

職業退休計劃統計數字

ORSO SCHEMES STATISTICS

統計數字

Statistics

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Statistics on ORSO Schemes as at 31 March 2005

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2005年3月31日，總共有7,913個職業退休計劃，包括5,887個職業退休註冊計劃及2,026個職業退休豁免計劃。在這7,913個職業退休計劃中，有5,261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 March 2005, there were 7,913 ORSO schemes, comprising of 5,887 ORSO registered schemes and 2,026 ORSO exempted schemes. Out of these 7,913 ORSO schemes 5,261 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	4,814 (92%)	447 (8%)	5,261 (100%)
沒有強積金豁免 Non-MPF Exempted	1,815 (68%)	837 (32%)	2,652 (100%)
總數 Total	6,629 (84%)	1,284 (16%)	7,913 (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	40 (1%)	5,105 (97%)	116 (2%)	5,261 (100%)
沒有強積金豁免 Non-MPF Exempted	602 (23%)	1,789 (67%)	261 (10%)	2,652 (100%)
總數 Total	642 (8%)	6,894 (87%)	377 (5%)	7,913 (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	4,373 (83%)	888 (17%)	5,261 (100%)
沒有強積金豁免 Non-MPF Exempted	965 (36%)	1,687 (64%)	2,652 (100%)
總數 Total	5,338 (67%)	2,575 (33%)	7,913 (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	4,491 (92%)	371 (8%)	4,862 (100%)
沒有強積金豁免 Non-MPF Exempted	884 (86%)	141 (14%)	1,025 (100%)
總數 Total	5,375 (91%)	512 (9%)	5,887 (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	495,567 (99%)	3,905 (1%)	499,472 (100%)
沒有強積金豁免 Non-MPF Exempted	56,549 (97%)	1,989 (3%)	58,538 (100%)
總數 Total	552,116 (99%)	5,894 (1%)	558,010 (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	13,215 (80%)	3,347 (20%)	16,562 (100%)
沒有強積金豁免 Non-MPF Exempted	521 (78%)	145 (22%)	666 (100%)
總數 Total	13,736 (80%)	3,492 (20%)	17,228 (100%)

B. 截至 2005 年 3 月 31 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2005

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	4,862	1,025	5,887
豁免計劃 Exempted Schemes	399	1,627	2,026
總數 Total	5,261	2,652	7,913

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	36	2	38
總數 Total	36	2	38

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	198,533	4,370	150,567	215	349,100	4,585
(ii) 界定利益計劃 Defined Benefit Schemes	12,615	121	137,757	156	150,372	277
(iii) 總數 Total	211,148	4,491	288,324	371	499,472	4,862

(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	7,815	393	795	2	8,610	395
(ii) 界定利益計劃 Defined Benefit Schemes	54	5	0	0	54	5
(iii) 分項總數 Subtotal	7,869	398	795	2	8,664	400
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	21,891	477	19,324	119	41,215	596
(ii) 界定利益計劃 Defined Benefit Schemes	810	9	7,849	20	8,659	29
(iii) 分項總數 Subtotal	22,701	486	27,173	139	49,874	625
(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)	29,706	870	20,119	121	49,825	991
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	864	14	7,849	20	8,713	34
(iii) 總數 Total	30,570	884	27,968	141	58,538	1,025

(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	7,815	393	795	2	8,610	395
(ii) 界定利益計劃 Defined Benefit Schemes	54	5	0	0	54	5
(iii) 分項總數 Subtotal	7,869	398	795	2	8,664	400
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	220,424	4,847	169,891	334	390,315	5,181
(ii) 界定利益計劃 Defined Benefit Schemes	13,425	130	145,606	176	159,031	306
(iii) 分項總數 Subtotal	233,849	4,977	315,497	510	549,346	5,487
(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)	228,239	5,240	170,686	336	398,925	5,576
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	13,479	135	145,606	176	159,085	311
(iii) 總數 Total	241,718	5,375	316,292	512	558,010	5,887

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	4,719	4,361	5,640	209	10,359	4,570
(ii) 界定利益計劃 Defined Benefit Schemes	395	120	5,808	152	6,203	272
(iii) 總數 Total	5,114	4,481	11,448	361	16,562	4,842

(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	43	390	9	2	52	392
(ii) 界定利益計劃 Defined Benefit Schemes	2	5	0	0	2	5
(iii) 分項總數 Subtotal	45	395	9	2	54	397
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	88	464	355	110	443	574
(ii) 界定利益計劃 Defined Benefit Schemes	5	9	164	19	169	28
(iii) 分項總數 Subtotal	93	473	519	129	612	602
(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)	131	854	364	112	495	966
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	7	14	164	19	171	33
(iii) 總數 Total	138	868	528	131	666	999

(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	43	390	9	2	52	392
(ii) 界定利益計劃 Defined Benefit Schemes	2	5	0	0	2	5
(iii) 分項總數 Subtotal	45	395	9	2	54	397
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,807	4,825	5,995	319	10,802	5,144
(ii) 界定利益計劃 Defined Benefit Schemes	400	129	5,972	171	6,372	300
(iii) 分項總數 Subtotal	5,207	4,954	11,967	490	17,174	5,444
(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)	4,850	5,215	6,004	321	10,854	5,536
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	402	134	5,972	171	6,374	305
(iii) 總數 Total	5,252	5,349	11,976	492	17,228	5,841

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	41,574	4,361	56,516	209	98,090	4,570
(ii) 界定利益計劃 Defined Benefit Schemes	4,148	120	67,576	152	71,724	272
(iii) 總數 Total	45,722	4,481	124,092	361	169,814	4,842

(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	910	390	68	2	978	392
(ii) 界定利益計劃 Defined Benefit Schemes	42	5	0	0	42	5
(iii) 分項總數 Subtotal	952	395	68	2	1,020	397
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,678	464	3,594	110	6,272	574
(ii) 界定利益計劃 Defined Benefit Schemes	146	9	2,127	19	2,273	28
(iii) 分項總數 Subtotal	2,824	473	5,721	129	8,545	602
(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)	3,588	854	3,662	112	7,250	966
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	188	14	2,127	19	2,315	33
(iii) 總數 Total	3,776	868	5,789	131	9,565	999

(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	910	390	68	2	978	392
(ii) 界定利益計劃 Defined Benefit Schemes	42	5	0	0	42	5
(iii) 分項總數 Subtotal	952	395	68	2	1,020	397
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	44,252	4,825	60,110	319	104,362	5,144
(ii) 界定利益計劃 Defined Benefit Schemes	4,294	129	69,703	171	73,997	300
(iii) 分項總數 Subtotal	48,546	4,954	129,813	490	178,359	5,444
(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)	45,162	5,215	60,178	321	105,340	5,536
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,336	134	69,703	171	74,039	305
(iii) 總數 Total	49,498	5,349	129,881	492	179,379	5,841

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	12	37	266
50 - < 100	6	69	438
100 - < 500	11	341	2,820
500 - < 1,000	6	436	3,979
1,000 - < 1,500	2	118	2,007
1,500 - < 2,000	2	294	3,593
>= 2,000	7	3,186	32,619
總數 Total	46	4,481	45,722

(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	21	106	181
50 - < 100	9	74	258
100 - < 500	9	292	698
500 - < 1,000	4	34	120
1,000 - < 1,500	2	16	149
1,500 - < 2,000	2	11	100
>= 2,000	6	335	2,270
總數 Total	53	868	3,776

(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	28	143	447
50 - < 100	9	143	696
100 - < 500	13	633	3,518
500 - < 1,000	6	470	4,099
1,000 - < 1,500	2	134	2,156
1,500 - < 2,000	2	305	3,693
>= 2,000	7	3,521	34,889
總數 Total	67	5,349	49,498

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	32	80
5 - < 10	22	167
10 - < 20	39	565
20 - < 30	26	628
30 - < 40	24	832
40 - < 50	23	1,057
50 - < 60	16	861
60 - < 70	9	573
70 - < 80	13	972
80 - < 100	17	1,480
>= 100	140	116,877
總數 Total	361	124,092

(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	65	126
5 - < 10	14	89
10 - < 20	6	92
20 - < 30	4	101
30 - < 40	4	146
40 - < 50	7	314
50 - < 60	7	386
60 - < 70	6	393
70 - < 80	4	298
80 - < 100	2	196
>= 100	12	3,648
總數 Total	131	5,789

(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	97	206
5 - < 10	36	256
10 - < 20	45	657
20 - < 30	30	729
30 - < 40	28	978
40 - < 50	30	1,371
50 - < 60	23	1,247
60 - < 70	15	966
70 - < 80	17	1,270
80 - < 100	19	1,676
>= 100	152	120,525
總數 Total	492	129,881

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	1,055	559
1 - < 2	859	1,251
2 - < 10	1,826	8,574
10 - < 20	396	5,582
20 - < 30	168	4,036
30 - < 50	182	7,164
50 - < 100	146	10,320
>=100	210	132,328
總數 Total	4,842	169,814

(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	391	152
1 - < 2	174	253
2 - < 10	301	1,349
10 - < 20	51	745
20 - < 30	20	463
30 - < 50	23	911
50 - < 100	24	1,605
>=100	15	4,087
總數 Total	999	9,565

(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	1,446	711
1 - < 2	1,033	1,504
2 - < 10	2,127	9,923
10 - < 20	447	6,327
20 - < 30	188	4,499
30 - < 50	205	8,075
50 - < 100	170	11,925
>=100	225	136,415
總數 Total	5,841	179,379

註：統計數字乃根據截至 2005 年 3 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 as at 31 March 2005 in respect of registered schemes.