

職業退休計劃統計數字

ORSO SCHEMES STATISTICS

統計數字

Statistics

- A. 職業退休計劃統計數字概要
ORSO Schemes Statistical Highlights
- B. 截至2019年9月30日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 September 2019

A. 職業退休計劃統計數字概要 ORSO Schemes Statistical Highlights

截至2019年9月30日，總共有4,077個職業退休計劃，包括3,505個職業退休註冊計劃及572個職業退休豁免計劃。在這4,077個職業退休計劃中，有3,159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 2019, there were 4,077 ORSO schemes, comprising of 3,505 ORSO registered schemes and 572 ORSO exempted schemes. Out of these 4,077 ORSO schemes 3,159 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	2,897 (92%)	262 (8%)	3,159 (100%)
沒有強積金豁免 Non-MPF Exempted	771 (84%)	147 (16%)	918 (100%)
總數 Total	3,668 (90%)	409 (10%)	4,077 (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	19 (1%)	3,066 (97%)	74 (2%)	3,159 (100%)
沒有強積金豁免 Non-MPF Exempted	216 (24%)	639 (70%)	63 (7%)	918 (100%)*
總數 Total	235 (6%)	3,705 (91%)	137 (3%)	4,077 (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	2,952 (93%)	207 (7%)	3,159 (100%)
沒有強積金豁免 Non-MPF Exempted	594 (65%)	324 (35%)	918 (100%)
總數 Total	3,546 (87%)	531 (13%)	4,077 (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	2,701 (91%)	255 (9%)	2,956 (100%)
沒有強積金豁免 Non-MPF Exempted	426 (78%)	123 (22%)	549 (100%)
總數 Total	3,127 (89%)	378 (11%)	3,505 (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	308,870 (99%)	2,501 (1%)	311,371 (100%)
沒有強積金豁免 Non-MPF Exempted	45,232 (97%)	1,367 (3%)	46,599 (100%)
總數 Total	354,102 (99%)	3,868 (1%)	357,970 (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	16,280 (78%)	4,605 (22%)	20,885 (100%)
沒有強積金豁免 Non-MPF Exempted	785 (62%)	490 (38%)	1,275 (100%)
總數 Total	17,065 (77%)	5,095 (23%)	22,160 (100%)

B. 截至 2019 年 9 月 30 日的 職業 退休 計劃 統計 數字
Statistics on ORSO Schemes as at 30 September 2019

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	2,956	549	3,505
豁 免 計 劃 Exempted Schemes	203	369	572
總 數 Total	3,159	918	4,077

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	1	0	1
受 信 託 所 管 限 Governed by Trust	6	2	8
總 數 Total	7	2	9

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	61,824	2,627	134,613	156	196,437	2,783
(ii) 界定利益計劃 Defined Benefit Schemes	4,868	74	110,066	99	114,934	173
(iii) 總數 Total	66,692	2,701	244,679	255	311,371	2,956

(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	7,777	164	1,395	2	9,172	166
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,914	166	1,395	2	9,309	168
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	8,046	255	23,463	111	31,509	366
(ii) 界定利益計劃 Defined Benefit Schemes	283	5	5,498	10	5,781	15
(iii) 分項總數 Subtotal	8,329	260	28,961	121	37,290	381
(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)	15,823	419	24,858	113	40,681	532
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	420	7	5,498	10	5,918	17
(iii) 總數 Total	16,243	426	30,356	123	46,599	549

(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	7,777	164	1,395	2	9,172	166
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,914	166	1,395	2	9,309	168
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	69,870	2,882	158,076	267	227,946	3,149
(ii) 界定利益計劃 Defined Benefit Schemes	5,151	79	115,564	109	120,715	188
(iii) 分項總數 Subtotal	75,021	2,961	273,640	376	348,661	3,337
(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)	77,647	3,046	159,471	269	237,118	3,315
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,288	81	115,564	109	120,852	190
(iii) 總數 Total	82,935	3,127	275,035	378	357,970	3,505

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	3,341	2,584	10,387	155	13,728	2,739
(ii) 界定利益計劃 Defined Benefit Schemes	318	70	6,839	98	7,157	168
(iii) 總數 Total	3,659	2,654	17,226	253	20,885	2,907

(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	38	161	28	2	66	163
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	38	163	28	2	66	165
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	143	250	980	89	1,123	339
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	83	10	86	14
(iii) 分項總數 Subtotal	146	254	1,063	99	1,209	353
(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)	181	411	1,008	91	1,189	502
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	6	83	10	86	16
(iii) 總數 Total	184	417	1,091	101	1,275	518

(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	38	161	28	2	66	163
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	38	163	28	2	66	165
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,484	2,834	11,367	244	14,851	3,078
(ii) 界定利益計劃 Defined Benefit Schemes	321	74	6,922	108	7,243	182
(iii) 分項總數 Subtotal	3,805	2,908	18,289	352	22,094	3,260
(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)	3,522	2,995	11,395	246	14,917	3,241
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	321	76	6,922	108	7,243	184
(iii) 總數 Total	3,843	3,071	18,317	354	22,160	3,425

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	50,575	2,584	156,010	155	206,585	2,739
(ii) 界定利益計劃 Defined Benefit Schemes	4,531	70	102,287	98	106,818	168
(iii) 總數 Total	55,106	2,654	258,297	253	313,403	2,907

(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	913	161	292	2	1,205	163
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	1,012	163	292	2	1,304	165
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,120	250	9,154	89	11,274	339
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	2,950	10	2,978	14
(iii) 分項總數 Subtotal	2,148	254	12,104	99	14,252	353
(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)	3,033	411	9,446	91	12,479	502
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	127	6	2,950	10	3,077	16
(iii) 總數 Total	3,160	417	12,396	101	15,556	518

(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	913	161	292	2	1,205	163
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	1,012	163	292	2	1,304	165
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	52,695	2,834	165,164	244	217,859	3,078
(ii) 界定利益計劃 Defined Benefit Schemes	4,559	74	105,237	108	109,796	182
(iii) 分項總數 Subtotal	57,254	2,908	270,401	352	327,655	3,260
(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)	53,608	2,995	165,456	246	219,064	3,241
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,658	76	105,237	108	109,895	184
(iii) 總數 Total	58,266	3,071	270,693	354	328,959	3,425

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	5	14	81
50 - < 100	6	10	379
100 - < 500	12	237	3,493
500 - < 1,000	4	202	3,060
1,000 - < 1,500	4	197	5,063
1,500 - < 2,000	0	0	0
>= 2,000	7	1,994	43,030
總數 Total	38	2,654	55,106

(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	16	55	107
50 - < 100	1	4	10
100 - < 500	9	98	664
500 - < 1,000	5	94	875
1,000 - < 1,500	3	8	82
1,500 - < 2,000	0	0	0
>= 2,000	7	158	1,422
總數 Total	41	417	3,160

(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	20	69	188
50 - < 100	6	14	389
100 - < 500	14	335	4,157
500 - < 1,000	5	296	3,935
1,000 - < 1,500	4	205	5,145
1,500 - < 2,000	0	0	0
>= 2,000	7	2,152	44,452
總數 Total	56	3,071	58,266

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	15	26
5 - < 10	13	88
10 - < 20	11	159
20 - < 30	15	382
30 - < 40	11	376
40 - < 50	11	495
50 - < 60	10	558
60 - < 70	8	526
70 - < 80	10	748
80 - < 100	11	1,007
> = 100	138	253,932
總數 Total	253	258,297

(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	28	36
5 - < 10	11	72
10 - < 20	16	213
20 - < 30	5	129
30 - < 40	5	170
40 - < 50	2	90
50 - < 60	1	52
60 - < 70	4	260
70 - < 80	3	225
80 - < 100	3	275
> = 100	23	10,874
總數 Total	101	12,396

(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	62
5 - < 10	24	160
10 - < 20	27	372
20 - < 30	20	511
30 - < 40	16	546
40 - < 50	13	585
50 - < 60	11	610
60 - < 70	12	786
70 - < 80	13	973
80 - < 100	14	1,282
> = 100	161	264,806
總數 Total	354	270,693

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	326	160
1 - < 2	324	483
2 - < 10	1,124	5,727
10 - < 20	410	5,734
20 - < 30	169	4,121
30 - < 50	149	5,851
50 - < 100	168	11,828
> =100	237	279,499
總數 Total	2,907	313,403

(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	164	54
1 - < 2	71	101
2 - < 10	152	680
10 - < 20	50	701
20 - < 30	17	417
30 - < 50	18	684
50 - < 100	17	1,234
> =100	29	11,685
總數 Total	518	15,556

(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	490	214
1 - < 2	395	584
2 - < 10	1,276	6,407
10 - < 20	460	6,435
20 - < 30	186	4,538
30 - < 50	167	6,535
50 - < 100	185	13,062
> =100	266	291,184
總數 Total	3,425	328,959

註：統計數字乃根據截至2019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 2019 in respect of registered schemes.