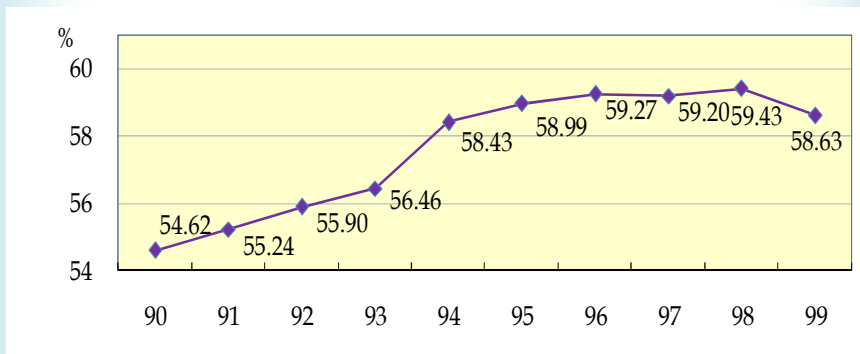


附件四：「臺灣之行動電話營運狀況(MOBILE NETWORK MARKET)」簡報
稿





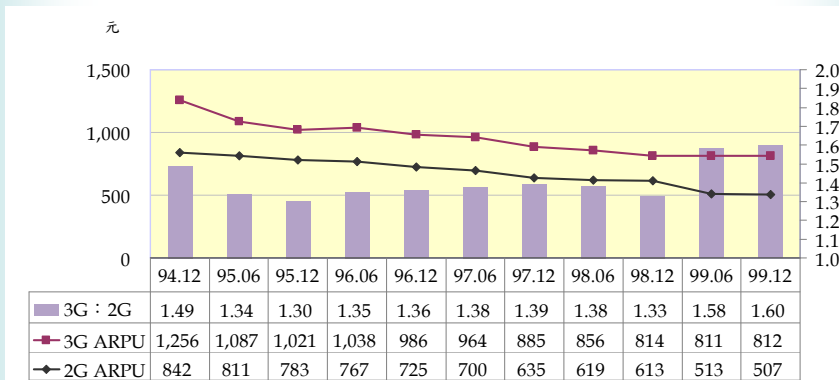
行動通信營收占整體電信營收之比例



2



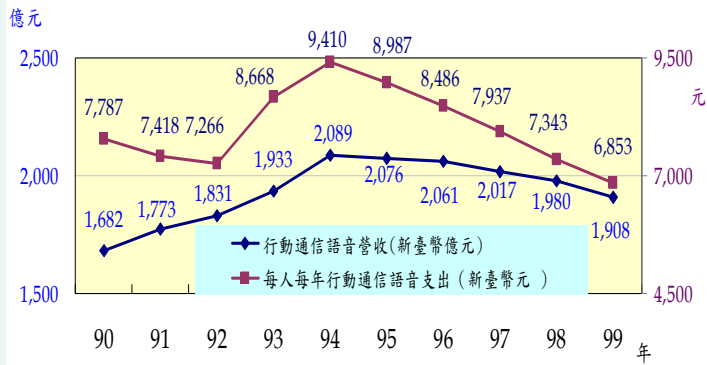
主要業者2G與3G之ARPU



3



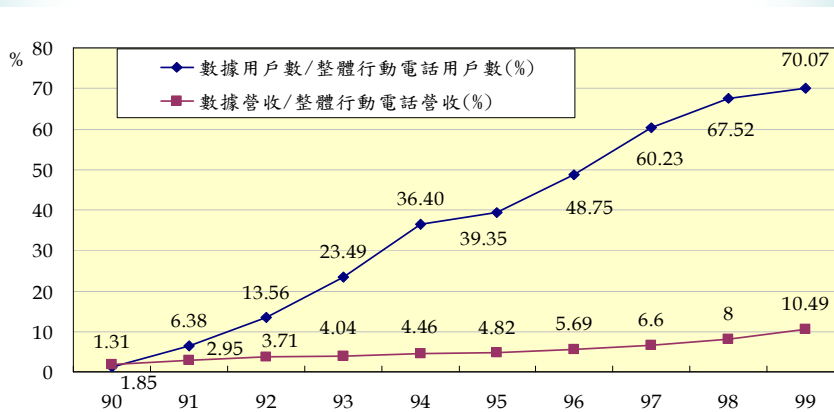
行動通信語音服務營收



4



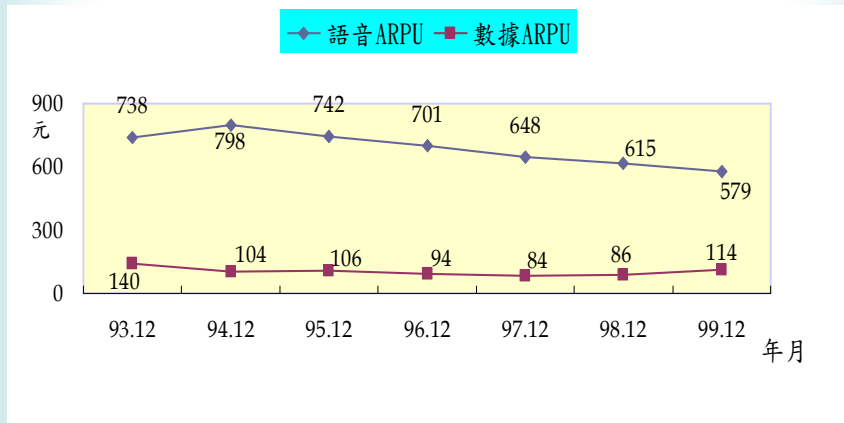
行動通信數據服務占整體行動通信比例



5



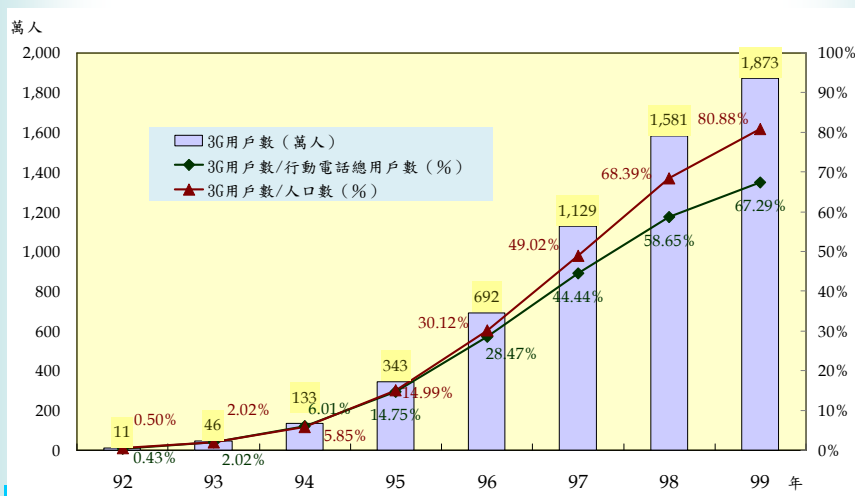
行動通信語音及數據各年12月ARPU



6



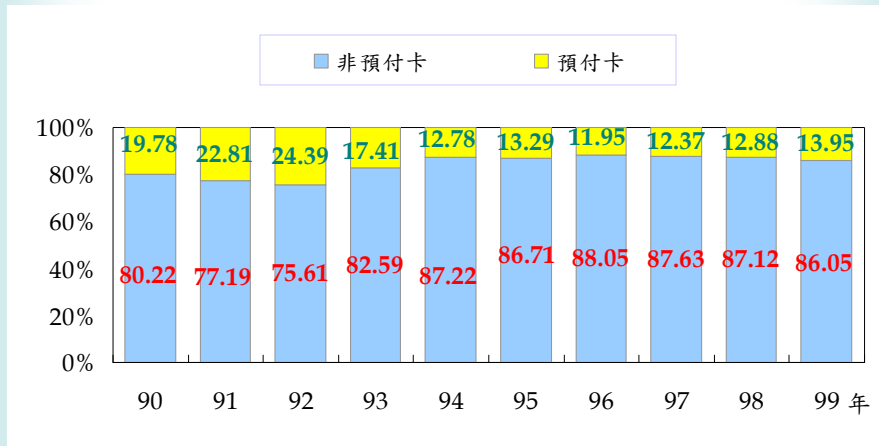
3G用戶數



7



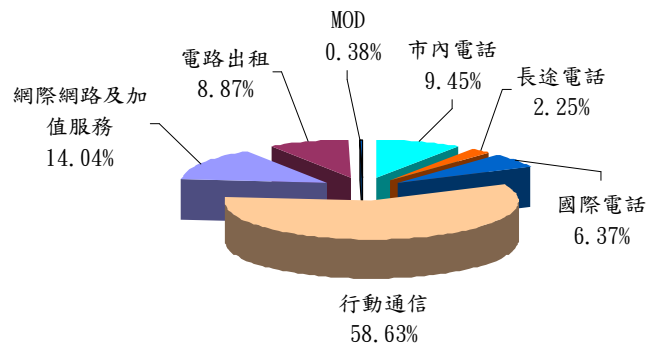
預付卡用戶比例



8



99年電信各類服務占電信服務總營收之比例



9



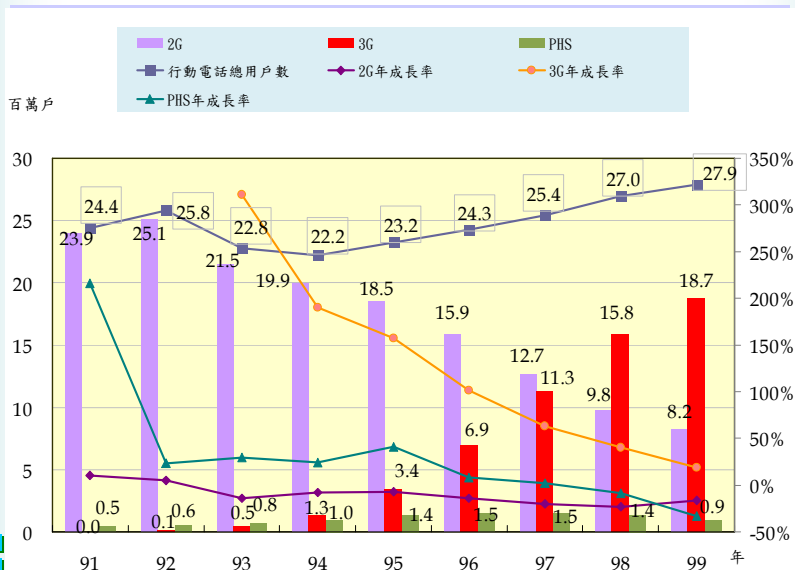
99年電信各類服務占電信服務總營收之比例

業務分類		98年	99年	成長比例	
總營收(億元)		3,632億元	3,643億元	0.32%	
電信業務 占總營收 比例	行動通信業務	2G	22.62%	15.12%	-33.15%
		3G	35.85%	42.78%	19.33%
		PHS	0.78%	0.58%	-25.08%
	市內電話業務		9.76%	9.45%	-3.18%
	長途電話業務		2.46%	2.25%	-8.54%
	國際電話業務		6.37%	6.37%	0.00%
	網際網路及加值服務		13.00%	14.04%	8.00%
	電路出租		8.66%	8.87%	2.42%

10



行動電話用戶數及成長率



11



行動通信消費糾紛



- ✓ 3G、3.5G上網傳輸時塞車或收訊訊號不良造成服務品質不佳用戶想提前解約，電信業者卻要求支付違約金



12



問題



- ✓ 在貴國是否有3G、3.5G上網傳輸時塞車或收訊訊號不良情形發生？處理程序如何？
- ✓ 對於資費方案是否有綁約機制、資費是否須核備後才可實施？審查標準為何？及用戶是否覺得費用太高？
- ✓ 對於3G、3.5G或4G之執照發放現況為何？對於新業務發照時是否採技術中立原則？



13



Digital switchover in TAIWAN

Speaker: National Communications Commission
August 15, 2011



Agenda

- ◆ Motivation & Background
- ◆ Goals and Vision
- ◆ Content and Schedule
 - build digital station
 - offer Set Top Box
 - propaganda and instruction
 - analog switch-off



1



Motivation & Background



- ◆ **June 30, 2005** the National Information and Communications Initiative (NICI) decision, Government Information Office(GIO) in conjunction with the Ministry of Transportation & Communications (MOTC), in phases, sub-regional **switch-off analog Terrestrial TV channel (the analog channels) on December 31, 2010.**
- ◆ **June 22, 2006** Council for Economic Planning and Development(CEPD) review budget of GIO “digital entertainment plan”, consider the digital television network has completed in the island of TAIWAN in the western region, requirements of the digital **switchover in 2008.**



2



Motivation & Background(cont.)



- ◆ **June 11, 2007** NICI review meeting "blueprint for the development of digital television and the 700MHz open planning issues" and decided to follow up the analog switch off issues, can **be transferred to the National Communications Commission (NCC).**
- ◆ **August 11, 2009** NICI recommends NCC imitates of **America's success**, Provide the public with digital set-top box subsidy, to reduce the analog switch-off of resistance.



3



Motivation & Background(cont.)



- ◆ **February 10, 2010** NCC report the “**digital switchover plan**” to the Executive Yuan.
- ◆ **April 21, 2010** the Executive Yuan wrote to NCC, acceleration build the **digital station**; offer digital set-top box (**STB**) to the low-income households, as well as planning analog switch-off of **supporting** measures.



4



Goals and Vision



- ◆ **Improve the coverage of digital television and the quality of digital signal**, to reduce the digital divide.
- ◆ **Promote cultural and creative industry**, digital TV and consumer electronics industry's development.
- ◆ **Turn off analog transmitters**, reduce the local government and the companies' analog TV transmitter maintenance and operation burden, meet carbon reduction objectives.
- ◆ **The propaganda and instruction**, let the public to understand the true meaning of the digital switch over.
- ◆ **Executive Offer Program**, to reduce low-income households' **burden** on purchase digital STB and safeguarding their **viewing rights**, to reduce people **complained** and local governments **against**.



5



Content and Schedule



item	content	schedule
Build digital stations	Build 50 digital stations digital coverage target of 96%	2010~2012
offer STB	about 120,000 low-income households	2011~2012
Propaganda and instruction	set up Technical Service Center (NCC) The propaganda and instruction will be held in various towns (NCC) Set up a dedicated website (NCC) propaganda and television advertising (GIO)	2010~2012
switch off	in phases, sub-regional turn off Terrestrial TV transmitters.	2011~2012



6



Content and Schedule(cont.)



Budget

Unit : Thousand US\$

YEAR	2010	2011	2012	2013	TOTAL
build digital stations	2,201	9,760	5,970	0	17,931
offer STB	0	7,154	2,946	0	10,100
propaganda instruction	0	174	1,204	442	1,820
TOTAL	2,201	17,088	10,120	442	29,851



7



Build digital stations



YEAR	2009	2010	2011	2012
New stations	n/a	7	34	9
total station	24	31	65	74
Coverage of the area	51.40%	52.02%	55.41%	57.59%
Coverage of population	96.20%	96.24%	96.65%	96.77%
Addition covered people	n/a	10,610	93,009	27,152
Total Coverage of population	21,933k	21,944k	22,037k	22,064k



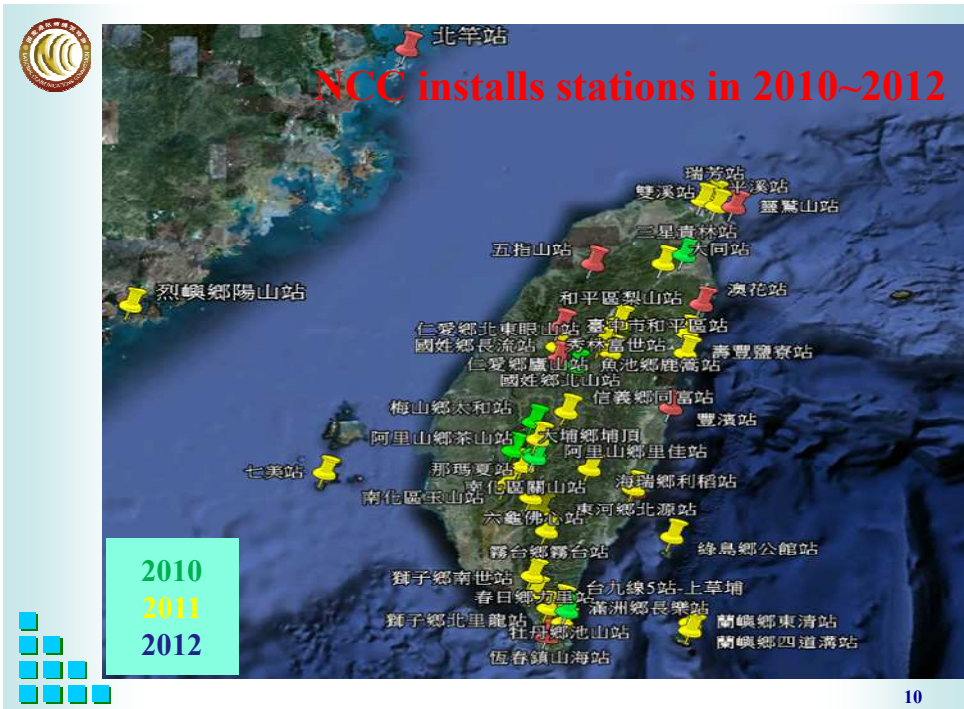
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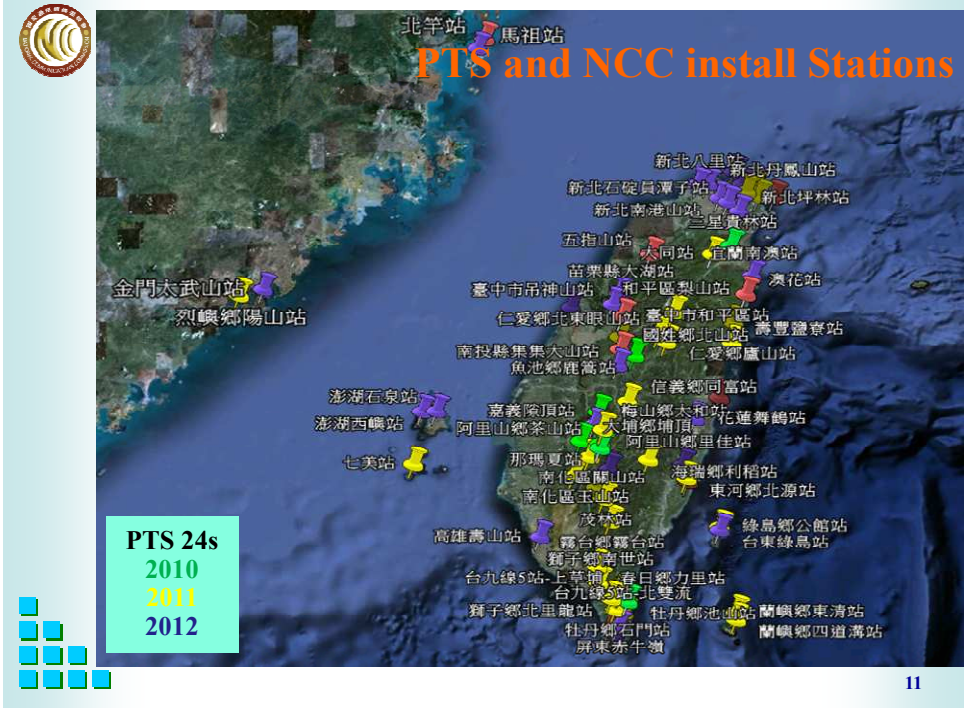
PTS installed stations before 2010



9



10



11



Offer Set Top Box



◆ International digital switchover subsidy measures

Country	Donate measures
US	offer each household two US\$ 40 coupons to buy digital STB
Japan	offer low-income households full fee (including installation)
Korea	low-income households only
Europe	Britain, France and Germany, no subsidy.
China	The household purchase energy-saving appliances will have 300 to 850 RMB\$ of subsidy.



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Offer Set Top Box(cont.)



◆ implementation plan

item	content
offer for	About 120,000 low-income households
how to do	Install a set of HD STB for them
budget	US\$ 8.7 million (STB US\$ 40 · Install fee US\$ 43)
schedule	2011 Apr.~2011 Aug. (experiment) 1,000 households 2011 Sep.~2012 Apr. (all) 119,000 households
benefits	reduce low-income households' burden and safeguarding their viewing right. reduce people complained and local governments against.



13



Offer Set Top Box(cont.)



◆ Supporting measures

cooperation unit	content
GIO	Propagate STB subsidy policy .
Ministry of the Interior	Providing low-income households' information
County government	List low-income households' information Renew low-income households' information
Village chief	Sending notifications Connect with low-income households
Technical Service Center	A phone 0800-2012-06 (pun : 2012 June) To answer the public problems on installing STB or viewing.



Propaganda and Instruction



- ◆ **Production a propaganda video**
 - Telling people what is digital TV and it advantages, and how to install digital TV, etc.
- ◆ **Production instructions**
 - Let people to take (for free).
- ◆ **Request terrestrial TV companies to do**
 - Playing marquee everyday.
 - Show the switch-off deadline in programs.
- ◆ **Request STB companies to do**
 - Post a label on products showing the schedule of switch off analog channels.





Propaganda and Instruction(cont.)



- ◆ **Set a website for digital switchover**
 - Providing switchover relations, including coverage rate, how to receive digital TV, locate of stations, offer plan to STB, and the schedule of analog switchoff.
- ◆ **Accompany with local government to hold propaganda activities.**
 - Telling people the time of changing analog TV to digital TV.
 - Advantages of digital TV
 - How to install digital TV
- ◆ **Send notifications**
 - Telling low-income households when will we switch off analog, and how to offer STB, and install time.



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Analog switch off



◆ International digital switchover timetable

National/regional	Digital beging	Analog switch off
North America	1998	2009
UK	1998	2012
Germany	2002	2008
Finland	1999	2007
Switzerland	1999	2008
Netherlands	1998	2006
Spain	2000	2010
Taiwan	2001	2010
China	1999	2015
Japan	2003	2011
South Korea	2001	2010



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Analog switch off(cont.)

- ◆ **Sub-regional off the analog channels**
 - January 1, 2012 onwards
 - County government can be used with policy makers, the early closure of analog TV transmitters
 - With the set-top box subsidy measures
- ◆ **Gradually reduce the power of the transmitters**
 - March 1, 2012 onwards
 - Large-scale broadcast station (master) simultaneously with a progressive manner to reduce the power off
 - 2012 July 31, the day before shut down all analog TV transmitter



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Analog switch off(cont.)

◆ switch off analog TV channels list

CH	Spectrum (MHz)	company	CH	Spectrum (MHz)
5	76-82	FTV	37	608-614
6	82-88	FTV	38	614-620
7	174-180	TTV	39	620-626
8	180-186	TTV	40	626-632
9	186-192	CTV	41	632-638
10	192-198	CTV	42	638-644
11	198-204	CTS	43	644-650
12	204-210	CTS	44	650-656
50	686-692	PTS	45	656-662
52	698-704	PTS	46	662-668
			47	668-674
			48	674-680



The total bandwidth is 132MHz.

NCC, and Its Duties In Content Regulations

Dept. of Broadcasting Contents, NCC

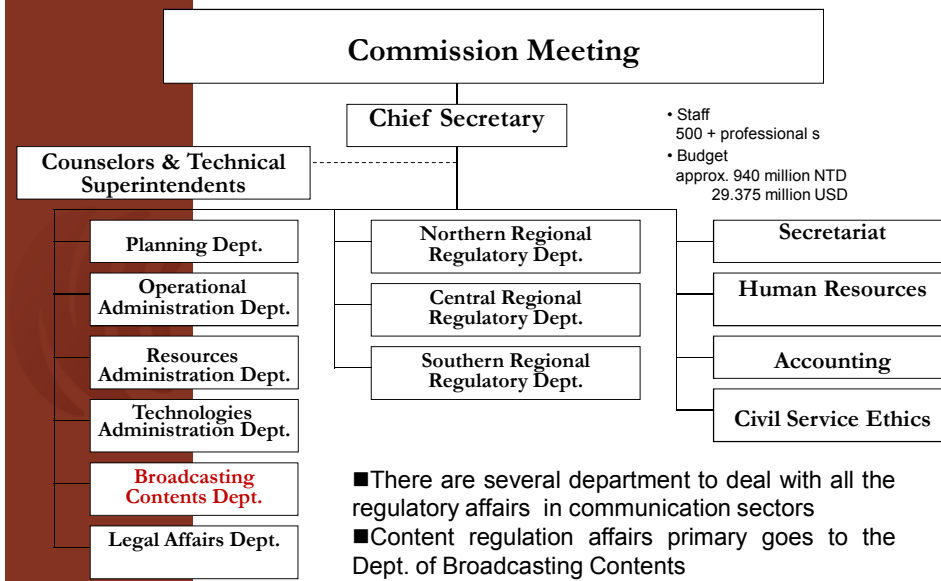
Aug, 2011

Introductions to NCC

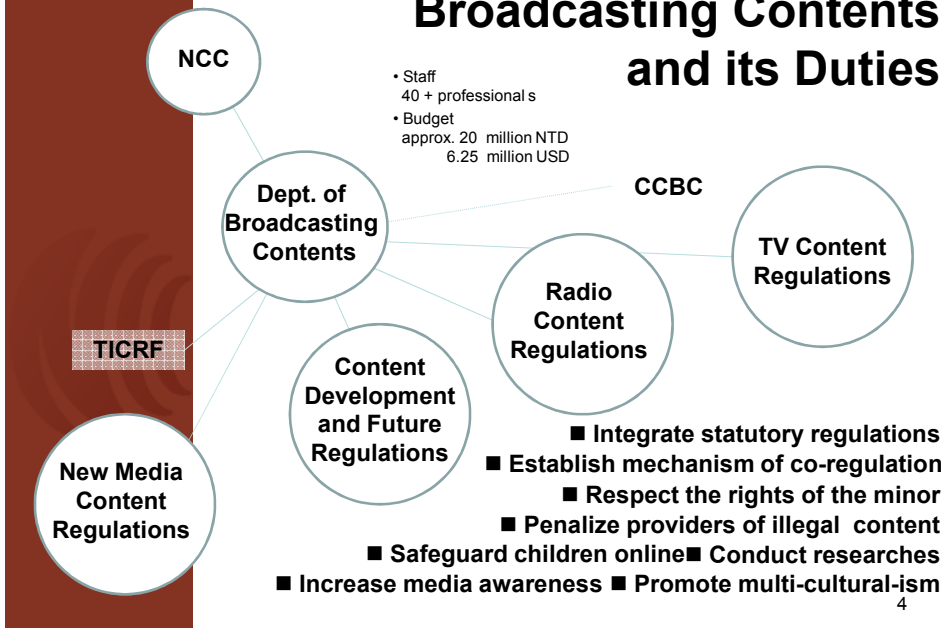
- Established on 02/22, 2006 by merging two institute
 - Directorate General of Telecom of MoTC
 - Department of Broadcasting Affairs of GIO
- Independent regulatory agency that oversees telecom and broadcasting services
- Directed by 7 Commissioners
 - Appointed by Premier, upon approval of legislators
 - 2-4 year term, with possibility of consecutive terms
 - Background: telecom, media, economics, law
- Chairperson and Vice Chairperson are determined by internal election then nominated by now
- Commission meeting held at least once every week
- The Fundamental legal framework includes
 - Fundamental Communication Act
 - Telecommunication Act
 - Radio and TV Broadcasting Acts
 - NCC organization Act



Organizational Chart of NCC

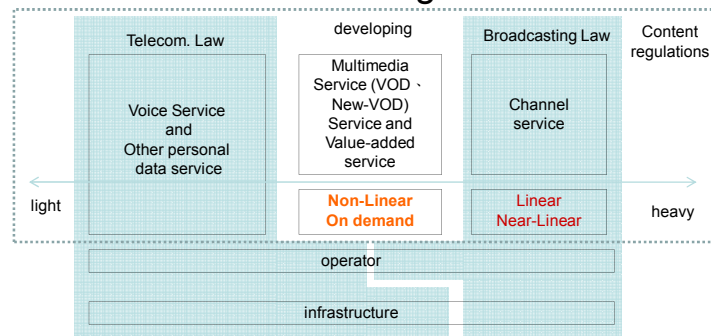


Introductions to the Dept. of Broadcasting Contents and its Duties



Content Regulations Patterns and Basic Principles in Taiwan

■ Patterns for content regulations



■ Principles for content regulations

- Respect the freedom of speech
- Safeguard the rights of children
- Establish a Mechanism of co-regulation
- Model a fair and responsible media environment
- Disclose Commercial information

5

Broadcasting Content Regulations

- As of February, 2011,
 - there are 172 legitimate radio stations in Taiwan
 - there are 5 terrestrial TV stations providing 16 channels (a field-test HD channel included), while there are over 200 channels broadcasting on other platforms like satellite, cable, and telecom platforms

■ Legal grounds for NCC, and its duties

- NCC regulates the program and advertisement services provided by legitimate channels, according to
 - "Radio and TV Broadcasting Act",
 - "Satellite Radio and TV Broadcasting Act",
 - "Cable Radio and TV Act", and
 - some other related regulations, i.e.

"Regulations Governing the Classification of Television Programs"

6



Broadcasting Content Regulations

■ Classification Criteria of TV Program

- Television enterprises shall classify television programs, under the compliance of **Regulations Governing the Classification of Television Programs**,
 - by using four ratings, which shall be labeled accordingly (see the attached graph),
 - shall broadcast said programs during the regulated hours in accordance with **Classification Broadcasting Timetable**

■ Classification Labeling : G, P, PG, R

- General Classification (briefly classified as G)
- Protected Classification (briefly classified as P)
- Parental Guidance Classification (briefly classified as PG)
- R-rated Classification (briefly classified as R)

7



Broadcasting Content Regulations

■ While self regulations go first...

- Association of Terrestrial Television Networks: gatekeeper for advertisement, programs and news broadcasted on terrestrial TV channels
- STBA : gatekeeper for advertisement , infomercial, and news broadcasted on satellite channels
- CRBA : gatekeeper for the illicit content broadcasted on radio

■ Editorial autonomy respected...

- NCC stipulate certain codes of conduct or for broadcasters' referential uses
- Unless the stations violates regulations, the freedom of speech and the editorial autonomy is well protected
- Government intrudes only after failing in self regulation

8

Broadcasting Content Regulations



■ And social forces introduced...

■ Plead analysis system

To encourage citizens to participate in the supervision of the media performances, NCC established a website to encourage the public and civil groups to voice their opinions; similarly, NCC also urged communications operators to establish their own self-regulation systems for the audience complaints

■ Consultation Commission on Broadcasting Content

NCC acquired the services of the representatives of civil groups, practitioners, and scholars or specialists in the field of media, law and social education to form the commission. NCC holds the meeting monthly and let the members make good judgement for every case after deliberations and discussions

■ Official report to the public

NCC issued an official report on those law-breaching cases to the public quarterly to improve the awareness of the audience

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New Media Content Regulations



Stricter regulations for linear content

■ NCC is also obliged to regulate content provided on the off-garden telecom platform like MOD

■ Legal grounds for NCC, and its duties

■ Channels providing program and advertisement services on telecom platform are legitimate only if they are endowed with licenses by the “**Radio and TV Broadcasting Act**”, “**Satellite Radio and TV Broadcasting Act**”. NCC regulates those contents only for breach of the law.



Light touch for non-linear content

■ As for contents **other than channels**, NCC requires the platform to accept obligations to remove the content while the content provider accepts full responsibility, in accordance with “**Telecom Act**”

10



New Media Content Regulations

- No single authority in Taiwan for the contents provided on the open-access internet
- Legal grounds for NCC, and its duties
- NCC has a responsibility for planning and **promoting the internet content self-rating system**, according to the “*Children and Youth Welfare Act*”. Duties:
 - Promote the internet content rating scheme and internet content filtering software downloading via radio programs, pamphlet and television advertisement
 - Accept complaints of harmful internet content and inform the platform to take down problem pages
 - Hold training programs for elementary school and junior high school teachers to educate parents on internet safety and how to protect their children
- A one-stop project for net complaints
 - NCC subsidizes a one-stop project to deal with the internet content complaints for the government. If the content at issue is taken as **harmful**, the evidence shall be saved and the authority concerned shall be quickly **informed**, followed by a **notice-and-take-down**

11



Content Development and Future Regulations

- Further considerations is needed to best develop policy and regulations for the convergence environment...
- Legal grounds for NCC, and its duties
- NCC has the responsibility to plan content policies and future regulations, in accordance with “ Fundamental Communication ACT”
- Principles remain:
 - Respect the freedom of speech
 - Respect editor autonomy and innovations
 - Liberalize regulations, except in violation of law
 - Subsequent punishment(not censorship)
 - Safeguard the rights of children
 - Enhance the classification criteria for TV programs
 - Promote the Internet Content Rating system
 - Establish the mechanism of co-regulation
 - Improve the self-regulation and accountability
 - Expand the public supervision

12



Thank You for Your Attention

For more information, please visit our website: www.ncc.gov.tw or
contact: ncc48@ncc.gov.tw

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Contents

Introduction

Telecom market overview

Business overview

Financial overview

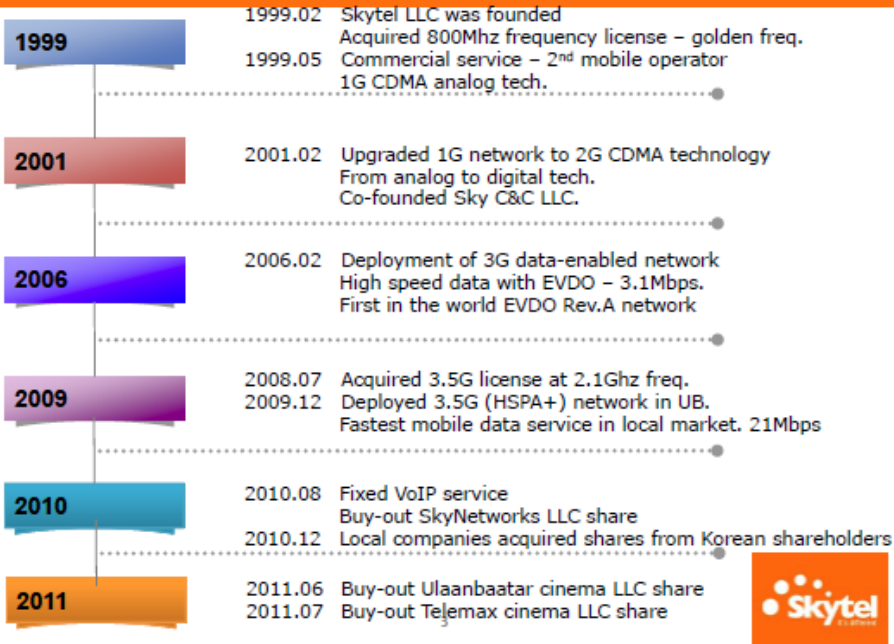
Outlook

www.skytel.mn



(

Corporate history



Mission and vision

Mission

- To add value to the stakeholders in fulfilling the needs of consumers while being socially responsible in the communities we serve.

Vision

We will be a

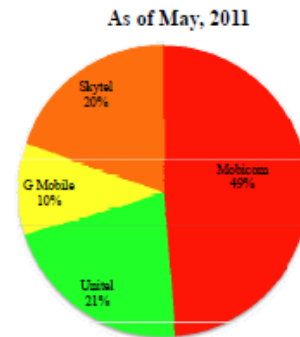
- Leading mobile operator with 100% nation-wide coverage and 4G technology
- Market leader providing services over 30% of the market
- Group company with a number of diversified subsidiaries

Mobile Operators

- 2 CDMA operators (30%)



- 2 GSM operators (70%)

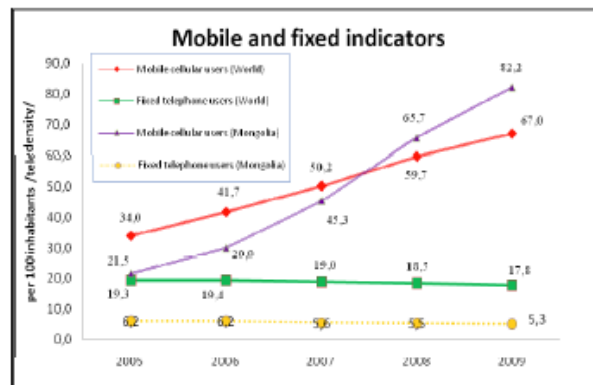


5



Fixed & mobile penetration

- Fixed telephone subscribers keep decreasing over last few years.
- Mobile penetration has increased dramatically.

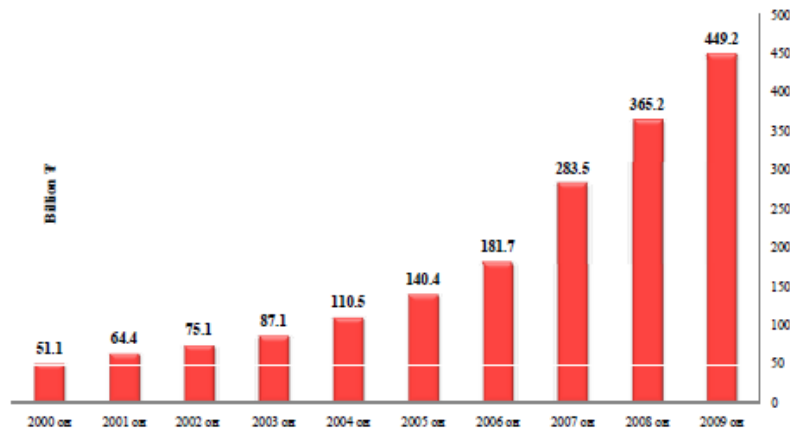


Source: ICTA

6



Total revenue of ICT sector



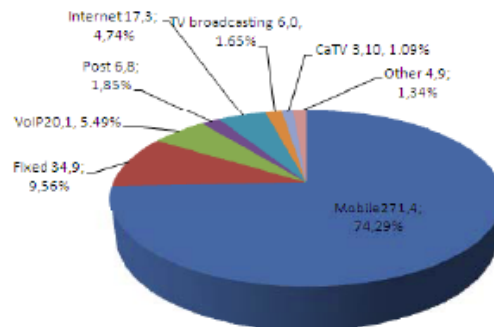
Source: ICTA

7



ICT revenue by services

- About 74% of total revenues of ICT sector are generated by mobile services
- The remaining 26% are contributed by fixed telecommunications network, VoIP, Internet, Cable TV, broadcasting and others.



Source: ICTA

8



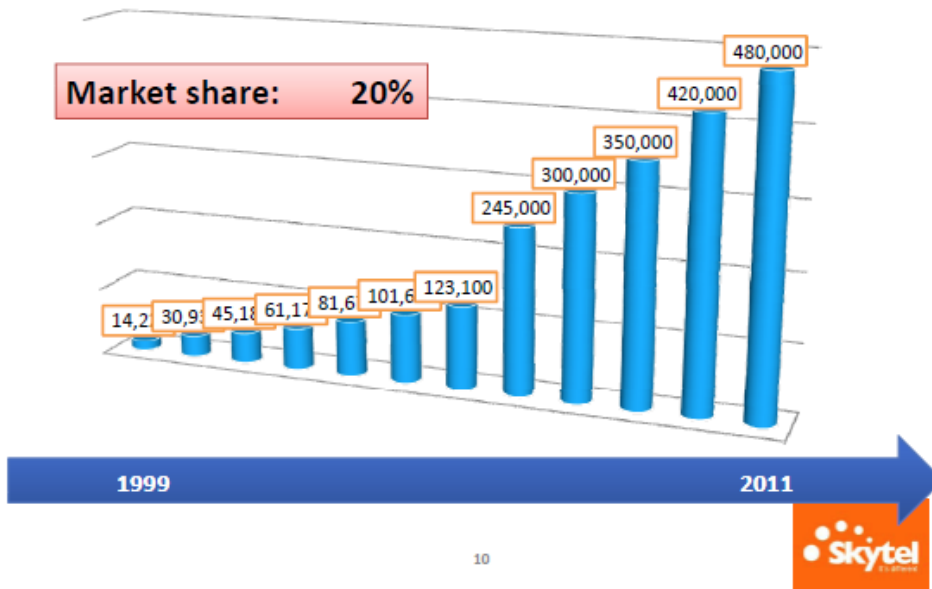
Facts and figures

- **Subscribers** **480,000**
- **ARPU** **11 US\$**
- **Market share** **20%**
- **Distribution network**
 - Branches and shops **50**
 - Dealers **2,500**
- **Coverage** **250 sites**
- **Employees** **350**



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Subscribers

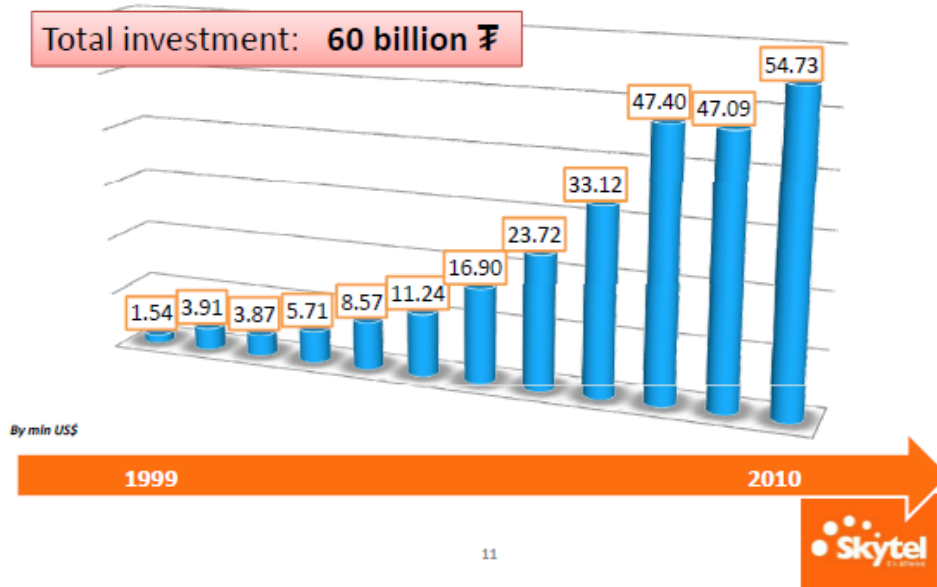


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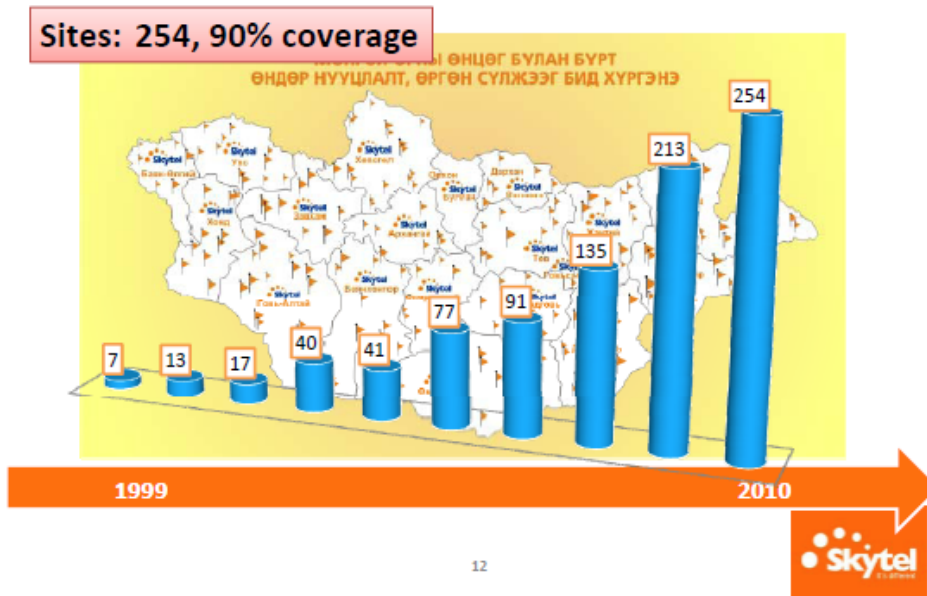
Sales

Total investment: 60 billion ₮

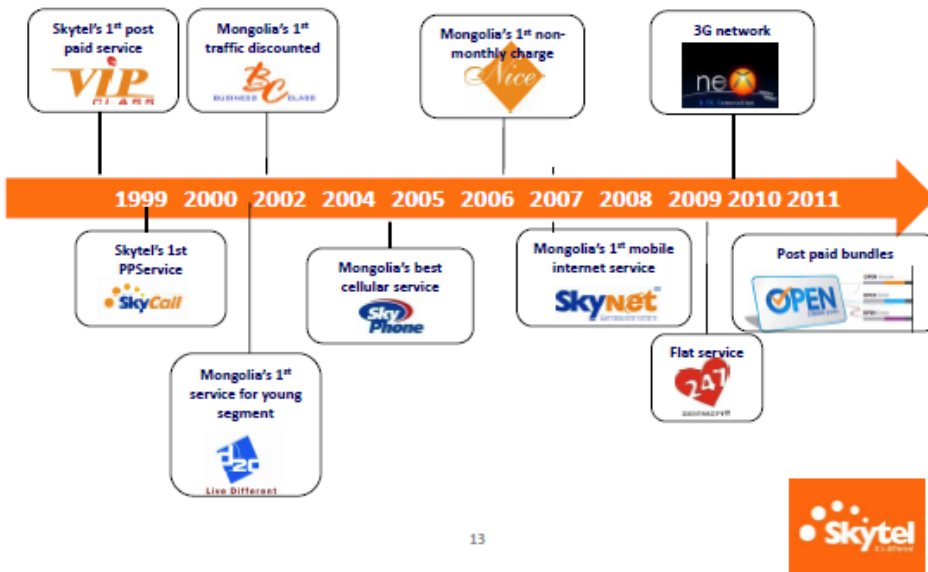


Network coverage

Sites: 254, 90% coverage



Products



13

VAS



14

Customer care

- Skilled staffs
- Comfortable environment
- Online selfcare: www.skyzone.mn
- Big number of sales points
- After sales service

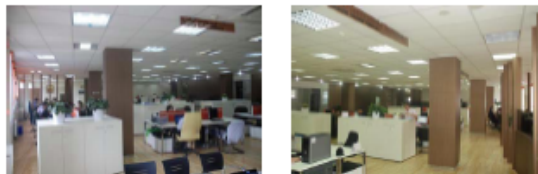


15



World-class office environment

We respect and treat well our employees as KSF for company's growth.



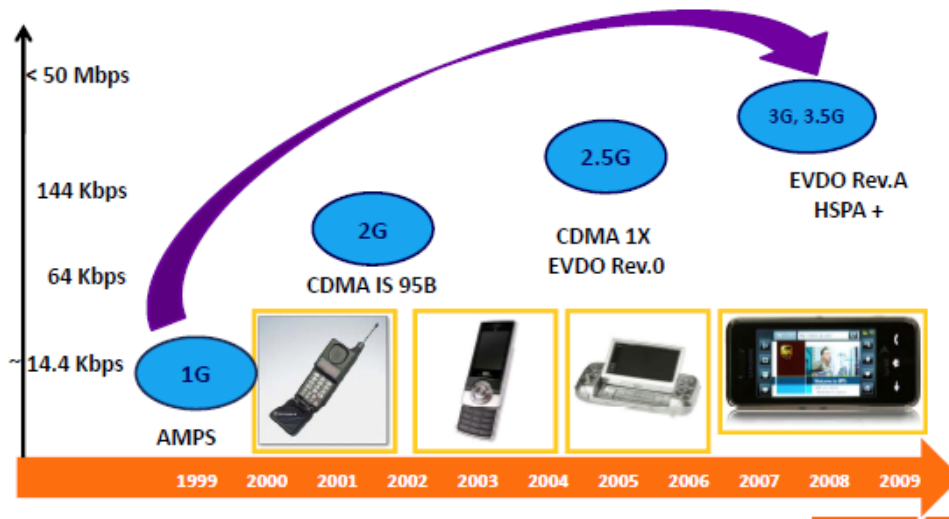
Comfortable office environment



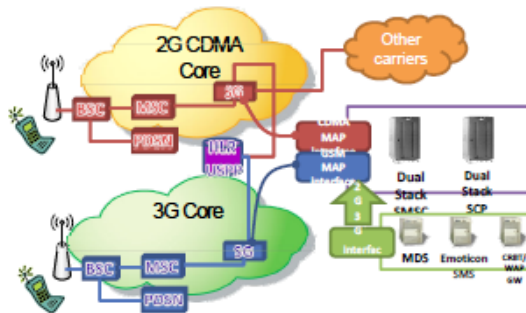
Refreshment facilities: orange café, orange fitness, SkyView terrace

16





Dual network - CDMA, HSPA+.
Cutting-edge technology

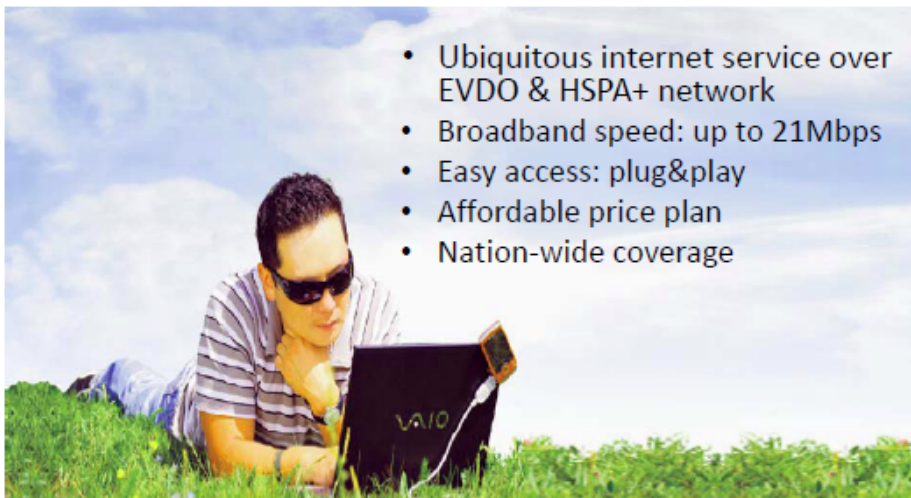


Backhaul network

- Biggest fiber optic network in UB
- 1700 km microwave transmission to western Mongolia
- 35 rural sites connected through Satellite stations



Mobile internet service



- Ubiquitous internet service over EVDO & HSPA+ network
- Broadband speed: up to 21Mbps
- Easy access: plug&play
- Affordable price plan
- Nation-wide coverage

Thank you

