

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2009年3月31日，總共有7,178個職業退休計劃，包括5,089個職業退休註冊計劃及2,089個職業退休豁免計劃。在這7,178個職業退休計劃中，有4,582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 2009, there were 7,178 ORSO schemes, comprising of 5,089 ORSO registered schemes and 2,089 ORSO exempted schemes. Out of these 7,178 ORSO schemes 4,582 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	4,193 (92%)	389 (8%)	4,582 (100%)
沒有強積金豁免 Non-MPF Exempted	1,699 (65%)	897 (35%)	2,596 (100%)
總數 Total	5,892 (82%)	1,286 (18%)	7,178 (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%)	4,453 (97%)	97 (2%)	4,582 (100%)
沒有強積金豁免 Non-MPF Exempted	524 (20%)	1,790 (69%)	282 (11%)	2,596 (100%)
總數 Total	556 (8%)	6,243 (87%)	379 (5%)	7,178 (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	3,833 (84%)	749 (16%)	4,582 (100%)
沒有強積金豁免 Non-MPF Exempted	828 (32%)	1,768 (68%)	2,596 (100%)
總數 Total	4,661 (65%)	2,517 (35%)	7,178 (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	3,917 (92%)	344 (8%)	4,261 (100%)
沒有強積金豁免 Non-MPF Exempted	709 (86%)	119 (14%)	828 (100%)
總數 Total	4,626 (91%)	463 (9%)	5,089 (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	405,243 (98%)	9,514 (2%)	414,757 (100%)
沒有強積金豁免 Non-MPF Exempted	46,679 (96%)	1,888 (4%)	48,567 (100%)
總數 Total	451,922 (98%)	11,402 (2%)	463,324 (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	11,163 (77%)	3,260 (23%)	14,423 (100%)
沒有強積金豁免 Non-MPF Exempted	683 (80%)	167 (20%)	850 (100%)
總數 Total	11,846 (78%)	3,427 (22%)	15,273 (100%)

B. 截至 2009 年 3 月 31 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2009

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	4,261	828	5,089
豁免計劃 Exempted Schemes	321	1,768	2,089
總數 Total	4,582	2,596	7,178

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	0	1
受信託所管限 Governed by Trust	25	0	25
總數 Total	26	0	26

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	140,063	3,808	132,432	201	272,495	4,009
(ii) 界定利益計劃 Defined Benefit Schemes	10,288	109	131,974	143	142,262	252
(iii) 總數 Total	150,351	3,917	264,406	344	414,757	4,261

(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	9,401	313	806	4	10,207	317
(ii) 界定利益計劃 Defined Benefit Schemes	372	5	0	0	372	5
(iii) 分項總數 Sub-total	9,773	318	806	4	10,579	322
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	14,227	385	16,667	97	30,894	482
(ii) 界定利益計劃 Defined Benefit Schemes	249	6	6,845	18	7,094	24
(iii) 分項總數 Sub-total	14,476	391	23,512	115	37,988	506
(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)	23,628	698	17,473	101	41,101	799
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	621	11	6,845	18	7,466	29
(iii) 總數 Total	24,249	709	24,318	119	48,567	828

(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	9,401	313	806	4	10,207	317
(ii) 界定利益計劃 Defined Benefit Schemes	372	5	0	0	372	5
(iii) 分項總數 Sub-total	9,773	318	806	4	10,579	322
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	154,290	4,193	149,099	298	303,389	4,491
(ii) 界定利益計劃 Defined Benefit Schemes	10,537	115	138,819	161	149,356	276
(iii) 分項總數 Sub-total	164,827	4,308	287,918	459	452,745	4,767
(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)	163,691	4,506	149,905	302	313,596	4,808
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	10,909	120	138,819	161	149,728	281
(iii) 總數 Total	174,600	4,626	288,724	463	463,324	5,089

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	4,062	3,728	6,061	197	10,123	3,925
(ii) 界定利益計劃 Defined Benefit Schemes	285	107	4,015	142	4,300	249
(iii) 總數 Total	4,347	3,835	10,076	339	14,423	4,174

(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	36	308	16	4	52	312
(ii) 界定利益計劃 Defined Benefit Schemes	5	5	0	0	5	5
(iii) 分項總數 Sub-total	41	313	16	4	57	317
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	111	376	512	86	623	462
(ii) 界定利益計劃 Defined Benefit Schemes	1	6	169	18	170	24
(iii) 分項總數 Sub-total	112	382	681	104	793	486
(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)	147	684	528	90	675	774
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6	11	169	18	175	29
(iii) 總數 Total	153	695	697	108	850	803

(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	36	308	16	4	52	312
(ii) 界定利益計劃 Defined Benefit Schemes	5	5	0	0	5	5
(iii) 分項總數 Sub-total	41	313	16	4	57	317
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,173	4,104	6,573	283	10,746	4,387
(ii) 界定利益計劃 Defined Benefit Schemes	286	113	4,184	160	4,470	273
(iii) 分項總數 Sub-total	4,459	4,217	10,757	443	15,216	4,660
(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)	4,209	4,412	6,589	287	10,798	4,699
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	291	118	4,184	160	4,475	278
(iii) 總數 Total	4,500	4,530	10,773	447	15,273	4,977

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	50,113	3,728	89,047	197	139,160	3,925
(ii) 界定利益計劃 Defined Benefit Schemes	6,722	107	101,569	142	108,291	249
(iii) 總數 Total	56,835	3,835	190,616	339	247,451	4,174

(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	1,292	308	111	4	1,403	312
(ii) 界定利益計劃 Defined Benefit Schemes	205	5	0	0	205	5
(iii) 分項總數 Sub-total	1,497	313	111	4	1,608	317
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,541	376	5,064	86	7,605	462
(ii) 界定利益計劃 Defined Benefit Schemes	39	6	2,803	18	2,842	24
(iii) 分項總數 Sub-total	2,580	382	7,867	104	10,447	486
(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)	3,833	684	5,175	90	9,008	774
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	244	11	2,803	18	3,047	29
(iii) 總數 Total	4,077	695	7,978	108	12,055	803

(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	1,292	308	111	4	1,403	312
(ii) 界定利益計劃 Defined Benefit Schemes	205	5	0	0	205	5
(iii) 分項總數 Sub-total	1,497	313	111	4	1,608	317
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	52,654	4,104	94,111	283	146,765	4,387
(ii) 界定利益計劃 Defined Benefit Schemes	6,761	113	104,372	160	111,133	273
(iii) 分項總數 Sub-total	59,415	4,217	198,483	443	257,898	4,660
(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)	53,946	4,412	94,222	287	148,168	4,699
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,966	118	104,372	160	111,338	278
(iii) 總數 Total	60,912	4,530	198,594	447	259,506	4,977

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	7	18	98
50 - < 100	8	81	566
100 - < 500	10	266	2,837
500 - < 1,000	7	336	5,129
1,000 - < 1,500	2	105	2,315
1,500 - < 2,000	0	0	0
>= 2,000	9	3,029	45,890
總數 Total	43	3,835	56,835

(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	18	97	206
50 - < 100	5	30	116
100 - < 500	7	124	496
500 - < 1,000	5	137	951
1,000 - < 1,500	2	12	113
1,500 - < 2,000	0	0	0
>= 2,000	8	295	2,195
總數 Total	45	695	4,077

(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	23	115	304
50 - < 100	9	111	682
100 - < 500	11	390	3,333
500 - < 1,000	8	473	6,080
1,000 - < 1,500	2	117	2,428
1,500 - < 2,000	0	0	0
>= 2,000	9	3,324	48,085
總數 Total	62	4,530	60,912

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	25	72
5 - < 10	13	98
10 - < 20	23	315
20 - < 30	24	599
30 - < 40	18	615
40 - < 50	13	586
50 - < 60	13	711
60 - < 70	15	988
70 - < 80	15	1,126
80 - < 100	13	1,169
>= 100	167	184,337
總數 Total	339	190,616

(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	44	98
5 - < 10	14	99
10 - < 20	7	106
20 - < 30	3	86
30 - < 40	6	207
40 - < 50	4	192
50 - < 60	5	284
60 - < 70	2	123
70 - < 80	1	70
80 - < 100	4	378
>= 100	18	6,335
總數 Total	108	7,978

(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	69	170
5 - < 10	27	197
10 - < 20	30	421
20 - < 30	27	685
30 - < 40	24	822
40 - < 50	17	778
50 - < 60	18	995
60 - < 70	17	1,111
70 - < 80	16	1,196
80 - < 100	17	1,547
>= 100	185	190,672
總數 Total	447	198,594

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	647	352
1 - < 2	652	953
2 - < 10	1,651	8,114
10 - < 20	435	6,076
20 - < 30	157	3,928
30 - < 50	189	7,434
50 - < 100	176	12,159
>=100	267	208,435
總數 Total	4,174	247,451

(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	276	106
1 - < 2	125	183
2 - < 10	261	1,183
10 - < 20	60	845
20 - < 30	18	443
30 - < 50	22	828
50 - < 100	17	1,145
>=100	24	7,322
總數 Total	803	12,055

(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	923	458
1 - < 2	777	1,136
2 - < 10	1,912	9,297
10 - < 20	495	6,921
20 - < 30	175	4,371
30 - < 50	211	8,262
50 - < 100	193	13,304
>=100	291	215,757
總數 Total	4,977	259,506

註：統計數字乃根據截至2009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 2009 in respect of registered schemes.