

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2021年3月31日，總共有3,788個職業退休計劃，包括3,283個職業退休註冊計劃及505個職業退休豁免計劃。在這3,788個職業退休計劃中，有2,967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 2021, there were 3,788 ORSO schemes, comprising of 3,283 ORSO registered schemes and 505 ORSO exempted schemes. Out of these 3,788 ORSO schemes 2,967 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	2,721 (92%)	246 (8%)	2,967 (100%)
沒有強積金豁免 Non-MPF Exempted	691 (84%)	130 (16%)	821 (100%)
總數 Total	3,412 (90%)	376 (10%)	3,788 (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	17 (1%)	2,882 (97%)	68 (2%)	2,967 (100%)
沒有強積金豁免 Non-MPF Exempted	184 (22%)	578 (70%)	59 (7%)	821 (100%)*
總數 Total	201 (5%)	3,460 (91%)	127 (3%)	3,788 (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	2,782 (94%)	185 (6%)	2,967 (100%)
沒有強積金豁免 Non-MPF Exempted	535 (65%)	286 (35%)	821 (100%)
總數 Total	3,317 (88%)	471 (12%)	3,788 (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	2,543 (91%)	241 (9%)	2,784 (100%)
沒有強積金豁免 Non-MPF Exempted	386 (77%)	113 (23%)	499 (100%)
總數 Total	2,929 (89%)	354 (11%)	3,283 (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	275,583 (98%)	5,696 (2%)	281,279 (100%)
沒有強積金豁免 Non-MPF Exempted	54,280 (98%)	1,302 (2%)	55,582 (100%)
總數 Total	329,863 (98%)	6,998 (2%)	336,861 (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	16,768 (80%)	4,252 (20%)	21,020 (100%)
沒有強積金豁免 Non-MPF Exempted	1,318 (46%)	1,560 (54%)	2,878 (100%)
總數 Total	18,086 (76%)	5,812 (24%)	23,898 (100%)

B. 截至 2021 年 3 月 31 日的 職業 退休 計劃 統計 數字

Statistics on ORSO Schemes as at 31 March 2021

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	2,784	499	3,283
豁 免 計 劃 Exempted Schemes	183	322	505
總 數 Total	2,967	821	3,788

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	1	5
總 數 Total	4	1	5

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	55,529	2,474	114,614	145	170,143	2,619
(ii) 界定利益計劃 Defined Benefit Schemes	5,133	69	106,003	96	111,136	165
(iii) 總數 Total	60,662	2,543	220,617	241	281,279	2,784

(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	7,034	139	796	2	7,830	141
(ii) 界定利益計劃 Defined Benefit Schemes	121	2	0	0	121	2
(iii) 分項總數 Subtotal	7,155	141	796	2	7,951	143
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	6,691	240	35,046	101	41,737	341
(ii) 界定利益計劃 Defined Benefit Schemes	227	5	5,667	10	5,894	15
(iii) 分項總數 Subtotal	6,918	245	40,713	111	47,631	356
(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)	13,725	379	35,842	103	49,567	482
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	348	7	5,667	10	6,015	17
(iii) 總數 Total	14,073	386	41,509	113	55,582	499

(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	7,034	139	796	2	7,830	141
(ii) 界定利益計劃 Defined Benefit Schemes	121	2	0	0	121	2
(iii) 分項總數 Subtotal	7,155	141	796	2	7,951	143
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	62,220	2,714	149,660	246	211,880	2,960
(ii) 界定利益計劃 Defined Benefit Schemes	5,360	74	111,670	106	117,030	180
(iii) 分項總數 Subtotal	67,580	2,788	261,330	352	328,910	3,140
(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)	69,254	2,853	150,456	248	219,710	3,101
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,481	76	111,670	106	117,151	182
(iii) 總數 Total	74,735	2,929	262,126	354	336,861	3,283

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	3,065	2,457	9,847	143	12,912	2,600
(ii) 界定利益計劃 Defined Benefit Schemes	352	68	7,756	95	8,108	163
(iii) 總數 Total	3,417	2,525	17,603	238	21,020	2,763

(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	44	139	24	2	68	141
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	44	141	24	2	68	143
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	187	233	2,499	89	2,686	322
(ii) 界定利益計劃 Defined Benefit Schemes	4	5	120	10	124	15
(iii) 分項總數 Subtotal	191	238	2,619	99	2,810	337
(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)	231	372	2,523	91	2,754	463
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	4	7	120	10	124	17
(iii) 總數 Total	235	379	2,643	101	2,878	480

(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	44	139	24	2	68	141
(ii) 界定利益計劃 Defined Benefit Schemes	0	2	0	0	0	2
(iii) 分項總數 Subtotal	44	141	24	2	68	143
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	3,252	2,690	12,346	232	15,598	2,922
(ii) 界定利益計劃 Defined Benefit Schemes	356	73	7,876	105	8,232	178
(iii) 分項總數 Subtotal	3,608	2,763	20,222	337	23,830	3,100
(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)	3,296	2,829	12,370	234	15,666	3,063
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	356	75	7,876	105	8,232	180
(iii) 總數 Total	3,652	2,904	20,246	339	23,898	3,243

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	49,088	2,457	149,500	143	198,588	2,600
(ii) 界定利益計劃 Defined Benefit Schemes	4,871	68	106,657	95	111,528	163
(iii) 總數 Total	53,959	2,525	256,157	238	310,116	2,763

(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	819	139	330	2	1,149	141
(ii) 界定利益計劃 Defined Benefit Schemes	106	2	0	0	106	2
(iii) 分項總數 Subtotal	925	141	330	2	1,255	143
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	2,125	233	14,989	89	17,114	322
(ii) 界定利益計劃 Defined Benefit Schemes	101	5	3,492	10	3,593	15
(iii) 分項總數 Subtotal	2,226	238	18,481	99	20,707	337
(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)	2,944	372	15,319	91	18,263	463
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	207	7	3,492	10	3,699	17
(iii) 總數 Total	3,151	379	18,811	101	21,962	480

(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	819	139	330	2	1,149	141
(ii) 界定利益計劃 Defined Benefit Schemes	106	2	0	0	106	2
(iii) 分項總數 Subtotal	925	141	330	2	1,255	143
(B) 受信託所管限 Governed by Trust						
(i) 界定供款計劃 Defined Contribution Schemes	51,213	2,690	164,489	232	215,702	2,922
(ii) 界定利益計劃 Defined Benefit Schemes	4,972	73	110,149	105	115,121	178
(iii) 分項總數 Subtotal	56,185	2,763	274,638	337	330,823	3,100
(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)	52,032	2,829	164,819	234	216,851	3,063
(ii) 界定利益計劃 Defined Benefit Schemes (A)(ii)+(B)(ii)	5,078	75	110,149	105	115,227	180
(iii) 總數 Total	57,110	2,904	274,968	339	332,078	3,243

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	14	146
50 - < 100	4	8	264
100 - < 500	10	232	2,775
500 - < 1,000	5	166	3,489
1,000 - < 1,500	3	178	3,724
1,500 - < 2,000	0	0	0
> = 2,000	8	1,927	43,561
總數 Total	36	2,525	53,959

(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	14	47	96
50 - < 100	1	4	8
100 - < 500	9	90	757
500 - < 1,000	4	82	707
1,000 - < 1,500	3	8	84
1,500 - < 2,000	0	0	0
> = 2,000	8	148	1,499
總數 Total	39	379	3,151

(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	61	242
50 - < 100	4	12	272
100 - < 500	12	322	3,532
500 - < 1,000	6	248	4,196
1,000 - < 1,500	3	186	3,808
1,500 - < 2,000	0	0	0
> = 2,000	8	2,075	45,060
總數 Total	52	2,904	57,110

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	10	74
10 - < 20	16	254
20 - < 30	13	316
30 - < 40	7	250
40 - < 50	9	407
50 - < 60	10	543
60 - < 70	5	326
70 - < 80	10	748
80 - < 100	12	1,078
>= 100	131	252,135
總數 Total	238	256,157

(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	20	26
5 - < 10	18	130
10 - < 20	16	215
20 - < 30	7	167
30 - < 40	2	71
40 - < 50	3	128
50 - < 60	4	215
60 - < 70	2	131
70 - < 80	2	154
80 - < 100	1	81
>= 100	26	17,493
總數 Total	101	18,811

(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	35	52
5 - < 10	28	204
10 - < 20	32	469
20 - < 30	20	483
30 - < 40	9	321
40 - < 50	12	535
50 - < 60	14	758
60 - < 70	7	457
70 - < 80	12	902
80 - < 100	13	1,159
>= 100	157	269,628
總數 Total	339	274,968

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	291	140
1 - < 2	295	442
2 - < 10	1,069	5,445
10 - < 20	415	5,853
20 - < 30	157	3,791
30 - < 50	148	5,831
50 - < 100	159	11,302
>=100	229	277,312
總數 Total	2,763	310,116

(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	124	39
1 - < 2	84	120
2 - < 10	142	662
10 - < 20	46	641
20 - < 30	21	519
30 - < 50	16	614
50 - < 100	15	1,037
>=100	32	18,330
總數 Total	480	21,962

(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	415	179
1 - < 2	379	562
2 - < 10	1,211	6,107
10 - < 20	461	6,494
20 - < 30	178	4,310
30 - < 50	164	6,445
50 - < 100	174	12,339
>=100	261	295,642
總數 Total	3,243	332,078

註：統計數字乃根據截至2021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 2021 in respect of registered schemes.