

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 2020

A. 職業退休計劃統計數字概要

ORSO Schemes Statistical Highlights

截至2020年3月31日，總共有4,006個職業退休計劃，包括3,451個職業退休註冊計劃及555個職業退休豁免計劃。在這4,006個職業退休計劃中，有3,108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 2020, there were 4,006 ORSO schemes, comprising of 3,451 ORSO registered schemes and 555 ORSO exempted schemes. Out of these 4,006 ORSO schemes 3,108 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	2,849 (92%)	259 (8%)	3,108 (100%)
沒有強積金豁免 Non-MPF Exempted	759 (85%)	139 (15%)	898 (100%)
總數 Total	3,608 (90%)	398 (10%)	4,006 (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%)	3,016 (97%)	73 (2%)	3,108 (100%)
沒有強積金豁免 Non-MPF Exempted	212 (24%)	623 (69%)	63 (7%)	898 (100%)
總數 Total	231 (6%)	3,639 (91%)	136 (3%)	4,006 (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	2,906 (94%)	202 (6%)	3,108 (100%)
沒有強積金豁免 Non-MPF Exempted	584 (65%)	314 (35%)	898 (100%)
總數 Total	3,490 (87%)	516 (13%)	4,006 (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	2,658 (91%)	251 (9%)	2,909 (100%)
沒有強積金豁免 Non-MPF Exempted	419 (77%)	123 (23%)	542 (100%)
總數 Total	3,077 (89%)	374 (11%)	3,451 (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	305,786 (99%)	2,532 (1%)	308,318 (100%)
沒有強積金豁免 Non-MPF Exempted	47,663 (97%)	1,251 (3%)	48,914 (100%)
總數 Total	353,449 (99%)	3,783 (1%)	357,232 (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	16,429 (78%)	4,637 (22%)	21,066 (100%)
沒有強積金豁免 Non-MPF Exempted	1,450 (66%)	740 (34%)	2,190 (100%)
總數 Total	17,879 (77%)	5,377 (23%)	23,256 (100%)

B. 截至 2020 年 3 月 31 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 31 March 2020

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	2,909	542	3,451
豁免計劃 Exempted Schemes	199	356	555
總數 Total	3,108	898	4,006

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	4	2	6
總數 Total	4	2	6

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	60,316	2,585	134,232	153	194,548	2,738
(ii) 界定利益計劃 Defined Benefit Schemes	4,783	73	108,987	98	113,770	171
(iii) 總數 Total	65,099	2,658	243,219	251	308,318	2,909

(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	161	1,395	2	8,885	163
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,627	163	1,395	2	9,022	165
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	10,455	251	23,619	111	34,074	362
(ii) 界定利益計劃 Defined Benefit Schemes	283	5	5,535	10	5,818	15
(iii) 分項總數 Subtotal	10,738	256	29,154	121	39,892	377
(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)	17,945	412	25,014	113	42,959	525
(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	18,365	419	30,549	123	48,914	542

(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	161	1,395	2	8,885	163
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,627	163	1,395	2	9,022	165
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	70,771	2,836	157,851	264	228,622	3,100
(ii) 界定利益計劃 Defined Benefit Schemes	5,066	78	114,522	108	119,588	186
(iii) 分項總數 Subtotal	75,837	2,914	272,373	372	348,210	3,286
(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)	78,261	2,997	159,246	266	237,507	3,263
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,203	80	114,522	108	119,725	188
(iii) 總數 Total	83,464	3,077	273,768	374	357,232	3,451

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	2,956	2,535	11,006	153	13,962	2,688
(ii) 界定利益計劃 Defined Benefit Schemes	306	69	6,798	97	7,104	166
(iii) 總數 Total	3,262	2,604	17,804	250	21,066	2,854

(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	158	28	2	69	160
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	41	160	28	2	69	162
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	358	245	1,676	92	2,034	337
(ii) 界定利益計劃 Defined Benefit Schemes	2	4	85	10	87	14
(iii) 分項總數 Subtotal	360	249	1,761	102	2,121	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)	399	403	1,704	94	2,103	497
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	2	6	85	10	87	16
(iii) 總數 Total	401	409	1,789	104	2,190	513

(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	158	28	2	69	160
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	41	160	28	2	69	162
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,314	2,780	12,682	245	15,996	3,025
(ii) 界定利益計劃 Defined Benefit Schemes	308	73	6,883	107	7,191	180
(iii) 分項總數 Subtotal	3,622	2,853	19,565	352	23,187	3,205
(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)	3,355	2,938	12,710	247	16,065	3,185
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	308	75	6,883	107	7,191	182
(iii) 總數 Total	3,663	3,013	19,593	354	23,256	3,367

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	47,419	2,535	155,201	153	202,620	2,688
(ii) 界定利益計劃 Defined Benefit Schemes	4,466	69	107,044	97	111,510	166
(iii) 總數 Total	51,885	2,604	262,245	250	314,130	2,854

(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	158	293	2	1,158	160
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	964	160	293	2	1,257	162
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,773	245	9,703	92	13,476	337
(ii) 界定利益計劃 Defined Benefit Schemes	27	4	3,100	10	3,127	14
(iii) 分項總數 Subtotal	3,800	249	12,803	102	16,603	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)	4,638	403	9,996	94	14,634	497
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	126	6	3,100	10	3,226	16
(iii) 總數 Total	4,764	409	13,096	104	17,860	513

(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	158	293	2	1,158	160
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	964	160	293	2	1,257	162
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	51,192	2,780	164,904	245	216,096	3,025
(ii) 界定利益計劃 Defined Benefit Schemes	4,493	73	110,144	107	114,637	180
(iii) 分項總數 Subtotal	55,685	2,853	275,048	352	330,733	3,205
(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)	52,057	2,938	165,197	247	217,254	3,185
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,592	75	110,144	107	114,736	182
(iii) 總數 Total	56,649	3,013	275,341	354	331,990	3,367

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	380
100 - < 500	12	235	3,374
500 - < 1,000	4	200	2,835
1,000 - < 1,500	4	192	5,047
1,500 - < 2,000	1	28	1,937
>= 2,000	6	1,925	38,231
總數 Total	38	2,604	51,885

(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	8
100 - < 500	9	97	682
500 - < 1,000	5	91	809
1,000 - < 1,500	3	8	81
1,500 - < 2,000	1	4	32
>= 2,000	6	151	3,055
總數 Total	40	409	4,764

(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	388
100 - < 500	14	332	4,056
500 - < 1,000	5	291	3,644
1,000 - < 1,500	4	200	5,128
1,500 - < 2,000	1	32	1,969
>= 2,000	6	2,076	41,286
總數 Total	55	3,013	56,649

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	26
5 - < 10	11	75
10 - < 20	12	179
20 - < 30	14	351
30 - < 40	11	372
40 - < 50	11	492
50 - < 60	9	503
60 - < 70	9	595
70 - < 80	7	521
80 - < 100	13	1,179
>= 100	137	257,952
總數 Total	250	262,245

(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	26
5 - < 10	16	118
10 - < 20	13	186
20 - < 30	5	130
30 - < 40	5	170
40 - < 50	1	46
50 - < 60	2	107
60 - < 70	4	252
70 - < 80	3	229
80 - < 100	2	193
>= 100	25	11,639
總數 Total	104	13,096

(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	44	52
5 - < 10	27	193
10 - < 20	25	365
20 - < 30	19	481
30 - < 40	16	542
40 - < 50	12	538
50 - < 60	11	610
60 - < 70	13	847
70 - < 80	10	750
80 - < 100	15	1,372
>= 100	162	269,591
總數 Total	354	275,341

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	311	155
1 - <2	309	462
2 - <10	1,109	5,613
10 - <20	415	5,778
20 - <30	169	4,113
30 - <50	147	5,811
50 - <100	163	11,593
>=100	231	280,605
總數 Total	2,854	314,130

(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	156	50
1 - <2	75	105
2 - <10	152	692
10 - <20	45	637
20 - <30	18	435
30 - <50	19	705
50 - <100	15	1,034
>=100	33	14,202
總數 Total	513	17,860

(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	467	205
1 - <2	384	567
2 - <10	1,261	6,305
10 - <20	460	6,415
20 - <30	187	4,548
30 - <50	166	6,516
50 - <100	178	12,627
>=100	264	294,807
總數 Total	3,367	331,990

註：統計數字乃根據截至2020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 2020 in respect of registered schemes.