

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6月30日的職業退休計劃統計數字

Statistics on ORSO Schemes as at 30 June 2017

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2017年6月30日，總共有4,469個職業退休計劃，包括3,831個職業退休註冊計劃及638個職業退休豁免計劃。在這4,469個職業退休計劃中，有3,461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 June 2017, there were 4,469 ORSO schemes, comprising of 3,831 ORSO registered schemes and 638 ORSO exempted schemes. Out of these 4,469 ORSO schemes 3,461 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	3,177 (92%)	284 (8%)	3,461 (100%)
沒有強積金豁免 Non-MPF Exempted	846 (84%)	162 (16%)	1,008 (100%)
總數 Total	4,023 (90%)	446 (10%)	4,469 (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	22 (1%)	3,362 (97%)	77 (2%)	3,461 (100%)
沒有強積金豁免 Non-MPF Exempted	248 (25%)	686 (68%)	74 (7%)	1,008 (100%)
總數 Total	270 (6%)	4,048 (91%)	151 (3%)	4,469 (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	3,238 (94%)	223 (6%)	3,461 (100%)
沒有強積金豁免 Non-MPF Exempted	638 (63%)	370 (37%)	1,008 (100%)
總數 Total	3,876 (87%)	593 (13%)	4,469 (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	2,967 (91%)	277 (9%)	3,244 (100%)
沒有強積金豁免 Non-MPF Exempted	466 (79%)	121 (21%)	587 (100%)
總數 Total	3,433 (90%)	398 (10%)	3,831 (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	326,283 (98%)	5,449 (2%)	331,732 (100%)
沒有強積金豁免 Non-MPF Exempted	40,659 (98%)	853 (2%)	41,512 (100%)
總數 Total	366,942 (98%)	6,302 (2%)	373,244 (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	21,112 (78%)	5,859 (22%)	26,971 (100%)
沒有強積金豁免 Non-MPF Exempted	674 (64%)	373 (36%)	1,047 (100%)
總數 Total	21,786 (78%)	6,232 (22%)	28,018 (100%)

B. 截至 2017 年 6 月 30 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 June 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	3,244	587	3,831
豁免計劃 Exempted Schemes	217	421	638
總數 Total	3,461	1,008	4,469

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	1	0	1
總數 Total	1	0	1

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	73,553	2,887	133,259	167	206,812	3,054
(ii) 界定利益計劃 Defined Benefit Schemes	5,528	80	119,392	110	124,920	190
(iii) 總數 Total	79,081	2,967	252,651	277	331,732	3,244

(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	7,800	189	1,142	2	8,942	191
(ii) 界定利益計劃 Defined Benefit Schemes	173	3	0	0	173	3
(iii) 分項總數 Subtotal	7,973	192	1,142	2	9,115	194
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	8,291	270	18,997	108	27,288	378
(ii) 界定利益計劃 Defined Benefit Schemes	108	4	5,001	11	5,109	15
(iii) 分項總數 Subtotal	8,399	274	23,998	119	32,397	393
(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)	16,091	459	20,139	110	36,230	569
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	281	7	5,001	11	5,282	18
(iii) 總數 Total	16,372	466	25,140	121	41,512	587

(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	7,800	189	1,142	2	8,942	191
(ii) 界定利益計劃 Defined Benefit Schemes	173	3	0	0	173	3
(iii) 分項總數 Subtotal	7,973	192	1,142	2	9,115	194
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	81,844	3,157	152,256	275	234,100	3,432
(ii) 界定利益計劃 Defined Benefit Schemes	5,636	84	124,393	121	130,029	205
(iii) 分項總數 Subtotal	87,480	3,241	276,649	396	364,129	3,637
(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)	89,644	3,346	153,398	277	243,042	3,623
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,809	87	124,393	121	130,202	208
(iii) 總數 Total	95,453	3,433	277,791	398	373,244	3,831

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	3,589	2,865	15,027	167	18,616	3,032
(ii) 界定利益計劃 Defined Benefit Schemes	314	78	8,041	110	8,355	188
(iii) 總數 Total	3,903	2,943	23,068	277	26,971	3,220

(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	187	19	2	60	189
(ii) 界定利益計劃 Defined Benefit Schemes	0	3	0	0	0	3
(iii) 分項總數 Subtotal	41	190	19	2	60	192
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	184	259	720	84	904	343
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	80	11	83	15
(iii) 分項總數 Subtotal	187	263	800	95	987	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)	225	446	739	86	964	532
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	7	80	11	83	18
(iii) 總數 Total	228	453	819	97	1,047	550

(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	187	19	2	60	189
(ii) 界定利益計劃 Defined Benefit Schemes	0	3	0	0	0	3
(iii) 分項總數 Subtotal	41	190	19	2	60	192
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,773	3,124	15,747	251	19,520	3,375
(ii) 界定利益計劃 Defined Benefit Schemes	317	82	8,121	121	8,438	203
(iii) 分項總數 Subtotal	4,090	3,206	23,868	372	27,958	3,578
(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)	3,814	3,311	15,766	253	19,580	3,564
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	317	85	8,121	121	8,438	206
(iii) 總數 Total	4,131	3,396	23,887	374	28,018	3,770

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	50,179	2,865	133,975	167	184,154	3,032
(ii) 界定利益計劃 Defined Benefit Schemes	4,685	78	103,595	110	108,280	188
(iii) 總數 Total	54,864	2,943	237,570	277	292,434	3,220

(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	951	187	193	2	1,144	189
(ii) 界定利益計劃 Defined Benefit Schemes	108	3	0	0	108	3
(iii) 分項總數 Subtotal	1,059	190	193	2	1,252	192
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,379	259	6,426	84	9,805	343
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	2,511	11	2,539	15
(iii) 分項總數 Subtotal	3,407	263	8,937	95	12,344	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)	4,330	446	6,619	86	10,949	532
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	136	7	2,511	11	2,647	18
(iii) 總數 Total	4,466	453	9,130	97	13,596	550

(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	951	187	193	2	1,144	189
(ii) 界定利益計劃 Defined Benefit Schemes	108	3	0	0	108	3
(iii) 分項總數 Subtotal	1,059	190	193	2	1,252	192
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	53,558	3,124	140,401	251	193,959	3,375
(ii) 界定利益計劃 Defined Benefit Schemes	4,713	82	106,106	121	110,819	203
(iii) 分項總數 Subtotal	58,271	3,206	246,507	372	304,778	3,578
(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)	54,509	3,311	140,594	253	195,103	3,564
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,821	85	106,106	121	110,927	206
(iii) 總數 Total	59,330	3,396	246,700	374	306,030	3,770

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	249	3,034
500 - < 1,000	4	65	2,960
1,000 - < 1,500	4	347	4,747
1,500 - < 2,000	2	50	1,805
>= 2,000	6	2,189	41,778
總數 Total	39	2,943	54,864

(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	69	160
50 - < 100	3	12	86
100 - < 500	7	95	466
500 - < 1,000	3	76	753
1,000 - < 1,500	4	31	207
1,500 - < 2,000	2	6	1,327
>= 2,000	6	164	1,467
總數 Total	42	453	4,466

(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	23	86	302
50 - < 100	7	38	484
100 - < 500	11	344	3,500
500 - < 1,000	5	141	3,713
1,000 - < 1,500	4	378	4,954
1,500 - < 2,000	2	56	3,132
>= 2,000	6	2,353	43,245
總數 Total	58	3,396	59,330

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	18	29
5 - < 10	15	114
10 - < 20	10	150
20 - < 30	12	295
30 - < 40	15	522
40 - < 50	13	590
50 - < 60	9	498
60 - < 70	14	896
70 - < 80	13	972
80 - < 100	15	1,351
>= 100	143	232,153
總數 Total	277	237,570

(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	38	52
5 - < 10	10	66
10 - < 20	9	133
20 - < 30	3	79
30 - < 40	4	135
40 - < 50	3	126
50 - < 60	3	162
60 - < 70	6	393
70 - < 80	1	74
80 - < 100	3	282
>= 100	17	7,628
總數 Total	97	9,130

(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	56	81
5 - < 10	25	180
10 - < 20	19	283
20 - < 30	15	374
30 - < 40	19	657
40 - < 50	16	716
50 - < 60	12	660
60 - < 70	20	1,289
70 - < 80	14	1,046
80 - < 100	18	1,633
>= 100	160	239,781
總數 Total	374	246,700

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	373	202
1 - < 2	388	576
2 - < 10	1,287	6,581
10 - < 20	425	5,931
20 - < 30	158	3,844
30 - < 50	165	6,513
50 - < 100	185	13,053
>=100	239	255,734
總數 Total	3,220	292,434

(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	68
1 - < 2	69	101
2 - < 10	178	780
10 - < 20	40	562
20 - < 30	19	464
30 - < 50	19	749
50 - < 100	18	1,335
>=100	24	9,537
總數 Total	550	13,596

(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	556	270
1 - < 2	457	677
2 - < 10	1,465	7,361
10 - < 20	465	6,493
20 - < 30	177	4,308
30 - < 50	184	7,262
50 - < 100	203	14,388
>=100	263	265,271
總數 Total	3,770	306,030

註：統計數字乃根據截至 2017 年 6 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 June 2017 in respect of registered schemes.