

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2010年3月31日，總共有6,902個職業退休計劃，包括4,855個職業退休註冊計劃及2,047個職業退休豁免計劃。在這6,902個職業退休計劃中，有4,392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 2010, there were 6,902 ORSO schemes, comprising of 4,855 ORSO registered schemes and 2,047 ORSO exempted schemes. Out of these 6,902 ORSO schemes 4,392 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	4,014 (91%)	378 (9%)	4,392 (100%)
沒有強積金豁免 Non-MPF Exempted	1,645 (66%)	865 (34%)	2,510 (100%)
總數 Total	5,659 (82%)	1,243 (18%)	6,902 (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	30 (1%)	4,270 (97%)	92 (2%)	4,392 (100%)
沒有強積金豁免 Non-MPF Exempted	508 (20%)	1,716 (68%)	286 (11%)	2,510 (99%)
總數 Total	538 (8%)	5,986 (87%)	378 (5%)	6,902 (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	3,685 (84%)	707 (16%)	4,392 (100%)
沒有強積金豁免 Non-MPF Exempted	794 (32%)	1,716 (68%)	2,510 (100%)
總數 Total	4,479 (65%)	2,423 (35%)	6,902 (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	3,753 (92%)	331 (8%)	4,084 (100%)
沒有強積金豁免 Non-MPF Exempted	658 (85%)	113 (15%)	771 (100%)
總數 Total	4,411 (91%)	444 (9%)	4,855 (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	391,583 (98%)	8,385 (2%)	399,968 (100%)
沒有強積金豁免 Non-MPF Exempted	45,476 (98%)	1,128 (2%)	46,604 (100%)
總數 Total	437,059 (98%)	9,513 (2%)	446,572 (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	12,028 (77%)	3,573 (23%)	15,601 (100%)
沒有強積金豁免 Non-MPF Exempted	530 (76%)	170 (24%)	700 (100%)
總數 Total	12,558 (77%)	3,743 (23%)	16,301 (100%)

B. 截至 2010 年 3 月 31 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2010

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	4,084	771	4,855
豁免計劃 Exempted Schemes	308	1,739	2,047
總數 Total	4,392	2,510	6,902

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	11	0	11
總數 Total	11	0	11

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	127,928	3,645	131,867	193	259,795	3,838
(ii) 界定利益計劃 Defined Benefit Schemes	9,767	108	130,406	138	140,173	246
(iii) 總數 Total	137,695	3,753	262,273	331	399,968	4,084

(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	8,965	299	847	3	9,812	302
(ii) 界定利益計劃 Defined Benefit Schemes	333	5	0	0	333	5
(iii) 分項總數 Sub-total	9,298	304	847	3	10,145	307
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	12,125	348	17,425	92	29,550	440
(ii) 界定利益計劃 Defined Benefit Schemes	248	6	6,661	18	6,909	24
(iii) 分項總數 Sub-total	12,373	354	24,086	110	36,459	464
(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)	21,090	647	18,272	95	39,362	742
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	581	11	6,661	18	7,242	29
(iii) 總數 Total	21,671	658	24,933	113	46,604	771

(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	8,965	299	847	3	9,812	302
(ii) 界定利益計劃 Defined Benefit Schemes	333	5	0	0	333	5
(iii) 分項總數 Sub-total	9,298	304	847	3	10,145	307
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	140,053	3,993	149,292	285	289,345	4,278
(ii) 界定利益計劃 Defined Benefit Schemes	10,015	114	137,067	156	147,082	270
(iii) 分項總數 Sub-total	150,068	4,107	286,359	441	436,427	4,548
(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)	149,018	4,292	150,139	288	299,157	4,580
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	10,348	119	137,067	156	147,415	275
(iii) 總數 Total	159,366	4,411	287,206	444	446,572	4,855

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	4,047	3,587	6,964	192	11,011	3,779
(ii) 界定利益計劃 Defined Benefit Schemes	274	105	4,316	138	4,590	243
(iii) 總數 Total	4,321	3,692	11,280	330	15,601	4,022

(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	35	293	14	3	49	296
(ii) 界定利益計劃 Defined Benefit Schemes	4	5	0	0	4	5
(iii) 分項總數 Sub-total	39	298	14	3	53	301
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	95	341	486	87	581	428
(ii) 界定利益計劃 Defined Benefit Schemes	2	6	64	18	66	24
(iii) 分項總數 Sub-total	97	347	550	105	647	452
(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)	130	634	500	90	630	724
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6	11	64	18	70	29
(iii) 總數 Total	136	645	564	108	700	753

(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	35	293	14	3	49	296
(ii) 界定利益計劃 Defined Benefit Schemes	4	5	0	0	4	5
(iii) 分項總數 Sub-total	39	298	14	3	53	301
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,142	3,928	7,450	279	11,592	4,207
(ii) 界定利益計劃 Defined Benefit Schemes	276	111	4,380	156	4,656	267
(iii) 分項總數 Sub-total	4,418	4,039	11,830	435	16,248	4,474
(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)	4,177	4,221	7,464	282	11,641	4,503
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	280	116	4,380	156	4,660	272
(iii) 總數 Total	4,457	4,337	11,844	438	16,301	4,775

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	46,136	3,587	69,605	192	115,741	3,779
(ii) 界定利益計劃 Defined Benefit Schemes	5,094	105	78,171	138	83,265	243
(iii) 總數 Total	51,230	3,692	147,776	330	199,006	4,022

(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	1,078	293	124	3	1,202	296
(ii) 界定利益計劃 Defined Benefit Schemes	124	5	0	0	124	5
(iii) 分項總數 Sub-total	1,202	298	124	3	1,326	301
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	1,986	341	3,991	87	5,977	428
(ii) 界定利益計劃 Defined Benefit Schemes	40	6	2,188	18	2,228	24
(iii) 分項總數 Sub-total	2,026	347	6,179	105	8,205	452
(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)	3,064	634	4,115	90	7,179	724
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	164	11	2,188	18	2,352	29
(iii) 總數 Total	3,228	645	6,303	108	9,531	753

(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	1,078	293	124	3	1,202	296
(ii) 界定利益計劃 Defined Benefit Schemes	124	5	0	0	124	5
(iii) 分項總數 Sub-total	1,202	298	124	3	1,326	301
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	48,122	3,928	73,596	279	121,718	4,207
(ii) 界定利益計劃 Defined Benefit Schemes	5,134	111	80,359	156	85,493	267
(iii) 分項總數 Sub-total	53,256	4,039	153,955	435	207,211	4,474
(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)	49,200	4,221	73,720	282	122,920	4,503
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,258	116	80,359	156	85,617	272
(iii) 總數 Total	54,458	4,337	154,079	438	208,537	4,775

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	6	15	104
50 - < 100	7	62	429
100 - < 500	12	344	3,484
500 - < 1,000	4	155	3,116
1,000 - < 1,500	3	178	3,387
1,500 - < 2,000	1	243	1,676
>= 2,000	8	2,695	39,034
總數 Total	41	3,692	51,230

(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	20	96	189
50 - < 100	4	27	166
100 - < 500	8	125	420
500 - < 1,000	3	118	705
1,000 - < 1,500	3	13	113
1,500 - < 2,000	1	36	140
>= 2,000	7	230	1,495
總數 Total	46	645	3,228

(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	24	111	293
50 - < 100	8	89	595
100 - < 500	13	469	3,904
500 - < 1,000	5	273	3,821
1,000 - < 1,500	3	191	3,500
1,500 - < 2,000	1	279	1,816
>= 2,000	8	2,925	40,529
總數 Total	62	4,337	54,458

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	27	66
5 - < 10	12	90
10 - < 20	35	489
20 - < 30	21	494
30 - < 40	17	587
40 - < 50	14	609
50 - < 60	26	1,415
60 - < 70	14	920
70 - < 80	8	609
80 - < 100	14	1,205
>= 100	142	141,292
總數 Total	330	147,776

(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	48	90
5 - < 10	11	75
10 - < 20	4	53
20 - < 30	7	170
30 - < 40	7	242
40 - < 50	4	174
50 - < 60	3	159
60 - < 70	2	127
70 - < 80	1	72
80 - < 100	3	249
>= 100	18	4,892
總數 Total	108	6,303

(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	75	156
5 - < 10	23	165
10 - < 20	39	542
20 - < 30	28	664
30 - < 40	24	829
40 - < 50	18	783
50 - < 60	29	1,574
60 - < 70	16	1,047
70 - < 80	9	681
80 - < 100	17	1,454
>= 100	160	146,184
總數 Total	438	154,079

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	655	350
1 - < 2	639	935
2 - < 10	1,585	7,800
10 - < 20	400	5,556
20 - < 30	154	3,747
30 - < 50	176	6,770
50 - < 100	173	11,499
>=100	240	162,349
總數 Total	4,022	199,006

(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	279	104
1 - < 2	123	179
2 - < 10	231	1,033
10 - < 20	45	637
20 - < 30	20	481
30 - < 50	20	761
50 - < 100	14	943
>=100	21	5,393
總數 Total	753	9,531

(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	934	454
1 - < 2	762	1,114
2 - < 10	1,816	8,833
10 - < 20	445	6,193
20 - < 30	174	4,228
30 - < 50	196	7,531
50 - < 100	187	12,442
>=100	261	167,742
總數 Total	4,775	208,537

註：統計數字乃根據截至2010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 2010 in respect of registered schemes.