

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2016年3月31日，總共有4,709個職業退休計劃，包括3,969個職業退休註冊計劃及740個職業退休豁免計劃。在這4,709個職業退休計劃中，有3,619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 2016, there were 4,709 ORSO schemes, comprising of 3,969 ORSO registered schemes and 740 ORSO exempted schemes. Out of these 4,709 ORSO schemes 3,619 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	3,313 (92%)	306 (8%)	3,619 (100%)
沒有強積金豁免 Non-MPF Exempted	908 (83%)	182 (17%)	1,090 (100%)
總數 Total	4,221 (90%)	488 (10%)	4,709 (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%)	3,513 (97%)	81 (2%)	3,619 (100%)
沒有強積金豁免 Non-MPF Exempted	274 (25%)	728 (67%)	88 (8%)	1,090 (100%)
總數 Total	299 (6%)	4,241 (90%)	169 (4%)	4,709 (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	3,365 (93%)	254 (7%)	3,619 (100%)
沒有強積金豁免 Non-MPF Exempted	662 (61%)	428 (39%)	1,090 (100%)
總數 Total	4,027 (86%)	682 (14%)	4,709 (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	3,085 (91%)	287 (9%)	3,372 (100%)
沒有強積金豁免 Non-MPF Exempted	485 (81%)	112 (19%)	597 (100%)
總數 Total	3,570 (90%)	399 (10%)	3,969 (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	330,402 (98%)	6,259 (2%)	336,661 (100%)
沒有強積金豁免 Non-MPF Exempted	40,940 (98%)	819 (2%)	41,759 (100%)
總數 Total	371,342 (98%)	7,078 (2%)	378,420 (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	15,146 (79%)	3,931 (21%)	19,077 (100%)
沒有強積金豁免 Non-MPF Exempted	596 (73%)	218 (27%)	814 (100%)
總數 Total	15,742 (79%)	4,149 (21%)	19,891 (100%)

B. 截至 2016 年 3 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2016

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	3,372	597	3,969
豁免計劃 Exempted Schemes	247	493	740
總數 Total	3,619	1,090	4,709

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	15	2	17
總數 Total	15	2	17

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	81,524	3,001	127,195	172	208,719	3,173
(ii) 界定利益計劃 Defined Benefit Schemes	5,870	84	122,072	115	127,942	199
(iii) 總數 Total	87,394	3,085	249,267	287	336,661	3,372

(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	7,708	204	948	2	8,656	206
(ii) 界定利益計劃 Defined Benefit Schemes	189	3	0	0	189	3
(iii) 分項總數 Subtotal	7,897	207	948	2	8,845	209
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	8,724	274	19,065	100	27,789	374
(ii) 界定利益計劃 Defined Benefit Schemes	117	4	5,008	10	5,125	14
(iii) 分項總數 Subtotal	8,841	278	24,073	110	32,914	388
(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)	16,432	478	20,013	102	36,445	580
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	306	7	5,008	10	5,314	17
(iii) 總數 Total	16,738	485	25,021	112	41,759	597

(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	7,708	204	948	2	8,656	206
(ii) 界定利益計劃 Defined Benefit Schemes	189	3	0	0	189	3
(iii) 分項總數 Subtotal	7,897	207	948	2	8,845	209
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	90,248	3,275	146,260	272	236,508	3,547
(ii) 界定利益計劃 Defined Benefit Schemes	5,987	88	127,080	125	133,067	213
(iii) 分項總數 Subtotal	96,235	3,363	273,340	397	369,575	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)	97,956	3,479	147,208	274	245,164	3,753
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6,176	91	127,080	125	133,256	216
(iii) 總數 Total	104,132	3,570	274,288	399	378,420	3,969

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	3,689	2,977	8,056	170	11,745	3,147
(ii) 界定利益計劃 Defined Benefit Schemes	367	82	6,965	114	7,332	196
(iii) 總數 Total	4,056	3,059	15,021	284	19,077	3,343

(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	203	16	2	60	205
(ii) 界定利益計劃 Defined Benefit Schemes	1	3	0	0	1	3
(iii) 分項總數 Subtotal	45	206	16	2	61	208
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	139	265	583	70	722	335
(ii) 界定利益計劃 Defined Benefit Schemes	5	4	26	10	31	14
(iii) 分項總數 Subtotal	144	269	609	80	753	349
(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)	183	468	599	72	782	540
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	6	7	26	10	32	17
(iii) 總數 Total	189	475	625	82	814	557

(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	203	16	2	60	205
(ii) 界定利益計劃 Defined Benefit Schemes	1	3	0	0	1	3
(iii) 分項總數 Subtotal	45	206	16	2	61	208
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,828	3,242	8,639	240	12,467	3,482
(ii) 界定利益計劃 Defined Benefit Schemes	372	86	6,991	124	7,363	210
(iii) 分項總數 Subtotal	4,200	3,328	15,630	364	19,830	3,692
(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)	3,872	3,445	8,655	242	12,527	3,687
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	373	89	6,991	124	7,364	213
(iii) 總數 Total	4,245	3,534	15,646	366	19,891	3,900

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	52,488	2,977	129,838	170	182,326	3,147
(ii) 界定利益計劃 Defined Benefit Schemes	4,928	82	102,956	114	107,884	196
(iii) 總數 Total	57,416	3,059	232,794	284	290,210	3,343

(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	1,026	203	181	2	1,207	205
(ii) 界定利益計劃 Defined Benefit Schemes	120	3	0	0	120	3
(iii) 分項總數 Subtotal	1,146	206	181	2	1,327	208
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,116	265	6,234	70	8,350	335
(ii) 界定利益計劃 Defined Benefit Schemes	27	4	2,616	10	2,643	14
(iii) 分項總數 Subtotal	2,143	269	8,850	80	10,993	349
(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)	3,142	468	6,415	72	9,557	540
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	147	7	2,616	10	2,763	17
(iii) 總數 Total	3,289	475	9,031	82	12,320	557

(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	1,026	203	181	2	1,207	205
(ii) 界定利益計劃 Defined Benefit Schemes	120	3	0	0	120	3
(iii) 分項總數 Subtotal	1,146	206	181	2	1,327	208
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	54,604	3,242	136,072	240	190,676	3,482
(ii) 界定利益計劃 Defined Benefit Schemes	4,955	86	105,572	124	110,527	210
(iii) 分項總數 Subtotal	59,559	3,328	241,644	364	301,203	3,692
(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)	55,630	3,445	136,253	242	191,883	3,687
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,075	89	105,572	124	110,647	213
(iii) 總數 Total	60,705	3,534	241,825	366	302,530	3,900

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	185
50 - < 100	5	29	362
100 - < 500	10	272	2,993
500 - < 1,000	4	67	3,045
1,000 - < 1,500	5	369	6,178
1,500 - < 2,000	1	30	1,625
>= 2,000	6	2,272	43,028
總數 Total	39	3,059	57,416

(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	18	80	213
50 - < 100	2	5	18
100 - < 500	8	106	497
500 - < 1,000	3	79	807
1,000 - < 1,500	4	32	218
1,500 - < 2,000	1	3	36
>= 2,000	6	170	1,500
總數 Total	42	475	3,289

(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	25	100	398
50 - < 100	5	34	380
100 - < 500	11	378	3,490
500 - < 1,000	5	146	3,852
1,000 - < 1,500	5	401	6,396
1,500 - < 2,000	1	33	1,661
>= 2,000	6	2,442	44,528
總數 Total	58	3,534	60,705

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	15	33
5 - < 10	17	121
10 - < 20	12	177
20 - < 30	12	297
30 - < 40	14	477
40 - < 50	12	540
50 - < 60	10	550
60 - < 70	11	721
70 - < 80	15	1,147
80 - < 100	15	1,357
>= 100	151	227,374
總數 Total	284	232,794

(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	26	55
5 - < 10	9	59
10 - < 20	7	96
20 - < 30	4	95
30 - < 40	5	163
40 - < 50	3	141
50 - < 60	2	114
60 - < 70	3	204
70 - < 80	4	307
80 - < 100	1	87
>= 100	18	7,710
總數 Total	82	9,031

(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	41	88
5 - < 10	26	180
10 - < 20	19	273
20 - < 30	16	392
30 - < 40	19	640
40 - < 50	15	681
50 - < 60	12	664
60 - < 70	14	925
70 - < 80	19	1,454
80 - < 100	16	1,444
>= 100	169	235,084
總數 Total	366	241,825

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	388	216
1 - < 2	415	617
2 - < 10	1,343	6,936
10 - < 20	425	5,940
20 - < 30	161	3,926
30 - < 50	173	6,784
50 - < 100	186	13,252
>=100	252	252,539
總數 Total	3,343	290,210

(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	179	69
1 - < 2	72	105
2 - < 10	189	849
10 - < 20	42	599
20 - < 30	18	440
30 - < 50	19	729
50 - < 100	15	1,100
>=100	23	8,429
總數 Total	557	12,320

(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	567	285
1 - < 2	487	722
2 - < 10	1,532	7,785
10 - < 20	467	6,539
20 - < 30	179	4,366
30 - < 50	192	7,513
50 - < 100	201	14,352
>=100	275	260,968
總數 Total	3,900	302,530

註：統計數字乃根據截至2016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 2016 in respect of registered schemes.