100 年委託研究報告

電視事業（含無線、衛星及有線）上下游產業現況質、量化調查研究案

（中英文精簡版）

計畫委託機關：國家通訊傳播委員會

中華民國 100 年 12 月

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受委託單位

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中華民國 100 年 12 月

第一章 研究背景與目的

因應數位媒體的發展，過去涇渭分明的媒介界線日益模糊。受數位化匯流趨勢影響，服務提供者得透過同一傳輸平台提供多樣化服務（包括語音、數據與影音內容等），並使產業結構朝向水平式的發展。有鑒於電視數位化已成為必然趨勢，為掌握產業發展趨勢及方向，研析數位化後之產業變遷，探討我國電視數位化發展對產業經營的影響，國家通訊傳播委員會為掌握電視產業現況、發展趨勢與需求因而透過此案進行電視產業調查，為本案研究背景之緣起。

本案研究目的為透過確立電視上下游產業鏈，並進而進行基礎研究調查，透過專家座談與調查結果繼而建立相關統計調查操作型定義，以做為建置產業資料庫之基礎，相關目的說明如下。

(一) 分析我國電視產業之整體產業鏈與關聯產業，據以確立電視產業調查範圍以及產值推估之參考基礎。

(二) 透過電視產業基礎資料調查及連續資料掌握，藉以掌握電視產業發展軌跡及產業結構，以利後續趨勢研究。

(三) 檢視歷次調查資料，建立電視產業之調查統計機制，包括：產業範疇、調查對象及調查項目之操作型定義及調查方法設計，並提出產業資料庫建置規劃建議，以作為長期觀察產業趨勢之平台。

(四) 提出在數位化發展之下，產業版塊變遷及對整體電視產業經營之影響，並據以提出相關政策建議。

(五) 綜合電視產業調查統計分析與整體電視產業經濟產值，據以提出我國產業現況分析、趨勢預測、競爭態勢（SWOT），進而研擬相關政策及具體建議。

第二章 無線電視產業調查結果分析

99 年度無線電視事業共 5 家業者，調查結果分析如下所示：

一. 經營績效部份，總資產計 305.7 億元，總負債為 110.7 億元，資金來源比例以本國營利企業投資為最多，占總數之 25.0%。

二. 員工數量部份，總員工數為 2,995 人，男女比例約為六成五比三成五；員工學歷以大學居多，占 57.2%；平均年齡為 39.4 歲，平均年薪為 65.7 萬元，平均年資為 9.5 年，每日平均工時為 8.1 小時。

三. 營收狀況部份，總營收為 103.3 億元，營收結構以廣告收入為最多，占 56.1%；未來三年營收預估 100 年會有微幅下跌，爾後呈現成長趨勢。支出狀況部份，總支出為 101.7 億元，支出結構以節目為最多，占 36.6%；未來三年支出預估逐年成長。

四. 硬體設備部份，可拍攝 HD 之攝影棚增為 8 間、數位訊號套數為 84 套。

五. 數位化推動部份，硬體設施包括數位繪圖硬體設備、視訊訊號切割器等，而發展數位電視之困境包括：1. 廣告量持續下滑之下，對於數位電視各項投資有困難；2. 無線數位電視轉換的推廣與教育不足；3. 收視率調查以有線電視收視狀況為基礎。

六. 無線電視之節目製作部份，製作方式以自製為主，共 28,785.5 小時，其成本為 14.1 億元，影片格式以 SD 產出為最多，共 28,469.2 小時。節目購買部份，總購買時數為 3,025.6 小時，金額為 2.4 億元；購買來源以中國為最多，占 34.4%；購買類型以戲劇類為最多，占 63.5%。

七. 播出情形部份，節目總產出時數共 44,551.4 小時，節目類型以新聞類為主；國語節目為最主要節目製作語言；而以戲劇類及非戲劇類節目之銷售時數及

金額最多。

八. 收視率部分，平均收視率為 0.50，以新聞及政令宣導節目為最高。而在節目銷售部份，共銷售 8,150.0 小時，金額合計 3.3 億元；銷售地區以中國為最多，共 1.2 億元。

九. 產業發展困境包括：1. 數位節目缺乏收視調查資料、製播設備昂貴、人員流動性高；2. 有線電視區塊劃分，使無線電視收視群眾逐漸流失；3. 境內、境外網路盜版節目盛行、數位電視收視人口成長緩慢。

十. 購片費談判部分，主要片源為歐美國家則平均 2 年可播出 4-6 次、大陸則約 1 年 2 次。且購片是一種供需的問題，越熱門的節目，所買到的價錢越高、播放時限越短，且華文地區買片價格因受限於語言限制因而購買費用較低。

十一. 廣告破口按法令為半個小時 2 次、45 分鐘 3 次，但實際廣告破口數量、時數與時段則依策略調整，尤以八點檔戲劇常依競爭者收視率而調整，一般來說以長期觀察收視戶收視習慣為廣告開口策略依據。

第三章 衛星節目供應產業調查結果分析

99 年度衛星節目供應者共 109 家業者，調查結果分析如下所示：

一. 經營績效部份，總資產計 11,283.7 億元，總負債為 6,211.7 億元，資金來源比例以本國個人投資為最多，占總數之 57.3%。

二. 員工數量部份，總員工數為 6,277 人，女性員工略高於男性；員工學歷以大學居多，占 49.9%；平均年齡為 34.3 歲，平均年薪為 56.6 萬元，平均年資為 4.2 年，每日平均工時為 8.1 小時。

三. 營收狀況部份，總營收為 456.7 億元，營收結構以其他為最多，占 36.1%；未來三年營收預估呈現逐年成長趨勢。支出狀況部份，總支出為 264.5 億元，支出結構以節目為最多，占 43.8%；未來三年支出預估逐年成長。

四. 硬體設備部份，可拍攝 HD 之攝影棚增為 50 間、數位訊號套數為 195 套。

五. 數位化推動部份，硬體設施包括 HD 相關製播設備、非線性剪輯系統等，而發展數位電視之困境包括：1. 數位化設備費用昂貴，全面的數位化成本太高；2. 衛星平台頻道取得困難；3. 數位檔案規格與傳輸之標準整合度不足；4. 相關單位對於新媒體的重視與補助不如傳統媒體。

六. 發展困境包括：1. 類比頻道頻寬有限，頻道拓展普及率並不容易；2. 頻道租賃上架費用過高；市場太小，廣告效益不足；3. 政府對傳播環境政策無長期明確目標及方向。

七. 節目供應業者之節目製作部份，製作方式以自製為最多，共 585,787.9 小時，其成本為 1,412.5 億元，影片格式以類比產出為最多，共 362,191.7 小時。節目購買部份，總購買時數為 231,389.7 小時，金額為 93.8 億元；購買來源以本國為最多，占 27.7%；購買類型以非戲劇類為最多，占 48.2%。

八. 播出情形部份，以重播為最多，占 62.9%，節目類型以非戲劇類為主；國語節目為最主要節目製作語言。

九. 收視率部分，平均收視率為 0.22，以非戲劇類為最高。而在節目銷售部份，共銷售 43,749.0 小時，金額合計 13.7 億元；銷售地區以美國為最多，共 6.5 億元。

十. 購片費談判部分，國內電視市場規模小，故業者多仰賴購片，而在同業競爭密度高之狀況下，購片費用相對提高，但此為市場競爭自然演化之機制，故主管機關亦難以對此現象進行相關管制，同業間也較難建立共同肯認的競爭秩序。另韓劇之採購較為單純，因其銷售方式和台灣類似，並非透過代理仲介商，故哄抬狀況較小，且素質也較為穩定;而和大陸購片最主要是交易問題，需較為注意。

十一. 廣告破口部分，國內目前的廣告破口為一個小時四段，若單以業務單位立場必然希望廣告開口數增加，因廣口破口時的第一支廣告往往效益較高、收視觀眾流失較少，故販售金額也較高，故破口數越多則所帶來之經濟效益也越高。若競爭激烈之時段，約破 4 到 5 口，相對競爭較弱之處，約破 3 或 4 口，節目收視率較高之節目，其廣告經濟效益高、但秒數也會縮短。

第四章 有線電視系統產業調查結果分析

99 年度有線電視系統經營者共 62 家業者，調查結果分析如下所示：

一、在經營地區分佈上，除了五都行政區與人口數較多之桃園縣外，其餘地區皆僅有 1 家至 2 家之業者，可知地區有線電視系統業者壟斷與集中化情形仍高。

二、用戶總數部分，為 5,375,462 戶，而數位訊號用戶總數則為 158,720 戶。

三、基本頻道收視費平均為 530.6 元，而網路涵蓋率部分，則平均為 87.4%。

四、經營績效部份，總資產計 200.8 億元，總負債為 75.5 億元，資金來源比例以本國個人投資及本國營利企業投資為最多，各占總數之 32.9%。

五、員工數量部份，總員工數為 5,451 人，男女比例大約為六比四；員工學歷以高中（職）以下居多，占 42.0%；平均年齡為 37.3 歲，平均年薪為 44.8 萬元，平均年資為 7.4 年，每日平均工時為 8.0 小時。

六、營收狀況部份，總營收為 515.6 億元，營收結構以訂戶收視業務收入為最多，占 84.3%；未來三年營收預估至 102 年會出現下滑；訂戶收視費組成結構以基本頻道收視費為主，占 99.8%。支出狀況部份，總支出為 348.0 億元，支出結構以節目為最多，占 54.8%。

七、數位化推動部份，硬體設施包括 DTV 數位頭端系統平台、非數位頭端壓縮及傳輸設備等，而發展數位電視之困境包括：1. 主管機關就有線電視數位化之相關配套措施不完善；2. 一般民眾對於數位化認知程度不足；3. 本土華文高畫質數位內容不足。

八、發展困境包括：1. 對中華電信 MOD 規範，與當初設計顯有不同，不公平競爭愈加嚴重；2. 執照審查應加速/簡化審議程序，放寬審查之標準。

第五章 直播衛星服務產業調查結果分析

99 年度直播衛星服務經營者共 9 家業者，各類型調查結果分析如下所示：

一、在總訂戶數部分，為 10,407 戶，而在基本頻道平均收費部分，為 375.0 元。

二、經營績效部份，總資產計 83.3 億元，總負債為 13.8 億元，資金來源比例以本國個人投資為最多，占總數之 76.5%。

三、員工數量部份，總員工數為 183 人，男女比例大致相同；員工學歷以大學居多，占 70.2%；平均年齡為 36.6 歲，平均年薪為 44.5 萬元，平均年資為 4.2 年，每日平均工時為 8.0 小時。

四、營收狀況部份，總營收為 14.3 億元，營收結構以訂戶收視業務收入為最多，占 39.4%；未來三年營收預估呈現逐年成長趨勢；訂戶收視費組成結構以基本頻道收視費為主，占 97.2%。支出狀況部份，總支出為 20.5 億元，支出結構以其他為最多，占 64.6%。

五、數位化推動部份，硬體設施包括整合視訊匣道器、數位壓縮設備等，而發展數位電視之困境包括：1. 台灣有線電視普及率太高；2. 購買頻道成本太高，收視戶仍然以有線電視類為主。

六、發展困境包括：1. 電視廣告市場萎縮； 2. 非法 IP-TV 業者盜用衛星訊號；3. 數位機上盒之操作對年長者較不易操作。

第六章 IPTV 服務產業調查結果分析

一、99 年度 IPTV 業者僅計中華電信 MOD 一家，頻道總數為 126 個。

二、經營績效部份，總資產計 4,543.1 億元，總負債為 857.1 億元，資金來源比例以政府機構為最多，占總數之 36.8%。

三、員工數量部份，總員工數為 8,164 人，其中負責電視事業者占 123 人，男性與女性之比約為七比三；員工學歷以高中（職）以下居多，占 32.8%；平均年齡為 46.8 歲，平均年資為 23.2 年。

四、營收狀況部份，總營收為 10.3 億元，營收結構以訂戶收視業務收入為最多，占 78.3%；訂戶收視費組成結構以基本頻道收視費為主，占 63.0%。

五、支出狀況部份，總支出為 37.7 億元，支出結構以硬體為最多，占 46.5%。

六、數位化推動部份，硬體設施包括網路設備、傳輸設備等，而發展數位電視之困境包括：1. 在 MOD 上架之無線電視頻道要求覆蓋特定時段節目

七、發展困境包括：1. 受到有線電視 MSO 聯合抵制，有線電視頻道難以上架 MOD 平台。

第七章 質化研究結果

質化研究共分為深度訪談與焦點座談兩部分，共歸納出八個重要議題，分別討論如下：

一、建置數位內容雲端、開闊觸達通道

目前已是數位多平台時代，故所製作內容已不侷限在有線、無線與衛星等平台上被收視，而是有許多觀眾是透過新興數位平台作為收視媒介，因此如何建置數位內容雲端，強化電視產業上中下游間之串連性，發展出可獲利的商業營運模式，為未來主管機關與電視產業相關業者共同著力之面向，本研究於雲端概念之資料蒐集可大致歸納為二，如下：

(一) 中國市場廣、視頻授權金增加收益

近年來中國大陸視頻網站逐漸引起熱潮，國內民眾也紛紛成為其收視眾，特別是居住在外的年輕族群，漸漸以網際網路作為節目收視之最重要媒介，具廣大市場。另中國大陸由於顧及 WTO 此種經濟制裁危機之影響，故版權問題近年來亦漸漸被重視，在此背景下，反而為我國節目供應業者與節目內容業者帶來龐大商機，可藉視頻授權金增加收益。

(二) 國內投入研究數位內容雲端趨勢

由於雲端服務為未來發展之重要趨勢，故數位內容亦將以此為基礎進行規劃，故國內大型電信與系統業者亦紛紛投入研究數位內容的雲端平台。除此之外，由國內外 32 家企業組成的「雲端暨聯網電視聯盟」(Cloud & Connect TV Forum；CCTF)也已經正式成立，結合有線電視、硬體、內容和平台業者，推動數位電視上中下游產業鏈之整合，強化與進入雲端與數位匯流的中華電信競爭。

二、邁向聯網電視時代、研發應用程式

大部分業者皆認為聯網電視為數位匯流發展下必定到來的趨勢，其應如同電視產業之後花園，發展頻道以外的加值運用，像是線上付款、醫療看護、KOD等都是未來考量發展之服務，但各項服務推出前應詳細考量消費者之需求，詳細洞察其生活型態，開創另外的獲利模式，為電視台未來應可著力的未來發展方向。

三、宣導無線全數位化、強化配套措施

2012 為台灣之數位元年，無線電視將關閉類比訊號全面數位化，但大部分業者皆對明年數位元年之推廣抱持較不樂觀之看法，其主因大多認為目前宣導效益不足，故民眾認知度較低，不知數位化意涵與收看高畫質電視之條件為何，可能會造成數位化時程延宕。尤其是對於弱勢團體來說，對數位化概念薄弱，且依賴電視時數較高，故類比訊號關閉後可能造成近用無線電視媒體之障礙。

除宣導效益尚待改善外，因電視機本身產品使用生命週期較長，因此有業者表示阻礙數位化發展最大之因素為「收視終端不符規格」，即收端普及率及發展成熟度較低，因在發射端部分成熟度已甚高，部分業者認為電視數位化在國內可能需要約 3 至 5 年後才具有明顯效果。

四、發展電視節目格式、引領創意風潮

台灣素以創意為重，政府亦將文化創意產業列為重要施政，許多業者受訪時亦強調，台灣目前在亞洲與華語地區唯一可競爭的條件就是創意。據本研究所得，目前已有若干電視業者輸出電視格式到中國大陸，並獲得具體之效益。

另也有業者表示國內節目電視節目的確會引起部分海外國家興趣，但在電視節目格式輸出的過程中所遭遇到最大的問題，是無法將整套電視節目格式變成一個可賣之商品，因業者無多餘人力資源重新編寫電視節目格式之規格化流程，人力成本會高於獲利，故多選擇以合資之方式進行輸出。

有鑑於此，建議政府可協助此種電視節目格式之規格化輸出，讓電視節目製作業者專注於節目創意之發想，而在規格化部份則有專人協助，並加入著作權之概念於編寫電視節目格式規格化流程之中，以提高電視節目格式輸出之可能性。

五、開放商業置入行銷、豐富製作資源

多數業者認為目前我國電視政策對於置入性行銷法令定義與實際電視產業實際運作有所落差。因法令與業界狀況不符合，故易造成我國電視產業製作成本無法提高、節目品質下降，失去國際市場競爭力等問題。

置入性行銷的基本精神之一為「尊重編輯自主」，在不過份渲染產品之狀況下，可允許適度之開放，但新聞與兒童節目需排除在開放範圍之外。除此之外，在資訊爆炸、媒體俯拾即是之時代，閱聽人主動選擇權強化，開放節目置入性行銷後，若置入方式不自然、違背製作倫理與美學，亦終究會被市場機制所淘汰。

六、壯大公共廣播電視、激勵優質節目

公共廣電若能獲得更多資源的挹注，將能帶頭發展優質的數位內容，與商業電視形成良性競合關係，亦能補足許多商業電視所不願關注的內容領域。惟政府所有的輔導與決議程序略慢，其中特別是輔導部分，公視與商業電視台之出發點有所差異，故在輔導之面向應有所區分，不應立於同一基準點作比較。

欲振興影視產業，政府必定需大力投資，投注資源培養各項軟硬體設備，因此必須要有一個負責的組織單位，而許多成功發展影視產產業的國家皆是以當地之公共電視為中心，例如韓國在 2000 年開始擴展影視事業之後，即是以 KBS 為中心，其他商業電視台則跟著 KBS 之腳步，去培育所有韓劇國際化的相關計畫。

七、凝聚數位發展共識、打通有線瓶頸

數位化推動部分，部分有線電視業者認為驅動全面數位化之關鍵因素如下：

(一) 強制收回類比頻道(包括無線及有線)以全面平台數位化，且以較高費

率鼓勵業者投資及發展數位化平台。透過強制收回類比頻道以迫使頻道供應者全面提供數位化頻道內容、頻道代理商亦進而向頻道供應商爭取數位化頻道內容授權，避免頻道供應壟斷，促進頻道內容豐富化及全面數位化。而政府透過調高數位化收視費率，促使各平台上、下游(頻道及平台業者)更有利基，進而樂於發展數位化頻道內容及平台技術。

(二) 提出具體獎勵及補助措施，例如可採行減輕稅負、補助機上盒、釋出公用寬頻管道或配合政府科專等措施，鼓勵及補助頻道供應者製作優質的數位化頻道內容以及發展各種數位化平台技術與應用，帶動電視產業鏈各環節正向發展。

另有線電視業者數位化遭遇到最主要的困難可能有數位內容供應取得不易，法規定義、標準、平台規範、內容管理機制等不統一、明確。

而就頻道業者來說其數位化推動阻礙如下：

(一) 觀眾收視規格不一：目前收視規格分為16:9與4:3，但收視規格不一的問題目前並無有效解決之道，目前大多數觀眾還是看SD的東西，此部份就是困擾業者與收視眾最大的問題之一。

(二) 無實際經濟效益：業者進行數位化後，系統大部分無法上架，因為有些系統沒有頻寬，HD排不進去，或者對於系統業者來講，給其HD的頻道並無意義，因並無法收費。

除此之外，系統業者普遍主張應讓市場自行走向分組付費機制，並以此一機制若推動不當，可能嚴重傷害內容業者提出警示。內容業者對此一機制則存在不同想像，並對自身可能的處境有所擔憂，但學者對此機制則站在消費者主權的立場予以支持。目前分組付費之概念在國內較難實踐之原因可能如下：（1）數位化程度不足；（2）分組付費之收視率調查機制未明朗化。

一直以來，國內收視率調查機制呈現近乎壟斷之狀態，故結果常遭人質疑，目前台灣有線寬頻產業協會（CBIT）提出成立一個收視率調查機構之概念，其由各 MSO 業者合作建立，因業者所提供之機上盒可記錄消費者所有收視行為，較現今市場主流之收視率調查方式更加仔細與精確，另也提供廣告業更好的決策工具，但在推動過程中可能受個人資料保護法制約，將造成一定障礙，故主管機關宜協調相關機關合理排除可能涉及之限制。

八、成立影視發展基金、推動數位內容

部分業者提到新聞局現行的高畫質節目補助措施已出現問題，不符所需，宜建立穩定、專業而獨立的影視發展基金，進而從事數位內容的推動事宜。而此一基金需具足夠規模，除可在一定條件下投資、補助影視內容外，其重要任務包括人才訓練、市場研究及國際行銷協助等。

另隨著數位化程度越來越高，應運而生的是對數位內容之需求，但目前國內普遍較優質之高畫質內容皆以國外採購為主、本土化自製內容甚少，但實際上數位內容之發展才是讓整體數位匯流產業蓬勃發展、挹注上下游產業鏈動能之重要關鍵，並進一步以優質的數位內容吸引終端用戶採用數位服務。

第八章 新興視訊媒體平台環境尖兵－聯網電視

新媒體未來發展的三大重點方向將是以資訊化（IP）、行動化（Mobile）、以及個人化（Consumer-centric）為主，而目前是以網路電視的發展較具雛形。數位新媒體的使用者不再只是透過機上盒接收內容，還可以延伸到各式各樣連網或離線的環境中，定位在「新的連結式消費者」（new connected consumers）立場上。未來數位新媒體產業須要平衡各種不同發展中的技術標準與創新服務，以便滿足消費者隨時隨地在不同的環境下接收服務與內容的需求。

網路與電視的結合，亦即俗稱的「網路電視」，又可分為將電視節目送上網路，以及藉由電視螢幕瀏覽網頁兩大類應用。前者，即電視節目上網，是屬於平台業者的加值應用，即俗稱的「IPTV」；後者，是將電視機連結上 IP 網路，則是以消費者為主的應用形態。

聯網電視係由數位廣電媒體的角度來探討新興視訊媒體（數位電視：數位無線電視、數位有線電視、衛星電視；IPTV；WebTV；SmartTV）平台環境的發展。與資通訊匯流後，數位電視廣播系統的應用變得相當廣泛：能夠實現多頻道電視、高畫質電視與手持式行動電視；在節目的展現上能夠由傳統線性節目演進到非線性節目的製播方式；而新的應用則可朝向個人電視、網路電視、互動式電視、以及社群/參與式電視的方向發展。

聯網電視未來發展，是以網路情境為主，匯流之後不論由網路環境來看或是由傳統媒體前瞻角度來看，其未來演化的趨勢應是一致的。聯網電視終端兼具傳媒訊號的接收與網路連結的雙重功能，例如複合式寬頻電視(HBB)。另外在無線通訊多媒體終端設備中，類似智能手機電視機型，亦是屬於這一類整合性複合式的無線終端。這些連結式的媒體終端設備，是促成連結式消費者視訊媒體平台應用環境的重大功臣。另聯網電視終端的多樣性與娛樂性功能，例如更高畫質的展現、3D 虛擬實境的應用、身歷其境的互動等，亦會帶動新一波的媒體在網路上應用的發展。因此連結式的媒體終端設備因傳播媒體的加入，而衍生出更多樣化的聯網電視的應用情境。

聯網電視產業秩序與相關法規仍有待建立。這些問題包括聯網電視的數位內容版權法、個資保護法、聯網電視產業結構與營運、以及相關的工程技術與系統等，都有待解決。聯網電視終端設備上的新應用與功能，將伴隨著聯網電視的發展而逐步拓展。

第九章 電視產業資料庫規劃與建置建議

電視產業資料庫未來將以年度統計調查結果為基礎，試圖呈現跨年度且連續性之產業資料庫。此外，亦將整合通傳會內既有不同資料庫，透過跨資料庫檢索及運算功能，提供具有產業檢索與監理功能之多工資料庫。

有關資料庫內容的部分，主要以主管機關執行業務所需之各項需求為主，資料來源則分別包括，透過年度基礎產業統計調查以及各類業者(包括平台與頻道業者)依據不同表單進行上傳。其中，有關透過調查取得資料部分宜透過年度性產業普查來進行；而由業者依據既有資料庫系統進行資料填報者，宜先就相關調查項目進行統一定義以確保統計基準一致。並以最近五年調查資料建立完整跨年度之時間序列產業資料庫，作為存取分析及未來資料庫擴充之基礎。

由於各處業務之差異，故調查對象、資料蒐集方式、資料結果亦有所不同，因此整合會內各處需求，並釐清各項業務與調查對象之範籌與定義為規劃資料庫初期首要之務，如此才可強化會內資訊之一致性，建立各處間之共識，實際達到整資源之目的。

除此之外，歷年來會內已累計大量且豐富調查結果、業務相關統計與資料庫等資料，故應**系統性、規格化地彙整過往資源，強化資訊互通之效能。另**目前會內資料項目龐雜，故建議各處應進一步檢視業務需求，精簡既有項目，刪除過於老舊或是毋須再使用之項目，以利後續資料整理並提高業者自行填報之意願。

另資料庫部分資料之蒐集來源為業者提供，惟部分資訊涉及營業機密資訊，故建議未來應採業者自行定時填報，以提昇資料回收之效率、縮短行政流程，但目前除申照與換照時業者有責任與義務需交付營運計畫書外，主動填報意願較低。建議未來應將業者營運資料自行上傳義務納入法規與規範罰則始有強制約束力，另也可確保資料來源充實，進而產生資料庫效益，以提供具高系統性的電視產業資料蒐集、整理與檢索功能，作為往後執行監理管制或政策規劃之依據。

第十章 廣播電視產業投入產出關聯分析

一、99 年廣播電視產業總營收為 11,373,481.2 萬元，而其營收所創造之市場總產值為 7,052,690.5 萬元；廣播電視產業之投入產出乘數部分為 0.22；在總產值的創造效果部分，廣播電視服務業最終需要增加每億元，將使體系的總產值額外提升 3.982 億的幅度，相對於其他產業部門，其排序位於第 23 位，但若將服務業獨立出來討論，針對 13 個服務部門討論，發現廣播電視產業的排序位於第 2 位，排名相當前面，代表廣播電視產業在服務業中具有相當重要的地位。

二、在附加價值的創造效果部分，廣播電視服務業最終需要增加每億元，將使體系的附加價值額外提升 2.41 億的幅度，相對於其他產業部門，其排序位於第 31 位，但若將服務業獨立出來，針對 13 個服務部門討論，發現廣播電視產業的排序位於第 2 位，排名相當前面。

三、在勞動報酬的創造效果部分，廣播電視服務業最終需要增加每億元，將使體系的勞動報酬額外提升 0.92 億元之幅度，相對於其他產業部門，其排序位於第 19 位，但若將服務業獨立出來，針對 13 個服務部門討論，發現廣播電視產業的排序位於第 12 位，排名略低。

第十一章 結論與建議

目前國內電視產業 SWOT 分析如下：

一、優勢：

(一) 硬體產製技術成熟，科技業具國際高度競爭力

(二) 創意人才輩出，提高電視格式輸出可能性

(三) 國內網路、終端普及率高，有助平台匯流發展

二、劣勢

(一) 數位化程度不足，政府數位政策期程不明確

(二) 國內市場較小且競爭程度不足

(三) 節目自製程度低、重播頻率高

(四) 壟斷性收視率調查影響產業發展動態

(五) 閱聽人收看電視時間減少

三、機會

(一) 政策驅動新視迅產業成為第七大新興產業

(二) 視頻網站重視版權銷售

(三) 華語市場廣大，強化文化輸出動能

四、威脅

(一) 盜版猖獗，影音網站分食市場

(二) 中國市場崛起，吸納國內相關資源

(三) 國際競爭壓力漸強

相關建議事項討論如下：

一、立即可行之建議

(一) 整合會內各處資源及需求、活化電視產業資料庫之效能：整合會內各處需求，並釐清各項業務與調查對象之範籌與定義，並視業務需求，精簡既有項目，刪除過於老舊或是毋須再使用之項目。另應系統性、規格化地彙整既有過往資源，強化資訊互通效能。

(二) 數位化觀念宣導：數位化對電視產業之改變應為「有感」，讓民眾瞭解數位化推動後對收視品質、形式之改變與好處，特別是內容部分應要有差異化服務。

二、中長期性建議

(一) 電視產業人才培育、厚植基礎實力：建議相關主管機關應培養精於數位版權授權、國際行銷、跨平台銷售的專業人員，提高我國電視產業的競爭力。

(二) 主管機關擔負規管、扶植責任：主管機關應明確規範管制標準，界定市場的「壟斷」，以避免爭議並提供業界足資依循的清楚方向。其次，管制標準應符合台灣社會環境需求及產業發展脈絡，而非單純移植歐洲或日本、美國的規定。在扶植部分，可借鏡經濟部過去輔導電子產業之經驗，就台灣電視產業之特性，著力發展此一領域的「雲」與數位節目內容。

(三) 透過法規引導良性競爭格局、強化市場競爭密度：逐步開放市場，放寬法規限制，減少各平台之管制差異，積極協助各平台能公平取得頻道內容供應，有效達成頻道無歧視原則。

(四) 檢視置入性行銷規範：新聞與兒童節目類型以外的節目可較低管制地開放置入性行銷。惟政府需做好相關規範，並明確訂立節目廣告化之規則。

(五) 扶植數位內容產業、擬定明確數位化進程：建議政府應明定數位化時程，若業者可如期完成，則可鬆綁費率規範，提高收視費上限。另推動數位化最直接獲利者為設備製造商，是否有相關配套措施，例如從營收中抽出部分比例作為推動數位化之用，以健全整體產業發展。

2011 Consignment Proposal

A Quantitative and Qualitative Study on TV Industry Chain (Terrestrial TV, Satellite TV, and Cable TV)(The Abridged Version)

Consignment Organization：National Communications Commission

December, 2011

Chapter 1 Background and Purpose

In response to the development of digital media, the media boundaries over the past gradually disappear. Because of the trend of digitization convergence, service providers have to provide variety services through the same transmission platforms (including voice, data, video content, etc.), and the industrial structure develops horizontally. TV digitization has become an inevitable trend; as a result, in order to understand industry development trends and directions and to analyze the industry changes after digitization, the impact of digitization on the industry operation is discussed. NCC does this TV industry research to realize the status, development trend, and demands of TV industry.

The research purposes of this study are that giving the basic research through confirming TV industry chain relationship, and that establishing the operational definition of related statistical survey through experts forums and research results, in order to building the industry database. Following are the purpose illustration.

I. To analyze the industrial chain and related industries of Taiwan's TV industry, and to ascertain the scope of investigation as well as to establish the reference of output value estimate.

II. Through the basic information survey and continuous data collection, to know the development and structure of TV industry and to facilitate the following researches.

III. To check previous survey data and to establish the survey mechanism of TV industry, which including: industry content, the operational definitions of survey objects and items, and survey methodology. Also, to provide suggestion about building the industry database, as a platform for long-term industry trend observation.

IV. Under the digitization development, according to the impact of industry transition and overall TV industry operating, to make relevant policy suggestion.

V. According TV industry analysis and overall TV industry economic output, to propose industry status analysis, trend forecasting, and the competitive situation (SWOT), and then to frame relevant policies and specific proposals

Chapter 2 Analysis of Terrestrial TV Industry

There are five companies in Terrestrial TV industry in 2010, and following are the analysis results of each item:

I. For the performance, the total asset is 30.6 billion, the total liability is 11.1 billion, and the largest percentage of funding is taken by domestic profit-seeking enterprise investment which accounts for 25.0%.

II. For the personnel, the number of personnel is 2,995, 65% for male and 35% for female, and 57.2% of personnel are university degree. The average age is 39.4; the average annual salary is 657 thousand; the average working year is 9.5 years; and the average working hour per day is 8.1 hours.

III. Total revenue is 10.3 billion, 56.1% from advertising revenue; it is forecasted decreasing in 2011 and then increasing in 2012 and 2013. Total cost is 10.2 billion, 36.6% for programs; it is forecasted increases in the next three years.

IV. For the equipment, HD studio is added to 8, and digital signal is added to 84.

V. For the promotion of digitization, the hardware facilities include digital graphics hardware equipment, the video signal cutter, etc. The difficulty for developing digital TV includes: 1. Lack of fund for digital TV; 2. Lack of digital TV promotion; 3. Audience measurement based on cable TV.

VI. The programming of Terrestrial TV is mainly homemade, a total of 28,785.5 hours, and the video format is SD for the most, a total of 28,469.2 hours. For the program purchase, 34.4% is from China, a total of 3,025.6 hours, and 63.5% is for drama.

VII. Total broadcast hours are 44,551.4 hours. Broadcast program type is mainly news, and Mandarin is the main language.

VIII. Average audience measurement is 0.50, and the type of news is the highest. For the program sell, it is totally 8,150.0 hours and 332.7 million, of which 120.3 million is from China.

IX. The difficulty for industry includes: 1. Costliness of production equipment; 2. Loss of Terrestrial TV audience; 3. Internet piracy.

X. For the purchase fee negotiation, films from the United States and Europe usually broadcast 4-6 times for two years averagely, and twice a year from China. The more popular programs, the higher the price to buy and the short time for broadcasting, and the purchase fees are lower in Chinese area because of language restrictions.

XI. Advertising breaks are twice for 30 minutes and 3 times for 45 minutes, according to the regulation. But actually the numbers, times, and intervals of advertising break will be adjusted by strategy, especially for the period of prime-time drama, which adjusted by audience measurement. Generally speaking, the strategy of advertising breaks is according to long-term observation on the habits of audiences.

Chapter 3 Analysis of Television Stations

There are 109 television stations in 2010, and following are the analysis results of each item:

I. For the performance, the total asset is 1,128.4 billion, the total liability is 621.2 billion, and the largest percentage of funding is taken by domestic profit-seeking enterprise investment which accounts for 57.3%.

II. For the personnel, the number of personnel is 6,277, females are slightly more than males, and 49.9% of personnel are university degree. The average age is 34.3; the average annual salary is 566 thousand; the average working year is 4.2 years; and the average working hour per day is 8.1 hours.

III. Total revenue is 45.7 billion, 36.1% from others; and it is forecasted increasing in the next 3 years. Total cost is 26.5 billion, 43.8% for programs; it is also forecasted increasing in the next 3 years.

IV. For the equipment, HD studio is added to 50, and digital signal is added to 195.

V. For the promotion of digitization, the hardware facilities include HD-related production and broadcast equipment, non-linear editing system, etc. The difficulty for developing digital TV includes: 1. High cost of digitization; 2. Difficulty to obtain satellite television service; 3. Lack of integration for digital file format and transmission; 4. Lack of attention and subsidy for new media.

VI. The difficulty for industry includes: 1. Limited bandwidth of analog channel; 2. High cost of channel slotting fees; 3. No clear policy for communication industry.

VII. The programming of television stations is mainly homemade, a total of 585,787.9 hours, and the video format is analog for the most. For the program purchase, 27.7% is from Taiwan, and 48.2% is for non-drama.

VIII. Broadcast programs are 62.9% of replay; program type is mainly non-drama; and

Mandarin is the main language.

IX. Average audience measurement is 0.22, and the type of non-drama is the highest. For the program sell, it is totally 43,749.0 hours and 1,370.1 million, of which 649.7 million is from America.

X. For the purchase fee negotiation, the size of domestic TV market is small, so operators usually purchase from other country. Under the keen competition, the purchase cost of film increases, but it is the natural evolution of the market competition mechanism, so it is difficult to control by the authorities. The purchase of Korean drama is simple, because it is not through an agent, who drives up the price, and the quality of drama is stable. And with China, the most important issue is the transaction problem.

XI. Advertising breaks are four times for an hour. Because the first advertisement has more benefit, the price is higher, so if the breaks are more, the economic benefits increase. In the keen competition period, the breaks are 4 or 5, and 3 or 4 in other periods. The program with high audience measurement has more economic benefits, but the seconds for breaks are shortened.

Chapter 4 Analysis of Cable TV Operators

There are 67 cable TV operators in 2010, and following are the analysis results of each item:

I. For the distribution of the operating region, in addition to five main administrative city and Taoyuan County, there are 1-2 operators in each region. It can be seen the monopoly and high centralized for cable TV operators.

II. The total number of subscribers is 5,375,462, and the number of digital signal subscribers is 158,720.

III. Subscriber fees for basic channel are averagely 530.6 dollars. Average network coverage rate is 87.4%.

IV. For the performance, the total asset is 20.1 billion, the total liability is 7.6 billion, and the largest percentage of funding is taken by domestic personal investment and domestic profit-seeking enterprise investment, each accounting for 32.9%.

V. For the personnel, the number of personnel is 5,451, 60% for male and 40% for female, and 42.0% of personnel are below high school degree. The average age is 37.3; the average annual salary is 448 thousand; the average working year is 7.4 years; and the average working hour per day is 8.0 hours.

VI. Total revenue is 51.6 billion, 84.3% from subscriber fees and 99.8% from basic channel among subscriber fees; total cost is 34.8 billion, 54.8% for programs.

VII. For the promotion of digitization, the hardware facilities include DTV digital headend platforms, non-digital head-end compressed and transmission equipment, etc. The difficulty for developing digital TV includes: 1. Incompleteness of digitization of cable TV; 2. Audiences' insufficient acquaintance with digitization; 3. Lack of domestic HD digital contents.

VIII. The difficulty for industry includes: 1. Different standard with Chunghwa Telecom MOD comes to unfair competition; 2. Simplifying the license review and loosening the review standard.

Chapter 5 Analysis of Satellite TV Operators

There are nine satellite TV operators in 2010, and following are the analysis results of each item:

I. The total number of subscribers is 10,407, and the average subscriber fees for basic channel are 375.0 dollars.

II. For the performance, the total asset is 8.3 billion, the total liability is 1.4 billion, and the largest percentage of funding is taken by domestic personal investment which accounts for 76.5%.

III. For the personnel, the number of personnel is 183, 50% for male and 50% for female, and 70.2% of personnel are university degree. The average age is 36.6; the average annual salary is 445 thousand; the average working year is 4.2 years; and the average working hour per day is 8.0 hours.

IV. Total revenue is 1.4 billion, 39.4% from subscriber fees and 97.2% from basic channel among subscriber fees; and it is forecasted increases in the next three years. Total cost is 2.1 billion, 64.6% for others.

V. For the promotion of digitization, the hardware facilities include integrated video gateway, digital compression equipment, etc. The difficulty for developing digital TV includes: 1. High popularity rate of cable TV; 2. High cost of channel purchase.

VI. The difficulty for industry includes: 1. Advertising revenue decreases; 2. Illegal IP-TV operators; 3. Set-top box is hard to use for old people.

Chapter 6 Analysis of IPTV Operators

I. There is only one IPTV operators (Chunghwa Telecom MOD) in 2010, and it is 126 channels.

II. For the performance, the total asset is 454.3 billion, the total liability is 85.7 billion, and the largest percentage of funding is taken by government which accounts for 36.8%.

III. For the personnel, the number of personnel is 8,164, and 123 persons is for TV career, 70% for male and 30% for female. 32.8% of personnel are below high school degree; the average age is 46.8; and the average working year is 23.2 years.

IV. Total revenue is 1.0 billion, 78.3% from subscriber fees and 63.0% from basic channel among subscriber fees.

V. Total cost is 3.8 billion, 46.5% for hardware.

VI. For the promotion of digitization, the hardware facilities include network equipment, transmission equipment, etc. The difficulty for developing digital TV includes: Terrestrial TVs ask for cover some programs on MOD.

VII. The difficulty for industry includes: Boycotted by cable TV MSO, cable TV channel is hard to slot on MOD.

Chapter 7 Qualitative Analysis

The qualitative research is divided into two parts, interviews and focus forums, and eight issues are inducted as the following:

I. Building digital content cloud

It is the era of digital multi-platform, so production contents are not only received by cable, terrestrial, or satellite, but also by the emerging digital platforms. As a result, how to build digital content cloud, to strengthen the TV industry chain, and to develop a profitable business model, is the direction for the authorities and related operators of TV industry. The data collection of cloud of this study can be concluded to the following two items:

1. Huge Chinese market; Revenue for video license fees increased

In recent years, video sites in China are growing boom, and the domestic audiences gradually change reception way into video sites, especially for youngsters who live outside. Internet becomes their main TV reception medium, and it will be the major market. In addition, because of the economic sanctions of WTO, the copyright has been gradually taken seriously in China recently. Under this background, it will be an opportunity for domestic TV stations and program producers to increase revenues by video license fees.

2. Trend of domestic digital content research

Because the cloud service is the main trend in the future, it is considered to be the foundation of digital contents, and domestic large telecommunication operators and system operators start to research about the cloud platform of digital contents. Besides, the "Cloud & Connect TV Forum (CCTF)"which composed of 32 enterprises is founded officially. It combines cable TV, hardware, contents, and platform operators to integrate digital TV industry chain, in order to strengthen the competition of cloud and digital converge with Chunghwa Telecom.

II. Into the connect TV era, developing applications

Most of the operators consider that the digital convergence will come to Connected TV eventually, and it should develop added services, such as online payment, health care, KOD, etc. However, for the future development, operators should carefully consider about the demands and life styles of consumers and create new profitable business models.

III. Promoting Terrestrial TV digitization

2012 is the first year of Taiwan's digital year, and analog signal of Terrestrial TV will be turned off for entire digitization. But most of the operators hold pessimistic opinion on the first digital year because they think the promotion is not enough. The audience’s knowledge for digitization is low, and they do not know the restriction of HD TV reception, which causes digitization delayed. Especially for disadvantaged groups, they have weak concept of digitization, and their TV reception hours are more, so it might results in obstacles for Terrestrial TV reception.

In addition to promotion efficiency improving, because the television is a durable product, some operators indicate that the biggest obstacle for digitization is “terminal reception specifications not match.” It means the lower maturity in reception and the higher maturity in emission, and operators consider that it should take 3-5 years to make an obviously effect of TV digitization.

IV. Developing program format

The government regards the cultural and creative industry as an important policy implementation, and in interviews, many operators emphasize the only advantage for Taiwan to compete is creativity. According to the data of this study, some TV operators make TV program formats output to China and received concrete benefit.

Some other operators indicate domestic TV programs attract foreign country indeed, but the biggest problem for program formats output is that it is hard to change a program format into a profitable commodity. There is no more human resource for rewriting program formats, and the labor cost is higher than the profit, so operators will choose the way of joint venture.

For this reason, it is suggested that the government can assist with TV program formats output. The TV program producers concentrate on the program creativity, and specialists assist with the specifications and the concept of copyright, to improve the possibility of program formats output.

V. Opening up placement marketing

Most of the operators consider that there is a gap between the definition of placement marketing and the actual operation of TV industry. Because the regulation does not meet the industry conditions, it limits production costs, declines the program quality, and loses competence in international markets.

One of the basic spirits of placement marketing is “respecting editorial independence.” Under the condition of not over propaganda, it could be allowed to open up moderately, but news and children programs should be excluded. In addition, in the era of information explosion and media around, the audiences strengthen their choice rights, so if the way of placement marketing is unnatural, contrary to the ethical and aesthetic production, it will be eliminated by the market mechanism eventually.

VI. Strengthening Taiwan Broadcasting System, encouraging high quality programs

If Taiwan Broadcasting System could get more resources, it will lead to develop high quality digital content, maintain good co-opetition with commercial operators, and complement the contents which not concerned by many commercial operators. However, all counseling and procedures of government is a little slow, especially for the counseling part. The initiation of Taiwan Public Television is different with commercial operators, so there should be a differentiation for consulting.

In order to revitalize the film industry, the government must invest heavily in equipments of software and hardware. As a result, there should be a responsible organization, and many countries with well-developed film industry set their Public Television as the center, for example, Korea set KBS as the center while expanding film and television business in 2000, and other commercial television stations will follow the steps of KBS to cultivate all programs for drama internationalization.

VII. Gathering consensus on the digital development

For digitization promotion, some cable TV operators consider that the key factors to drive digitization are as follows:

1. To countermand compellingly analog channels (including Terrestrial and cable) for all platform digitization, and to encourage operators to invest and develop digital platform by higher subscriber fees. Through countermanding analog channels, channel suppliers must provide digital channels, channel agents will ask channel suppliers for digital channels authorization to avoid shortage of channel supply, and then channel contents will be plentiful and digitization. Moreover, the higher digital subscriber fees make the operators more profitable, which might cause them to develop digital contents and platform technology.
2. To propose specific incentives and subsidization measures, for example, reducing the tax, subsidizing set-top boxes, releasing public broadband channel, etc. Encouraging and subsidizing channel suppliers to produce digital contents and to develop digital platform technology will come to positive development of TV industry chain.

Other cable TV operators mentions the main difficulties for digitization are hard to obtain digital channels and unclear regulations, standards, platforms norms, and management system.

And for TV station operators, the obstacles of digitization promotion are as follows:

1. Different specifications of the audience: The reception specification is divided into 16:9 and 4:3, but there is no effective solution presently. Most audiences watch SD contents, and that is the biggest problem for operators and audiences.
2. No actual economic benefit: After operators digitize, it cannot be put on most systems for insufficient bandwidth. Or for some system operators, it is unmeaning because of no more subscriber fees.

In addition, system operators generally advocate grouped payment mechanism, and they indicate if the mechanism doesn't work well, it could seriously harm the content operators. Content operators have different opinions about the mechanism and worry about their own situation, but scholars support the mechanism from the consumer position. The reasons for grouped payment mechanism working difficultly are as follows: (1) the low degree of digitization, (2) audience measurement of grouped payment mechanism is not clarified.

The domestic audience measurement is almost a monopoly, so the results are often questioned. CBIT proposed a concept of establishing an audience measurement organization, and it is founded by every MSO operators. Because the set-top boxes can record all the reception behaviors, it is more accurate than the main audience measurement in this market, and it provides a better decision tool for advertising companies. But it might be obstructed by Personal Data Protection Law, so the authorities need to eliminate restrictions rationally.

VIII. Establishing film development foundation, promoting digital contents

Parts of the operators mention that there is a problem with the HD program subsidization of Government Information Office. It is not conform to the demands, so the film development foundation which is stable, professional, and independent should be established, in order to promote digital contents and related items. Besides, the foundation should have an enough scale, and it not only invest and subsidize contents at certain conditions, but also does human resource training, market research, international marketing assistance, etc.

Moreover, with the higher degree of digitization, the demands for digital contents become higher. But it is mainly based on foreign program for good HD content, and domestic contents production is less. However, the key point of digital converge industry development is the digital contents, and the high quality digital contents will attract end-user to adopt the digital service.

Chapter 8 Emerging media platform-Connected TV

The three main directions of new media future development are IP, Mobile, and Consumer-centric, and the Internet TV shapes better recently. The users of new digital media receive contents not only through set-top boxes, but also through internet or offline environment, they are positioned at “new connected consumers.” In the future, new digital media industry has to balance technology criterions and innovation services of different developments, in order to satisfy different consumers.

The combination of Internet and television, which is known as "Internet TV", can be divided into watching TV program on the internet and browsing website by television. The former is value-added application of platform operators, which is known as “IPTV”; the latter is connected television with IP network, which is a consumer-oriented application.

From the view of digital radio and television media, Connected TV is an item evolved by the emerging video media platform (digital TV: Digital terrestrial TV, digital cable, and satellite television; IPTV; WebTV; Smart TV). After converging with ICT, the applications of digital TV broadcast system become quite extensive: multi-channel TV, HD TV, and handheld mobile TV; from the traditional linear production to nonlinear production; new applications such as personal TV, Internet TV, interactive TV, and community/participative TV.

The future development of Connected TV is based on the Internet, and whether from the view of internet environment or traditional media, the development trend is the same. The terminal Connected TV has both media signal reception and internet connection, such as HBB. Moreover, the terminal devices of the wireless multimedia, like smart phone TV sets, are also a type of integrated wireless terminal device. The connected terminal media device is the important part of connected consumer video media platform. In addition, the diversity and entertainment of terminal Connected TV, such as higher quality display, 3D virtual applications, immersive interaction, etc., will bring a new development of media on the Internet application. Therefore, because of combining with the traditional media, connected media terminal devices derives more applications of Connected TV.

The regulations of Connected TV industry is waited to be established. Those problems, including Digital Content Copyright Law, Personal Data Protection Law, operation of Connected TV industry, and related technology and systems, need to be resolved. The new applications and functions of terminal Connected TV devices will expand with the development of Connected TV.

Chapter 9 Proposal and Suggestion of TV Industry Database

TV industry database will be based on the results of annual surveys, and it will present a multi-year and continuous industry database. In addition, NCC will also integrate different databases inside and then provide a multi-database with search and supervision functions via cross-search and computing.

For the content of database, it is mainly based on the business demands of the authorities, and the data sources are from annual industry survey and uploading by operators. The data sourced from survey should be an annual census, and the data sourced from uploading should unify the definitions for the same statistic standard. And the survey data of recent five years are needed for a complete multi-year time-series industry database, as the foundation for data access and analysis in the future.

The businesses in different places are different, so the survey objects, data collection, and analysis results could be different, too. As a result, the most important thing is to integrate the demands of each department and to clarify the scale of every businesses and survey objects, and it will come to a common consensus.

In addition, NCC has accumulated a huge mass of data, so the past data should be arranged systematically for enhancing the efficiency. Because the data items are jumbled, each department needs to check business demands, to simplify present items, and to delete too old or no longer used items, for facilitating data arrangement and increasing the willingness of operators to upload data.

Parts of the data are sourced from the operators, and because some data are confidential information, it is suggested that operators could upload by themselves, in order to improve the efficiency of data retrieval and to reduce administrative processes. However, the willingness for handing in data is low, except for license applied or for the business plan. It is suggested that there should be a regulation for uploading operating data, so the data resources are substantial. It provides systematical data collection, arrangement, and retrieval, as the foundation of supervision and policy schemes.

Chapter 10 Input-Output Analysis of Radio and Television Industry

I. The total revenue of radio and television industry is 113,734.8 million, while the market total output created by the revenue as 70,526.9 million, and the input-output multiplier of radio and television industry is 0.22. For the total output creation, when the eventually need of radio and television industry increases per billion, the total output of system will enhance additional 398.2 million. Compared to other industry sectors, the ranking is 23, but if for the 13 service industry sectors, the ranking is 2. It shows radio and television industry plays an important role in the service industry.

II. For the added-value creation, when the eventually need of radio and television industry increases per billion, added-value of system will enhance additional 241 million. Compared to other industry sectors, the ranking is 31, but if for the 13 service industry sectors, the ranking is 2.

III. For the labor remuneration creation, when the eventually need of radio and television industry increases per billion, labor remuneration of system will enhance additional 92 million. Compared to other industry sectors, the ranking is 19, but if for the 13 service industry sectors, the ranking is 12.

Chapter 11 Conclusion and Suggestion

SWOT analysis of domestic TV industry is as follows:

I. Strengths

1. Hardware production technology is mature; IT industry with a highly international competition.
2. The emergence of creative talents improves TV formats production.
3. High penetration of domestic network helps the development for platform convergence.

II. Weaknesses

1. Digitization is not enough; digital policy is not clear.
2. Domestic market is small and lacks for competition.
3. Degree of self-made program is low; frequency of replay is high.
4. Monopoly audience measurement affects industry development.
5. Audiences decrease time for watching TV.

III. Opportunities

1. Policy drives new video industry as the seventh emerging industry.
2. Video sites pay attention to copyright sales.
3. Large Chinese market strengthens the energy for cultural output.

IV. Threats

1. Piracy is rampant, video sites take markets.
2. The rise of the China market attracts domestic related resources.International competition is getting strong.

Suggestions are as follows:

I. Immediately Workable Proposals

1. Integrating resources and needs, activating the performance of TV industry

database: To integrate the demands and to clarify the scope and definition of business and the survey objects. Also, depending on business needs, streamlining the existing items, deleting too old or no longer used items. Moreover, synthesizing the past resources should be systematical and standardizing, for strengthening the performance of information exchange.

2. Promotion of Digitization: the change of TV industry for digitization should be "sensible," so that people understand the changes and benefits of quality and form of the reception after digitization, and in particular, the content should give a differentiation service.

II. Long-term Proposals

1. Training of human resources, strengthening the capabilities: It is recommended to cultivate personnel who expertise in the digital copyrights authorization, international marketing, and cross-platform sale, to improve the competitiveness of Taiwan’s TV industry.
2. The competent authorities responsible for regulating and fostering: the competent authorities should clearly define regulations and the market "monopoly," to avoid controversy and to provide the clear directions for operators. Second, regulations should meet the needs of Taiwan's social environment and industry development, rather than transplanting from Europe, Japan, or America. Furthermore, for fostering part, it can be learned from Ministry of Economic Affairs for counseling the electronics industry in the past, and then according to the characteristics of Taiwan's TV industry, to develop "cloud" of this area and digital content.
3. Neutralizing laws and regulations, strengthening market competition: to open up the market gradually, to relax the regulatory constraints, to reduce the difference control among platforms, to assist platforms with equally

accessing the channel contents, and to reach non-discrimination principle for channels effectively.

4. Placement marketing norm: It can make lower regulation about product placement excluding the type of news and children programs. However, Government needs to make the relevant specifications and to establish rules for advertising.
5. Fostering digital content industry, framing clear digitization process: It is recommended that the Government should specify the digital process, and if the operators can complete on schedule, the maximum of subscriber fees can be increase. In addition, the direct beneficiary for digitization promotion is equipment manufacturers, and there should be related measures, for example, fixed percentage of the revenue should take out for promoting digitization, to improve the overall industry.