

職業退休計劃統計數字

ORSO SCHEMES STATISTICS

統計數字

Statistics

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

B. 截至2017年3月31日的職業退休計劃統計數字

Statistics on ORSO Schemes as at 31 March 2017

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2017年3月31日，總共有4,522個職業退休計劃，包括3,860個職業退休註冊計劃及662個職業退休豁免計劃。在這4,522個職業退休計劃中，有3,485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 2017, there were 4,522 ORSO schemes, comprising of 3,860 ORSO registered schemes and 662 ORSO exempted schemes. Out of these 4,522 ORSO schemes 3,485 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	3,197 (92%)	288 (8%)	3,485 (100%)
沒有強積金豁免 Non-MPF Exempted	871 (84%)	166 (16%)	1,037 (100%)
總數 Total	4,068 (90%)	454 (10%)	4,522 (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	23 (1%)	3,384 (97%)	78 (2%)	3,485 (100%)
沒有強積金豁免 Non-MPF Exempted	253 (24%)	709 (68%)	75 (7%)	1,037 (100%)*
總數 Total	276 (6%)	4,093 (91%)	153 (3%)	4,522 (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	3,258 (93%)	227 (7%)	3,485 (100%)
沒有強積金豁免 Non-MPF Exempted	647 (62%)	390 (38%)	1,037 (100%)
總數 Total	3,905 (86%)	617 (14%)	4,522 (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	2,984 (91%)	281 (9%)	3,265 (100%)
沒有強積金豁免 Non-MPF Exempted	470 (79%)	125 (21%)	595 (100%)
總數 Total	3,454 (89%)	406 (11%)	3,860 (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	326,363 (98%)	5,471 (2%)	331,834 (100%)
沒有強積金豁免 Non-MPF Exempted	41,459 (98%)	1,033 (2%)	42,492 (100%)
總數 Total	367,822 (98%)	6,504 (2%)	374,326 (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	20,764 (78%)	5,839 (22%)	26,603 (100%)
沒有強積金豁免 Non-MPF Exempted	661 (64%)	368 (36%)	1,029 (100%)
總數 Total	21,425 (78%)	6,207 (22%)	27,632 (100%)

B. 截至 2017 年 3 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2017

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	3,265	595	3,860
豁免計劃 Exempted Schemes	220	442	662
總數 Total	3,485	1,037	4,522

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	7	4	11
總數 Total	7	4	11

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	73,683	2,904	132,895	168	206,578	3,072
(ii) 界定利益計劃 Defined Benefit Schemes	5,528	80	119,728	113	125,256	193
(iii) 總數 Total	79,211	2,984	252,623	281	331,834	3,265

(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	7,808	191	1,142	2	8,950	193
(ii) 界定利益計劃 Defined Benefit Schemes	173	3	0	0	173	3
(iii) 分項總數 Subtotal	7,981	194	1,142	2	9,123	196
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	8,352	272	19,895	112	28,247	384
(ii) 界定利益計劃 Defined Benefit Schemes	108	4	5,014	11	5,122	15
(iii) 分項總數 Subtotal	8,460	276	24,909	123	33,369	399
(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)	16,160	463	21,037	114	37,197	577
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	281	7	5,014	11	5,295	18
(iii) 總數 Total	16,441	470	26,051	125	42,492	595

(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	7,808	191	1,142	2	8,950	193
(ii) 界定利益計劃 Defined Benefit Schemes	173	3	0	0	173	3
(iii) 分項總數 Subtotal	7,981	194	1,142	2	9,123	196
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	82,035	3,176	152,790	280	234,825	3,456
(ii) 界定利益計劃 Defined Benefit Schemes	5,636	84	124,742	124	130,378	208
(iii) 分項總數 Subtotal	87,671	3,260	277,532	404	365,203	3,664
(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)	89,843	3,367	153,932	282	243,775	3,649
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,809	87	124,742	124	130,551	211
(iii) 總數 Total	95,652	3,454	278,674	406	374,326	3,860

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	3,571	2,878	14,976	168	18,547	3,046
(ii) 界定利益計劃 Defined Benefit Schemes	314	78	7,742	113	8,056	191
(iii) 總數 Total	3,885	2,956	22,718	281	26,603	3,237

(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	41	189	19	2	60	191
(ii) 界定利益計劃 Defined Benefit Schemes	0	3	0	0	0	3
(iii) 分項總數 Subtotal	41	192	19	2	60	194
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	185	262	706	84	891	346
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	75	11	78	15
(iii) 分項總數 Subtotal	188	266	781	95	969	361
(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)	226	451	725	86	951	537
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	7	75	11	78	18
(iii) 總數 Total	229	458	800	97	1,029	555

(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	41	189	19	2	60	191
(ii) 界定利益計劃 Defined Benefit Schemes	0	3	0	0	0	3
(iii) 分項總數 Subtotal	41	192	19	2	60	194
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,756	3,140	15,682	252	19,438	3,392
(ii) 界定利益計劃 Defined Benefit Schemes	317	82	7,817	124	8,134	206
(iii) 分項總數 Subtotal	4,073	3,222	23,499	376	27,572	3,598
(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)	3,797	3,329	15,701	254	19,498	3,583
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	317	85	7,817	124	8,134	209
(iii) 總數 Total	4,114	3,414	23,518	378	27,632	3,792

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	50,040	2,878	133,771	168	183,811	3,046
(ii) 界定利益計劃 Defined Benefit Schemes	4,684	78	103,778	113	108,462	191
(iii) 總數 Total	54,724	2,956	237,549	281	292,273	3,237

(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	953	189	193	2	1,146	191
(ii) 界定利益計劃 Defined Benefit Schemes	108	3	0	0	108	3
(iii) 分項總數 Subtotal	1,061	192	193	2	1,254	194
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,393	262	6,352	84	9,745	346
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	2,539	11	2,567	15
(iii) 分項總數 Subtotal	3,421	266	8,891	95	12,312	361
(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)	4,346	451	6,545	86	10,891	537
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	136	7	2,539	11	2,675	18
(iii) 總數 Total	4,482	458	9,084	97	13,566	555

(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	953	189	193	2	1,146	191
(ii) 界定利益計劃 Defined Benefit Schemes	108	3	0	0	108	3
(iii) 分項總數 Subtotal	1,061	192	193	2	1,254	194
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	53,433	3,140	140,123	252	193,556	3,392
(ii) 界定利益計劃 Defined Benefit Schemes	4,712	82	106,317	124	111,029	206
(iii) 分項總數 Subtotal	58,145	3,222	246,440	376	304,585	3,598
(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)	54,386	3,329	140,316	254	194,702	3,583
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,820	85	106,317	124	111,137	209
(iii) 總數 Total	59,206	3,414	246,633	378	305,839	3,792

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	17	142
50 - < 100	6	26	398
100 - < 500	10	250	3,034
500 - < 1,000	4	65	2,960
1,000 - < 1,500	4	344	4,588
1,500 - < 2,000	2	50	1,805
>= 2,000	6	2,204	41,797
總數 Total	39	2,956	54,724

(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	70	162
50 - < 100	3	12	86
100 - < 500	7	97	476
500 - < 1,000	3	76	753
1,000 - < 1,500	4	32	210
1,500 - < 2,000	2	6	1,327
>= 2,000	6	165	1,468
總數 Total	42	458	4,482

(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	87	304
50 - < 100	7	38	484
100 - < 500	11	347	3,510
500 - < 1,000	5	141	3,713
1,000 - < 1,500	4	376	4,798
1,500 - < 2,000	2	56	3,132
>= 2,000	6	2,369	43,265
總數 Total	58	3,414	59,206

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	30
5 - < 10	16	123
10 - < 20	12	181
20 - < 30	13	325
30 - < 40	14	489
40 - < 50	13	597
50 - < 60	11	608
60 - < 70	14	908
70 - < 80	11	822
80 - < 100	16	1,444
>= 100	144	232,022
總數 Total	281	237,549

(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	37	54
5 - < 10	10	66
10 - < 20	8	113
20 - < 30	4	99
30 - < 40	4	135
40 - < 50	2	88
50 - < 60	4	218
60 - < 70	6	398
70 - < 80	2	148
80 - < 100	3	272
>= 100	17	7,493
總數 Total	97	9,084

(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	54	84
5 - < 10	26	189
10 - < 20	20	294
20 - < 30	17	424
30 - < 40	18	624
40 - < 50	15	685
50 - < 60	15	826
60 - < 70	20	1,306
70 - < 80	13	970
80 - < 100	19	1,716
> = 100	161	239,515
總數 Total	378	246,633

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	378	205
1 - < 2	393	585
2 - < 10	1,292	6,604
10 - < 20	428	5,979
20 - < 30	157	3,831
30 - < 50	165	6,512
50 - < 100	185	13,060
>=100	239	255,497
總數 Total	3,237	292,273

(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	183	67
1 - < 2	68	100
2 - < 10	184	811
10 - < 20	39	551
20 - < 30	19	463
30 - < 50	18	712
50 - < 100	20	1,458
>=100	24	9,404
總數 Total	555	13,566

(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	561	272
1 - < 2	461	685
2 - < 10	1,476	7,415
10 - < 20	467	6,530
20 - < 30	176	4,294
30 - < 50	183	7,224
50 - < 100	205	14,518
>=100	263	264,901
總數 Total	3,792	305,839

註：統計數字乃根據截至2017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 2017 in respect of registered schemes.