

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 March 2013

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2013年3月31日，總共有5,206個職業退休計劃，包括4,328個職業退休註冊計劃及878個職業退休豁免計劃。在這5,206個職業退休計劃中，有3,948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 March 2013, there were 5,206 ORSO schemes, comprising of 4,328 ORSO registered schemes and 878 ORSO exempted schemes. Out of these 5,206 ORSO schemes 3,948 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	3,604 (91%)	344 (9%)	3,948 (100%)
沒有強積金豁免 Non-MPF Exempted	1,018 (81%)	240 (19%)	1,258 (100%)
總數 Total	4,622 (89%)	584 (11%)	5,206 (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%)	3,837 (97%)	84 (2%)	3,948 (100%)
沒有強積金豁免 Non-MPF Exempted	339 (27%)	823 (65%)	96 (8%)	1,258 (100%)
總數 Total	366 (7%)	4,660 (90%)	180 (3%)	5,206 (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	3,326 (84%)	622 (16%)	3,948 (100%)
沒有強積金豁免 Non-MPF Exempted	641 (51%)	617 (49%)	1,258 (100%)
總數 Total	3,967 (76%)	1,239 (24%)	5,206 (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	3,370 (92%)	308 (8%)	3,678 (100%)
沒有強積金豁免 Non-MPF Exempted	552 (85%)	98 (15%)	650 (100%)
總數 Total	3,922 (91%)	406 (9%)	4,328 (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	353,923 (98%)	6,828 (2%)	360,751 (100%)
沒有強積金豁免 Non-MPF Exempted	43,792 (99%)	393 (1%)	44,185 (100%)
總數 Total	397,715 (98%)	7,221 (2%)	404,936 (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	13,405 (78%)	3,715 (22%)	17,120 (100%)
沒有強積金豁免 Non-MPF Exempted	670 (78%)	194 (22%)	864 (100%)
總數 Total	14,075 (78%)	3,909 (22%)	17,984 (100%)

B. 截至 2013 年 3 月 31 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2013

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	3,678	650	4,328
豁免計劃 Exempted Schemes	270	608	878
總數 Total	3,948	1,258	5,206

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	1	8
總數 Total	7	1	8

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	102,527	3,272	124,469	180	226,996	3,452
(ii) 界定利益計劃 Defined Benefit Schemes	7,311	98	126,444	128	133,755	226
(iii) 總數 Total	109,838	3,370	250,913	308	360,751	3,678

(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	7,766	238	825	3	8,591	241
(ii) 界定利益計劃 Defined Benefit Schemes	264	5	0	0	264	5
(iii) 分項總數 Sub-total	8,030	243	825	3	8,855	246
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	10,237	304	19,064	81	29,301	385
(ii) 界定利益計劃 Defined Benefit Schemes	159	5	5,870	14	6,029	19
(iii) 分項總數 Sub-total	10,396	309	24,934	95	35,330	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)	18,003	542	19,889	84	37,892	626
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	423	10	5,870	14	6,293	24
(iii) 總數 Total	18,426	552	25,759	98	44,185	650

(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	7,766	238	825	3	8,591	241
(ii) 界定利益計劃 Defined Benefit Schemes	264	5	0	0	264	5
(iii) 分項總數 Sub-total	8,030	243	825	3	8,855	246
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	112,764	3,576	143,533	261	256,297	3,837
(ii) 界定利益計劃 Defined Benefit Schemes	7,470	103	132,314	142	139,784	245
(iii) 分項總數 Sub-total	120,234	3,679	275,847	403	396,081	4,082
(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)	120,530	3,814	144,358	264	264,888	4,078
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	7,734	108	132,314	142	140,048	250
(iii) 總數 Total	128,264	3,922	276,672	406	404,936	4,328

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	4,192	3,251	7,134	180	11,326	3,431
(ii) 界定利益計劃 Defined Benefit Schemes	337	97	5,457	128	5,794	225
(iii) 總數 Total	4,529	3,348	12,591	308	17,120	3,656

(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	48	236	14	3	62	239
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	48	241	14	3	62	244
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	109	300	638	79	747	379
(ii) 界定利益計劃 Defined Benefit Schemes	2	5	53	14	55	19
(iii) 分項總數 Sub-total	111	305	691	93	802	398
(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)	157	536	652	82	809	618
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	2	10	53	14	55	24
(iii) 總數 Total	159	546	705	96	864	642

(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	48	236	14	3	62	239
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	48	241	14	3	62	244
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,301	3,551	7,772	259	12,073	3,810
(ii) 界定利益計劃 Defined Benefit Schemes	339	102	5,510	142	5,849	244
(iii) 分項總數 Sub-total	4,640	3,653	13,282	401	17,922	4,054
(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)	4,349	3,787	7,786	262	12,135	4,049
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	339	107	5,510	142	5,849	249
(iii) 總數 Total	4,688	3,894	13,296	404	17,984	4,298

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	51,142	3,251	100,761	180	151,903	3,431
(ii) 界定利益計劃 Defined Benefit Schemes	5,254	97	93,195	128	98,449	225
(iii) 總數 Total	56,396	3,348	193,956	308	250,352	3,656

(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	1,031	236	126	3	1,157	239
(ii) 界定利益計劃 Defined Benefit Schemes	123	5	0	0	123	5
(iii) 分項總數 Sub-total	1,154	241	126	3	1,280	244
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,011	300	5,427	79	7,438	379
(ii) 界定利益計劃 Defined Benefit Schemes	29	5	2,454	14	2,483	19
(iii) 分項總數 Sub-total	2,040	305	7,881	93	9,921	398
(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)	3,042	536	5,553	82	8,595	618
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	152	10	2,454	14	2,606	24
(iii) 總數 Total	3,194	546	8,007	96	11,201	642

(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	1,031	236	126	3	1,157	239
(ii) 界定利益計劃 Defined Benefit Schemes	123	5	0	0	123	5
(iii) 分項總數 Sub-total	1,154	241	126	3	1,280	244
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	53,153	3,551	106,188	259	159,341	3,810
(ii) 界定利益計劃 Defined Benefit Schemes	5,283	102	95,649	142	100,932	244
(iii) 分項總數 Sub-total	58,436	3,653	201,837	401	260,273	4,054
(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)	54,184	3,787	106,314	262	160,498	4,049
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,406	107	95,649	142	101,055	249
(iii) 總數 Total	59,590	3,894	201,963	404	261,553	4,298

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	23	151
50 - < 100	4	29	317
100 - < 500	12	303	3,380
500 - < 1,000	4	68	2,807
1,000 - < 1,500	5	456	6,128
1,500 - < 2,000	0	0	0
>= 2,000	7	2,469	43,613
總數 Total	40	3,348	56,396

(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	84	186
50 - < 100	1	1	10
100 - < 500	9	123	495
500 - < 1,000	3	98	712
1,000 - < 1,500	5	45	299
1,500 - < 2,000	0	0	0
>= 2,000	6	195	1,492
總數 Total	43	546	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	107	337
50 - < 100	4	30	327
100 - < 500	13	426	3,875
500 - < 1,000	5	166	3,519
1,000 - < 1,500	5	501	6,427
1,500 - < 2,000	0	0	0
>= 2,000	7	2,664	45,105
總數 Total	60	3,894	59,590

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	46
5 - < 10	13	87
10 - < 20	24	351
20 - < 30	15	368
30 - < 40	17	595
40 - < 50	12	527
50 - < 60	15	831
60 - < 70	18	1,168
70 - < 80	12	895
80 - < 100	20	1,781
>= 100	143	187,307
總數 Total	308	193,956

(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	30	70
5 - < 10	12	83
10 - < 20	8	103
20 - < 30	5	133
30 - < 40	4	138
40 - < 50	5	224
50 - < 60	4	220
60 - < 70	3	189
70 - < 80	4	302
80 - < 100	2	178
>= 100	19	6,367
總數 Total	96	8,007

(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	49	116
5 - < 10	25	170
10 - < 20	32	454
20 - < 30	20	501
30 - < 40	21	733
40 - < 50	17	751
50 - < 60	19	1,051
60 - < 70	21	1,357
70 - < 80	16	1,197
80 - < 100	22	1,959
>= 100	162	193,674
總數 Total	404	201,963

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	481	258
1 - < 2	508	745
2 - < 10	1,494	7,524
10 - < 20	407	5,735
20 - < 30	152	3,713
30 - < 50	173	6,736
50 - < 100	198	13,953
>=100	243	211,688
總數 Total	3,656	250,352

(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	212	84
1 - < 2	92	133
2 - < 10	209	921
10 - < 20	50	674
20 - < 30	18	452
30 - < 50	21	802
50 - < 100	18	1,246
>=100	22	6,889
總數 Total	642	11,201

(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	693	342
1 - < 2	600	878
2 - < 10	1,703	8,445
10 - < 20	457	6,409
20 - < 30	170	4,165
30 - < 50	194	7,538
50 - < 100	216	15,199
>=100	265	218,577
總數 Total	4,298	261,553

註：統計數字乃根據截至2013年3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 March 2013 in respect of registered schemes.