

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2012年3月31日，總共有5,333個職業退休計劃，包括4,459個職業退休註冊計劃及874個職業退休豁免計劃。在這5,333個職業退休計劃中，有4,062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 2012, there were 5,333 ORSO schemes, comprising of 4,459 ORSO registered schemes and 874 ORSO exempted schemes. Out of these 5,333 ORSO schemes 4,062 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	3,713 (91%)	349 (9%)	4,062 (100%)
沒有強積金豁免 Non-MPF Exempted	1,027 (81%)	244 (19%)	1,271 (100%)
總數 Total	4,740 (89%)	593 (11%)	5,333 (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	28 (1%)	3,947 (97%)	87 (2%)	4,062 (100%)
沒有強積金豁免 Non-MPF Exempted	347 (27%)	835 (66%)	89 (7%)	1,271 (100%)
總數 Total	375 (7%)	4,782 (90%)	176 (3%)	5,333 (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	3,426 (84%)	636 (16%)	4,062 (100%)
沒有強積金豁免 Non-MPF Exempted	659 (52%)	612 (48%)	1,271 (100%)
總數 Total	4,085 (77%)	1,248 (23%)	5,333 (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	3,470 (92%)	313 (8%)	3,783 (100%)
沒有強積金豁免 Non-MPF Exempted	575 (85%)	101 (15%)	676 (100%)
總數 Total	4,045 (91%)	414 (9%)	4,459 (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	359,045 (98%)	8,006 (2%)	367,051 (100%)
沒有強積金豁免 Non-MPF Exempted	43,958 (99%)	400 (1%)	44,358 (100%)
總數 Total	403,003 (98%)	8,406 (2%)	411,409 (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	12,593 (79%)	3,334 (21%)	15,927 (100%)
沒有強積金豁免 Non-MPF Exempted	546 (73%)	204 (27%)	750 (100%)
總數 Total	13,139 (79%)	3,538 (21%)	16,677 (100%)

B. 截至 2012 年 3 月 31 日的職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2012

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	3,783	676	4,459
豁免計劃 Exempted Schemes	279	595	874
總數 Total	4,062	1,271	5,333

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	5	1	6
總數 Total	5	1	6

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	108,690	3,372	125,405	184	234,095	3,556
(ii) 界定利益計劃 Defined Benefit Schemes	7,795	98	125,161	129	132,956	227
(iii) 總數 Total	116,485	3,470	250,566	313	367,051	3,783

(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	8,271	253	809	3	9,080	256
(ii) 界定利益計劃 Defined Benefit Schemes	273	5	0	0	273	5
(iii) 分項總數 Sub-total	8,544	258	809	3	9,353	261
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	10,642	312	17,946	83	28,588	395
(ii) 界定利益計劃 Defined Benefit Schemes	174	5	6,243	15	6,417	20
(iii) 分項總數 Sub-total	10,816	317	24,189	98	35,005	415
(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)	18,913	565	18,755	86	37,668	651
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	447	10	6,243	15	6,690	25
(iii) 總數 Total	19,360	575	24,998	101	44,358	676

(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	8,271	253	809	3	9,080	256
(ii) 界定利益計劃 Defined Benefit Schemes	273	5	0	0	273	5
(iii) 分項總數 Sub-total	8,544	258	809	3	9,353	261
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	119,332	3,684	143,351	267	262,683	3,951
(ii) 界定利益計劃 Defined Benefit Schemes	7,969	103	131,404	144	139,373	247
(iii) 分項總數 Sub-total	127,301	3,787	274,755	411	402,056	4,198
(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)	127,603	3,937	144,160	270	271,763	4,207
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	8,242	108	131,404	144	139,646	252
(iii) 總數 Total	135,845	4,045	275,564	414	411,409	4,459

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	3,704	3,012	6,655	183	10,359	3,195
(ii) 界定利益計劃 Defined Benefit Schemes	323	97	5,245	129	5,568	226
(iii) 總數 Total	4,027	3,109	11,900	312	15,927	3,421

(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	41	251	14	3	55	254
(ii) 界定利益計劃 Defined Benefit Schemes	2	5	0	0	2	5
(iii) 分項總數 Sub-total	43	256	14	3	57	259
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	104	307	544	79	648	386
(ii) 界定利益計劃 Defined Benefit Schemes	1	5	44	15	45	20
(iii) 分項總數 Sub-total	105	312	588	94	693	406
(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)	145	558	558	82	703	640
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	10	44	15	47	25
(iii) 總數 Total	148	568	602	97	750	665

(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	41	251	14	3	55	254
(ii) 界定利益計劃 Defined Benefit Schemes	2	5	0	0	2	5
(iii) 分項總數 Sub-total	43	256	14	3	57	259
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,808	3,319	7,199	262	11,007	3,581
(ii) 界定利益計劃 Defined Benefit Schemes	324	102	5,289	144	5,613	246
(iii) 分項總數 Sub-total	4,132	3,421	12,488	406	16,620	3,827
(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)	3,849	3,570	7,213	265	11,062	3,835
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	326	107	5,289	144	5,615	251
(iii) 總數 Total	4,175	3,677	12,502	409	16,677	4,086

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	48,882	3,012	98,891	183	147,773	3,195
(ii) 界定利益計劃 Defined Benefit Schemes	5,385	97	99,792	129	105,177	226
(iii) 總數 Total	54,267	3,109	198,683	312	252,950	3,421

(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	1,128	251	134	3	1,262	254
(ii) 界定利益計劃 Defined Benefit Schemes	151	5	0	0	151	5
(iii) 分項總數 Sub-total	1,279	256	134	3	1,413	259
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,037	307	5,660	79	7,697	386
(ii) 界定利益計劃 Defined Benefit Schemes	30	5	2,468	15	2,498	20
(iii) 分項總數 Sub-total	2,067	312	8,128	94	10,195	406
(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)	3,165	558	5,794	82	8,959	640
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	181	10	2,468	15	2,649	25
(iii) 總數 Total	3,346	568	8,262	97	11,608	665

(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	1,128	251	134	3	1,262	254
(ii) 界定利益計劃 Defined Benefit Schemes	151	5	0	0	151	5
(iii) 分項總數 Sub-total	1,279	256	134	3	1,413	259
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	50,919	3,319	104,551	262	155,470	3,581
(ii) 界定利益計劃 Defined Benefit Schemes	5,415	102	102,260	144	107,675	246
(iii) 分項總數 Sub-total	56,334	3,421	206,811	406	263,145	3,827
(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)	52,047	3,570	104,685	265	156,732	3,835
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,566	107	102,260	144	107,826	251
(iii) 總數 Total	57,613	3,677	206,945	409	264,558	4,086

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	10	26	215
50 - < 100	2	6	134
100 - < 500	14	347	3,899
500 - < 1,000	3	63	2,319
1,000 - < 1,500	4	253	4,795
1,500 - < 2,000	1	206	1,417
>= 2,000	7	2,208	41,488
總數 Total	41	3,109	54,267

(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	19	86	191
50 - < 100	1	1	12
100 - < 500	11	128	515
500 - < 1,000	2	105	790
1,000 - < 1,500	4	14	173
1,500 - < 2,000	1	33	151
>= 2,000	6	201	1,514
總數 Total	44	568	3,346

(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	112	406
50 - < 100	2	7	146
100 - < 500	15	475	4,414
500 - < 1,000	4	168	3,109
1,000 - < 1,500	4	267	4,968
1,500 - < 2,000	1	239	1,568
>= 2,000	7	2,409	43,002
總數 Total	60	3,677	57,613

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	20	48
5 - < 10	12	83
10 - < 20	24	350
20 - < 30	19	483
30 - < 40	9	306
40 - < 50	19	855
50 - < 60	10	538
60 - < 70	15	1,005
70 - < 80	11	824
80 - < 100	23	2,083
>= 100	150	192,108
總數 Total	312	198,683

(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	29	61
5 - < 10	12	81
10 - < 20	11	145
20 - < 30	4	115
30 - < 40	4	137
40 - < 50	4	180
50 - < 60	7	386
60 - < 70	1	62
70 - < 80	2	151
80 - < 100	3	257
>= 100	20	6,687
總數 Total	97	8,262

(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	49	109
5 - < 10	24	164
10 - < 20	35	495
20 - < 30	23	598
30 - < 40	13	443
40 - < 50	23	1,035
50 - < 60	17	924
60 - < 70	16	1,067
70 - < 80	13	975
80 - < 100	26	2,340
>= 100	170	198,795
總數 Total	409	206,945

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	449	239
1 - < 2	487	719
2 - < 10	1,355	6,761
10 - < 20	373	5,283
20 - < 30	152	3,723
30 - < 50	173	6,797
50 - < 100	189	13,597
>=100	243	215,831
總數 Total	3,421	252,950

(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	216	88
1 - < 2	97	144
2 - < 10	220	996
10 - < 20	54	734
20 - < 30	17	433
30 - < 50	20	765
50 - < 100	17	1,115
>=100	24	7,333
總數 Total	665	11,608

(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	665	327
1 - < 2	584	863
2 - < 10	1,575	7,757
10 - < 20	427	6,017
20 - < 30	169	4,156
30 - < 50	193	7,562
50 - < 100	206	14,712
>=100	267	223,164
總數 Total	4,086	264,558

註：統計數字乃根據截至2012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 2012 in respect of registered schemes.