

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 December 2018

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2018年12月31日，總共有4,197個職業退休計劃，包括3,607個職業退休註冊計劃及590個職業退休豁免計劃。在這4,197個職業退休計劃中，有3,255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 2018, there were 4,197 ORSO schemes, comprising of 3,607 ORSO registered schemes and 590 ORSO exempted schemes. Out of these 4,197 ORSO schemes 3,255 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	2,987 (92%)	268 (8%)	3,255 (100%)
沒有強積金豁免 Non-MPF Exempted	791 (84%)	151 (16%)	942 (100%)
總數 Total	3,778 (90%)	419 (10%)	4,197 (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%)	3,160 (97%)	75 (2%)	3,255 (100%)
沒有強積金豁免 Non-MPF Exempted	224 (24%)	653 (69%)	65 (7%)	942 (100%)
總數 Total	244 (6%)	3,813 (91%)	140 (3%)	4,197 (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	3,044 (94%)	211 (6%)	3,255 (100%)
沒有強積金豁免 Non-MPF Exempted	605 (64%)	337 (36%)	942 (100%)
總數 Total	3,649 (87%)	548 (13%)	4,197 (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	2,783 (91%)	265 (9%)	3,048 (100%)
沒有強積金豁免 Non-MPF Exempted	440 (79%)	119 (21%)	559 (100%)
總數 Total	3,223 (89%)	384 (11%)	3,607 (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	313,458 (99%)	3,850 (1%)	317,308 (100%)
沒有強積金豁免 Non-MPF Exempted	43,530 (98%)	949 (2%)	44,479 (100%)
總數 Total	356,988 (99%)	4,799 (1%)	361,787 (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	17,102 (79%)	4,587 (21%)	21,689 (100%)
沒有強積金豁免 Non-MPF Exempted	805 (55%)	661 (45%)	1,466 (100%)
總數 Total	17,907 (77%)	5,248 (23%)	23,155 (100%)

B. 截至 2018 年 12 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 December 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	3,048	559	3,607
豁免計劃 Exempted Schemes	207	383	590
總數 Total	3,255	942	4,197

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	24	5	29
總數 Total	24	5	29

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	66,045	2,709	134,371	161	200,416	2,870
(ii) 界定利益計劃 Defined Benefit Schemes	4,990	74	111,902	104	116,892	178
(iii) 總數 Total	71,035	2,783	246,273	265	317,308	3,048

(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	7,845	171	1,298	2	9,143	173
(ii) 界定利益計劃 Defined Benefit Schemes	143	2	0	0	143	2
(iii) 分項總數 Subtotal	7,988	173	1,298	2	9,286	175
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	7,852	263	21,996	107	29,848	370
(ii) 界定利益計劃 Defined Benefit Schemes	92	4	5,253	10	5,345	14
(iii) 分項總數 Subtotal	7,944	267	27,249	117	35,193	384
(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)	15,697	434	23,294	109	38,991	543
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	235	6	5,253	10	5,488	16
(iii) 總數 Total	15,932	440	28,547	119	44,479	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	
	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	7,845	171	1,298	2	9,143	173
(ii) 界定利益計劃 Defined Benefit Schemes	143	2	0	0	143	2
(iii) 分項總數 Subtotal	7,988	173	1,298	2	9,286	175
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	73,897	2,972	156,367	268	230,264	3,240
(ii) 界定利益計劃 Defined Benefit Schemes	5,082	78	117,155	114	122,237	192
(iii) 分項總數 Subtotal	78,979	3,050	273,522	382	352,501	3,432
(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)	81,742	3,143	157,665	270	239,407	3,413
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,225	80	117,155	114	122,380	194
(iii) 總數 Total	86,967	3,223	274,820	384	361,787	3,607

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	3,296	2,661	9,974	160	13,270	2,821
(ii) 界定利益計劃 Defined Benefit Schemes	330	74	8,089	104	8,419	178
(iii) 總數 Total	3,626	2,735	18,063	264	21,689	2,999

(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	170	25	2	63	172
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	38	172	25	2	63	174
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	155	257	1,159	92	1,314	349
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	86	10	89	14
(iii) 分項總數 Subtotal	158	261	1,245	102	1,403	363
(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)	193	427	1,184	94	1,377	521
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	6	86	10	89	16
(iii) 總數 Total	196	433	1,270	104	1,466	537

(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	170	25	2	63	172
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	38	172	25	2	63	174
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,451	2,918	11,133	252	14,584	3,170
(ii) 界定利益計劃 Defined Benefit Schemes	333	78	8,175	114	8,508	192
(iii) 分項總數 Subtotal	3,784	2,996	19,308	366	23,092	3,362
(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)	3,489	3,088	11,158	254	14,647	3,342
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	333	80	8,175	114	8,508	194
(iii) 總數 Total	3,822	3,168	19,333	368	23,155	3,536

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	52,213	2,661	158,208	160	210,421	2,821
(ii) 界定利益計劃 Defined Benefit Schemes	5,136	74	119,992	104	125,128	178
(iii) 總數 Total	57,349	2,735	278,200	264	335,549	2,999

(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	170	299	2	1,246	172
(ii) 界定利益計劃 Defined Benefit Schemes	116	2	0	0	116	2
(iii) 分項總數 Subtotal	1,063	172	299	2	1,362	174
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,339	257	9,459	92	11,798	349
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	3,195	10	3,223	14
(iii) 分項總數 Subtotal	2,367	261	12,654	102	15,021	363
(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)	3,286	427	9,758	94	13,044	521
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	144	6	3,195	10	3,339	16
(iii) 總數 Total	3,430	433	12,953	104	16,383	537

(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	170	299	2	1,246	172
(ii) 界定利益計劃 Defined Benefit Schemes	116	2	0	0	116	2
(iii) 分項總數 Subtotal	1,063	172	299	2	1,362	174
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	54,552	2,918	167,667	252	222,219	3,170
(ii) 界定利益計劃 Defined Benefit Schemes	5,164	78	123,187	114	128,351	192
(iii) 分項總數 Subtotal	59,716	2,996	290,854	366	350,570	3,362
(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)	55,499	3,088	167,966	254	223,465	3,342
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,280	80	123,187	114	128,467	194
(iii) 總數 Total	60,779	3,168	291,153	368	351,932	3,536

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	226	3,009
500 - < 1,000	4	82	2,600
1,000 - < 1,500	5	327	5,805
1,500 - < 2,000	0	0	0
>= 2,000	7	2,059	45,393
總數 Total	39	2,735	57,349

(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	16	59	118
50 - < 100	3	5	17
100 - < 500	8	100	653
500 - < 1,000	4	76	796
1,000 - < 1,500	4	32	223
1,500 - < 2,000	0	0	0
>= 2,000	7	161	1,623
總數 Total	42	433	3,430

(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	21	71	184
50 - < 100	7	34	493
100 - < 500	12	326	3,662
500 - < 1,000	5	158	3,396
1,000 - < 1,500	5	359	6,028
1,500 - < 2,000	0	0	0
>= 2,000	7	2,220	47,016
總數 Total	57	3,168	60,779

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	16	23
5 - < 10	11	75
10 - < 20	13	189
20 - < 30	13	344
30 - < 40	13	458
40 - < 50	6	275
50 - < 60	15	819
60 - < 70	8	531
70 - < 80	13	967
80 - < 100	8	722
>= 100	148	273,797
總數 Total	264	278,200

(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	34
5 - < 10	12	75
10 - < 20	16	215
20 - < 30	6	161
30 - < 40	2	69
40 - < 50	3	140
50 - < 60	1	60
60 - < 70	4	263
70 - < 80	5	379
80 - < 100	1	87
>= 100	25	11,470
總數 Total	104	12,953

(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	45	57
5 - < 10	23	150
10 - < 20	29	404
20 - < 30	19	505
30 - < 40	15	527
40 - < 50	9	415
50 - < 60	16	879
60 - < 70	12	794
70 - < 80	18	1,346
80 - < 100	9	809
>= 100	173	285,267
總數 Total	368	291,153

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	322	159
1 - <2	338	500
2 - <10	1,152	5,831
10 - <20	448	6,336
20 - <30	152	3,695
30 - <50	155	5,954
50 - <100	180	12,603
>=100	252	300,471
總數 Total	2,999	335,549

(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)
<1	170	57
1 - <2	68	97
2 - <10	167	749
10 - <20	49	690
20 - <30	19	469
30 - <50	15	601
50 - <100	17	1,235
>=100	32	12,485
總數 Total	537	16,383

(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	492	216
1 - <2	406	597
2 - <10	1,319	6,580
10 - <20	497	7,026
20 - <30	171	4,164
30 - <50	170	6,555
50 - <100	197	13,838
>=100	284	312,956
總數 Total	3,536	351,932

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