

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2020年9月30日，總共有3,947個職業退休計劃，包括3,404個職業退休註冊計劃及543個職業退休豁免計劃。在這3,947個職業退休計劃中，有3,071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 2020, there were 3,947 ORSO schemes, comprising of 3,404 ORSO registered schemes and 543 ORSO exempted schemes. Out of these 3,947 ORSO schemes 3,071 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	2,815 (92%)	256 (8%)	3,071 (100%)
沒有強積金豁免 Non-MPF Exempted	737 (84%)	139 (16%)	876 (100%)
總數 Total	3,552 (90%)	395 (10%)	3,947 (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	17 (1%)	2,981 (97%)	73 (2%)	3,071 (100%)
沒有強積金豁免 Non-MPF Exempted	204 (23%)	609 (70%)	63 (7%)	876 (100%)
總數 Total	221 (6%)	3,590 (91%)	136 (3%)	3,947 (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	2,873 (94%)	198 (6%)	3,071 (100%)
沒有強積金豁免 Non-MPF Exempted	566 (65%)	310 (35%)	876 (100%)
總數 Total	3,439 (87%)	508 (13%)	3,947 (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	2,629 (91%)	246 (9%)	2,875 (100%)
沒有強積金豁免 Non-MPF Exempted	411 (78%)	118 (22%)	529 (100%)
總數 Total	3,040 (89%)	364 (11%)	3,404 (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	298,607 (98%)	5,796 (2%)	304,403 (100%)
沒有強積金豁免 Non-MPF Exempted	39,512 (97%)	1,315 (3%)	40,827 (100%)
總數 Total	338,119 (98%)	7,111 (2%)	345,230 (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	17,334 (78%)	4,797 (22%)	22,131 (100%)
沒有強積金豁免 Non-MPF Exempted	1,475 (76%)	463 (24%)	1,938 (100%)
總數 Total	18,809 (78%)	5,260 (22%)	24,069 (100%)

B. 截至 2020 年 9 月 30 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 September 2020

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	2,875	529	3,404
豁免計劃 Exempted Schemes	196	347	543
總數 Total	3,071	876	3,947

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	6	1	7
總數 Total	6	1	7

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	57,817	2,558	133,194	148	191,011	2,706
(ii) 界定利益計劃 Defined Benefit Schemes	5,373	71	108,019	98	113,392	169
(iii) 總數 Total	63,190	2,629	241,213	246	304,403	2,875

(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	7,163	154	796	2	7,959	156
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,300	156	796	2	8,096	158
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	9,997	249	16,787	106	26,784	355
(ii) 界定利益計劃 Defined Benefit Schemes	306	6	5,641	10	5,947	16
(iii) 分項總數 Subtotal	10,303	255	22,428	116	32,731	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)	17,160	403	17,583	108	34,743	511
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	443	8	5,641	10	6,084	18
(iii) 總數 Total	17,603	411	23,224	118	40,827	529

(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	7,163	154	796	2	7,959	156
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,300	156	796	2	8,096	158
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	67,814	2,807	149,981	254	217,795	3,061
(ii) 界定利益計劃 Defined Benefit Schemes	5,679	77	113,660	108	119,339	185
(iii) 分項總數 Subtotal	73,493	2,884	263,641	362	337,134	3,246
(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)	74,977	2,961	150,777	256	225,754	3,217
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,816	79	113,660	108	119,476	187
(iii) 總數 Total	80,793	3,040	264,437	364	345,230	3,404

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	3,092	2,541	11,072	147	14,164	2,688
(ii) 界定利益計劃 Defined Benefit Schemes	323	70	7,644	97	7,967	167
(iii) 總數 Total	3,415	2,611	18,716	244	22,131	2,855

(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	44	152	24	2	68	154
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	44	154	24	2	68	156
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	356	243	1,425	85	1,781	328
(ii) 界定利益計劃 Defined Benefit Schemes	6	6	83	10	89	16
(iii) 分項總數 Subtotal	362	249	1,508	95	1,870	344
(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)	400	395	1,449	87	1,849	482
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6	8	83	10	89	18
(iii) 總數 Total	406	403	1,532	97	1,938	500

(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	44	152	24	2	68	154
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	44	154	24	2	68	156
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,448	2,784	12,497	232	15,945	3,016
(ii) 界定利益計劃 Defined Benefit Schemes	329	76	7,727	107	8,056	183
(iii) 分項總數 Subtotal	3,777	2,860	20,224	339	24,001	3,199
(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)	3,492	2,936	12,521	234	16,013	3,170
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	329	78	7,727	107	8,056	185
(iii) 總數 Total	3,821	3,014	20,248	341	24,069	3,355

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	49,385	2,541	155,172	147	204,557	2,688
(ii) 界定利益計劃 Defined Benefit Schemes	4,430	70	108,386	97	112,816	167
(iii) 總數 Total	53,815	2,611	263,558	244	317,373	2,855

(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	853	152	330	2	1,183	154
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	952	154	330	2	1,282	156
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,956	243	10,037	85	13,993	328
(ii) 界定利益計劃 Defined Benefit Schemes	456	6	3,290	10	3,746	16
(iii) 分項總數 Subtotal	4,412	249	13,327	95	17,739	344
(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)	4,809	395	10,367	87	15,176	482
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	555	8	3,290	10	3,845	18
(iii) 總數 Total	5,364	403	13,657	97	19,021	500

(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	853	152	330	2	1,183	154
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	952	154	330	2	1,282	156
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	53,341	2,784	165,209	232	218,550	3,016
(ii) 界定利益計劃 Defined Benefit Schemes	4,886	76	111,676	107	116,562	183
(iii) 分項總數 Subtotal	58,227	2,860	276,885	339	335,112	3,199
(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)	54,194	2,936	165,539	234	219,733	3,170
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,985	78	111,676	107	116,661	185
(iii) 總數 Total	59,179	3,014	277,215	341	336,394	3,355

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	16	159
50 - < 100	4	8	255
100 - < 500	11	235	3,214
500 - < 1,000	4	171	2,928
1,000 - < 1,500	3	182	3,737
1,500 - < 2,000	1	27	1,945
>= 2,000	7	1,972	41,577
總數 Total	37	2,611	53,815

(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	15	48	89
50 - < 100	1	4	8
100 - < 500	10	96	1,032
500 - < 1,000	4	89	775
1,000 - < 1,500	3	8	85
1,500 - < 2,000	1	4	32
>= 2,000	7	154	3,343
總數 Total	41	403	5,364

(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	64	248
50 - < 100	4	12	263
100 - < 500	14	331	4,246
500 - < 1,000	5	260	3,703
1,000 - < 1,500	3	190	3,822
1,500 - < 2,000	1	31	1,977
>= 2,000	7	2,126	44,920
總數 Total	55	3,014	59,179

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	17	30
5 - < 10	10	72
10 - < 20	18	283
20 - < 30	10	245
30 - < 40	9	316
40 - < 50	7	313
50 - < 60	11	596
60 - < 70	7	459
70 - < 80	9	673
80 - < 100	11	1,002
>= 100	135	259,569
總數 Total	244	263,558

(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	22	22
5 - < 10	15	110
10 - < 20	15	206
20 - < 30	5	128
30 - < 40	2	71
40 - < 50	3	128
50 - < 60	2	107
60 - < 70	3	186
70 - < 80	3	231
80 - < 100	1	81
>= 100	26	12,387
總數 Total	97	13,657

(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)
<5	39	52
5 - < 10	25	182
10 - < 20	33	489
20 - < 30	15	373
30 - < 40	11	387
40 - < 50	10	441
50 - < 60	13	703
60 - < 70	10	645
70 - < 80	12	904
80 - < 100	12	1,083
> = 100	161	271,956
總數 Total	341	277,215

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	311	152
1 - < 2	305	456
2 - < 10	1,115	5,670
10 - < 20	420	5,873
20 - < 30	160	3,870
30 - < 50	146	5,757
50 - < 100	166	11,761
>=100	232	283,834
總數 Total	2,855	317,373

(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	142	43
1 - < 2	81	115
2 - < 10	143	654
10 - < 20	47	664
20 - < 30	22	548
30 - < 50	15	560
50 - < 100	15	1,037
>=100	35	15,400
總數 Total	500	19,021

(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	453	195
1 - < 2	386	571
2 - < 10	1,258	6,324
10 - < 20	467	6,537
20 - < 30	182	4,418
30 - < 50	161	6,317
50 - < 100	181	12,798
>=100	267	299,234
總數 Total	3,355	336,394

註：統計數字乃根據截至2020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 2020 in respect of registered schemes.