

# 二零一八年按經濟行業劃分 的人力需求推算

## Manpower Requirement Projection to 2018 by Economic Sector



中華人民共和國  
香港特別行政區 政府統計處  
Census and Statistics Department  
Hong Kong Special Administrative Region  
People's Republic of China



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## I. 引言

1. 政府不時進行人力資源推算，以協助制訂人力發展的政策。自二零零九年第四季起因經濟復蘇後出現新的商機和挑戰，勞工及福利局在二零一零年上半年展開新一輪以二零一零年為基準年的人力資源推算，推算期至二零一八年。該推算工作是在跨部門的「二零一八年人力資源推算工作小組」監督下進行，小組成員包括相關政府決策局／部門和公共機構的代表。

2. 二零一八年人力資源推算由兩個主要部分組成：人力供應推算和人力需求推算。通過把人力供應推算和人力需求推算作出比較，便可得出人力資源供求差額的推算，以便評估本港在二零一八年各教育程度<sup>1</sup>的人力資源過剩或短缺情況。

## I. Introduction

1. The government conducts manpower projection (MP) from time to time to facilitate the formulation of policies on manpower development. Along with the emerging of new business opportunities and challenges after the recovery of the economy since the fourth quarter of 2009, a new round of MP up to 2018 (MP2018) was launched by the Labour and Welfare Bureau (LWB) in the first half of 2010, with 2010 as the base year. The 2010-based MP2018 was conducted under the steer of the inter-departmental Working Group on MP2018 (WG on MP2018), which comprised representatives from relevant government Bureaux/Departments (B/Ds) and public organisations.

2. There were two main components in MP2018 – the Manpower Supply Projection (MSP) and the Manpower Requirement Projection (MRP). By comparing the MSP and MRP, the projected Manpower Resource Balance (MRB) was derived to assess whether there would be manpower resource surplus or shortage at various education levels<sup>1</sup> in Hong Kong up to 2018.

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<sup>1</sup> 教育程度指個人完成的最高教育程度（其專業資格不視為考慮因素），如一名已完成工程學士學位的人士，無論是否擁有專業資格，也被列為具有「學士學位」的教育程度。

<sup>1</sup> Education level refers to the highest level of education completed by a person with no regard to his/her professional qualifications. For instance, a person holding a bachelor's degree in engineering with or without professional qualifications will be classified as having an education level at "first degree" level.

3. 如過往的人力資源推算工作一樣，按經濟行業劃分的二零一八年人力需求推算由政府統計處（統計處）編製，有關推算結果主要供勞工及福利局<sup>2</sup>用作編製按職業類別和教育程度劃分的人力需求的輸入數據。二零一八年人力需求推算的結果亦有助政府及其他有關各方作規劃用途。

4. 本報告提供二零一八年按經濟行業劃分的人力需求推算的編製方法，以及反映當時可獲得的數據而進行編製後得出的推算結果。

3. As in the past MP exercises, Manpower Requirement Projection to 2018 (MRP2018) by economic sector was compiled by the Census and Statistics Department (C&SD). The findings served as data input for the LWB<sup>2</sup> to compile further breakdowns by occupation and educational level. The MRP2018 results are also useful for the government and other relevant parties for planning purposes.

4. This report presents the methodology of compiling the MRP2018 by economic sector, as well as the results, which reflect the data available at the time when the projection was compiled.

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<sup>2</sup> 勞工及福利局亦負責編製按年齡組別、性別及教育程度劃分的人力供應推算。

<sup>2</sup> LWB was also responsible for compiling MSP by age group, sex and educational level.



## II. 方法

### 涵蓋範圍

5. 除外籍家庭傭工外，二零一八年按經濟行業劃分的人力需求推算包括所有香港的受僱人士（不論他們在何地工作），並估算本港未來的整體人力需求。受內地或其他地方的公司僱用的居港人口<sup>3</sup>也包括在內。

### 基準年

6. 是次人力需求推算的基準年是二零一零年。

## II. Methodology

### Coverage

5. The MRP2018 by economic sector covered all employed persons in Hong Kong, excluding foreign domestic helpers (FDHs), and forecasted the total manpower requirement in Hong Kong, regardless of the actual place of work. Persons employed by firms in the Mainland of China and other places were included if they belonged to the Hong Kong Resident Population<sup>3</sup>.

### Base year

6. The base year of the current round of MRP2018 is 2010.

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<sup>3</sup> 「居港人口」在統計上的定義包括「常住居民」和「流動居民」。「常住居民」包括兩類人士：(一)在統計時點之前的六個月內，在港逗留最少三個月，又或在統計時點之後的六個月內，在港逗留最少三個月的香港永久性居民，不論在統計時點他們是否身在香港；及(二)在統計時點身在香港的非永久性居民。至於「流動居民」，是指在統計時點之前的六個月內，在港逗留最少一個月但少於三個月，又或在統計時點之後的六個月內，在港逗留最少一個月但少於三個月的香港永久性居民，不論在統計時點他們是否身在香港。

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<sup>3</sup> “Hong Kong Resident Population” is statistically defined to include “Usual Residents” and “Mobile Residents”. “Usual Residents” refer to two categories of people: (a) Hong Kong Permanent Residents who have stayed in Hong Kong for at least three months during the six months before or for at least three months during the six months after the reference time-point, regardless of whether they are in Hong Kong or not at the reference time-point; and (b) Hong Kong Non-permanent Residents who are in Hong Kong at the reference time-point. As for “Mobile Residents”, they are Hong Kong Permanent Residents who have stayed in Hong Kong for at least one month but less than three months during the six months before or for at least one month but less than three months during the six months after the reference time-point, regardless of whether they are in Hong Kong or not at the reference time-point.

## 編製方法

7. 按經濟行業劃分的二零一八年人力需求推算的編製步驟大致如下：

- (一) 就按經濟行業劃分的二零一八年人力需求推算選定合適的行業組合和訂定各推算組別的涵蓋範圍；
- (二) 進行人力需求的量化推算；
- (三) 就通過廣泛諮詢和桌上研究所收集得來的資料進行質量分析；以及
- (四) 對按主要行業類別及策略性行業劃分的二零一八年人力需求推算及按六項優勢產業劃分的二零一五年人力需求推算的結果進行評核。

## Compilation methodology

7. The steps involved in compiling the MRP2018 by economic sector can be broadly described as below :

- (a) Identifying an appropriate industry grouping for MRP2018 by economic sector and defining the coverage of each of the projection groups;
- (b) Performing quantitative projection of MRP;
- (c) Performing qualitative analysis of information gathered through extensive consultations and desktop research; and
- (d) Evaluating the results of MRP by major industry group and strategic sector to 2018 and for the Six Industries to 2015.

**(甲) 就按經濟行業劃分的二零一八年人力需求推算選定合適的行業組合和訂定各推算組別的涵蓋範圍**

8. 「二零一八年人力資源推算工作小組」由勞工及福利局領導，小組成員來自相關政府決策局／部門和公共機構的代表，負責監督和指導二零一八年人力資源推算的工作。

9. 二零一八年人力需求推算共有四十個行業類別分項，當中二十八個是根據《香港標準行業分類2.0版》<sup>4</sup>擬成的。這二十八個行業類別組成整個本港經濟，並可進一步整合成十二個經濟行業。

**(A) Identifying an appropriate industry grouping for MRP2018 by economic sector and defining the coverage of each of the projection groups**

8. The WG on MP2018, which is led by LWB with representatives from relevant government B/Ds and public organisations as members, oversees and provides steer in respect of the work of MP2018.

9. A total of 40 industry groups have been identified for the MRP2018, of which 28 are modelled under the Hong Kong Standard Industrial Classification Version 2.0 (HSIC V2.0)<sup>4</sup>. These 28 industry groups, which make up the economy, can be further aggregated to form 12 economic sectors.

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<sup>4</sup> 《香港標準行業分類》是一個分類架構，藉以根據經濟單位的主要經濟活動，把它們撥歸不同的行業類別。這可作為香港的經濟單位的標準行業分類，用以編製和發布按經濟活動劃分的統計數字。目前的2.0版是根據聯合國的《所有經濟活動的國際標準行業分類修訂本第4版》作出適當的修訂，以反映本港經濟結構，並於二零零八年十月推出。

<sup>4</sup> Hong Kong Standard Industrial Classification (HSIC) is a classification framework for classifying economic units into industry classes based on their major economic activities. It serves as a standard industrial classification of economic units in Hong Kong for compilation and dissemination of statistics by economic activity. The current version HSIC V2.0 was introduced in October 2008 and was adapted from the International Standard Industrial Classification of All Economic Activities (ISIC) Revision 4 of the United Nations to reflect the structure of the local economy.

10. 餘下的十二個行業類別統稱為策略性行業，包括四大支柱行業<sup>5</sup>、六項優勢產業<sup>6</sup>、「資訊科技及資訊服務」和「資訊科技人員」<sup>7</sup>。由於這些行業對香港經濟的長遠競爭力具策略重要性，因此獲選定作分析用途。

10. The remaining 12 industry groups, which are collectively known as strategic sectors, include the Four Pillar Industries<sup>5</sup>, the Six Industries<sup>6</sup>, the information technology and information services (IT&IS) sector, and information technology (IT) personnel<sup>7</sup>. These sectors were identified for analysis as they all have strategic importance to the long-term competitiveness of Hong Kong.

<sup>5</sup> 四大支柱行業是金融服務、貿易及物流、專業服務及旅遊業。在二零一八年人力資源推算中，專業服務業的涵蓋範圍包括「人類保健活動」（在MG12.1內《香港標準行業分類2.0版》編碼86和871），但不包括「其他工商業支援服務」，有別於統計處例行發布的香港四個主要行業統計數字所採用的涵蓋範圍。

<sup>6</sup> 獲經濟機遇委員會確認為香港具競爭條件的六項優勢產業，由行政長官在二零零九至一零年施政報告中首次提出。它們包括醫療產業、教育產業、文化及創意產業、創新科技產業、檢測及認證產業，和環保產業。有關產業的涵蓋範圍刊載於二零一一年二月號《香港統計月刊》內的專題文章「香港六項優勢產業在二零零八年及二零零九年的情況」。

<sup>7</sup> 有關分析從「職業」的角度進行，只涵蓋在不同行業類別中從事有關資訊科技職業的人員。這有別於對其他策略性行業如「資訊科技及資訊服務」業從「行業」角度所作的分析，後者涵蓋所有從事該行業的人員，包括資訊科技職業（如系統管理人員和程式分析員）和非資訊科技職業（如文員和服務人員）。

<sup>5</sup> The Four Pillar Industries are Financial services, Trading and logistics, Professional services and Tourism. Coverage of Professional services in MP2018, which includes “Human health activities” (HSIC V2.0 codes 86 and 871 in MG12.1), but excludes “Other producer services”, is different from that adopted by C&SD in their routine publication of statistics on the Four Key Industries in Hong Kong.

<sup>6</sup> The Six Industries were identified by the Task Force on Economic Challenges as areas where Hong Kong had a competitive edge, and they were first made known to the public in the Chief Executive’s 2009-10 Policy Address. They are Medical services, Education services, Cultural and creative industries, Innovation and technology, Testing and certification services, and Environmental industries. The coverage of the Six Industries is presented in the feature article “The Situation of the Six Industries in Hong Kong in 2008 and 2009” in the February 2011 issue of the *Hong Kong Monthly Digest of Statistics*.

<sup>7</sup> Analyses were performed from an “occupation” angle, covering only personnel engaged in IT-related occupation in different industry groups. They were different from analyses performed on other strategic sectors which were conducted from an “industry” angle like the IT&IS sector, which cover all persons working in the sector, including both the IT occupations (such as system managers and analyst programmers) and non-IT occupations (such as clerks and service workers).

11. 四十個行業類別的詳情載於附件一。如附件一所示，各經濟行業分類為MG1至MG12。某些經濟行業會因應其重要性和相關策略性行業有否相同的部分，而把有關行業進一步細分為主要行業類別。現舉一例，「銀行」屬策略性行業「金融服務」內的其中一部分，標示為SS2.1；它同時也屬於經濟行業「金融服務」內的其中一部分，標示為MG9.1。基於這個框架，我們可按十二個經濟行業進行宏觀層面分析，或按二十八個主要行業類別進行較詳細的分析，以找出增長重點的行業和正在萎縮的行業。

11. The 40 industry groups are listed in detail in **Annex 1**. As revealed in **Annex 1**, the economic sectors are labelled from MG1 to MG12. Certain economic sectors will have further breakdowns as major industry groups in view of its economic importance and accommodation of the same components in the relevant strategic sectors. For instance, “**Banking**” is one of the components in strategic sector “**Financial services**” and is labelled SS2.1. It is also one of the components in the economic sector “**Financial services**” as labelled MG9.1. With such framework, macro level analyses can be performed by the 12 MGs (or economic sectors) or at a slightly detailed level by the 28 major industry groups for identifying growth spots and shrinking industries.

## (乙) 進行人力需求的量化推算

12. 按主要行業類別及策略性行業（六項優勢產業除外，見第19至23段）劃分的二零一八年人力需求推算由統計處通過二原的方法編製，這包括（一）根據過往時間數列而編製的二零一八年人力需求量化推算，其主要目的是釐定未來的趨勢方向（即升或降），而非找出任何短期的波動；以及（二）對通過廣泛諮詢持份者和內部的桌上研究所收集得的資料作質量分析，以微調量化推算所得的增長率。

13. 「二零一八年人力資源推算工作小組」採用二零一零年為這輪人力資源推算工作的基準年。不過，由於四大支柱行業的二零一零年數據要待至二零一二年年初才備妥而有所滯後，因此其基準年的估計數字是依據二零零九年的相關數字編製。基於同樣的原因，六項優勢產業的基準年定為二零零九年。

## (B) *Performing quantitative projection of MRP*

12. MRP2018 by major industry group and strategic sector (excluding the Six Industries, see para. 19-23 below) has been worked out by C&SD through a two-pronged approach. This comprises (i) quantitative projection of MRP to 2018 based on historical time series, with the main purpose of underpinning the future direction of trends (i.e. up or down) rather than to identify any short-term fluctuation; and (ii) qualitative analysis of information gathered through extensive consultations with the stakeholders and desktop research performed in-house so as to fine-tune the growth rates derived from the quantitative projection.

13. The WG on MP2018 has adopted 2010 as the base year for this round of MP. There is however time lag on the availability of data for the Four Pillar Industries, where the 2010 figures would not be available until early 2012. The base year estimates have thus been compiled by using the relevant data of 2009. For similar reasons, 2009 has been adopted as the base year for the Six Industries.

14. 除「資訊科技人員」的數據主要是根據職業訓練局進行的人力統計調查結果編製而成外，用作推算主要行業類別及策略性行業的量化推算的過往數列來源均採用「就業綜合估計數字」<sup>8</sup>。

15. 統計處在整理相關的「就業綜合估計數字」的數據（涵蓋期一般由二零零零年至二零一零年）後，便進行統計預測模型的擬合工作。我們把不同模型族如線性、拋物線、對數線性和倒數線性等的模型與過往數列進行擬合。經過統計評估後，從各種擬合統計模型中，選定部分模型作深入研究。以下是一些值得留意的要點：

- (一) 由於部分的主要行業類別於某些年份的時間序列出現突兀或無規律的變化，因此根據過往數列而制定的統計模型不適合預測未來。在這種情況下，較近期的數列會用作趨勢分析，以外推法得出將來的增長率；以及

14. Regarding the sources of historical data for the work of quantitative projection, the Composite Employment Estimates (CEE)<sup>8</sup> has been used for all the major industry groups and strategic sectors, except for IT personnel where the data are based primarily on the results of the manpower surveys of the Vocational Training Council (VTC).

15. After collating the relevant CEE data which generally cover the period from 2000 to 2010, the statistical forecasting model-fitting work has been performed. Models in different families, such as linear, parabola, log linear and reciprocal linear, are fitted to the historical data series. Among the fitted statistical models, some are selected for intensive study after statistical evaluations. The following may be worth noting :

- (a) For some major industry groups where there are abrupt or erratic changes in the time series in some years, the statistical model based on the intended historical series does not fit well into the future. In such cases, the more recent data series are used for trend analysis in extrapolating the future growth rate; and

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<sup>8</sup> 統計處在編製「就業綜合估計數字」時，參考了從各類統計調查結果而編製成的就業統計數字，目的是提供一套理想的按行業類別劃分的本地整體就業數字作一般應用。進一步資料可參閱二零一一年九月號《香港統計月刊》內的專題文章「二零一零年就業綜合估計數字」。

<sup>8</sup> The CEE are compiled by the C&SD with reference to different sets of employment figures compiled from the results of different surveys with an aim to provide an optimal set of territory-wide employment figures by industry group for general application. Further information on CEE can be found in the feature article “Composite Employment Estimates 2010” published in the September 2011 issue of the *Hong Kong Monthly Digest of Statistics*.

(二) 在某些極端情況下，並沒有明顯的趨勢可以確認，較近期的按年平均增長率便會被採用為外推法的基礎。

(b) In extreme cases where no apparent trend can be identified, the average annual growth rate of historical data in recent years are adopted as the basis of extrapolation.

從擬合統計模型中得出的按年平均增長率，應用於相應的主要行業類別及策略性行業（六項優勢產業除外）的基準年數字，便可編製二零一八年的人力需求推算。

The average annual growth rates obtained from the fitted model are then applied to the base year figures of the respective major industry group and strategic sector (excluding the Six Industries) to obtain the projected manpower requirement in 2018.



**(丙) 就通過廣泛諮詢和桌上研究  
所收集得來的資料進行質量  
分析**

16. 為主要行業類別和策略性行業（六項優勢產業除外）進行的諮詢業界工作是為了收集持份者（包括商會、行業組織、各行業翹楚、學術界、公共機構和相關政府決策局／部門）對未來增長情景的見解，以補充相應的統計推算。他們的意見在經濟逆轉時尤其重要，並對識別新的機會和挑戰具決定性作用。

17. 統計處早前成立了一個由專業職系人員組成的諮詢小組，並對所有主要行業類別和策略性行業（六項優勢產業除外）中約六十個目標機構進行諮詢訪問。所收集的資料連同桌上研究的結果，用作調校統計預測模型得出的推算增長率。

18. 編製推算數字時亦參考了反映最新就業分布情況變化的相關就業統計數字，如由勞工及福利局進行的《二零一零年人力及工作技能需求機構單位統計調查》的初步結果，以及由職業訓練局出版的相關人力統計調查結果。

**(C) *Performing qualitative analysis of  
information gathered through  
extensive consultations and desktop  
research***

16. The objective of the consultation exercise related to the major industry groups and strategic sectors (excluding the Six Industries) is to collate information from stakeholders among trade associations, chambers of commerce, leading companies in specific industries, academics, public organisations and relevant government B/Ds on the growth scenarios to supplement the respective statistical projections. Their views are particularly important at the time of changes and are critical to identify new opportunities and challenges.

17. A consultation team comprising professional officers had been formed within C&SD. Consultation interviews with some 60 targeted organisations across all of the major industry groups and strategic sectors (excluding the Six Industries) had been conducted. Information obtained therein, together with the desktop research findings, has been used to refine the projected growth rates derived from the statistical forecasting models.

18. Reference has also been made to the latest short-term changes of employment distribution as reflected in the relevant employment statistics, such as the preliminary results of the “2010 Establishment Survey on Manpower and Job Skills Requirements” of LWB and the results of relevant manpower surveys published by the VTC at the time of compiling the projection.

19. 至於六項優勢產業方面，由於缺乏過往數列及其涵蓋範圍仍在變化，統計預測模型擬合的方法不能應用，因此必須識別一個合適方法以估計各產業的推算按年平均增長率。此外，六項優勢產業的推算期亦因而縮短至二零一五年。

20. 統計處進行的研究顯示，德爾菲法可加以應用，以達到是次研究的目的。簡單而言，德爾菲法包括邀請專家小組內的專家以匿名的方式提供有關研究主題的意見，並經多重反饋的問卷以達致專家意見的共識。關於這方法的詳細描述可參閱附件二。

21. 由於六項優勢產業的性質和所涉及的經濟活動各有不同，因此每項產業均成立了各自的專家小組，這樣才能充分取得專家在個別範疇的知識和意見。因此，一共成立了六個專家小組。專家小組成員經有關政府決策局／部門提名並獲邀加入。經邀請後，共有七十四位專家答應參加。

19. Due to the absence of historical data series and their evolving scope, the statistical forecasting model-fitting approach cannot be applied to the Six Industries and an appropriate method has to be identified to estimate the projected average annual growth rate for each of them. Furthermore, the projection period for the Six Industries is shortened to 2015.

20. The study undertaken by C&SD revealed that the Delphi method could be applied to meet the objectives. In brief, the Delphi method involves inviting a panel of experts to provide their expert views on the topic under study anonymously through a multiple-iteration of questionnaires in order to develop a consensus of opinions among the experts. A more detailed description of the method is given in **Annex 2**.

21. In view of the very different nature and economic activities covered in each of the Six Industries, an expert group is set up for each of the industry so as to fully tap the knowledge and views of the experts in particular fields. Hence, a total of six expert groups have been formed. The relevant government B/Ds have also been approached for the suggested experts to be recruited into the expert groups. Upon invitation, consent of 74 experts has subsequently been obtained.

22. 統計處向專家進行總共三輪的數據收集。在整項研究過程中，統計處保留了德爾菲法的四個主要特性，即專家匿名、定期反饋、小組回應的統計摘要和重複的組織性資料流程。在每輪數據收集後，本處就各個產業的推算按年平均增長率擬備統計摘要及專家的匿名意見摘要。這些資料會在下一輪的問卷內註明並寄給專家，以便他們對有關產業在指定推算期的按年平均增長率作進一步的判斷及調整。

23. 把上述研究結果得出的各項優勢產業的推算按年平均增長率應用於相應的基準年數字，便可編製六項優勢產業至二零一五年的人力需求推算。這些數字會因應最新的統計數字以及相關政府決策局的政策假設而作出微調。

22. A total of three rounds of data collection from the experts had been conducted. Throughout the study, the four key features of Delphi method, namely, anonymity of experts, regular feedback, statistical summary of group responses and iteration with structured information flow, had been maintained. After each round of data collection, summary statistics on the projected average annual growth rates of each Industry and anonymous summary of collated comments from the experts had been prepared. These materials had been incorporated into the questionnaire and sent to the experts in the following round of data collection so as to facilitate their judgement on any further adjustment to the average annual growth rate of the respective Industry for the specified projection period.

23. MRP to 2015 for each of the Six Industries is compiled by applying the projected average annual growth rate of each Industry derived from the study results to the corresponding base year figures. These figures may be fine-tuned having regarded to updated statistics and policy assumptions of relevant government bureaux.

**(丁) 對按主要行業類別及策略性行業劃分的二零一八年人力需求推算及按六項優勢產業劃分的二零一五年人力需求推算的結果進行評核**

24. 二零一八年人力需求推算跨部門專責小組，由統計處人員出任主席，成員包括「二零一八年人力資源推算工作小組」的成員及統計處的有關人員，負責審議和認可二零一八年按主要行業類別及策略性行業劃分的人力需求推算及按六項優勢產業劃分的二零一五年人力需求推算的結果。

25. 專責小組通過在一連串的會議，經審慎考慮後，認可了各種基本假設，連同統計模型和諮詢業界及桌上研究得出影響各行業增長的因素和推算結果。

26. 獲認可的推算結果（見以下**第III部分**）隨後提供予勞工及福利局，作進一步編製按職業類別和教育程度劃分的人力需求數字，亦即二零一八年人力資源推算的人力需求推算。

**(D) Evaluating the results of MRP by major industry group and strategic sector to 2018 and for the Six Industries to 2015**

24. An inter-departmental Task Group on Manpower Requirement Projection to 2018 (TGMRP2018) with the chair from C&SD, and members of the WG on MP2018 as well as relevant subject officers of C&SD to serve as members, has been formed to deliberate and endorse the results of MRP by major industry group and strategic sector to 2018 and for the Six Industries to 2015.

25. The underlying assumptions, together with the statistical models and the factors affecting the growth of the industries obtained in the consultation exercise and desktop research as well as the projection results, have been carefully considered and then endorsed in a series of meetings.

26. The endorsed projection results (see **Section III** that follows) are subsequently provided to LWB for further compilation of manpower requirement in terms of occupation group and educational attainment level so as to form the requirement side of MP2018.

### III. 推算結果

#### (甲) 整體人力需求增長

27. 整體人力需求，即涵蓋受僱的居港人口但不包括外籍家庭傭工，預計會在中期持續增長，從二零一零年的328萬人增至二零一八年的360萬人，淨增長311 800人，即由二零一零年至二零一八年間按年平均增長率為1.1%。這主要由於：

- (一) 不同經濟領域的增長，如金融服務、專業服務及旅遊業；
- (二) 資訊科技及電子商貿在本港經濟的進一步發展；
- (三) 全球金融海嘯後的經濟復蘇；以及
- (四) 大型基建及發展計劃的推行。

值得注意的是，人力需求推算是獨立於人力供應方面的推算增長。

#### (乙) 按經濟行業劃分的分析

28. 按經濟行業劃分至二零一八年的人力需求推算結果（即十二個經濟行業）載於表一、圖一及圖二。

### III. Projection results

#### (A) Overall growth of manpower requirement

27. The overall manpower requirement, covering employed Hong Kong Resident Population but excluding foreign domestic helpers, is projected to grow over the medium term, from 3.28 million in 2010 to 3.60 million in 2018, representing a net increase of 311 800 persons or an average annual growth rate of 1.1% between 2010 and 2018. This is mainly attributable to :

- (a) Growth in various facets of the economy, such as financial services, professional services and tourism;
- (b) Further development of information technology and e-commerce in the economy;
- (c) Economic recovery from the global financial tsunami; and
- (d) Implementation of large-scale infrastructure and development projects.

It should be noted that the MRP is compiled independent of the projected growth on the manpower supply side.

#### (B) Analysis by economic sector

28. Results of MRP2018 by economic sector (i.e. 12 MGs) are shown in **Table 1, Charts 1 and 2**.

表一 二零一零年至二零一八年按經濟行業劃分的人力需求  
Table 1 Manpower requirement by economic sector, 2010-2018

經濟行業 Economic sector	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010		
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	人數 Number	變動 百分率 % change	按年平均增長率 Average annual growth rate (%)
<b>第一產業</b> <b>Primary sector</b>							
MG1 農業、漁業及採石 Agriculture, fishing and quarrying	3 700	0.1	3 000	0.1	-700	-19.0	-2.6
<i>小計</i> <i>Sub-total</i>	<i>3 700</i>	<i>0.1</i>	<i>3 000</i>	<i>0.1</i>	<i>-700</i>	<i>-19.0</i>	<i>-2.6</i>
<b>第二產業</b> <b>Secondary sector</b>							
MG2 製造 Manufacturing	121 000	3.7	94 100	2.6	-27 000	-22.3	-3.1
MG3 電力、燃氣和自來水供應及 廢棄物管理 Electricity, gas and water supply, and waste management	15 200	0.5	17 100	0.5	1 900	12.6	1.5
MG4 建造 Construction	271 100	8.3	315 200	8.8	44 100	16.3	1.9
<i>小計</i> <i>Sub-total</i>	<i>407 300</i>	<i>12.4</i>	<i>426 400</i>	<i>11.9</i>	<i>19 000</i>	<i>4.7</i>	<i>0.6</i>

表一 二零一零年至二零一八年按經濟行業劃分的人力需求（續）  
Table 1 Manpower requirement by economic sector, 2010-2018 (cont'd)

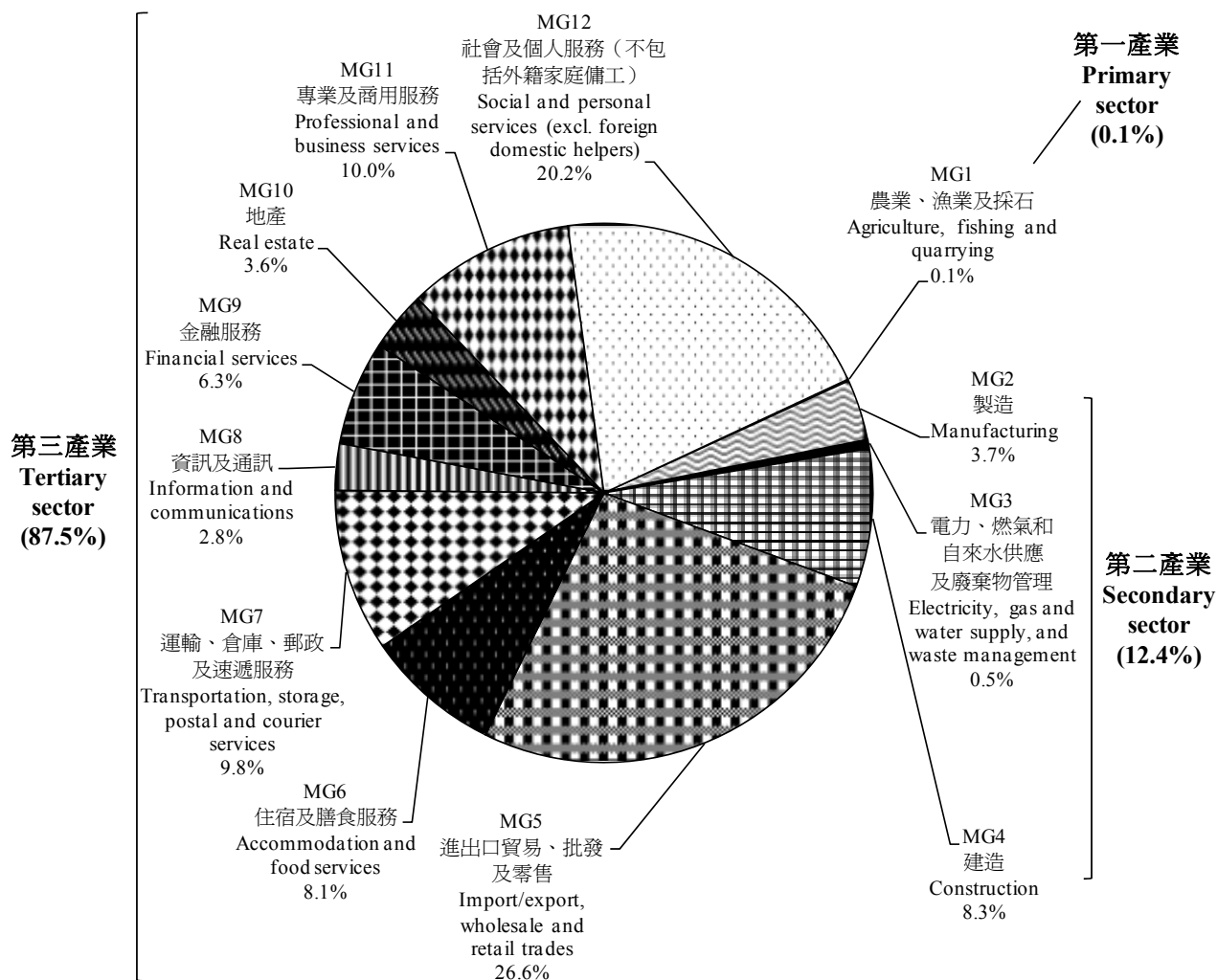
經濟行業 Economic sector	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010		
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	人數 Number	變動 百分率 % change	按年平均增長率 Average annual growth rate (%)
<b>第三產業</b> <b>Tertiary sector</b>							
MG5 進出口貿易、批發及零售 Import/export, wholesale and retail trades	874 000	26.6	921 800	25.6	47 700	5.5	0.7
MG6 住宿及膳食服務 Accommodation and food services	265 400	8.1	295 300	8.2	29 900	11.3	1.3
MG7 運輸、倉庫、郵政及速遞服 務 Transportation, storage, postal and courier services	321 300	9.8	345 800	9.6	24 500	7.6	0.9
MG8 資訊及通訊 Information and communications	92 900	2.8	108 100	3.0	15 200	16.4	1.9
MG9 金融服務 Financial services	207 000	6.3	253 100	7.0	46 200	22.3	2.5
MG10 地產 Real estate	119 000	3.6	135 100	3.8	16 100	13.5	1.6
MG11 專業及商用服務 Professional and business services	329 000	10.0	370 100	10.3	41 200	12.5	1.5
MG12 社會及個人服務（不包括外 籍家庭傭工） Social and personal services (excl. foreign domestic helpers)	665 000	20.2	737 600	20.5	72 700	10.9	1.3
<b>小計</b> <b>Sub-total</b>	<b>2 873 500</b>	<b>87.5</b>	<b>3 167 000</b>	<b>88.1</b>	<b>293 500</b>	<b>10.2</b>	<b>1.2</b>
<b>所有經濟行業<sup>φ</sup></b> <b>Total in the economy</b>	<b>3 284 600</b>	<b>100.0</b>	<b>3 596 400</b>	<b>100.0</b>	<b>311 800</b>	<b>9.5</b>	<b>1.1</b>

註釋：數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。  
Notes: Figures are rounded to the nearest 100 and may not add up to total due to rounding.

<sup>φ</sup> 不包括外籍家庭傭工。  
Excluding foreign domestic helpers.

圖一 二零一零年按經濟行業劃分的實際就業人數分布

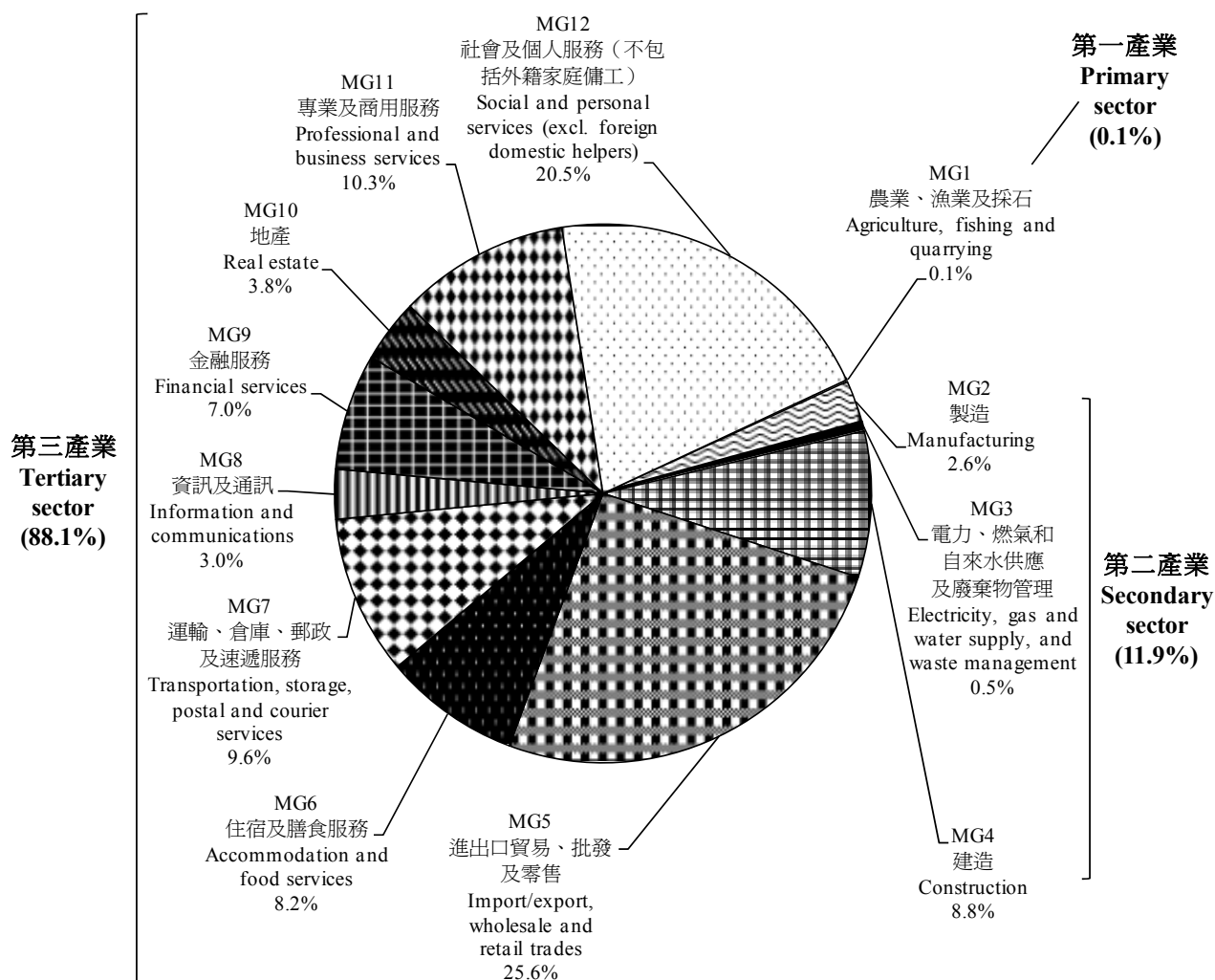
Chart 1 Distribution of actual employment by economic sector, 2010





圖二 二零一八年按經濟行業劃分的人力需求推算分布

Chart 2 Distribution of projected manpower requirement by economic sector, 2018



29. 按經濟行業劃分的分項數字顯示，第三產業（或服務性行業）將構成中期人力需求增長的主要來源，其就業人數佔總就業人力需求的百分比推算由二零一零年的87.5%（287萬人）升至二零一八年的88.1%（317萬人），即淨增加293 500人。增長的主要原因是香港的經濟結構正持續轉型至知識型和以服務為本的經濟體系。

30. 服務性行業中，「**進出口貿易、批發及零售**」預計將繼續佔人力需求最大比重（佔二零一八年的25.6%），其二零一八年的人力需求推算是921 800人。緊隨其後是「**社會及個人服務（不包括外籍家庭傭工）**」（737 600人，佔二零一八年的20.5%）、和「**專業及商用服務**」（370 100人，佔10.3%）。事實上，所有服務性行業於二零一零至二零一八年期間的推算都是正增長。

31. 在推算期內人力需求的人數淨增長方面，排前三名的行業是「**社會及個人服務（不包括外籍家庭傭工）**」（72 700人）、「**進出口貿易、批發及零售**」（47 700人）及「**金融服務**」（46 200人）。

29. Breakdown by economic sector indicates that the tertiary sector, or the service sectors as a whole, will constitute the major source of growth in manpower requirement over the medium term, with its share in the total manpower requirement projected to rise further from 87.5% (2.87 million) in 2010 to 88.1% (3.17 million) in 2018, representing a net increase of 293 500 persons. This is mainly due to the continuous re-structuring of our economy towards knowledge-based and service-oriented.

30. Within the service sectors, the “**Import/export, wholesale and retail trades**” is expected to continue to take up the largest share of manpower requirement over the medium term (25.6% in 2018), with the manpower requirement projected at 921 800 in 2018. This is followed by the “**Social and personal services (excl. foreign domestic helpers)**” (20.5%, 737 600 in 2018); and the “**Professional and business services**” (10.3%, 370 100). In fact, all the service sectors are projected to have positive growth during the period 2010-2018.

31. In terms of net increase in number of manpower requirement for the projection period, the top three sectors are “**Social and personal services (excl. foreign domestic helpers)**” (72 700), “**Import/ export, wholesale and retail trades**” (47 700) and “**Financial services**” (46 200).

32. 至於第二產業方面，就業人數的百分比將由二零一零年的12.4%縮小至二零一八年的11.9%。這主要是由於「**製造**」將會從二零一零年佔整體的3.7%（121 000人），進一步萎縮至二零一八年的2.6%（94 100人）。然而，第二產業的人力需求總數推算有淨增長19 000人，主要是由於「**建造**」的人力需求將從二零一零年的271 100人（佔整體人力需求的8.3%）增至二零一八年的315 200人（佔整體人力需求的8.8%）。「**電力、燃氣和自來水供應及廢棄物管理**」的人力需求推算會有溫和的增長，人數將會由二零一零年的15 200人增至二零一八年的17 100人（即增加了1 900人），而佔整體就業人力需求的百分比則保持不變（0.5%）。

33. 第一產業（在香港屬於人數較少的行業）所佔的比率在二零一八年的推算中將會保持在約0.1%的水平。然而，隨着香港進一步城市化，從事第一產業的工人人數將有所減少。

34. 以增長率的排序而言，「**金融服務**」的人力需求推算增長率最高，二零一零年至二零一八年期間的按年平均增長率為2.5%（由二零一零年的207 000人增至二零一八年的253 100人）。這很大程度上是由於以下的發展：

(一) 中國內地的持續經濟增長將會為香港的金融服務行業提供巨大的商機，特別是與資產和基金管理以及首次公開招股有關的業務；

32. For the secondary sector, the share of employment will dwindle from 12.4% in 2010 to 11.9% in 2018. This is mainly attributable to the further contraction in the share of the “**Manufacturing**” sector, from 3.7% (121 000) in 2010 to 2.6% (94 100) in 2018. Nevertheless, the total number of manpower requirement in the secondary sector is projected to have a net increase of 19 000, mainly due to the increase in manpower requirement in the “**Construction**” sector, from 271 100 (accounted for 8.3% of the overall manpower requirement) in 2010 to 315 200 (accounted for 8.8% of the overall manpower requirement) in 2018. There is moderate growth in the projected manpower requirement in “**Electricity, gas and water supply, and waste management**”, from 15 200 in 2010 to 17 100 in 2018 (+1 900), with the percentage share in the overall manpower requirement maintained unchanged at 0.5%.

33. The share of the primary sector, which is a small sector in Hong Kong, is projected to stay at around 0.1% up to 2018, with some decrease in the number of workers along with further urbanisation of Hong Kong.

34. Ranked in terms of growth rate, “**Financial services**” is projected to have the fastest growth rate in manpower requirement, at an average annual growth rate of 2.5% during the period 2010-2018 (from 207 000 in 2010 to 253 100 in 2018). This is largely supported by the following developments :

(a) The sustained economic growth in the mainland of China will provide the financial services sector in Hong Kong with enormous business opportunities, especially businesses related to asset and fund management and Initial Public Offering (IPO) of stocks;

- (二) 香港將繼續強化其作為供內地作境外投資平台的角色，如境外人民幣業務，而相關的資金流入將有利本港金融市場的買賣；
- (三) 新的人民幣業務和產品類別，如人民幣單位信託基金、債券、期貨及期權市場已經或將會在香港推出。這些業務和產品將會吸引資金流入香港股票和債券市場，並增加這些買賣所需的經紀服務及人力需求；以及
- (四) 如「十二五規劃」所強調，香港將力爭利用其現有優勢，以進一步發展其國際金融中心的地位。
- (b) Hong Kong will continue to strengthen its role as a platform for the Mainland to invest offshore, i.e. offshore Renminbi (RMB) business, and the related capital flows towards Hong Kong would enhance transactions in the financial market;
- (c) New categories of RMB businesses and products, e.g. RMB unit trust, bonds, futures and options markets, have been/will be launched in Hong Kong. These will attract capital inflow into Hong Kong stock and bond market and enhance manpower demand in brokerage services for those transactions; and
- (d) As highlighted in the 12<sup>th</sup> five-year plan, Hong Kong will strive to make the best of its existing edge to further develop its status as an international financial centre.

請亦參考下文第54段。

See also para. 54 below.

35. 以總人力需求的推算增長率計算而言，排第二高位的是「資訊及通訊」，二零一零年至二零一八年期間的人力需求推算按年平均增長率為1.9%（由二零一零年的92 900人增至二零一八年的108 100人），主要是由於：

35. “*Information and communications*” ranked second in terms of the projected growth rate of its total manpower requirement. The manpower requirement in the sector is projected to increase at an average annual growth rate of 1.9% during the period 2010-2018 (from 92 900 in 2010 to 108 100 in 2018), attributable largely to :

- (一) 手機程式日益受歡迎，電子銀行和電子零售的應用亦日趨普及；以及
- (a) Increasing popularity of Apps for mobile phones and more prominent applications in e-banking and e-retailing; and

(二) 商務智能(如客戶資料分析和客戶投資組合管理)和客戶關係管理服務的重要性日益提高,因而對業務分析員的需求更形殷切。

(b) High demand for business analysts in the areas of business intelligence (e.g. profiling of customers and management of portfolios of clients) and customer relationship management.

36. 同樣位列第二高位的是「**建造**」,二零一零年至二零一八年期間的人力需求推算按年平均增長率為1.9%(由二零一零年的271 100人增至二零一八年的315 200人)。預期在推算期內推出的數個大型基建和發展項目<sup>9</sup>,有關保持公共和私人樓宇的穩定供應的政策,以及公眾對現有建築物保養的日益關注,將會引致更大的人力需求。

36. Also ranked second is the “**Construction**” sector, which is projected to grow at an average annual growth rate of 1.9% during 2010-2018 (from 271 100 in 2010 to 315 200 in 2018). The rolling-out of several large-scale infrastructural and development projects<sup>9</sup> over the projection period, the policy to maintain a stable provision of public and private buildings as well as the growing concern on the maintenance of existing buildings are expected to give rise to higher manpower requirement.

<sup>9</sup> 這些項目包括：例如港鐵南港島線、沙田至中環鐵路線、屯門至赤鱗角連接路及屯門西繞道、廣深港高速鐵路香港段、港珠澳大橋、深港機場連接鐵路研究、落馬洲河套區研究、西九文化區、啓德發展計劃、新界東北新發展區及洪水橋新發展區。

<sup>9</sup> The projects include, for example, the South Island Line of Hong Kong Mass Transit Railway, Sha Tin to Central Link, Tuen Mun-Chek Lap Kok Link and Tuen Mun Western Bypass, Hong Kong section of the Guangzhou-Shenzhen-Hong Kong Express Rail Link, Hong Kong-Zhuhai-Macao Bridge, rail connection between the Hong Kong and Shenzhen airports, Lok Ma Chau Loop, West Kowloon Cultural District (WKCD), Kai Tak Development, North East New Territories (NENT) New Development Areas (NDAs) and Hung Shui Kiu NDA.

37. 至於「地產」方面，二零一零年至二零一八年期間的人力需求推算按年平均增長率為1.6%（由二零一零年的119 000人增至二零一八年的135 100人），是十二個經濟行業中排第三高位的。由於政府的目標是保持足夠的土地供應予房地產市場，以協助房地產的穩定發展及令地產代理的數目增加，因此這個行業預期會繼續增長。香港住宅存量的上升趨勢，以及對優質物業管理服務的需求不斷增加，亦是這個行業的人力需求增加的原因。

37. Regarding “*Real estate*”, manpower requirement is projected to grow at an average annual growth rate of 1.6% during 2010-2018 (from 119 000 in 2010 to 135 100 in 2018), the third fastest among the 12 economic sectors. The sector is expected to continue to grow as the Government aims to ensure our adequate land supply for the property market, facilitating a steady and stable property market development and leading to an increasing number of property agencies. The growing trend of housing stocks in Hong Kong and the increasing demand for quality service in property management also call for increase in manpower requirement in the sector.

38. 其後是「專業及商用服務」。二零一零年至二零一八年期間，這個行業的人力需求推算按年平均增長率為1.5%（由二零一零年的329 000人增至二零一八年的370 100人）。這是由於其屬下的主要行業類別如「法律服務」（按年平均增長率為3.1%）和「會計、核數及簿記服務」（每年2.6%）的高增長所致。隨着中國內地持續的經濟發展及香港作為國際金融中心的地位進一步強化，預計有關首次公開招股、法律諮詢和國際仲裁的服務需求將會增多，而其他專業服務的需求也預期會相應增長，如「其他與建造及地產活動無關的工程及技術服務、商業管理及顧問服務」<sup>10</sup>（每年2.0%）。

39. 二零一零年至二零一八年期間的「住宿及膳食服務」<sup>11</sup>的人力需求推算按年平均增長率為1.3%（由二零一零年的265 400人增至二零一八年的295 300人）。這主要因入境旅遊的蓬勃發展所致。

38. Following is the “*Professional and business services*”, whose manpower requirement is projected to grow at an average annual growth rate of 1.5% during 2010-2018 (from 329 000 in 2010 to 370 100 in 2018). This is attributed to the high growth in a number of major industry groups within the sector, such as “Legal services” (an average growth rate of 3.1% per annum) and “Accounting, auditing and bookkeeping services” (2.6% per annum). Followed by the sustained economic development in the mainland of China and the strengthening of Hong Kong’s position as an international financial centre, it is anticipated that there will be more demands for services related to IPO of stocks, legal advice and international arbitrations. The demand for other professional services such as “Engineering and technical services not related to construction and real estate activities, business management and consultancy services”<sup>10</sup> (2.0% per annum) is also expected to grow correspondingly.

39. Manpower requirement for “*Accommodation and food services*”<sup>11</sup> is projected to grow at 1.3% on average per annum during 2010-2018 (from 265 400 in 2010 to 295 300 in 2018). This will mainly be due to the booming of inbound tourism.

<sup>10</sup> 「其他與建造及地產活動無關的工程及技術服務、商業管理及顧問服務」包括商業管理及顧問活動；技術測試及分析；與建造及地產活動無關的工程、技術及顧問服務；科學研究及發展；獸醫活動和攝影活動。

<sup>11</sup> 「住宿服務」包括酒店、賓館、旅舍及其他提供短期住宿服務的機構單位。

<sup>10</sup> “Engineering and technical services not related to construction and real estate activities, business management and consultancy services” includes business management and consultancy activities; technical testing and analysis; engineering, technical and consultancy services not related to construction and real estate activities; scientific research and development; veterinary activities and photographic activities.

<sup>11</sup> “Accommodation services”, i.e. mainly covered hotels, guesthouses, boarding houses and other establishments providing short term accommodation.

40. 至於「**社會及個人服務（不包括外籍家庭傭工）**」方面，二零一零年至二零一八年期間的人力需求推算按年平均增長率為1.3%（由二零一零年的665 000人增至二零一八年的737 600人）。這行業內的多項活動的人力需求推算也有所增加，包括教育、藝術、娛樂及康樂，以及各種個人服務，如美容服務、理髮服務、鐘錶及珠寶修理等。至於教育服務方面，主要導致人力需求增加的原因是專上教育的擴展和新的「三三四學制」對高等教育的實施，以及政府推出多項提高本港作為地區教育樞紐地位的措施。其他服務方面，預期會受惠於政府和相關機構所推行的娛樂、藝術及文化措施，如西九文化區的發展及「個人遊」計劃。

41. 在二零一零年至二零一八年期間，「**運輸、倉庫、郵政及速遞服務**」的人力需求推算按年平均增長率為0.9%（由二零一零年的321 300人增至二零一八年的345 800人）。雖然內地港口進一步發展令直接與內地進行採購和安排貨物附運日益流行，從而影響了本港的貨運服務，但是香港在航空運輸服務的競爭優勢，交通運輸網絡和基建的持續改善，以及源自泛珠江三角洲地區的需求，將仍會為這個行業的整體人力需求提供增長的動力。

40. Regarding “**Social and personal services (excl. foreign domestic helpers)**”, manpower requirement is projected to grow at an average annual growth rate of 1.3% during 2010-2018 (from 665 000 in 2010 to 737 600 in 2018). A wide spectrum of activities within this sector are projected to have an increase in manpower requirement, including education, arts, entertainment and recreation, and various personal services such as beauty services, hairdressing treatment and repair of watches, clocks and jewellery. For education services, the major contributing factors are expansion of the post-secondary education sector, the implementation of the new “3-3-4” academic structure on tertiary education as well as the rolling out of measures by the government to enhance Hong Kong’s status as a regional education hub. As for the other services, they are expected to be benefited from the range of entertainment, arts and cultural initiatives contemplated by the government and relevant organisations, notably the development of West Kowloon Cultural District as well as the Individual Visit Scheme.

41. Manpower requirement for “**Transportation, storage, postal and courier services**” is projected to grow at an average annual growth rate of 0.9% during 2010-2018 (from 321 300 in 2010 to 345 800 in 2018). While the increasing direct sourcing and shipment from/to the Mainland with further development of Mainland’s ports will have impact on our freight transportation services, the competitive edges of Hong Kong’s air transport services, the continuous improvement in transportation network and infrastructure as well as the demand originating from the Pan-Pearl River Delta region will still provide growth momentum to the manpower requirement of the sector as a whole.



42. 「進出口貿易、批發及零售」的人力需求推算相對上會有較慢的增長，二零一零年至二零一八年期間的人力需求推算按年平均增長率為0.7%（由二零一零年的874 000人增至二零一八年的921 800人），主要是由於以下的因素所致：

- (一) 屬下的主要行業類別「進出口貿易」的人力需求推算（+20 500人）會隨着源自內地的離岸貿易增長及利便貿易的基建有所改善而增長。不過，香港作為轉口中介的角色將或會褪色；
- (二) 另一個主要行業類別「零售」將進一步擴大（+36 000人），這是由於「個人遊」計劃擴充到其他內地城市，加上人民幣升值，致使與旅遊業相關的行業受益；以及
- (三) 由於全球化有利廠家在價格上作出比較和直接接觸生產商，因此買家繞過批發商直接與製造商採購產品的趨勢正不斷增加。這個現象預料將會持續，以致主要行業類別「批發」的人力需求將會下降（-8 800人）。

42. “*Import/export, wholesale and retail trades*” is projected to have a relatively slower growth in manpower requirement, at an average annual growth rate of 0.7% during 2010-2018 (from 874 000 in 2010 to 921 800 in 2018), mainly attributed to the mixed effect of the following factors :

- (a) Manpower requirement in major industry group “Import and export trade” (+20 500) is projected to grow alongside the growth in offshore trade originating from the Mainland and improvement in infrastructure that facilitates trades but Hong Kong’s role as an intermediary for re-export will be diminishing;
- (b) Extension of the Individual Visit Scheme to other Mainland cities as well as the appreciation of RMB, which will benefit the tourism-related industries, will bring along further expansion in another major industry group “Retail trade” (+36 000); and
- (c) As a result of globalisation, which has facilitated price comparison and direct contact with the manufacturers, there is an increasing trend of buyers by-passing wholesalers to source products on their own. This phenomenon is expected to continue, and will lead to a decrease in manpower requirement in major industry group “Wholesale” (-8 800).

43. 「農業、漁業及採石」及「電力、燃氣和自來水供應及廢棄物管理」的就業人數相對較少。雖然「農業、漁業及採石」在二零一八年的人力需求推算對比起二零一零年有所減少，但是預計涉及的工人數目較少（約700人）。另一方面，「電力、燃氣和自來水供應及廢棄物管理」（由二零一零年的15 200人增至二零一八年的17 100人）的人力需求推算將輕微增加，以致整個經濟行業的總人力需求將會淨增加約1 900人。

44. 「製造」的人力需求推算將持續萎縮，於二零一零年至二零一八年期間的按年平均率為-3.1%（由二零一零年的121 000人減至二零一八年的94 100人）。這主要是由於：

- (一) 高生產成本和勞工短缺等因素將會持續。更多僱主會把工廠遷入內地或其他低生產成本的地區生產；
- (二) 香港製造業逐漸轉型至生產高檔產品，如醫療產品和健康食品。由於有關的生產過程普遍使用較高科技及需要較少人手，因此人力需求減少；
- (三) 在未來數年，隨着科技的發展和進步，傳統製造業的人力需求會逐漸減少；以及
- (四) 由於國內人力本地化，因此內地對香港管理人員的需求將會進一步減少。

43. Employment size of “*Agriculture, fishing and quarrying*” and “*Electricity, gas and water supply, and waste management*” are relatively small. While decreases in manpower requirement are projected in “*Agriculture, fishing and quarrying*” in 2018 over 2010, the number of workers involved are expected to be small (about 700). On the other hand, slight increase is projected in “*Electricity, gas and water supply, and waste management*” (from 15 200 in 2010 to 17 100 in 2018), leading to a net increase of about 1 900 in the total manpower requirement of this sector.

44. Manpower requirement in “*Manufacturing*” is projected to shrink continuously, at an average annual rate of -3.1% during 2010-2018 (from 121 000 in 2010 to 94 100 in 2018). This is largely attributable to the following factors :

- (a) High production cost and labour shortage will continue to persist. More employers will shift their plants to the Mainland or other low cost regions for production;
- (b) The transformation of Hong Kong manufacturing industry towards production of high-end products, such as medical and health food products, will reduce manpower demand since the related production processes are generally more high-tech and less labour intensive;
- (c) The traditional manufacturing activities will also become less labour intensive in the years ahead along with technological development and advancement; and
- (d) The demand for management staff from Hong Kong to work in the Mainland will further decrease due to localisation.

### (丙) 按主要行業類別劃分的分析

45. 十二個經濟行業可再進一步細分為二十八個主要行業類別，作詳細的分支行業分析。以人數計算，獲推算增長最高的十個主要行業類別載於表二。除「建造」外，其餘都屬服務性行業。值得注意的是，增長人數最多的四個行業類別合計約佔最高的十大主要行業類別的人力需求推算增長的一半。

46. 以人數計算增長高的行業並不一定是增長率最高的行業。以推算按年平均增長率排序最高的十個主要行業類別載於表三，當中大多與知識或專業服務有較密切的連繫，如「法律服務」(+3.1%)、「資訊科技相關服務」(+3.0%)及「金融機構（銀行及保險除外）」<sup>12</sup> (+2.8%)。

### (C) Analysis by major industry group

45. Analysed by detailed sub-sectors, the 12 economic sectors can be further broken down into 28 major industry groups. The top ten major industry groups with the highest projected increase in manpower requirement are shown in **Table 2**. All except “Construction” belong to service industries. Specifically, the top four major industry groups taken together accounting for about half of the projected increase in the manpower requirement of the top ten major industry groups.

46. The high growth industries in terms of absolute number are not necessarily those with the fastest growth rate. Ranked by projected average annual growth rate, as revealed in the top ten major industry groups in **Table 3**, majority of them have a high knowledge or professional content, such as “Legal services” (+3.1%), “Information technology related services” (+3.0%), and “Financial institutions (other than banks and insurance)”<sup>12</sup> (+2.8%).

<sup>12</sup> 「金融機構（銀行及保險除外）」包括貨幣管理機構；投資及控股公司；信託、基金及相關金融工具和其他金融服務活動；金融保險服務輔助活動，如股票交易及投資銀行活動。

<sup>12</sup> “Financial institutions (other than banks and insurance)” include Monetary authorities; investment and holding companies; trusts, funds and similar financial entities and other financial service activities; activities auxiliary to financial service and insurance activities such as stock exchange and investment banking activities.

表二 二零一零年至二零一八年人力需求增長人數最高的十個主要行業類別  
 Table 2 Top ten major industry groups with the highest growth in number of manpower requirement, 2010-2018

次序 Rank	主要行業類別 Major industry group	二零一零年 實際就業人數 Actual employment in 2010	二零一八年 人力需求推算 Projected manpower requirement in 2018	二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010	
		人數 Number  (a)	人數 Number  (b)	人數 Number  (c) = (b) - (a)	所佔總計 百分比 % share to total  (d)
1	MG12.2 社會及個人服務(人類保健活動除外)(不包括外籍家庭傭工) Social and personal services (other than human health activities) (excl. foreign domestic helpers)	555 100	605 900	50 800	19.2
2	MG4 建造 Construction	271 100	315 200	44 100	16.7
3	MG5.3 零售 Retail trade	305 900	341 900	36 000	13.6
4	MG12.1 人類保健活動 Human health activities	109 800	131 700	21 900	8.3
5	MG9.1 銀行 Banking	91 500	113 200	21 700	8.2
6	MG6.2 膳食服務 Food services	224 300	244 800	20 500	7.8
7	MG5.1 進出口貿易 Import and export trade	503 400	523 900	20 500	7.7
8	MG9.2 金融機構(銀行及保險除外) Financial institutions (other than banks and insurance)	71 800	89 500	17 700	6.7
9	MG10 地產 Real estate	119 000	135 100	16 100	6.1
10	MG7.2 雜項運輸服務 Miscellaneous transportation services	128 800	144 000	15 200	5.7
	<b>總計 Total</b>	<b>2 380 800</b>	<b>2 645 300</b>	<b>264 500</b>	<b>100.0</b>

註釋： 數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。  
 Note: Figures are rounded to the nearest 100 and may not add up to total due to rounding.

表三 二零一零年至二零一八年人力需求增長率最高的十個主要行業類別  
 Table 3 Top ten major industry groups with the fastest projected growth rate in manpower requirement, 2010-2018

次序 Rank	主要行業類別 Major industry group	二零一零年 實際就業人數 Actual employment in 2010	二零一八年 人力需求推算 Projected manpower requirement in 2018	二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010
		人數 Number	人數 Number	按年平均增長率 Average annual growth rate (%)
1	MG11.1 法律服務 Legal services	20 500	26 100	3.1
2	MG8.2 資訊科技相關服務 Information technology related services	35 100	44 500	3.0
3	MG9.2 金融機構（銀行及保險除外） Financial institutions (other than banks and insurance)	71 800	89 500	2.8
4	MG9.1 銀行 Banking	91 500	113 200	2.7
5	MG6.1 住宿服務 Accommodation services	41 100	50 500	2.6
6	MG11.2 會計、核數及簿記服務 Accounting, auditing and bookkeeping services	26 800	32 900	2.6
7	MG7.3 貨倉及倉庫服務 Warehousing and storage	6 400	7 800	2.5
8	MG12.1 人類保健活動 Human health activities	109 800	131 700	2.3
9	MG11.3 其他與建造及地產活動無關的 工程及技術服務、商業管理及 顧問服務 Engineering and technical services not related to construction and real estate activities, business management and consultancy services	48 300	56 600	2.0
10	MG4 建造 Construction	271 100	315 200	1.9
	<b>總計 Total</b>	<b>722 400</b>	<b>868 100</b>	<b>2.3</b>

註釋： 數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。  
 Note: Figures are rounded to the nearest 100 and may not add up to total due to rounding.

47. 至於在人力需求方面萎縮的行業，「製造」的推算人力需求將繼續收縮（-27 000人），其次是「批發」（-8 800人）和「郵政及速遞」（-2 300人）。首兩個主要行業類別的人數下降因素已在第44和42（三）段提述，而「郵政及速遞」的推算人數下降，則主要是由於行業內的競爭日趨激烈，致使以更具成本效益的模式營運的公司將可取得較大的市場佔有率。按人力需求推算跌幅最大的三個主要行業類別載於**表四**。

48. 以下降率計算，排第一位的是「製造」（-3.1%），其次是「農業、漁業及採石」（-2.6%）和「批發」（-1.8%）。「農業、漁業及採石」在香港一直是人數較少的主要行業類別。該行業的人力需求將進一步減少，主要是由於香港在過去數十年不斷城市化，以及該行業的現有工人將陸續退休。由於在基準年的就業人數相對較少，所以下降率較為顯著。按人力需求推算下降率最大的三個主要行業類別載於**表五**。

49. 二十八個主要行業類別的推算結果列於**附件三**。

47. Regarding the industries with shrinking manpower requirement, projected manpower requirement in “Manufacturing” will continue to contract (-27 000), followed by “Wholesale” (-8 800) and “Postal and courier” (-2 300). Whilst the factors attributed to the decline of the first two major industry groups have been highlighted in para. 44 and 42(c) above, the projected decline in “Postal and courier” is mainly due to the increasing competition within the industry such that firms with more cost-effective means in running the business can take up a larger share of the market. The top three major industry groups with the largest decline in projected manpower requirement are presented in **Table 4**.

48. In terms of the fastest rate of decline, “Manufacturing” ranked the first (-3.1%), followed by “Agriculture, fishing and quarrying” (-2.6%) and “Wholesale” (-1.8%). The “Agriculture, fishing and quarrying” has all the time been a small major industry group in Hong Kong. Further decrease in manpower requirement in this sector is mainly due to the continuous urbanisation in the past decades and retirement of the existing workers. The apparent declining rate is due to the small number of employment at the base year. The top three major industry groups with the largest rate of decline in projected manpower requirement are shown in **Table 5**.

49. The projection results of the 28 major industry groups are presented in **Annex 3**.

表四 二零一零年至二零一八年人力需求下跌人數最多的三個主要行業類別  
**Table 4 Top three major industry groups with the largest decline in manpower requirement, 2010-2018**

次序 Rank	主要行業類別 Major industry group	二零一零年 實際就業人數 Actual employment in 2010	二零一八年 人力需求推算 Projected manpower requirement in 2018	二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010
		人數 Number (a)	人數 Number (b)	人數 Number (c) = (b) - (a)
1	MG2 製造 Manufacturing	121 000	94 100	-27 000
2	MG5.2 批發 Wholesale	64 700	56 000	-8 800
3	MG7.4 郵政及速遞 Postal and courier	18 300	15 900	-2 300

註釋： 數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。  
 Note: Figures are rounded to the nearest 100 and may not add up to total due to rounding.

表五 二零一零年至二零一八年人力需求下降率最大的三個主要行業類別  
**Table 5 Top three major industry groups with the largest rate of decline in manpower requirement, 2010-2018**

次序 Rank	主要行業類別 Major industry group	二零一零年 實際就業人數 Actual employment in 2010	二零一八年 人力需求推算 Projected manpower requirement in 2018	二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010
		人數 Number	人數 Number	按年平均下降率 Average annual rate of decline (%)
1	MG2 製造 Manufacturing	121 000	94 100	-3.1
2	MG1 農業、漁業及採石 Agriculture, fishing and quarrying	3 700	3 000	-2.6
3	MG5.2 批發 Wholesale	64 700	56 000	-1.8

註釋： 數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。  
 Note: Figures are rounded to the nearest 100 and may not add up to total due to rounding.

(丁) 按策略性行業（六項優勢產業除外）劃分的分析

50. 策略性行業有以下兩點值得注意：

- (一) 各策略性行業之間並不是互不重疊的(即是一些行業類別是會同時被涵蓋在多於一個策略性行業)，如「資訊科技相關服務」同時被涵蓋在「資訊科技及資訊服務」和「專業服務」行業內。因此，策略性行業的總數不能簡單地將個別策略性行業的數字相加起來便可得出；以及
- (二) 入境旅遊的人力需求是把旅遊比率(根據來自旅客的收益佔總業務收益的百分比而計算出來)應用於有關行業類別的就業數字而編製出來的。

51. 從下面的表六可見，二零一八年按策略性行業（六項優勢產業除外）劃分的人力需求推算結果顯示，二零一零年至二零一八年期間「資訊科技及資訊服務」、「資訊科技人員」、「金融服務」、「專業服務」及「旅遊業」的人力需求的推算增長速度（每年高於2.0%），均較本地的整體人力需求的推算增長速度（1.1%）為快；然而，「貿易及物流」的推算人力需求增長會較整體的速度慢（0.3%）。因此，四大支柱行業整體按年預計在推算期內會以平均每年1.4%的比率增長，而人力需求佔總就業人數的百分比推算由二零一零年的44.3%（1 453 800人）上升至二零一八年的45.3%（1 629 600人）。

(D) Analysis by strategic sector (excluding the Six Industries)

50. The following two points on the strategic sectors may be worth noting :

- (a) The strategic sectors are not mutually exclusive where some industry groups exist in common, e.g. “*Information technology related services*” appears in both “*IT&IS*” and “*Professional services*” sectors. Hence, the figures for individual strategic sectors cannot be simply added up to arrive at the total; and
- (b) Manpower requirement for inbound tourism is compiled by applying the tourism ratios, which are estimated by the shares of the business receipts from visitors in total business receipts, to the employment figures of the relevant industry groups.

51. As revealed in **Table 6** that follows, results of MRP2018 by strategic sector (excluding the Six Industries) indicate that manpower requirements in “*IT&IS*”, “*IT personnel*”, “*Financial services*”, “*Professional services*” and “*Tourism*” are all projected to grow at a faster pace (more than 2.0% per annum) than the overall manpower requirement in the economy (1.1%) during 2010-2018, while the projected manpower requirements for “*Trading and logistics*” (0.3%) is slower than the overall pace. As a result, the Four Pillar Industries taken together are projected to grow at an average annual growth rate of 1.4% over the projection period, with percentage share of total employment projected to increase from 44.3% (1 453 800) in 2010 to 45.3% (1 629 600) in 2018.



表六 二零一零年至二零一八年按策略性行業（六項優勢產業除外）劃分的人力需求  
Table 6 Manpower requirement by strategic sector (excluding the Six Industries), 2010-2018

策略性行業 Strategic sector	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010		
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	人數 Number	變動 百分率 % change	按年平均增長率 Average annual growth rate (%)
資訊科技及資訊服務 ** Information technology and information services							
SS1 資訊科技及資訊服務行業 ^ IT&IS sector	54 600	1.7	64 600	1.8	10 000	18.3	2.1
資訊科技人員 + IT personnel	73 400	2.2	92 200	2.6	18 800	25.6	2.9
<b>四大支柱行業 Ψ Four Pillar Industries</b>							
SS2 金融服務 Financial services	207 000	6.3	253 100	7.0	46 200	22.3	2.5
SS3 貿易及物流 Trading and logistics	760 600	23.2	781 700	21.7	21 100	2.8	0.3
SS4 專業服務 Professional services	288 700	8.8	347 400	9.7	58 700	20.3	2.3
SS5 旅遊業 Tourism	197 500	6.0	247 400	6.9	49 900	25.3	2.9
<b>小計 Sub-total</b>	<b>1 453 800</b>	<b>44.3</b>	<b>1 629 600</b>	<b>45.3</b>	<b>175 900</b>	<b>12.1</b>	<b>1.4</b>
<b>所有經濟行業 φ Total in the economy</b>	<b>3 284 600</b>	<b>100.0</b>	<b>3 596 400</b>	<b>100.0</b>	<b>311 800</b>	<b>9.5</b>	<b>1.1</b>

註釋：數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。

Notes: Figures are rounded to the nearest 100 and may not add up to total due to rounding.

\*\* 「資訊科技及資訊服務」的分析是從行業角度進行，而「資訊科技人員」的分析則從職業角度進行。

Analyses are performed from an "industry" angle covering the IT&IS industry sector and also from an "occupation" angle for the IT personnel.

^ 「資訊科技及資訊服務」行業的人力需求包括「資訊科技及資訊服務」機構的所有員工，除「資訊科技人員」以外，亦包括從事其他職業的人員。

Manpower requirement in the IT&IS industry sector includes all persons working in IT&IS companies. Apart from IT personnel, persons engaged in other occupations are also included.

+ 資訊科技人員包括所有行業機構單位內從事與資訊科技有關的職業的人員。有關統計數字以職業訓練局有關的人力統計調查結果為基礎。

IT personnel include persons engaged in IT related occupations in establishments of all industries. Statistics on IT personnel are based on the results of a related manpower survey conducted by the Vocational Training Council.

Ψ 由於進行推算時，四大支柱行業的二零一零年數字還未備妥，因此使用了參照二零零九年的相關數字編製而成的估計數字。

As figures of the Four Pillar Industries for 2010 were not yet available at the time when the projection was performed, estimates compiled using the relevant data in 2009 were used.

φ 不包括外籍家庭傭工。

Excluding foreign domestic helpers.

## 資訊科技及資訊服務行業和資訊科技人員

52. 策略性行業「**資訊科技及資訊服務**」在香港已有相當的發展。「**資訊科技及資訊服務**」是由「**軟件出版及電訊活動**」和「**資訊科技相關服務**」組成。這策略性行業的人力需求推算將由二零一零年的54 600人（佔總就業人數的1.7%）增至二零一八年的64 600人（佔1.8%），按年平均增長率為2.1%。資訊科技相關服務的人力需求增長預計比電訊服務快，是由於：

- (一) 鑑於資訊及通訊科技在工商業的普及程度相對較低，資訊科技相關服務仍存在發展空間；
- (二) 行業將持續地從低增值的領域（如數據輸入）向高增值的領域（如智能手機和平板電腦應用軟件的開發）發展；以及
- (三) 數碼娛樂、知識管理、數據保安／私隱和流動資訊處理的需求日益增長。

## IT&IS sector and IT personnel

52. The “**Information technology and information services**” strategic sector in Hong Kong is quite well developed. It is composed of “Software publishing and telecommunication activities”, and “Information technology related services”. Manpower requirement in this sector is projected to increase from 54 600 (1.7% of the total employment) in 2010 to 64 600 (1.8%) in 2018, or at an average annual growth rate of 2.1%. It is expected that the manpower requirement for IT related services will grow faster than that for telecommunication services, due to :

- (a) There will still be room for expansion in IT related services in view of the relatively low penetration rate of Information and Communication Technologies (ICT) in business;
- (b) There is continual move from low value-added areas such as data entry to high value-added areas such as development of software applications for smartphones and tablet computers; and
- (c) Increasing demand for digital entertainment, knowledge management, data security/privacy and mobile computing.

53. 另一方面，「**資訊科技人員**」包括向廣泛的主要行業類別提供必需支援的資訊科技人員。他們受僱於與資訊科技服務相關的公司或與資訊科技服務不相關的公司內的資訊科技部門。資訊科技人員的人力需求將由二零一零年的73 400人（佔總就業人數的2.2%），推算上升至二零一八年的92 200人（佔2.6%），按年平均增長率為2.9%。預期人力需求上升主要是來自「**資訊及通訊**」（4.5%）及「**金融服務、地產、專業及商用服務**」（3.3%）。

### 四大支柱行業

54. 策略性行業「**金融服務**」與經濟行業中的「**金融服務**」的涵蓋範圍完全相同，在過去幾十年不斷壯大。金融服務的人力需求由二零一零年的207 000人（佔總就業人數的6.3%）推算上升至二零一八年的253 100人（佔7.0%），按年平均增長率為2.5%。在這策略性行業內，「**金融機構（銀行及保險除外）**」的人力需求推算增長最為顯著（按年平均增長率為2.8%）（另見上文第34段）。

53. On the other hand, “**IT personnel**” consists of those providing essential support to a wide range of major industry groups. They are employed either in IT service-related firms or in the in-house IT departments of companies in non-IT service-related industries. Manpower requirement for IT personnel is projected to rise from 73 400 (2.2% of the total employment) in 2010 to 92 200 (2.6%) in 2018, or at an average annual growth rate of 2.9%. The increase in this demand is expected to come mainly from the “**Information and communications**” (4.5%), and the “**Financial services, real estate, professional and business services**” (3.3%).

### The Four Pillar Industries

54. The “**Financial services**” strategic sector, which is exactly the same as that of the economic sector, has grown from strength to strength over the past decades. Manpower requirement in this sector is projected to increase from 207 000 (6.3% of the total employment) in 2010 to 253 100 (7.0%) in 2018, or at an average annual growth rate of 2.5%. Within the sector, manpower requirement for “**Financial institutions (other than banks and insurance)**” is projected to grow most notably (at an average annual growth rate of 2.8%) (see also para. 34 above).

55. 策略性行業「貿易及物流」由八個分支行業<sup>13</sup>組成。這策略性行業的人力需求將由二零一零年的760 600人(佔總就業人數的23.2%)推算上升至二零一八年的781 700人(佔21.7%)，按年平均增長率為0.3%。以下幾點值得注意：

- (一) 「貿易」的人力需求將於二零一零年至二零一八年期間以0.3%的按年平均增長率上升，而「物流」將以0.6%增長；
- (二) 由於內地市場日趨開放和內地港口、機場及電子貿易持續發展，因此可預期直接與內地進行採購和安排貨物附運會日益流行；
- (三) 香港的中介角色會逐漸褪色，因而對批發、轉口貿易和部分貨運服務的增長會產生不利影響；

55. The “*Trading and logistics*” strategic sector is composed of eight sub-sectors<sup>13</sup>. Manpower requirement in this sector is projected to increase from 760 600 (23.2% of total employment) in 2010 to 781 700 (21.7%) in 2018, or by an average annual growth rate of 0.3%. The following points may be worth noting :

- (a) “Trading” will increase at an average annual growth rate of 0.3% in manpower requirement during 2010-2018, while “logistics” will grow at 0.6%;
- (b) It is envisaged that direct sourcing and shipment from/to the Mainland will be increasingly popular with the continuous liberalisation of the Mainland’s market and development of Mainland’s ports, airports and e-trading;
- (c) The intermediary role of Hong Kong will be gradually diminished and consequently this will adversely affect the growth in wholesale, re-export trade and some freight transportation services;

<sup>13</sup> 策略性行業「貿易及物流」的分支行業包括「進出口貿易」、「批發」、「陸路貨運」、「水上貨運」、「航空貨運」、「其他貨運相關服務」、「貨倉及倉庫服務」及「郵政及速遞」。

<sup>13</sup> The sub-sectors of the “Trading and logistics” strategic sector are “Import and export trade”, “Wholesale”, “Land freight transport”, “Water freight transport”, “Air freight transport”, “Other freight-related transportation services”, “Warehousing and storage”, and “Postal and courier”.

- (四) 因全球金融海嘯而產生的保護主義可能令貿易行業產生結構性的轉變，過去數年經歷的增長可能在未來難以持續；以及
- (五) 由於內地企業仍會利用香港的國際聯繫進入國際市場，因此離岸貿易的實質增長可能會抵消上述的影響。特別是空運業，即使是面對國內機場的不斷挑戰，但由於貨物速運服務的需求正不斷上升，而香港在航空網絡、航班密度和營運成本較低這幾方面仍然有競爭優勢，因此預期仍會有較佳的業務前景。
- (d) Protectionism resulted from the global financial tsunami might have caused structural changes in the trading industry to the effect that growth experienced in the past years might not be sustainable in the future; and
- (e) The above-said impact may be offset by the solid growth of offshore trade since Mainland enterprises will still utilise Hong Kong's international connections to enter the international markets. In particular, air freight transport will have better business prospect despite increasing challenges from the Mainland's airports as there is a growing need of prompt cargo forwarding services and Hong Kong still has comparable advantages in aviation network, flight frequency and lower operation cost.

56. 策略性行業「專業服務」為企業發展提供廣泛的必要服務<sup>14</sup>。專業服務的人力需求將由二零一零年的288 700人(佔總就業人數的8.8%)推算上升至二零一八年的347 400人(佔9.7%)，按年平均增長率為2.3%。在這個策略性行業內，預計人力需求增長較高的主要行業是(一)法律服務、(二)會計、核數及簿記服務、以及(三)資訊科技相關服務。因內地經濟和其金融市場持續增長，將增加對兩個行業的服務需求，有利它們的發展。另一方面，後者由於電子商務和數碼娛樂日益普及而受惠。政府按照《內地與香港關於建立更緊密經貿關係的安排》下持續努力協助各專業服務進軍內地市場，是令這策略性行業出現推算增長的另一個因素。

56. The “*Professional services*” strategic sector<sup>14</sup> provides a wide range of essential services for the conduct of business. Manpower requirement in professional services sector is projected to increase from 288 700 (8.8% of the total employment) in 2010 to 347 400 (9.7%) in 2018, or by an average annual growth rate of 2.3%. Within the sector, greater growth in manpower requirement is expected for (i) Legal services; (ii) Accounting, auditing and bookkeeping services; and (iii) Information technology related services. The former two industries will be benefited from the increasing demand for such services from the Mainland enterprises as generated by the sustained economic growth in the Mainland and its financial market. The latter will, on the other hand, grow along with the increasing popularity of e-commerce and digital entertainment. The continuous effort of the government in assisting various professional services to gain access to the Mainland market under Closer Economic Partnership Arrangement (CEPA) is another contributing factor to the projected growth of this strategic sector.

<sup>14</sup> 策略性行業「專業服務」包括「資訊科技相關服務」、「法律服務」、「會計、核數及簿記服務」、「其他與建造及地產活動無關的工程及技術服務、商業管理及顧問服務」、「設計、廣告及相關服務」、「與建造及地產相關的建築、測量及工程服務」及「人類保健活動」。

<sup>14</sup> The “Professional services” strategic sector includes “Information technology related services”, “Legal services”, “Accounting, auditing and bookkeeping services”, “Engineering and technical services not related to construction and real estate activities, business management and consultancy services”, “Design, advertising and related services”, “Architectural, surveying and engineering services related to construction and real estate” and “Human health activities”.

57. 香港是亞太區最受歡迎的旅遊地點之一。「旅遊業」活動包括主要為旅客提供服務的界別，例如住宿、旅行代理及機票代理、入境及外訪過境客運，以及同時服務旅客及本地消費者的界別如零售、餐飲、以及其他客運及個人服務。

58. 旅遊業的人力需求將由二零一零年的197 500人（佔總就業人數的6.0%）推算上升至二零一八年的247 400人（佔6.9%），即按年平均增長率為2.9%。因應會議、獎勵、商務和展覽旅遊的發展，旅遊景點的優化，「個人遊」計劃擴展到其他內地城市，加上基建的改善，訪港旅客預計在中期將有進一步增長。值得注意的是，在二零一八年入境旅遊的人力需求的推算增長（217 100人）高於外訪旅遊（30 300人）。

57. Hong Kong is one of the most popular tourist destinations in the Asia Pacific region. “Tourism” activities embrace those segments providing services mainly to visitors, like accommodation, travel agents and airline tickets agents, inbound and outbound cross-boundary passenger transport as well as those segments serving both visitors and local consumers, like the retail trade, restaurants, and other passenger transport and personal services.

58. Manpower requirement for tourism is projected to increase from 197 500 (6.0% of the total employment) in 2010 to 247 400 (6.9%) in 2018, representing an average annual increase of 2.9% over the period. Incoming visitors are expected to have further growth in the medium term, consequential to the development of Meetings, Incentives, Conventions and Exhibitions (MICE) tourism, enhancement in tourism attractions, extension of the Individual Visit Scheme to other Mainland’s cities and the improvement in infrastructure. It should be noted that the projected growth in manpower requirement for inbound tourism (217 100) in 2018 exceeds that for outbound tourism (30 300).

## (戊) 按六項優勢產業劃分的分析

59. 由於缺乏過往數列及其涵蓋範圍仍在變化，因此「六項優勢產業」只推算至二零一五年，並採用德爾菲法向專家搜集資料，從而得出個別六項優勢產業的推算按年平均增長率。下列是一些要點：

- (一) 由於這項研究是以收集各產業的整體推算增長率為目的，因此並沒有收集各產業內更詳細的資料；
- (二) 在每輪數據收集中，每個專家小組內的專家獲邀提供在穩定經濟情況下（正常估計）、經濟衰退情況下（保守估計）及經濟蓬勃情況下（樂觀估計）的人力需求推算按年平均增長率，然後按不同的經濟情況，編製出推算按年平均增長率；以及
- (三) 六項優勢產業的總人力需求純粹是個別產業人力數字的總和。值得注意的是，這些產業之間的人力需求會有些微的重疊。

## (E) Analysis by Six Industries

59. For the “Six Industries”, the projection period is up to 2015 due to the absence of historical data series and their evolving scope. The Delphi method has been used to collect information from the experts so as to derive the projected average annual growth rate for each of the Six Industries. It should however be noted that :

- (a) As the objective of the study is to obtain information on the projected growth rate of each Industry as a whole, more detailed information within each Industry has not been collected;
- (b) The experts in the specific expert groups were invited to provide the projected average annual growth rate of the manpower requirement under stable economic environment (or General Estimate), economic downturn (or Pessimistic Estimate) and economic upturn (or Optimistic Estimate) in each round of data collection. Projected average annual growth rates are then compiled for different economic situations; and
- (c) The total manpower requirements of the Six Industries are only a simple summation of the manpower figures for individual Industries. It should be noted that there is some, though insignificant, overlapping of manpower requirements between these Industries.



60. 從下列**表七**可見，有關的推算結果顯示，在二零零九年至二零一五年期間，六項優勢產業的總人力需求呈正面增長（按年平均增長率為2.8%），較四大支柱行業（由二零一零年至二零一八年為1.4%）和整體經濟（由二零一零年至二零一八年為1.1%）的為高。六項優勢產業佔總就業人數的百分比推算由二零零九年的11.3%（395 000人）升至二零一五年的12.4%（465 600人）。

60. As revealed in **Table 7** below, the projection results indicate that total manpower requirement of all the Six Industries will show a positive direction during 2009-2015 (increase at an average annual growth rate of 2.8%), which is higher than that of the Four Pillar Industries (1.4% from 2010 to 2018) and the overall economy (1.1% from 2010 to 2018). The percentage share of employment is projected to increase from 11.3% (395 000) in 2009 to 12.4% (465 600) in 2015.

表七 二零零九年至二零一五年按策略性行業（六項優勢產業）劃分的人力需求  
Table 7 Manpower requirement by strategic sector (the Six Industries), 2009-2015

策略性行業 Strategic Sector	二零零九年 實際就業人數 Actual employment in 2009		二零一五年 人力需求推算 Projected manpower requirement in 2015		二零一五年與二零零九年 比較的變動情況 Change in 2015 over 2009		
	人數 Number	所佔 百分比 <sup>0</sup> % share	人數 <sup>∞</sup> Number	所佔 百分比 <sup>0</sup> % share	人數 Number	變動 百分率 % change	按年平均增長率 Average annual growth rate (%)
<b>六項優勢產業</b> <b>Six Industries</b>							
SS6.1 醫療產業 Medical services	72 000	2.1	86 000	2.3	14 000	19.4	3.0
SS6.2 教育產業 Education services	62 200	1.8	80 600	2.1	18 400	29.5	4.4
SS6.3 文化及創意產業 Cultural and creative industries	188 300	5.4	207 100	5.5	18 800	10.0	1.6
SS6.4 創新科技產業 Innovation and technology	27 500	0.8	35 800	0.9	8 300	30.2	4.5
SS6.5 檢測及認證產業 Testing and certification services	12 600	0.4	14 500	0.4	1 800	14.6	2.3
SS6.6 環保產業 Environmental industries	32 400	0.9	41 700	1.1	9 300	28.7	4.3
<b>小計</b> <b>Sub-total</b>	<b>395 000</b>	<b>11.3</b>	<b>465 600</b>	<b>12.4</b>	<b>70 600</b>	<b>17.9</b>	<b>2.8</b>
<b>所有經濟行業</b> <b>Total in the economy</b>	<b>3 486 900</b>		<b>3 768 200</b>				

註釋：推算按年平均增長率是使用德爾菲法的研究結果計算出來。

Notes: The projected average annual growth rates are derived from the results of the study using the Delphi method.

數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。

Figures are rounded to the nearest 100 and may not add up to total due to rounding.

<sup>0</sup> 為了與刊載於《香港統計月刊》二零一一年二月號內的專題文章「香港六項優勢產業在二零零八年及二零零九年的情況」的數字一致，「所佔百分比」是指各個行業的就業人數佔總就業人數（包括外籍家庭傭工）的百分比。

Figures refer to the percentage share of employment of each industry to the total employment with figures of foreign domestic helpers (FDHs) included so as to be consistent with the figures published in the feature article "The Situation of the Six Industries in Hong Kong in 2008 and 2009" in the February 2011 issue of the *Hong Kong Monthly Digest of Statistics*.

<sup>∞</sup> 推算數字是根據在穩定經濟環境下（或正常估計）的推算增長率而編製。

Projected figures are compiled based on the projected growth rate under the stable economic environment (or the General Estimate).

61. 「醫療產業」的人力需求將會推算從二零零九年的72 000人（佔總就業人數的2.1%）增加至二零一五年的86 000人（佔2.3%），即按年平均增長率為3.0%。增長主要是由於：

- (一) 維持本地社區的必要服務，特別是為五歲以下的小孩及長者提供的服務；
- (二) 本港人口老化令醫療保健產品及服務的需求增加；
- (三) 內地人民日益增加使用醫療服務及採購藥物；以及
- (四) 中醫的進一步發展。

61. Manpower requirement for “*Medical services*” is projected to increase from 72 000 (2.1% of total employment) in 2009 to 86 000 (2.3%) in 2015, or by an average annual growth rate of 3.0%. Such growth could mainly be attributable to :

- (a) The maintenance of essential service for the local community, particularly for children aged below five and the elderly;
- (b) The ageing of the Hong Kong population, resulting in an increase in demand for products and services on medical and health care;
- (c) The increasing utilisation of medical services and procurement of drugs by people of the Mainland; and
- (d) The further development of Chinese medicine.

62. 隨着香港朝知識型經濟和地區教育樞紐的方向發展，「**教育產業**」的人力需求將會從二零零九年的62 200人（佔總就業人數的1.8%）推算增加至二零一五年的80 600人（佔2.1%），即按年平均增長率為4.4%。需求增長是由於：

- (一) 專上教育的擴充，如新設立的自負盈虧機構，受大學教育資助委員會資助的院校就學位和副學位課程所設立的自負盈虧部門，以及因實施新的「三三四學制」而把學位課程由三年重組為四年；
- (二) 學生和家長對職業教育、學術課程和補習課程的需求正穩步增加；以及
- (三) 非本地學生來港修讀副學位或以上程度的教育課程的人數增加。

62. In line with Hong Kong's development towards a knowledge-based economy and regional education hub, manpower requirement for "**Education services**" is projected to increase from 62 200 (1.8% of total employment) in 2009 to 80 600 (2.1%) in 2015, representing an average annual growth rate of 4.4% over the period. The increasing demand is generated through :

- (a) The expansion of the post-secondary education sector, such as the setting up of new self-financing institutions and the self-financing arms of University Grants Committee-funded institutions for degree and sub-degree programmes, and the restructuring of degree programmes from 3 years to 4 years resulting from the implementation of the new "3-3-4" academic structure;
- (b) The steady increase in demand for vocational education, academic programmes and tutorial courses from students and parents; and
- (c) The increase in number of non-local students coming to Hong Kong for sub-degree or above level education programmes.

63. 與其他五個產業相比，「文化及創意產業」的增長率較低，但以人數的絕對值計算，增長卻是最高的。人力需求會從二零零九年的188 300人（佔總就業人數的5.4%）推算增加至二零一五年的207 100人（佔5.5%），即增加18 800人；按年平均增長率則為1.6%。增長是由於：

63. The growth of “*Cultural and creative industries*” appears to be modest (in terms of growth rate) compared with the other five Industries but ranked first in terms of growth in absolute number of workers. Manpower requirement is projected to increase from 188 300 (5.4% of total employment) in 2009 to 207 100 (5.5%) in 2015, which gives an increase of 18 800, or at an average annual growth rate of 1.6%. The increase is contributed by such activities as :

- |                             |  |
|-----------------------------|--|
| (一) 西九文化區的發展和落成；            | (a) The development and completion of West Kowloon Cultural District;                            |
| (二) 以技術為主導的服務和產品的蓬勃增長；      | (b) Prosperous growth of technology-led services and products;                                   |
| (三) 政府的大型基建項目的發展；           | (c) Development of large-scale infrastructural projects of the government;                       |
| (四) 非政府和私營團體在文化、教育及康體設施的增加； | (d) Increase in cultural, education and health amenities by non-government and private entities; |
| (五) 為發展產品及品牌上的技術設計提供設施；以及   | (e) Availability of facilities for developing technical design of products and brands; and       |
| (六) 數碼地面電視和電台廣播的進一步發展。      | (f) Further development of digital terrestrial television and radio broadcast.                   |

64. 「**創新科技產業**」預料會是六項優勢產業中按年平均增長率最高(4.5%)，人力需求將會由二零零九年的27 500人（佔總就業人數的0.8%）推算增加至二零一五年的35 800人（佔0.9%）。增長可能是由於：

- (一) 香港的發展步入知識型經濟，令研究和開發活動的投資得到支持；
- (二) 對以科技為基礎的產品和服務的需求日增，以及業內激烈的競爭，均有助推動企業通過開展技術創新活動為自身增值；以及
- (三) 政府對創新及科技發展給予支持，無疑為研發活動提供推動力，從而對創造就業產生正面影響。

64. Within the Six Industries, “**Innovation and technology**” is expected to have the largest average annual growth rate (4.5%), with manpower requirement projected to increase from 27 500 (0.8% of total employment) in 2009 to 35 800 (0.9%) in 2015. The increase is likely to arise from :

- (a) The development of Hong Kong into a knowledge-based economy would support the investment in research and development (R&D) activities;
- (b) The growing demand of technology based products and services as well as the keen competition in the business segments, both of which will help drive companies to move up the value-added ladder through conducting more technological innovation activity; and
- (c) The support of Government on innovation and technology development would provide impetus to R&D activities which would have a positive impact on job creation.

65. 「**檢測及認證產業**」的人力需求將會由二零零九年的12 600人（佔總就業人數的0.4%）推算增加至二零一五年的14 500人（佔0.4%），即按年平均增長率為2.3%。這些增長主要由於：

- (一) 社會就產品安全和環境保護引入了更嚴格的標準和評定準則，致使由第三方評定為合格的需求增加，而本港的實驗室已於這方面在國際間建立了信譽和具備競爭優勢；
- (二) 社會上健康意識的提高和醫療服務的發展，引致醫療檢測的需求，以及有關中成藥註冊的檢測需求；
- (三) 隨着大型基建項目和住宅建築物的增加而產生對建造相關的檢測及認證產業的需求；以及
- (四) 中國內地強勁的經濟增長帶來了更多商機。

65. For “**Testing and certification services**”, manpower requirement is projected to increase from 12 600 (0.4% of total employment) in 2009 to 14 500 (0.4%) in 2015, or by an average annual growth rate of 2.3%. Such growth could mainly be accounted for by :

- (a) The introduction of more stringent standards and regulatory requirements regarding product safety and environmental protection, leading to increase in demand for third-party conformity assessment, where Hong Kong laboratories have established credibility internationally and possess edge at this frontier;
- (b) The demand for medical testing arising from enhanced health-consciousness of the community and development of the medical services industry, and demand for testing relating to registration of proprietary Chinese medicine;
- (c) The demand for construction-related testing and certification services arising from major infrastructural projects and increase in building of residential flats; and
- (d) The increase in business opportunities brought forth by the robust economic growth in the mainland of China.

66. 「環保產業」的人力需求將會由二零零九年的32 400人（佔總就業人數的0.9%）推算增加至二零一五年的41 700人（佔1.1%）（按年平均增長率為4.3%）。這增加主要是由於：

- (一) 隨着人口及經濟增長，廢物量亦穩步增長，帶動與廢物相關的貿易的發展；
- (二) 由於各種自然資源的價格上漲和各種環保政策及措施的推出，因此回收材料／產品的需求日益增加，導致環保重點由廢物處理和處置，逐步轉為較為勞工密集的活動如廢物回收及循環再造；以及
- (三) 眾多基建項目的發展，令環境諮詢和監測工作日益增加，以符合現行法例。

67. 策略性行業（包括六項優勢產業）的推算結果載於附件四至五。

66. Manpower requirement for “*Environmental industries*” is projected to increase from 32 400 (0.9% of total employment) in 2009 to 41 700 (1.1%) in 2015 (at an average annual growth rate of 4.3%). The increase is mainly generated by :

- (a) The steady growth in volume of waste along with population increase and economic growth, leading to the development of waste-related trades;
- (b) The gradual shift of focus from waste treatment and disposal to waste recovery and recycling activities, which are more labour intensive, supported by the growing demand for recycled materials/products due to price escalation of various natural resources as well as introduction of green policies and initiatives; and
- (c) The increasing environmental consulting and monitoring work for the development of many infrastructural projects to comply with the current legislation.

67. The projection results of the strategic sectors (including the Six Industries) are presented in **Annexes 4 to 5**.



## (己) 情景研究

### 方法

68. 統計處與勞工及福利局和經濟分析及方便營商處合作，就二零一八年人力需求推算結果（六項優勢產業除外），以整體經濟增長（按本地生產總值的實質增長計算）與總就業增長之間的統計關係作為參考，進行了概括性的情景研究。當中，透過二原方法作估算的人力需求推算結果可以視作基準情況；至於高基準情況及低基準情況中的總人力需求推算，乃假設推算期內實質本地生產總值年均增長率的幅度後，所粗略作出的相應估計。

69. 如上文第59(二)段所述，六項優勢產業專家小組內的專家，獲邀在每輪數據收集時提供在穩定經濟情況下、經濟衰退情況下和經濟蓬勃情況下的人力需求推算按年平均增長率。在各種經濟情況下，六項優勢產業的推算按年平均增長率因而編製成，然後應用於有關基準年的數字，以獲得六項優勢產業的二零一五年人力需求推算。

## (F) Scenario studies

### Methodology

68. In collaboration with LWB and the Economic Analysis and Business Facilitation Unit (EABFU), scenario studies on results of MRP2018 (excluding the Six Industries) have been performed. This is done based on a broad-brush approach by making reference to the statistical relationship between overall economic growth (in terms of real Gross Domestic Product (GDP)) and total employment growth. While the base-case follows the MRP2018 results compiled through a two-pronged approach, the high-case and low-case projections of the total manpower requirements can be crudely estimated in assuming a range of average annual growth rates of real GDP over the projection period.

69. As mentioned in para. 59(b) above, experts of each expert group of the Six Industries had been invited to provide the projected average annual growth rate of the manpower requirement under stable economic environment, economic downturn and economic upturn in each round of data collection. The projected average annual growth rates under each type of economic situation are then compiled for each of the Six Industries and then applied to the relevant base year figures to obtain the MRP for each of the Six Industries for 2015.

## 結果

70. 基於上文第68段提及的研究，與推算按年平均增長率為1.1%的基準情況相比，在低基準情況下所有主要行業類別的推算按年平均增長率是0.4%，而高基準情況則是1.7%。至於在不同情景下按人數計算的二零一八年人力需求推算亦載於下面的表八。

71. 至於六項優勢產業，與正常情況下2.8%的推算按年平均增長率相比，保守情況下的按年平均推算增長率為1.2%，樂觀情況下則為4.3%。

## Results

70. Based on the study mentioned in para. 68 above, the projected average annual growth rate of the low-case scenario for all major industry groups is 0.4%, whilst that for the high-case scenario is 1.7%, compared with 1.1% for the base-case scenario. **Table 8** below also shows the results of MRP2018 under different scenarios in absolute terms.

71. As for the Six Industries, the projected average annual growth rate derived for the pessimistic situation is 1.2% and for the optimistic situation is 4.3% compared with 2.8% under the general situation.

表八 二零一八年人力需求推算的情景研究結果  
Table 8 Results of scenario studies on manpower requirement projection to 2018

	二零一零年 實際就業 人數 Actual employment in 2010		二零一八年人力需求推算 Projected manpower requirement in 2018				
			基準情況 Base-case scenario	低基準情況 Low-case scenario	高基準情況 High-case scenario		
	人數 Number	人數 Number	二零一零年 至二零一八年 按年平均增長率 Average annual growth rate (2010 - 2018) (%)	人數 Number	二零一零年 至二零一八年 按年平均增長率 Average annual growth rate (2010 - 2018) (%)	人數 Number	二零一零年 至二零一八年 按年平均增長率 Average annual growth rate (2010 - 2018) (%)
所有經濟行業 <sup>φ</sup> Total in the economy	3 284 600	3 596 400	1.1	3 379 700	0.4	3 746 300	1.7

註釋：φ 不包括外籍家庭傭工。  
Note: Excluding foreign domestic helpers.

## IV. 注意事項

72. 人力需求推算闡述了香港的中期人力需求的行業結構，在基於某些假設下可能會發生的情況。過往的趨勢、桌上研究的結果、在諮詢過程中從業界（適用於所有主要行業類別及策略性行業，六項優勢產業除外）及使用德爾菲法（用於六項優勢產業）所搜集得到專家對未來經濟前景的意見均已獲充分考慮。但在使用人力需求推算的數字時，應緊記以下的局限：

### (一) 不受限制的人力需求

在二零一八年人力資源推算中的人力供應推算和人力需求推算是基於一個統計推算的框架下進行，兩者各自獨立編製而沒有預定的關聯。這個框架能夠充分反映勞動市場在推算期內的潛在新增職位數目。在闡釋二零一八年人力資源供求差額時，應留意人力需求的推算是按上述不受任何限制的概念進行的。

## IV. Caveats

72. The MRP illustrates what may happen to the sectoral structure of manpower requirement in Hong Kong over the medium term on the basis of assumptions. The historical trends, results of desktop research and views of experts on the future prospects of the economy obtained in the consultation exercise (for all major industry groups and strategic sectors excluding the Six Industries) and the study using the Delphi method (for the Six Industries) have all been taken into consideration. The following limitations should however be borne in mind when using the MRP figures :

### (a) Unconstrained manpower requirements

The statistical projection framework of MSP and MRP in MP2018 has been designed in such a way that there is no pre-determined linkage or interdependence between them, in the sense that the findings of MRP and MSP have been compiled independent of each other. Such a framework is intended to fully reflect the potential job opportunities that are expected to emerge in the labour market during the projection period. The concept of unconstrained manpower requirements in MP2018 is important in interpreting MRB.

## (二) 過往數列

對於主要行業類別及策略性行業(六項優勢產業除外)而言,二零一八年人力需求推算的過往數列來自「就業綜合估計數字」,涵蓋時段由二零零零年至二零一零年。至於六項優勢產業,就業人數是經與相關持份者確定涵蓋範圍後而特別編製的。主要數據來源包括了不同經濟統計調查的結果。因此,在應用這些數字於某些情況前(如直接比較主要行業類別和六項優勢產業的人力需求推算數字),必須考慮這點。

## (三) 統計模型

統計處在進行模型擬合的過程中嘗試了不同的統計模型族。然而,在現實中並不存在一個能完美地擬合真實數列而沒有任何預測誤差的統計模型。所選取的模型只是最能描述過往的基本趨勢。

## (四) 可用的質量資料

在制訂推算假設的過程中,統計處已經參考了專家的意見。然而,對某些行業而言,所搜集得到的行業發展前景的質量資料,只限於較推算期為短的時期。

## (b) Historical data series

For the major industry groups and strategic sectors (excluding the Six Industries), the historical data series used in MRP2018 are the CEE, which cover the period 2000 to 2010. Regarding the Six Industries, the employment figures are specially compiled after the coverage has been defined with the relevant stakeholders. The main data sources cover results of different economic surveys. Hence, due consideration has to be made before applying these figures in such situation as direct comparison between MRP figures on major industry groups and the Six Industries.

## (c) Statistical model

Different families of statistical models are attempted in the process of model fitting. Yet in reality, there does not exist a statistical model which can fit the real data series perfectly without any forecasting errors. The models selected are only those which can best describe the historical underlying trend.

## (d) Qualitative information available

In the course of formulating projection assumptions, expert views are referred to. The qualitative information obtained on the future prospect of certain industries are, however, confined to a period shorter than the projection period.

(五) 使用德爾菲法的研究

由於缺乏過往數列和有關行業的涵蓋範圍仍在變化，因此統計預測模型擬合的方法不能應用於六項優勢產業。基於這個原因，我們使用了德爾菲法，收集每項六項優勢產業的推算按年平均增長率的資料，以取代已制定多年用以編製其他經濟行業的人力需求推算數字的傳統推算方法。與傳統的二原方法比較，德爾菲法只包含質量方面的資料，但在當前六項優勢產業的情況下，仍是一個適當的方法。

(六) 專業判斷

不同專家無可避免地對個別行業的未來前景會持不同的意見。在制訂假設的過程中，工作小組基於當時備有的最佳資料去評估和整合這些專家的意見。不過，鑑於香港經濟瞬息萬變，在推算過程中或須作出主觀判斷，這實屬無可避免的。

(七) 推算期

鑑於數列顯示就業結構變化迅速，推算更長遠的人力需求可能會存在較大幅度的預測誤差。如要將預測期延長至更長的年期，便須要作進一步的研究。

(e) The study using the Delphi method

Due to the absence of historical data series and their evolving scope, the statistical forecasting model-fitting approach cannot be applied to the Six Industries. Instead, the Delphi method is adopted to collect information on the projected average annual growth rates for each of the Six Industries. Whilst the Delphi method is considered appropriate in the current context, it is a qualitative approach compared with the traditional two-pronged approach for compiling the MRP for other economic sectors which has been established for years.

(f) Professional judgement

It is inevitable that different experts will have different views on the future prospect of individual industries. In the course of formulating assumptions, professional judgement is made based on the best information available to assess and integrate these views. However, given the dynamic nature of the Hong Kong economy, it should be recognised that an element of subjective judgement in the work processes of the projection is unavoidable.

(g) Projection period

In view of the rapid changes in employment structure as the data series revealed, projection of manpower requirement into the more distant future is likely to be subject to a wider margin of forecasting error. Further study has to be done if it is necessary to extend the forecasting period to a much longer horizon.

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# 附 件

## **Annexes**

二零一八年人力需求推算：主要行業類別及策略性行業的涵蓋範圍  
**Coverage of major industry groups and strategic sectors for  
manpower requirement projection to 2018**

I. 主要行業類別（根據「香港標準行業分類2.0版」）

**Major Industry Groups (according to HSIC Version 2.0)**

MG1	農業、漁業及採石 Agriculture, fishing and quarrying
MG2	製造 Manufacturing
MG3	電力、燃氣和自來水供應及廢棄物管理 Electricity, gas and water supply, and waste management
MG4	建造 Construction
MG5	進出口貿易、批發及零售 Import/export, wholesale and retail trades
MG5.1	進出口貿易 Import and export trade
MG5.2	批發 Wholesale
MG5.3	零售 Retail trade
MG6	住宿及膳食服務 Accommodation and food services
MG6.1	住宿服務 Accommodation services
MG6.2	膳食服務 Food services
MG7	運輸、倉庫、郵政及速遞服務 Transportation, storage, postal and courier services
MG7.1	貨運服務 Freight transportation
MG7.2	雜項運輸服務 Miscellaneous transportation services
MG7.3	貨倉及倉庫服務 Warehousing and storage
MG7.4	郵政及速遞 Postal and courier



MG8	資訊及通訊 Information and communications
MG8.1	軟件出版及電訊活動 Software publishing and telecommunication activities
MG8.2	資訊科技相關服務 Information technology related services
MG8.3	資訊及通訊相關雜項活動 Miscellaneous activities related to information and communications
MG9	金融服務 Financial services
MG9.1	銀行 Banking
MG9.2	金融機構（銀行及保險除外） Financial institutions (other than banks and insurance)
MG9.3	保險 Insurance
MG10	地產 Real estate
MG11	專業及商用服務 Professional and business services
MG11.1	法律服務 Legal services
MG11.2	會計、核數及簿記服務 Accounting, auditing and bookkeeping services
MG11.3	其他與建造及地產活動無關的工程及技術服務、商業管理及顧問服務 Engineering and technical services not related to construction and real estate activities, business management and consultancy services
MG11.4	設計、廣告及相關服務 Design, advertising and related services
MG11.5	與建造及地產相關的建築、測量及工程服務 Architectural, surveying and engineering services related to construction and real estate
MG11.6	雜項專業及商用服務 Miscellaneous professional and business services

MG12	社會及個人服務（不包括外籍家庭傭工） Social and personal services (excl. foreign domestic helpers)
MG12.1	人類保健活動 Human health activities
MG12.2	社會及個人服務（人類保健活動除外）（不包括外籍家庭傭工） Social and personal services (other than human health activities) (excl. foreign domestic helpers)

## II. 策略性行業（及分支行業）

### Strategic Sectors (& Sub-sectors)

#### SS1 資訊科技及資訊服務行業

##### Information Technology and Information Services (IT&IS) Sector

SS1.1 (MG8.1)	軟件出版及電訊活動 Software publishing and telecommunication activities
SS1.2 (MG8.2)	資訊科技相關服務 Information technology related services

#### SS2 金融服務

##### Financial Services

SS2.1 (MG9.1)	銀行 Banking
SS2.2 (MG9.2)	金融機構（銀行及保險除外） Financial institutions (other than banks and insurance)
SS2.3 (MG9.3)	保險 Insurance

#### SS3 貿易及物流

##### Trading and Logistics

SS3.1 (MG5.1)	進出口貿易 Import and export trade
SS3.2 (MG5.2)	批發 Wholesale
SS3.3 (MG7.1)	貨運服務 Freight transportation
	(i) 陸路貨運 Land freight transport
	(ii) 水上貨運 Water freight transport

- (iii) 航空貨運  
Air freight transport
- (iv) 其他貨運相關服務  
Other freight-related transportation services

SS3.4 (MG7.3) 貨倉及倉庫服務  
Warehousing and storage

SS3.5 (MG7.4) 郵政及速遞  
Postal and courier

**SS4 專業服務**  
**Professional Services**

SS4.1 (MG8.2) 資訊科技相關服務  
Information technology related services

SS4.2 (MG11.1) 法律服務  
Legal services

SS4.3 (MG11.2) 會計、核數及簿記服務  
Accounting, auditing and bookkeeping services

SS4.4 (MG11.3) 其他與建造及地產活動無關的工程及技術服務、商業管理及顧問服務  
Engineering and technical services not related to construction and real estate activities, business management and consultancy services

SS4.5 (MG11.4) 設計、廣告及相關服務  
Design, advertising and related services

SS4.6 (MG11.5) 與建造及地產相關的建築、測量及工程服務  
Architectural, surveying and engineering services related to construction and real estate

SS4.7 (MG12.1) 人類保健活動  
Human health activities

**SS5 旅遊業**  
**Tourism**

(I) 入境旅遊  
Inbound tourism

SS5.1 零售  
Retail trade

SS5.2 住宿服務  
Accommodation services

SS5.3 餐飲服務  
Food and beverage services

- SS5.4 過境客運服務  
Cross-boundary passenger transport services
- SS5.5 其他相關活動（例如：旅行代理、代訂服務及相關活動；本地交通、娛樂、博覽、電訊及地產發展和租賃）  
Other related activities (e.g. travel agency, reservation service and related activities; domestic transport, entertainment, convention, telecommunications and real estate development/leasing)
- (II) 外訪旅遊  
Outbound tourism
- SS5.6 旅行代理、代訂服務及相關活動  
Travel agency, reservation service and related activities
- SS5.7 過境客運服務  
Cross-boundary passenger transport services
  
- SS6 六項優勢產業（只限私營部分）  
**Six Industries (private sector only)**
- SS6.1 醫療產業  
Medical services
- SS6.2 教育產業  
Education services
- SS6.3 文化及創意產業  
Cultural and creative industries
- SS6.4 創新科技產業  
Innovation and technology
- SS6.5 檢測及認證產業  
Testing and certification services
- SS6.6 環保產業  
Environmental industries

### III. 資訊科技人員（主要行業類別中部分的人力）

#### IT Personnel (as part of the manpower in the major industry groups)

MG2	製造 Manufacturing
MG3	電力、燃氣和自來水供應及廢棄物管理 Electricity, gas and water supply, and waste management
MG4	建造 Construction
MG5-6	進出口貿易、批發及零售，住宿及膳食服務 Import/export, wholesale and retail trades, and accommodation and food services
MG7	運輸、倉庫、郵政及速遞服務 Transportation, storage, postal and courier services
MG8	資訊及通訊 Information and communications
MG9-11	金融服務、地產、專業及商用服務 Financial services, real estate, professional and business services
MG12	社會及個人服務（不包括外籍家庭傭工） Social and personal services (excl. foreign domestic helpers)

## 德爾菲法的簡介

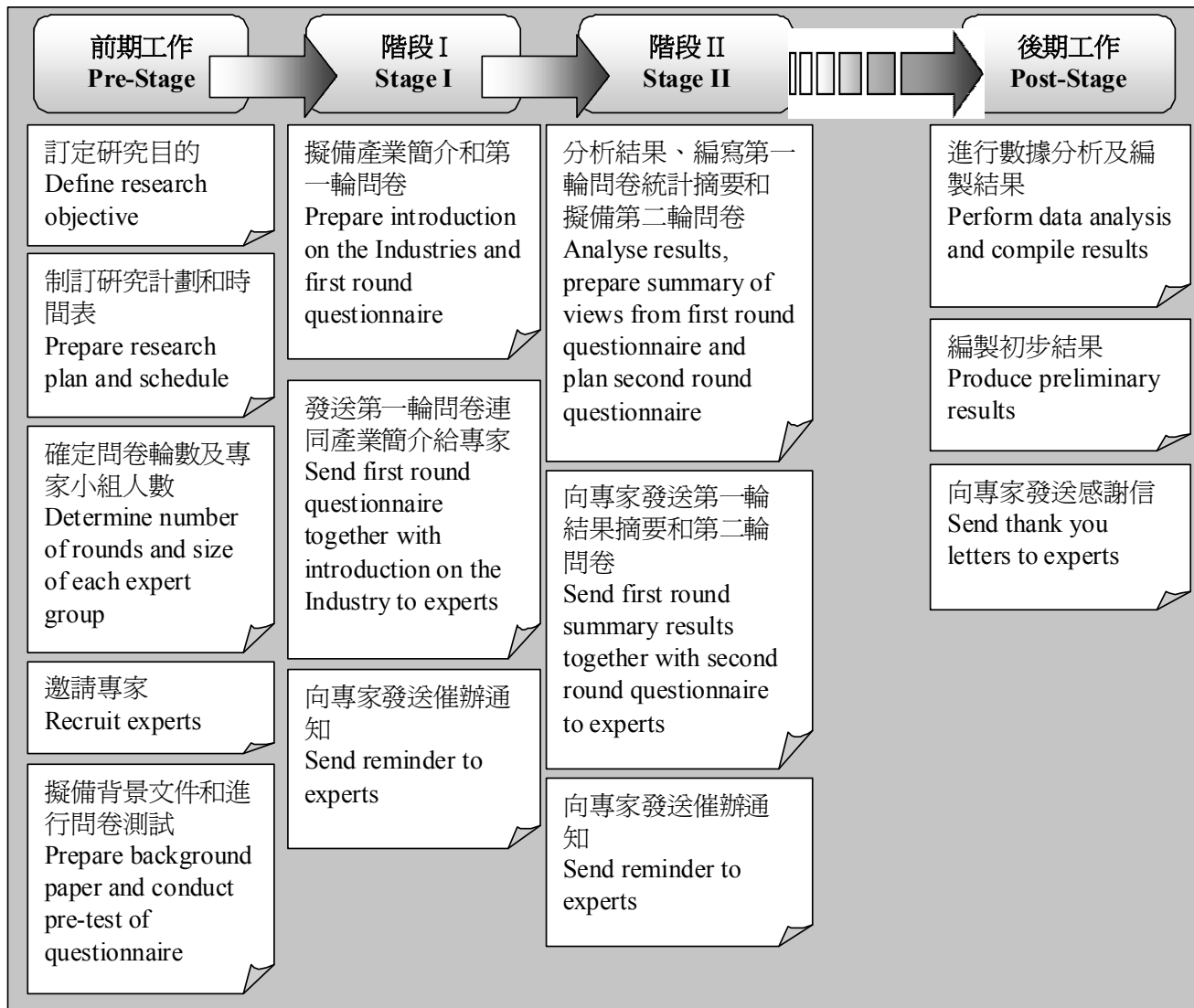
當缺乏與專題有關的資料時，德爾菲法是其中一種具成本效益的預測方法。透過一系列的問卷調查，5至20位在該專業領域的專家根據他們的知識和經驗，在特定的時段內對有可能發生的事件作出預測，以達成對該項預測的共識。協作人會根據專家在上一輪調查問卷所作的預測及理據編寫匿名摘要。專家可在這個互動的過程中，按需要修改其原先的估計。不同專家所預測的範圍一般在經過兩至三輪的問卷調查後會縮窄至可接受的水平，以收在短時間內取得結果的成效。由於數據收集只通過郵寄進行，因此探訪面談等人力資源可以節省。此外，因專家之間直接個人接觸而引致偏差估計的機會可減至最低。

透過德爾菲法，六項優勢產業增長率推算的研究工作流程，載於下圖：

## Brief introduction of the Delphi method

The Delphi method is a cost-effective forecasting technique when there is a lack of available information on the issue concerned. Knowledge and experience of a selected group of 5 to 20 experts in the areas of interest are tapped to form a consensus of combined opinion about what is likely to occur in specified time periods by administering a series of questionnaires. Through a facilitator who will prepare anonymous summary of the experts' forecasts from the previous round of questionnaire and the reasons they provided for their judgments, the experts are encouraged to revise their earlier estimates, if deemed appropriate. During the interactive processes, it is anticipated that the range of the results will be narrowed to an acceptable level, usually in two or three rounds, giving the advantage of getting the results in a short period of time. As data collection is solely done through mail correspondence, effort on field visits, etc. can be saved. On the other hand, the possibility of obtaining biased responses due to direct personal contacts among the experts can be minimised.

Operation flow of the study on obtaining information on projected growth rates of the Six Industries through the Delphi method is presented in the Diagram that follows :



二零一八年按主要行業類別劃分的人力需求推算  
Manpower requirement projection to 2018  
by major industry group

主要行業類別 Major Industry Group	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010	
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)
<b>MG1 農業、漁業及採石</b> <b>Agriculture, fishing and quarrying</b>	<b>3 700</b>	<b>0.1</b>	<b>3 000</b>	<b>0.1</b>	<b>-19.0</b>	<b>-2.6</b>
農業、漁業及採石 Agriculture, fishing and quarrying	3 700	0.1	3 000	0.1	-19.0	-2.6
<b>MG2 製造</b> <b>Manufacturing</b>	<b>121 000</b>	<b>3.7</b>	<b>94 100</b>	<b>2.6</b>	<b>-22.3</b>	<b>-3.1</b>
製造 Manufacturing	121 000	3.7	94 100	2.6	-22.3	-3.1
<b>MG3 電力、燃氣和自來水供應及廢棄物 管理</b> <b>Electricity, gas and water supply, and waste management</b>	<b>15 200</b>	<b>0.5</b>	<b>17 100</b>	<b>0.5</b>	<b>12.6</b>	<b>1.5</b>
電力、燃氣和自來水供應及廢棄物 管理 Electricity, gas and water supply, and waste management	15 200	0.5	17 100	0.5	12.6	1.5
<b>MG4 建造</b> <b>Construction</b>	<b>271 100</b>	<b>8.3</b>	<b>315 200</b>	<b>8.8</b>	<b>16.3</b>	<b>1.9</b>
建造 Construction	271 100	8.3	315 200	8.8	16.3	1.9
<b>MG5 進出口貿易、批發及零售</b> <b>Import/export, wholesale and retail trades</b>	<b>874 000</b>	<b>26.6</b>	<b>921 800</b>	<b>25.6</b>	<b>5.5</b>	<b>0.7</b>
MG5.1 進出口貿易 Import and export trade	503 400	15.3	523 900	14.6	4.1	0.5
MG5.2 批發 Wholesale	64 700	2.0	56 000	1.6	-13.5	-1.8
MG5.3 零售 Retail trade	305 900	9.3	341 900	9.5	11.8	1.4
<b>MG6 住宿及膳食服務</b> <b>Accommodation and food services</b>	<b>265 400</b>	<b>8.1</b>	<b>295 300</b>	<b>8.2</b>	<b>11.3</b>	<b>1.3</b>
MG6.1 住宿服務 Accommodation services	41 100	1.3	50 500	1.4	22.8	2.6
MG6.2 膳食服務 Food services	224 300	6.8	244 800	6.8	9.1	1.1



二零一八年按主要行業類別劃分的人力需求推算  
Manpower requirement projection to 2018  
by major industry group

主要行業類別 Major Industry Group	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010	
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)
<b>MG7 運輸、倉庫、郵政及速遞服務</b> <b>Transportation, storage, postal and courier services</b>	<b>321 300</b>	<b>9.8</b>	<b>345 800</b>	<b>9.6</b>	<b>7.6</b>	<b>0.9</b>
MG7.1 貨運服務 Freight transportation	167 800	5.1	178 100	5.0	6.1	0.7
MG7.2 雜項運輸服務 Miscellaneous transportation services	128 800	3.9	144 000	4.0	11.8	1.4
MG7.3 貨倉及倉庫服務 Warehousing and storage	6 400	0.2	7 800	0.2	21.8	2.5
MG7.4 郵政及速遞 Postal and courier	18 300	0.6	15 900	0.4	-12.8	-1.7
<b>MG8 資訊及通訊</b> <b>Information and communications</b>	<b>92 900</b>	<b>2.8</b>	<b>108 100</b>	<b>3.0</b>	<b>16.4</b>	<b>1.9</b>
MG8.1 軟件出版及電訊活動 Software publishing and telecommunication activities	19 500	0.6	20 100	0.6	3.2	0.4
MG8.2 資訊科技相關服務 Information technology related services	35 100	1.1	44 500	1.2	26.7	3.0
MG8.3 資訊及通訊相關雜項活動 Miscellaneous activities related to information and communications	38 300	1.2	43 500	1.2	13.5	1.6
<b>MG9 金融服務</b> <b>Financial services</b>	<b>207 000</b>	<b>6.3</b>	<b>253 100</b>	<b>7.0</b>	<b>22.3</b>	<b>2.5</b>
MG9.1 銀行 Banking	91 500	2.8	113 200	3.1	23.8	2.7
MG9.2 金融機構 (銀行及保險除外) Financial institutions (other than banks and insurance)	71 800	2.2	89 500	2.5	24.7	2.8
MG9.3 保險 Insurance	43 700	1.3	50 400	1.4	15.3	1.8

二零一八年按主要行業類別劃分的人力需求推算  
**Manpower requirement projection to 2018**  
**by major industry group**

主要行業類別 Major Industry Group	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010	
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)
<b>MG10 地產</b> <b>Real estate</b>	<b>119 000</b>	<b>3.6</b>	<b>135 100</b>	<b>3.8</b>	<b>13.5</b>	<b>1.6</b>
地產 Real estate	119 000	3.6	135 100	3.8	13.5	1.6
<b>MG11 專業及商用服務</b> <b>Professional and business services</b>	<b>329 000</b>	<b>10.0</b>	<b>370 100</b>	<b>10.3</b>	<b>12.5</b>	<b>1.5</b>
MG11.1 法律服務 Legal services	20 500	0.6	26 100	0.7	27.7	3.1
MG11.2 會計、核數及簿記服務 Accounting, auditing and bookkeeping services	26 800	0.8	32 900	0.9	22.8	2.6
MG11.3 其他與建造及地產活動無關 的工程及技術服務、商業管 理及顧問服務 Engineering and technical services not related to construction and real estate activities, business management and consultancy services	48 300	1.5	56 600	1.6	17.2	2.0
MG11.4 設計、廣告及相關服務 Design, advertising and related services	26 000	0.8	29 800	0.8	14.4	1.7
MG11.5 與建造及地產相關的建築、 測量及工程服務 Architectural, surveying and engineering services related to construction and real estate	22 200	0.7	25 800	0.7	16.3	1.9
MG11.6 雜項專業及商用服務 Miscellaneous professional and business services	185 200	5.6	199 000	5.5	7.4	0.9

二零一八年按主要行業類別劃分的人力需求推算  
Manpower requirement projection to 2018  
by major industry group

主要行業類別 Major Industry Group	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010	
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)
<b>MG12 社會及個人服務(不包括外籍家庭傭工)</b> <b>Social and personal services</b> <b>(excl. foreign domestic helpers)</b>	<b>665 000</b>	<b>20.2</b>	<b>737 600</b>	<b>20.5</b>	<b>10.9</b>	<b>1.3</b>
MG12.1 人類保健活動 Human health activities	109 800	3.3	131 700	3.7	20.0	2.3
MG12.2 社會及個人服務(人類保健活動除外)(不包括外籍家庭傭工) Social and personal services (other than human health activities) (excl. foreign domestic helpers)	555 100	16.9	605 900	16.8	9.1	1.1
<b>所有經濟行業<sup>φ</sup></b> <b>Total in the economy</b>	<b>3 284 600</b>	<b>100.0</b>	<b>3 596 400</b>	<b>100.0</b>	<b>9.5</b>	<b>1.1</b>

註釋： 數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。  
Notes: Figures are rounded to the nearest 100 and may not add up to total due to rounding.

φ 不包括外籍家庭傭工。  
Excluding foreign domestic helpers.

二零一八年按策略性行業（六項優勢產業除外）劃分的人力需求推算  
Manpower requirement projection to 2018 by strategic sector  
(excluding the Six Industries)

策略性行業 Strategic Sector		二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010	
		人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)
<b>I.</b>	<b>資訊科技及資訊服務行業<sup>^</sup></b> <b>IT&amp;IS sector</b>	<b>54 600</b>	<b>1.7</b>	<b>64 600</b>	<b>1.8</b>	<b>18.3</b>	<b>2.1</b>
SS1	資訊科技及資訊服務行業 IT&IS sector	54 600	1.7	64 600	1.8	18.3	2.1
SS1.1 (MG8.1)	軟件出版及電訊活動 Software publishing and telecommunication activities	19 500	0.6	20 100	0.6	3.2	0.4
SS1.2 (MG8.2)	資訊科技相關服務 Information technology related services	35 100	1.1	44 500	1.2	26.7	3.0
<b>II.</b>	<b>四大支柱行業<sup>ψ</sup></b> <b>Four Pillar Industries</b>	<b>1 453 800</b>	<b>44.3</b>	<b>1 629 600</b>	<b>45.3</b>	<b>12.1</b>	<b>1.4</b>
SS2	金融服務 Financial services	207 000	6.3	253 100	7.0	22.3	2.5
SS2.1 (MG9.1)	銀行 Banking	91 500	2.8	113 200	3.1	23.8	2.7
SS2.2 (MG9.2)	金融機構（銀行及保險除外） Financial institutions (other than banks and insurance)	71 800	2.2	89 500	2.5	24.7	2.8
SS2.3 (MG9.3)	保險 Insurance	43 700	1.3	50 400	1.4	15.3	1.8
SS3	貿易及物流 Trading and logistics	760 600	23.2	781 700	21.7	2.8	0.3
SS3.1 (MG5.1)	進出口貿易 Import and export trade	503 400	15.3	523 900	14.6	4.1	0.5
SS3.2 (MG5.2)	批發 Wholesale	64 700	2.0	56 000	1.6	-13.5	-1.8
SS3.3 (MG7.1)	貨運服務 Freight transportation	167 800	5.1	178 100	5.0	6.1	0.7
	SS3.3(i) (MG7.1(i)) 陸路貨運 Land freight transport	79 900	2.4	73 700	2.1	-7.7	-1.0
	SS3.3(ii) (MG7.1(ii)) 水上貨運 Water freight transport	52 700	1.6	58 400	1.6	10.9	1.3
	SS3.3(iii) (MG7.1(iii)) 航空貨運 Air freight transport	33 500	1.0	44 100	1.2	31.7	3.5
	SS3.3(iv) (MG7.1(iv)) 其他貨運相關服務 Other freight-related transportation services	1 800	0.1	1 900	0.1	8.3	1.0

二零一八年按策略性行業（六項優勢產業除外）劃分的人力需求推算  
Manpower requirement projection to 2018 by strategic sector  
(excluding the Six Industries)

策略性行業 Strategic Sector		二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010	
		人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)
SS3.4 (MG7.3)	貨倉及倉庫服務 Warehousing and storage	6 400	0.2	7 800	0.2	21.8	2.5
SS3.5 (MG7.4)	郵政及速遞 Postal and courier	18 300	0.6	15 900	0.4	-12.8	-1.7
<b>SS4</b>	<b>專業服務 Professional services</b>	<b>288 700</b>	<b>8.8</b>	<b>347 400</b>	<b>9.7</b>	<b>20.3</b>	<b>2.3</b>
SS4.1 (MG8.2)	資訊科技相關服務 Information technology related services	35 100	1.1	44 500	1.2	26.7	3.0
SS4.2 (MG11.1)	法律服務 Legal services	20 500	0.6	26 100	0.7	27.7	3.1
SS4.3 (MG11.2)	會計、核數及簿記服務 Accounting, auditing and bookkeeping services	26 800	0.8	32 900	0.9	22.8	2.6
SS4.4 (MG11.3)	其他與建造及地產活動無關的工程及技 術服務、商業管理及顧問服務 Engineering and technical services not related to construction and real estate activities, business management and consultancy services	48 300	1.5	56 600	1.6	17.2	2.0
SS4.5 (MG11.4)	設計、廣告及相關服務 Design, advertising and related services	26 000	0.8	29 800	0.8	14.4	1.7
SS4.6 (MG11.5)	與建造及地產相關的建築、測量及工程服 務 Architectural, surveying and engineering services related to construction and real estate	22 200	0.7	25 800	0.7	16.3	1.9
SS4.7 (MG12.1)	人類保健活動 Human health activities	109 800	3.3	131 700	3.7	20.0	2.3
<b>SS5</b>	<b>旅遊業 Tourism</b>	<b>197 500</b>	<b>6.0</b>	<b>247 400</b>	<b>6.9</b>	<b>25.3</b>	<b>2.9</b>
	(I) 入境旅遊 Inbound tourism	169 600	5.2	217 100	6.0	28.0	3.1
SS5.1	零售 Retail trade	85 400	2.6	109 000	3.0	27.7	3.1
SS5.2	住宿服務 Accommodation services	27 900	0.8	34 300	1.0	22.8	2.6
SS5.3	餐飲服務 Food and beverage services	29 200	0.9	39 000	1.1	33.7	3.7

二零一八年按策略性行業（六項優勢產業除外）劃分的人力需求推算  
Manpower requirement projection to 2018 by strategic sector  
(excluding the Six Industries)

策略性行業 Strategic Sector	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010		
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)	
SS5.4	11 600	0.4	15 000	0.4	28.7	3.2	
	過境客運服務 Cross-boundary passenger transport services						
SS5.5	15 500	0.5	19 800	0.6	27.7	3.1	
	其他相關活動（例如：旅行代理、 代訂服務及相關活動；本地交通、 娛樂、博覽、電訊及地產發展和租 賃） Other related activities (e.g. travel agency, reservation service and related activities; domestic transport, entertainment, convention, telecommunications and real estate development/leasing)						
	(II) 外訪旅遊 Outbound tourism	27 900	0.8	30 300	0.8	8.8	1.1
SS5.6	19 100	0.6	20 400	0.6	6.6	0.8	
	旅行代理、代訂服務及相關活動 Travel agency, reservation service and related activities						
SS5.7	8 800	0.3	10 000	0.3	13.5	1.6	
	過境客運服務 Cross-boundary passenger transport services						

二零一八年按策略性行業 (六項優勢產業除外) 劃分的人力需求推算  
Manpower requirement projection to 2018 by strategic sector  
(excluding the Six Industries)

策略性行業 Strategic Sector	二零一零年 實際就業人數 Actual employment in 2010		二零一八年 人力需求推算 Projected manpower requirement in 2018		二零一八年與二零一零年 比較的變動情況 Change in 2018 over 2010		
	人數 Number	所佔 百分比 % share	人數 Number	所佔 百分比 % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)	
<b>III.</b>	<b>資訊科技人員 (主要行業類別中部分的人力) <sup>+</sup></b>						
	<b>IT Personnel (as part of the manpower in the major industry groups)</b>						
	73 400	2.2	92 200	2.6	25.6	2.9	
MG2	製造 Manufacturing	1 700	0.1	1 600	§	-5.5	-0.7
MG3	電力、燃氣和自來水供應及廢 棄物管理 Electricity, gas and water supply, and waste management	400	§	400	§	-9.2	-1.2
MG4	建造 Construction	300	§	300	§	0.0	0.0
MG5-6	進出口貿易、批發及零售、住 宿及膳食服務 Import/export, wholesale and retail trades, and accommodation and food services	15 700	0.5	17 200	0.5	9.1	1.1
MG7	運輸、倉庫、郵政及速遞服務 Transportation, storage, postal and courier services	1 900	0.1	1 900	0.1	0.0	0.0
MG8	資訊及通訊 Information and communications	27 600	0.8	39 300	1.1	42.2	4.5
MG9-11	金融服務、地產、專業及商用 服務 Financial services, real estate, professional and business services	14 000	0.4	18 200	0.5	29.7	3.3
MG12	社會及個人服務 (不包括外籍 家庭傭工) Social and personal services (excl. foreign domestic helpers)	11 700	0.4	13 400	0.4	14.4	1.7

註釋：數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。

Notes: Figures are rounded to the nearest 100 and may not add up to total due to rounding.

^ 「資訊科技及資訊服務」行業的人力需求包括「資訊科技及資訊服務」機構的所有員工，除「資訊科技人員」以外，亦包括從事其他職業的人員。

Manpower requirement in the IT&IS industry sector includes all persons working in IT&IS companies. Apart from IT personnel, persons engaged in other occupations are also included.

ψ 由於進行推算時，四大支柱行業的二零一零年數字還未備妥，因此使用了參照二零零九年的相關數字編製而成的估計數字。

As figures of the Four Pillar Industries for 2010 were not yet available at the time when the projection was performed, estimates compiled using the relevant data in 2009 were used.

+ 資訊科技人員包括所有行業機構單位內從事與資訊科技有關的職業的人員。有關統計數字以職業訓練局有關的人力統計調查結果為基礎。

IT personnel include persons engaged in IT related occupations in establishments of all industries. Statistics on IT personnel are based on the results of a related manpower survey conducted by the Vocational Training Council.

§ 少於 0.05。  
Less than 0.05.

二零一五年按策略性行業（六項優勢產業）劃分的人力需求推算  
Manpower requirement projection to 2015 by strategic sector (the Six Industries)

策略性行業（六項優勢產業） Strategic Sector (Six Industries)	二零零九年 實際就業人數 Actual employment in 2009		二零一五年 人力需求推算 Projected manpower requirement in 2015		二零一五年與二零零九年 比較的變動情況 Change in 2015 over 2009	
	人數 Number	所佔 百分比 <sup>θ</sup> % share	人數 <sup>∞</sup> Number	所佔 百分比 <sup>θ</sup> % share	變動 百分率 % change	按年平均 增長率 Average annual growth rate (%)
SS6.1 醫療產業 Medical services	72 000	2.1	86 000	2.3	19.4	3.0
SS6.2 教育產業 Education services	62 200	1.8	80 600	2.1	29.5	4.4
SS6.3 文化及創意產業 Cultural and creative industries	188 300	5.4	207 100	5.5	10.0	1.6
SS6.4 創新科技產業 Innovation and technology	27 500	0.8	35 800	0.9	30.2	4.5
SS6.5 檢測及認證產業 Testing and certification services	12 600	0.4	14 500	0.4	14.6	2.3
SS6.6 環保產業 Environmental industries	32 400	0.9	41 700	1.1	28.7	4.3
<b>小計</b> <b>Sub-total</b>	<b>395 000</b>	<b>11.3</b>	<b>465 600</b>	<b>12.4</b>	<b>17.9</b>	<b>2.8</b>
<b>所有經濟行業</b> <b>Total in the economy</b>	<b>3 486 900</b>		<b>3 768 200</b>			

註釋： 推算按年平均增長率是使用德爾菲法的研究結果計算出來。

Notes: The projected average annual growth rates are derived from the results of the study using the Delphi method.

數字進位至百位整數。由於四捨五入關係，個別項目的數字加起來可能與總數略有出入。

Figures are rounded to the nearest 100 and may not add up to total due to rounding.

<sup>θ</sup> 為了與刊載於《香港統計月刊》二零一一年二月號內的專題文章「香港六項優勢產業在二零零八年及二零零九年的情況」的數字一致，「所佔百分比」是指各個行業的就業人數佔總就業人數（包括外籍家庭傭工）的百分比。

Figures refer to the percentage share of employment of each industry to the total employment with figures of foreign domestic helpers (FDHs) included so as to be consistent with the figures published in the feature article "The Situation of the Six Industries in Hong Kong in 2008 and 2009" in the February 2011 issue of the *Hong Kong Monthly Digest of Statistics*.

<sup>∞</sup> 推算數字是根據在穩定經濟環境下（或正常估計）的推算增長率而編製。

Projected figures are compiled based on the projected growth rate under the stable economic environment (or the General Estimate).



## 簡稱對照表

### Abbreviation Table

全名 Full Name	簡稱 Abbreviation
決策局／部門 Bureaux/Departments	B/Ds
政府統計處 Census and Statistics Department	C&SD
就業綜合估計數字 Composite Employment Estimates	CEE
內地與香港關於建立更緊密經貿關係的安排 Closer Economic Partnership Arrangement	CEPA
經濟分析及方便營商處 Economic Analysis and Business Facilitation Unit	EABFU
教育及統籌局 Education and Manpower Bureau	EMB
外籍家庭傭工 Foreign Domestic Helpers	FDHs
本地生產總值 Gross Domestic Product	GDP
香港標準行業分類 Hong Kong Standard Industrial Classification	HSIC
資訊及通訊科技 Information and Communication Technologies	ICT
首次公開招股 Initial Public Offering	IPO
所有經濟活動的國際標準行業分類 International Standard Industrial Classification of All Economic Activities	ISIC
資訊科技及資訊服務 Information Technology and Information Services	IT&IS
勞工及福利局 Labour and Welfare Bureau	LWB
會議、獎勵、商務和展覽 Meetings, Incentives, Conventions and Exhibitions	MICE

**簡稱對照表（續）**  
**Abbreviation Table (cont'd)**

全名 Full Name	簡稱 Abbreviation
人力資源推算 Manpower Projection	MP
二零一八年人力資源推算 Manpower Projection to 2018	MP2018
人力資源供求差額 Manpower Resource Balance	MRB
人力需求推算 Manpower Requirement Projection	MRP
二零一八年人力需求推算 Manpower Requirement Projection to 2018	MRP2018
人力供應推算 Manpower Supply Projection	MSP
研究及發展 Research and Development	R&D
人民幣 Renminbi	RMB
二零一八年人力需求推算專責小組 Task Group on Manpower Requirement Projection to 2018	TGMRP2018
職業訓練局 Vocational Training Council	VTC
二零一八年人力資源推算工作小組 Working Group on Manpower Projection to 2018	WG on MP2018
世界貿易組織 World Trade Organization	WTO

**獲取政府統計處刊物及其他統計產品的方法**  
**Means of Obtaining Publications and Other Statistical Products**  
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