

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2020年6月30日，總共有3,976個職業退休計劃，包括3,426個職業退休註冊計劃及550個職業退休豁免計劃。在這3,976個職業退休計劃中，有3,089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 2020, there were 3,976 ORSO schemes, comprising of 3,426 ORSO registered schemes and 550 ORSO exempted schemes. Out of these 3,976 ORSO schemes 3,089 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	2,830 (92%)	259 (8%)	3,089 (100%)
沒有強積金豁免 Non-MPF Exempted	748 (84%)	139 (16%)	887 (100%)
總數 Total	3,578 (90%)	398 (10%)	3,976 (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	18 (1%)	2,998 (97%)	73 (2%)	3,089 (100%)
沒有強積金豁免 Non-MPF Exempted	209 (24%)	615 (69%)	63 (7%)	887 (100%)
總數 Total	227 (6%)	3,613 (91%)	136 (3%)	3,976 (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	2,889 (94%)	200 (6%)	3,089 (100%)
沒有強積金豁免 Non-MPF Exempted	575 (65%)	312 (35%)	887 (100%)
總數 Total	3,464 (87%)	512 (13%)	3,976 (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	2,644 (91%)	248 (9%)	2,892 (100%)
沒有強積金豁免 Non-MPF Exempted	413 (77%)	121 (23%)	534 (100%)
總數 Total	3,057 (89%)	369 (11%)	3,426 (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	305,130 (99%)	2,562 (1%)	307,692 (100%)
沒有強積金豁免 Non-MPF Exempted	47,531 (97%)	1,244 (3%)	48,775 (100%)
總數 Total	352,661 (99%)	3,806 (1%)	356,467 (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	16,559 (78%)	4,677 (22%)	21,236 (100%)
沒有強積金豁免 Non-MPF Exempted	1,444 (73%)	534 (27%)	1,978 (100%)
總數 Total	18,003 (78%)	5,211 (22%)	23,214 (100%)

B. 截至 2020 年 6 月 30 日的 職業退休計劃統計數字
Statistics on ORSO Schemes as at 30 June 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	2,892	534	3,426
豁免計劃 Exempted Schemes	197	353	550
總數 Total	3,089	887	3,976

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	1	3	4
總數 Total	1	3	4

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	59,982	2,570	133,367	150	193,349	2,720
(ii) 界定利益計劃 Defined Benefit Schemes	5,483	74	108,860	98	114,343	172
(iii) 總數 Total	65,465	2,644	242,227	248	307,692	2,892

(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	7,468	158	1,395	2	8,863	160
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,605	160	1,395	2	9,000	162
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	10,425	248	23,540	109	33,965	357
(ii) 界定利益計劃 Defined Benefit Schemes	278	5	5,532	10	5,810	15
(iii) 分項總數 Subtotal	10,703	253	29,072	119	39,775	372
(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)	17,893	406	24,935	111	42,828	517
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	415	7	5,532	10	5,947	17
(iii) 總數 Total	18,308	413	30,467	121	48,775	534

(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	7,468	158	1,395	2	8,863	160
(ii) 界定利益計劃 Defined Benefit Schemes	137	2	0	0	137	2
(iii) 分項總數 Subtotal	7,605	160	1,395	2	9,000	162
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	70,407	2,818	156,907	259	227,314	3,077
(ii) 界定利益計劃 Defined Benefit Schemes	5,761	79	114,392	108	120,153	187
(iii) 分項總數 Subtotal	76,168	2,897	271,299	367	347,467	3,264
(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)	77,875	2,976	158,302	261	236,177	3,237
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,898	81	114,392	108	120,290	189
(iii) 總數 Total	83,773	3,057	272,694	369	356,467	3,426

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	3,127	2,523	11,001	150	14,128	2,673
(ii) 界定利益計劃 Defined Benefit Schemes	310	69	6,798	97	7,108	166
(iii) 總數 Total	3,437	2,592	17,799	247	21,236	2,839

(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	40	155	28	2	68	157
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	40	157	28	2	68	159
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	356	242	1,467	87	1,823	329
(ii) 界定利益計劃 Defined Benefit Schemes	2	4	85	10	87	14
(iii) 分項總數 Subtotal	358	246	1,552	97	1,910	343
(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)	396	397	1,495	89	1,891	486
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	2	6	85	10	87	16
(iii) 總數 Total	398	403	1,580	99	1,978	502

(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	40	155	28	2	68	157
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	40	157	28	2	68	159
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,483	2,765	12,468	237	15,951	3,002
(ii) 界定利益計劃 Defined Benefit Schemes	312	73	6,883	107	7,195	180
(iii) 分項總數 Subtotal	3,795	2,838	19,351	344	23,146	3,182
(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)	3,523	2,920	12,496	239	16,019	3,159
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	312	75	6,883	107	7,195	182
(iii) 總數 Total	3,835	2,995	19,379	346	23,214	3,341

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	47,374	2,523	155,225	150	202,599	2,673
(ii) 界定利益計劃 Defined Benefit Schemes	4,433	69	107,294	97	111,727	166
(iii) 總數 Total	51,807	2,592	262,519	247	314,326	2,839

(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	852	155	293	2	1,145	157
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	951	157	293	2	1,244	159
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,759	242	9,313	87	13,072	329
(ii) 界定利益計劃 Defined Benefit Schemes	28	4	3,100	10	3,128	14
(iii) 分項總數 Subtotal	3,787	246	12,413	97	16,200	343
(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)	4,611	397	9,606	89	14,217	486
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	127	6	3,100	10	3,227	16
(iii) 總數 Total	4,738	403	12,706	99	17,444	502

(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	852	155	293	2	1,145	157
(ii) 界定利益計劃 Defined Benefit Schemes	99	2	0	0	99	2
(iii) 分項總數 Subtotal	951	157	293	2	1,244	159
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	51,133	2,765	164,538	237	215,671	3,002
(ii) 界定利益計劃 Defined Benefit Schemes	4,461	73	110,394	107	114,855	180
(iii) 分項總數 Subtotal	55,594	2,838	274,932	344	330,526	3,182
(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)	51,985	2,920	164,831	239	216,816	3,159
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4,560	75	110,394	107	114,954	182
(iii) 總數 Total	56,545	2,995	275,225	346	331,770	3,341

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	129
50 - < 100	5	9	306
100 - < 500	12	235	3,353
500 - < 1,000	5	206	3,793
1,000 - < 1,500	3	183	3,708
1,500 - < 2,000	1	28	1,926
>= 2,000	6	1,916	38,592
總數 Total	38	2,592	51,807

(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	52	95
50 - < 100	1	4	8
100 - < 500	9	96	668
500 - < 1,000	5	90	808
1,000 - < 1,500	3	8	82
1,500 - < 2,000	1	4	32
>= 2,000	6	149	3,045
總數 Total	40	403	4,738

(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	20	67	224
50 - < 100	5	13	314
100 - < 500	14	331	4,021
500 - < 1,000	6	296	4,601
1,000 - < 1,500	3	191	3,790
1,500 - < 2,000	1	32	1,958
>= 2,000	6	2,065	41,637
總數 Total	55	2,995	56,545

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	25
5 - < 10	11	76
10 - < 20	12	180
20 - < 30	14	344
30 - < 40	10	339
40 - < 50	10	450
50 - < 60	10	554
60 - < 70	9	595
70 - < 80	7	523
80 - < 100	13	1,179
>= 100	135	258,254
總數 Total	247	262,519

(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)
<5	26	26
5 - < 10	16	118
10 - < 20	12	174
20 - < 30	5	130
30 - < 40	3	94
40 - < 50	2	86
50 - < 60	2	107
60 - < 70	4	252
70 - < 80	3	229
80 - < 100	2	193
>= 100	24	11,297
總數 Total	99	12,706

(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	42	51
5 - < 10	27	194
10 - < 20	24	354
20 - < 30	19	474
30 - < 40	13	433
40 - < 50	12	536
50 - < 60	12	661
60 - < 70	13	847
70 - < 80	10	752
80 - < 100	15	1,372
>= 100	159	269,551
總數 Total	346	275,225

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	312	157
1 - < 2	302	453
2 - < 10	1,110	5,629
10 - < 20	410	5,701
20 - < 30	169	4,107
30 - < 50	146	5,777
50 - < 100	162	11,553
>=100	228	280,949
總數 Total	2,839	314,326

(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	151	48
1 - < 2	73	102
2 - < 10	152	692
10 - < 20	43	617
20 - < 30	19	459
30 - < 50	17	628
50 - < 100	15	1,034
>=100	32	13,864
總數 Total	502	17,444

(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	463	205
1 - < 2	375	555
2 - < 10	1,262	6,321
10 - < 20	453	6,318
20 - < 30	188	4,566
30 - < 50	163	6,405
50 - < 100	177	12,587
>=100	260	294,813
總數 Total	3,341	331,770

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