

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6月30日，總共有7,315個職業退休計劃，包括5,217個職業退休註冊計劃及2,098個職業退休豁免計劃。在這7,315個職業退休計劃中，有4,697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 June 2008, there were 7,315 ORSO schemes, comprising of 5,217 ORSO registered schemes and 2,098 ORSO exempted schemes. Out of these 7,315 ORSO schemes 4,697 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	4,297 (91%)	400 (9%)	4,697 (100%)
沒有強積金豁免 Non-MPF Exempted	1,723 (66%)	895 (34%)	2,618 (100%)
總數 Total	6,020 (82%)	1,295 (18%)	7,315 (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%)	4,564 (97%)	101 (2%)	4,697 (100%)
沒有強積金豁免 Non-MPF Exempted	536 (20%)	1,807 (69%)	275 (11%)	2,618 (100%)
總數 Total	568 (8%)	6,371 (87%)	376 (5%)	7,315 (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	3,916 (83%)	781 (17%)	4,697 (100%)
沒有強積金豁免 Non-MPF Exempted	851 (33%)	1,767 (67%)	2,618 (100%)
總數 Total	4,767 (65%)	2,548 (35%)	7,315 (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	4,014 (92%)	348 (8%)	4,362 (100%)
沒有強積金豁免 Non-MPF Exempted	734 (86%)	121 (14%)	855 (100%)
總數 Total	4,748 (91%)	469 (9%)	5,217 (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	429,021 (99%)	6,229 (1%)	435,250 (100%)
沒有強積金豁免 Non-MPF Exempted	46,546 (97%)	1,307 (3%)	47,853 (100%)
總數 Total	475,567 (98%)	7,536 (2%)	483,103 (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	11,154 (77%)	3,240 (23%)	14,394 (100%)
沒有強積金豁免 Non-MPF Exempted	678 (83%)	137 (17%)	815 (100%)
總數 Total	11,832 (78%)	3,377 (22%)	15,209 (100%)

B. 截至 2008 年 6 月 30 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 June 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	4,362	855	5,217
豁免計劃 Exempted Schemes	335	1,763	2,098
總數 Total	4,697	2,618	7,315

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	1	1	2
受信託所管限 Governed by Trust	13	2	15
總數 Total	14	3	17

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	151,681	3,906	136,021	200	287,702	4,106
(ii) 界定利益計劃 Defined Benefit Schemes	10,568	108	136,980	148	147,548	256
(iii) 總數 Total	162,249	4,014	273,001	348	435,250	4,362

(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	7,054	323	849	5	7,903	328
(ii) 界定利益計劃 Defined Benefit Schemes	457	5	0	0	457	5
(iii) 分項總數 Sub-total	7,511	328	849	5	8,360	333
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	15,522	400	16,595	97	32,117	497
(ii) 界定利益計劃 Defined Benefit Schemes	260	6	7,116	19	7,376	25
(iii) 分項總數 Sub-total	15,782	406	23,711	116	39,493	522
(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)	22,576	723	17,444	102	40,020	825
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	717	11	7,116	19	7,833	30
(iii) 總數 Total	23,293	734	24,560	121	47,853	855

(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	7,054	323	849	5	7,903	328
(ii) 界定利益計劃 Defined Benefit Schemes	457	5	0	0	457	5
(iii) 分項總數 Sub-total	7,511	328	849	5	8,360	333
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	167,203	4,306	152,616	297	319,819	4,603
(ii) 界定利益計劃 Defined Benefit Schemes	10,828	114	144,096	167	154,924	281
(iii) 分項總數 Sub-total	178,031	4,420	296,712	464	474,743	4,884
(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)	174,257	4,629	153,465	302	327,722	4,931
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	11,285	119	144,096	167	155,381	286
(iii) 總數 Total	185,542	4,748	297,561	469	483,103	5,217

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	4,133	3,831	5,675	194	9,808	4,025
(ii) 界定利益計劃 Defined Benefit Schemes	320	108	4,266	145	4,586	253
(iii) 總數 Total	4,453	3,939	9,941	339	14,394	4,278

(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	315	13	4	267	319
(ii) 界定利益計劃 Defined Benefit Schemes	1	4	0	0	1	4
(iii) 分項總數 Sub-total	255	319	13	4	268	323
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	85	390	367	87	452	477
(ii) 界定利益計劃 Defined Benefit Schemes	0	6	95	19	95	25
(iii) 分項總數 Sub-total	85	396	462	106	547	502
(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)	339	705	380	91	719	796
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	1	10	95	19	96	29
(iii) 總數 Total	340	715	475	110	815	825

(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	315	13	4	267	319
(ii) 界定利益計劃 Defined Benefit Schemes	1	4	0	0	1	4
(iii) 分項總數 Sub-total	255	319	13	4	268	323
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,218	4,221	6,042	281	10,260	4,502
(ii) 界定利益計劃 Defined Benefit Schemes	320	114	4,361	164	4,681	278
(iii) 分項總數 Sub-total	4,538	4,335	10,403	445	14,941	4,780
(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)	4,472	4,536	6,055	285	10,527	4,821
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	321	118	4,361	164	4,682	282
(iii) 總數 Total	4,793	4,654	10,416	449	15,209	5,103

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	47,838	3,831	82,681	194	130,519	4,025
(ii) 界定利益計劃 Defined Benefit Schemes	6,139	108	95,953	145	102,092	253
(iii) 總數 Total	53,977	3,939	178,634	339	232,611	4,278

(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	1,113	315	95	4	1,208	319
(ii) 界定利益計劃 Defined Benefit Schemes	50	4	0	0	50	4
(iii) 分項總數 Sub-total	1,163	319	95	4	1,258	323
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,358	390	4,448	87	6,806	477
(ii) 界定利益計劃 Defined Benefit Schemes	40	6	2,603	19	2,643	25
(iii) 分項總數 Sub-total	2,398	396	7,051	106	9,449	502
(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)	3,471	705	4,543	91	8,014	796
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	90	10	2,603	19	2,693	29
(iii) 總數 Total	3,561	715	7,146	110	10,707	825

(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	1,113	315	95	4	1,208	319
(ii) 界定利益計劃 Defined Benefit Schemes	50	4	0	0	50	4
(iii) 分項總數 Sub-total	1,163	319	95	4	1,258	323
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	50,196	4,221	87,129	281	137,325	4,502
(ii) 界定利益計劃 Defined Benefit Schemes	6,179	114	98,556	164	104,735	278
(iii) 分項總數 Sub-total	56,375	4,335	185,685	445	242,060	4,780
(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)	51,309	4,536	87,224	285	138,533	4,821
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,229	118	98,556	164	104,785	282
(iii) 總數 Total	57,538	4,654	185,780	449	243,318	5,103

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	20	128
50 - < 100	8	82	535
100 - < 500	11	273	3,206
500 - < 1,000	6	350	4,402
1,000 - < 1,500	2	109	2,186
1,500 - < 2,000	0	0	0
>= 2,000	9	3,105	43,520
總數 Total	44	3,939	53,977

(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	74	119
50 - < 100	7	59	231
100 - < 500	7	130	434
500 - < 1,000	5	137	643
1,000 - < 1,500	2	13	141
1,500 - < 2,000	0	0	0
>= 2,000	8	302	1,993
總數 Total	46	715	3,561

(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	94	247
50 - < 100	11	141	766
100 - < 500	12	403	3,640
500 - < 1,000	7	487	5,045
1,000 - < 1,500	2	122	2,327
1,500 - < 2,000	0	0	0
>= 2,000	9	3,407	45,513
總數 Total	63	4,654	57,538

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	24	62
5 - < 10	17	127
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	157	171,765
總數 Total	339	178,634

(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	46	94
5 - < 10	14	95
10 - < 20	8	113
20 - < 30	3	81
30 - < 40	7	245
40 - < 50	1	47
50 - < 60	7	382
60 - < 70	4	256
70 - < 80	0	0
80 - < 100	6	542
>= 100	14	5,291
總數 Total	110	7,146

(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	70	156
5 - < 10	31	222
10 - < 20	32	476
20 - < 30	27	695
30 - < 40	25	880
40 - < 50	11	494
50 - < 60	26	1,427
60 - < 70	20	1,286
70 - < 80	10	744
80 - < 100	26	2,344
>= 100	171	177,056
總數 Total	449	185,780

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	694	378
1 - < 2	691	1,013
2 - < 10	1,716	8,470
10 - < 20	403	5,637
20 - < 30	158	3,931
30 - < 50	192	7,445
50 - < 100	174	12,047
>=100	250	193,690
總數 Total	4,278	232,611

(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	290	113
1 - < 2	139	206
2 - < 10	264	1,188
10 - < 20	59	829
20 - < 30	18	467
30 - < 50	18	674
50 - < 100	19	1,295
>=100	18	5,935
總數 Total	825	10,707

(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	984	491
1 - < 2	830	1,219
2 - < 10	1,980	9,658
10 - < 20	462	6,466
20 - < 30	176	4,398
30 - < 50	210	8,119
50 - < 100	193	13,342
>=100	268	199,625
總數 Total	5,103	243,318

註：統計數字乃根據截至2008年6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 June 2008 in respect of registered schemes.