

職業退休計劃統計數字

ORSO SCHEMES STATISTICS

統計數字

Statistics

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Statistics on ORSO Schemes as at 31 March 2018

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2018年3月31日，總共有4,322個職業退休計劃，包括3,712個職業退休註冊計劃及610個職業退休豁免計劃。在這4,322個職業退休計劃中，有3,358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 2018, there were 4,322 ORSO schemes, comprising of 3,712 ORSO registered schemes and 610 ORSO exempted schemes. Out of these 4,322 ORSO schemes 3,358 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	3,081 (92%)	277 (8%)	3,358 (100%)
沒有強積金豁免 Non-MPF Exempted	811 (84%)	153 (16%)	964 (100%)
總數 Total	3,892 (90%)	430 (10%)	4,322 (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	20 (1%)	3,263 (97%)	75 (2%)	3,358 (100%)
沒有強積金豁免 Non-MPF Exempted	234 (24%)	661 (69%)	69 (7%)	964 (100%)
總數 Total	254 (6%)	3,924 (91%)	144 (3%)	4,322 (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	3,143 (94%)	215 (6%)	3,358 (100%)
沒有強積金豁免 Non-MPF Exempted	611 (63%)	353 (37%)	964 (100%)
總數 Total	3,754 (87%)	568 (13%)	4,322 (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	2,877 (91%)	272 (9%)	3,149 (100%)
沒有強積金豁免 Non-MPF Exempted	448 (80%)	115 (20%)	563 (100%)
總數 Total	3,325 (90%)	387 (10%)	3,712 (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	323,877 (99%)	4,034 (1%)	327,911 (100%)
沒有強積金豁免 Non-MPF Exempted	41,351 (98%)	899 (2%)	42,250 (100%)
總數 Total	365,228 (99%)	4,933 (1%)	370,161 (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	16,809 (79%)	4,429 (21%)	21,238 (100%)
沒有強積金豁免 Non-MPF Exempted	1,100 (64%)	615 (36%)	1,715 (100%)
總數 Total	17,909 (78%)	5,044 (22%)	22,953 (100%)

B. 截至 2018 年 3 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2018

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	3,149	563	3,712
豁免計劃 Exempted Schemes	209	401	610
總數 Total	3,358	964	4,322

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	8	2	10
總數 Total	8	2	10

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	69,862	2,799	137,669	164	207,531	2,963
(ii) 界定利益計劃 Defined Benefit Schemes	5,370	78	115,010	108	120,380	186
(iii) 總數 Total	75,232	2,877	252,679	272	327,911	3,149

(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	7,669	177	1,239	2	8,908	179
(ii) 界定利益計劃 Defined Benefit Schemes	164	2	0	0	164	2
(iii) 分項總數 Subtotal	7,833	179	1,239	2	9,072	181
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	8,049	265	19,788	103	27,837	368
(ii) 界定利益計劃 Defined Benefit Schemes	100	4	5,241	10	5,341	14
(iii) 分項總數 Subtotal	8,149	269	25,029	113	33,178	382
(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)	15,718	442	21,027	105	36,745	547
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	264	6	5,241	10	5,505	16
(iii) 總數 Total	15,982	448	26,268	115	42,250	563

(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	7,669	177	1,239	2	8,908	179
(ii) 界定利益計劃 Defined Benefit Schemes	164	2	0	0	164	2
(iii) 分項總數 Subtotal	7,833	179	1,239	2	9,072	181
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	77,911	3,064	157,457	267	235,368	3,331
(ii) 界定利益計劃 Defined Benefit Schemes	5,470	82	120,251	118	125,721	200
(iii) 分項總數 Subtotal	83,381	3,146	277,708	385	361,089	3,531
(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)	85,580	3,241	158,696	269	244,276	3,510
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,634	84	120,251	118	125,885	202
(iii) 總數 Total	91,214	3,325	278,947	387	370,161	3,712

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	3,436	2,780	9,940	164	13,376	2,944
(ii) 界定利益計劃 Defined Benefit Schemes	316	76	7,546	108	7,862	184
(iii) 總數 Total	3,752	2,856	17,486	272	21,238	3,128

(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	37	175	21	2	58	177
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	37	177	21	2	58	179
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	161	258	1,414	96	1,575	354
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	79	10	82	14
(iii) 分項總數 Subtotal	164	262	1,493	106	1,657	368
(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)	198	433	1,435	98	1,633	531
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	6	79	10	82	16
(iii) 總數 Total	201	439	1,514	108	1,715	547

(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	37	175	21	2	58	177
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	37	177	21	2	58	179
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,597	3,038	11,354	260	14,951	3,298
(ii) 界定利益計劃 Defined Benefit Schemes	319	80	7,625	118	7,944	198
(iii) 分項總數 Subtotal	3,916	3,118	18,979	378	22,895	3,496
(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)	3,634	3,213	11,375	262	15,009	3,475
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	319	82	7,625	118	7,944	200
(iii) 總數 Total	3,953	3,295	19,000	380	22,953	3,675

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	50,953	2,780	141,273	164	192,226	2,944
(ii) 界定利益計劃 Defined Benefit Schemes	4,904	76	105,777	108	110,681	184
(iii) 總數 Total	55,857	2,856	247,050	272	302,907	3,128

(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	919	175	203	2	1,122	177
(ii) 界定利益計劃 Defined Benefit Schemes	106	2	0	0	106	2
(iii) 分項總數 Subtotal	1,025	177	203	2	1,228	179
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,123	258	7,676	96	9,799	354
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	2,822	10	2,850	14
(iii) 分項總數 Subtotal	2,151	262	10,498	106	12,649	368
(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)	3,042	433	7,879	98	10,921	531
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	134	6	2,822	10	2,956	16
(iii) 總數 Total	3,176	439	10,701	108	13,877	547

(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	919	175	203	2	1,122	177
(ii) 界定利益計劃 Defined Benefit Schemes	106	2	0	0	106	2
(iii) 分項總數 Subtotal	1,025	177	203	2	1,228	179
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	53,076	3,038	148,949	260	202,025	3,298
(ii) 界定利益計劃 Defined Benefit Schemes	4,932	80	108,599	118	113,531	198
(iii) 分項總數 Subtotal	58,008	3,118	257,548	378	315,556	3,496
(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)	53,995	3,213	149,152	262	203,147	3,475
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,038	82	108,599	118	113,637	200
(iii) 總數 Total	59,033	3,295	257,751	380	316,784	3,675

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	6	13	85
50 - < 100	7	29	455
100 - < 500	10	231	2,975
500 - < 1,000	5	92	3,543
1,000 - < 1,500	4	334	4,731
1,500 - < 2,000	1	29	1,798
>= 2,000	6	2,128	42,270
總數 Total	39	2,856	55,857

(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	64	127
50 - < 100	3	5	17
100 - < 500	9	99	586
500 - < 1,000	4	77	775
1,000 - < 1,500	4	32	203
1,500 - < 2,000	1	4	31
>= 2,000	6	158	1,437
總數 Total	44	439	3,176

(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	22	77	212
50 - < 100	7	34	472
100 - < 500	12	330	3,561
500 - < 1,000	6	169	4,318
1,000 - < 1,500	4	366	4,934
1,500 - < 2,000	1	33	1,829
>= 2,000	6	2,286	43,707
總數 Total	58	3,295	59,033

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	29
5 - < 10	12	89
10 - < 20	12	175
20 - < 30	13	337
30 - < 40	14	485
40 - < 50	13	576
50 - < 60	8	441
60 - < 70	14	893
70 - < 80	14	1,055
80 - < 100	14	1,254
>= 100	141	241,716
總數 Total	272	247,050

(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	49
5 - < 10	12	77
10 - < 20	14	186
20 - < 30	6	141
30 - < 40	2	64
40 - < 50	3	126
50 - < 60	3	173
60 - < 70	4	251
70 - < 80	3	235
80 - < 100	1	97
>= 100	22	9,302
總數 Total	108	10,701

(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	55	78
5 - < 10	24	166
10 - < 20	26	361
20 - < 30	19	478
30 - < 40	16	549
40 - < 50	16	702
50 - < 60	11	614
60 - < 70	18	1,144
70 - < 80	17	1,290
80 - < 100	15	1,351
>= 100	163	251,018
總數 Total	380	257,751

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	361	187
1 - <2	348	510
2 - <10	1,254	6,400
10 - <20	425	5,968
20 - <30	153	3,727
30 - <50	165	6,446
50 - <100	179	12,608
>=100	243	267,061
總數 Total	3,128	302,907

(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	178	62
1 - <2	69	100
2 - <10	177	782
10 - <20	45	633
20 - <30	17	400
30 - <50	17	648
50 - <100	17	1,233
>=100	27	10,019
總數 Total	547	13,877

(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	539	249
1 - <2	417	610
2 - <10	1,431	7,182
10 - <20	470	6,601
20 - <30	170	4,127
30 - <50	182	7,094
50 - <100	196	13,841
>=100	270	277,080
總數 Total	3,675	316,784

註：統計數字乃根據截至2018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 2018 in respect of registered schemes.