

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2017年12月31日的職業退休計劃統計數字

Statistics on ORSO Schemes as at 31 December 2017

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2017年12月31日，總共有4,394個職業退休計劃，包括3,766個職業退休註冊計劃及628個職業退休豁免計劃。在這4,394個職業退休計劃中，有3,406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 December 2017, there were 4,394 ORSO schemes, comprising of 3,766 ORSO registered schemes and 628 ORSO exempted schemes. Out of these 4,394 ORSO schemes 3,406 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	3,127 (92%)	279 (8%)	3,406 (100%)
沒有強積金豁免 Non-MPF Exempted	828 (84%)	160 (16%)	988 (100%)
總數 Total	3,955 (90%)	439 (10%)	4,394 (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	21 (1%)	3,310 (97%)	75 (2%)	3,406 (100%)
沒有強積金豁免 Non-MPF Exempted	238 (24%)	678 (69%)	72 (7%)	988 (100%)
總數 Total	259 (6%)	3,988 (91%)	147 (3%)	4,394 (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	3,189 (94%)	217 (6%)	3,406 (100%)
沒有強積金豁免 Non-MPF Exempted	623 (63%)	365 (37%)	988 (100%)
總數 Total	3,812 (87%)	582 (13%)	4,394 (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	2,919 (91%)	276 (9%)	3,195 (100%)
沒有強積金豁免 Non-MPF Exempted	453 (79%)	118 (21%)	571 (100%)
總數 Total	3,372 (90%)	394 (10%)	3,766 (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	323,496 (98%)	5,525 (2%)	329,021 (100%)
沒有強積金豁免 Non-MPF Exempted	41,268 (97%)	1,131 (3%)	42,399 (100%)
總數 Total	364,764 (98%)	6,656 (2%)	371,420 (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	16,717 (79%)	4,406 (21%)	21,122 (100%)
沒有強積金豁免 Non-MPF Exempted	1,094 (70%)	465 (30%)	1,559 (100%)
總數 Total	17,811 (79%)	4,871 (21%)	22,681 (100%)

B. 截至 2017 年 12 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 December 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	3,195	571	3,766
豁免計劃 Exempted Schemes	211	417	628
總數 Total	3,406	988	4,394

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	3	1	4
總數 Total	3	1	4

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	69,754	2,841	138,229	167	207,983	3,008
(ii) 界定利益計劃 Defined Benefit Schemes	5,447	78	115,591	109	121,038	187
(iii) 總數 Total	75,201	2,919	253,820	276	329,021	3,195

(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	7,946	181	1,239	2	9,185	183
(ii) 界定利益計劃 Defined Benefit Schemes	164	2	0	0	164	2
(iii) 分項總數 Subtotal	8,110	183	1,239	2	9,349	185
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	7,910	266	19,792	105	27,702	371
(ii) 界定利益計劃 Defined Benefit Schemes	106	4	5,242	11	5,348	15
(iii) 分項總數 Subtotal	8,016	270	25,034	116	33,050	386
(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)	15,856	447	21,031	107	36,887	554
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	270	6	5,242	11	5,512	17
(iii) 總數 Total	16,126	453	26,273	118	42,399	571

(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	7,946	181	1,239	2	9,185	183
(ii) 界定利益計劃 Defined Benefit Schemes	164	2	0	0	164	2
(iii) 分項總數 Subtotal	8,110	183	1,239	2	9,349	185
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	77,664	3,107	158,021	272	235,685	3,379
(ii) 界定利益計劃 Defined Benefit Schemes	5,553	82	120,833	120	126,386	202
(iii) 分項總數 Subtotal	83,217	3,189	278,854	392	362,071	3,581
(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)	85,610	3,288	159,260	274	244,870	3,562
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,717	84	120,833	120	126,550	204
(iii) 總數 Total	91,327	3,372	280,093	394	371,420	3,766

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	3,464	2,829	9,940	167	13,404	2,996
(ii) 界定利益計劃 Defined Benefit Schemes	319	76	7,399	109	7,718	185
(iii) 總數 Total	3,783	2,905	17,339	276	21,122	3,181

(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	179	21	2	63	181
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	42	181	21	2	63	183
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	162	260	1,252	96	1,414	356
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	79	11	82	15
(iii) 分項總數 Subtotal	165	264	1,331	107	1,496	371
(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)	204	439	1,273	98	1,477	537
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	6	79	11	82	17
(iii) 總數 Total	207	445	1,352	109	1,559	554

(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	179	21	2	63	181
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	42	181	21	2	63	183
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,626	3,089	11,192	263	14,818	3,352
(ii) 界定利益計劃 Defined Benefit Schemes	322	80	7,478	120	7,800	200
(iii) 分項總數 Subtotal	3,948	3,169	18,670	383	22,618	3,552
(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)	3,668	3,268	11,213	265	14,881	3,533
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	322	82	7,478	120	7,800	202
(iii) 總數 Total	3,990	3,350	18,691	385	22,681	3,735

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	50,947	2,829	140,344	167	191,291	2,996
(ii) 界定利益計劃 Defined Benefit Schemes	4,681	76	105,358	109	110,039	185
(iii) 總數 Total	55,628	2,905	245,702	276	301,330	3,181

(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	946	179	203	2	1,149	181
(ii) 界定利益計劃 Defined Benefit Schemes	106	2	0	0	106	2
(iii) 分項總數 Subtotal	1,052	181	203	2	1,255	183
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,138	260	7,543	96	9,681	356
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	2,854	11	2,882	15
(iii) 分項總數 Subtotal	2,166	264	10,397	107	12,563	371
(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)	3,084	439	7,746	98	10,830	537
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	134	6	2,854	11	2,988	17
(iii) 總數 Total	3,218	445	10,600	109	13,818	554

(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	946	179	203	2	1,149	181
(ii) 界定利益計劃 Defined Benefit Schemes	106	2	0	0	106	2
(iii) 分項總數 Subtotal	1,052	181	203	2	1,255	183
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	53,085	3,089	147,887	263	200,972	3,352
(ii) 界定利益計劃 Defined Benefit Schemes	4,709	80	108,212	120	112,921	200
(iii) 分項總數 Subtotal	57,794	3,169	256,099	383	313,893	3,552
(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)	54,031	3,268	148,090	265	202,121	3,533
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,815	82	108,212	120	113,027	202
(iii) 總數 Total	58,846	3,350	256,302	385	315,148	3,735

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	6	13	85
50 - < 100	7	30	459
100 - < 500	10	242	3,025
500 - < 1,000	5	92	3,543
1,000 - < 1,500	4	337	4,757
1,500 - < 2,000	1	30	1,744
>= 2,000	6	2,161	42,015
總數 Total	39	2,905	55,628

(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	48	103
50 - < 100	3	22	68
100 - < 500	8	101	582
500 - < 1,000	4	77	775
1,000 - < 1,500	4	32	202
1,500 - < 2,000	1	4	31
>= 2,000	6	161	1,457
總數 Total	42	445	3,218

(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	21	61	188
50 - < 100	8	52	527
100 - < 500	12	343	3,607
500 - < 1,000	6	169	4,318
1,000 - < 1,500	4	369	4,959
1,500 - < 2,000	1	34	1,775
>= 2,000	6	2,322	43,472
總數 Total	58	3,350	58,846

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	173
20 - < 30	13	337
30 - < 40	14	485
40 - < 50	14	619
50 - < 60	8	441
60 - < 70	15	953
70 - < 80	12	906
80 - < 100	14	1,256
>= 100	142	240,412
總數 Total	276	245,702

(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	41	52
5 - < 10	12	83
10 - < 20	10	138
20 - < 30	6	141
30 - < 40	3	96
40 - < 50	3	126
50 - < 60	4	226
60 - < 70	6	380
70 - < 80	2	155
80 - < 100	1	97
>= 100	21	9,106
總數 Total	109	10,600

(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	61	84
5 - < 10	24	171
10 - < 20	22	311
20 - < 30	19	478
30 - < 40	17	581
40 - < 50	17	745
50 - < 60	12	667
60 - < 70	21	1,333
70 - < 80	14	1,061
80 - < 100	15	1,353
>= 100	163	249,518
總數 Total	385	256,302

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	380	196
1 - <2	361	529
2 - <10	1,269	6,451
10 - <20	429	6,008
20 - <30	152	3,712
30 - <50	168	6,607
50 - <100	180	12,673
>=100	242	265,154
總數 Total	3,181	301,330

(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	184	63
1 - <2	71	102
2 - <10	176	786
10 - <20	41	587
20 - <30	19	454
30 - <50	18	678
50 - <100	20	1,434
>=100	25	9,714
總數 Total	554	13,818

(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	564	259
1 - <2	432	631
2 - <10	1,445	7,237
10 - <20	470	6,595
20 - <30	171	4,166
30 - <50	186	7,285
50 - <100	200	14,107
>=100	267	274,868
總數 Total	3,735	315,148

註：統計數字乃根據截至 2017 年 12 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 December 2017 in respect of registered schemes.