

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12月31日，總共有4,028個職業退休計劃，包括3,469個職業退休註冊計劃及559個職業退休豁免計劃。在這4,028個職業退休計劃中，有3,123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 2019, there were 4,028 ORSO schemes, comprising of 3,469 ORSO registered schemes and 559 ORSO exempted schemes. Out of these 4,028 ORSO schemes 3,123 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	2,863 (92%)	260 (8%)	3,123 (100%)
沒有強積金豁免 Non-MPF Exempted	766 (85%)	139 (15%)	905 (100%)
總數 Total	3,629 (90%)	399 (10%)	4,028 (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%)	3,030 (97%)	74 (2%)	3,123 (100%)
沒有強積金豁免 Non-MPF Exempted	213 (24%)	629 (70%)	63 (7%)	905 (100%)*
總數 Total	232 (6%)	3,659 (91%)	137 (3%)	4,028 (100%)

* 因四捨五入的關係，各項百分比的總和未必等同總計數字。

Percentage may not sum up to the total due to rounding.

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	2,920 (93%)	203 (7%)	3,123 (100%)
沒有強積金豁免 Non-MPF Exempted	590 (65%)	315 (35%)	905 (100%)
總數 Total	3,510 (87%)	518 (13%)	4,028 (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	2,671 (91%)	252 (9%)	2,923 (100%)
沒有強積金豁免 Non-MPF Exempted	423 (77%)	123 (23%)	546 (100%)
總數 Total	3,094 (89%)	375 (11%)	3,469 (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	306,524 (99%)	2,497 (1%)	309,021 (100%)
沒有強積金豁免 Non-MPF Exempted	44,660 (97%)	1,220 (3%)	45,880 (100%)
總數 Total	351,184 (99%)	3,717 (1%)	354,901 (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	16,635 (78%)	4,669 (22%)	21,304 (100%)
沒有強積金豁免 Non-MPF Exempted	847 (54%)	715 (46%)	1,562 (100%)
總數 Total	17,482 (76%)	5,384 (24%)	22,866 (100%)

B. 截至 2019 年 12 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 December 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	2,923	546	3,469
豁免計劃 Exempted Schemes	200	359	559
總數 Total	3,123	905	4,028

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	4	12
總數 Total	8	4	12

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	60,341	2,597	134,320	154	194,661	2,751
(ii) 界定利益計劃 Defined Benefit Schemes	4,826	74	109,534	98	114,360	172
(iii) 總數 Total	65,167	2,671	243,854	252	309,021	2,923

(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	7,490	162	1,395	2	8,885	164
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,627	164	1,395	2	9,022	166
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	7,611	254	23,429	111	31,040	365
(ii) 界定利益計劃 Defined Benefit Schemes	283	5	5,535	10	5,818	15
(iii) 分項總數 Subtotal	7,894	259	28,964	121	36,858	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)	15,101	416	24,824	113	39,925	529
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	420	7	5,535	10	5,955	17
(iii) 總數 Total	15,521	423	30,359	123	45,880	546

(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	7,490	162	1,395	2	8,885	164
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,627	164	1,395	2	9,022	166
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	67,952	2,851	157,749	265	225,701	3,116
(ii) 界定利益計劃 Defined Benefit Schemes	5,109	79	115,069	108	120,178	187
(iii) 分項總數 Subtotal	73,061	2,930	272,818	373	345,879	3,303
(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)	75,442	3,013	159,144	267	234,586	3,280
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,246	81	115,069	108	120,315	189
(iii) 總數 Total	80,688	3,094	274,213	375	354,901	3,469

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	3,168	2,550	11,001	154	14,169	2,704
(ii) 界定利益計劃 Defined Benefit Schemes	309	70	6,826	97	7,135	167
(iii) 總數 Total	3,477	2,620	17,827	251	21,304	2,871

(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	159	28	2	69	161
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	41	161	28	2	69	163
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	156	249	1,250	91	1,406	340
(ii) 界定利益計劃 Defined Benefit Schemes	3	4	84	10	87	14
(iii) 分項總數 Subtotal	159	253	1,334	101	1,493	354
(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)	197	408	1,278	93	1,475	501
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	3	6	84	10	87	16
(iii) 總數 Total	200	414	1,362	103	1,562	517

(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	159	28	2	69	161
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	41	161	28	2	69	163
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,324	2,799	12,251	245	15,575	3,044
(ii) 界定利益計劃 Defined Benefit Schemes	312	74	6,910	107	7,222	181
(iii) 分項總數 Subtotal	3,636	2,873	19,161	352	22,797	3,225
(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)	3,365	2,958	12,279	247	15,644	3,205
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	312	76	6,910	107	7,222	183
(iii) 總數 Total	3,677	3,034	19,189	354	22,866	3,388

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	49,180	2,550	156,356	154	205,536	2,704
(ii) 界定利益計劃 Defined Benefit Schemes	4,516	70	101,896	97	106,412	167
(iii) 總數 Total	53,696	2,620	258,252	251	311,948	2,871

(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	865	159	292	2	1,157	161
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	964	161	292	2	1,256	163
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,192	249	9,276	91	11,468	340
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	3,099	10	3,127	14
(iii) 分項總數 Subtotal	2,220	253	12,375	101	14,595	354
(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)	3,057	408	9,568	93	12,625	501
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	127	6	3,099	10	3,226	16
(iii) 總數 Total	3,184	414	12,667	103	15,851	517

(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	865	159	292	2	1,157	161
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	964	161	292	2	1,256	163
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	51,372	2,799	165,632	245	217,004	3,044
(ii) 界定利益計劃 Defined Benefit Schemes	4,544	74	104,995	107	109,539	181
(iii) 分項總數 Subtotal	55,916	2,873	270,627	352	326,543	3,225
(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)	52,237	2,958	165,924	247	218,161	3,205
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,643	76	104,995	107	109,638	183
(iii) 總數 Total	56,880	3,034	270,919	354	327,799	3,388

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	5	14	81
50 - < 100	6	10	379
100 - < 500	12	235	3,378
500 - < 1,000	4	201	2,912
1,000 - < 1,500	4	194	5,049
1,500 - < 2,000	1	28	1,937
>= 2,000	6	1,938	39,960
總數 Total	38	2,620	53,696

(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	15	54	97
50 - < 100	1	4	10
100 - < 500	9	99	749
500 - < 1,000	5	93	809
1,000 - < 1,500	3	8	83
1,500 - < 2,000	1	4	32
>= 2,000	6	152	1,404
總數 Total	40	414	3,184

(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	19	68	178
50 - < 100	6	14	389
100 - < 500	14	334	4,127
500 - < 1,000	5	294	3,721
1,000 - < 1,500	4	202	5,132
1,500 - < 2,000	1	32	1,969
>= 2,000	6	2,090	41,364
總數 Total	55	3,034	56,880

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	26
5 - < 10	12	80
10 - < 20	12	179
20 - < 30	14	351
30 - < 40	11	372
40 - < 50	11	492
50 - < 60	9	503
60 - < 70	8	526
70 - < 80	9	675
80 - < 100	12	1,096
>= 100	138	253,952
總數 Total	251	258,252

(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	28	35
5 - < 10	16	116
10 - < 20	13	185
20 - < 30	5	130
30 - < 40	5	170
40 - < 50	1	46
50 - < 60	1	52
60 - < 70	4	252
70 - < 80	3	229
80 - < 100	3	275
>= 100	24	11,177
總數 Total	103	12,667

(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	43	61
5 - < 10	28	196
10 - < 20	25	364
20 - < 30	19	481
30 - < 40	16	542
40 - < 50	12	538
50 - < 60	10	555
60 - < 70	12	778
70 - < 80	12	904
80 - < 100	15	1,371
> = 100	162	265,129
總數 Total	354	270,919

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	315	159
1 - <2	313	469
2 - <10	1,119	5,688
10 - <20	408	5,678
20 - <30	171	4,157
30 - <50	148	5,843
50 - <100	163	11,580
>=100	234	278,374
總數 Total	2,871	311,948

(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	158	50
1 - <2	75	106
2 - <10	155	703
10 - <20	45	637
20 - <30	18	435
30 - <50	19	704
50 - <100	16	1,129
>=100	31	12,087
總數 Total	517	15,851

(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	473	209
1 - <2	388	575
2 - <10	1,274	6,391
10 - <20	453	6,315
20 - <30	189	4,592
30 - <50	167	6,547
50 - <100	179	12,709
>=100	265	290,461
總數 Total	3,388	327,799

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