

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6月30日，總共有6,879個職業退休計劃，包括4,807個職業退休註冊計劃及2,072個職業退休豁免計劃。在這6,879個職業退休計劃中，有4,349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 2010, there were 6,879 ORSO schemes, comprising of 4,807 ORSO registered schemes and 2,072 ORSO exempted schemes. Out of these 6,879 ORSO schemes 4,349 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	3,975 (91%)	374 (9%)	4,349 (100%)
沒有強積金豁免 Non-MPF Exempted	1,659 (66%)	871 (34%)	2,530 (100%)
總數 Total	5,634 (82%)	1,245 (18%)	6,879 (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	29 (1%)	4,229 (97%)	91 (2%)	4,349 (100%)
沒有強積金豁免 Non-MPF Exempted	516 (20%)	1,723 (68%)	291 (12%)	2,530 (100%)
總數 Total	545 (8%)	5,952 (86%)	382 (6%)	6,879 (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	3,647 (84%)	702 (16%)	4,349 (100%)
沒有強積金豁免 Non-MPF Exempted	790 (31%)	1,740 (69%)	2,530 (100%)
總數 Total	4,437 (65%)	2,442 (35%)	6,879 (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	3,714 (92%)	329 (8%)	4,043 (100%)
沒有強積金豁免 Non-MPF Exempted	649 (85%)	115 (15%)	764 (100%)
總數 Total	4,363 (91%)	444 (9%)	4,807 (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	390,847 (98%)	8,191 (2%)	399,038 (100%)
沒有強積金豁免 Non-MPF Exempted	45,179 (98%)	1,014 (2%)	46,193 (100%)
總數 Total	436,026 (98%)	9,205 (2%)	445,231 (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	12,155 (77%)	3,559 (23%)	15,714 (100%)
沒有強積金豁免 Non-MPF Exempted	526 (76%)	168 (24%)	694 (100%)
總數 Total	12,681 (77%)	3,727 (23%)	16,408 (100%)

B. 截至 2010 年 6 月 30 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 June 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	4,043	764	4,807
豁免計劃 Exempted Schemes	306	1,766	2,072
總數 Total	4,349	2,530	6,879

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	5	5	10
總數 Total	6	5	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	127,525	3,608	131,324	193	258,849	3,801
(ii) 界定利益計劃 Defined Benefit Schemes	9,612	106	130,577	136	140,189	242
(iii) 總數 Total	137,137	3,714	261,901	329	399,038	4,043

(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	8,977	297	847	3	9,824	300
(ii) 界定利益計劃 Defined Benefit Schemes	333	5	0	0	333	5
(iii) 分項總數 Sub-total	9,310	302	847	3	10,157	305
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	11,923	342	17,366	94	29,289	436
(ii) 界定利益計劃 Defined Benefit Schemes	100	5	6,647	18	6,747	23
(iii) 分項總數 Sub-total	12,023	347	24,013	112	36,036	459
(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)	20,900	639	18,213	97	39,113	736
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	433	10	6,647	18	7,080	28
(iii) 總數 Total	21,333	649	24,860	115	46,193	764

(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	8,977	297	847	3	9,824	300
(ii) 界定利益計劃 Defined Benefit Schemes	333	5	0	0	333	5
(iii) 分項總數 Sub-total	9,310	302	847	3	10,157	305
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	139,448	3,950	148,690	287	288,138	4,237
(ii) 界定利益計劃 Defined Benefit Schemes	9,712	111	137,224	154	146,936	265
(iii) 分項總數 Sub-total	149,160	4,061	285,914	441	435,074	4,502
(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)	148,425	4,247	149,537	290	297,962	4,537
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	10,045	116	137,224	154	147,269	270
(iii) 總數 Total	158,470	4,363	286,761	444	445,231	4,807

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	4,024	3,548	6,934	191	10,958	3,739
(ii) 界定利益計劃 Defined Benefit Schemes	362	104	4,394	136	4,756	240
(iii) 總數 Total	4,386	3,652	11,328	327	15,714	3,979

(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	290	14	3	49	293
(ii) 界定利益計劃 Defined Benefit Schemes	4	5	0	0	4	5
(iii) 分項總數 Sub-total	39	295	14	3	53	298
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	94	336	482	85	576	421
(ii) 界定利益計劃 Defined Benefit Schemes	1	5	64	18	65	23
(iii) 分項總數 Sub-total	95	341	546	103	641	444
(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)	129	626	496	88	625	714
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5	10	64	18	69	28
(iii) 總數 Total	134	636	560	106	694	742

(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	290	14	3	49	293
(ii) 界定利益計劃 Defined Benefit Schemes	4	5	0	0	4	5
(iii) 分項總數 Sub-total	39	295	14	3	53	298
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,118	3,884	7,416	276	11,534	4,160
(ii) 界定利益計劃 Defined Benefit Schemes	363	109	4,458	154	4,821	263
(iii) 分項總數 Sub-total	4,481	3,993	11,874	430	16,355	4,423
(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)	4,153	4,174	7,430	279	11,583	4,453
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	367	114	4,458	154	4,825	268
(iii) 總數 Total	4,520	4,288	11,888	433	16,408	4,721

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	46,264	3,548	70,558	191	116,822	3,739
(ii) 界定利益計劃 Defined Benefit Schemes	5,281	104	80,933	136	86,214	240
(iii) 總數 Total	51,545	3,652	151,491	327	203,036	3,979

(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	290	124	3	1,196	293
(ii) 界定利益計劃 Defined Benefit Schemes	124	5	0	0	124	5
(iii) 分項總數 Sub-total	1,196	295	124	3	1,320	298
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	1,963	336	4,035	85	5,998	421
(ii) 界定利益計劃 Defined Benefit Schemes	31	5	2,184	18	2,215	23
(iii) 分項總數 Sub-total	1,994	341	6,219	103	8,213	444
(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)	3,035	626	4,159	88	7,194	714
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	155	10	2,184	18	2,339	28
(iii) 總數 Total	3,190	636	6,343	106	9,533	742

(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	290	124	3	1,196	293
(ii) 界定利益計劃 Defined Benefit Schemes	124	5	0	0	124	5
(iii) 分項總數 Sub-total	1,196	295	124	3	1,320	298
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	48,227	3,884	74,593	276	122,820	4,160
(ii) 界定利益計劃 Defined Benefit Schemes	5,312	109	83,117	154	88,429	263
(iii) 分項總數 Sub-total	53,539	3,993	157,710	430	211,249	4,423
(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)	49,299	4,174	74,717	279	124,016	4,453
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,436	114	83,117	154	88,553	268
(iii) 總數 Total	54,735	4,288	157,834	433	212,569	4,721

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	31	141
50 - < 100	5	38	356
100 - < 500	12	341	3,471
500 - < 1,000	4	154	3,140
1,000 - < 1,500	3	176	3,450
1,500 - < 2,000	1	236	1,639
>= 2,000	8	2,676	39,348
總數 Total	41	3,652	51,545

(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	22	104	199
50 - < 100	3	14	90
100 - < 500	8	125	417
500 - < 1,000	3	117	702
1,000 - < 1,500	3	13	113
1,500 - < 2,000	1	36	139
>= 2,000	7	227	1,530
總數 Total	47	636	3,190

(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	27	135	340
50 - < 100	6	52	446
100 - < 500	13	466	3,888
500 - < 1,000	5	271	3,842
1,000 - < 1,500	3	189	3,563
1,500 - < 2,000	1	272	1,778
>= 2,000	8	2,903	40,878
總數 Total	63	4,288	54,735

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	64
5 - < 10	13	94
10 - < 20	32	449
20 - < 30	22	508
30 - < 40	17	585
40 - < 50	14	609
50 - < 60	24	1,312
60 - < 70	18	1,171
70 - < 80	7	535
80 - < 100	13	1,116
>= 100	143	145,048
總數 Total	327	151,491

(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	45	87
5 - < 10	12	84
10 - < 20	4	53
20 - < 30	7	173
30 - < 40	5	171
40 - < 50	5	219
50 - < 60	4	216
60 - < 70	2	127
70 - < 80	1	72
80 - < 100	3	249
>= 100	18	4,892
總數 Total	106	6,343

(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	151
5 - < 10	25	178
10 - < 20	36	502
20 - < 30	29	681
30 - < 40	22	756
40 - < 50	19	828
50 - < 60	28	1,528
60 - < 70	20	1,298
70 - < 80	8	607
80 - < 100	16	1,365
>= 100	161	149,940
總數 Total	433	157,834

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	632	338
1 - < 2	633	922
2 - < 10	1,570	7,741
10 - < 20	399	5,534
20 - < 30	151	3,664
30 - < 50	178	6,839
50 - < 100	172	11,381
>=100	244	166,617
總數 Total	3,979	203,036

(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	104
1 - < 2	116	170
2 - < 10	230	1,024
10 - < 20	46	655
20 - < 30	20	485
30 - < 50	19	736
50 - < 100	13	862
>=100	22	5,497
總數 Total	742	9,533

(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	908	442
1 - < 2	749	1,092
2 - < 10	1,800	8,765
10 - < 20	445	6,189
20 - < 30	171	4,149
30 - < 50	197	7,575
50 - < 100	185	12,243
>=100	266	172,114
總數 Total	4,721	212,569

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