

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2009年6月30日，總共有7,116個職業退休計劃，包括5,030個職業退休註冊計劃及2,086個職業退休豁免計劃。在這7,116個職業退休計劃中，有4,543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 2009, there were 7,116 ORSO schemes, comprising of 5,030 ORSO registered schemes and 2,086 ORSO exempted schemes. Out of these 7,116 ORSO schemes 4,543 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	4,156 (91%)	387 (9%)	4,543 (100%)
沒有強積金豁免 Non-MPF Exempted	1,680 (65%)	893 (35%)	2,573 (100%)
總數 Total	5,836 (82%)	1,280 (18%)	7,116 (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	31 (1%)	4,415 (97%)	97 (2%)	4,543 (100%)
沒有強積金豁免 Non-MPF Exempted	521 (20%)	1,771 (69%)	281 (11%)	2,573 (100%)
總數 Total	552 (8%)	6,186 (87%)	378 (5%)	7,116 (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	3,798 (84%)	745 (16%)	4,543 (100%)
沒有強積金豁免 Non-MPF Exempted	821 (32%)	1,752 (68%)	2,573 (100%)
總數 Total	4,619 (65%)	2,497 (35%)	7,116 (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	3,883 (92%)	341 (8%)	4,224 (100%)
沒有強積金豁免 Non-MPF Exempted	686 (85%)	120 (15%)	806 (100%)
總數 Total	4,569 (91%)	461 (9%)	5,030 (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	404,483 (98%)	9,545 (2%)	414,028 (100%)
沒有強積金豁免 Non-MPF Exempted	45,955 (97%)	1,547 (3%)	47,502 (100%)
總數 Total	450,438 (98%)	11,092 (2%)	461,530 (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	11,164 (77%)	3,263 (23%)	14,427 (100%)
沒有強積金豁免 Non-MPF Exempted	669 (81%)	157 (19%)	826 (100%)
總數 Total	11,833 (78%)	3,420 (22%)	15,253 (100%)

B. 截至 2009 年 6 月 30 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 June 2009

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	4,224	806	5,030
豁免計劃 Exempted Schemes	319	1,767	2,086
總數 Total	4,543	2,573	7,116

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	10	1	11
總數 Total	11	1	12

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	139,655	3,774	131,736	199	271,391	3,973
(ii) 界定利益計劃 Defined Benefit Schemes	10,359	109	132,278	142	142,637	251
(iii) 總數 Total	150,014	3,883	264,014	341	414,028	4,224

(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	9,392	310	806	4	10,198	314
(ii) 界定利益計劃 Defined Benefit Schemes	372	5	0	0	372	5
(iii) 分項總數 Sub-total	9,764	315	806	4	10,570	319
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	13,329	365	16,665	98	29,994	463
(ii) 界定利益計劃 Defined Benefit Schemes	122	6	6,816	18	6,938	24
(iii) 分項總數 Sub-total	13,451	371	23,481	116	36,932	487
(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)	22,721	675	17,471	102	40,192	777
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	494	11	6,816	18	7,310	29
(iii) 總數 Total	23,215	686	24,287	120	47,502	806

(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	9,392	310	806	4	10,198	314
(ii) 界定利益計劃 Defined Benefit Schemes	372	5	0	0	372	5
(iii) 分項總數 Sub-total	9,764	315	806	4	10,570	319
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	152,984	4,139	148,401	297	301,385	4,436
(ii) 界定利益計劃 Defined Benefit Schemes	10,481	115	139,094	160	149,575	275
(iii) 分項總數 Sub-total	163,465	4,254	287,495	457	450,960	4,711
(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)	162,376	4,449	149,207	301	311,583	4,750
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	10,853	120	139,094	160	149,947	280
(iii) 總數 Total	173,229	4,569	288,301	461	461,530	5,030

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	4,064	3,690	6,063	195	10,127	3,885
(ii) 界定利益計劃 Defined Benefit Schemes	297	107	4,003	141	4,300	248
(iii) 總數 Total	4,361	3,797	10,066	336	14,427	4,133

(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	35	304	16	4	51	308
(ii) 界定利益計劃 Defined Benefit Schemes	5	5	0	0	5	5
(iii) 分項總數 Sub-total	40	309	16	4	56	313
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	84	354	517	86	601	440
(ii) 界定利益計劃 Defined Benefit Schemes	1	6	168	18	169	24
(iii) 分項總數 Sub-total	85	360	685	104	770	464
(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)	119	658	533	90	652	748
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6	11	168	18	174	29
(iii) 總數 Total	125	669	701	108	826	777

(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	35	304	16	4	51	308
(ii) 界定利益計劃 Defined Benefit Schemes	5	5	0	0	5	5
(iii) 分項總數 Sub-total	40	309	16	4	56	313
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,148	4,044	6,580	281	10,728	4,325
(ii) 界定利益計劃 Defined Benefit Schemes	298	113	4,171	159	4,469	272
(iii) 分項總數 Sub-total	4,446	4,157	10,751	440	15,197	4,597
(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)	4,183	4,348	6,596	285	10,779	4,633
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	303	118	4,171	159	4,474	277
(iii) 總數 Total	4,486	4,466	10,767	444	15,253	4,910

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	49,765	3,690	88,494	195	138,259	3,885
(ii) 界定利益計劃 Defined Benefit Schemes	6,629	107	99,306	141	105,935	248
(iii) 總數 Total	56,394	3,797	187,800	336	244,194	4,133

(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	1,289	304	111	4	1,400	308
(ii) 界定利益計劃 Defined Benefit Schemes	205	5	0	0	205	5
(iii) 分項總數 Sub-total	1,494	309	111	4	1,605	313
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,133	354	5,093	86	7,226	440
(ii) 界定利益計劃 Defined Benefit Schemes	39	6	2,704	18	2,743	24
(iii) 分項總數 Sub-total	2,172	360	7,797	104	9,969	464
(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)	3,422	658	5,204	90	8,626	748
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	244	11	2,704	18	2,948	29
(iii) 總數 Total	3,666	669	7,908	108	11,574	777

(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	1,289	304	111	4	1,400	308
(ii) 界定利益計劃 Defined Benefit Schemes	205	5	0	0	205	5
(iii) 分項總數 Sub-total	1,494	309	111	4	1,605	313
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	51,898	4,044	93,587	281	145,485	4,325
(ii) 界定利益計劃 Defined Benefit Schemes	6,668	113	102,010	159	108,678	272
(iii) 分項總數 Sub-total	58,566	4,157	195,597	440	254,163	4,597
(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)	53,187	4,348	93,698	285	146,885	4,633
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,873	118	102,010	159	108,883	277
(iii) 總數 Total	60,060	4,466	195,708	444	255,768	4,910

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	7	17	107
50 - < 100	8	80	539
100 - < 500	11	356	3,341
500 - < 1,000	6	240	4,742
1,000 - < 1,500	2	104	2,255
1,500 - < 2,000	0	0	0
>= 2,000	9	3,000	45,410
總數 Total	43	3,797	56,394

(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	95	205
50 - < 100	5	29	115
100 - < 500	8	131	511
500 - < 1,000	4	123	905
1,000 - < 1,500	2	11	113
1,500 - < 2,000	0	0	0
>= 2,000	8	280	1,817
總數 Total	45	669	3,666

(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	23	112	312
50 - < 100	9	109	654
100 - < 500	12	487	3,852
500 - < 1,000	7	363	5,647
1,000 - < 1,500	2	115	2,368
1,500 - < 2,000	0	0	0
>= 2,000	9	3,280	47,227
總數 Total	62	4,466	60,060

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	25	77
5 - < 10	11	85
10 - < 20	24	328
20 - < 30	23	564
30 - < 40	19	637
40 - < 50	13	589
50 - < 60	13	711
60 - < 70	16	1,057
70 - < 80	14	1,049
80 - < 100	14	1,249
>= 100	164	181,454
總數 Total	336	187,800

(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	43	94
5 - < 10	15	106
10 - < 20	5	73
20 - < 30	4	106
30 - < 40	6	207
40 - < 50	5	233
50 - < 60	5	284
60 - < 70	2	123
70 - < 80	1	70
80 - < 100	4	373
>= 100	18	6,239
總數 Total	108	7,908

(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	68	171
5 - < 10	26	191
10 - < 20	29	401
20 - < 30	27	670
30 - < 40	25	844
40 - < 50	18	822
50 - < 60	18	995
60 - < 70	18	1,180
70 - < 80	15	1,119
80 - < 100	18	1,622
>= 100	182	187,693
總數 Total	444	195,708

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	630	343
1 - < 2	650	952
2 - < 10	1,636	8,042
10 - < 20	429	5,982
20 - < 30	163	4,056
30 - < 50	184	7,226
50 - < 100	177	12,184
>=100	264	205,409
總數 Total	4,133	244,194

(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	266	100
1 - < 2	125	185
2 - < 10	253	1,155
10 - < 20	53	742
20 - < 30	20	489
30 - < 50	21	801
50 - < 100	17	1,164
>=100	22	6,938
總數 Total	777	11,574

(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	896	443
1 - < 2	775	1,137
2 - < 10	1,889	9,197
10 - < 20	482	6,724
20 - < 30	183	4,545
30 - < 50	205	8,027
50 - < 100	194	13,348
>=100	286	212,347
總數 Total	4,910	255,768

註：統計數字乃根據截至 2009 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 2009 in respect of registered schemes.