

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2017年9月30日，總共有4,431個職業退休計劃，包括3,795個職業退休註冊計劃及636個職業退休豁免計劃。在這4,431個職業退休計劃中，有3,437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 2017, there were 4,431 ORSO schemes, comprising of 3,795 ORSO registered schemes and 636 ORSO exempted schemes. Out of these 4,431 ORSO schemes 3,437 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	3,154 (92%)	283 (8%)	3,437 (100%)
沒有強積金豁免 Non-MPF Exempted	833 (84%)	161 (16%)	994 (100%)
總數 Total	3,987 (90%)	444 (10%)	4,431 (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	22 (1%)	3,338 (97%)	77 (2%)	3,437 (100%)
沒有強積金豁免 Non-MPF Exempted	243 (24%)	677 (68%)	74 (7%)	994 (100%)*
總數 Total	265 (6%)	4,015 (91%)	151 (3%)	4,431 (100%)

*因四捨五入的關係，百分比的總和未必等同總計數字。

Percentages may not sum up to 100% 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	3,215 (94%)	222 (6%)	3,437 (100%)
沒有強積金豁免 Non-MPF Exempted	627 (63%)	367 (37%)	994 (100%)
總數 Total	3,842 (87%)	589 (13%)	4,431 (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	2,944 (91%)	277 (9%)	3,221 (100%)
沒有強積金豁免 Non-MPF Exempted	455 (79%)	119 (21%)	574 (100%)
總數 Total	3,399 (90%)	396 (10%)	3,795 (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	325,137 (98%)	5,475 (2%)	330,612 (100%)
沒有強積金豁免 Non-MPF Exempted	40,697 (98%)	961 (2%)	41,658 (100%)
總數 Total	365,834 (98%)	6,436 (2%)	372,270 (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	16,630 (79%)	4,413 (21%)	21,043 (100%)
沒有強積金豁免 Non-MPF Exempted	663 (65%)	360 (35%)	1,023 (100%)
總數 Total	17,293 (78%)	4,773 (22%)	22,066 (100%)

B. 截至 2017 年 9 月 30 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 September 2017

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	3,221	574	3,795
豁免計劃 Exempted Schemes	216	420	636
總數 Total	3,437	994	4,431

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	1	0	1
總數 Total	1	0	1

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	70,486	2,864	138,601	168	209,087	3,032
(ii) 界定利益計劃 Defined Benefit Schemes	5,489	80	116,036	109	121,525	189
(iii) 總數 Total	75,975	2,944	254,637	277	330,612	3,221

(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	7,958	185	1,239	2	9,197	187
(ii) 界定利益計劃 Defined Benefit Schemes	164	2	0	0	164	2
(iii) 分項總數 Subtotal	8,122	187	1,239	2	9,361	189
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	8,070	264	19,088	106	27,158	370
(ii) 界定利益計劃 Defined Benefit Schemes	106	4	5,033	11	5,139	15
(iii) 分項總數 Subtotal	8,176	268	24,121	117	32,297	385
(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)	16,028	449	20,327	108	36,355	557
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	270	6	5,033	11	5,303	17
(iii) 總數 Total	16,298	455	25,360	119	41,658	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

	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	7,958	185	1,239	2	9,197	187
(ii) 界定利益計劃 Defined Benefit Schemes	164	2	0	0	164	2
(iii) 分項總數 Subtotal	8,122	187	1,239	2	9,361	189
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	78,556	3,128	157,689	274	236,245	3,402
(ii) 界定利益計劃 Defined Benefit Schemes	5,595	84	121,069	120	126,664	204
(iii) 分項總數 Subtotal	84,151	3,212	278,758	394	362,909	3,606
(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)	86,514	3,313	158,928	276	245,442	3,589
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,759	86	121,069	120	126,828	206
(iii) 總數 Total	92,273	3,399	279,997	396	372,270	3,795

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	3,496	2,854	9,934	168	13,430	3,022
(ii) 界定利益計劃 Defined Benefit Schemes	319	78	7,294	109	7,613	187
(iii) 總數 Total	3,815	2,932	17,228	277	21,043	3,209

(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	42	183	21	2	63	185
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	42	185	21	2	63	187
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	142	254	737	83	879	337
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	78	11	81	15
(iii) 分項總數 Subtotal	145	258	815	94	960	352
(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)	184	437	758	85	942	522
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	6	78	11	81	17
(iii) 總數 Total	187	443	836	96	1,023	539

(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	42	183	21	2	63	185
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	42	185	21	2	63	187
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,638	3,108	10,671	251	14,309	3,359
(ii) 界定利益計劃 Defined Benefit Schemes	322	82	7,372	120	7,694	202
(iii) 分項總數 Subtotal	3,960	3,190	18,043	371	22,003	3,561
(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)	3,680	3,291	10,692	253	14,372	3,544
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	322	84	7,372	120	7,694	204
(iii) 總數 Total	4,002	3,375	18,064	373	22,066	3,748

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	50,531	2,854	139,496	168	190,027	3,022
(ii) 界定利益計劃 Defined Benefit Schemes	4,897	78	103,672	109	108,569	187
(iii) 總數 Total	55,428	2,932	243,168	277	298,596	3,209

(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	947	183	203	2	1,150	185
(ii) 界定利益計劃 Defined Benefit Schemes	106	2	0	0	106	2
(iii) 分項總數 Subtotal	1,053	185	203	2	1,256	187
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,085	254	6,597	83	8,682	337
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	2,731	11	2,759	15
(iii) 分項總數 Subtotal	2,113	258	9,328	94	11,441	352
(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)	3,032	437	6,800	85	9,832	522
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	134	6	2,731	11	2,865	17
(iii) 總數 Total	3,166	443	9,531	96	12,697	539

(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	947	183	203	2	1,150	185
(ii) 界定利益計劃 Defined Benefit Schemes	106	2	0	0	106	2
(iii) 分項總數 Subtotal	1,053	185	203	2	1,256	187
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	52,616	3,108	146,093	251	198,709	3,359
(ii) 界定利益計劃 Defined Benefit Schemes	4,925	82	106,403	120	111,328	202
(iii) 分項總數 Subtotal	57,541	3,190	252,496	371	310,037	3,561
(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)	53,563	3,291	146,296	253	199,859	3,544
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,031	84	106,403	120	111,434	204
(iii) 總數 Total	58,594	3,375	252,699	373	311,293	3,748

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	7	14	90
50 - < 100	6	29	399
100 - < 500	10	247	3,031
500 - < 1,000	5	92	3,492
1,000 - < 1,500	4	341	4,759
1,500 - < 2,000	1	30	1,647
>= 2,000	6	2,179	42,010
總數 Total	39	2,932	55,428

(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	50	105
50 - < 100	4	28	135
100 - < 500	7	93	470
500 - < 1,000	4	78	784
1,000 - < 1,500	4	31	198
1,500 - < 2,000	1	3	29
>= 2,000	6	160	1,445
總數 Total	42	443	3,166

(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	22	64	195
50 - < 100	8	57	534
100 - < 500	11	340	3,501
500 - < 1,000	6	170	4,276
1,000 - < 1,500	4	372	4,957
1,500 - < 2,000	1	33	1,676
>= 2,000	6	2,339	43,455
總數 Total	58	3,375	58,594

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	20	32
5 - < 10	12	88
10 - < 20	12	172
20 - < 30	13	331
30 - < 40	15	520
40 - < 50	13	580
50 - < 60	9	498
60 - < 70	15	964
70 - < 80	11	821
80 - < 100	16	1,438
>= 100	141	237,724
總數 Total	277	243,168

(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	37	53
5 - < 10	11	74
10 - < 20	7	103
20 - < 30	3	75
30 - < 40	4	134
40 - < 50	3	134
50 - < 60	5	278
60 - < 70	4	256
70 - < 80	2	155
80 - < 100	2	187
>= 100	18	8,082
總數 Total	96	9,531

(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	57	85
5 - < 10	23	162
10 - < 20	19	275
20 - < 30	16	406
30 - < 40	19	654
40 - < 50	16	714
50 - < 60	14	776
60 - < 70	19	1,220
70 - < 80	13	976
80 - < 100	18	1,625
>= 100	159	245,806
總數 Total	373	252,699

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	397	202
1 - < 2	364	535
2 - < 10	1,275	6,478
10 - < 20	429	6,004
20 - < 30	152	3,707
30 - < 50	168	6,595
50 - < 100	182	12,781
>=100	242	262,294
總數 Total	3,209	298,596

(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	178	64
1 - < 2	71	103
2 - < 10	173	759
10 - < 20	40	574
20 - < 30	16	388
30 - < 50	21	818
50 - < 100	18	1,311
>=100	22	8,680
總數 Total	539	12,697

(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	575	266
1 - < 2	435	638
2 - < 10	1,448	7,237
10 - < 20	469	6,578
20 - < 30	168	4,095
30 - < 50	189	7,413
50 - < 100	200	14,092
>=100	264	270,974
總數 Total	3,748	311,293

註：統計數字乃根據截至 2017 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 2017 in respect of registered schemes.