

# 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2014年12月31日，總共有4,936個職業退休計劃，包括4,101個職業退休註冊計劃及835個職業退休豁免計劃。在這4,936個職業退休計劃中，有3,758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 2014, there were 4,936 ORSO schemes, comprising of 4,101 ORSO registered schemes and 835 ORSO exempted schemes. Out of these 4,936 ORSO schemes 3,758 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	3,437 (91%)	321 (9%)	3,758 (100%)
沒有強積金豁免 Non-MPF Exempted	949 (81%)	229 (19%)	1,178 (100%)
總數 Total	4,386 (89%)	550 (11%)	4,936 (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%)	3,650 (97%)	83 (2%)	3,758 (100%)
沒有強積金豁免 Non-MPF Exempted	310 (26%)	764 (65%)	104 (9%)	1,178 (100%)
總數 Total	335 (7%)	4,414 (89%)	187 (4%)	4,936 (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	3,487 (93%)	271 (7%)	3,758 (100%)
沒有強積金豁免 Non-MPF Exempted	664 (56%)	514 (44%)	1,178 (100%)
總數 Total	4,151 (84%)	785 (16%)	4,936 (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	3,206 (92%)	294 (8%)	3,500 (100%)
沒有強積金豁免 Non-MPF Exempted	507 (84%)	94 (16%)	601 (100%)
總數 Total	3,713 (91%)	388 (9%)	4,101 (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	332,790 (97%)	9,104 (3%)	341,894 (100%)
沒有強積金豁免 Non-MPF Exempted	41,065 (97%)	1,165 (3%)	42,230 (100%)
總數 Total	373,855 (97%)	10,269 (3%)	384,124 (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	13,728 (79%)	3,720 (21%)	17,448 (100%)
沒有強積金豁免 Non-MPF Exempted	513 (74%)	183 (26%)	696 (100%)
總數 Total	14,241 (78%)	3,903 (22%)	18,144 (100%)

B. 截至 2014 年 12 月 31 日的 職業退休計劃統計數字  
**Statistics on ORSO Schemes as at 31 December 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	3,500	601	4,101
豁免計劃 Exempted Schemes	258	577	835
總數 Total	3,758	1,178	4,936

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	11	5	16
總數 Total	11	5	16

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
<b>受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	91,254	3,117	122,035	174	213,289	3,291
(ii) 界定利益計劃 Defined Benefit Schemes	6,172	89	122,433	120	128,605	209
(iii) 總數 Total	97,426	3,206	244,468	294	341,894	3,500

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	7,630	212	848	3	8,478	215
(ii) 界定利益計劃 Defined Benefit Schemes	203	4	0	0	203	4
(iii) 分項總數 Subtotal	7,833	216	848	3	8,681	219
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	9,324	286	18,907	78	28,231	364
(ii) 界定利益計劃 Defined Benefit Schemes	61	5	5,257	13	5,318	18
(iii) 分項總數 Subtotal	9,385	291	24,164	91	33,549	382
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	16,954	498	19,755	81	36,709	579
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	264	9	5,257	13	5,521	22
(iii) 總數 Total	17,218	507	25,012	94	42,230	601

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	7,630	212	848	3	8,478	215
(ii) 界定利益計劃 Defined Benefit Schemes	203	4	0	0	203	4
(iii) 分項總數 Subtotal	7,833	216	848	3	8,681	219
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	100,578	3,403	140,942	252	241,520	3,655
(ii) 界定利益計劃 Defined Benefit Schemes	6,233	94	127,690	133	133,923	227
(iii) 分項總數 Subtotal	106,811	3,497	268,632	385	375,443	3,882
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	108,208	3,615	141,790	255	249,998	3,870
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,436	98	127,690	133	134,126	231
(iii) 總數 Total	114,644	3,713	269,480	388	384,124	4,101

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
<b>受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	3,948	3,097	7,645	174	11,593	3,271
(ii) 界定利益計劃 Defined Benefit Schemes	293	87	5,562	118	5,855	205
(iii) 總數 Total	4,241	3,184	13,207	292	17,448	3,476



## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	45	211	16	3	61	214
(ii) 界定利益計劃 Defined Benefit Schemes	1	4	0	0	1	4
(iii) 分項總數 Subtotal	46	215	16	3	62	218
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	110	280	493	66	603	346
(ii) 界定利益計劃 Defined Benefit Schemes	2	5	29	12	31	17
(iii) 分項總數 Subtotal	112	285	522	78	634	363
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	155	491	509	69	664	560
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	9	29	12	32	21
(iii) 總數 Total	158	500	538	81	696	581

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	45	211	16	3	61	214
(ii) 界定利益計劃 Defined Benefit Schemes	1	4	0	0	1	4
(iii) 分項總數 Subtotal	46	215	16	3	62	218
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	4,058	3,377	8,138	240	12,196	3,617
(ii) 界定利益計劃 Defined Benefit Schemes	295	92	5,591	130	5,886	222
(iii) 分項總數 Subtotal	4,353	3,469	13,729	370	18,082	3,839
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	4,103	3,588	8,154	243	12,257	3,831
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	296	96	5,591	130	5,887	226
(iii) 總數 Total	4,399	3,684	13,745	373	18,144	4,057

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
<b>受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	56,463	3,097	120,610	174	177,073	3,271
(ii) 界定利益計劃 Defined Benefit Schemes	5,147	87	95,834	118	100,981	205
(iii) 總數 Total	61,610	3,184	216,444	292	278,054	3,476

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	1,039	211	173	3	1,212	214
(ii) 界定利益計劃 Defined Benefit Schemes	129	4	0	0	129	4
(iii) 分項總數 Subtotal	1,168	215	173	3	1,341	218
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	2,012	280	5,550	66	7,562	346
(ii) 界定利益計劃 Defined Benefit Schemes	30	5	2,789	12	2,819	17
(iii) 分項總數 Subtotal	2,042	285	8,339	78	10,381	363
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	3,051	491	5,723	69	8,774	560
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	159	9	2,789	12	2,948	21
(iii) 總數 Total	3,210	500	8,512	81	11,722	581

## (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
<b>(A) 受保險安排所管限 Regulated by Insurance Arrangement</b>						
(i) 界定供款計劃 Defined Contribution Schemes	1,039	211	173	3	1,212	214
(ii) 界定利益計劃 Defined Benefit Schemes	129	4	0	0	129	4
(iii) 分項總數 Subtotal	1,168	215	173	3	1,341	218
<b>(B) 受信託所管限 Governed by Trust</b>						
(i) 界定供款計劃 Defined Contribution Schemes	58,475	3,377	126,160	240	184,635	3,617
(ii) 界定利益計劃 Defined Benefit Schemes	5,177	92	98,623	130	103,800	222
(iii) 分項總數 Subtotal	63,652	3,469	224,783	370	288,435	3,839
<b>(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</b>						
(i) 界定供款計劃 Defined Contribution Schemes (A)(i)+(B)(i)	59,514	3,588	126,333	243	185,847	3,831
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,306	96	98,623	130	103,929	226
(iii) 總數 Total	64,820	3,684	224,956	373	289,776	4,057

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	21	183
50 - < 100	4	29	320
100 - < 500	11	282	3,067
500 - < 1,000	4	20	2,787
1,000 - < 1,500	6	474	7,381
1,500 - < 2,000	0	0	0
>= 2,000	7	2,358	47,872
<b>總數 Total</b>	<b>40</b>	<b>3,184</b>	<b>61,610</b>

(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	84	194
50 - < 100	2	1	9
100 - < 500	9	112	508
500 - < 1,000	2	69	673
1,000 - < 1,500	6	53	309
1,500 - < 2,000	0	0	0
>= 2,000	6	181	1,517
<b>總數 Total</b>	<b>44</b>	<b>500</b>	<b>3,210</b>

(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	105	377
50 - < 100	4	30	329
100 - < 500	12	394	3,575
500 - < 1,000	5	89	3,460
1,000 - < 1,500	6	527	7,690
1,500 - < 2,000	0	0	0
>= 2,000	7	2,539	49,389
<b>總數 Total</b>	<b>60</b>	<b>3,684</b>	<b>64,820</b>

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	21	43
5 - < 10	18	127
10 - < 20	14	210
20 - < 30	16	400
30 - < 40	11	374
40 - < 50	11	490
50 - < 60	13	711
60 - < 70	10	649
70 - < 80	14	1,039
80 - < 100	22	1,995
>= 100	142	210,406
<b>總數 Total</b>	292	216,444

(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	23	56
5 - < 10	11	69
10 - < 20	7	98
20 - < 30	2	47
30 - < 40	7	239
40 - < 50	2	90
50 - < 60	2	116
60 - < 70	5	330
70 - < 80	3	222
80 - < 100	3	252
>= 100	16	6,993
<b>總數 Total</b>	81	8,512

(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	99
5 - < 10	29	196
10 - < 20	21	308
20 - < 30	18	447
30 - < 40	18	613
40 - < 50	13	580
50 - < 60	15	827
60 - < 70	15	979
70 - < 80	17	1,261
80 - < 100	25	2,247
>= 100	158	217,399
<b>總數 Total</b>	<b>373</b>	<b>224,956</b>



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	416	228
1 - < 2	446	664
2 - < 10	1,415	7,301
10 - < 20	416	5,784
20 - < 30	156	3,796
30 - < 50	171	6,592
50 - < 100	199	14,078
>=100	257	239,611
<b>總數 Total</b>	<b>3,476</b>	<b>278,054</b>

(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	191	76
1 - < 2	79	115
2 - < 10	191	851
10 - < 20	48	680
20 - < 30	13	322
30 - < 50	21	775
50 - < 100	19	1,380
>=100	19	7,523
<b>總數 Total</b>	<b>581</b>	<b>11,722</b>

(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	607	304
1 - < 2	525	779
2 - < 10	1,606	8,152
10 - < 20	464	6,464
20 - < 30	169	4,118
30 - < 50	192	7,367
50 - < 100	218	15,458
>=100	276	247,134
<b>總數 Total</b>	<b>4,057</b>	<b>289,776</b>

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