

職業退休計劃統計數字

ORSO SCHEMES STATISTICS

統計數字

Statistics

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A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2009年9月30日，總共有7,023個職業退休計劃，包括4,959個職業退休註冊計劃及2,064個職業退休豁免計劃。在這7,023個職業退休計劃中，有4,489個計劃獲強積金豁免。下列的統計數字可較全面地分析這些計劃的特點。

As at 30 September 2009, there were 7,023 ORSO schemes, comprising of 4,959 ORSO registered schemes and 2,064 ORSO exempted schemes. Out of these 7,023 ORSO schemes 4,489 schemes were exempted from MPF requirements. The following statistics are compiled to give a more comprehensive picture of the characteristics of these schemes.

按利益種類劃分的職業退休計劃數目

Number of ORSO Schemes by Benefit Type

	界定 供款計劃 Defined Contribution Schemes	界定 利益計劃 Defined Benefit Schemes	總數 Total
獲強積金豁免 MPF Exempted	4,104 (91%)	385 (9%)	4,489 (100%)
沒有強積金豁免 Non-MPF Exempted	1,666 (66%)	868 (34%)	2,534 (100%)
總數 Total	5,770 (82%)	1,253 (18%)	7,023 (100%)

按計劃安排劃分的職業退休計劃數目

Number of ORSO Schemes by Scheme Arrangement

	受保險安排 所規管 Regulated by Insurance Arrangement	受信託 所管限 Governed by Trust	其他 Others	總數 Total
獲強積金豁免 MPF Exempted	31 (1%)	4,361 (97%)	97 (2%)	4,489 (100%)
沒有強積金豁免 Non-MPF Exempted	517 (20%)	1,732 (68%)	285 (11%)	2,534 (99%)
總數 Total	548 (8%)	6,093 (87%)	382 (5%)	7,023 (100%)

按本籍劃分的職業退休計劃數目

Number of ORSO Schemes by Domicile

	以香港 為本籍 Hong Kong Domiciled	以離岸地區 為本籍 Offshore	總數 Total
獲強積金豁免 MPF Exempted	3,758 (84%)	731 (16%)	4,489 (100%)
沒有強積金豁免 Non-MPF Exempted	807 (32%)	1,727 (68%)	2,534 (100%)
總數 Total	4,565 (65%)	2,458 (35%)	7,023 (100%)

按匯集安排劃分的職業退休註冊計劃數目

Number of ORSO Registered Schemes by Pooling Arrangement

	參與匯集 協議的計劃 Pooled Schemes	不參與匯集 協議的計劃 Non-Pooled Schemes	總數 Total
獲強積金豁免 MPF Exempted	3,833 (92%)	338 (8%)	4,171 (100%)
沒有強積金豁免 Non-MPF Exempted	671 (85%)	117 (15%)	788 (100%)
總數 Total	4,504 (91%)	455 (9%)	4,959 (100%)

職業退休註冊計劃的成員數目

Number of Scheme Members for ORSO Registered Schemes

	香港身分證 持有人 HKID Card Holder	非香港身分證 持有人 Non-HKID Card Holder	總數 Total
獲強積金豁免 MPF Exempted	401,343 (98%)	6,525 (2%)	407,868 (100%)
沒有強積金豁免 Non-MPF Exempted	45,676 (98%)	1,040 (2%)	46,716 (100%)
總數 Total	447,019 (98%)	7,565 (2%)	454,584 (100%)

僱主及僱員的供款額 (百萬港元) (註)

Contribution Amount by Employers and Employees (HK\$m) (Note)

	僱主的供款 Employers' Contributions	僱員的供款 Employees' Contributions	總數 Total
獲強積金豁免 MPF Exempted	12,070 (77%)	3,624 (23%)	15,694 (100%)
沒有強積金豁免 Non-MPF Exempted	646 (80%)	161 (20%)	807 (100%)
總數 Total	12,716 (77%)	3,785 (23%)	16,501 (100%)

B. 截至 2009 年 9 月 30 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 September 2009

下列統計數字會每季重新編製

The following statistics are compiled on a quarterly basis.

計劃種類 Scheme Type	計劃數目 No. of Schemes		
	獲強積金豁免 MPF Exempted	沒有強積金豁免 Non-MPF Exempted	總數 Total
註冊計劃 Registered Schemes	4,171	788	4,959
豁免計劃 Exempted Schemes	318	1,746	2,064
總數 Total	4,489	2,534	7,023

在本季內新註冊的職業退休計劃數目

Number of ORSO Schemes Newly Registered During the Quarter

計劃安排 Scheme Arrangement	計劃數目 No. of Schemes		
	參與匯集協議的計劃 Pooled Schemes	不參與匯集協議的計劃 Non-Pooled Schemes	總數 Total
受保險安排所規管 Regulated by Insurance Arrangement	0	0	0
受信託所管限 Governed by Trust	7	0	7
總數 Total	7	0	7

職業退休註冊計劃的成員數目 - 按計劃安排及利益種類劃分
Membership Size of ORSO Registered Schemes - by Scheme Arrangement and by Benefit Type

(i) 獲強積金豁免的職業退休註冊計劃

MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	成員人數 No. of Members	計劃數目 No. of Schemes	成員人數 No. of Members	計劃數目 No. of Schemes	成員人數 No. of Members	計劃數目 No. of Schemes
受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	133,202	3,724	133,668	198	266,870	3,922
(ii) 界定利益計劃 Defined Benefit Schemes	9,868	109	131,130	140	140,998	249
(iii) 總數 Total	143,070	3,833	264,798	338	407,868	4,171

(ii) 沒有強積金豁免的職業退休註冊計劃

Non-MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	成員人數 No. of Members	計劃數目 No. of Schemes	成員人數 No. of Members	計劃數目 No. of Schemes	成員人數 No. of Members	計劃數目 No. of Schemes
(A) 受保險安排所管限 Regulated by Insurance Arrangement						
(i) 界定供款計劃 Defined Contribution Schemes	8,991	305	847	4	9,838	309
(ii) 界定利益計劃 Defined Benefit Schemes	333	5	0	0	333	5
(iii) 分項總數 Sub-total	9,324	310	847	4	10,171	314
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	12,592	355	17,014	95	29,606	450
(ii) 界定利益計劃 Defined Benefit Schemes	228	6	6,711	18	6,939	24
(iii) 分項總數 Sub-total	12,820	361	23,725	113	36,545	474
(C) 受保險安排所規管及受信託所管限的職業退休計劃總數 Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	21,583	660	17,861	99	39,444	759
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	561	11	6,711	18	7,272	29
(iii) 總數 Total	22,144	671	24,572	117	46,716	788

(iii) 獲強積金豁免及沒有強積金豁免的職業退休註冊計劃總數

Aggregate of MPF Exempted and Non-MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	成員人數 No. of Members	計劃數目 No. of Schemes	成員人數 No. of Members	計劃數目 No. of Schemes	成員人數 No. of Members	計劃數目 No. of Schemes
(A) 受保險安排所管限 Regulated by Insurance Arrangement						
(i) 界定供款計劃 Defined Contribution Schemes	8,991	305	847	4	9,838	309
(ii) 界定利益計劃 Defined Benefit Schemes	333	5	0	0	333	5
(iii) 分項總數 Sub-total	9,324	310	847	4	10,171	314
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	145,794	4,079	150,682	293	296,476	4,372
(ii) 界定利益計劃 Defined Benefit Schemes	10,096	115	137,841	158	147,937	273
(iii) 分項總數 Sub-total	155,890	4,194	288,523	451	444,413	4,645
(C) 受保險安排所規管及受信託所管限的職業退休計劃總數 Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	154,785	4,384	151,529	297	306,314	4,681
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	10,429	120	137,841	158	148,270	278
(iii) 總數 Total	165,214	4,504	289,370	455	454,584	4,959

職業退休註冊計劃的供款額 - 按計劃安排及利益種類劃分(註)
Contribution Amount of ORSO Registered Schemes - by Scheme Arrangement and by Benefit Type (Note)

(i) 獲強積金豁免的職業退休註冊計劃
MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes
受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,139	3,669	6,977	197	11,116	3,866
(ii) 界定利益計劃 Defined Benefit Schemes	276	107	4,302	140	4,578	247
(iii) 總數 Total	4,415	3,776	11,279	337	15,694	4,113

(ii) 沒有強積金豁免的職業退休註冊計劃

Non-MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes
(A) 受保險安排所管限 Regulated by Insurance Arrangement						
(i) 界定供款計劃 Defined Contribution Schemes	35	301	14	4	49	305
(ii) 界定利益計劃 Defined Benefit Schemes	4	5	0	0	4	5
(iii) 分項總數 Sub-total	39	306	14	4	53	310
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	86	347	513	87	599	434
(ii) 界定利益計劃 Defined Benefit Schemes	1	6	154	18	155	24
(iii) 分項總數 Sub-total	87	353	667	105	754	458
(C) 受保險安排所規管及受信託所管限的職業退休計劃總數 Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	121	648	527	91	648	739
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5	11	154	18	159	29
(iii) 總數 Total	126	659	681	109	807	768

(iii) 獲強積金豁免及沒有強積金豁免的職業退休註冊計劃總數

Aggregate of MPF Exempted and Non-MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes
(A) 受保險安排所管限 Regulated by Insurance Arrangement						
(i) 界定供款計劃 Defined Contribution Schemes	35	301	14	4	49	305
(ii) 界定利益計劃 Defined Benefit Schemes	4	5	0	0	4	5
(iii) 分項總數 Sub-total	39	306	14	4	53	310
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,225	4,016	7,490	284	11,715	4,300
(ii) 界定利益計劃 Defined Benefit Schemes	277	113	4,456	158	4,733	271
(iii) 分項總數 Sub-total	4,502	4,129	11,946	442	16,448	4,571
(C) 受保險安排所規管及受信託所管限的職業退休計劃總數 Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	4,260	4,317	7,504	288	11,764	4,605
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	281	118	4,456	158	4,737	276
(iii) 總數 Total	4,541	4,435	11,960	446	16,501	4,881

職業退休註冊計劃的資產值 - 按計劃安排及利益種類劃分(註)
Asset Size of ORSO Registered Schemes - by Scheme Arrangement and by Benefit Type (Note)

(i) 獲強積金豁免的職業退休註冊計劃

MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes
受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	46,738	3,669	76,235	197	122,973	3,866
(ii) 界定利益計劃 Defined Benefit Schemes	5,249	107	80,865	140	86,114	247
(iii) 總數 Total	51,987	3,776	157,100	337	209,087	4,113

(ii) 沒有強積金豁免的職業退休註冊計劃

Non-MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes
(A) 受保險安排所管限 Regulated by Insurance Arrangement						
(i) 界定供款計劃 Defined Contribution Schemes	1,092	301	125	4	1,217	305
(ii) 界定利益計劃 Defined Benefit Schemes	124	5	0	0	124	5
(iii) 分項總數 Sub-total	1,216	306	125	4	1,341	310
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	1,985	347	4,184	87	6,169	434
(ii) 界定利益計劃 Defined Benefit Schemes	37	6	2,224	18	2,261	24
(iii) 分項總數 Sub-total	2,022	353	6,408	105	8,430	458
(C) 受保險安排所規管及受信託所管限的職業退休計劃總數 Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	3,077	648	4,309	91	7,386	739
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	161	11	2,224	18	2,385	29
(iii) 總數 Total	3,238	659	6,533	109	9,771	768

(iii) 獲強積金豁免及沒有強積金豁免的職業退休註冊計劃總數

Aggregate of MPF Exempted and Non-MPF Exempted ORSO Registered Schemes

	參與匯集協議的計劃 Pooled Schemes		不參與匯集協議的計劃 Non-Pooled Schemes		總數 Total	
	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes	數額百萬港元 Amount HK\$m	計劃數目 No. of Schemes
(A) 受保險安排所管限 Regulated by Insurance Arrangement						
(i) 界定供款計劃 Defined Contribution Schemes	1,092	301	125	4	1,217	305
(ii) 界定利益計劃 Defined Benefit Schemes	124	5	0	0	124	5
(iii) 分項總數 Sub-total	1,216	306	125	4	1,341	310
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	48,723	4,016	80,419	284	129,142	4,300
(ii) 界定利益計劃 Defined Benefit Schemes	5,286	113	83,089	158	88,375	271
(iii) 分項總數 Sub-total	54,009	4,129	163,508	442	217,517	4,571
(C) 受保險安排所規管及受信託所管限的職業退休計劃總數 Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	49,815	4,317	80,544	288	130,359	4,605
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,410	118	83,089	158	88,499	276
(iii) 總數 Total	55,225	4,435	163,633	446	218,858	4,881

職業退休註冊計劃資產值的分佈(註)

Distribution of Asset Size of ORSO Registered Schemes (Note)

按匯集協議的數目劃分 - 匯集協議資產值幅度

By Number of Pooling Agreements - Asset Range for Pooling Agreements

(i) 獲強積金豁免的職業退休註冊計劃

MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	匯集協議的 數目 No. of Pooling Agreements	所涵蓋的計劃 數目 No. of Schemes Covered	資產值 (百萬港元) Asset Size (HK\$m)
<50	7	26	151
50 - < 100	7	67	489
100 - < 500	12	351	3,629
500 - < 1,000	5	232	4,110
1,000 - < 1,500	2	102	2,083
1,500 - < 2,000	0	0	0
>= 2,000	9	2,998	41,525
總數 Total	42	3,776	51,987

(ii) 沒有強積金豁免的職業退休註冊計劃

Non-MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	匯集協議的 數目 No. of Pooling Agreements	所涵蓋的計劃 數目 No. of Schemes Covered	資產值 (百萬港元) Asset Size (HK\$m)
<50	20	98	187
50 - < 100	4	26	114
100 - < 500	8	130	431
500 - < 1,000	4	123	712
1,000 - < 1,500	2	9	106
1,500 - < 2,000	0	0	0
>= 2,000	8	273	1,688
總數 Total	46	659	3,238

(iii) 獲強積金豁免及沒有強積金豁免的職業退休註冊計劃總數

Aggregate of MPF Exempted and Non-MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	匯集協議的 數目 No. of Pooling Agreements	所涵蓋的計劃 數目 No. of Schemes Covered	資產值 (百萬港元) Asset Size (HK\$m)
<50	24	124	338
50 - < 100	8	93	603
100 - < 500	13	481	4,060
500 - < 1,000	6	355	4,822
1,000 - < 1,500	2	111	2,189
1,500 - < 2,000	0	0	0
>= 2,000	9	3,271	43,213
總數 Total	62	4,435	55,225

按不參與匯集協議計劃的數目劃分 - 計劃的資產值幅度
By Number of Non-pooled Schemes - Asset Range for Schemes

(i) 獲強積金豁免的職業退休註冊計劃

MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	計劃數目 No. of Schemes	資產值 (百萬港元) Asset Size (HK\$m)
<5	26	67
5 - < 10	14	101
10 - < 20	32	434
20 - < 30	18	422
30 - < 40	21	717
40 - < 50	15	651
50 - < 60	28	1,518
60 - < 70	13	857
70 - < 80	6	460
80 - < 100	14	1,231
>= 100	150	150,642
總數 Total	337	157,100

(ii) 沒有強積金豁免的職業退休註冊計劃

Non-MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	計劃數目 No. of Schemes	資產值 (百萬港元) Asset Size (HK\$m)
<5	47	97
5 - < 10	11	68
10 - < 20	6	78
20 - < 30	6	152
30 - < 40	9	309
40 - < 50	2	86
50 - < 60	3	163
60 - < 70	2	123
70 - < 80	2	142
80 - < 100	3	265
>= 100	18	5,050
總數 Total	109	6,533

(iii) 獲強積金豁免及沒有強積金豁免的職業退休註冊計劃總數

Aggregate of MPF Exempted and Non-MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	計劃數目 No. of Schemes	資產值 (百萬港元) Asset Size (HK\$m)
<5	73	164
5 - < 10	25	169
10 - < 20	38	512
20 - < 30	24	574
30 - < 40	30	1,026
40 - < 50	17	737
50 - < 60	31	1,681
60 - < 70	15	980
70 - < 80	8	602
80 - < 100	17	1,496
>= 100	168	155,692
總數 Total	446	163,633

按匯集協議及不參與匯集協議計劃總數劃分 - 計劃的資產值幅度

By Aggregate of Pooled and Non-pooled Schemes - Asset Range for Schemes

(i) 獲強積金豁免的職業退休註冊計劃

MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	計劃數目 No. of Schemes	資產值 (百萬港元) Asset Size (HK\$m)
<1	669	357
1 - < 2	666	975
2 - < 10	1,617	7,903
10 - < 20	411	5,797
20 - < 30	145	3,550
30 - < 50	186	7,203
50 - < 100	172	11,418
>=100	247	171,884
總數 Total	4,113	209,087

(ii) 沒有強積金豁免的職業退休註冊計劃

Non-MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	計劃數目 No. of Schemes	資產值 (百萬港元) Asset Size (HK\$m)
<1	287	107
1 - < 2	126	185
2 - < 10	230	1,032
10 - < 20	48	663
20 - < 30	22	533
30 - < 50	20	732
50 - < 100	14	975
>=100	21	5,544
總數 Total	768	9,771

(iii) 獲強積金豁免及沒有強積金豁免的職業退休註冊計劃總數

Aggregate of MPF Exempted and Non-MPF Exempted ORSO Registered Schemes

資產值幅度 (百萬港元) Asset Range (HK\$m)	計劃數目 No. of Schemes	資產值 (百萬港元) Asset Size (HK\$m)
<1	956	464
1 - < 2	792	1,160
2 - < 10	1,847	8,935
10 - < 20	459	6,460
20 - < 30	167	4,083
30 - < 50	206	7,935
50 - < 100	186	12,393
>=100	268	177,428
總數 Total	4,881	218,858

註：統計數字乃根據截至2009年9月30日的職業退休註冊計劃向積金局呈交的最新周年申報表所載之資料而編製。

Note: These statistics are compiled on the basis of the latest annual returns filed with the MPFA up to 30 September 2009 in respect of registered schemes.