

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2015年3月31日，總共有4,843個職業退休計劃，包括4,079個職業退休註冊計劃及764個職業退休豁免計劃。在這4,843個職業退休計劃中，有3,733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 2015, there were 4,843 ORSO schemes, comprising of 4,079 ORSO registered schemes and 764 ORSO exempted schemes. Out of these 4,843 ORSO schemes 3,733 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	3,413 (91%)	320 (9%)	3,733 (100%)
沒有強積金豁免 Non-MPF Exempted	911 (82%)	199 (18%)	1,110 (100%)
總數 Total	4,324 (89%)	519 (11%)	4,843 (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%)	3,626 (97%)	82 (2%)	3,733 (100%)
沒有強積金豁免 Non-MPF Exempted	291 (26%)	736 (66%)	83 (7%)	1,110 (100%)*
總數 Total	316 (7%)	4,362 (90%)	165 (3%)	4,843 (100%)

* 因四捨五入的關係，各項百分比的總和未必等同總計數字。

Percentage may not sum up to the total due to rounding.

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	3,467 (93%)	266 (7%)	3,733 (100%)
沒有強積金豁免 Non-MPF Exempted	664 (60%)	446 (40%)	1,110 (100%)
總數 Total	4,131 (85%)	712 (15%)	4,843 (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	3,185 (92%)	293 (8%)	3,478 (100%)
沒有強積金豁免 Non-MPF Exempted	503 (84%)	98 (16%)	601 (100%)
總數 Total	3,688 (90%)	391 (10%)	4,079 (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	331,952 (98%)	8,469 (2%)	340,421 (100%)
沒有強積金豁免 Non-MPF Exempted	41,163 (97%)	1,230 (3%)	42,393 (100%)
總數 Total	373,115 (97%)	9,699 (3%)	382,814 (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	13,803 (79%)	3,734 (21%)	17,537 (100%)
沒有強積金豁免 Non-MPF Exempted	514 (76%)	164 (24%)	678 (100%)
總數 Total	14,317 (79%)	3,898 (21%)	18,215 (100%)

B. 截至 2015 年 3 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2015

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	3,478	601	4,079
豁免計劃 Exempted Schemes	255	509	764
總數 Total	3,733	1,110	4,843

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	10	5	15
總數 Total	10	5	15

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	90,154	3,095	121,759	174	211,913	3,269
(ii) 界定利益計劃 Defined Benefit Schemes	6,419	90	122,089	119	128,508	209
(iii) 總數 Total	96,573	3,185	243,848	293	340,421	3,478

(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	7,658	211	846	3	8,504	214
(ii) 界定利益計劃 Defined Benefit Schemes	203	4	0	0	203	4
(iii) 分項總數 Subtotal	7,861	215	846	3	8,707	218
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	9,218	283	19,086	82	28,304	365
(ii) 界定利益計劃 Defined Benefit Schemes	139	5	5,243	13	5,382	18
(iii) 分項總數 Subtotal	9,357	288	24,329	95	33,686	383
(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)	16,876	494	19,932	85	36,808	579
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	342	9	5,243	13	5,585	22
(iii) 總數 Total	17,218	503	25,175	98	42,393	601

(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	7,658	211	846	3	8,504	214
(ii) 界定利益計劃 Defined Benefit Schemes	203	4	0	0	203	4
(iii) 分項總數 Subtotal	7,861	215	846	3	8,707	218
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	99,372	3,378	140,845	256	240,217	3,634
(ii) 界定利益計劃 Defined Benefit Schemes	6,558	95	127,332	132	133,890	227
(iii) 分項總數 Subtotal	105,930	3,473	268,177	388	374,107	3,861
(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)	107,030	3,589	141,691	259	248,721	3,848
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,761	99	127,332	132	134,093	231
(iii) 總數 Total	113,791	3,688	269,023	391	382,814	4,079

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	3,965	3,068	7,662	174	11,627	3,242
(ii) 界定利益計劃 Defined Benefit Schemes	298	87	5,612	117	5,910	204
(iii) 總數 Total	4,263	3,155	13,274	291	17,537	3,446

(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	45	210	15	3	60	213
(ii) 界定利益計劃 Defined Benefit Schemes	1	4	0	0	1	4
(iii) 分項總數 Subtotal	46	214	15	3	61	217
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	125	278	460	67	585	345
(ii) 界定利益計劃 Defined Benefit Schemes	3	5	29	12	32	17
(iii) 分項總數 Subtotal	128	283	489	79	617	362
(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)	170	488	475	70	645	558
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4	9	29	12	33	21
(iii) 總數 Total	174	497	504	82	678	579

(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	45	210	15	3	60	213
(ii) 界定利益計劃 Defined Benefit Schemes	1	4	0	0	1	4
(iii) 分項總數 Subtotal	46	214	15	3	61	217
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,090	3,346	8,122	241	12,212	3,587
(ii) 界定利益計劃 Defined Benefit Schemes	301	92	5,641	129	5,942	221
(iii) 分項總數 Subtotal	4,391	3,438	13,763	370	18,154	3,808
(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)	4,135	3,556	8,137	244	12,272	3,800
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	302	96	5,641	129	5,943	225
(iii) 總數 Total	4,437	3,652	13,778	373	18,215	4,025

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	56,693	3,068	122,543	174	179,236	3,242
(ii) 界定利益計劃 Defined Benefit Schemes	5,284	87	97,482	117	102,766	204
(iii) 總數 Total	61,977	3,155	220,025	291	282,002	3,446

(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	210	172	3	1,211	213
(ii) 界定利益計劃 Defined Benefit Schemes	129	4	0	0	129	4
(iii) 分項總數 Subtotal	1,168	214	172	3	1,340	217
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,136	278	5,371	67	7,507	345
(ii) 界定利益計劃 Defined Benefit Schemes	29	5	2,781	12	2,810	17
(iii) 分項總數 Subtotal	2,165	283	8,152	79	10,317	362
(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)	3,175	488	5,543	70	8,718	558
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	158	9	2,781	12	2,939	21
(iii) 總數 Total	3,333	497	8,324	82	11,657	579

(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	210	172	3	1,211	213
(ii) 界定利益計劃 Defined Benefit Schemes	129	4	0	0	129	4
(iii) 分項總數 Subtotal	1,168	214	172	3	1,340	217
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	58,829	3,346	127,914	241	186,743	3,587
(ii) 界定利益計劃 Defined Benefit Schemes	5,313	92	100,263	129	105,576	221
(iii) 分項總數 Subtotal	64,142	3,438	228,177	370	292,319	3,808
(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)	59,868	3,556	128,086	244	187,954	3,800
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,442	96	100,263	129	105,705	225
(iii) 總數 Total	65,310	3,652	228,349	373	293,659	4,025

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	20	182
50 - < 100	2	6	122
100 - < 500	13	301	3,327
500 - < 1,000	4	60	2,683
1,000 - < 1,500	5	400	5,906
1,500 - < 2,000	1	30	1,504
>= 2,000	7	2,338	48,253
總數 Total	40	3,155	61,977

(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	83	194
50 - < 100	1	1	10
100 - < 500	10	113	521
500 - < 1,000	3	83	816
1,000 - < 1,500	4	37	224
1,500 - < 2,000	1	3	34
>= 2,000	6	177	1,534
總數 Total	44	497	3,333

(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	103	376
50 - < 100	2	7	132
100 - < 500	14	414	3,848
500 - < 1,000	5	143	3,499
1,000 - < 1,500	5	437	6,130
1,500 - < 2,000	1	33	1,538
>= 2,000	7	2,515	49,787
總數 Total	60	3,652	65,310

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	21	43
5 - < 10	18	128
10 - < 20	13	196
20 - < 30	17	428
30 - < 40	12	408
40 - < 50	10	446
50 - < 60	13	716
60 - < 70	9	586
70 - < 80	13	966
80 - < 100	22	1,978
>= 100	143	214,130
總數 Total	291	220,025

(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	60
5 - < 10	9	65
10 - < 20	8	112
20 - < 30	2	47
30 - < 40	7	240
40 - < 50	3	136
50 - < 60	3	171
60 - < 70	3	202
70 - < 80	4	301
80 - < 100	3	247
>= 100	15	6,743
總數 Total	82	8,324

(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	46	103
5 - < 10	27	193
10 - < 20	21	308
20 - < 30	19	475
30 - < 40	19	648
40 - < 50	13	582
50 - < 60	16	887
60 - < 70	12	788
70 - < 80	17	1,267
80 - < 100	25	2,225
>= 100	158	220,873
總數 Total	373	228,349

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	411	224
1 - < 2	433	644
2 - < 10	1,398	7,202
10 - < 20	412	5,678
20 - < 30	165	4,010
30 - < 50	169	6,480
50 - < 100	201	14,180
>=100	257	243,584
總數 Total	3,446	282,002

(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	187	75
1 - < 2	77	111
2 - < 10	192	854
10 - < 20	49	685
20 - < 30	14	339
30 - < 50	22	827
50 - < 100	19	1,389
>=100	19	7,377
總數 Total	579	11,657

(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	598	299
1 - < 2	510	755
2 - < 10	1,590	8,056
10 - < 20	461	6,363
20 - < 30	179	4,349
30 - < 50	191	7,307
50 - < 100	220	15,569
>=100	276	250,961
總數 Total	4,025	293,659

註：統計數字乃根據截至2015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 2015 in respect of registered schemes.