

# 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2014年6月30日，總共有4,999個職業退休計劃，包括4,157個職業退休註冊計劃及842個職業退休豁免計劃。在這4,999個職業退休計劃中，有3,809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 June 2014, there were 4,999 ORSO schemes, comprising of 4,157 ORSO registered schemes and 842 ORSO exempted schemes. Out of these 4,999 ORSO schemes 3,809 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	3,481 (91%)	328 (9%)	3,809 (100%)
沒有強積金豁免 Non-MPF Exempted	957 (80%)	233 (20%)	1,190 (100%)
總數 Total	4,438 (89%)	561 (11%)	4,999 (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	25 (1%)	3,701 (97%)	83 (2%)	3,809 (100%)
沒有強積金豁免 Non-MPF Exempted	314 (26%)	770 (65%)	106 (9%)	1,190 (100%)
總數 Total	339 (7%)	4,471 (89%)	189 (4%)	4,999 (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	3,209 (84%)	600 (16%)	3,809 (100%)
沒有強積金豁免 Non-MPF Exempted	613 (52%)	577 (48%)	1,190 (100%)
總數 Total	3,822 (76%)	1,177 (24%)	4,999 (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	3,248 (92%)	299 (8%)	3,547 (100%)
沒有強積金豁免 Non-MPF Exempted	518 (85%)	92 (15%)	610 (100%)
總數 Total	3,766 (91%)	391 (9%)	4,157 (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	338,207 (97%)	11,146 (3%)	349,353 (100%)
沒有強積金豁免 Non-MPF Exempted	41,653 (97%)	1,107 (3%)	42,760 (100%)
總數 Total	379,860 (97%)	12,253 (3%)	392,113 (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	14,033 (79%)	3,706 (21%)	17,739 (100%)
沒有強積金豁免 Non-MPF Exempted	525 (72%)	201 (28%)	726 (100%)
總數 Total	14,558 (79%)	3,907 (21%)	18,465 (100%)

B. 截至 2014 年 6 月 30 日的 職業退休計劃統計數字  
**Statistics on ORSO Schemes as at 30 June 2014**

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	3,547	610	4,157
豁免計劃 Exempted Schemes	262	580	842
總數 Total	3,809	1,190	4,999

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	2	1	3
總數 Total	2	1	3

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
<b>受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	97,633	3,156	122,307	177	219,940	3,333
(ii) 界定利益計劃 Defined Benefit Schemes	6,593	92	122,820	122	129,413	214
(iii) 總數 Total	104,226	3,248	245,127	299	349,353	3,547

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	7,557	215	798	3	8,355	218
(ii) 界定利益計劃 Defined Benefit Schemes	246	5	0	0	246	5
(iii) 分項總數 Subtotal	7,803	220	798	3	8,601	223
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	9,595	292	18,775	75	28,370	367
(ii) 界定利益計劃 Defined Benefit Schemes	77	6	5,712	14	5,789	20
(iii) 分項總數 Subtotal	9,672	298	24,487	89	34,159	387
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	17,152	507	19,573	78	36,725	585
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	323	11	5,712	14	6,035	25
(iii) 總數 Total	17,475	518	25,285	92	42,760	610

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	7,557	215	798	3	8,355	218
(ii) 界定利益計劃 Defined Benefit Schemes	246	5	0	0	246	5
(iii) 分項總數 Subtotal	7,803	220	798	3	8,601	223
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	107,228	3,448	141,082	252	248,310	3,700
(ii) 界定利益計劃 Defined Benefit Schemes	6,670	98	128,532	136	135,202	234
(iii) 分項總數 Subtotal	113,898	3,546	269,614	388	383,512	3,934
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	114,785	3,663	141,880	255	256,665	3,918
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,916	103	128,532	136	135,448	239
(iii) 總數 Total	121,701	3,766	270,412	391	392,113	4,157

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
<b>受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	3,963	3,138	7,359	177	11,322	3,315
(ii) 界定利益計劃 Defined Benefit Schemes	314	91	6,103	121	6,417	212
(iii) 總數 Total	4,277	3,229	13,462	298	17,739	3,527



## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	45	214	13	3	58	217
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Subtotal	45	219	13	3	58	222
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	105	283	522	69	627	352
(ii) 界定利益計劃 Defined Benefit Schemes	3	6	38	14	41	20
(iii) 分項總數 Subtotal	108	289	560	83	668	372
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	150	497	535	72	685	569
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	11	38	14	41	25
(iii) 總數 Total	153	508	573	86	726	594

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	45	214	13	3	58	217
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Subtotal	45	219	13	3	58	222
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	4,068	3,421	7,881	246	11,949	3,667
(ii) 界定利益計劃 Defined Benefit Schemes	317	97	6,141	135	6,458	232
(iii) 分項總數 Subtotal	4,385	3,518	14,022	381	18,407	3,899
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	4,113	3,635	7,894	249	12,007	3,884
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	317	102	6,141	135	6,458	237
(iii) 總數 Total	4,430	3,737	14,035	384	18,465	4,121

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
<b>受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	54,319	3,138	112,888	177	167,207	3,315
(ii) 界定利益計劃 Defined Benefit Schemes	5,380	91	103,064	121	108,444	212
(iii) 總數 Total	59,699	3,229	215,952	298	275,651	3,527

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	1,037	214	153	3	1,190	217
(ii) 界定利益計劃 Defined Benefit Schemes	135	5	0	0	135	5
(iii) 分項總數 Subtotal	1,172	219	153	3	1,325	222
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	2,034	283	5,434	69	7,468	352
(ii) 界定利益計劃 Defined Benefit Schemes	46	6	2,780	14	2,826	20
(iii) 分項總數 Subtotal	2,080	289	8,214	83	10,294	372
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	3,071	497	5,587	72	8,658	569
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	181	11	2,780	14	2,961	25
(iii) 總數 Total	3,252	508	8,367	86	11,619	594

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	1,037	214	153	3	1,190	217
(ii) 界定利益計劃 Defined Benefit Schemes	135	5	0	0	135	5
(iii) 分項總數 Subtotal	1,172	219	153	3	1,325	222
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	56,353	3,421	118,322	246	174,675	3,667
(ii) 界定利益計劃 Defined Benefit Schemes	5,426	97	105,844	135	111,270	232
(iii) 分項總數 Subtotal	61,779	3,518	224,166	381	285,945	3,899
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	57,390	3,635	118,475	249	175,865	3,884
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,561	102	105,844	135	111,405	237
(iii) 總數 Total	62,951	3,737	224,319	384	287,270	4,121

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	22	169
50 - < 100	4	29	321
100 - < 500	11	288	3,001
500 - < 1,000	5	68	3,544
1,000 - < 1,500	5	434	6,266
1,500 - < 2,000	0	0	0
>= 2,000	7	2,388	46,398
<b>總數 Total</b>	40	3,229	59,699

(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	18	80	177
50 - < 100	2	1	11
100 - < 500	9	115	515
500 - < 1,000	3	84	719
1,000 - < 1,500	5	43	295
1,500 - < 2,000	0	0	0
>= 2,000	6	185	1,535
<b>總數 Total</b>	43	508	3,252

(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	25	102	346
50 - < 100	4	30	332
100 - < 500	12	403	3,516
500 - < 1,000	6	152	4,263
1,000 - < 1,500	5	477	6,561
1,500 - < 2,000	0	0	0
>= 2,000	7	2,573	47,933
<b>總數 Total</b>	59	3,737	62,951

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	18	42
5 - < 10	15	102
10 - < 20	20	305
20 - < 30	10	262
30 - < 40	17	588
40 - < 50	9	408
50 - < 60	9	483
60 - < 70	17	1,129
70 - < 80	12	887
80 - < 100	21	1,844
>= 100	150	209,902
<b>總數 Total</b>	298	215,952

(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	25	54
5 - < 10	12	77
10 - < 20	8	121
20 - < 30	2	51
30 - < 40	5	167
40 - < 50	3	129
50 - < 60	6	335
60 - < 70	3	192
70 - < 80	4	296
80 - < 100	1	89
>= 100	17	6,856
<b>總數 Total</b>	86	8,367

(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	43	96
5 - < 10	27	179
10 - < 20	28	426
20 - < 30	12	313
30 - < 40	22	755
40 - < 50	12	537
50 - < 60	15	818
60 - < 70	20	1,321
70 - < 80	16	1,183
80 - < 100	22	1,933
>= 100	167	216,758
<b>總數 Total</b>	384	224,319



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	424	230
1 - < 2	475	709
2 - < 10	1,442	7,422
10 - < 20	410	5,740
20 - < 30	152	3,742
30 - < 50	165	6,433
50 - < 100	200	14,085
>=100	259	237,290
<b>總數 Total</b>	<b>3,527</b>	<b>275,651</b>

(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	194	78
1 - < 2	83	121
2 - < 10	192	845
10 - < 20	51	727
20 - < 30	15	386
30 - < 50	20	769
50 - < 100	19	1,299
>=100	20	7,394
<b>總數 Total</b>	<b>594</b>	<b>11,619</b>

(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	618	308
1 - < 2	558	830
2 - < 10	1,634	8,267
10 - < 20	461	6,467
20 - < 30	167	4,128
30 - < 50	185	7,202
50 - < 100	219	15,384
>=100	279	244,684
<b>總數 Total</b>	<b>4,121</b>	<b>287,270</b>

註：統計數字乃根據截至2014年6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 June 2014 in respect of registered schemes.