

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2015年9月30日，總共有4,771個職業退休計劃，包括4,021個職業退休註冊計劃及750個職業退休豁免計劃。在這4,771個職業退休計劃中，有3,667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 2015, there were 4,771 ORSO schemes, comprising of 4,021 ORSO registered schemes and 750 ORSO exempted schemes. Out of these 4,771 ORSO schemes 3,667 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	3,357 (92%)	310 (8%)	3,667 (100%)
沒有強積金豁免 Non-MPF Exempted	911 (83%)	193 (17%)	1,104 (100%)
總數 Total	4,268 (89%)	503 (11%)	4,771 (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%)	3,561 (97%)	81 (2%)	3,667 (100%)
沒有強積金豁免 Non-MPF Exempted	280 (25%)	738 (67%)	86 (8%)	1,104 (100%)
總數 Total	305 (6%)	4,299 (90%)	167 (4%)	4,771 (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	3,412 (93%)	255 (7%)	3,667 (100%)
沒有強積金豁免 Non-MPF Exempted	665 (60%)	439 (40%)	1,104 (100%)
總數 Total	4,077 (85%)	694 (15%)	4,771 (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	3,126 (91%)	293 (9%)	3,419 (100%)
沒有強積金豁免 Non-MPF Exempted	494 (82%)	108 (18%)	602 (100%)
總數 Total	3,620 (90%)	401 (10%)	4,021 (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	335,259 (98%)	8,376 (2%)	343,635 (100%)
沒有強積金豁免 Non-MPF Exempted	41,041 (98%)	827 (2%)	41,868 (100%)
總數 Total	376,300 (98%)	9,203 (2%)	385,503 (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	15,082 (79%)	3,970 (21%)	19,052 (100%)
沒有強積金豁免 Non-MPF Exempted	580 (74%)	209 (26%)	789 (100%)
總數 Total	15,662 (79%)	4,179 (21%)	19,841 (100%)

B. 截至 2015 年 9 月 30 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 September 2015

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	3,419	602	4,021
豁免計劃 Exempted Schemes	248	502	750
總數 Total	3,667	1,104	4,771

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	9	14
總數 Total	5	9	14

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	86,417	3,041	127,760	175	214,177	3,216
(ii) 界定利益計劃 Defined Benefit Schemes	6,016	85	123,442	118	129,458	203
(iii) 總數 Total	92,433	3,126	251,202	293	343,635	3,419

(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	7,739	208	948	2	8,687	210
(ii) 界定利益計劃 Defined Benefit Schemes	189	3	0	0	189	3
(iii) 分項總數 Subtotal	7,928	211	948	2	8,876	213
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	9,133	278	18,635	94	27,768	372
(ii) 界定利益計劃 Defined Benefit Schemes	132	5	5,092	12	5,224	17
(iii) 分項總數 Subtotal	9,265	283	23,727	106	32,992	389
(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)	16,872	486	19,583	96	36,455	582
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	321	8	5,092	12	5,413	20
(iii) 總數 Total	17,193	494	24,675	108	41,868	602

(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	7,739	208	948	2	8,687	210
(ii) 界定利益計劃 Defined Benefit Schemes	189	3	0	0	189	3
(iii) 分項總數 Subtotal	7,928	211	948	2	8,876	213
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	95,550	3,319	146,395	269	241,945	3,588
(ii) 界定利益計劃 Defined Benefit Schemes	6,148	90	128,534	130	134,682	220
(iii) 分項總數 Subtotal	101,698	3,409	274,929	399	376,627	3,808
(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)	103,289	3,527	147,343	271	250,632	3,798
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,337	93	128,534	130	134,871	223
(iii) 總數 Total	109,626	3,620	275,877	401	385,503	4,021

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	3,956	3,029	7,961	173	11,917	3,202
(ii) 界定利益計劃 Defined Benefit Schemes	369	83	6,766	117	7,135	200
(iii) 總數 Total	4,325	3,112	14,727	290	19,052	3,402

(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	44	207	16	2	60	209
(ii) 界定利益計劃 Defined Benefit Schemes	1	3	0	0	1	3
(iii) 分項總數 Subtotal	45	210	16	2	61	212
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	137	274	561	67	698	341
(ii) 界定利益計劃 Defined Benefit Schemes	2	5	28	12	30	17
(iii) 分項總數 Subtotal	139	279	589	79	728	358
(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)	181	481	577	69	758	550
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	8	28	12	31	20
(iii) 總數 Total	184	489	605	81	789	570

(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	44	207	16	2	60	209
(ii) 界定利益計劃 Defined Benefit Schemes	1	3	0	0	1	3
(iii) 分項總數 Subtotal	45	210	16	2	61	212
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	4,093	3,303	8,522	240	12,615	3,543
(ii) 界定利益計劃 Defined Benefit Schemes	371	88	6,794	129	7,165	217
(iii) 分項總數 Subtotal	4,464	3,391	15,316	369	19,780	3,760
(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)	4,137	3,510	8,538	242	12,675	3,752
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	372	91	6,794	129	7,166	220
(iii) 總數 Total	4,509	3,601	15,332	371	19,841	3,972

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	56,845	3,029	128,980	173	185,825	3,202
(ii) 界定利益計劃 Defined Benefit Schemes	4,951	83	98,586	117	103,537	200
(iii) 總數 Total	61,796	3,112	227,566	290	289,362	3,402

(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	1,029	207	181	2	1,210	209
(ii) 界定利益計劃 Defined Benefit Schemes	121	3	0	0	121	3
(iii) 分項總數 Subtotal	1,150	210	181	2	1,331	212
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,289	274	6,103	67	8,392	341
(ii) 界定利益計劃 Defined Benefit Schemes	27	5	2,734	12	2,761	17
(iii) 分項總數 Subtotal	2,316	279	8,837	79	11,153	358
(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)	3,318	481	6,284	69	9,602	550
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	148	8	2,734	12	2,882	20
(iii) 總數 Total	3,466	489	9,018	81	12,484	570

(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	1,030	207	181	2	1,211	209
(ii) 界定利益計劃 Defined Benefit Schemes	120	3	0	0	120	3
(iii) 分項總數 Subtotal	1,150	210	181	2	1,331	212
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	59,134	3,303	135,083	240	194,217	3,543
(ii) 界定利益計劃 Defined Benefit Schemes	4,978	88	101,320	129	106,298	217
(iii) 分項總數 Subtotal	64,112	3,391	236,403	369	300,515	3,760
(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)	60,164	3,510	135,264	242	195,428	3,752
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,098	91	101,320	129	106,418	220
(iii) 總數 Total	65,262	3,601	236,584	371	301,846	3,972

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	20	186
50 - < 100	4	29	285
100 - < 500	11	274	3,129
500 - < 1,000	4	59	2,714
1,000 - < 1,500	5	384	5,832
1,500 - < 2,000	1	30	1,531
>= 2,000	7	2,316	48,119
總數 Total	40	3,112	61,796

(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	81	189
50 - < 100	3	6	24
100 - < 500	8	108	502
500 - < 1,000	3	81	802
1,000 - < 1,500	4	34	223
1,500 - < 2,000	1	3	34
>= 2,000	6	176	1,692
總數 Total	44	489	3,466

(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	101	375
50 - < 100	4	35	309
100 - < 500	12	382	3,631
500 - < 1,000	5	140	3,516
1,000 - < 1,500	5	418	6,055
1,500 - < 2,000	1	33	1,565
>= 2,000	7	2,492	49,811
總數 Total	60	3,601	65,262

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	34
5 - < 10	19	137
10 - < 20	13	198
20 - < 30	13	330
30 - < 40	15	504
40 - < 50	13	581
50 - < 60	11	609
60 - < 70	10	648
70 - < 80	13	986
80 - < 100	17	1,516
>= 100	146	222,023
總數 Total	290	227,566

(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	49
5 - < 10	10	68
10 - < 20	6	83
20 - < 30	3	66
30 - < 40	7	230
40 - < 50	3	138
50 - < 60	2	112
60 - < 70	3	204
70 - < 80	5	383
80 - < 100	2	170
>= 100	17	7,515
總數 Total	81	9,018

(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	43	83
5 - < 10	29	205
10 - < 20	19	281
20 - < 30	16	396
30 - < 40	22	734
40 - < 50	16	719
50 - < 60	13	721
60 - < 70	13	852
70 - < 80	18	1,369
80 - < 100	19	1,686
>= 100	163	229,538
總數 Total	371	236,584

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	403	220
1 - < 2	422	624
2 - < 10	1,364	7,017
10 - < 20	433	6,054
20 - < 30	162	3,971
30 - < 50	172	6,722
50 - < 100	191	13,540
>=100	255	251,214
總數 Total	3,402	289,362

(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	184	72
1 - < 2	73	106
2 - < 10	194	881
10 - < 20	40	582
20 - < 30	17	414
30 - < 50	22	834
50 - < 100	18	1,348
>=100	22	8,247
總數 Total	570	12,484

(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	587	292
1 - < 2	495	730
2 - < 10	1,558	7,898
10 - < 20	473	6,636
20 - < 30	179	4,385
30 - < 50	194	7,556
50 - < 100	209	14,888
>=100	277	259,461
總數 Total	3,972	301,846

註：統計數字乃根據截至 2015 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 2015 in respect of registered schemes.