

國家發展計畫

National Development Plan

國發會綜合規劃處

Department of Overall Planning, National Development Council

壹、國家發展計畫介紹

Introduction to the National Development Plan

本會（及前身）自 42 年起編擬國家發展（建設）計畫，迄今已編擬 18 期，秉持前瞻、務實原則，推動各期中長程計畫，以順應各發展階段的需要，促進資源的有效利用及國家的永續繁榮。

自 1997 年起，國家發展計畫配合總統任期每四年一編，體現總統治國理念與院長施政方針，揭示政府施政方向，為綱領式、功能別的政策規劃，並引導部門別、年度施政計畫的撰擬。

The National Development Council (NDC) (and its predecessor) has been formulating national development (construction) plans since 1953. So far, 18 terms have been formulated. Adhering to the principles of being forward-looking and pragmatic, we promote medium-term / long-term plans in each phase to meet the needs of each stage of development and promote effective utilization of resources and sustainable national prosperity.

Since 1997, the National Development Plan has been drawn up every four years in line with the presidential term. It embodies the president's governing

philosophy and the administrative priorities of the premier, reveals the government's policy direction, is programmatic and functional policy planning, and guides ministerial and annual policy plan formulation.

Department of Economic Development, National Development Council

貳、第19期國家發展計畫

The 19th National Development Plan

「國家發展計畫（110 至 113 年）」（即第 18 期計畫）即將實施屆滿，國發會爰依據總統治國理念及院長施政重點，衡酌國際發展趨勢及國內中長期重要課題，研擬「國家發展計畫（114 至 117 年）」，訂定未來四年國家發展策略，做為政府各機關的施政依據。重要內容摘述如下：

The "National Development Plan (2021 to 2024)" (the 18th term) is about to expire. Based on the president's governing philosophy and the premier's policy priorities, the NDC has formulated the "National Development Plan (2025-2028)" considering international development trends and domestic medium- and long-term important issues, formulating national development strategies for the next four years as the basis for government agencies to implement policies. The key contents are summarized as follows:

一、前瞻全球大趨勢

Looking ahead to global trends

全球經濟自 2023 年起穩步復甦，2024 年可望呈現軟著陸。根據標普全球（S&P Global）2024 年 7 月預測，2025 至 2028 年全球經濟成長率平均為 2.75%，高於 2020 至 2024 年的 2.38%，略低於 2010 年代的 3.13%。未來四年國際重大發展趨勢包括：

（一）經貿成長趨勢：地緣經濟碎片化加劇，削弱全球中期經貿成長動能。

(二) 人工智慧革命：生成式 AI 具提升企業生產力之潛力，將重塑全球成長路徑。

(三) 淨零碳排轉型：各國及主要組織積極推動減碳作為。

(四) 供應鏈重組：地緣政治牽動全球供應鏈布局，主要國家爭相布局與搶占晶片及礦物等關鍵原物料。

全球潛在風險因素包括：地緣政治風險擴大、美中角力持續、中國經濟前景不明、全球氣候變遷惡化、主要經濟體利率政策走向不確定性等。

The global economy has recovered steadily since 2023, and is expected to undergo a soft landing in 2024. According to S&P Global's July 2024 forecast, the global economic growth rate will average 2.75% from 2025 to 2028, higher than the 2.38% from 2020 to 2024 and slightly lower than the 3.13% in the 2010s. Major international development trends in the next four years include:

- (1) Economic and trade growth trends: Geo-economic fragmentation will intensify, weakening global medium-term economic and trade growth momentum.
- (2) Artificial intelligence revolution: Generative AI has the potential to improve corporate productivity and will reshape the global growth path.
- (3) Net-zero carbon emission transition: Countries and major organizations will actively promote carbon reduction actions.
- (4) Supply chain reorganization: Geopolitics will affect the global supply chain strategy, with major countries vying to deploy and seize key raw materials such as chips and minerals.

Potential global risk factors include: expanding geopolitical risks, continued competition between the United States and China, unclear economic prospects for China, worsening global climate change, and uncertainty about the direction of interest rate policies in major economies.

二、中長期課題研析

Research and analysis of medium and long-term issues

臺灣未來發展面臨的重要中長期課題包括：經濟、社會、國土與永續發展等層面。

- (一) 人口與社會發展：2025 年臺灣將邁入超高齡社會，2028 年人口紅利消失；AI 技術發展及淨零轉型帶動人才需求，需充裕 AI 及綠領人才；所得分配尚需改善，讓成長果實全民共享。
- (二) 產業發展衡平：2022 年 ICT 製造業占製造業 GDP 比率由 2011 年 43.5% 增至 58.5%；同期電子零組件業附加價值率 49.7%，為 2011 年的 1.7 倍（電腦電子產品及光學製品業為 1.6 倍）；服務業與傳統製造業發展相對遲滯，2023 年服務業占 GDP 比率由 2011 年 65.6% 降至 61%。
- (三) 科技研發能量：臺灣科技實力備受全球肯定，依 IMD 評比，我國每千人研發人力全球第 2；研發支出占 GDP 比率、15 歲 PISA 數理能力測驗均位居全球第 3。惟臺灣為技術入超國，且企業投入基礎研究相對不足，2022 年企業占整體基礎研究比率僅 9.4%，不利創新成長。
- (四) 淨零永續發展：淨零碳排蔚為國際趨勢，歐盟 CBAM 已於 2023 年 10 月試行；國際品牌大廠宣示 2030 年前達成零碳排或碳中和；依 IMD 世界競爭力評比，臺灣能源密集度尚待提升。
- (五) 強化國土韌性：氣候變遷影響和風險逐漸複雜且更難管理，需強化國土管理與保育融合發展；城鄉區域發展不均，有必要加強進行跨區域、跨領域合作及區域治理；為因應缺水與淹水的風險，需強化水資源建設與承洪韌性。

Important medium-and long-term issues facing Taiwan's future development include: economic, social, national land and sustainable development.

- (1) Population and social development: Taiwan will become a super-aged society in 2025, and the demographic dividend will disappear by 2028; AI technology development and net-zero transition will drive talent demand, and there is a

need to provide sufficient AI and green-collar talents; income distribution still needs to be improved to allow the fruits of growth to be shared by all.

- (2) **Balanced industrial development:** The ratio of ICT manufacturing to manufacturing GDP in 2022 increased from 43.5% in 2011 to 58.5%; during the same period, the added value rate of the electronic components industry was 49.7%, 1.7 times that of 2011 (computer and electronic products and optics manufacturing industries were 1.6 times); the development of the service industry and traditional manufacturing industry is relatively sluggish, and the ratio of the service industry to GDP in 2023 dropped from 65.6% in 2011 to 61%.
- (3) **Technology R&D capability:** Taiwan's technology power is recognized globally. According to the IMD evaluation, Taiwan ranks second in the world in terms of R&D manpower per 1,000 people; the ratio of R&D expenditure to GDP and the 15-year-old PISA math and science ability test both rank third in the world. However, Taiwan has a technical services trade deficit, and enterprises have relatively insufficient investment in basic research. In 2022, enterprises accounted for only 9.4% of the overall basic research ratio, which is not conducive to innovative growth.
- (4) **Net-zero sustainable development:** Net-zero carbon emissions have become an international trend, and the EU CBAM was trialed in October 2023; major international brands have announced that they will achieve zero carbon emissions or carbon neutrality by 2030; according to IMD world competitiveness rankings, Taiwan's energy intensity still needs to be improved.
- (5) **Enhance national land resilience:** The impacts and risks of climate change are becoming increasingly complex and more difficult to manage, and it is thus necessary to strengthen the integrated development of national land

management and conservation; urban and rural area development is uneven, and it is thus necessary to enhance cross-region, cross-sector cooperation and regional governance; to cope with the risk of water shortage and flooding, enhance water resources construction and flood resilience are required.

三、國家發展目標設定

Setting of national development goals

(一) 總體經濟目標

國發會綜合考量國內外主客觀條件及情勢，以及政府積極性政策作為，設定 2025 至 2028 年經濟成長率 2.8%~3.6%、每人 GDP 39,105 ~ 42,787 美元、失業率 3.2%~3.5%，以及核心消費者物價指數年增率（CPI）平均在 2% 以下之總體經濟目標。依據未來 4 年濟成長率，114 年起，每人 GDP 可望超越南韓，並持續擴大與日韓的差距；2027 年每人 GDP 可望突破 4 萬美元，自 3 萬美元以來僅歷時 6 年；2028 年臺灣名目 GDP 規模將接近 1 兆美元。

(二) 重要經社環指標

另為達到均衡臺灣、包容成長目標，本計畫並篩選社會、經濟、環境等面向重要指標，以體現政府施政重點，落實推動「國家希望工程」。

(1) Macroeconomic Targets

Considering domestic and foreign subjective and objective conditions and situations, as well as the government's proactive policies and actions, the NDC has set the macroeconomic targets of an economic growth rate of 2.8% to 3.6%, GDP per capita of US\$39,105 to 42,787, unemployment rate of 3.2% to 3.5% and average annual increase rate of the core consumer price index (CPI) below 2% from 2025 to 2028. Based on the economic growth rate in the next four years, GDP per capita is expected to surpass South Korea in 2025 and continue to

widen the gap with Japan and South Korea; GDP per capita is expected to exceed US\$40,000 in 2027, only 6 years since it reached US\$30,000. Taiwan's nominal GDP will be close to US\$1 trillion in 2028.

(2) Key economic, social and environmental indicators

In addition, in order to achieve the goal of balanced Taiwan and inclusive growth, this plan also selects important social, economic, and environmental indicators to reflect the government's policy priorities and the implementation of the "National Project of Hope".

社會 Society	維持每戶可支配所得基尼係數不超過0.35 Maintain the Gini coefficient of disposable income per household at no more than 0.35.
	近5年底層40%家戶人均可支配所得平均年成長率，高於全體家戶人均可支配所得平均年成長率 In the past five years, average annual growth rate of per capita disposable income of the bottom 40% of households higher than average annual growth rate of per capita disposable income of all households.
	平價優質及普及的托育服務，0-3歲家外送托率達OECD國家標準（36%） Affordable, high-quality and widespread childcare services, enrolment rate of children under age 3 in early childhood education and care reaches the OECD country standard (36%).
	直接興建社宅、包租代管及租屋補貼合計每年百萬戶 The total number of direct construction of social housing, leasing and subleasing management and rental subsidies is one million households per year.
	長照服務涵蓋率達87% Long-term care service coverage reaches 87%.
	落實8年888計畫，三高病人80%進入照護、80%接受生活諮商、80%有效控制 With the implementation of the 8-year 888 plan, 80% of patients with the "three highs" enter care, 80% receive life consultation, and the condition of 80% is effectively controlled.

經濟 Economy	發展五大信賴產業（半導體新增產值2兆6,578億元；AI產值2026年突破兆元；安控資安產值突破1,300億元；衛星通訊產值300億元；軍工—無人機產值300億元） Develop "Five Trust Industries" (Semiconductors output value increase by NT\$2.6578 trillion; AI output value exceeds NT\$1 trillion in 2026; Security control and cyber security output value exceeds NT\$130 billion; Satellite communications output value is NT\$30 billion; Military industry-drone (UAV) output value is NT\$30 billion.)
	新創投資金額2027年起每年1,500億元 Achieve an annual new start-up investment of NT\$150 billion starting from 2027.
	翻轉弱勢產業，至少3產業達到產值增加1.5倍 Flip weak industries, with at least three industries increasing their output value by 1.5 times.
	培育AI等人文數位人才及STEM跨領域人才逾45萬人次 Cultivate more than 450,000 AI and other human-centered digital talents and STEM cross-field talents.
環境 Environment	推動140項攸關地方發展的基礎建設，均衡臺灣發展 Implement 140 infrastructure projects related to local development to balance Taiwan's development.
	首次推動主題型區域治理沙盒及參與式公共治理平臺 Implement a thematic regional governance sandbox and participatory public governance platform for the first time.
	首次整合，構築4個地方創生廊帶，創造多元就業 Integrate for the first time to build 4 regional revitalization corridors to create diversified employment.
	協助600個農村再生社區活化發展 Assist the revitalization and development of 600 rural regeneration communities.
	溫室氣體淨排放量2030年較2005年減少23%~25% Net greenhouse gas emissions reduced by 23% to 25% in 2030 compared with 2005.
	能源效率年均改善率達4%以上 Average annual improvement rate of energy efficiency more than 4%.

四、國家發展策略

National Development Strategy

本計畫為落實賴總統「國家希望工程」揭示的「創新繁榮的臺灣」、「公義永續的臺灣」與「民主和平的臺灣」三大國政願景，透過八大施政目標，擴大社會投資，減輕家庭負擔；創新經濟，智慧國家；綠色成長與 2050 淨零轉型；擴大醫療投資，打造健康臺灣；均衡臺灣，在地希望；厚植軟實力，打造國家品牌；邁向多元平權的共榮社會；打造韌性臺灣，維護安全與和平，追求包容性成長，打造臺灣成為幸福的人工智慧之島。

This plan is to implement the three national political visions of "An Innovative and Prosperous Taiwan", "A Just and Sustainable Taiwan" and "A Democratic and Peaceful Taiwan" revealed in President Lai's "National Project of Hope" through eight policy goals: expanding investment in society, easing household burdens; powering the economy with innovation and smart technology; promoting green growth and net zero by 2050; expanding medical investment for a healthier Taiwan; balancing development to spread hope across Taiwan; cultivating soft power, building a national brand; achieving a pluralistic, egalitarian, prosperous society; forging a resilient Taiwan, upholding security and peace, pursue inclusive growth, and make Taiwan a happy island of artificial intelligence. 🌐