

職業退休計劃統計數字

ORSO SCHEMES STATISTICS

統計數字

Statistics

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Statistics on ORSO Schemes as at 31 December 2012

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2012年12月31日，總共有5,224個職業退休計劃，包括4,359個職業退休註冊計劃及865個職業退休豁免計劃。在這5,224個職業退休計劃中，有3,979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 31 December 2012, there were 5,224 ORSO schemes, comprising of 4,359 ORSO registered schemes and 865 ORSO exempted schemes. Out of these 5,224 ORSO schemes 3,979 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	3,632 (91%)	347 (9%)	3,979 (100%)
沒有強積金豁免 Non-MPF Exempted	1,007 (81%)	238 (19%)	1,245 (100%)
總數 Total	4,639 (89%)	585 (11%)	5,224 (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	27 (1%)	3,867 (97%)	85 (2%)	3,979 (100%)
沒有強積金豁免 Non-MPF Exempted	339 (27%)	818 (66%)	88 (7%)	1,245 (100%)
總數 Total	366 (7%)	4,685 (90%)	173 (3%)	5,224 (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	3,352 (84%)	627 (16%)	3,979 (100%)
沒有強積金豁免 Non-MPF Exempted	644 (52%)	601 (48%)	1,245 (100%)
總數 Total	3,996 (76%)	1,228 (24%)	5,224 (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	3,396 (92%)	309 (8%)	3,705 (100%)
沒有強積金豁免 Non-MPF Exempted	556 (85%)	98 (15%)	654 (100%)
總數 Total	3,952 (91%)	407 (9%)	4,359 (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	354,214 (98%)	6,869 (2%)	361,083 (100%)
沒有強積金豁免 Non-MPF Exempted	43,633 (99%)	416 (1%)	44,049 (100%)
總數 Total	397,847 (98%)	7,285 (2%)	405,132 (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	13,338 (78%)	3,687 (22%)	17,025 (100%)
沒有強積金豁免 Non-MPF Exempted	611 (76%)	196 (24%)	807 (100%)
總數 Total	13,949 (78%)	3,883 (22%)	17,832 (100%)

B. 截至 2012 年 12 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 December 2012

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	3,705	654	4,359
豁免計劃 Exempted Schemes	274	591	865
總數 Total	3,979	1,245	5,224

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	4	0	4
總數 Total	4	0	4

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	103,087	3,298	124,559	180	227,646	3,478
(ii) 界定利益計劃 Defined Benefit Schemes	7,522	98	125,915	129	133,437	227
(iii) 總數 Total	110,609	3,396	250,474	309	361,083	3,705

(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	7,781	242	825	3	8,606	245
(ii) 界定利益計劃 Defined Benefit Schemes	264	5	0	0	264	5
(iii) 分項總數 Sub-total	8,045	247	825	3	8,870	250
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	10,327	304	18,818	81	29,145	385
(ii) 界定利益計劃 Defined Benefit Schemes	159	5	5,875	14	6,034	19
(iii) 分項總數 Sub-total	10,486	309	24,693	95	35,179	404
(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)	18,108	546	19,643	84	37,751	630
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	423	10	5,875	14	6,298	24
(iii) 總數 Total	18,531	556	25,518	98	44,049	654

(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	7,781	242	825	3	8,606	245
(ii) 界定利益計劃 Defined Benefit Schemes	264	5	0	0	264	5
(iii) 分項總數 Sub-total	8,045	247	825	3	8,870	250
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	113,414	3,602	143,377	261	256,791	3,863
(ii) 界定利益計劃 Defined Benefit Schemes	7,681	103	131,790	143	139,471	246
(iii) 分項總數 Sub-total	121,095	3,705	275,167	404	396,262	4,109
(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)	121,195	3,844	144,202	264	265,397	4,108
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	7,945	108	131,790	143	139,735	251
(iii) 總數 Total	129,140	3,952	275,992	407	405,132	4,359

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	4,195	3,281	7,084	180	11,279	3,461
(ii) 界定利益計劃 Defined Benefit Schemes	319	98	5,427	129	5,746	227
(iii) 總數 Total	4,514	3,379	12,511	309	17,025	3,688

(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	49	240	14	3	63	243
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	49	245	14	3	63	248
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	109	301	581	79	690	380
(ii) 界定利益計劃 Defined Benefit Schemes	1	5	53	14	54	19
(iii) 分項總數 Sub-total	110	306	634	93	744	399
(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)	158	541	595	82	753	623
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	1	10	53	14	54	24
(iii) 總數 Total	159	551	648	96	807	647

(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	49	240	14	3	63	243
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	49	245	14	3	63	248
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,304	3,582	7,665	259	11,969	3,841
(ii) 界定利益計劃 Defined Benefit Schemes	320	103	5,480	143	5,800	246
(iii) 分項總數 Sub-total	4,624	3,685	13,145	402	17,769	4,087
(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)	4,353	3,822	7,679	262	12,032	4,084
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	320	108	5,480	143	5,800	251
(iii) 總數 Total	4,673	3,930	13,159	405	17,832	4,335

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	51,012	3,281	101,061	180	152,073	3,461
(ii) 界定利益計劃 Defined Benefit Schemes	5,121	98	93,204	129	98,325	227
(iii) 總數 Total	56,133	3,379	194,265	309	250,398	3,688

(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	1,039	240	126	3	1,165	243
(ii) 界定利益計劃 Defined Benefit Schemes	123	5	0	0	123	5
(iii) 分項總數 Sub-total	1,162	245	126	3	1,288	248
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,004	301	5,377	79	7,381	380
(ii) 界定利益計劃 Defined Benefit Schemes	28	5	2,457	14	2,485	19
(iii) 分項總數 Sub-total	2,032	306	7,834	93	9,866	399
(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)	3,043	541	5,503	82	8,546	623
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	151	10	2,457	14	2,608	24
(iii) 總數 Total	3,194	551	7,960	96	11,154	647

(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	1,039	240	126	3	1,165	243
(ii) 界定利益計劃 Defined Benefit Schemes	123	5	0	0	123	5
(iii) 分項總數 Sub-total	1,162	245	126	3	1,288	248
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	53,016	3,582	106,438	259	159,454	3,841
(ii) 界定利益計劃 Defined Benefit Schemes	5,149	103	95,661	143	100,810	246
(iii) 分項總數 Sub-total	58,165	3,685	202,099	402	260,264	4,087
(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)	54,055	3,822	106,564	262	160,619	4,084
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,272	108	95,661	143	100,933	251
(iii) 總數 Total	59,327	3,930	202,225	405	261,552	4,335

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	8	24	150
50 - < 100	3	7	218
100 - < 500	13	332	3,527
500 - < 1,000	4	69	2,808
1,000 - < 1,500	4	256	4,799
1,500 - < 2,000	1	201	1,363
>= 2,000	7	2,490	43,268
總數 Total	40	3,379	56,133

(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	19	85	189
50 - < 100	1	1	10
100 - < 500	9	124	501
500 - < 1,000	3	99	716
1,000 - < 1,500	4	15	162
1,500 - < 2,000	1	31	139
>= 2,000	6	196	1,477
總數 Total	43	551	3,194

(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	26	109	339
50 - < 100	3	8	228
100 - < 500	14	456	4,028
500 - < 1,000	5	168	3,524
1,000 - < 1,500	4	271	4,961
1,500 - < 2,000	1	232	1,502
>= 2,000	7	2,686	44,745
總數 Total	60	3,930	59,327

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	19	43
5 - < 10	14	91
10 - < 20	24	351
20 - < 30	15	368
30 - < 40	16	556
40 - < 50	13	567
50 - < 60	15	829
60 - < 70	18	1,167
70 - < 80	12	895
80 - < 100	21	1,878
>= 100	142	187,520
總數 Total	309	194,265

(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	31	72
5 - < 10	12	83
10 - < 20	8	103
20 - < 30	4	104
30 - < 40	6	208
40 - < 50	4	177
50 - < 60	4	220
60 - < 70	3	189
70 - < 80	2	148
80 - < 100	3	262
>= 100	19	6,394
總數 Total	96	7,960

(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	50	115
5 - < 10	26	174
10 - < 20	32	454
20 - < 30	19	472
30 - < 40	22	764
40 - < 50	17	744
50 - < 60	19	1,049
60 - < 70	21	1,356
70 - < 80	14	1,043
80 - < 100	24	2,140
>= 100	161	193,914
總數 Total	405	202,225

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	494	261
1 - < 2	522	765
2 - < 10	1,503	7,588
10 - < 20	403	5,688
20 - < 30	152	3,725
30 - < 50	175	6,765
50 - < 100	197	13,879
>=100	242	211,727
總數 Total	3,688	250,398

(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	213	85
1 - < 2	95	138
2 - < 10	212	945
10 - < 20	50	677
20 - < 30	17	431
30 - < 50	21	790
50 - < 100	17	1,172
>=100	22	6,916
總數 Total	647	11,154

(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	707	346
1 - < 2	617	903
2 - < 10	1,715	8,533
10 - < 20	453	6,365
20 - < 30	169	4,156
30 - < 50	196	7,555
50 - < 100	214	15,051
>=100	264	218,643
總數 Total	4,335	261,552

註：統計數字乃根據截至 2012 年 12 月 31 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 31 December 2012 in respect of registered schemes.