

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2013年9月30日，總共有5,130個職業退休計劃，包括4,255個職業退休註冊計劃及875個職業退休豁免計劃。在這5,130個職業退休計劃中，有3,891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 September 2013, there were 5,130 ORSO schemes, comprising of 4,255 ORSO registered schemes and 875 ORSO exempted schemes. Out of these 5,130 ORSO schemes 3,891 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	3,554 (91%)	337 (9%)	3,891 (100%)
沒有強積金豁免 Non-MPF Exempted	1,002 (81%)	237 (19%)	1,239 (100%)
總數 Total	4,556 (89%)	574 (11%)	5,130 (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	27 (1%)	3,780 (97%)	84 (2%)	3,891 (100%)
沒有強積金豁免 Non-MPF Exempted	333 (27%)	804 (65%)	102 (8%)	1,239 (100%)
總數 Total	360 (7%)	4,584 (89%)	186 (4%)	5,130 (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	3,276 (84%)	615 (16%)	3,891 (100%)
沒有強積金豁免 Non-MPF Exempted	631 (51%)	608 (49%)	1,239 (100%)
總數 Total	3,907 (76%)	1,223 (24%)	5,130 (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	3,317 (92%)	304 (8%)	3,621 (100%)
沒有強積金豁免 Non-MPF Exempted	540 (85%)	94 (15%)	634 (100%)
總數 Total	3,857 (91%)	398 (9%)	4,255 (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	345,071 (98%)	7,809 (2%)	352,880 (100%)
沒有強積金豁免 Non-MPF Exempted	43,494 (98%)	1,059 (2%)	44,553 (100%)
總數 Total	388,565 (98%)	8,868 (2%)	397,433 (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	14,027 (79%)	3,684 (21%)	17,711 (100%)
沒有強積金豁免 Non-MPF Exempted	613 (74%)	217 (26%)	830 (100%)
總數 Total	14,640 (79%)	3,901 (21%)	18,541 (100%)

B. 截至 2013 年 9 月 30 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 September 2013

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	3,621	634	4,255
豁免計劃 Exempted Schemes	270	605	875
總數 Total	3,891	1,239	5,130

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	3	2	5
總數 Total	3	2	5

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	99,469	3,223	122,900	179	222,369	3,402
(ii) 界定利益計劃 Defined Benefit Schemes	6,833	94	123,678	125	130,511	219
(iii) 總數 Total	106,302	3,317	246,578	304	352,880	3,621

(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	7,692	232	799	3	8,491	235
(ii) 界定利益計劃 Defined Benefit Schemes	246	5	0	0	246	5
(iii) 分項總數 Sub-total	7,938	237	799	3	8,737	240
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	9,859	298	20,033	77	29,892	375
(ii) 界定利益計劃 Defined Benefit Schemes	162	5	5,762	14	5,924	19
(iii) 分項總數 Sub-total	10,021	303	25,795	91	35,816	394
(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)	17,551	530	20,832	80	38,383	610
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	408	10	5,762	14	6,170	24
(iii) 總數 Total	17,959	540	26,594	94	44,553	634

(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	7,692	232	799	3	8,491	235
(ii) 界定利益計劃 Defined Benefit Schemes	246	5	0	0	246	5
(iii) 分項總數 Sub-total	7,938	237	799	3	8,737	240
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	109,328	3,521	142,933	256	252,261	3,777
(ii) 界定利益計劃 Defined Benefit Schemes	6,995	99	129,440	139	136,435	238
(iii) 分項總數 Sub-total	116,323	3,620	272,373	395	388,696	4,015
(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)	117,020	3,753	143,732	259	260,752	4,012
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	7,241	104	129,440	139	136,681	243
(iii) 總數 Total	124,261	3,857	273,172	398	397,433	4,255

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	3,962	3,209	7,280	179	11,242	3,388
(ii) 界定利益計劃 Defined Benefit Schemes	320	93	6,149	125	6,469	218
(iii) 總數 Total	4,282	3,302	13,429	304	17,711	3,606

(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	48	230	13	3	61	233
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	48	235	13	3	61	238
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	105	291	625	72	730	363
(ii) 界定利益計劃 Defined Benefit Schemes	1	5	38	14	39	19
(iii) 分項總數 Sub-total	106	296	663	86	769	382
(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)	153	521	638	75	791	596
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	1	10	38	14	39	24
(iii) 總數 Total	154	531	676	89	830	620

(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	48	230	13	3	61	233
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	48	235	13	3	61	238
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,067	3,500	7,905	251	11,972	3,751
(ii) 界定利益計劃 Defined Benefit Schemes	321	98	6,187	139	6,508	237
(iii) 分項總數 Sub-total	4,388	3,598	14,092	390	18,480	3,988
(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)	4,115	3,730	7,918	254	12,033	3,984
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	321	103	6,187	139	6,508	242
(iii) 總數 Total	4,436	3,833	14,105	393	18,541	4,226

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	53,777	3,209	110,677	179	164,454	3,388
(ii) 界定利益計劃 Defined Benefit Schemes	5,261	93	101,330	125	106,591	218
(iii) 總數 Total	59,038	3,302	212,007	304	271,045	3,606

(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	1,061	230	152	3	1,213	233
(ii) 界定利益計劃 Defined Benefit Schemes	135	5	0	0	135	5
(iii) 分項總數 Sub-total	1,196	235	152	3	1,348	238
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,041	291	5,700	72	7,741	363
(ii) 界定利益計劃 Defined Benefit Schemes	32	5	2,759	14	2,791	19
(iii) 分項總數 Sub-total	2,073	296	8,459	86	10,532	382
(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)	3,102	521	5,852	75	8,954	596
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	167	10	2,759	14	2,926	24
(iii) 總數 Total	3,269	531	8,611	89	11,880	620

(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	1,061	230	152	3	1,213	233
(ii) 界定利益計劃 Defined Benefit Schemes	135	5	0	0	135	5
(iii) 分項總數 Sub-total	1,196	235	152	3	1,348	238
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	55,818	3,500	116,377	251	172,195	3,751
(ii) 界定利益計劃 Defined Benefit Schemes	5,293	98	104,089	139	109,382	237
(iii) 分項總數 Sub-total	61,111	3,598	220,466	390	281,577	3,988
(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)	56,879	3,730	116,529	254	173,408	3,984
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,428	103	104,089	139	109,517	242
(iii) 總數 Total	62,307	3,833	220,618	393	282,925	4,226

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	22	170
50 - < 100	4	29	312
100 - < 500	11	299	2,945
500 - < 1,000	5	67	3,379
1,000 - < 1,500	5	443	6,193
1,500 - < 2,000	0	0	0
>= 2,000	7	2,442	46,039
總數 Total	40	3,302	59,038

(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	82	178
50 - < 100	1	1	10
100 - < 500	9	121	520
500 - < 1,000	3	95	741
1,000 - < 1,500	5	43	295
1,500 - < 2,000	0	0	0
>= 2,000	6	189	1,525
總數 Total	43	531	3,269

(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	26	104	348
50 - < 100	4	30	322
100 - < 500	12	420	3,465
500 - < 1,000	6	162	4,120
1,000 - < 1,500	5	486	6,488
1,500 - < 2,000	0	0	0
>= 2,000	7	2,631	47,564
總數 Total	60	3,833	62,307

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	19	44
5 - < 10	13	84
10 - < 20	23	349
20 - < 30	12	303
30 - < 40	15	520
40 - < 50	13	585
50 - < 60	10	543
60 - < 70	17	1,128
70 - < 80	12	889
80 - < 100	21	1,876
>= 100	149	205,686
總數 Total	304	212,007

(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	27	66
5 - < 10	9	58
10 - < 20	9	129
20 - < 30	3	82
30 - < 40	4	129
40 - < 50	3	136
50 - < 60	6	333
60 - < 70	3	192
70 - < 80	5	374
80 - < 100	2	182
>= 100	18	6,930
總數 Total	89	8,611

(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	46	110
5 - < 10	22	142
10 - < 20	32	478
20 - < 30	15	385
30 - < 40	19	649
40 - < 50	16	721
50 - < 60	16	876
60 - < 70	20	1,320
70 - < 80	17	1,263
80 - < 100	23	2,058
>= 100	167	212,616
總數 Total	393	220,618

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	463	249
1 - < 2	490	731
2 - < 10	1,457	7,471
10 - < 20	419	5,850
20 - < 30	153	3,756
30 - < 50	168	6,562
50 - < 100	201	14,237
>=100	255	232,189
總數 Total	3,606	271,045

(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	201	78
1 - < 2	91	132
2 - < 10	199	862
10 - < 20	51	718
20 - < 30	16	407
30 - < 50	21	805
50 - < 100	20	1,409
>=100	21	7,469
總數 Total	620	11,880

(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	664	327
1 - < 2	581	863
2 - < 10	1,656	8,333
10 - < 20	470	6,568
20 - < 30	169	4,163
30 - < 50	189	7,367
50 - < 100	221	15,646
>=100	276	239,658
總數 Total	4,226	282,925

註：統計數字乃根據截至2013年9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 September 2013 in respect of registered schemes.