

# 有線電視市場結構與經營區調整政策

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本研究旨在探討台灣有線電視系統市場的產業結構，並分析 NCC 之經營區調整政策。研究發現：2009 年時每一系統的平均訂戶數為 8.8 萬戶，平均營收為 6.2 億元，全國的總營收為 372 億元，總毛利為 156 億元，毛利率為 42%。至於有線電視系統市場則屬高度集中之市場，其 HHI 指數高達 8,372。此外，經營區調整政策固然能提供跨區經營的機會，但是系統經營者卻不一定會跨區經營，反而會合併成一家跨區獨占的大系統或繼續維持分區獨占的局面。因此建議 NCC 應該從「增加其他類型之電視對有線電視之競爭」及「做好有線電視獨占管制工作」等方面著手治理有線電視因為分區獨寡占所衍生的問題。

關鍵字：有線電視、市場結構、經營區政策

# Market Structure and Cable Franchise Policy Reform

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## ABSTRACT

The study aims to investigate the market structure in Taiwan's cable television industry and assess the National Communication Commission (NCC)'s approach to reforming Taiwan's cable franchise policy. The study finds that in 2009, the average number of household subscribers per cable system was 88,000, and the average revenue per system was NTD620 million; the total revenue of Taiwan's cable system market was NTD37.2 billion, with a gross profit of NTD15.6 billion and a gross profit margin of 42%; the market was a highly concentrated one with an HHI of 8,372. While cable franchise policy reform may provide an opportunity for cable system operators to expand their operation across multiple franchises, they will not necessarily do so. It is more likely cable systems will either merge into a larger player having exclusive control over several franchises or remain as a monopoly in their respective franchise markets. The study therefore recommends the NCC should seek to address problems rising from cable franchise monopolies by two approaches: "increasing inter-modal competition by introducing other types of television services," and "implementing good regulation to manage a monopolistic/oligopolistic cable industry."

Key Words: cable television, market structure, cable franchise policy