

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2019年6月30日，總共有4,115個職業退休計劃，包括3,539個職業退休註冊計劃及576個職業退休豁免計劃。在這4,115個職業退休計劃中，有3,189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 2019, there were 4,115 ORSO schemes, comprising of 3,539 ORSO registered schemes and 576 ORSO exempted schemes. Out of these 4,115 ORSO schemes 3,189 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	2,924 (92%)	265 (8%)	3,189 (100%)
沒有強積金豁免 Non-MPF Exempted	778 (84%)	148 (16%)	926 (100%)
總數 Total	3,702 (90%)	413 (10%)	4,115 (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	19 (1%)	3,096 (97%)	74 (2%)	3,189 (100%)
沒有強積金豁免 Non-MPF Exempted	221 (24%)	642 (69%)	63 (7%)	926 (100%)
總數 Total	240 (6%)	3,738 (91%)	137 (3%)	4,115 (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	2,982 (94%)	207 (6%)	3,189 (100%)
沒有強積金豁免 Non-MPF Exempted	600 (65%)	326 (35%)	926 (100%)
總數 Total	3,582 (87%)	533 (13%)	4,115 (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	2,725 (91%)	261 (9%)	2,986 (100%)
沒有強積金豁免 Non-MPF Exempted	431 (78%)	122 (22%)	553 (100%)
總數 Total	3,156 (89%)	383 (11%)	3,539 (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	311,246 (99%)	3,876 (1%)	315,122 (100%)
沒有強積金豁免 Non-MPF Exempted	44,409 (98%)	925 (2%)	45,334 (100%)
總數 Total	355,655 (99%)	4,801 (1%)	360,456 (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	16,532 (78%)	4,553 (22%)	21,085 (100%)
沒有強積金豁免 Non-MPF Exempted	795 (60%)	529 (40%)	1,324 (100%)
總數 Total	17,327 (77%)	5,082 (23%)	22,409 (100%)

B. 截至 2019 年 6 月 30 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 June 2019

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	2,986	553	3,539
豁免計劃 Exempted Schemes	203	373	576
總數 Total	3,189	926	4,115

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	1	0	1
受信託所管限 Governed by Trust	5	4	9
總數 Total	6	4	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	65,883	2,651	133,775	159	199,658	2,810
(ii) 界定利益計劃 Defined Benefit Schemes	5,161	74	110,303	102	115,464	176
(iii) 總數 Total	71,044	2,725	244,078	261	315,122	2,986

(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	7,858	169	1,298	2	9,156	171
(ii) 界定利益計劃 Defined Benefit Schemes	143	2	0	0	143	2
(iii) 分項總數 Subtotal	8,001	171	1,298	2	9,299	173
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	7,528	256	22,943	110	30,471	366
(ii) 界定利益計劃 Defined Benefit Schemes	89	4	5,475	10	5,564	14
(iii) 分項總數 Subtotal	7,617	260	28,418	120	36,035	380
(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)	15,386	425	24,241	112	39,627	537
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	232	6	5,475	10	5,707	16
(iii) 總數 Total	15,618	431	29,716	122	45,334	553

(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	7,858	169	1,298	2	9,156	171
(ii) 界定利益計劃 Defined Benefit Schemes	143	2	0	0	143	2
(iii) 分項總數 Subtotal	8,001	171	1,298	2	9,299	173
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	73,411	2,907	156,718	269	230,129	3,176
(ii) 界定利益計劃 Defined Benefit Schemes	5,250	78	115,778	112	121,028	190
(iii) 分項總數 Subtotal	78,661	2,985	272,496	381	351,157	3,366
(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)	81,269	3,076	158,016	271	239,285	3,347
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,393	80	115,778	112	121,171	192
(iii) 總數 Total	86,662	3,156	273,794	383	360,456	3,539

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	3,259	2,594	10,004	158	13,263	2,752
(ii) 界定利益計劃 Defined Benefit Schemes	333	71	7,489	101	7,822	172
(iii) 總數 Total	3,592	2,665	17,493	259	21,085	2,924

(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	167	26	2	64	169
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	38	169	26	2	64	171
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	154	250	1,018	87	1,172	337
(ii) 界定利益計劃 Defined Benefit Schemes	2	4	86	10	88	14
(iii) 分項總數 Subtotal	156	254	1,104	97	1,260	351
(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)	192	417	1,044	89	1,236	506
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	2	6	86	10	88	16
(iii) 總數 Total	194	423	1,130	99	1,324	522

(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	167	26	2	64	169
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	38	169	26	2	64	171
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,413	2,844	11,022	245	14,435	3,089
(ii) 界定利益計劃 Defined Benefit Schemes	335	75	7,575	111	7,910	186
(iii) 分項總數 Subtotal	3,748	2,919	18,597	356	22,345	3,275
(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)	3,451	3,011	11,048	247	14,499	3,258
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	335	77	7,575	111	7,910	188
(iii) 總數 Total	3,786	3,088	18,623	358	22,409	3,446

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	52,194	2,594	158,341	158	210,535	2,752
(ii) 界定利益計劃 Defined Benefit Schemes	4,973	71	116,521	101	121,494	172
(iii) 總數 Total	57,167	2,665	274,862	259	332,029	2,924

(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	939	167	299	2	1,238	169
(ii) 界定利益計劃 Defined Benefit Schemes	116	2	0	0	116	2
(iii) 分項總數 Subtotal	1,055	169	299	2	1,354	171
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,302	250	8,960	87	11,262	337
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	3,188	10	3,216	14
(iii) 分項總數 Subtotal	2,330	254	12,148	97	14,478	351
(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)	3,241	417	9,259	89	12,500	506
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	144	6	3,188	10	3,332	16
(iii) 總數 Total	3,385	423	12,447	99	15,832	522

(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	939	167	299	2	1,238	169
(ii) 界定利益計劃 Defined Benefit Schemes	116	2	0	0	116	2
(iii) 分項總數 Subtotal	1,055	169	299	2	1,354	171
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	54,496	2,844	167,301	245	221,797	3,089
(ii) 界定利益計劃 Defined Benefit Schemes	5,001	75	119,709	111	124,710	186
(iii) 分項總數 Subtotal	59,497	2,919	287,010	356	346,507	3,275
(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)	55,435	3,011	167,600	247	223,035	3,258
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,117	77	119,709	111	124,826	188
(iii) 總數 Total	60,552	3,088	287,309	358	347,861	3,446

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	15	107
50 - < 100	5	9	326
100 - < 500	11	236	3,062
500 - < 1,000	4	82	2,600
1,000 - < 1,500	5	317	5,991
1,500 - < 2,000	0	0	0
>= 2,000	7	2,006	45,081
總數 Total	38	2,665	57,167

(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	57	110
50 - < 100	1	4	10
100 - < 500	9	100	688
500 - < 1,000	4	75	795
1,000 - < 1,500	4	31	206
1,500 - < 2,000	0	0	0
>= 2,000	7	156	1,576
總數 Total	42	423	3,385

(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	72	217
50 - < 100	5	13	336
100 - < 500	13	336	3,750
500 - < 1,000	5	157	3,395
1,000 - < 1,500	5	348	6,197
1,500 - < 2,000	0	0	0
>= 2,000	7	2,162	46,657
總數 Total	56	3,088	60,552

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	15	32
5 - < 10	9	60
10 - < 20	14	201
20 - < 30	13	343
30 - < 40	14	489
40 - < 50	6	276
50 - < 60	14	767
60 - < 70	6	395
70 - < 80	13	967
80 - < 100	9	804
>= 100	146	270,528
總數 Total	259	274,862

(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	25	30
5 - < 10	12	77
10 - < 20	16	216
20 - < 30	6	161
30 - < 40	3	109
40 - < 50	2	93
50 - < 60	2	112
60 - < 70	3	202
70 - < 80	4	299
80 - < 100	2	169
>= 100	24	10,979
總數 Total	99	12,447

(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	40	62
5 - < 10	21	137
10 - < 20	30	417
20 - < 30	19	504
30 - < 40	17	598
40 - < 50	8	369
50 - < 60	16	879
60 - < 70	9	597
70 - < 80	17	1,266
80 - < 100	11	973
>= 100	170	281,507
總數 Total	358	287,309

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	297	148
1 - < 2	325	482
2 - < 10	1,124	5,735
10 - < 20	442	6,235
20 - < 30	158	3,832
30 - < 50	153	5,900
50 - < 100	175	12,205
>=100	250	297,492
總數 Total	2,924	332,029

(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	162	54
1 - < 2	69	98
2 - < 10	160	713
10 - < 20	49	691
20 - < 30	18	451
30 - < 50	16	622
50 - < 100	17	1,219
>=100	31	11,984
總數 Total	522	15,832

(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	459	202
1 - < 2	394	580
2 - < 10	1,284	6,448
10 - < 20	491	6,926
20 - < 30	176	4,283
30 - < 50	169	6,522
50 - < 100	192	13,424
>=100	281	309,476
總數 Total	3,446	347,861

註：統計數字乃根據截至2019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 2019 in respect of registered schemes.