
OLD AGE LIVING ALLOWANCE

長者生活津貼

9.10.2012

OLD AGE LIVING ALLOWANCE (OALA)

長者生活津貼

- **For poverty alleviation**

旨在扶貧

- a new form of financial support measure under Social Security Allowance Scheme for needy Hong Kong (HK) elders aged 65 or above

公共福利金計劃下的一項新經濟支援措施，向年滿65歲有需要的香港長者提供

- \$2,200 per month

每月2,200元

POSITIONING OF OALA

長者生活津貼的定位

- For elders falling between Old Age Allowance (OAA)/Disability Allowance (DA) and Comprehensive Social Security Assistance (CSSA)

為處於高齡津貼／傷殘津貼和綜合社會保障援助(綜援)之間的長者而設

- unlike CSSA, not to be entirely relied upon for subsistence
非如綜援般供賴以為生
- different from DA and Higher OAA which are provided irrespective of means
與不顧及經濟狀況的傷殘津貼和高額高齡津貼不同

NEED FOR MEETING INCOME AND ASSET REQUIREMENTS

設入息和資產規定的需要

- Identify elders with financial need according to positioning of the allowance
按津貼定位辨識有經濟需要長者
- Long term sustainability in the context of an ageing population 人口高齡化情況下的長遠可持續性
 1. increase in elderly population 長者人口上升

present 現時	980 000
2022	1 520 000
2032	2 210 000
2041	2 560 000

NEED FOR MEETING INCOME AND ASSET REQUIREMENTS (Cont'd)

設入息和資產規定的需要(續)

2. drastic increase in elderly dependency ratio (183 in 2012 to 497 in 2041) and economic dependency ratio (871 in 2012 to 1 140 in 2029)

老年撫養比率(2012年 – 183; 2041年 – 497)和經濟撫養比率(2012年 – 871; 2029年 – 1 140)飆升

3. resource implications for welfare and health care systems and other public services

對福利和醫療系統，以及其他公共服務的資源影響

KEY FEATURES

主要特點

- Same eligibility criteria as Normal OAA
與普通高齡津貼申請資格看齊
 1. aged 65 or above
年滿65歲
 2. HK resident for at least 7 years ; resided in HK continuously for at least 1 year immediately before the date of application
成爲香港居民最少7年；緊接申請日前連續居港最少1年
 3. meet income and asset requirements on a personal/couple basis
[singletons – monthly income limit = \$6,660, asset limit = \$186,000
couples – monthly income limit = \$10,520, asset limit = \$281,000]
符合以個人/夫婦爲單位的入息及資產規定
[單身人士 – 每月入息限額 = 6,660元, 資產限額 = 186,000元
夫婦 – 每月入息限額 = 10,520元, 資產限額 = 281,000元]

KEY FEATURES (Cont'd)

主要特點 (續)

- Same residence requirements during receipt of payment as OAA and DA
與高齡津貼和傷殘津貼相同的領款期間居港規定
- No double benefits
不得享用雙重福利
- Annually adjusted payment rates, and income and asset limits
每年調整津貼金額，以及入息和資產限額

NEXT STEPS

下一步工作

Mid-October: consult LegCo Panel on
Welfare Services

10月中：諮詢立法會福利事務委員會

26 October: seek funding approval of LegCo
Finance Committee

10月26日：向立法會財務委員會申請撥款

IMPLEMENTATION

執行安排

- **Effective date** 生效日期
- **First day of the month of LegCo Finance Committee's approval (only for applications received by 31 December 2013)**
立法會財務委員會批准撥款當月首天 (只適用於2013年12月31日或之前接獲的申請)
- **For eligible elders, the OALA payment will count from the effective date**
合資格長者獲發的長者生活津貼款項，將由生效日期起計

IMPLEMENTATION (Cont'd)

執行安排(續)

- Simplified application procedures 簡化申請程序
 1. auto-conversion: all 290 000 former and current Normal OAA recipients who are still on OAA
自動轉換：所有29萬名現時仍領取高齡津貼的前度普通高齡津貼受惠人及現有普通高齡津貼受惠人
 2. postal submission: Higher OAA recipients who have not received Normal OAA before, and Normal DA recipients aged 65 or above
郵遞提交申請：從未領取普通高齡津貼的現有高額高齡津貼受惠人，及年滿65歲的現有普通傷殘津貼受惠人
 3. application to Social Welfare Department's social security field units: new applicants
向社會福利署的社會保障辦事處提交申請：新申請人

FINANCIAL IMPLICATION (ADDITIONAL ALLOWANCE PAYMENT)

財政影響 (額外津貼開支)

- 2012-13: **\$6.2 billion** (in full-year terms)
 62億元 (若以整年計算)
 - a **14%** increase in recurrent Government expenditure on welfare
政府經常福利開支增加**14%**
 - a **2.3%** increase in total recurrent Government expenditure
政府經常總開支增加**2.3%**
 - recurrent Government expenditure on welfare as percentage of total recurrent Government expenditure to increase from **16.7%** to **18.6%**
政府經常福利開支佔政府經常總開支的比例，由**16.7%**躍升至**18.6%**
 - **0.3%** of Gross Domestic Product
佔本地生產總值**0.3%**

- 2013-14: **\$6.4 billion**
 64億元

- 2022-23: **\$9.6 billion** (more than **50%** increase in 10 years since 2012-13)
 96億元 (自2012-13起十年內增加超過**5成**)

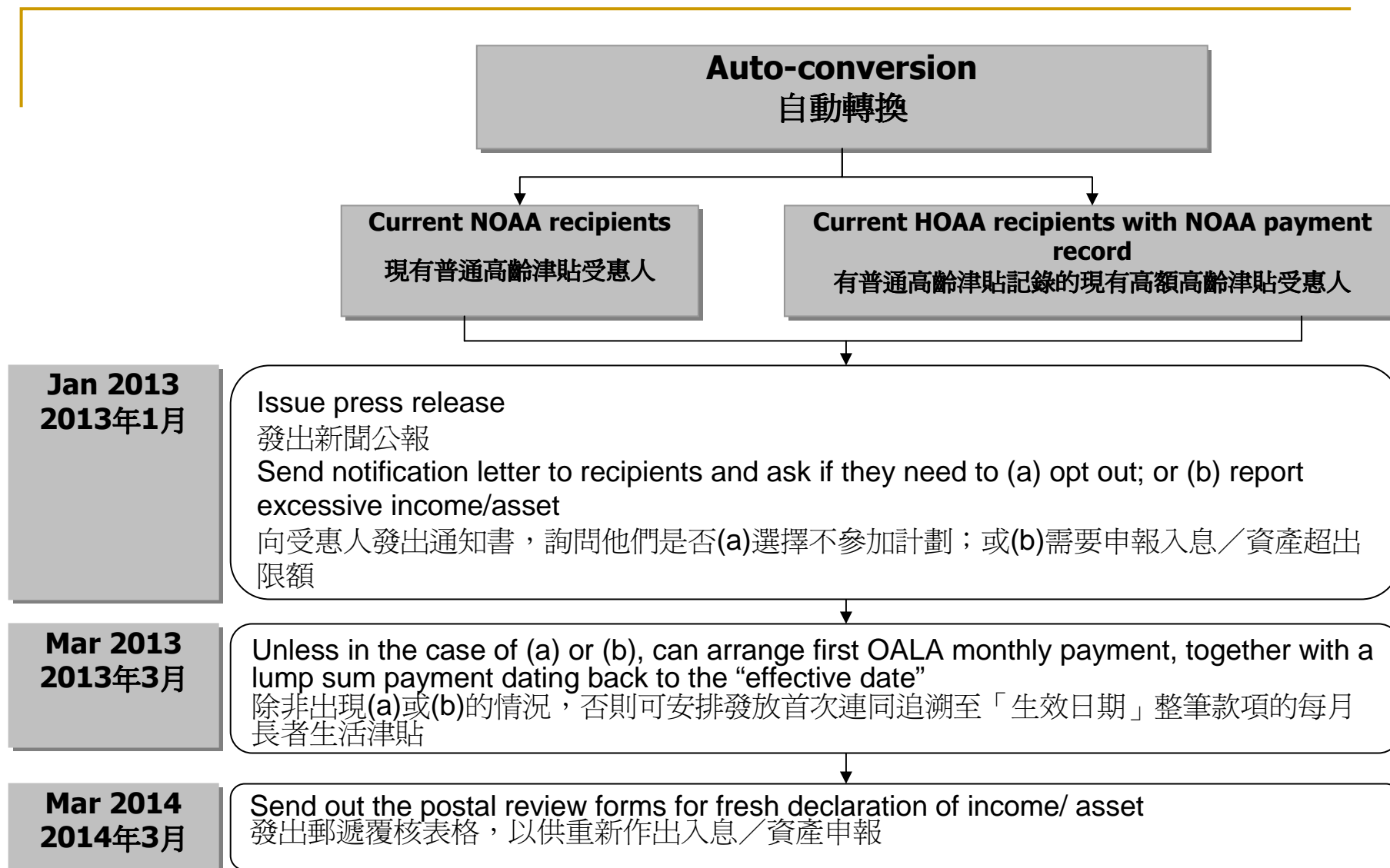
FINANCIAL IMPLICATION (ADDITIONAL ALLOWANCE PAYMENT) (Cont'd)

財政影響 (額外津貼開支) (續)

Year 年份	Estimated No. of elders aged ≥70 年滿70歲長者 預計人數	Estimated No. of elders aged ≥65 年滿65歲長 者預計人數	Estimated additional allowance payment 預計額外津貼開支		
			Government's proposal 政府建議方案 (a)	No need for means declaration for elders aged ≥70 年滿70歲長者無需 申報經濟狀況 (與 (a) 比較)	No need for means declaration for elders aged ≥65 年滿65歲長者無需 申報經濟狀況 (與 (a) 比較)
2012	720 000	980 000	\$6.2B (in full-year terms) 62億元 (若以整年計算)	\$9.9B (+\$3.7B/+60%) 99億元 (+37億元/+60%)	\$13.6B (+\$7.4B/+119%) 136億元 (+74億元/+119%)
2017	800 000	1 210 000	\$7.7B 77億元	\$11.8B (+\$4.1B/+53%) 118億元 (+41億元/+53%)	\$16.8B (+\$9.1B/+118%) 168億元 (+91億元/+118%)
2022	1 010 000	1 520 000	\$9.6B 96億元	\$14.6B (+\$5B/+52%) 146億元 (+50億元/+52%)	\$21B (+\$11.4B/+119%) 210億元 (+114億元/+119%)

PROPOSED WORKFLOW OF HANDLING OALA APPLICATIONS AND REVIEW

處理長者生活津貼申請及
覆核的擬議工作流程



Application through postal submission

以郵寄方式提交的申請

**Current HOAA recipients without NOAA payment record
and current NDA recipients aged 65 or above**

沒有普通高齡津貼記錄的現有高額高齡津貼受惠人，及年滿65歲現有普通傷殘津貼受惠人

**Feb 2013
2013年2月**

Send letter to recipients, inviting them to apply through postal submission
向受惠人發信，邀請他們以郵遞方式提交申請

**Mar 2013
2013年3月**

Start receiving postal submissions with income/asset declaration

開始接受作出入息/資產申報的郵遞申請

If meeting the OALA requirements, arrange first OALA monthly payment, together with a lump sum payment dating back to the "effective date"

如符合長者生活津貼的規定，安排發放首次連同追溯至「生效日期」整筆款項的每月長者生活津貼

**Dec 2013
2013年12月**

Deadline for applying for lump sum OALA payment dating back to the "effective date"
申請追溯至「生效日期」的長者生活津貼整筆款項的限期屆滿

Application to SWD's Social Security Field Units (SSFUs)
向社署社會保障辦事處提交的申請

Current CSSA recipients
現有綜援受助人

Former SSA/CSSA recipients
前公共福利金受惠人/
綜援受助人

New Applicants
新申請人

Mar 2013
2013年3月

Start receiving applications

開始接受申請

Applicants can apply directly to SWD's SSFUs by fax/e-mail/post, through referral or in person

申請人可親自前往社署的社會保障辦事處，或以傳真、電郵、郵遞或透過轉介方式遞交申請

If meeting the OALA requirements, arrange first OALA monthly payment, together with a lump sum payment dating back to the "effective date"

如符合長者生活津貼的規定，安排發放首次連同追溯至「生效日期」整筆款項的每月長者生活津貼

Dec 2013
2013年12月

Deadline for applying for lump sum OALA payment dating back to the "effective date"

申請追溯至「生效日期」的長者生活津貼整筆款項的限期屆滿