

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12月31日，總共有4,580個職業退休計劃，包括3,897個職業退休註冊計劃及683個職業退休豁免計劃。在這4,580個職業退休計劃中，有3,521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 2016, there were 4,580 ORSO schemes, comprising of 3,897 ORSO registered schemes and 683 ORSO exempted schemes. Out of these 4,580 ORSO schemes 3,521 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	3,229 (92%)	292 (8%)	3,521 (100%)
沒有強積金豁免 Non-MPF Exempted	887 (84%)	172 (16%)	1,059 (100%)
總數 Total	4,116 (90%)	464 (10%)	4,580 (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	24 (1%)	3,419 (97%)	78 (2%)	3,521 (100%)
沒有強積金豁免 Non-MPF Exempted	262 (25%)	719 (68%)	78 (7%)	1,059 (100%)
總數 Total	286 (6%)	4,138 (90%)	156 (3%)	4,580 (100%)*

* 因四捨五入的關係，各項百分比的總和未必等同總計數字。

Percentage may not sum up to the total due to rounding.

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	3,287 (93%)	234 (7%)	3,521 (100%)
沒有強積金豁免 Non-MPF Exempted	658 (62%)	401 (38%)	1,059 (100%)
總數 Total	3,945 (86%)	635 (14%)	4,580 (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	3,013 (91%)	281 (9%)	3,294 (100%)
沒有強積金豁免 Non-MPF Exempted	479 (79%)	124 (21%)	603 (100%)
總數 Total	3,492 (90%)	405 (10%)	3,897 (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	326,545 (98%)	6,849 (2%)	333,394 (100%)
沒有強積金豁免 Non-MPF Exempted	41,497 (97%)	1,075 (3%)	42,572 (100%)
總數 Total	368,042 (98%)	7,924 (2%)	375,966 (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	20,732 (78%)	5,828 (22%)	26,560 (100%)
沒有強積金豁免 Non-MPF Exempted	643 (65%)	351 (35%)	994 (100%)
總數 Total	21,375 (78%)	6,179 (22%)	27,554 (100%)

B. 截至 2016 年 12 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 December 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	3,294	603	3,897
豁免計劃 Exempted Schemes	227	456	683
總數 Total	3,521	1,059	4,580

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	1	0	1
受信託所管限 Governed by Trust	7	4	11
總數 Total	8	4	12

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	74,722	2,932	133,165	168	207,887	3,100
(ii) 界定利益計劃 Defined Benefit Schemes	5,563	81	119,944	113	125,507	194
(iii) 總數 Total	80,285	3,013	253,109	281	333,394	3,294

(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	7,893	196	1,142	2	9,035	198
(ii) 界定利益計劃 Defined Benefit Schemes	173	3	0	0	173	3
(iii) 分項總數 Subtotal	8,066	199	1,142	2	9,208	201
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	8,544	276	19,695	111	28,239	387
(ii) 界定利益計劃 Defined Benefit Schemes	111	4	5,014	11	5,125	15
(iii) 分項總數 Subtotal	8,655	280	24,709	122	33,364	402
(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)	16,437	472	20,837	113	37,274	585
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	284	7	5,014	11	5,298	18
(iii) 總數 Total	16,721	479	25,851	124	42,572	603

(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	7,893	196	1,142	2	9,035	198
(ii) 界定利益計劃 Defined Benefit Schemes	173	3	0	0	173	3
(iii) 分項總數 Subtotal	8,066	199	1,142	2	9,208	201
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	83,266	3,208	152,860	279	236,126	3,487
(ii) 界定利益計劃 Defined Benefit Schemes	5,674	85	124,958	124	130,632	209
(iii) 分項總數 Subtotal	88,940	3,293	277,818	403	366,758	3,696
(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)	91,159	3,404	154,002	281	245,161	3,685
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,847	88	124,958	124	130,805	212
(iii) 總數 Total	97,006	3,492	278,960	405	375,966	3,897

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	3,569	2,910	14,944	168	18,513	3,078
(ii) 界定利益計劃 Defined Benefit Schemes	303	80	7,744	113	8,047	193
(iii) 總數 Total	3,872	2,990	22,688	281	26,560	3,271

(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	194	19	2	63	196
(ii) 界定利益計劃 Defined Benefit Schemes	0	3	0	0	0	3
(iii) 分項總數 Subtotal	44	197	19	2	63	199
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	191	267	661	78	852	345
(ii) 界定利益計劃 Defined Benefit Schemes	4	4	75	11	79	15
(iii) 分項總數 Subtotal	195	271	736	89	931	360
(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)	235	461	680	80	915	541
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4	7	75	11	79	18
(iii) 總數 Total	239	468	755	91	994	559

(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	194	19	2	63	196
(ii) 界定利益計劃 Defined Benefit Schemes	0	3	0	0	0	3
(iii) 分項總數 Subtotal	44	197	19	2	63	199
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,760	3,177	15,605	246	19,365	3,423
(ii) 界定利益計劃 Defined Benefit Schemes	307	84	7,819	124	8,126	208
(iii) 分項總數 Subtotal	4,067	3,261	23,424	370	27,491	3,631
(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)	3,804	3,371	15,624	248	19,428	3,619
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	307	87	7,819	124	8,126	211
(iii) 總數 Total	4,111	3,458	23,443	372	27,554	3,830

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	50,071	2,910	135,215	168	185,286	3,078
(ii) 界定利益計劃 Defined Benefit Schemes	4,690	80	104,320	113	109,010	193
(iii) 總數 Total	54,761	2,990	239,535	281	294,296	3,271

(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	977	194	193	2	1,170	196
(ii) 界定利益計劃 Defined Benefit Schemes	108	3	0	0	108	3
(iii) 分項總數 Subtotal	1,085	197	193	2	1,278	199
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,958	267	6,079	78	10,037	345
(ii) 界定利益計劃 Defined Benefit Schemes	27	4	2,538	11	2,565	15
(iii) 分項總數 Subtotal	3,985	271	8,617	89	12,602	360
(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)	4,935	461	6,272	80	11,207	541
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	135	7	2,538	11	2,673	18
(iii) 總數 Total	5,070	468	8,810	91	13,880	559

(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	977	194	193	2	1,170	196
(ii) 界定利益計劃 Defined Benefit Schemes	108	3	0	0	108	3
(iii) 分項總數 Subtotal	1,085	197	193	2	1,278	199
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	54,029	3,177	141,294	246	195,323	3,423
(ii) 界定利益計劃 Defined Benefit Schemes	4,717	84	106,858	124	111,575	208
(iii) 分項總數 Subtotal	58,746	3,261	248,152	370	306,898	3,631
(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)	55,006	3,371	141,487	248	196,493	3,619
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,825	87	106,858	124	111,683	211
(iii) 總數 Total	59,831	3,458	248,345	372	308,176	3,830

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	7	18	145
50 - < 100	6	27	412
100 - < 500	10	253	3,096
500 - < 1,000	4	66	2,944
1,000 - < 1,500	4	351	4,632
1,500 - < 2,000	2	50	1,764
>= 2,000	6	2,225	41,768
總數 Total	39	2,990	54,761

(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	17	71	163
50 - < 100	3	13	86
100 - < 500	7	99	487
500 - < 1,000	3	77	755
1,000 - < 1,500	4	32	210
1,500 - < 2,000	2	7	1,759
>= 2,000	6	169	1,610
總數 Total	42	468	5,070

(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	23	89	308
50 - < 100	7	40	498
100 - < 500	11	352	3,583
500 - < 1,000	5	143	3,699
1,000 - < 1,500	4	383	4,842
1,500 - < 2,000	2	57	3,523
>= 2,000	6	2,394	43,378
總數 Total	58	3,458	59,831

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	17	34
5 - < 10	15	116
10 - < 20	12	181
20 - < 30	14	351
30 - < 40	14	489
40 - < 50	12	551
50 - < 60	13	716
60 - < 70	12	778
70 - < 80	13	984
80 - < 100	16	1,450
>= 100	143	233,885
總數 Total	281	239,535

(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	29	50
5 - < 10	10	66
10 - < 20	9	129
20 - < 30	5	128
30 - < 40	4	135
40 - < 50	4	180
50 - < 60	3	165
60 - < 70	6	398
70 - < 80	2	148
80 - < 100	3	272
>= 100	16	7,139
總數 Total	91	8,810

(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	46	84
5 - < 10	25	182
10 - < 20	21	310
20 - < 30	19	479
30 - < 40	18	624
40 - < 50	16	731
50 - < 60	16	881
60 - < 70	18	1,176
70 - < 80	15	1,132
80 - < 100	19	1,722
>= 100	159	241,024
總數 Total	372	248,345

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	384	206
1 - < 2	401	596
2 - < 10	1,308	6,714
10 - < 20	428	5,976
20 - < 30	160	3,922
30 - < 50	162	6,387
50 - < 100	189	13,215
>=100	239	257,280
總數 Total	3,271	294,296

(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	180	69
1 - < 2	68	101
2 - < 10	183	803
10 - < 20	44	621
20 - < 30	20	497
30 - < 50	19	757
50 - < 100	21	1,549
>=100	24	9,483
總數 Total	559	13,880

(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	564	275
1 - < 2	469	697
2 - < 10	1,491	7,517
10 - < 20	472	6,597
20 - < 30	180	4,419
30 - < 50	181	7,144
50 - < 100	210	14,764
>=100	263	266,763
總數 Total	3,830	308,176

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