

Executive Summary

The 1999-based manpower requirement projection by economic sector is compiled to project the labour demand *by industry* for the planning year of 2005.

2. Based on the past data series during the 14-year period from 1986 to 1999, statistical modelling was conducted for 41 projection industry groups for detection of the underlying trend and for formulation of projection assumptions. Coupled with the expert advice solicited from 75 prominent organisations (including industry leaders, trade-specific associations, chambers of commerce, public organisations, well-known academics and Government bureaux/departments), the projected average annual growth rates for individual projection industry groups for the period 1999-2005 were derived. The projected growth rates were then applied to the base year figures in 1999 for derivation of manpower requirement by industry for 2005.

Projection Results

3. Total manpower requirement, covering all jobs based in Hong Kong but excluding foreign domestic helpers, is projected to continue to grow over the medium term, from 2.90 million in 1999 to 3.33 million in 2005, representing an average annual growth rate of 2.4%. This compares with the actually attained average annual employment growth of 1.4% for 1990-96¹ and 0.2% for 1996-99. To a certain extent, the much slower growth seen over 1996-99 was due to the contraction in manpower requirement in 1998-99 from the peak in 1997, caused by the economic downturn upon the impact of the Asian financial turmoil. Moreover, the actual employment growth over the past decade was capped by the overall labour supply. In the present projection exercise, such a constraint from the labour supply side is not imposed².

1 Based on the "Extended de facto Population", instead of the "Hong Kong Resident Population" currently adopted.

2 Actual employment is determined not only by labour demand, but also by the availability of labour, in terms of both quantities and mix, to meet such demand. In the present exercise, projection is made of manpower requirement free from constraint on the manpower supply side, so as to be able to reveal fully the degree of manpower resource imbalance or mismatch in the different segments. With the removal of this supply-side constraint, there would be a faster growth in manpower requirement over the projection period than the actual trend growth in employment recorded over the past years.

Manpower requirement by economic sector*

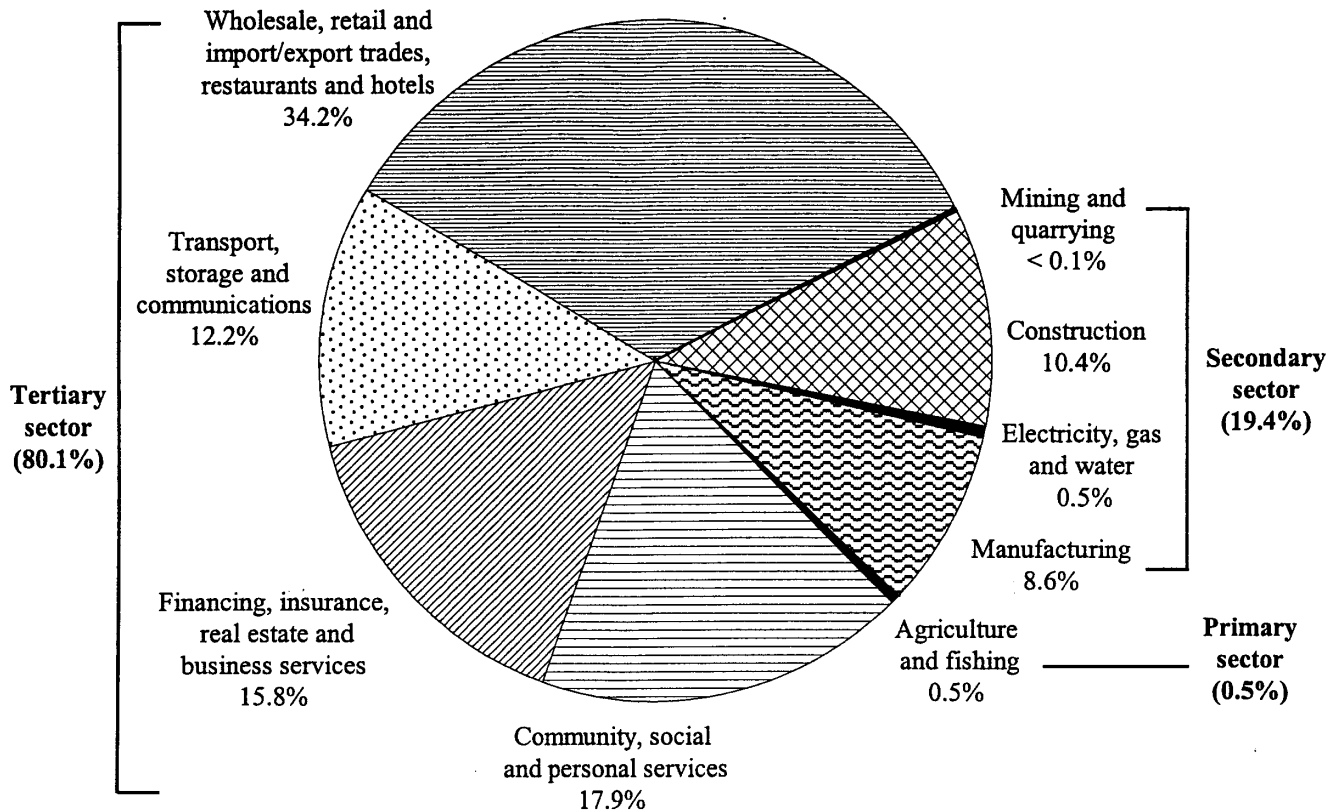
Economic sector	Actual employment in 1999		Projected manpower requirement in 2005		Change in 2005 over 1999		
	Number	% share	Number	% share	Number	% change	Average annual growth rate (%)
Primary							
Agriculture and fishing	13 100	(0.5)	9 600	(0.3)	-3 500	-26.8	-5.1
Secondary							
Mining and quarrying	400	(0.0)	300	(0.0)	-100	-16.9	-3.0
Manufacturing	248 500	(8.6)	196 800	(5.9)	-51 700	-20.8	-3.8
Electricity, gas and water	14 800	(0.5)	14 200	(0.4)	-500	-3.5	-0.6
Construction	300 200	(10.4)	350 500	(10.5)	50 300	16.7	2.6
Tertiary							
Wholesale, retail and import/export trades, restaurants and hotels	992 600	(34.2)	1 100 600	(33.0)	108 000	10.9	1.7
Transport, storage and communications	354 800	(12.2)	443 200	(13.3)	88 300	24.9	3.8
Financing, insurance, real estate and business services	457 000	(15.8)	632 900	(19.0)	175 900	38.5	5.6
Community, social and personal services [#]	518 200	(17.9)	585 100	(17.6)	67 000	12.9	2.0
All economic sectors	2 899 500	(100.0)	3 333 100	(100.0)	433 600	15.0	2.4

Notes: (*) Excluding Hong Kong residents working and employed by businesses outside Hong Kong, who numbered around 50 000 in 1999 and are projected at around 66 000 in 2005.

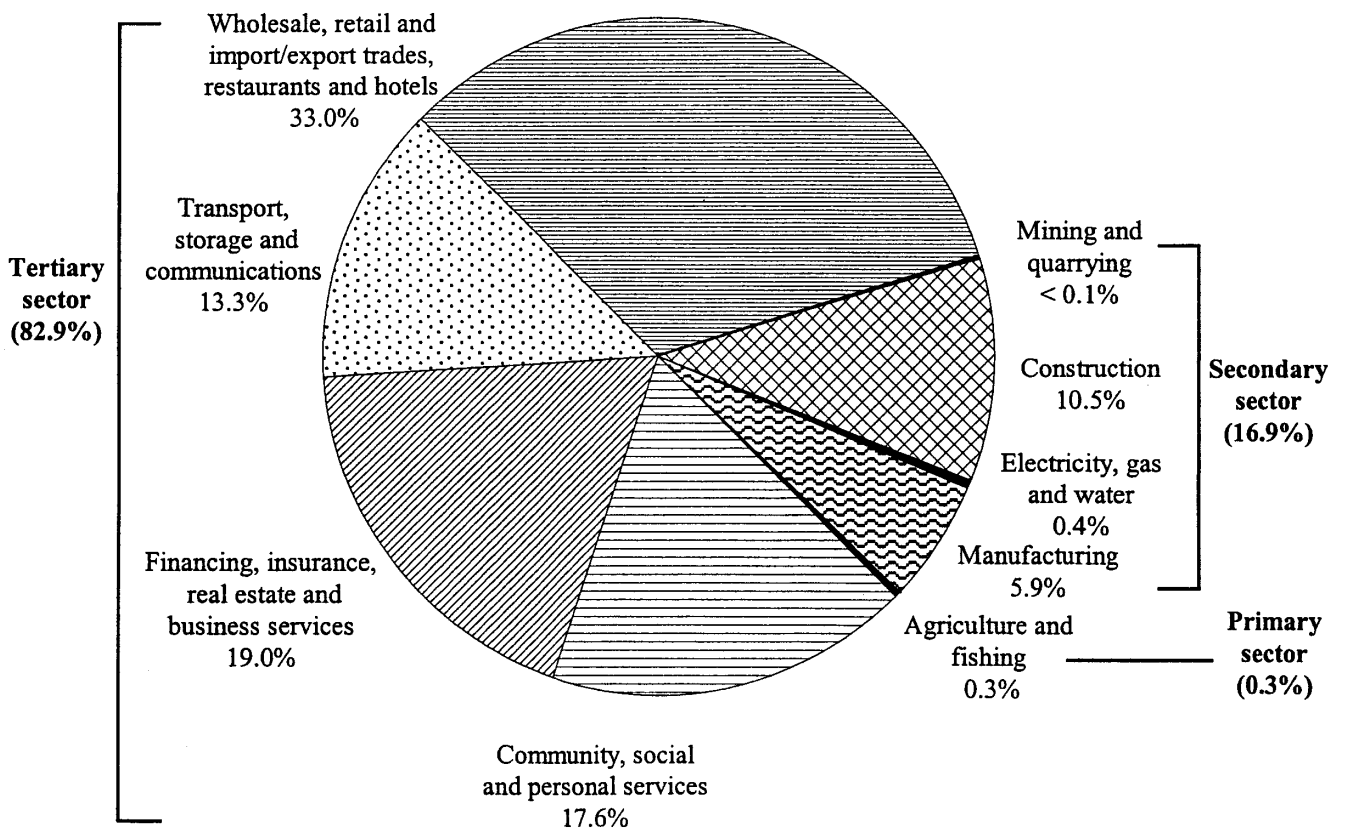
(#) Excluding foreign domestic helpers, who numbered 184 200 in 1999 and are projected at 224 300 in 2005. If foreign domestic helpers are also included, overall manpower requirement in Hong Kong is projected to increase from 3 083 700 in 1999 to 3 557 400 in 2005.

Figures may not add up exactly to the total due to rounding.

Actual employment by economic sector, 1999



Projected manpower requirement by economic sector, 2005



Structural change

4. The main impetus to growth in total manpower requirement will come from a further expansion of the tertiary sector, following the continuous structural shift towards services and related activities in the local economy.
5. A 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 overall total projected to rise further from 80% in 1999 to 83% in 2005.
6. On the other hand, the share of the secondary sector in overall manpower requirement is projected to continue to decline, from 19% in 1999 to 17% in 2005. This is attributable entirely to a further contraction in the share of “Manufacturing” sector, from 9% to 6%. The corresponding share for the “Construction” sector is expected to hold steady, at around 10% over the period.
7. As to the primary sector, its share in overall manpower requirement is projected to stay at less than 1% up to 2005.

Analysis by economic sector

8. The individual industries, services and trades that make up these broader economic sectors are expected to show different growth profiles, as indicated below:
 - Within the service sectors, the “Wholesale, retail and import/export trades, restaurants and hotels” sector is expected to remain the largest source of manpower requirement over the medium term, with the number of jobs projected at 1 100 600 in 2005. This will be followed by “Financing, insurance, real estate and business services” (632 900); “Community, social and personal services” (585 100); and “Transport, storage and communications” (443 200).
 - As to manpower requirement in “Construction”, the total number of jobs is projected at 350 500 in 2005. Meanwhile, manpower requirement in “Manufacturing” is projected to fall to 196 800 in 2005. Other sectors where a reduction in manpower requirement is also projected include “Electricity, gas and water” (to 14 200 in 2005); “Agriculture and fishing” (9 600); and “Mining and quarrying” (300).

- Ranked in terms of growth rate, the “Financing, insurance, real estate and business services” sector is projected to have the fastest growth in manpower requirement, averaging at 5.6% per annum over the period 1999-2005. This is largely underpinned by:
 - ✧ China’s accession to the World Trade Organisation (WTO), which can be expected to bring about enormous opportunities not only in the financial field but also to a variety of business services (e.g. management consultancy, computer-related services, accountancy, advertising, legal services and infrastructure-related services); and
 - ✧ the growing demand for e-commerce and information technology (IT) applications, which will induce more companies to develop IT and related business activities.
- “Transport, storage and communications” will be another service sector with good growth potential. Its manpower requirement is projected to increase by an average of 3.8% per annum over 1999-2005, attributable largely to:
 - ✧ rapid development of telecommunications services, particularly 3G mobile phone and broadband Internet services;
 - ✧ greater demand for some of the transport services (e.g. courier and logistics services), along with the spread in e-commerce serving both households and business entities; and
 - ✧ steady growth in air transport services, in tandem with further development of Hong Kong as an aviation hub in the region.
- As to the “Community, social and personal services” sector, manpower requirement is expected to grow by an average of 2.0% per annum over 1999-2005, in line with sustained growth in the population.
- By comparison, the “Wholesale, retail and import/export trades, restaurants and hotels” sector is expected to have more moderate growth in manpower requirement, by an average of 1.7% per annum over 1999-2005. Growth impetus will come mainly from the following two sources:
 - ✧ a further pick-up in import/export trade, upon China’s accession to WTO; and

- ◇ further expansion in retail trade, restaurants and hotels, on the back of sustained growth in local consumption and inbound tourism.
- In stark contrast, manpower requirement in the local “Manufacturing” sector is projected to continue to shrink, by an average of 3.8% per annum over 1999-2005. This is largely attributable to a further reduction in manpower requirement in the “Textiles” and the “Wearing apparel” industries, by a total of 28 900 jobs over the period, consequential to:
 - ◇ further relocation of such factories to the Mainland upon China’s accession to WTO; and
 - ◇ full elimination of the quota system by 2005.
- Yet not all industries within the “Manufacturing” sector may suffer a loss in jobs. As a notable exception, manpower requirement in the “Computing machinery and equipment” and the “Electronic parts and components” industries, which are IT-related, is expected to be higher in 2005 than in 1999, by 3 200 jobs.
- “Agriculture and fishing”, “Mining and quarrying”, and “Electricity, gas and water” are sectors with relatively small size of employment. Thus, while decreases in manpower requirement are projected for these sectors in 2005 over 1999, the numbers involved are expected to be not large, at a total of about 4 100 jobs.

Growth spots

9. Taking all the economic sectors together, the total manpower requirement is projected to increase by 433 600 between 1999 and 2005. About half of these jobs will come from employment gains in various “Business services”, the “Import/export trade”, and “Off-site construction”. Also worth noting is that those sectors with relatively high knowledge content, such as “Computing machinery and equipment”, and “Telecommunications and Internet services”, are expected to show the fastest growth in manpower requirement.

摘要

政府統計處以一九九九年為基期，編製了一份按經濟行業劃分的人力需求推算，以便按行業預測二零零五年的勞工需求。

2. 本處根據一九八六年至一九九九年十四年間的統計數列，分別將 41 個行業組別配以合適的統計模型，研究其基本趨勢，設定推算假設，並綜合了 75 間主要機構單位（包括行業領導、行業組織、商會、公共機構、著名學者、政府決策局及部門）的專家意見，得出各個行業組別於一九九九年至二零零五年間的平均每年增長率。然後再把這些推算增長率應用於一九九九年的基期數字上，從而得出二零零五年按行業劃分的人力需求。

推算結果

3. 人力需求涵蓋所有以香港為根據地的職位，外籍家庭傭工並不包括在內。根據預測，整體人力需求在中期將會持續增長，由一九九九年的二百九十萬增加至二零零五年的三百三十三萬，平均每年增長率達 2.4%。與過往實際達到的就業增長情況比較，一九九零至九六年間¹，平均每年增長率為 1.4%，而一九九六至九九年間的平均每年增長率則為 0.2%。值得注意是一九九六至九九年間的增長較慢，很大程度上是由於亞洲區內爆發金融風暴，導致經濟下調，以致在一九九八至九九年間人力需求自九七年的高峰下滑。而且，就業人數在過去十年的實際增長受到整體勞工供應所局限。而在這次人力需求推算中，是沒有為勞工供應設下限制的²。

1 根據「廣義時點人口」而並非現時採用的「居港人口」。

2 實際就業人數，不單取決於勞工需求，亦受制於勞工供應的數量及組合是否能夠相應配合。這次推算工作是基於未來人力需求不受人力供應的限制，以便能充分評估人力資源差額或錯配的情況。在沒有設定勞工供應的限制情況下，人力需求在推算期內的增長，將會較以往錄得的實際就業人數增長率為快。

按經濟行業劃分的人力需求情況*

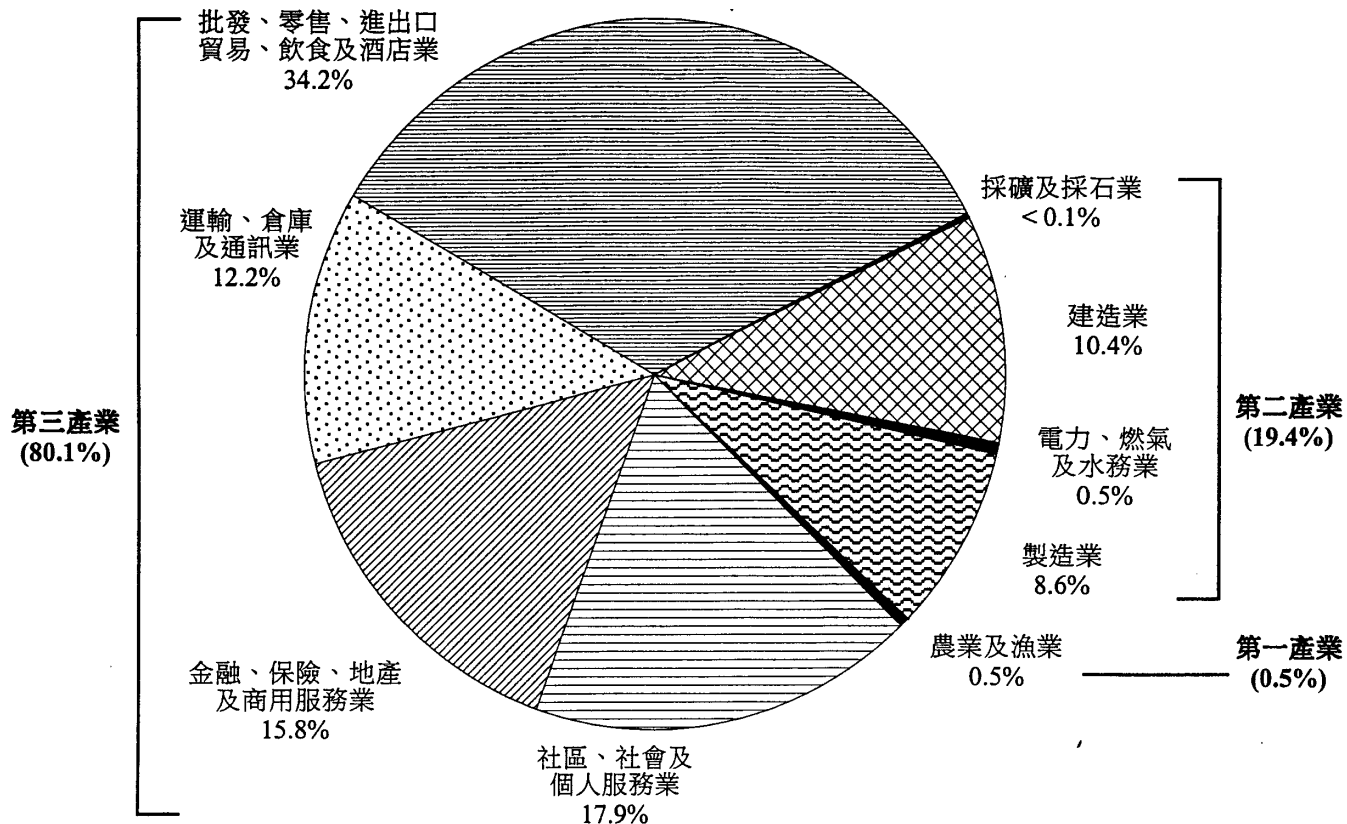
經濟產業	一九九九年 實際就業人數		二零零五年 人力需求推算		二零零五年與一九九九年 比較的變動情況		
	數目	百分比	數目	百分比	數目	百分率	平均每年 變動 增長率 (%)
第一產業							
農業及漁業	13 100	(0.5)	9 600	(0.3)	-3 500	-26.8	-5.1
第二產業							
採礦及採石業	400	(0.0)	300	(0.0)	-100	-16.9	-3.0
製造業	248 500	(8.6)	196 800	(5.9)	-51 700	-20.8	-3.8
電力、燃氣及 水務業	14 800	(0.5)	14 200	(0.4)	-500	-3.5	-0.6
建造業	300 200	(10.4)	350 500	(10.5)	50 300	16.7	2.6
第三產業							
批發、零售、進出 口貿易、飲食及 酒店業	992 600	(34.2)	1 100 600	(33.0)	108 000	10.9	1.7
運輸、倉庫及 通訊業	354 800	(12.2)	443 200	(13.3)	88 300	24.9	3.8
金融、保險、地產 及商用服務業	457 000	(15.8)	632 900	(19.0)	175 900	38.5	5.6
社區、社會及 個人服務業 [#]	518 200	(17.9)	585 100	(17.6)	67 000	12.9	2.0
所有經濟產業	2 899 500	(100.0)	3 333 100	(100.0)	433 600	15.0	2.4

註釋：(*) 所列數字不包括由香港以外的公司直接僱用在香港以外地區工作的香港居民，有關的就業人數於一九九九年約為 50 000 人，預計於二零零五年約為 66 000 人。

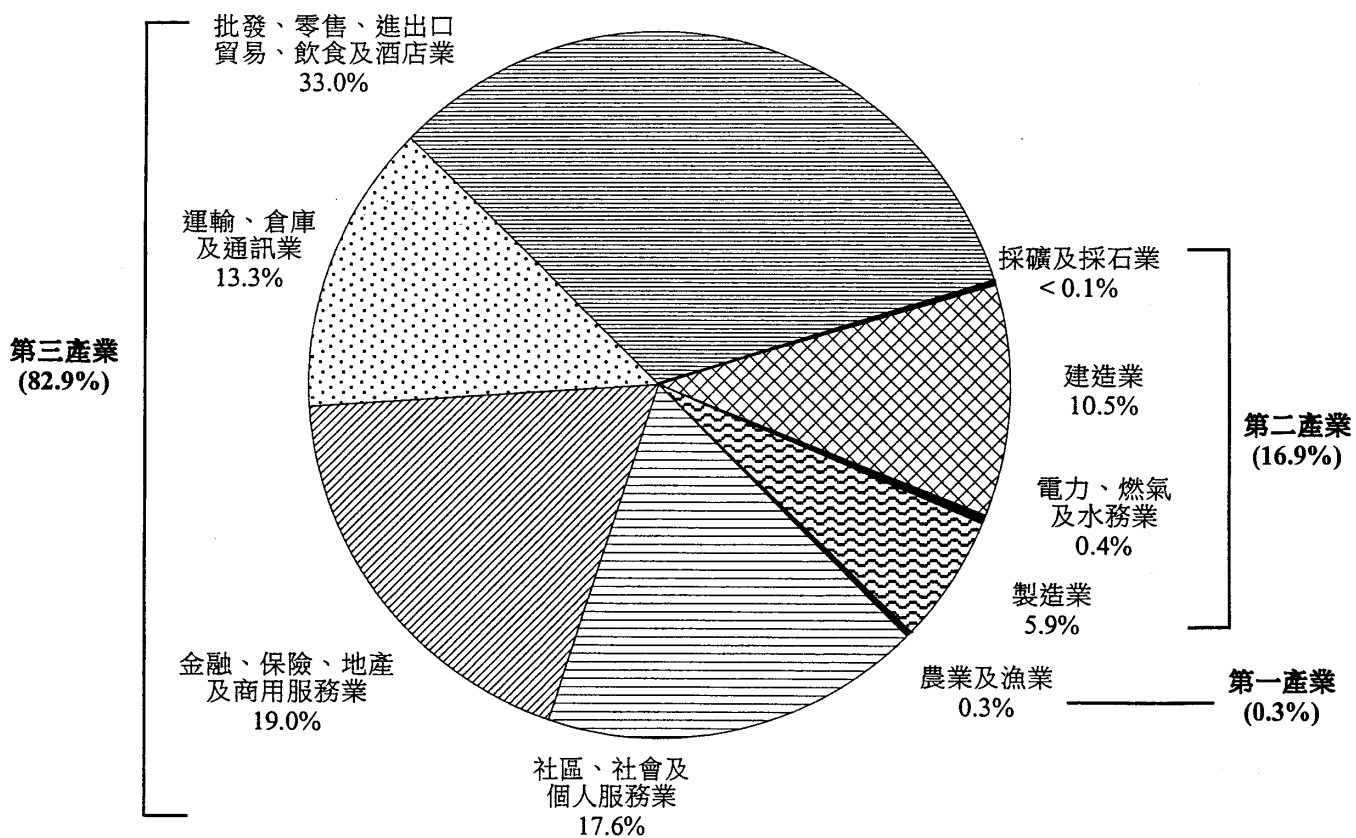
(#) 所列數字不包括外籍家庭傭工，於一九九九年為 184 200 人，預計於二零零五年為 224 300 人。如果把外籍家庭傭工的人力需求計算在內，預計香港整體的人力需求將會由一九九九年的 3 083 700 增加至二零零五年的 3 557 400。

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。

一九九九年按經濟行業劃分的實際就業情況



二零零五年按經濟行業劃分的人力需求推算



結構性轉變

4. 隨著本地經濟結構持續轉變，服務和有關的經濟活動日益頻繁，第三產業將進一步擴展，成為總人力需求增長的主要動力來源。
5. 按經濟產業分析，第三產業（包括各服務業）在中期將成為人力需求增長的主要來源。其所佔總人力需求的百分比，將由一九九九年的 80%，進一步上升至二零零五年的 83%。
6. 另一方面，第二產業佔總人力需求的百分比將持續下降，預期將由一九九九年的 19%，下降至二零零五年的 17%。這完全是由於同期「製造業」所佔總人力需求的百分比進一步下跌，由 9% 縮減至 6%。然而，同期「建造業」所佔的比例則大致穩定於 10% 左右。
7. 第一產業佔總人力需求的百分比，將維持少於 1%，直至二零零五年。

按經濟行業分析

8. 主要產業內個別經濟行業的增長模式各有不同，現略述如下：
 - 服務業內的「批發、零售、進出口貿易、飲食及酒店業」在中期仍然是人力需求的最大來源，推算在二零零五年共有 1 100 600 個職位，隨後的是「金融、保險、地產及商用服務業」（632 900）、「社區、社會及個人服務業」（585 100），以及「運輸、倉庫及通訊業」（443 200）。
 - 預計於二零零五年「建造業」的人力需求為 350 500 個職位。與此同時，「製造業」的人力需求將下降至 196 800 人。其他對人力需求減少的行業，包括「電力、燃氣及水務業」（於二零零五年預期有 14 200 個職位）、「農業及漁業」（9 600）和「採礦及採石業」（300）。
 - 按增長率計算，「金融、保險、地產及商用服務業」將會是人力需求增長最快的行業，於一九九九年至二零零五年期間，預計平均每年的增長率高達 5.6%。主要原因如下：
 - ◇ 中國加入世界貿易組織後，不但會為金融業，也會為各種商用服務業（例如管理顧問服務、與電腦有關的服務、會計、廣告、法律服務以及與基建有關的服務）帶來龐大的商機；及
 - ◇ 市場對電子商貿和資訊科技應用的需求日益殷切，促使更多公司發展資訊科技及有關的業務。

- 「運輸、倉庫及通訊業」是另一個具備良好增長潛力的服務業，預計在一九九九年至二零零五年期間的人力需求，將以平均每年 3.8% 的幅度增長。主要因為：
 - ◇ 電訊服務的迅速發展，尤以第三代流動電話和互聯網寬頻服務為主；
 - ◇ 隨著為住戶和商業機構提供服務的電子商貿日益普及，相關的運輸服務（例如速遞和物流處理）的勞工需求將會大增；及
 - ◇ 空運服務的持續增長，與香港進一步發展成為區內的航空樞紐，同步前進。

- 「社區、社會及個人服務業」的人力需求，會配合持續增長的人口，預計在一九九九年至二零零五年期間，平均每年的增幅為 2.0%。

- 相比之下，預期「批發、零售、進出口貿易、飲食及酒店業」人力需求的增長會較為溫和。於一九九九年至二零零五年期間，平均每年的增長率為 1.7%。增長動力主要來自以下兩方面：
 - ◇ 進出口貿易因為中國加入世貿後，將會進一步上升；及
 - ◇ 本地內部消費和訪港旅客將持續增加，並帶動零售、飲食和酒店業務進一步擴展。

- 相反，「製造業」的人力需求將持續收縮。於一九九九年至二零零五年期間，平均每年的跌幅達 3.8%，主要是由於「紡織製品業」和「服裝製品業」的人力需求進一步下降，期間將減少 28 900 個職位。主要原因如下：
 - ◇ 中國加入世貿後，廠商進一步把工廠遷離香港；及
 - ◇ 配額制度將於二零零五年完全取消。

- 不過，並不是所有製造行業的職位都會減少。值得注意的例外是，與資訊科技有關的「計算及會計器材製造業」和「電子零件製造業」，預計於二零零五年的職位數目將會較一九九九年增加約 3 200 個。

- 「農業及漁業」、「採礦及採石業」和「電力、燃氣及水務業」，均為就業人數相對較少的行業。因此，雖然預期於二零零五年有關行業的人力需求將會減少，但刪減的數目不會太大，合共約 4 100 個職位。

增長重點

9. 綜合所有經濟行業計算，預計在一九九九年至二零零五年期間，總人力需求的增長達 433 600 個職位。當中，約半數的增長來自「商用服務業」、「進出口貿易業」和「建造業（地盤工人除外）」。此外，值得注意的是那些需要較高知識內容的行業，如「計算及會計器材製造業」和「電訊及互聯網服務業」，其人力需求增長將會最快。