

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 March 2014

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2014年3月31日，總共有5,042個職業退休計劃，包括4,197個職業退休註冊計劃及845個職業退休豁免計劃。在這5,042個職業退休計劃中，有3,836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 2014, there were 5,042 ORSO schemes, comprising of 4,197 ORSO registered schemes and 845 ORSO exempted schemes. Out of these 5,042 ORSO schemes 3,836 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	3,503 (91%)	333 (9%)	3,836 (100%)
沒有強積金豁免 Non-MPF Exempted	972 (81%)	234 (19%)	1,206 (100%)
總數 Total	4,475 (89%)	567 (11%)	5,042 (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	25 (1%)	3,728 (97%)	83 (2%)	3,836 (100%)
沒有強積金豁免 Non-MPF Exempted	326 (27%)	774 (64%)	106 (9%)	1,206 (100%)
總數 Total	351 (7%)	4,502 (89%)	189 (4%)	5,042 (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	3,228 (84%)	608 (16%)	3,836 (100%)
沒有強積金豁免 Non-MPF Exempted	623 (52%)	583 (48%)	1,206 (100%)
總數 Total	3,851 (76%)	1,191 (24%)	5,042 (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	3,268 (91%)	304 (9%)	3,572 (100%)
沒有強積金豁免 Non-MPF Exempted	533 (85%)	92 (15%)	625 (100%)
總數 Total	3,801 (91%)	396 (9%)	4,197 (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	339,031 (97%)	11,147 (3%)	350,178 (100%)
沒有強積金豁免 Non-MPF Exempted	43,451 (98%)	1,109 (2%)	44,560 (100%)
總數 Total	382,482 (97%)	12,256 (3%)	394,738 (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	14,079 (79%)	3,703 (21%)	17,782 (100%)
沒有強積金豁免 Non-MPF Exempted	607 (74%)	208 (26%)	815 (100%)
總數 Total	14,686 (79%)	3,911 (21%)	18,597 (100%)

B. 截至 2014 年 3 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2014

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	3,572	625	4,197
豁免計劃 Exempted Schemes	264	581	845
總數 Total	3,836	1,206	5,042

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	4	1	5
總數 Total	4	1	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	97,765	3,174	122,421	180	220,186	3,354
(ii) 界定利益計劃 Defined Benefit Schemes	6,605	94	123,387	124	129,992	218
(iii) 總數 Total	104,370	3,268	245,808	304	350,178	3,572

(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	7,640	227	798	3	8,438	230
(ii) 界定利益計劃 Defined Benefit Schemes	246	5	0	0	246	5
(iii) 分項總數 Sub-total	7,886	232	798	3	8,684	235
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	9,662	296	20,422	75	30,084	371
(ii) 界定利益計劃 Defined Benefit Schemes	66	5	5,726	14	5,792	19
(iii) 分項總數 Sub-total	9,728	301	26,148	89	35,876	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)	17,302	523	21,220	78	38,522	601
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	312	10	5,726	14	6,038	24
(iii) 總數 Total	17,614	533	26,946	92	44,560	625

(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	7,640	227	798	3	8,438	230
(ii) 界定利益計劃 Defined Benefit Schemes	246	5	0	0	246	5
(iii) 分項總數 Sub-total	7,886	232	798	3	8,684	235
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	107,427	3,470	142,843	255	250,270	3,725
(ii) 界定利益計劃 Defined Benefit Schemes	6,671	99	129,113	138	135,784	237
(iii) 分項總數 Sub-total	114,098	3,569	271,956	393	386,054	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)	115,067	3,697	143,641	258	258,708	3,955
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,917	104	129,113	138	136,030	242
(iii) 總數 Total	121,984	3,801	272,754	396	394,738	4,197

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	3,967	3,158	7,325	180	11,292	3,338
(ii) 界定利益計劃 Defined Benefit Schemes	313	93	6,177	123	6,490	216
(iii) 總數 Total	4,280	3,251	13,502	303	17,782	3,554

(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	225	13	3	61	228
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	48	230	13	3	61	233
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	106	287	607	70	713	357
(ii) 界定利益計劃 Defined Benefit Schemes	3	5	38	14	41	19
(iii) 分項總數 Sub-total	109	292	645	84	754	376
(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)	154	512	620	73	774	585
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	10	38	14	41	24
(iii) 總數 Total	157	522	658	87	815	609

(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	225	13	3	61	228
(ii) 界定利益計劃 Defined Benefit Schemes	0	5	0	0	0	5
(iii) 分項總數 Sub-total	48	230	13	3	61	233
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,073	3,445	7,932	250	12,005	3,695
(ii) 界定利益計劃 Defined Benefit Schemes	316	98	6,215	137	6,531	235
(iii) 分項總數 Sub-total	4,389	3,543	14,147	387	18,536	3,930
(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)	4,121	3,670	7,945	253	12,066	3,923
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	316	103	6,215	137	6,531	240
(iii) 總數 Total	4,437	3,773	14,160	390	18,597	4,163

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	54,363	3,158	111,967	180	166,330	3,338
(ii) 界定利益計劃 Defined Benefit Schemes	5,399	93	102,489	123	107,888	216
(iii) 總數 Total	59,762	3,251	214,456	303	274,218	3,554

(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	1,053	225	153	3	1,206	228
(ii) 界定利益計劃 Defined Benefit Schemes	135	5	0	0	135	5
(iii) 分項總數 Sub-total	1,188	230	153	3	1,341	233
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,037	287	5,717	70	7,754	357
(ii) 界定利益計劃 Defined Benefit Schemes	31	5	2,771	14	2,802	19
(iii) 分項總數 Sub-total	2,068	292	8,488	84	10,556	376
(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)	3,090	512	5,870	73	8,960	585
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	166	10	2,771	14	2,937	24
(iii) 總數 Total	3,256	522	8,641	87	11,897	609

(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	1,053	225	153	3	1,206	228
(ii) 界定利益計劃 Defined Benefit Schemes	135	5	0	0	135	5
(iii) 分項總數 Sub-total	1,188	230	153	3	1,341	233
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	56,400	3,445	117,684	250	174,084	3,695
(ii) 界定利益計劃 Defined Benefit Schemes	5,430	98	105,260	137	110,690	235
(iii) 分項總數 Sub-total	61,830	3,543	222,944	387	284,774	3,930
(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)	57,453	3,670	117,837	253	175,290	3,923
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,565	103	105,260	137	110,825	240
(iii) 總數 Total	63,018	3,773	223,097	390	286,115	4,163

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	321
100 - < 500	11	293	3,014
500 - < 1,000	5	68	3,544
1,000 - < 1,500	5	438	6,285
1,500 - < 2,000	0	0	0
>= 2,000	7	2,401	46,428
總數 Total	40	3,251	59,762

(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	175
50 - < 100	2	1	10
100 - < 500	9	117	518
500 - < 1,000	3	93	738
1,000 - < 1,500	5	43	295
1,500 - < 2,000	0	0	0
>= 2,000	6	186	1,520
總數 Total	44	522	3,256

(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	331
100 - < 500	12	410	3,532
500 - < 1,000	6	161	4,282
1,000 - < 1,500	5	481	6,580
1,500 - < 2,000	0	0	0
>= 2,000	7	2,587	47,948
總數 Total	60	3,773	63,018

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	91
10 - < 20	23	352
20 - < 30	10	255
30 - < 40	17	589
40 - < 50	10	454
50 - < 60	10	541
60 - < 70	16	1,057
70 - < 80	13	961
80 - < 100	21	1,864
>= 100	150	208,248
總數 Total	303	214,456

(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	12	77
10 - < 20	8	119
20 - < 30	2	52
30 - < 40	5	167
40 - < 50	3	129
50 - < 60	6	335
60 - < 70	4	258
70 - < 80	3	224
80 - < 100	1	89
>= 100	18	7,133
總數 Total	87	8,641

(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	26	168
10 - < 20	31	471
20 - < 30	12	307
30 - < 40	22	756
40 - < 50	13	583
50 - < 60	16	876
60 - < 70	20	1,315
70 - < 80	16	1,185
80 - < 100	22	1,953
>= 100	168	215,381
總數 Total	390	223,097

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	431	231
1 - < 2	481	716
2 - < 10	1,448	7,447
10 - < 20	417	5,843
20 - < 30	152	3,741
30 - < 50	165	6,444
50 - < 100	201	14,165
>=100	259	235,631
總數 Total	3,554	274,218

(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	198	78
1 - < 2	88	129
2 - < 10	198	858
10 - < 20	50	709
20 - < 30	14	358
30 - < 50	21	801
50 - < 100	19	1,292
>=100	21	7,672
總數 Total	609	11,897

(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	629	309
1 - < 2	569	845
2 - < 10	1,646	8,305
10 - < 20	467	6,552
20 - < 30	166	4,099
30 - < 50	186	7,245
50 - < 100	220	15,457
>=100	280	243,303
總數 Total	4,163	286,115

註：統計數字乃根據截至2014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 2014 in respect of registered schemes.