

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2018年9月30日，總共有4,237個職業退休計劃，包括3,644個職業退休註冊計劃及593個職業退休豁免計劃。在這4,237個職業退休計劃中，有3,289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 September 2018, there were 4,237 ORSO schemes, comprising of 3,644 ORSO registered schemes and 593 ORSO exempted schemes. Out of these 4,237 ORSO schemes 3,289 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	3,015 (92%)	274 (8%)	3,289 (100%)
沒有強積金豁免 Non-MPF Exempted	797 (84%)	151 (16%)	948 (100%)
總數 Total	3,812 (90%)	425 (10%)	4,237 (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%)	3,194 (97%)	75 (2%)	3,289 (100%)
沒有強積金豁免 Non-MPF Exempted	226 (24%)	656 (69%)	66 (7%)	948 (100%)
總數 Total	246 (6%)	3,850 (91%)	141 (3%)	4,237 (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	3,077 (94%)	212 (6%)	3,289 (100%)
沒有強積金豁免 Non-MPF Exempted	608 (64%)	340 (36%)	948 (100%)
總數 Total	3,685 (87%)	552 (13%)	4,237 (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	2,814 (91%)	267 (9%)	3,081 (100%)
沒有強積金豁免 Non-MPF Exempted	448 (80%)	115 (20%)	563 (100%)
總數 Total	3,262 (90%)	382 (10%)	3,644 (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	314,611 (99%)	3,684 (1%)	318,295 (100%)
沒有強積金豁免 Non-MPF Exempted	43,456 (98%)	947 (2%)	44,403 (100%)
總數 Total	358,067 (99%)	4,631 (1%)	362,698 (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	17,230 (79%)	4,588 (21%)	21,818 (100%)
沒有強積金豁免 Non-MPF Exempted	1,061 (60%)	704 (40%)	1,765 (100%)
總數 Total	18,291 (78%)	5,292 (22%)	23,583 (100%)

B. 截至 2018 年 9 月 30 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 September 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	3,081	563	3,644
豁免計劃 Exempted Schemes	208	385	593
總數 Total	3,289	948	4,237

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	14	5	19
總數 Total	14	5	19

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	66,195	2,737	134,665	161	200,860	2,898
(ii) 界定利益計劃 Defined Benefit Schemes	5,057	77	112,378	106	117,435	183
(iii) 總數 Total	71,252	2,814	247,043	267	318,295	3,081

(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	7,847	173	1,298	2	9,145	175
(ii) 界定利益計劃 Defined Benefit Schemes	143	2	0	0	143	2
(iii) 分項總數 Subtotal	7,990	175	1,298	2	9,288	177
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	8,081	269	21,682	103	29,763	372
(ii) 界定利益計劃 Defined Benefit Schemes	92	4	5,260	10	5,352	14
(iii) 分項總數 Subtotal	8,173	273	26,942	113	35,115	386
(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)	15,928	442	22,980	105	38,908	547
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	235	6	5,260	10	5,495	16
(iii) 總數 Total	16,163	448	28,240	115	44,403	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	7,847	173	1,298	2	9,145	175
(ii) 界定利益計劃 Defined Benefit Schemes	143	2	0	0	143	2
(iii) 分項總數 Subtotal	7,990	175	1,298	2	9,288	177
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	74,276	3,006	156,347	264	230,623	3,270
(ii) 界定利益計劃 Defined Benefit Schemes	5,149	81	117,638	116	122,787	197
(iii) 分項總數 Subtotal	79,425	3,087	273,985	380	353,410	3,467
(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)	82,123	3,179	157,645	266	239,768	3,445
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,292	83	117,638	116	122,930	199
(iii) 總數 Total	87,415	3,262	275,283	382	362,698	3,644

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	3,316	2,711	9,984	160	13,300	2,871
(ii) 界定利益計劃 Defined Benefit Schemes	334	77	8,184	106	8,518	183
(iii) 總數 Total	3,650	2,788	18,168	266	21,818	3,054

(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	38	172	25	2	63	174
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	38	174	25	2	63	176
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	174	261	1,449	92	1,623	353
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	76	10	79	14
(iii) 分項總數 Subtotal	177	265	1,525	102	1,702	367
(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)	212	433	1,474	94	1,686	527
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	6	76	10	79	16
(iii) 總數 Total	215	439	1,550	104	1,765	543

(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	38	172	25	2	63	174
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	38	174	25	2	63	176
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,490	2,972	11,433	252	14,923	3,224
(ii) 界定利益計劃 Defined Benefit Schemes	337	81	8,260	116	8,597	197
(iii) 分項總數 Subtotal	3,826	3,053	19,693	368	23,519	3,421
(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)	3,528	3,144	11,458	254	14,986	3,398
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	337	83	8,260	116	8,597	199
(iii) 總數 Total	3,865	3,227	19,718	370	23,583	3,597

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	52,324	2,711	157,691	160	210,015	2,871
(ii) 界定利益計劃 Defined Benefit Schemes	5,149	77	119,355	106	124,504	183
(iii) 總數 Total	57,473	2,788	277,046	266	334,519	3,054

(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	947	172	299	2	1,246	174
(ii) 界定利益計劃 Defined Benefit Schemes	116	2	0	0	116	2
(iii) 分項總數 Subtotal	1,063	174	299	2	1,362	176
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,308	261	9,096	92	11,404	353
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	3,033	10	3,061	14
(iii) 分項總數 Subtotal	2,336	265	12,129	102	14,465	367
(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)	3,255	433	9,395	94	12,650	527
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	144	6	3,033	10	3,177	16
(iii) 總數 Total	3,399	439	12,428	104	15,827	543

(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	947	172	299	2	1,246	174
(ii) 界定利益計劃 Defined Benefit Schemes	116	2	0	0	116	2
(iii) 分項總數 Subtotal	1,063	174	299	2	1,362	176
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	54,632	2,972	166,787	252	221,419	3,224
(ii) 界定利益計劃 Defined Benefit Schemes	5,177	81	122,388	116	127,565	197
(iii) 分項總數 Subtotal	59,809	3,053	289,175	368	348,984	3,421
(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)	55,579	3,144	167,086	254	222,665	3,398
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,293	83	122,388	116	127,681	199
(iii) 總數 Total	60,872	3,227	289,474	370	350,346	3,597

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	12	66
50 - < 100	7	29	476
100 - < 500	10	227	3,008
500 - < 1,000	4	83	2,670
1,000 - < 1,500	5	334	5,840
1,500 - < 2,000	1	28	1,932
>= 2,000	6	2,075	43,481
總數 Total	39	2,788	57,473

(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	62	118
50 - < 100	3	5	17
100 - < 500	8	97	621
500 - < 1,000	4	77	799
1,000 - < 1,500	4	32	204
1,500 - < 2,000	1	4	31
>= 2,000	6	162	1,609
總數 Total	43	439	3,399

(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	74	184
50 - < 100	7	34	493
100 - < 500	12	324	3,629
500 - < 1,000	5	160	3,469
1,000 - < 1,500	5	366	6,044
1,500 - < 2,000	1	32	1,963
>= 2,000	6	2,237	45,090
總數 Total	58	3,227	60,872

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	23
5 - < 10	11	74
10 - < 20	13	188
20 - < 30	14	364
30 - < 40	12	434
40 - < 50	8	359
50 - < 60	13	710
60 - < 70	9	593
70 - < 80	14	1,044
80 - < 100	8	724
>= 100	147	272,533
總數 Total	266	277,046

(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	35
5 - < 10	13	84
10 - < 20	16	218
20 - < 30	7	186
30 - < 40	1	39
40 - < 50	2	96
50 - < 60	2	118
60 - < 70	5	318
70 - < 80	3	227
80 - < 100	1	87
>= 100	25	11,020
總數 Total	104	12,428

(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	58
5 - < 10	24	158
10 - < 20	29	406
20 - < 30	21	550
30 - < 40	13	473
40 - < 50	10	455
50 - < 60	15	828
60 - < 70	14	911
70 - < 80	17	1,271
80 - < 100	9	811
>= 100	172	283,553
總數 Total	370	289,474

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	336	165
1 - < 2	345	510
2 - < 10	1,174	5,956
10 - < 20	456	6,421
20 - < 30	151	3,653
30 - < 50	161	6,232
50 - < 100	180	12,626
>=100	251	298,956
總數 Total	3,054	334,519

(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	174	59
1 - < 2	70	99
2 - < 10	171	776
10 - < 20	46	657
20 - < 30	20	493
30 - < 50	13	527
50 - < 100	18	1,293
>=100	31	11,923
總數 Total	543	15,827

(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	510	224
1 - < 2	415	609
2 - < 10	1,345	6,732
10 - < 20	502	7,078
20 - < 30	171	4,146
30 - < 50	174	6,759
50 - < 100	198	13,919
>=100	282	310,879
總數 Total	3,597	350,346

註：統計數字乃根據截至2018年9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 September 2018 in respect of registered schemes.