

## 7.5 RETIREMENT SCHEMES STATISTICS

### Statistics

- A. Retirement Schemes Statistical Highlights
- B. Statistics on Retirement Schemes as at 30 September 2000

#### A. Retirement Schemes Statistical Highlights

As at 30 September 2000, there were 16,089 registered schemes and 2,041 exempted schemes. The following statistics are compiled to give a more comprehensive picture of the characteristics of these schemes.

##### Number of Schemes by Benefit Type

Defined Contribution Schemes	Defined Benefit Schemes	Total
16,713 (92%)	1,417 (8%)	18,130 (100%)

##### Number of Schemes by Scheme Arrangement

Regulated by Insurance Arrangement	Governed by Trust	Others	Total
5,328 (29%)	12,429 (69%)	373 (2%)	18,130 (100%)

##### Number of Schemes by Domicile

Hong Kong Domiciled	Offshore	Total
14,043 (77%)	4,087 (23%)	18,130 (100%)

##### Number of Registered Schemes by Pooling Arrangement

Pooled Schemes	Non-Pooled Schemes	Total
15,374 (96%)	715 (4%)	16,089 (100%)

Number of Scheme Members for Registered Schemes

HKID Card Holder	Non-HKID Card Holder	Total
870,055 (99%)	6,872 (1%)	876,927 (100%)

Contribution Amount by Employers and Employees (HK\$m) (Note)

Employers' Contributions	Employees' Contributions	Total
17,463 (76%)	5,530 (24%)	22,993 (100%)

Note: These statistics are compiled on the basis of the latest annual returns filed with MPFA in respect of 14,708 registered schemes.

**B. Statistics on Retirement Schemes as at 30 September 2000**

The following statistics are compiled on a quarterly basis.

Scheme Type	No. of Schemes
Registered Schemes	16,089
Exempted Schemes	2,041
<b>Total</b>	<b>18,130</b>

***Number of Schemes Newly Registered During the Quarter***

Scheme Arrangement	No. of Schemes		
	Pooled Schemes	Non-Pooled Schemes	Total
Regulated by Insurance Arrangement	44	1	45
Governed by Trust	48	16	64
<b>Total</b>	<b>92</b>	<b>17</b>	<b>109</b>

***Statistics on Registered Schemes - by Set-up Status***

Set-Up Status	No. of Schemes	No. of Scheme Members
Existing Schemes	7,130	626,985
Proposed Schemes	8,959	249,942
<b>Total</b>	<b>16,089</b>	<b>876,927</b>

**Membership Size of Registered Schemes - by Scheme Arrangement and by Benefit Type**

	Pooled Schemes		Non-Pooled Schemes		Total	
	No. of Members	No. of Schemes	No. of Members	No. of Schemes	No. of Members	No. of Schemes
<b>(A) Regulated by Insurance Arrangement</b>						
(i) Defined Contribution Schemes	79,789	5,040	522	8	<b>80,311</b>	<b>5,048</b>
(ii) Defined Benefit Schemes	1,081	23	198	3	<b>1,279</b>	<b>26</b>
(iii) <b>Subtotal</b>	<b>80,870</b>	<b>5,063</b>	<b>720</b>	<b>11</b>	<b>81,590</b>	<b>5,074</b>
<b>(B) Governed by Trust</b>						
(i) Defined Contribution Schemes	394,144	10,140	192,342	434	<b>586,486</b>	<b>10,574</b>
(ii) Defined Benefit Schemes	19,310	171	189,541	270	<b>208,851</b>	<b>441</b>
(iii) <b>Subtotal</b>	<b>413,454</b>	<b>10,311</b>	<b>381,883</b>	<b>704</b>	<b>795,337</b>	<b>11,015</b>
<b>(C) Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust</b>						
(i) Defined Contribution Schemes (A)(i)+(B)(i)	473,933	15,180	192,864	442	<b>666,797</b>	<b>15,622</b>
(ii) Defined Benefit Schemes (A)(ii)+(B)(ii)	20,391	194	189,739	273	<b>210,130</b>	<b>467</b>
(iii) <b>Total</b>	<b>494,324</b>	<b>15,374</b>	<b>382,603</b>	<b>715</b>	<b>876,927</b>	<b>16,089</b>

**Contribution Amount of Registered Schemes - by Scheme Arrangement  
and by Benefit Type\***

	Pooled Schemes		Non-Pooled Schemes		Total	
	Amount HK\$m	No. of Schemes	Amount HK\$m	No. of Schemes	Amount HK\$m	No. of Schemes
<b>(A) Regulated by Insurance Arrangement</b>						
(i) Defined Contribution Schemes	1,338	4,484	13	6	1,351	4,490
(ii) Defined Benefit Schemes	34	22	9	3	43	25
(iii) <b>Subtotal</b>	<b>1,372</b>	<b>4,506</b>	<b>22</b>	<b>9</b>	<b>1,394</b>	<b>4,515</b>
<b>(B) Governed by Trust</b>						
(i) Defined Contribution Schemes	7,599	9,415	5,963	362	13,562	9,777
(ii) Defined Benefit Schemes	486	159	7,551	257	8,037	416
(iii) <b>Subtotal</b>	<b>8,085</b>	<b>9,574</b>	<b>13,514</b>	<b>619</b>	<b>21,599</b>	<b>10,193</b>
<b>(C) Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust</b>						
(i) Defined Contribution Schemes (A)(i)+(B)(i)	8,937	13,899	5,976	368	14,913	14,267
(ii) Defined Benefit Schemes (A)(ii)+(B)(ii)	520	181	7,560	260	8,080	441
(iii) <b>Total</b>	<b>9,457</b>	<b>14,080</b>	<b>13,536</b>	<b>628</b>	<b>22,993</b>	<b>14,708</b>

*Asset Size of Registered Schemes - by Scheme Arrangement and by Benefit Type\**

	Pooled Schemes		Non-Pooled Schemes		Total	
	Amount HK\$m	No. of Schemes	Amount HK\$m	No. of Schemes	Amount HK\$m	No. of Schemes
<b>(A) Regulated by Insurance Arrangement</b>						
(i) Defined Contribution Schemes	4,857	4,484	61	6	<b>4,918</b>	<b>4,490</b>
(ii) Defined Benefit Schemes	186	22	44	3	<b>230</b>	<b>25</b>
(iii) <b>Subtotal</b>	<b>5,043</b>	<b>4,506</b>	<b>105</b>	<b>9</b>	<b>5,148</b>	<b>4,515</b>
<b>(B) Governed by Trust</b>						
(i) Defined Contribution Schemes	36,390	9,415	39,909	362	<b>76,299</b>	<b>9,777</b>
(ii) Defined Benefit Schemes	3,310	159	72,302	257	<b>75,612</b>	<b>416</b>
(iii) <b>Subtotal</b>	<b>39,700</b>	<b>9,574</b>	<b>112,211</b>	<b>619</b>	<b>151,911</b>	<b>10,193</b>
<b>(C) Aggregate of Schemes Regulated by Insurance Arrangement and Governed by Trust</b>						
(i) Defined Contribution Schemes (A)(i)+(B)(i)	41,247	13,899	39,970	368	<b>81,217</b>	<b>14,267</b>
(ii) Defined Benefit Schemes (A)(ii)+(B)(ii)	3,496	181	72,346	260	<b>75,842</b>	<b>441</b>
(iii) <b>Total</b>	<b>44,743</b>	<b>14,080</b>	<b>112,316</b>	<b>628</b>	<b>157,059</b>	<b>14,708</b>

***Distribution of Asset Size of Registered Schemes\****  
***By Number of Pooling Agreements***

Asset Range (HK\$m)	No. of Pooling Agreements	No. of Schemes Covered	Asset Size (HK\$m)
< 50	33	569	605
50 - < 100	9	317	611
100 - < 500	21	1,665	4,359
500 - < 1,000	9	1,980	6,766
1,000 - < 1,500	4	2,637	4,631
1,500 - < 2,000	1	476	1,745
> = 2,000	5	6,436	26,026
<b>Total</b>	<b>82</b>	<b>14,080</b>	<b>44,743</b>

***By Number of Non-pooled Schemes***

Asset Range (HK\$m)	No. of Schemes	Asset Size (HK\$m)
< 5	157	272
5 - < 10	40	291
10 - < 20	74	1,146
20 - < 30	37	888
30 - < 40	33	1,151
40 - < 50	35	1,562
50 - < 60	26	1,395
60 - < 70	20	1,321
70 - < 80	15	1,114
80 - < 100	32	2,912
> = 100	159	100,264
<b>Total</b>	<b>628</b>	<b>112,316</b>

***By Aggregate of Pooled and Non-pooled Schemes***

Asset Range (HK\$m)	No. of Schemes	Asset Size (HK\$m)
< 1	8,288	3,000
1 - < 2	2,155	3,095
2 - < 10	2,984	12,663
10 - < 20	513	7,220
20 - < 30	201	4,821
30 - < 50	195	7,616
50 - < 100	182	12,729
> = 100	190	105,915
<b>Total</b>	<b>14,708</b>	<b>157,059</b>

\*While there were 16,089 registered schemes as at 30 September 2000, the statistics are compiled on the basis of the latest annual returns filed with MPFA in respect of 14,708 registered schemes. This is because the first annual returns for some of the registered schemes have not yet become due.