

職業退休計劃統計數字

ORSO SCHEMES STATISTICS

統計數字

Statistics

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Statistics on ORSO Schemes as at 31 December 2013

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2013年12月31日，總共有5,103個職業退休計劃，包括4,230個職業退休註冊計劃及873個職業退休豁免計劃。在這5,103個職業退休計劃中，有3,868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 December 2013, there were 5,103 ORSO schemes, comprising of 4,230 ORSO registered schemes and 873 ORSO exempted schemes. Out of these 5,103 ORSO schemes 3,868 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	3,533 (91%)	335 (9%)	3,868 (100%)
沒有強積金豁免 Non-MPF Exempted	998 (81%)	237 (19%)	1,235 (100%)
總數 Total	4,531 (89%)	572 (11%)	5,103 (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	26 (1%)	3,758 (97%)	84 (2%)	3,868 (100%)
沒有強積金豁免 Non-MPF Exempted	332 (27%)	798 (65%)	105 (8%)	1,235 (100%)
總數 Total	358 (7%)	4,556 (89%)	189 (4%)	5,103 (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	3,255 (84%)	613 (16%)	3,868 (100%)
沒有強積金豁免 Non-MPF Exempted	626 (51%)	609 (49%)	1,235 (100%)
總數 Total	3,881 (76%)	1,222 (24%)	5,103 (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	3,296 (92%)	305 (8%)	3,601 (100%)
沒有強積金豁免 Non-MPF Exempted	538 (86%)	91 (14%)	629 (100%)
總數 Total	3,834 (91%)	396 (9%)	4,230 (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	340,358 (97%)	11,139 (3%)	351,497 (100%)
沒有強積金豁免 Non-MPF Exempted	43,624 (98%)	1,108 (2%)	44,732 (100%)
總數 Total	383,982 (97%)	12,247 (3%)	396,229 (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	14,085 (79%)	3,696 (21%)	17,781 (100%)
沒有強積金豁免 Non-MPF Exempted	601 (74%)	207 (26%)	808 (100%)
總數 Total	14,686 (79%)	3,903 (21%)	18,589 (100%)

B. 截至 2013 年 12 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 December 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	3,601	629	4,230
豁免計劃 Exempted Schemes	267	606	873
總數 Total	3,868	1,235	5,103

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	2	1	3
總數 Total	2	1	3

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	98,539	3,202	122,693	180	221,232	3,382
(ii) 界定利益計劃 Defined Benefit Schemes	6,817	94	123,448	125	130,265	219
(iii) 總數 Total	105,356	3,296	246,141	305	351,497	3,601

(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	7,672	231	798	3	8,470	234
(ii) 界定利益計劃 Defined Benefit Schemes	246	5	0	0	246	5
(iii) 分項總數 Sub-total	7,918	236	798	3	8,716	239
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	9,746	297	20,381	74	30,127	371
(ii) 界定利益計劃 Defined Benefit Schemes	162	5	5,727	14	5,889	19
(iii) 分項總數 Sub-total	9,908	302	26,108	88	36,016	390
(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)	17,418	528	21,179	77	38,597	605
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	408	10	5,727	14	6,135	24
(iii) 總數 Total	17,826	538	26,906	91	44,732	629

(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	7,672	231	798	3	8,470	234
(ii) 界定利益計劃 Defined Benefit Schemes	246	5	0	0	246	5
(iii) 分項總數 Sub-total	7,918	236	798	3	8,716	239
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	108,285	3,499	143,074	254	251,359	3,753
(ii) 界定利益計劃 Defined Benefit Schemes	6,979	99	129,175	139	136,154	238
(iii) 分項總數 Sub-total	115,264	3,598	272,249	393	387,513	3,991
(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)	115,957	3,730	143,872	257	259,829	3,987
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	7,225	104	129,175	139	136,400	243
(iii) 總數 Total	123,182	3,834	273,047	396	396,229	4,230

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	3,976	3,188	7,329	180	11,305	3,368
(ii) 界定利益計劃 Defined Benefit Schemes	319	93	6,157	124	6,476	217
(iii) 總數 Total	4,295	3,281	13,486	304	17,781	3,585

(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	229	13	3	61	232
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	48	234	13	3	61	237
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	105	289	603	69	708	358
(ii) 界定利益計劃 Defined Benefit Schemes	1	5	38	14	39	19
(iii) 分項總數 Sub-total	106	294	641	83	747	377
(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	518	616	72	769	590
(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	528	654	86	808	614

(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	229	13	3	61	232
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	48	234	13	3	61	237
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,081	3,477	7,932	249	12,013	3,726
(ii) 界定利益計劃 Defined Benefit Schemes	320	98	6,195	138	6,515	236
(iii) 分項總數 Sub-total	4,401	3,575	14,127	387	18,528	3,962
(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)	4,129	3,706	7,945	252	12,074	3,958
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	320	103	6,195	138	6,515	241
(iii) 總數 Total	4,449	3,809	14,140	390	18,589	4,199

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	54,183	3,188	111,434	180	165,617	3,368
(ii) 界定利益計劃 Defined Benefit Schemes	5,262	93	102,143	124	107,405	217
(iii) 總數 Total	59,445	3,281	213,577	304	273,022	3,585

(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	1,058	229	153	3	1,211	232
(ii) 界定利益計劃 Defined Benefit Schemes	135	5	0	0	135	5
(iii) 分項總數 Sub-total	1,193	234	153	3	1,346	237
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,022	289	5,712	69	7,734	358
(ii) 界定利益計劃 Defined Benefit Schemes	32	5	2,761	14	2,793	19
(iii) 分項總數 Sub-total	2,054	294	8,473	83	10,527	377
(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)	3,080	518	5,865	72	8,945	590
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	167	10	2,761	14	2,928	24
(iii) 總數 Total	3,247	528	8,626	86	11,873	614

(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	1,058	229	153	3	1,211	232
(ii) 界定利益計劃 Defined Benefit Schemes	135	5	0	0	135	5
(iii) 分項總數 Sub-total	1,193	234	153	3	1,346	237
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	56,205	3,477	117,146	249	173,351	3,726
(ii) 界定利益計劃 Defined Benefit Schemes	5,294	98	104,904	138	110,198	236
(iii) 分項總數 Sub-total	61,499	3,575	222,050	387	283,549	3,962
(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)	57,263	3,706	117,299	252	174,562	3,958
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,429	103	104,904	138	110,333	241
(iii) 總數 Total	62,692	3,809	222,203	390	284,895	4,199

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	169
50 - < 100	4	29	312
100 - < 500	11	297	2,957
500 - < 1,000	5	68	3,478
1,000 - < 1,500	5	441	6,256
1,500 - < 2,000	0	0	0
>= 2,000	7	2,424	46,273
總數 Total	40	3,281	59,445

(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	176
50 - < 100	2	1	10
100 - < 500	9	120	518
500 - < 1,000	3	95	741
1,000 - < 1,500	5	43	294
1,500 - < 2,000	0	0	0
>= 2,000	6	187	1,508
總數 Total	44	528	3,247

(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	345
50 - < 100	4	30	322
100 - < 500	12	417	3,475
500 - < 1,000	6	163	4,219
1,000 - < 1,500	5	484	6,550
1,500 - < 2,000	0	0	0
>= 2,000	7	2,611	47,781
總數 Total	60	3,809	62,692

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	14	90
10 - < 20	23	351
20 - < 30	10	255
30 - < 40	18	628
40 - < 50	11	498
50 - < 60	9	487
60 - < 70	17	1,124
70 - < 80	12	888
80 - < 100	21	1,864
>= 100	150	207,348
總數 Total	304	213,577

(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	25	58
5 - < 10	11	70
10 - < 20	8	119
20 - < 30	3	82
30 - < 40	4	136
40 - < 50	3	132
50 - < 60	6	335
60 - < 70	4	258
70 - < 80	4	303
80 - < 100	0	0
>= 100	18	7,133
總數 Total	86	8,626

(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	44	102
5 - < 10	25	160
10 - < 20	31	470
20 - < 30	13	337
30 - < 40	22	764
40 - < 50	14	630
50 - < 60	15	822
60 - < 70	21	1,382
70 - < 80	16	1,191
80 - < 100	21	1,864
>= 100	168	214,481
總數 Total	390	222,203

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	243
1 - < 2	484	722
2 - < 10	1,455	7,458
10 - < 20	420	5,883
20 - < 30	152	3,736
30 - < 50	168	6,576
50 - < 100	200	14,172
>=100	257	234,232
總數 Total	3,585	273,022

(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	200	79
1 - < 2	91	133
2 - < 10	198	857
10 - < 20	49	695
20 - < 30	16	407
30 - < 50	21	807
50 - < 100	18	1,223
>=100	21	7,672
總數 Total	614	11,873

(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	649	322
1 - < 2	575	855
2 - < 10	1,653	8,315
10 - < 20	469	6,578
20 - < 30	168	4,143
30 - < 50	189	7,383
50 - < 100	218	15,395
>=100	278	241,904
總數 Total	4,199	284,895

註：統計數字乃根據截至 2013 年 12 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 December 2013 in respect of registered schemes.