-publishing) 電子出版主任	68	-	-	8	11	8	33	-	-	16	144
Sub-total 小計	68	67	8	253	1 389	944	191	25	30	381	3 356
<b>TECHNICAL STAFF LEVEL 技術人員級</b>											
Assistant Editor/ Copy Editor/ Art Editor/ Proof Reader 助理編輯/稿件 編輯/美術編輯/ 校對員	-	-	102	609	456	18	-	1	-	383	1 569
Art Designer 美術設計員	-	-	4	195	151	11	-	-	-	70	431
Illustrator 插圖員	-	-	8	102	15	-	-	-	-	26	151
Desktop Publishing (DTP) Operator 桌面排版操作員	-	-	19	99	123	11	-	-	-	159	411
Production Assistant 製作助理	-	-	50	151	61	6	-	-	-	29	297
Sales Representative Sales Executive 營業代表/營業 主任	9	10	283	636	244	70	102	-	20	214	1 588
Marketing/Publicity Assistant 市務助理/宣傳助 理	-	-	108	249	30	26	-	-	-	32	445

Job 職稱	\$6,000 or below 或以下	\$6,001 - \$8,000	\$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 (Continued) 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	-	-	-	1	19
Sub-total 小計	9	10	574	2 041	1 080	160	102	1	20	914	4 911
GRAND TOTAL 總計	77	77	582	2 321	2 524	1 584	840	185	170	1 540	9 900

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	No. of Employees 僱員人數					
	Technologist/Managerial 技師／管理		Technician/Supervisory 技術員／督導		Craftsman 技工	
	Need 需要	Great Need 十分需要	Need 需要	Great Need 十分需要	Need 需要	Great Need 十分需要
<b>Management Skills 管理技能</b>						
Production Management 製作管理	33	29	70	35	9	3
Quality Management 品質管理	33	29	71	50	16	4
Marketing Management 經銷管理	34	15	85	32	3	-
Customer Services 客戶服務	36	14	92	50	5	-
<b>China-related Knowledge 有關中國的知識</b>						
Political, Social and Economic Development in the Mainland China 在中國內地的政治、 社會和經濟發展	26	7	48	1	-	-
Laws and Regulatory Restrictions for Access to China Market 進入中國市場的法律 和經濟發展	24	7	73	2	-	-
Trade and Industry Environment in Mainland China 在中國內地的行業及 營商常規	10	8	72	15	-	-
<b>IT Skills 資訊科技的技能</b>						
Computer Graphics and Webpage 電腦圖像處理與網頁設計	42	14	96	68	11	1
E-commerce Knowledge and Applications 電子商貿的知識及應用	49	9	130	34	3	-
Media Technology 媒體科技	54	10	103	35	12	-
<b>Language Skills 語文技能</b>						
Spoken English 英語會話	45	13	131	18	30	-
Putonghua 普通話	61	10	131	34	27	3

Job Title 職稱	No. of Employees 僱員人數					
	Technologist/Managerial 技師／管理		Technician/Supervisory 技術員／督導		Craftsman 技工	
	Need 需要	Great Need 十分需要	Need 需要	Great Need 十分需要	Need 需要	Great Need 十分需要
Industry Specific Skills 業內專業技能						
Pre-press Technique 印前技術	28	24	88	53	16	30
Printing Technique 印刷技術	57	15	101	41	15	32
Post-printing Technique 印後技術	25	15	67	42	8	33
Production Coordination and Project Management 生產協調及項目管理	28	14	56	51	15	11
Estimation and Costing 估價及成本	21	21	70	62	8	12
Repair and Maintenance 機械維修及保養	13	7	37	24	9	15
Colour Management 色彩管理	22	25	60	52	9	29
Products Structure 產品結構	28	15	68	24	9	13
Materials Application 物料應用	28	25	51	49	8	24
Quality Assurance 品質保證	23	30	73	55	8	29

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	No. of Employees 僱員人數					
	Managerial 經理		Supervisory 主任		Technical Staff 技術人員	
	Need 需要	Great Need 十分需要	Need 需要	Great Need 十分需要	Need 需要	Great Need 十分需要
<b>Management Skills 管理技能</b>						
Production Management 製作管理	12	6	17	-	5	2
Quality Management 品質管理	8	10	15	2	5	4
Marketing Management 經銷管理	45	13	48	-	13	-
Customer Services 客戶服務	43	12	49	2	14	2
<b>China-related Knowledge 有關中國的知識</b>						
Political, Social and Economic Development in the Mainland China 在中國大陸的政治、 社會和經濟發展	5	4	4	4	2	-
Laws and Regulatory Restrictions for Access to China Market 進入中國市場的法律 和經濟發展	9	4	8	4	6	-
Trade and Industry Environment in Mainland China 在中國大陸的行業及 營商常規	15	4	14	4	10	-
<b>IT Skills 資訊科技的技能</b>						
Computer Graphics and Webpage 電腦圖像處理與網頁設計	45	7	53	2	26	39
E-commerce Knowledge and Applications 電子商貿的知識及應用	10	6	17	-	21	38
Media Technology 媒體科技	44	11	51	5	22	41
<b>Language Skills 語文技能</b>						
Spoken English 英語會話	46	6	55	12	24	10
Putonghua 普通話	12	10	24	12	22	10

Job Title 職稱	No. of Employees 僱員人數					
	Managerial 經理		Supervisory 主任		Technical Staff 技術人員	
	Need 需要	Great Need 十分需要	Need 需要	Great Need 十分需要	Need 需要	Great Need 十分需要
Industry Specific Skills 業內專業技能						
Editing 編輯	14	4	15	8	23	-
Artwork/Design 稿件設計	7	4	17	6	25	6
Publishing Production 出版製作	8	6	16	6	22	4
Marketing 市場推廣	9	8	16	8	17	2
Sales and Customer Service 銷售及客戶服務	5	6	12	10	20	2
Logistics 物流	6	4	7	6	9	-

**FORECAST ANNUAL ADDITIONAL SKILLS DEMAND  
BETWEEN 2013 AND 2015 IN THE PRINTING INDUSTRY**

預測 2013 至 2015 年間  
印刷業技術僱員的需求數目

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 2013 and 2015 預測 2013 至 2015 年每年 技術人員的 需求數目
<b>TECHNOLOGIST/MANAGERIAL LEVEL 技師／管理級</b>		
General Manager 總經理	345	23 – 28
Production/Quality Manager 生產經理／廠務經理／ 品質經理	313	25 – 31
Sales / Customer Services / Marketing Manager 營業／客戶服務／ 市場推廣經理	526	53 – 65
Procurement Manager 採購經理	36	2
Information Technology Manager (Printing) 資訊科技經理 (印刷)	23	2
Sub-total 小計	1 243	105 – 128
<b>TECHNICIAN/SUPERVISORY LEVEL 技術員／督導級</b>		
Cost Estimator 印刷估價員	172	9 – 11
Production Planner / Production Controller / Quality Controller 生產策劃員／生產管制員／ 品質管制員	616	37 – 45
Sales Representative 營業代表	4 287	201 – 245
Overseer/Supervisor 督導員／管理員	507	20 – 24
Electrical & Mechanical Maintenance Technician (Printing) 機電維修 (印刷) 技術員	325	13 – 15
Designer/Design Officer 設計員／設計主任	475	23 – 29



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 2013 and 2015 預測 2013 至 2015 年每年 技術人員的 需求數目
<b>TECHNICIAN/SUPERVISORY LEVEL (Continued) 技術員／督導級 (續)</b>		
Prepress Technician 印前技術員	1 176	36 – 44
Purchasing Officer/Controller 印刷物料採購員／控制員	156	6 – 8
Technical Services/Products (Printing) Technician 技術／產品 (印刷) 技術員	186	10 – 12
Information Technology (Printing) Technician 資訊科技 (印刷) 技術員	62	2 – 4
Sub-total 小計	7 962	357 – 437
<b>CRAFTSMAN LEVEL 技工級</b>		
Electronic Prepress System Craftsman 電子印前系統操作技工	626	26 – 30
Offset Lithographic Platemaker 柯式版製作技工	848	15 – 19
Digital Printing System Craftsman 數碼印刷系統操作技工	421	6 – 8
Printing Machine Craftsman (Offset Litho) (Sheet-fed) 單張給紙式柯式平版機 印刷技工	3 174	115 – 141
Printing Machine Craftsman (Offset Litho) (Web-fed) 捲筒給紙式柯式平版機 印刷技工	696	20 – 24
Other Printing Machine Craftsman 其他印刷機械技工	399	17 – 21
Binding Craftsman 裝訂技工	1 036	34 – 42
Die Cutting / Tool Making Craftsman 啤盒工／造模工	214	8 – 10
Package Finishing Machine Craftsman 包裝盒完成機技工	171	5 – 7
Other Print Finishing Craftsman 其他印後機械技工	306	14 – 16
Sub-total 小計	7 891	260 – 318

**FORECAST ANNUAL ADDITIONAL SKILLS DEMAND  
BETWEEN 2013 AND 2015 IN THE PUBLISHING INDUSTRY**

預測 2013 至 2015 年間  
出版業技術僱員的需求數目

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 2013 and 2015 預測 2013 至 2015 年每年 技術人員的 需求數目
<b>MANAGERIAL LEVEL 經理級</b>		
Managing Director/ General Manager/Publisher/ Chief Executive Director/ President 董事經理／總經理／ 出版人／社長	354	15 – 16
Editorial Director/Chief Editor/ Managing Editor/Publishing Director 總編輯／主編	409	12 – 14
Design Director/Art Director 設計總監／美術總監	142	4 – 6
Production Director/ Production Manager 製作總監／製作經理	83	4 – 5
Marketing Director/ Marketing Manager 市場總監／市場經理	200	7 – 9
Sales Director/Sales Manager (Newspaper and Magazine Publications) 營業總監／營業經理（報刊）	210	6 – 8
Sales Director/Sales Manager (Book Publications) 營業總監／ 營業經理監事（書刊）	95	3 – 5
Editorial Manager 編輯經理	114	9 – 11
Manager (E-publishing) 電子出版經理	26	1
Sub-total 小計	1 633	61 – 75

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 2013 and 2015 預測 2013 至 2015 年每年 技術人員的 需求數目
<b>SUPERVISORY LEVEL 主任級</b>		
Commissioning Editor/ Acquisition Editor 策劃編輯	193	18 – 20
Senior Editor 高級編輯	1 121	42 – 50
Designer 設計師	570	16 – 20
Production Supervisor 製作主任	125	3 – 5
Sales Supervisor 營業主任	770	26 – 32
Marketing/Publicity Supervisor 市場／宣傳主任	202	6 – 8
Customer Services Supervisor/ Officer (Books) 客戶服務主任（書籍）	132	6 – 8
Circulation Supervisor (Magazine & Newspapers) 發行主任（報刊）	99	5 – 7
Supervisor (E-publishing) 電子出版主任	144	1
Sub-total 小計	3 356	123 – 151
<b>TECHNICAL STAFF LEVEL 技術人員級</b>		
Assistant Editor/Copy Editor/ Art Editor/Proof Reader 助理編輯／稿件編輯／ 美術編輯／校對員	1 569	42 – 52
Art Designer 美術設計員	431	17 -21
Illustrator 插圖員	151	4 – 5
Desktop Publishing (DTP) Operator 桌面排版操作員	411	10 – 12
Production Assistant 製作助理	297	5 – 7
Sales Representative/ Sales Executive 營業代表／營業主任	1 588	44 – 54
Marketing/Publicity Assistant 市務助理／宣傳助理	445	13 – 15

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 2013 and 2015 預測 2013 至 2015 年每年 技術人員的 需求數目
<b>TECHNICAL STAFF LEVEL 技術人員級(Continued) (續)</b>		
Other Publishing Related Jobs 其他出版業有關職位	19	1
Sub-total 小計	4 911	136 - 166

**新技能提升計劃課程一覽表**  
**Courses Offered under the Skills Upgrading Scheme Plus**  
**(up to 31 March 2013)**

<b>課程名稱</b>	<b>課程編號</b>	<b>時數(小時)</b>	<b>培訓機構**</b>
<b>軟性技巧、管理及營銷課程</b>			
印刷估價單元證書	AT002ES	30	3
印刷製作基本流程單元證書	GA005ES	24	2
印刷業務推廣及市場策略單元證書	LN023ES / LN013HS	38	6
印刷品質檢定及國際印刷標準認識單元證書	GA001ES	24	2
印刷營銷技巧單元證書	LN030ES / LN020HS	15	6
印刷物流控制及中國進出口海關 通關實務單元證書	LN025ES / LN015HS	28	6
印刷物流控制及及運輸貨物保險單元證書	LN024ES / LN014HS	25	6
印刷業的財務管理技巧單元證書	GA004ES	4	2
印刷業的危機管理技巧單元證書	OS006HS	4	5
<b>印前技術（基礎）課程</b>			
基礎數碼商業攝影單元證書	SJ045ES	24	4
基礎電腦相片修描 PhotoShop CS單元證書	AT010ES / VT154ES / VT082HS	20	1,3
基礎電腦小版製作 InDesign CS單元證書	AT009ES	20	3
基礎電腦繪圖 Illustrator CS 單元證書	AT011ES / VT155ES / VT083HS	20	1,3
基礎平面設計與印刷單元證書	AT007ES	30	3
<b>印前技術（進階）課程</b>			
進階數碼攝影商業攝影單元證書	SJ046ES	20	4
進階電腦相片修描 PhotoShop CS單元證書	AT014ES	20	3
進階電腦小版製作 InDesign CS單元證書	AT013ES	20	3
進階電腦繪圖 Illustrator CS單元證書	AT015ES	20	3

<u>課程名稱</u>	<u>課程編號</u>	<u>時數(小時)</u>	<u>培訓機構**</u>
<b><u>印前技術／生產流程／色彩管理課程</u></b>			
印刷疑難分析及解決技巧單元證書	GA002ES	24	2
基礎平張柯式印刷理論單元證書	VT152ES / VT080HS	20	1
進階平張柯式印刷理論單元證書	VT156ES / VT084HS	20	1
基礎平張柯式印刷操作單元證書	VT153ES / VT081HS	30	1
進階平張柯式印刷操作單元證書	VT157ES / VT085HS	30	1
基礎色彩管理應用技巧單元證書	AT008ES	25	3
<b><u>出版課程</u></b>			
書刊出版之設計及印製概論單元證書	GA003ES	26	2
電子書刊出版基礎單元證書	AT020ES	15	3

**\*\* 培訓機構**

機構名稱	聯絡方法
(1) 職業訓練局 (匯縱專業發展中心)	地 址：青衣青衣路20號 電 話：2751 5825
(2) 香港印藝學會有限公司	地 址：觀塘鴻圖道47號文化傳信中心12樓A室 電 話：2856 9760
(3) 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 D004 及D004A室 電 話：3928 2545
(4) 聖雅各福群會	地 址：灣仔石水渠街85號 電 話：2116 3147
(5) 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
(6) 嶺南大學持續進修學院	地 址：尖沙咀麼地道66號尖沙咀中心2樓 電 話：2723 3398

**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**

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**印刷科****Printing Stream**

<u>編號</u> Code	<u>模式</u> Mode	<u>課程名稱</u> Title	<u>修業期</u> Durations
61327	Full-time 全日制	Higher Diploma in Printing and Publishing 印刷及出版高級文憑	3 years 三年
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

**設計及數碼媒體科****Design and Digital Media Stream**

<u>編號</u> Code	<u>模式</u> Mode	<u>課程名稱</u> Title	<u>修業期</u> Durations
61397	Full-time 全日制	Higher Diploma in Film and Television 電影及電視高級文憑	3 years 三年
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
61391	Full-time 全日制	Higher Diploma in Creative Media Design 創意媒體高級文憑	3 years 三年
61396	Full-time 全日制	Higher Diploma in Animation, Comics and Visual Effects 動畫、漫畫及視覺特效高級文憑	3 years 三年
DE114102	Full-time 全日制	Higher Diploma in Creative Media 創意媒體高級文憑	2 years 二年
61394	Full-time 全日制	Higher Diploma in Advertising Design 廣告設計高級文憑	3 years 三年
DE114101	Full-time 全日制	Higher Diploma in Advertising Design 廣告設計高級文憑	2 years 二年
61336	Full-time 全日制	Higher Diploma in Digital Music and Media 數碼音樂及媒體高級文憑	3 years 三年
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
61305	Full-time 全日制	Higher Diploma in Visual Communication 視覺傳意高級文憑	3 years 三年
DE114106	Full-time 全日制	Higher Diploma in Visual Communication 視覺傳意高級文憑	2 years 二年
65915F	Part-time 晚間制	Higher Diploma in Visual Communication 視覺傳意高級文憑	3 years 三年
65937F	Part-time 晚間制	Higher Diploma in Digital Media Design 數碼媒體設計高級文憑	3 years 三年