

AIS letter opposes rivals' merger



As True and DTAC move towards a merger later this year, AIS finally voiced its opposition to the deal.

NBTC board urged to handle deal carefully

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Advanced Info Service (AIS), Thailand's biggest mobile operator by subscriber base, has written to the National Broadcasting and Telecommunications Commission (NBTC) to express opposition to the planned merger of its rivals True Corporation and Total Access Communication (DTAC), according to a source at the regulator.

The source who requested anonymity said AIS submitted the letter on March 25, urging the NBTC board to carefully handle the deal, which it said would affect consumer interest and competition.

AIS indicated the NBTC board has the legal authority to consider the merger deal, the source said.

The letter was signed by Saran Phaloprakarn, AIS's head of business development. It is the first public response by AIS to the massive merger in the telecom industry.

The source said three different

parties have submitted letters opposing the deal. They consist of political activist Srisuwan Janya; Napat Winitchaikul, a member of the committee monitoring the NBTC work performance; and AIS.

The planned merger was announced in November last year as a plan to create a new tech firm to make a foray into advanced tech, such as artificial intelligence, the cloud, the Internet of Things and space tech.

But the deal has drawn flak from academics and consumer advocates who said the move would lead to market dominance and reduce competition, with customers paying the price.

In February the NBTC approved Finansa as an independent adviser of the merger deal following a proposal by True and DTAC.

On March 17, Finansa sent its commentary report on the deal to the NBTC for consideration.

The source said an NBTC subcommittee indicated the report lacked analysis on the deal's effect on consumer benefits as well as a prediction of a possible worst-case scenario for the public and the market.

On March 29, the subcommittee instructed Finansa to review the report.

"Finansa representatives said the missing content, especially in terms of analysis of reduced competition or monopoly caused by the merger, constitutes a theory and it is impossible to predict something that has not happened," the source said.

According to Finansa's 139-page report, the merger could reduce overall mobile subscriptions to 90 million from 93 million at present, but the average revenue per user (ARPU) is likely to rise from 219 baht at present to 240 baht.

Finansa indicated Thailand's mobile market is more dynamic than others in the region in terms of competition, the source said.

Efficient competition will remain after the merger, though ARPU would slightly increase, the source said, citing Finansa's report.



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