

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2008年3月31日，總共有7,388個職業退休計劃，包括5,282個職業退休註冊計劃及2,106個職業退休豁免計劃。在這7,388個職業退休計劃中，有4,754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 2008, there were 7,388 ORSO schemes, comprising of 5,282 ORSO registered schemes and 2,106 ORSO exempted schemes. Out of these 7,388 ORSO schemes 4,754 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	4,350 (92%)	404 (8%)	4,754 (100%)
沒有強積金豁免 Non-MPF Exempted	1,736 (66%)	898 (34%)	2,634 (100%)
總數 Total	6,086 (82%)	1,302 (18%)	7,388 (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	32 (1%)	4,619 (97%)	103 (2%)	4,754 (100%)
沒有強積金豁免 Non-MPF Exempted	542 (21%)	1,818 (69%)	274 (10%)	2,634 (100%)
總數 Total	574 (8%)	6,437 (87%)	377 (5%)	7,388 (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	3,959 (83%)	795 (17%)	4,754 (100%)
沒有強積金豁免 Non-MPF Exempted	866 (33%)	1,768 (67%)	2,634 (100%)
總數 Total	4,825 (65%)	2,563 (35%)	7,388 (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	4,068 (92%)	346 (8%)	4,414 (100%)
沒有強積金豁免 Non-MPF Exempted	746 (86%)	122 (14%)	868 (100%)
總數 Total	4,814 (91%)	468 (9%)	5,282 (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	428,520 (99%)	6,017 (1%)	434,537 (100%)
沒有強積金豁免 Non-MPF Exempted	46,463 (97%)	1,308 (3%)	47,771 (100%)
總數 Total	474,983 (98%)	7,325 (2%)	482,308 (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	11,243 (77%)	3,294 (23%)	14,537 (100%)
沒有強積金豁免 Non-MPF Exempted	680 (83%)	139 (17%)	819 (100%)
總數 Total	11,923 (78%)	3,433 (22%)	15,356 (100%)

B. 截至 2008 年 3 月 31 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2008

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	4,414	868	5,282
豁免計劃 Exempted Schemes	340	1,766	2,106
總數 Total	4,754	2,634	7,388

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	17	1	18
總數 Total	17	1	18

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	153,628	3,958	133,237	198	286,865	4,156
(ii) 界定利益計劃 Defined Benefit Schemes	10,659	110	137,013	148	147,672	258
(iii) 總數 Total	164,287	4,068	270,250	346	434,537	4,414

(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	7,137	329	846	4	7,983	333
(ii) 界定利益計劃 Defined Benefit Schemes	457	5	0	0	457	5
(iii) 分項總數 Sub-total	7,594	334	846	4	8,440	338
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	15,278	405	16,663	97	31,941	502
(ii) 界定利益計劃 Defined Benefit Schemes	261	7	7,129	21	7,390	28
(iii) 分項總數 Sub-total	15,539	412	23,792	118	39,331	530
(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)	22,415	734	17,509	101	39,924	835
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	718	12	7,129	21	7,847	33
(iii) 總數 Total	23,133	746	24,638	122	47,771	868

(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	7,137	329	846	4	7,983	333
(ii) 界定利益計劃 Defined Benefit Schemes	457	5	0	0	457	5
(iii) 分項總數 Sub-total	7,594	334	846	4	8,440	338
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	168,906	4,363	149,900	295	318,806	4,658
(ii) 界定利益計劃 Defined Benefit Schemes	10,920	117	144,142	169	155,062	286
(iii) 分項總數 Sub-total	179,826	4,480	294,042	464	473,868	4,944
(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)	176,043	4,692	150,746	299	326,789	4,991
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	11,377	122	144,142	169	155,519	291
(iii) 總數 Total	187,420	4,814	294,888	468	482,308	5,282

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	4,269	3,888	5,676	194	9,945	4,082
(ii) 界定利益計劃 Defined Benefit Schemes	337	110	4,255	145	4,592	255
(iii) 總數 Total	4,606	3,998	9,931	339	14,537	4,337

(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	254	322	13	4	267	326
(ii) 界定利益計劃 Defined Benefit Schemes	1	4	0	0	1	4
(iii) 分項總數 Sub-total	255	326	13	4	268	330
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	88	396	367	87	455	483
(ii) 界定利益計劃 Defined Benefit Schemes	0	7	96	20	96	27
(iii) 分項總數 Sub-total	88	403	463	107	551	510
(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)	342	718	380	91	722	809
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	1	11	96	20	97	31
(iii) 總數 Total	343	729	476	111	819	840

(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	254	322	13	4	267	326
(ii) 界定利益計劃 Defined Benefit Schemes	1	4	0	0	1	4
(iii) 分項總數 Sub-total	255	326	13	4	268	330
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,357	4,284	6,043	281	10,400	4,565
(ii) 界定利益計劃 Defined Benefit Schemes	337	117	4,351	165	4,688	282
(iii) 分項總數 Sub-total	4,694	4,401	10,394	446	15,088	4,847
(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)	4,611	4,606	6,056	285	10,667	4,891
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	338	121	4,351	165	4,689	286
(iii) 總數 Total	4,949	4,727	10,407	450	15,356	5,177

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	48,191	3,888	82,515	194	130,706	4,082
(ii) 界定利益計劃 Defined Benefit Schemes	6,006	110	95,879	145	101,885	255
(iii) 總數 Total	54,197	3,998	178,394	339	232,591	4,337

(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	1,129	322	95	4	1,224	326
(ii) 界定利益計劃 Defined Benefit Schemes	50	4	0	0	50	4
(iii) 分項總數 Sub-total	1,179	326	95	4	1,274	330
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,410	396	4,441	87	6,851	483
(ii) 界定利益計劃 Defined Benefit Schemes	49	7	2,596	20	2,645	27
(iii) 分項總數 Sub-total	2,459	403	7,037	107	9,496	510
(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)	3,539	718	4,536	91	8,075	809
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	99	11	2,596	20	2,695	31
(iii) 總數 Total	3,638	729	7,132	111	10,770	840

(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	1,129	322	95	4	1,224	326
(ii) 界定利益計劃 Defined Benefit Schemes	50	4	0	0	50	4
(iii) 分項總數 Sub-total	1,179	326	95	4	1,274	330
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	50,601	4,284	86,956	281	137,557	4,565
(ii) 界定利益計劃 Defined Benefit Schemes	6,055	117	98,475	165	104,530	282
(iii) 分項總數 Sub-total	56,656	4,401	185,431	446	242,087	4,847
(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)	51,730	4,606	87,051	285	138,781	4,891
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,105	121	98,475	165	104,580	286
(iii) 總數 Total	57,835	4,727	185,526	450	243,361	5,177

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	21	129
50 - < 100	8	83	536
100 - < 500	11	280	3,218
500 - < 1,000	6	357	4,408
1,000 - < 1,500	1	70	979
1,500 - < 2,000	1	40	1,628
>= 2,000	9	3,147	43,299
總數 Total	44	3,998	54,197

(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	17	75	119
50 - < 100	7	59	231
100 - < 500	8	137	480
500 - < 1,000	5	140	669
1,000 - < 1,500	1	5	68
1,500 - < 2,000	1	9	73
>= 2,000	8	304	1,998
總數 Total	47	729	3,638

(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	22	96	248
50 - < 100	11	142	767
100 - < 500	12	417	3,698
500 - < 1,000	7	497	5,077
1,000 - < 1,500	1	75	1,047
1,500 - < 2,000	1	49	1,701
>= 2,000	9	3,451	45,297
總數 Total	63	4,727	57,835

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	26	65
5 - < 10	16	122
10 - < 20	24	363
20 - < 30	24	614
30 - < 40	18	635
40 - < 50	10	447
50 - < 60	19	1,045
60 - < 70	16	1,030
70 - < 80	10	744
80 - < 100	20	1,802
>= 100	156	171,527
總數 Total	339	178,394

(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	47	93
5 - < 10	14	95
10 - < 20	8	107
20 - < 30	2	52
30 - < 40	8	276
40 - < 50	1	47
50 - < 60	7	382
60 - < 70	4	256
70 - < 80	0	0
80 - < 100	6	533
>= 100	14	5,291
總數 Total	111	7,132

(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	73	158
5 - < 10	30	217
10 - < 20	32	470
20 - < 30	26	666
30 - < 40	26	911
40 - < 50	11	494
50 - < 60	26	1,427
60 - < 70	20	1,286
70 - < 80	10	744
80 - < 100	26	2,335
>= 100	170	176,818
總數 Total	450	185,526

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	718	388
1 - < 2	700	1,024
2 - < 10	1,740	8,537
10 - < 20	403	5,639
20 - < 30	162	4,021
30 - < 50	191	7,384
50 - < 100	173	11,981
>=100	250	193,617
總數 Total	4,337	232,591

(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	300	117
1 - < 2	138	203
2 - < 10	266	1,183
10 - < 20	62	862
20 - < 30	15	389
30 - < 50	22	814
50 - < 100	20	1,385
>=100	17	5,817
總數 Total	840	10,770

(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	1,018	505
1 - < 2	838	1,227
2 - < 10	2,006	9,720
10 - < 20	465	6,501
20 - < 30	177	4,410
30 - < 50	213	8,198
50 - < 100	193	13,366
>=100	267	199,434
總數 Total	5,177	243,361

註：統計數字乃根據截至2008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 up to 31 March 2008 in respect of registered schemes.