



COMPETITION POLICY **IN TELECOMMUNICATIONS** **MARKET**

TELECOMMUNICATIONS POLICY AND RESOURCES MANAGEMENT BUREAU
OFFICE OF THE NATIONAL BROADCASTING AND TELECOMMUNICATIONS COMMISSION



THAILAND: COUNTRY REPORT

Income Group: Upper middle
Population: 65.93 Million
GDP per Capita: 7,770 USD



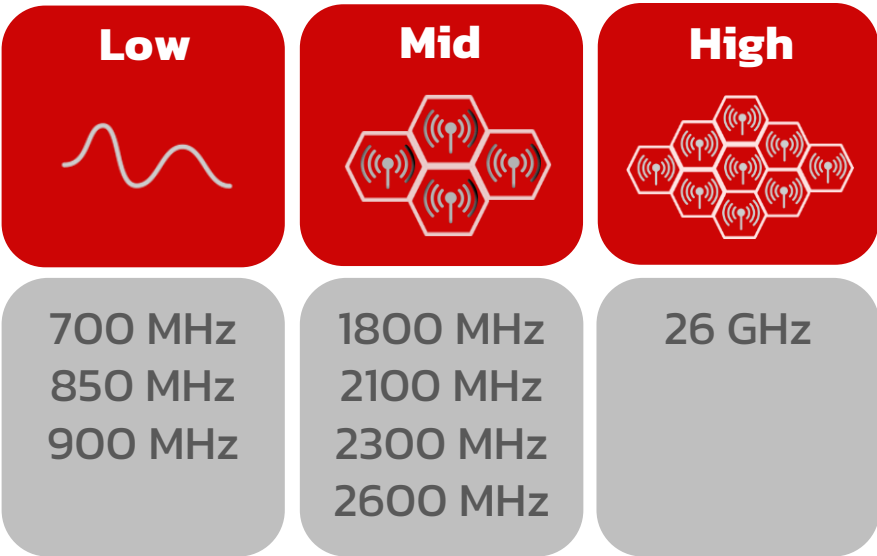
4G & 5G MOBILE COVERAGE (per population)



- 4G Network: 99.15%
- 5G Network: 91.00%

Source: NBTC (Q1/2024)

Spectrum Allocation 3,220 MHz



Source: Office of the NBTC



FBB

Speed
Download: 247.60 Mbps
Upload: 215.14 Mbps
Rank: 15 จาก 153 ประเทศ
Source: Speedtest Global Index (May 2025)



MBB

Download : 107.35 Mbps
Upload : 19.69 Mbps
Rank: 39 จาก 103 ประเทศ
Source: Speedtest Global Index (5/2024)

Affordability
Service price: 2.63% of GNI per Capita
Source: ICT Price Basket (IPB), ITU (2023)

Service price: 0.74% of GNI per Capita
Source: ICT Price Basket (IPB), ITU (2024)

Subscription
10.75 million (36.79%) household penetration
Source: NBTC (Q1/2025)
Ref: จำนวนครัวเรือนและประชากรจากกรมการปกครอง

77.30 million (117.29%)
Source: NBTC (Q1/2025)
Ref: จำนวนประชากรจากกรมการปกครอง

International Internet Bandwidth

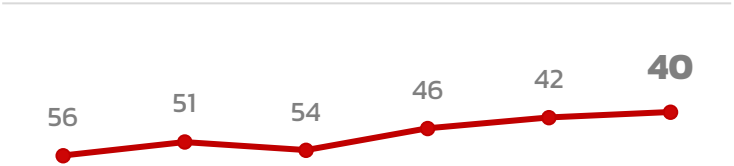


International Bandwidth
26,018 Gbps

Domestic Bandwidth
16,174 Gbps

Source: NECTEC (June 2025)

Networked Readiness Index Ranking (2024)



- 40th Rank of 133 Countries
- 3rd Rank in ASEAN
- Outstanding aspects:
 - Display strong digital capabilities/robust digital uptake by people
 - Thailand's digital ecosystem benefits from strong Mobile broadband internet traffic within the country
 - Effective digital transformation in the public sector (Government's online services)

Source: NRI 2024

COMPETITION POLICY

**AUTHORITY OF SECTOR REGULATOR
AND COMPETITION AUTHORITY**



AUTHORITY OF THE NBTC AND THE TCCT



NBTC

- The Act on Organization to Assign Radio Frequency and to Regulate the Broadcasting and Telecommunications Services B.E. 2553 (2010)
- Telecommunications Business Act B.E. 2544 (2001)

- Allocating of the radio frequencies
- Regulating the broadcasting and telecommunications services
- **Imposing rules to promote fair and free competition**
- Promoting consumer awareness and consumer protection
- Setting the standard of QoS



TCCT

- Trade Competition Act B.E. 2560 (2017)

- Regulating business operations and **impose guidelines to maintain free and fair competition**
- Enforcing competition law

Trade Competition Act B.E. 2560 (2017)

Section 4: This Act shall not apply to the operation of the followings;

- (1) Central, regional, or local administrations;
- (2) State-owned enterprises, public organizations, or other government agencies, provided that they conduct their undertakings according to the law or resolutions of the Cabinet which are necessary for the benefit of maintaining national security, public interest, the interests of society, or the provision of public utilities;
- (3) Groups of farmers, cooperatives, or cooperative groups recognized under the law and having the aim in their business operations to benefit the vocation of farming;
- (4) **Businesses that are specifically regulated under other sectoral laws having jurisdiction over competition matters.**

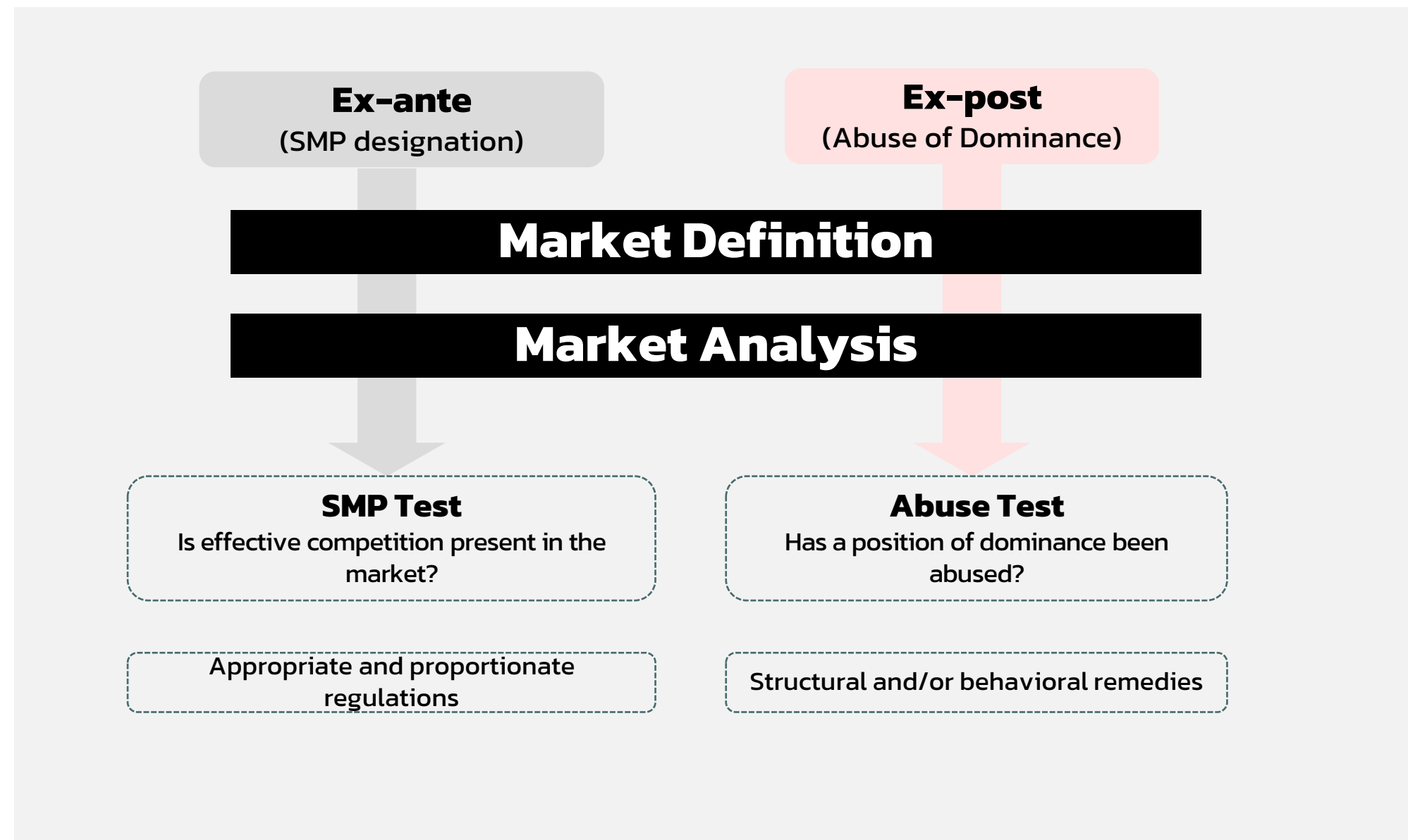
CURRENT COMPETITION REGULATION

POLICY MANDATE

- Access & Interconnection (2013)
- MVNOs (2013)
- Infrastructure sharing (2013)
- Domestic Roaming (2013)
- Right of ways (2017)

MARKET REGULATION

- Ex-ante / Ex-post Regulation
 - Anti-competitive (2006)
 - Market def. (2014)
 - Market def. no.2
 - SMP (2014)
 - M&A (2018)



CURRENT TELECOM MARKET

5 ***RETAIL MARKETS***

- **FIXED LINE**
- **MOBILE VOICE**
- **INT CALLS**
- **FIXED INTERNET**
- **MOBILE INTERNET**

9 ***WHOLESALE MARKETS***

- **INTERNATIONAL INTERNET GATEWAY**
- **INTERNATIONAL VOICE GATEWAY**
- **FIXED CALL TERMINATION***
- **MOBILE CALL TERMINATION***
- **WHOLESALE BROADBAND ACCESS***
- **MOBILE INFRASTRUCTURE SHARING**
- **MVNO**
- **MOBILE DOMESTIC ROAMING**
- **POLE AND DUCT**

* Market with SMP

REGULATION CHALLENGES

IN THE DIGITAL ENVIRONMENT



CHALLENGES

1

Authority of the sector regulator and the competition authority, and collaboration between the two authorities

2

Legal restrictions

- Separation of telecommunications and broadcasting services
- Domestic jurisdictions
- Licensing conditions

3


Market definition of the digital services, e.g., OTT



THANK YOU

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