

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2012年9月30日，總共有5,258個職業退休計劃，包括4,385個職業退休註冊計劃及873個職業退休豁免計劃。在這5,258個職業退休計劃中，有4,007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 2012, there were 5,258 ORSO schemes, comprising of 4,385 ORSO registered schemes and 873 ORSO exempted schemes. Out of these 5,258 ORSO schemes 4,007 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	3,659 (91%)	348 (9%)	4,007 (100%)
沒有強積金豁免 Non-MPF Exempted	1,009 (81%)	242 (19%)	1,251 (100%)
總數 Total	4,668 (89%)	590 (11%)	5,258 (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	27 (1%)	3,895 (97%)	85 (2%)	4,007 (100%)
沒有強積金豁免 Non-MPF Exempted	338 (27%)	825 (66%)	88 (7%)	1,251 (100%)
總數 Total	365 (7%)	4,720 (90%)	173 (3%)	5,258 (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	3,378 (84%)	629 (16%)	4,007 (100%)
沒有強積金豁免 Non-MPF Exempted	643 (51%)	608 (49%)	1,251 (100%)
總數 Total	4,021 (76%)	1,237 (24%)	5,258 (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	3,422 (92%)	310 (8%)	3,732 (100%)
沒有強積金豁免 Non-MPF Exempted	555 (85%)	98 (15%)	653 (100%)
總數 Total	3,977 (91%)	408 (9%)	4,385 (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	355,646 (98%)	8,141 (2%)	363,787 (100%)
沒有強積金豁免 Non-MPF Exempted	43,594 (99%)	390 (1%)	43,984 (100%)
總數 Total	399,240 (98%)	8,531 (2%)	407,771 (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	13,615 (80%)	3,478 (20%)	17,093 (100%)
沒有強積金豁免 Non-MPF Exempted	552 (75%)	188 (25%)	740 (100%)
總數 Total	14,167 (79%)	3,666 (21%)	17,833 (100%)

B. 截至 2012 年 9 月 30 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 September 2012

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	3,732	653	4,385
豁免計劃 Exempted Schemes	275	598	873
總數 Total	4,007	1,251	5,258

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	0	0	0
總數 Total	0	0	0

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	105,652	3,324	123,972	181	229,624	3,505
(ii) 界定利益計劃 Defined Benefit Schemes	7,594	98	126,569	129	134,163	227
(iii) 總數 Total	113,246	3,422	250,541	310	363,787	3,732

(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	8,027	242	809	3	8,836	245
(ii) 界定利益計劃 Defined Benefit Schemes	264	5	0	0	264	5
(iii) 分項總數 Sub-total	8,291	247	809	3	9,100	250
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	10,375	303	18,352	81	28,727	384
(ii) 界定利益計劃 Defined Benefit Schemes	159	5	5,998	14	6,157	19
(iii) 分項總數 Sub-total	10,534	308	24,350	95	34,884	403
(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)	18,402	545	19,161	84	37,563	629
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	423	10	5,998	14	6,421	24
(iii) 總數 Total	18,825	555	25,159	98	43,984	653

(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	8,027	242	809	3	8,836	245
(ii) 界定利益計劃 Defined Benefit Schemes	264	5	0	0	264	5
(iii) 分項總數 Sub-total	8,291	247	809	3	9,100	250
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	116,027	3,627	142,324	262	258,351	3,889
(ii) 界定利益計劃 Defined Benefit Schemes	7,753	103	132,567	143	140,320	246
(iii) 分項總數 Sub-total	123,780	3,730	274,891	405	398,671	4,135
(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)	124,054	3,869	143,133	265	267,187	4,134
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	8,017	108	132,567	143	140,584	251
(iii) 總數 Total	132,071	3,977	275,700	408	407,771	4,385

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	4,143	3,294	7,001	181	11,144	3,475
(ii) 界定利益計劃 Defined Benefit Schemes	301	97	5,648	129	5,949	226
(iii) 總數 Total	4,444	3,391	12,649	310	17,093	3,701

(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	45	240	14	3	59	243
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	45	245	14	3	59	248
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	103	297	537	79	640	376
(ii) 界定利益計劃 Defined Benefit Schemes	1	5	40	14	41	19
(iii) 分項總數 Sub-total	104	302	577	93	681	395
(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)	148	537	551	82	699	619
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	1	10	40	14	41	24
(iii) 總數 Total	149	547	591	96	740	643

(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	45	240	14	3	59	243
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	45	245	14	3	59	248
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,246	3,591	7,538	260	11,784	3,851
(ii) 界定利益計劃 Defined Benefit Schemes	302	102	5,688	143	5,990	245
(iii) 分項總數 Sub-total	4,548	3,693	13,226	403	17,774	4,096
(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)	4,291	3,831	7,552	263	11,843	4,094
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	302	107	5,688	143	5,990	250
(iii) 總數 Total	4,593	3,938	13,240	406	17,833	4,344

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	51,174	3,294	97,550	181	148,724	3,475
(ii) 界定利益計劃 Defined Benefit Schemes	5,160	97	98,465	129	103,625	226
(iii) 總數 Total	56,334	3,391	196,015	310	252,349	3,701

(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	1,072	240	134	3	1,206	243
(ii) 界定利益計劃 Defined Benefit Schemes	123	5	0	0	123	5
(iii) 分項總數 Sub-total	1,195	245	134	3	1,329	248
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	1,981	297	5,490	79	7,471	376
(ii) 界定利益計劃 Defined Benefit Schemes	28	5	2,313	14	2,341	19
(iii) 分項總數 Sub-total	2,009	302	7,803	93	9,812	395
(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)	3,053	537	5,624	82	8,677	619
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	151	10	2,313	14	2,464	24
(iii) 總數 Total	3,204	547	7,937	96	11,141	643

(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	1,072	240	134	3	1,206	243
(ii) 界定利益計劃 Defined Benefit Schemes	123	5	0	0	123	5
(iii) 分項總數 Sub-total	1,195	245	134	3	1,329	248
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	53,155	3,591	103,040	260	156,195	3,851
(ii) 界定利益計劃 Defined Benefit Schemes	5,188	102	100,778	143	105,966	245
(iii) 分項總數 Sub-total	58,343	3,693	203,818	403	262,161	4,096
(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)	54,227	3,831	103,174	263	157,401	4,094
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,311	107	100,778	143	106,089	250
(iii) 總數 Total	59,538	3,938	203,952	406	263,490	4,344

職業退休註冊計劃資產值的分佈(註)

Distribution of Asset Size of ORSO Registered Schemes (Note)

按匯集協議的數目劃分 - 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	8	24	162
50 - < 100	3	7	215
100 - < 500	14	345	3,883
500 - < 1,000	3	63	2,312
1,000 - < 1,500	4	252	4,732
1,500 - < 2,000	1	201	1,396
>= 2,000	7	2,499	43,634
總數 Total	40	3,391	56,334

(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	19	85	188
50 - < 100	1	1	11
100 - < 500	10	123	512
500 - < 1,000	2	98	713
1,000 - < 1,500	4	14	167
1,500 - < 2,000	1	31	148
>= 2,000	6	195	1,465
總數 Total	43	547	3,204

(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	26	109	350
50 - < 100	3	8	226
100 - < 500	15	468	4,395
500 - < 1,000	4	161	3,025
1,000 - < 1,500	4	266	4,899
1,500 - < 2,000	1	232	1,544
>= 2,000	7	2,694	45,099
總數 Total	60	3,938	59,538

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	46
5 - < 10	11	73
10 - < 20	25	353
20 - < 30	18	450
30 - < 40	10	345
40 - < 50	18	793
50 - < 60	14	755
60 - < 70	13	864
70 - < 80	13	973
80 - < 100	21	1,900
>= 100	147	189,463
總數 Total	310	196,015

(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	29	63
5 - < 10	14	100
10 - < 20	9	116
20 - < 30	4	110
30 - < 40	4	137
40 - < 50	4	179
50 - < 60	6	331
60 - < 70	2	123
70 - < 80	1	77
80 - < 100	3	257
>= 100	20	6,444
總數 Total	96	7,937

(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	49	109
5 - < 10	25	173
10 - < 20	34	469
20 - < 30	22	560
30 - < 40	14	482
40 - < 50	22	972
50 - < 60	20	1,086
60 - < 70	15	987
70 - < 80	14	1,050
80 - < 100	24	2,157
>= 100	167	195,907
總數 Total	406	203,952

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	500	266
1 - < 2	533	788
2 - < 10	1,499	7,586
10 - < 20	406	5,735
20 - < 30	151	3,718
30 - < 50	172	6,718
50 - < 100	197	14,022
>=100	243	213,516
總數 Total	3,701	252,349

(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	210	87
1 - < 2	95	139
2 - < 10	210	957
10 - < 20	52	699
20 - < 30	16	407
30 - < 50	20	762
50 - < 100	17	1,128
>=100	23	6,962
總數 Total	643	11,141

(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	710	353
1 - < 2	628	927
2 - < 10	1,709	8,543
10 - < 20	458	6,434
20 - < 30	167	4,125
30 - < 50	192	7,480
50 - < 100	214	15,150
>=100	266	220,478
總數 Total	4,344	263,490

註：統計數字乃根據截至2012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 2012 in respect of registered schemes.