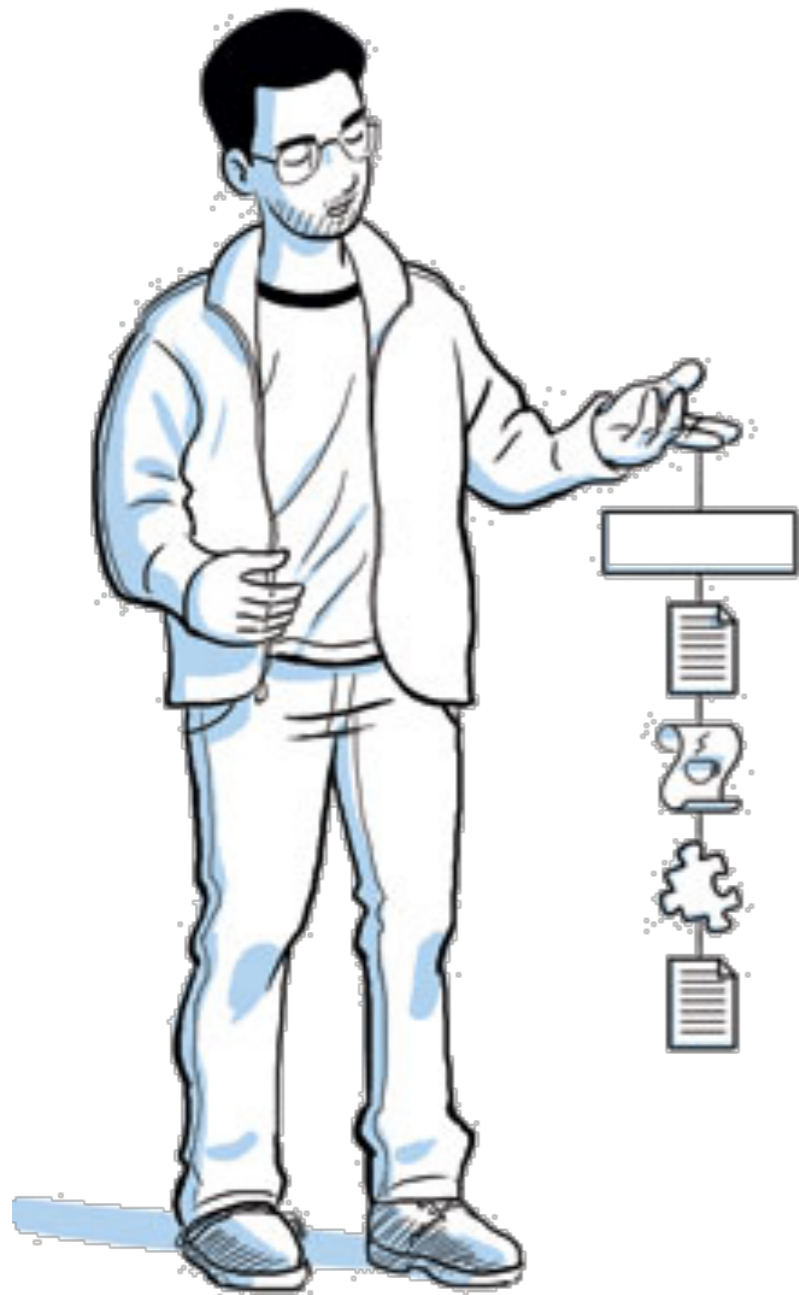




# 對「從去中心化來看各行業 及法規衝擊與人才需求」的 補充看法

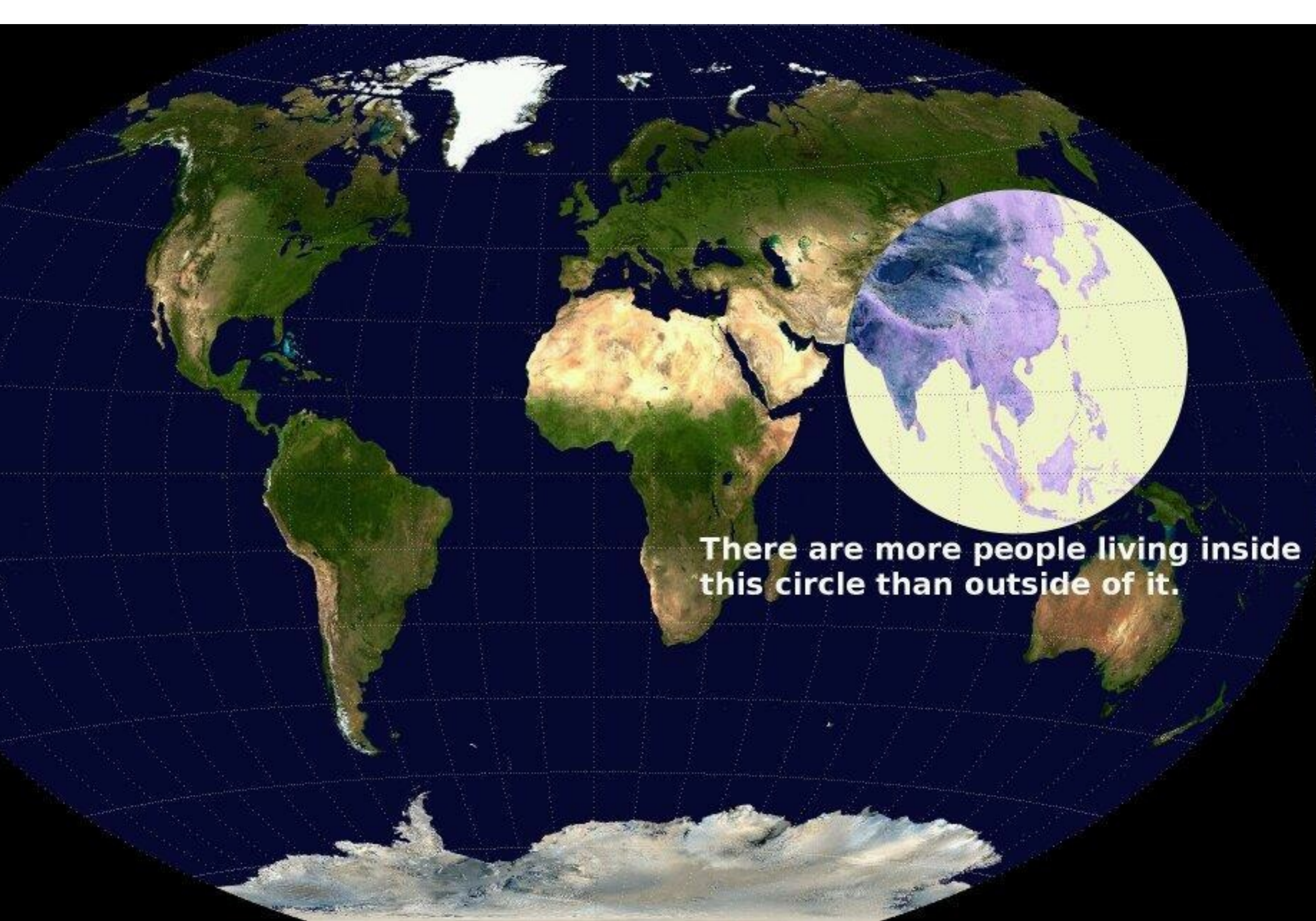


TH Schee  
#TWIGFI7 @Taipei



# 現況、治理模式、市場概況 關鍵數據？





**There are more people living inside  
this circle than outside of it.**

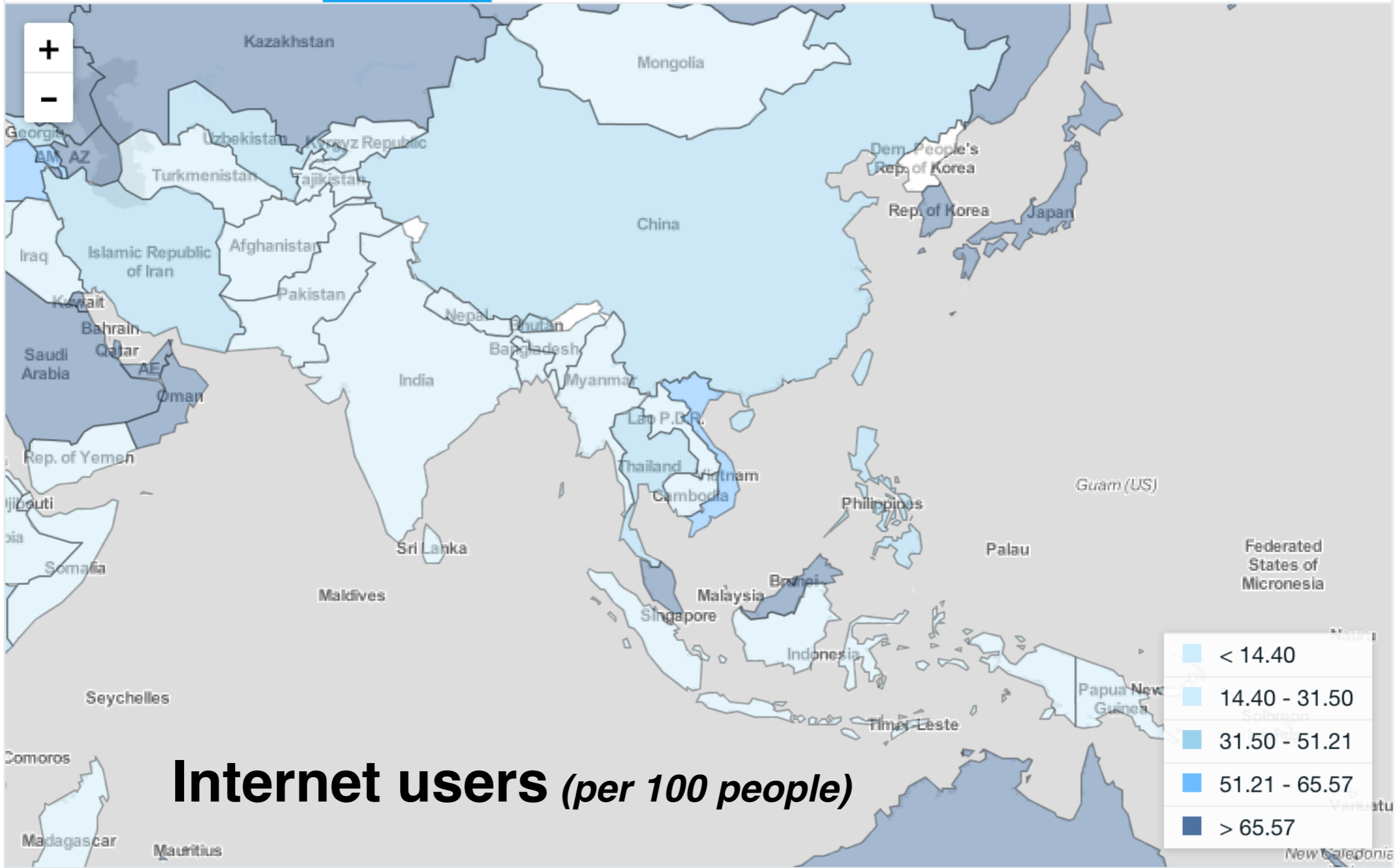
Line

Bar

Map

Share

Details



2015

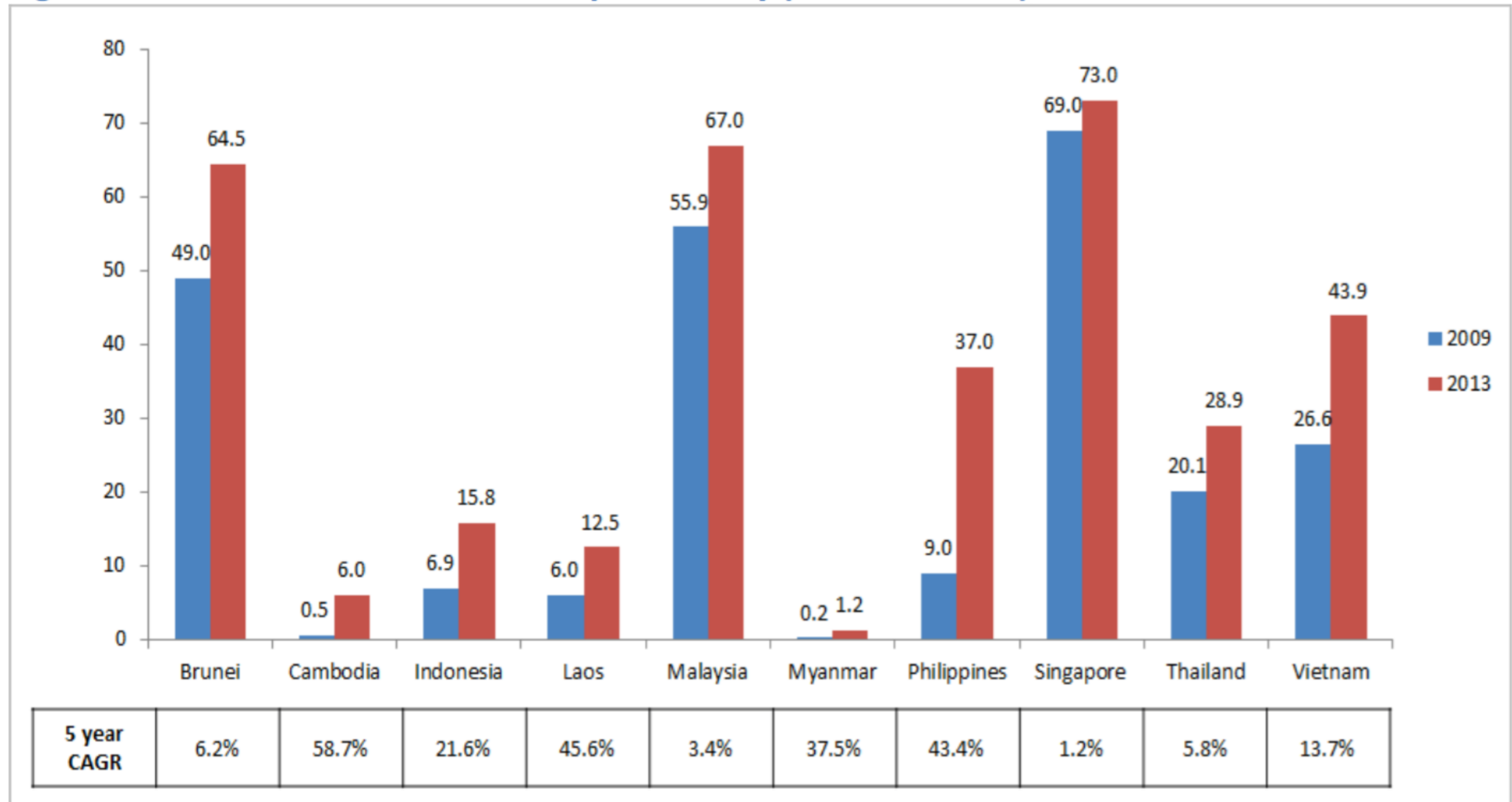


**Table 4. Internet Penetration and Growth per Cluster**

	<b>Cluster 1</b>	<b>Cluster 2</b>	<b>Cluster 3</b>
<b>% of Internet Users (2013)</b>	<i>Majority access</i> <ul style="list-style-type: none"> <li>• BR: 65%</li> <li>• SG: 73%</li> <li>• MY: 67%</li> </ul>	<i>Partial access</i> <ul style="list-style-type: none"> <li>• TH: 29%</li> <li>• VN: 44%</li> <li>• PH: 37%</li> </ul>	<i>Low access</i> <ul style="list-style-type: none"> <li>• ID: 16%</li> <li>• LA: 13%</li> <li>• KH: 6%</li> <li>• MM: 1%</li> </ul>
<b>Growth of the Internet Users (CAGR from 2009-2013)</b>	<i>Slowing growth</i> <ul style="list-style-type: none"> <li>• BR: 6%</li> <li>• SG: 1%</li> <li>• MY: 3%</li> </ul>	<i>Moderate growth</i> <ul style="list-style-type: none"> <li>• TH: 6%</li> <li>• VN: 14%</li> <li>• PH: 43%</li> </ul>	<i>Strong growth</i> <ul style="list-style-type: none"> <li>• ID: 22%</li> <li>• LA: 46%</li> <li>• KH: 59%</li> <li>• MM: 38%</li> </ul>

Source: Internet Society Global Internet Report 2014, <http://www.internetsociety.org/map/global-internet-report/>

**Figure 6. ASEAN Internet Penetration per Country (2009 and 2013)**



Source: Internet Society Global Internet Report 2014, <http://www.internetsociety.org/map/global-internet-report/>

# Mobile cellular subscriptions (per 100 people) (IT.CEL.SETS.P2)

**.my: 144**

**.mm: 77**

**.ph: 118**

**.sg: 146**

**.vn: 131**

**.id: 132**



.tw: 120+

.cn: 93

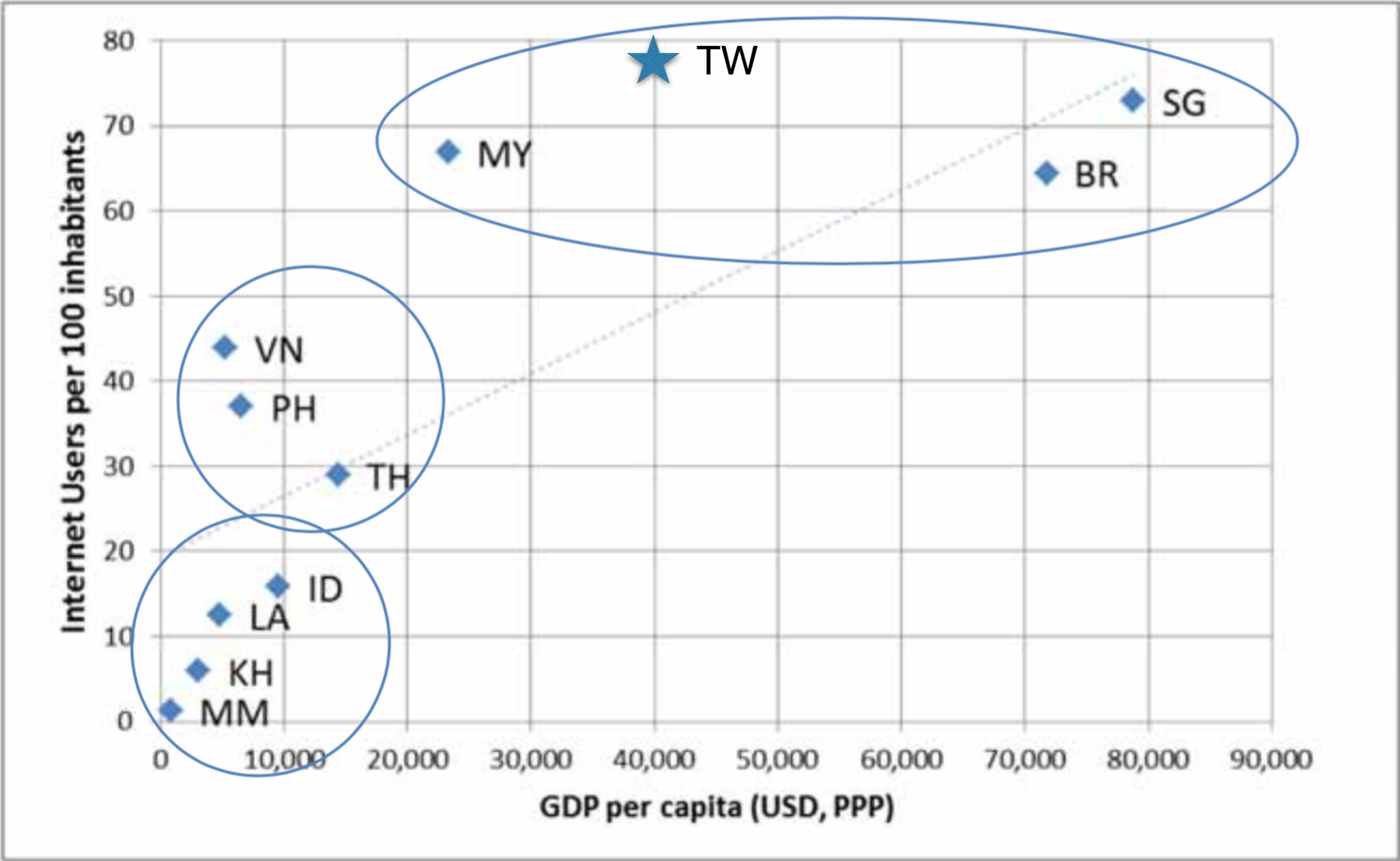
.hk: 229

.mo: 324

.jp: 125

.kr: 118

Figure 5. Percentage of Individuals Using the Internet vs GDP Per Capita (PPP) (2013)



Source: ITU World Telecommunication/ICT Indicators Database 2014; World Bank Indicators (2014), GDP per capita, PPP (current international \$), <http://data.worldbank.org/indicator/NY.GDP.PCAP.PP.CD>



# 15歲以上女性在過去一年曾使用信用卡比例 (2014)

以色列 75.5%	新加坡 30.8%
加拿大 70.8%	歐元區 29.4%
盧森堡 63.7%	荷蘭 17.1%
紐西蘭 61.5%	拉美 15.0%
<b>香港 58.3%</b>	全球平均 13.9%
<b>日本 58.1%</b>	<b>中國 12.4%</b>
<b>韓國 57.0%</b>	希臘 5.5%
澳大利亞 56.1%	<b>菲律賓 2.7%</b>
挪威 51.9%	南亞 1.7%
英國 50.8%	



- TVBS News
- FTV News
- CuTV News
- SET News
- EBA News
- ETTV News
- CTV News

**24h news stations ×7**

In recent years, Taiwan has a reputation for its freedom in news media. According to Reporters Without Borders, the Press Freedom Index in Taiwan is one of the top five in Asia. Despite a relatively small news media market, Taiwan has over 24/7 news channels, compared to the amount both in the United States and the Great Britain which is three in total. Taiwan also acquires a highest density of 24/7 (Seven News Gathering) networks.

# 機會和挑戰？



SEA is the world's fastest growing internet region (~14% 5-year CAGR) with an existing internet use base of 260m growing to ~480m users by 2020 (~3.8m / month)

Consequently, the SEA internet economy is expected to grow to ~\$200+ billion by 2025; driven mostly by the growth of first hand eCommerce market (32% CAGR over next 10 years) followed by online media (18% CAGR), and online travel (15% CAGR)

Source: e-conomy SEA, Unlocking the \$200 billion digital opportunity in Southeast Asia (Google + Temasek)

# 五·大·問·題

1. Talent / Engineering
2. Payment mechanisms
3. Internet infrastructure
4. Logistic infrastructure
5. Lack of consumer trust

人口

人口紅利

公共支出效益

# 本次小結

- ★ 先用「現代」的方式了解現況
- ★ 不要直接談法規調適
- ★ 不要直接談資源的配置
- ★ 多從法的角度談治理、管理和市場競爭