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THE TELECOMMUNICATION INDUSTRY IN THAILAND AS POTENTIAL
MARKET FOR ABLOY OY

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The Telecommunication industry in Thailand as a potential market for Abloy Oy

Abstract
The commission company, Abloy Oy made a decision to proceed with a market research about telecommunication industry in Thailand as a potential market. The telecommunication industry is fast growing and demanding market around the world. In several Asian countries, such as in Malaysia and Singapore, government has regulated that data protection on private and public data must be secured by telecommunication providers. There are many reasons which can cost major issues and damage for connections and for data flow.
Telecommunication industry is a very sensitive area; even a small external distraction may lead to damage in services. Telecommunication companies need to protect their equipment, gated base equipment to ensure a safe and uninterrupted data flow. In this way, companies can maintain their brand image and keep their customers without causing serious financial losses.
The study concentrates on the three biggest telecommunication providers in Thailand, AIS, DTAC and TOT. These three companies are the key players in Thai telecom market. In the research, the aim was to study the current situation of the companies when it comes to locking solutions, attitudes of security, future planning on a new security solution and knowledge of Abloy Oy in Thai telecom sector.
In the study Thailand is also presented as a business environment by analyzing their macroeconomic factors through PEST Analysis. Other factors which are presented as a part of Thailand's business environment are business behavior, telecommunication industry and competitiveness environment for Abloy Oy.

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1 INTRODUCTION

1.1 Abloy Oy

Abloy Oy, the commissioning company has made decision to precede with the study on the potentiality of the Thai telecommunication industry. Abloy has multiple loyal customers from the telecommunication industry worldwide. That was one of the main reasons for Abloy to search the potentiality of telecommunication market in Thailand and especially in Professional End User sector (PEU).

Telecommunication business is a growing market and the demand is increasing around the world, especially in the fast developing Asian countries. This shows as in increased demand for the telecommunication provider companies to secure their cellular base stations. The securing centralizes on the gates, which are circling their stations and on all the different cabinets, where all the cables and power stations are located. In the case when the gates and cabinets are left without security, the damage and consequences are serious for the operators' networks and millions of people who are using them. The break downs in the systems are harmful from economic and image of the company perspectives. In several Asian countries, such as in Singapore and Malaysia, law enforces the protection of governmental and private data, meaning wholesalers and retailers must ensure that data is secured.

Abloy Oy is operating internationally in over ninety countries and the company is the global leader in the area of the door opening solutions. The company claims to create the locking solutions for customers' needs. Abloy Oy protects people, properties and business operations on land, at sea and in the air, in all circumstances with the unique design. Abloy Oy provides solutions for locking, increasing security level, making work more effective in field and makes observation to be possible. The company is a specialist in a demanding and challenging environment. The products are customized for customers' needs and to handle even extreme environment. The company is already present in telecommunication markets in several countries. Products have been tested to several international standards and customer-specific standards for high security.

Abloy Oy describes that they have a clear mission and vision. The vision of the company is that being in control of one's life and surroundings is basic human need. The mission is to make life easier and more controllable by creating locking solutions that adapt to change and works as expected, even in exceptional situations.

Abloy Oy is part of the ASSA ABLOY Group concern, the main office is located in Sweden, which is ranked in Stockholm stock exchange in Sweden. The first locking solution was created in 1907 by Emil Henriksson, who was an office machinery mechanic. He invented the detainer disc locking cylinder, a locking solution, which offers unique features. The company was established in 1918, when the first factory was built to manufacture these innovative keys and locks. This invention is foundation of continuously developing locking solutions and door opening mechanisms. Nowadays, Abloy Oy has approximately 850 employees in Finland in two factories, Joensuu and Björkbo. In foreign sales units Abloy Oy employs approximately 80 persons. (Abloy Oy, 2015)

Abloy Oy has seven different business units, which are responsible for manufacturing of different products. These seven units are Network Solutions, Construction Locking, Industrial Locking, Electric Locks, Door Control, Architectural Hardware and Mechanical Lock Cases. The units operate independently, these are responsible areas of their own product development and manufacturing.

In the domestic market Abloy's products are well known and respected, among both private and professional end-users. Abloy has developed the strong brand awareness at domestic market, but also around of the world ABLOY brand is stabilizing. (Abloy Oy, 2015)

Abloy Oy has gained a great position not only in the domestic, but also the international markets. Abloy Oy has established a number of new sales units and companies during the last past years. Some of these sales units are under of the Abloy Oy brand, rest of those are established under the ASSA ABLOY's as Abloy sales units. Abloy's own sales units are located in China, India, Singapore, Great-Britannia, South Africa, Mexico, Italy, Spain, France, Colombia, Baltic, Turkey, Russia and South East Asia.

Abloy Oy sales companies are established and owned by Abloy Oy. Abloy Oy has overall responsibility for the operations and the companies are reporting directly to the main office in Finland. Abloy Oy's sales units are not a separate companies, but serves under a local ASSA

ABLOY's as a business unit. These units report directly to Abloy Oy to Finland or makes also reporting to the local ASSA ABLOY. If Abloy Oy does not have its own private importer, sales unit or either company, ASSA ABLOY can work as ABLOY products' distributor.

The ASSA ABLOY Group has a global market share of over ten percent. The company has a few strong competitors and manufacturer in United States of America and Europe. These competitors are the strongest players on their domestic markets, they have also international presence, but it is only limited operations. The Asian market is still very fragmented, even the largest manufacturers have modest market shares. Although some consolidation has taken place over the past decade, the security industry is still fragmented in a global perspective. Some countries have one strong manufacturer with a large share of the local market. (ASSA ABLOY, 2015)

1.2 Aim of the study

The aim of the study is search through out a market research of the potential market, which is Thai telecommunication industry. The research centralizes on the three big telecoms, current security solutions and future plans and Thailand as a business environment.

Aim of the thesis is divided into three main categories, which are mentioned below.

1. Explore Thailand as a potential market and find possible future customers from telecommunication industry in Thailand for Abloy Oy.
2. Search attitudes of security and locking solutions in telecommunication industry in Thailand among the biggest Thai telecommunication companies.
3. Find the contact information of the potential customers and create background information of current situation and potentiality of the telecom market in Thailand from security perspective.

1.3 Outline of the project

In the theoretical tools section, Business to business (B2B) literature and market research will be considered first. Secondly, the effect of culture is a major aspect of the study case, both in theoretical and practical level, this is the reason why culture aspects are considered also in the theoretical section. The section will act as a theoretical foundation for the practical section. Business to business and the market research are taken from international perspective and these theories will be highlighted.

The practical section starts within the methodology of the study. The methodology section of the thesis is presenting detailed information of the research process of the potential new customers from telecommunication industry in Thailand. As a research method has been used survey. Main goals of the survey are to find out potential new customers, their attitudes of security and knowledge level of Abloy Oy. Also current situation in security sector in telecommunication industry and aspects, which might be affecting into future decision making of the new security solution wanted to be found out.

The following section is about the potential target country, which will be provided in the form of a PEST analysis. The section will provide information of business culture in Thailand, Thai telecommunication industry and possible competitors of Abloy Oy. The section gives information of Thailand as a business environment.

Finally, the last parts of the thesis are analysis based on primary data, which were collected through the survey. It follows conclusions and recommendations based on results what might be the next step in the future of Abloy Oy. Also, the current situation in security sector in telecom industry and aspects, which might be affecting into future decision making of the new security solution, were to be found out.

The following section is about the potential target country, which will be provided in the form of a PEST analysis. The section will provide information of business culture in Thailand, Thai telecommunication industry and possible competitors for Abloy Oy. The section gives information on Thailand as a business environment.

Finally, the last part of the thesis is the analysis based on primary data, which were collected throughout the survey. The analysis is followed with conclusion and recommendations based on results showing what might be the next steps in the future for Abloy Oy.

2 THEORETICAL TOOLS

2.1. Business to business (B2B) concept

Business to business (B2B) concept is based on Jobber and Lancaster's written literature. Business to business (B2B) markets are often characterized as large and powerful, even though the number of the customers is small. The demand in B2B markets is derived, customers are often geographically conserved and negotiations is between marketer and customer. The customers are usually skilled professional buyers in organizational level. B2B is a transaction between two companies or organizations and buyer behavior is different from the consumer behavior. In B2B markets long-term relationships with customers are valued.

Marketing and sales processes in these markets differs from the business to customer (B2C) markets. In B2B marketing the number of the customers is less than in B2C markets, but the size of single purchases is usually larger. The buying process is systematic, as buyers are professionals. The process is well planned and considered more carefully, it can take a long time, months or even years, to close deals.

In B2B it is common to agree on highly customized products. Some customers have specific requirements and the companies are willing to meet their customers' needs, especially when the sales volume is high. The organizational buying decisions are more rational, since decisions need to be justified to other members in the organization. The organizational buying and selling is a complex, requires planning and adjustments. (Jobber & Lancaster 2003, 10-11.)

2.1.1 The marketing mix in B2B

Marketing mix in B2B markets is continuing of the earlier paragraph of the literature of Jobber and Lancaster. The B2B markets vary as there are several types of them and the marketing used in every

single one of them can vary even inside the types depending on the company structure of the industry and the B2B markets.

In B2B markets buyer frequently choose product on its' technical specifications. Products should be customized to individual requirements with quality assurance and after service possibilities including technical support, which plays an important role creating long-term relationships and reliability with customer. The augmented product, which holds the additional customer value, is in key position in B2B markets.

The promotional element of the marketing mix in the B2B markets is likely to be placed on personal selling as opposed to the advertising elements. In B2B markets and especially marketing to distributors, sales promotions are used extensively like in business to consumer markets (B2C). Publicity is valuable promotion tool, for example mailing, but the message should be individualized for customers' needs.

Price is major factor in the B2B markets, it would be mistake to assume that all the customers in this type of the markets would buy only with one price. As in consumer markets, price is the key factor, but likely it is going to be negotiated with the potential professional buyers.

In the B2B markets, distribution is often direct and the logistics are particularly important. In B2B markets speed and reliability of the delivery are vital and important aspects to remember. Flexibility of manufacturing system in purchasing and production emphasizes the reliability between two organizations or companies. (Jobber & Lancaster 2003, 22-40.)

A functional long-term relationship consists of all these four aspects, product, price, place and promotion, as they all works a part of consumer orientation.



Picture 1. B2B Marketing mix (Emineo Media, 2014)

2.1.2 B2B oriented organizational buyer behavior

To understand organizational buying process has to be aware that buyer or purchasers' offer is not only authority that is influencing to the decision. Usually there is a decision-making unit (DMU) or a buying center, which is behind the decisions of buying processes. A managing director can be involved into process that new equipment should be purchased, but may not be deciding from which manufacturer to buy it from. (Jobber & Lancaster 2003, 92-106.)

The organizational buyer behavior refers to the choice of criteria used by members of the DMU to evaluate supplier proposal. Thus a purchasing manager who is judge of the extent to which they reduce purchase expenditure is likely to be more cost-conscious than production engineer who is evaluated in terms of the technical efficiency of the production processes they design. The organizational buyer is characterized by both functional (economic) and psychological (emotive) criteria. Key functional considerations for plant and equipment may return on investment, while for materials and component parts might be cost savings, together with delivery reliability quality and

technical assistance. A key concern of many purchasing departments is the long-term development of the organization's supply system. Psychological factors may also be important, particularly when suppliers' product offerings are essentially similar. In this situation the final decision may base on relation and character of the suppliers' salesperson. (Jobber & Lancaster 2003, 92-106.)

2.2 Elements of market research

Elements of market research are based on Kotler's literature, *Principles of Marketing*, published in the year of 2008. Market research is a method to get overview information about consumer behavior, needs and wants, in a specific market or a country. It is foundation and quittance to find the best way to market and develop product or service in that exact market. The marketplace elements are very important to understand, which are customers, competitors, products and marketing programs. Also changing environments has to take under the consideration in market research.

Primary and secondary researches are two major market research methods. The primary method is divided into two sub-groups, quantitative and qualitative methods. Usually a research starts from gathering secondary data. The internal databases provide a good start for the companies. Also, other secondary data sources, external information, which is including governmental sources, paid reports and commercial data services. However, in the most of the research cases company needs to collect primary data beside the secondary data. The collection of both of the data types, have to be carefully evaluated by the quality and the relevance of the information.

Contemporary research approaches for gathering primary data include observation, survey and experiments. In this the used approach has been a survey research, which was conducted by gathering primary data by asking people questions considering their attitudes, knowledge level, preferences and buying behavior. Surveys are the most widely and commonly used method for collecting primary data, as it is the best suited approach for gathering descriptive information. The advantage of survey research is its flexibility, as it can be used to obtain many forms of information for many situations.

Information can be collected in many different forms, such as by telephone, personal interview or online. Every contacting method has its' advantages, but disadvantages as well. Issues may form when the method used is time consuming, also the reliability of responses or number of samples may be a problem. In this research the contacting methods were phone calls and e-mail.

A sample is a segment of the population selected for market research to represent the population as a whole. In Abloy Oy case, the focus group was decided beforehand (professional consumers from the specific industry). Focus group means a small sample of typical consumers under the direction of a group leader who elicits their reaction to a stimulus such as an ad or product concept.

The market research plan needs to be put into action. This involves actual data collection, processing and analyzing information. Analyzing collected data to isolate important information and findings. Analyses may include statistical analyses and analytical models to learn and understand more relationship within set of data.

After analyzing primary data, the next step will interpreting and reporting the findings. This part should be done by researcher. The researcher should not use difficult and confusing tables or fancy statistics techniques presenting results to Commission Company or managers of the company, but rather stay in simple and clear presentation. The most important information that is useful in major decisions should be presented in the findings.

The most of the market research benefits both, the company and its consumers. Throughout market research, companies learn more about market area and consumers' needs. This information is helpful in order to develop the existing products, services and helps to build stronger customer relationships. However, there can be negative impact of markets research, when implemented poorly, it can harm and annoy customers relations as well. (Kotler 2008, 325-347.)

2.2.1 International market research in B2B context

International market research follows the same steps than domestic research, starting from defining a problem, developing s research plan to interpreting and finally ends by reporting the results. However, in international research people are often facing more and the type of problems can be

different. International market researchers are dealing with diverse markets in many different countries, and for instance, these markets often vary in their levels of economic development and cultures. (Kotler 2008, 347-348.)

In foreign market research, research may have difficulties to find reliable secondary data. Researchers can use domestic research services, but the most of the research companies operate only in a relative handful of countries. Even though, secondary information is available, it must be obtained from many different sources on a country-by-country basis. Because of the lack of reliable secondary data, international market researchers usually need to collect their own primary data. (Kotler 2008, 347-348.)

Cultural differences cause additional problems for international market research. Language is the most obvious obstacle. A good example is that when creating a questionnaire, it must be translated into the language of each country which are to be researched. The responses must be translated back into original language for analysis, which might occur in increase in the research costs and as an increased risk of error. The environment can be challenge for the researcher. In slowly developing countries, method of collecting responses trough out a questionnaire needs to be chosen carefully as the illiteracy rates in the chosen country might not be functional (Kotler 2008, 347-348.)

2.2.2 PEST Analysis as a research tool

The PEST analysis is a concept in principles of marketing. Moreover, this concept is used as a tool to provide information of the environment of the potential market. It is used when a company operates in or is planning to launch a new project or service into that market. The PEST analysis is form of political, economic, social and technological aspects of the market or a country. It gives overview information of the whole environment from the many different angles. Into framework can be added certain aspects, such as legislation of the industry, which can be a major effect into business or elements of environment. (PestleAnalysis, 2015)

There are certain questions that one needs to get answers while conducting macro-economic analysis like PEST. Those questions are mentioned below:

- What is the political situation of the country, how can it affect the industry?
- What are the prevalent economic factors?
- How much importance does culture has in the market and what are its determinants?
- Are there any current legislations that regulate the industry and can there be any change in the legislations for the industry?
- What are the environmental concerns for the industry? (PestleAnalysis, 2015)

2.2.3 Quantitative research as a data collection tool

Researchers usually start their work with secondary data collection. The secondary data is already existing information, which is collected for another purpose by origin. This is why the secondary data may not give answers to research questions directly. In the most research cases, the researcher needs to collect own primary data beside the secondary data to get relevant, accurate and current information.

The research approach for gathering primary data includes observation, survey and experiments. The survey as a research tool is used to gather primary data by asking questions from people about their knowledge, attitudes, preferences and buying behavior, and it is the most common tool to do research (Kotler 2008, 335-337.)

The quantitative research is a more logical and data-led approach than qualitative approach. It provides a measure of what people think from a statistical and numerical point of view. Quantitative research largely uses methods such as questionnaires and surveys with set of questions. This form of research is very flexible in terms of how it is carried out, such as through the post, online or even over the phone. Carrying out quantitative research, it has to make sure that there are a fair cross section of respondents and that there are enough of answers to provide a greater range of reliable data. (The British Library Board, 2015)

2.3 Cultural aspects in decision making

Culture includes both, the abstract and material elements. Abstract elements are values, attitudes and religion; these are learned patterns of behavior that are transmitted from generation to another. Material elements of the culture include the level and types of technology and consumption patterns within a society. Salespeople need to understand the culture functions in a specific country, so that the sales approaches can be tailored accordingly, especially the values and cultural factors, which are influencing in business world as well. (Jobber & Lancaster 2003, 167-183.)

The aspects, which should be taken under consideration are: aesthetics, religion, education, language, politics, cultural attitudes and values. These aspects may influence into every part of the business cycle, from the first contact to the delivering final product and all the way continuing to a long-term relationship. (Jobber & Lancaster 2003, 167-183.)

Aesthetics should be considered in logistics, i.e. colors and packaging, especially in Asian countries colors play a big role and the different colors have different meaning. As mentioned before colors have to be chosen carefully. Also making sure what meaning different symbols imply in the target country, is important to avoid misunderstandings. The same applies with language as it is an important part of the culture, if the company is not familiar with deeper meanings make sure that at least the name of the company is checked and you are familiar with its meaning, if there is one. The religion, in this case the major religion is Buddhism, adaptation in the religion is important and there should be a higher understanding how the religion is affecting in the business environment. In a business environment where the people may not be highly educated, the company should meet the educational level and its skills in the particular culture. It follows language, which is a very important part of the culture. The skill level in foreign languages in the business environment may be poor, and clear communication should be taken care of with a third person, with an interpreter, if needed. With language it is also very important to remember the same aspects as with the aesthetics. Political factors, government legislation, politics and economic situation may affect the companies, and it is important to be aware of the current situation in the country, as there can be an impact on overseas sales strategy. Different concepts of time values, business deadlines, own space, physical contacts and hierarchy are part of the culture, should be considered and be aware of, again to avoid misunderstanding. (Jobber & Lancaster 2003, 167-183.)

More about Thailand, Thai culture and Thailand as a business environment will be presented in the following section.

2.4 Theoretical framework

Abloy Oy has mainly Professional End Users (PEU) as customers in Asian countries, but there are exceptions in consumer markets, which have been negotiated and these have been special cases. Because of current situation, theory of B2B markets has gone through important aspects, which should be remembered in case of telecommunication industry as potential market area in Thailand.

Since, Abloy Oy is focusing on B2B markets, customers will be companies or organizations and buying behavior defers from individual consumer behavior. By understanding behavior inside the organization it helps to focus in the key factors in the sales process. Usually products and services are customized for customers' needs in B2B markets. Abloy Oy has experience on professional end users and expertise of customize its' products for customers' needs and wants even in challenging environment.

Whole project started with a market research. The market research was made in two parts. The first was the overview research about the telecommunication industry worldwide, gathering general information of the industry and the importance of telecommunication that it holds currently. The second research part was about market area, Thailand, this part considered more about telecommunication industry in Thailand, main operators, competition etc. Also business culture is analyzed and Thailand as a business environment is considered with the form of PEST analysis later on in this report.

The most important part of the theoretical framework is culture. Thai culture differs from Finnish culture a lot and it should be studied well in advance. There are five dimensions, which can be affecting to business to business (B2B) strategies when dealing with Thai partner and these dimensions are: personal relationships, long-term business relationships, inter-organizational trust, ability to communicate in the English language and western influence. It is important for the company to understand and try to adopt their B2B strategies into the cultural context. But there are not such the big differences between B2B and business to consumer (B2C) sectors from cultural point of view. Thai culture is affecting strongly to business environment in Thailand. There are many aspects, which has to take under the consideration and be careful with. Understanding and respecting culture might be the key factor to success in Thailand and for creating strong successful long-term relationships.

3 METHODOLOGY

3.1 The Research Questions

The main goal of the study was to search potentiality of telecommunication industry in Thailand for Abloy Oy. Answers to these questions were mainly reached throughout the security survey and the market research, using primary and secondary data gathered throughout quantitative research. The research questions were as follows:

1. Who are the key players in telecommunication industry in Thailand?
2. What are the key players' attitudes of security and locking solutions, and future plans regarding on security solutions?

3.2 Methods

For the thesis, both, primary and secondary data were used. At first secondary data was considered, as information and relevant tools are based on gathering the data from literature and from the Internet. The practical work was done and based on this information. Secondary data is used to find answer to the first research question and primary data is foundation for the research question number two.

The theories, which have been used in this study case, have been mentioned and opened up earlier in this report, in the section 'Theoretical tools'. The most relevant theories are the tools in market research and understanding the B2B markets, mainly organizational behavior in decision making situations. The theories are foundation for the practical work, which has been implemented into practice and applying information in study case. Knowledge is based on secondary data, which is gathered from literature and spoken discussions by commission company throughout face-to-face meetings. The first step was to get knowledge and information about theories and tools after the

market research was done on the target market and country (telecommunication industry in Thailand).

A survey was chosen as a quantitative research method to find out current situation in Thai telecom market. The questionnaire was made with quittance of Commission Company (see Appendix 2). At first was discussed and decided what information is needed and from those discussions the final type and the questions were designed to answer the needs. The target group was bordered. It was made mainly by phone calls in Thai.

Because of the possibility of language barriers and cultural differences existed, it was needed to take it into closer consideration. It was decided that a local contact person was needed. The contact person could help and do translations if any problems occurred during the process. The contact person played a key role in Thailand during the actual research process. Language barriers, as predicted, were faced and the person was really important in contacting the telecommunication companies. Contact information was provided for making contacts before phone calls and e-mails.

The survey was made in practice mainly by direct phone calls and secondly thorough e-mailing. The contact information was gathered using secondary data, which was the Internet. The contact information was provided beforehand for contact person.

The results from the survey were collected during the March in 2015. The results are presented and analyzed in the following section.

4 TELECOMMUNICATION INDUSTRY IN THAILAND

4.1 Abloy South East Asia

Abloy South East (SE) Asia is a business unit of Abloy Oy located in Singapore, it is functioning as the regional headquarter providing support for the sales, marketing and logistics for the region. Abloy South East unit is represented in the regional countries by a strong network of ASEAN distributors. ASSA ABLOY has been offering their solutions in Thai market over ten years. It has become one of the most premium well-known lock brands in Thailand due to its technical performance along with product's prestige design. Abloy SEA has its own exclusive distributors in every country in Asia, in Thailand it is Titanco International Co. Ltd. (ASSA ABLOY, 2015)

Abloy Oy has been operating in Thailand already over ten years. Nowadays, Abloy Oy is focused into three main customer groups in Thailand. Firstly, the educational and health care sector, secondly the commercial and institutional high-end projects and thirdly in the professional end-users (PEU) and original equipment manufacturers (OEM). Abloy Oy has business to business (B2B) model in Asia. Business to customer (B2C,) has been put on the side and the company is focusing on the above-mentioned segments (Abloy Oy, 2015). Already existing customer in Thailand are from PEU sector. Telecommunication companies are included into professional end-user sector.



Picture 2 Abloy South East Asia (SEA) (Abloy, 2015)

4.2 Thailand as a Business Environment

Thailand as a business environment in this paper is analyzed through PEST analysis. The analysis is made from company perspective, including aspects, which are related on and have an effect on the case which is presented as it follows. Also this section includes aspects on legislation of Thai telecommunication industry.

Population of Thailand is 67.7 million (2015) people in 513 square kilometer large country. People are mainly living surroundings of the big cities, such as in capital city Bangkok. The main religion in Thailand is Buddhism, which covers almost 95 percentage of population, second large religion is Islam. The official language is Thai. In Thailand there are living many nationalities from neighbor countries, mainly from Burma, Laos and Cambodia. As a currency in Thailand is used Thai baht, one euro is approximately forty Thai baht. Total gross domestic product (GDP) is approximately 295 billion euros in year 2014 (CIA Factbook).

Political

A unified Thai Kingdom was established in the middle 14th century, the Kingdom was known as Siam until 1939. Thailand has faced many revolutions and wars during its' long history. Since 2005 Thailand has experienced several political turmoil's, which were including for example a military coup in the year 2006 when The Prime Minister Thaksin Chinnawat was ousted. After that followed larger scale protests. The latest protest was started in November in 2013, when Thai people involved in street protest. The latest protest was about political crimes and convictions against the prime minister, it was a large-scale anti-government protest.

Thailand is politically instable and has had to deal with a series of anti-government protests during past years. This instability is proving to be the major threat to business environment. These political aspects are effecting not only for locals' lives, but also into businesses in many sector. Even though, insecure is shown especially in individual level, but also organizations are facing similar issues only in different level.

Economic

Thailand has recovered from internal and external economic shock in recent years. The global economic recession severely cuts Thailand's exports with the most sectors experiencing double-digit drops. Economy of Thailand is well developing. The country has achieved steady growth due largely to industrial and agriculture exports, mostly in electronics, agricultural commodities and automobiles.

Unemployment is less than one percentage, it is one of the lowest in the world. In Thailand are nearly 2.5 million migrant workers from neighbor countries. The government of Thailand implemented a nation-wide wage policy of three hundred Thai baht per day, which is around eight euros, as a minimum wage and a new tax reforms for low and middle-income earners.

Since Thai economic is growing and developing, it has not reached a stable place yet. Ongoing political unrest situation is effecting on economic and it complicate government to be functional. Nevertheless, situation is developing forward to reaching better position and issues are under the progress. The improvements in economic area mean more money to spend for individuals and for the companies have higher revenue to be spent and more money to spend and invest.

In Thailand corruption is rampant. In the business world money and relationships are in important role in Thailand. The country is ranked 90th place corrupted country in the world of the 175 countries in year 2014 by Transparency International.

Social

The rapidly growing economy around Bangkok is marginalized the country's less developed regions. In addition, the country faces significant income inequality. The average wage level of employees participating in the private and public sectors in the northeast Thailand are around three times lower than in surround Bangkok area and twice as low as those in the central region. The previous Prime Minister of Thailand Yingluck Shinawatra aims to provide solutions to the menace of drugs, prevent and corruption by raising the standard of living of the Thai people by increasing wages in private and public sector and relieving taxation. The development of the health insurance system was part of increasing of living standards in Thailand. By taking care of these aspects the social security is expected to develop.

Even though, the social security is developing to better direction, there is insecurity among Thais. Political situation is one of the reasons for insecure feelings, but immigrants from neighbor countries are other reason for this. For instance labor force from Burma is considered as a reason for violence attacks and criminal behavior. And the significant problem in Thailand is forced labor and sex trafficking and the most often victims are coming from neighbor countries especially from Burma, but also from other countries as well.

Technological

Thailand is technologically rapidly growing country. Telephone systems are high quality, especially surrounding of Bangkok areas and wireless services are expanding rapidly. Fixed line systems are provided by both a government owned and commercial providers. Thailand is connected to major submarine cable system, which is providing links trough out to Asia, Australia, Middle East, Europe and United States of America.

The main telephone lines are used by 6.4 million people and mobile cellular users reaches 84.1 million people (CIA Factbook, 2012). Number of Internet users is reaching 17.5 million people in Thailand (CIA Factbook, 2012).

In Bangkok, there are six terrestrial television stations broadcast nationally via relay stations. Two of the networks are owned by military and the other four are owned and controlled by private enterprises.

4.3 Business corruption

Thailand has the legal framework and a range of institutions to effectively counter corruption, all levels of Thai society continue to suffer from corruption. Despite publicly was pledging to combat corruption within the procurement and contracting sector to improve transparency in the bidding processes and rewarding of contracts. The former Prime Minister Yingluck Shinatwatra's government itself became implicated in a corruption-plagued rice-pledging scheme, significantly undermining its anti-corruption claims, it was a reason that he was forced to step-down over the

allegations. Now a day, Thailand is under the rule of the military, which says it has taken control of the country to restore order and to enact political reforms.

Even though in Thailand there is regulatory to avoid corruption, conflicts of interest are common within Thailand's private and public sectors. In addition, facilitation payments are common in the most sectors, but are particularly widespread in the intersection between business and government. The main source of corruption in Thailand is considered to be money politics, the flow of money within the political scenes and stemming from the high degree of interconnectedness between the business sector and the political system. The government has effectively implemented anti-corruption laws to mitigate these obstacles. However, the country still suffers from an ineffective government bureaucracy.

4.4 Business Culture in Thailand

Building a relationship with partner is an important factor of doing business successfully in Thailand. In Thailand social engagement plays an important role in the ways of developing trust. The contacts related on business are considered more important factor and therefore presenting and maintaining a good profile is often very important to Thai people. The company, which is cooperating with Thai company should keep same person working with a specific partners as it is essential. It also requires that regular detailed briefings are conducted with other colleagues in case, if person changes a position or leaves from the company. Hierarchy is an important aspect as well. In Thailand business people will most likely expect to meet representative of similar position in business meetings, not from lower position.

The Royal Family is highly respected in Thailand and showing the respect for them is highly recommended, i.e. talking only positive way about Royal Family. No stepping over the money is accepted, as it is considered as same if person would step over The King. Furthermore, a head is private, so it is untouchable area also pointing anything with feet is considered very rude.

Western people are seen as powerful persons especially in business environment. Thais' attitudes of western business people are positive and highly respected. Usually in European countries people are putted on same level, it does not matter where person is from, but mainly skills tells more about

level of the power and respect for this person. Among Thais, skin-color tells about the education and skill level, but in Thailand western and light skin colored people are respected more than locals.

Anyways, it does not matter how important business is, family and the spiritual things comes always first.

First Contact

It is important to be prepared for a first visit by reading on business practices, negotiations style and other relevant information of culture and behavior. This will help to be confident and successful in the first meeting, without the major conflicts.

Greetings

Thai people do not use a traditional hand shake. The formal way for a greeting is a wai, which is performed by placing the palms of the hands together, raising them to the face with the fingertips at eye level and inclining the head slightly. Foreign business people are not expected to know or use the wai, a simple smile and a nod of acknowledgement is acceptable. In future it may be appropriate to return the wai, when relationship is stronger and traditions have become more familiar.

Presenting yourself

The most Thais have a nickname, which they are using in place of the given name. When corresponding, it is important to use the correct given name. Khun, to be pronounced "koon" is Thai for Mr., Mrs., Ms. or Miss and the given name following. But this is not necessary in casual conversation, if you have been introduced by the nickname. Business cards are very usual and it is part of presenting yourself, preferably with a Thai language version printed on one side of the card and English version on the other side.

Business Relations

Thais are an extremely tolerant and forgiving people, but it is really important to avoid embarrassment and misunderstandings. In Thailand, business relationships are based in close

personal relationships, respect for status, patience and not losing face are values very appreciate in Thai culture.

Gifts

Exchanging gifts is a regular practice in business in particular on first visits in many countries, as well in Thailand. Gifts do not need to be expensive, but a kind gesture that may help to build a strong relationship with the partner. Gifts are not opened when received, later on in privacy.

Business Communication

Between Thai and foreign business acts English language is often used or participants are using translators to understand each other's message.

Thais would often not admit, if they do not understand what has been said in order not to offend their foreign visitors. This is a factor, which can create frustration and ultimately deteriorate in business relationship. Foreign business people may leave from a meeting thinking they have reached an agreement only to realize that nothing further happens, because of the Thai person is unable to say no. The use of an interpreter to ensure that a good communication takes place is therefore important.

Dress Code

Thai people value systems of regarding dress, social behavior, religion, authority figures, they are much more conservative than the average of Westerner people. In business Thai people tend to follow a formal dress code. Casual wear should not be worn for business meetings, a business shirt, tie and proper footwear is essential for men. Remove your shoes when entering in a home or in a temple.

4.5 Telecommunication Sector in Thailand

Telecommunication service industry is growing business area in around of the world. The industry is facing significant challenges in competition, technological revamps at very short frequencies and

never-ending consumer demands. Even though in a high competitive environment, the companies should be considered different innovative marketing solutions and advantage of the technology. However, telecommunication industry is becoming more revolving surround of customer relationships than technology aspects. Customers' satisfaction plays a bigger role in the market and it will be a key to be a successful in a fast growing industry. Abloy Oy has already noticed this industry is a potential area for conquer. The company is operating in telecommunication industry around of the world and a goal is to enter in Asian telecommunication industry.

The Internet access obtained in Thailand in the year of 1996, it was a third country in South East Asia. Since then, Internet usage has become more popular in the cities and more accessible around of the cities. About nine million people are using Internet every single day and 24 million people have a regular access in Internet in Thailand, this is representing over third of the population of Thailand. Broadband Internet is available in the major cities and towns, but still in smaller villages and countryside connection in bad condition or it does not exist yet.

The majority of the Broadband Internet accesses are by the Asymmetric Digital Subscriber Line (ADSL) and other areas are covered by Cable Modems and Single-pair high-speed digital subscriber lines. Medium and large businesses are using Leased Lines or Ethernet Internet, when fiber optic cables are linked to many office buildings in the central business district areas.

The main and the basic telecommunication services in Thailand are provided by Telephone Organization of Thailand (TOT) and Communications Authority of Thailand (CAT). These two organizations established as governmental agencies to a monopoly in the telecommunication industry. Responsibilities were divided between these two companies, TOT was responsible for domestic services and CAT was responsible about international services. The companies have been privatized and they are competing in nearly every area of the telecommunication industry in Thailand. The government of Thailand has removed regulatory responsibilities from TOT and CAT to National Broadcasting and Telecommunication Commission (NBTC) in 2010.

4.5.1 Legislation in Telecommunication Sector

The most countries have their own telecommunications agencies, which are enforcing telecommunication regulations formulated by their government. Thai telecommunication authority is trying to reform the rules and regulations of telecommunication industry of their own. Unfortunately, the authority is still constructing constraints to the operators and this becomes an obstacle for development of the telecommunication industry. In addition, the regulators are not independent from the government.

Regulations are aimed to provide market conditions in favor of the small players in order to allow them stand up and increase their competitiveness in the market. It is grounded on an assumption that the dominant player is too gigantic for any new entrant to deal with its nature of monopoly.

Before year 2010, regulatory responsibilities were divided between two organizations, Telephone Organization of Thailand (TOT) and Communications Authority of Thailand (CAT), but government made a decision of a change. National Broadcasting and Telecommunications Commission (NBTC) was established in December 2010 to take care of a single converged regulator for the telecommunication and broadcasting sectors in Thailand.

The Telecommunications Business Act of 2001 made the new rules for telecommunications industry in Thailand by requiring telecom operators to obtain a license from the National Broadcasting and Telecommunications Commission (NBTC). The Act classifies telecommunication licenses into three categories:

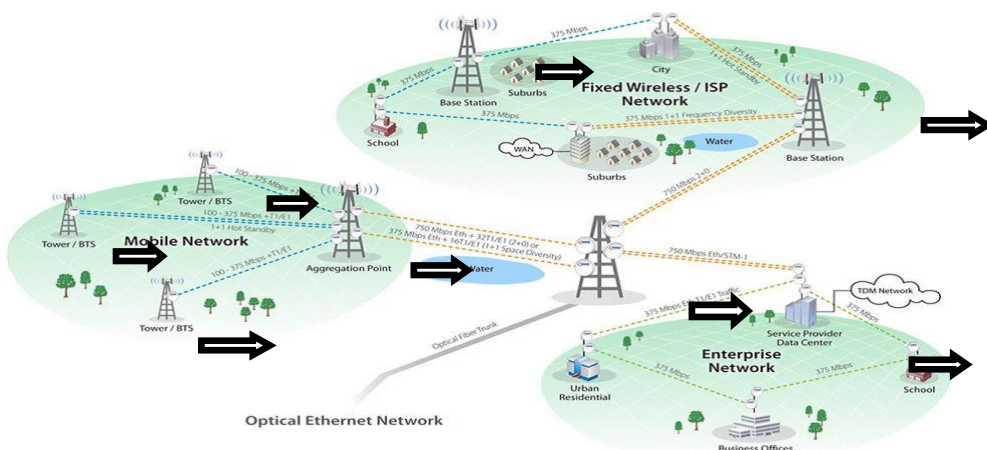
- 1) Telecommunication license is for an operator without its own network.
- 2) Telecommunication license is for an operator with or without its own network but provides services targeting a segment or even several segments of the public.
- 3) Telecommunication license is for an operator with a network that provides services to the general public.

4.5.2 Abloy Oy in telecommunication industry

Telecommunication industry is facing significant problems regarding on safety and security. Telecommunication service providers need to have ability to deliver their services around a clock every single day. Any break down or interruption in services may cost major loose in financial sector, but as well reputation can be ruined. The need of high security solutions has become an essential requirement.

Telecommunication industry is fast growing market. Character of industry is dynamic and competitive. The major issues in the market are physical attack to include vandalism and theft or civil disobedience, these can cause break downs and costs in other areas. The varying methods of providing communication can include landlines, satellites, cables, mobile –and radio telephone networks. The applications are including headquarters, network buildings, data and media centers, base stations, gates and equipment cabinets, masts, climb hatches etc.

A picture 3 “Telecommunication” billow shows an example of a simple telecommunication model in a city area. The simplest way telecommunication is network between transmitter and receiver. Usually base stations, cellular stations and different cabinets are circled by gates. In picture 3 one can see the black arrows, which are symbolizing places need to secure from for instance vandalism or any outside factors, which can damage network flow or consequence is a breakdown of the system. There is hundreds of gated cabinet and base stations to secure under the one big telecommunication operator company. If in one gated area is needed for example ten locks and there is hundred gated areas to secure, it means thousands of locks are needed for the one telecom company to secure their equipment, systems and network.



Picture 3. Critical places to secure in Telecommunication (Miquel Sitjar, 2015)

Abloy is specialist in demanding and challenging environment. The products are customized for customers' needs and handle even extreme environment. Abloy has sales units and distributors providing local services and expertise worldwide. It is already present in telecommunication markets in several countries.

Abloy has solutions for any situation for telecom market, every aspect has been taken under the consideration. A cylinder mechanism is unique and patented rotating disc mechanism, which makes cylinder pick-proof and bump proof. The master key features can be utilized both mechanical and electronic access. Products have been tested to several international standards and customer-specific standards for high security. A high number of stolen or lost keys can be a one concerning issue in key control, Abloy Oy has timesaving and cost-effective solutions for a problem. Individually coded electromechanical key system, which makes key management and key security much easier to track and keep control of critical keys and accesses. (Abloy Oy, 2015)

4.5.3 Main Telecommunication Operators

In the year 2010, in Thailand there were 6.75 million mobile subscribers in total. The main mobile phone operator companies are Advance Info Service (AIS), Total Access Communication Public Company Limited (DTAC) and Telephone Organization of Thailand (TOT).

Information and the tables of market share of telecommunication operators in Thailand are mentioned in table 1. "Market share", information is from the year of 2014. Share of the market has been divided between the key players of Thai telecom market, AIS, DTAC and TOT. The biggest market share holder is AIS with 46.50 percentage of share. DTAC holds 28.50 percentage of market and TOT has twenty four percentages. The rest of the market share, less than one percentage, shared between two companies, Communication Authority of Thailand (CAT) and True Corporation.

Company	Share of the market %
AIS	46.52
DTAC	28.50
TOT	24.26
Others	< 1

Table 1. Market share of Thai telecommunication

4.5.4 Key Players

Advance Info Service (AIS)

Advance Info Service (AIS) is the biggest and the first mobile network operator in Thailand. The company was established in April in 1986, when AIS started with a computer rental business. The company is subsidiary company of the Shin Corporation and it is originated from the computer dealer, which receive a monopolistic concession to market.

Advanced Info Service (AIS) is Thailand's largest GSM mobile phone operator with more than thirty million consumers. The highly profitable company is controlled by the Intouch Holdings Public Company Limited, formerly called Shin Corporation, which is owned by the Singapore government.

To lead and shape the multi-media communications market in Thailand through innovation, customer experience, technology, people and culture are aspects, which influence change. The company commits to deliver superior and innovative services that can add value and enhance peoples' daily lives and to provide their customers with the best customer experience at competitive prices. They commit to drive entrepreneurship and a professional work culture for all our employees and to enhance value for their stakeholders through Sustainable Development and creating value to society through Creating Shared Value.

The service utilize the 900MHz frequency by using GSM (Global System for Mobile Communication) and incorporate Digital Phone Ltd. to offers services in 1800MHz frequency using Digital GSM 1800 Technology. Cooperating with the company's affiliate companies also allows

them to offer diverse services, wireless payment, cash card, call center and international roaming services. (AIS, 2015)

Total Access Communication Public Company Limited (DTAC)

Total Access Communication Public Company Limited (DTAC) is operating under the brand DTAC. The brand was founded in August 1989 to provide wireless telecommunication service in Thailand. The company is operating under the Communications Authority of Thailand (CAT). (DTAC, 2015)

CAT Telecom Public Company Limited was registered in August 2003. CAT Telecom was corporatized from the Communications Authority of Thailand. All the business rights, obligations, assets and liabilities related to telecommunication of the Communications Authority of Thailand were transferred to the newly established CAT to ensure the seamless Continuity of Operations and Services provision.

CAT Telecom operates and delivers telecommunications and other related services to customers domestically, internationally and overseas. Even though, with hundred percentage stake of company's share capital is held by Ministry of Finance, CAT Telecom still has the maintains status of a state-owned enterprise. (CAT Telecom, 2015)

Telephone Organization of Thailand (TOT)

Telephone Organization of Thailand (TOT) was established in 1954 to take control of the telephone system in Thailand. TOT is the largest fixed-line network operator in Thailand. It is the first fixed-line telephone system, which was installed in Thailand under the Ministry of Defense in 1881. Later on its' operation was transferred to the Post and Telegraph Department.

TOT has mission to become a leading telecommunication service provider in Thailand and to provide the quality telecommunication services with ensure public access to information and communication services. (TOT, 2015)

One of the TOT's sub-brands is True Corporation, which was established in November 1990 to incorporate as a fixed-line service provider. The company is operating under a build transfer operate

concession with TOT. True Corporation was registered to a public limited company in 1993 with the name Telecom Asia Corporation Public Company Limited, but later on it was rebranded in with the name True. (True Corporation, 2015)

4.6 Competition of locking systems in telecommunication industry

Abloy Oy is not alone in Thai telecommunication industry with the locking and securing telecom companies' services. There are local Thai locking companies, but foreign competitors as well. Local locking companies are focused on mainly in padlocks and locks for office furniture. Foreign locking companies otherwise are providing different types of electronic locking solutions for many industries. There are found three bigger foreign locking companies as competitors for Abloy Oy, companies are Häfele, Control A Solutions Co. Ltd. These two companies are providing similar solutions for the Thai telecommunication market and following is a small presentation of the both companies and their products.

Häfele, AbusControl Access

Häfele has an overall product range consisting of more than 50,000 products. The company is a partner to the wood processing trade, the furniture industry, specialist dealers as well as planners and architects. This variety of products is supplemented by a unique service for customers. With products such as Dialock, Compact, Vitaflex and Top Comfort, Häfele provides solutions that are geared to special customer requirements.

Dialocks, the electronic locking system is the intelligent identification and locking system based on transponder technology. The transponder technology makes untouched opening and closing possible and provides optimum security, even if keys are lost. (Häfele, 2015)

Control A Solutions Co., Ltd.

Control A Solutions is a leading company in information of technology systems for over eight years. The company develops solutions that can be applied to individuals' needs. Their system is designed to support and enhance the user. An integrated solution includes both software and

hardware. The company has an experienced team, technical and customer service, which are ready to help clients by bringing the technology to its full potential.

Access control solution refers to the practice of controlling or restricting entrance to a property, a building, rooms or resources. Master safety key achieves this by integrating physical barriers with electronic solutions like card readers, fingerprint scanners, key cards and push buttons. Significant benefits for the Thailand market is that electronic access control systems provide ID and personal profile control, time and attendance, data archiving, safety control, zoning and filtering. (Control A, 2015)

5 RESULTS

The aim was to receive answers to the survey form the three big telecom provider companies, Advance Info Service (AIS), Total Access Communication Public Company Limited (DTAC) and Telephone Organization of Thailand (TOT). The security survey was sent only for these three companies and the answers were received successfully from every company.

All the companies are using both mechanical and electronic locking systems in their current security solutions. The system providers are local and foreign manufacturer. The companies are very satisfied of current locking systems. Even though companies are satisfied in their current systems, there are concerns regarding on security. The biggest concerns are low security level, key control, quality and functionality.

All the companies have upgrading plans for their locking solutions in near future, in next two years or as soon as they find the best solution for them. In their upgrading plans, the trend is that, both mechanical and electronic locks should be used.

The companies' decisions of new locking solution are based on aspects such as high security level and quality. The study noted that a high price is not raised as an issue, the attitude behind that is that high price means good quality. Also it would be ideal situation to have provider, which is easily available also after service, meaning for instance availability of technical support and problem solving services.

All the companies have plans to upgrade their locking systems and two of three wanted to be contacted by Abloy Oy regarding on product information and future plans. TOT would like to receive more information of ABLOY products and be contacted regarding on locking solutions by Abloy. A pleasant surprise was known that AIS is aware of ABLOY products and they are using already Abloy locks in their current security solution, but they would like to receive more information of possibilities regarding on future planning. Only DTAC answered that they are not willing to be contacted or receive more information about Abloy and its' products.

The results are positive information. Information, which found out trough out the research, was that TOT is using ASSA ABLOY global consumer brand products, Yale Digital Locks, and they are not

aware of that. That is telling of low recognize of Abloy brand in telecommunication industry in Thailand. Brand image is important factor in such a small market area where Abloy Oy is competing.

The results are positive information. It seems like Thai telecommunication industry would be high potential market for Abloy Oy. There is already usage of ABLOY products, and because there seems to be demand and interest based on research, expanding seems logical.

The security survey and the answers of telecom companies are found from Appendices (see Appendices 1 and 3).

6 CONCLUSIONS

Based on market research, major founding to take under the consideration is culture and language aspects, if Abloy Oy is planning to expand into Thai telecom market. Current situation in Thailand is unstable from social and political point of view. On the other hand, economic situation is getting more stability position in individual level, but in business sector as well, both parties have more money to spend and make the bigger investments. Unstable social situation opens more potentiality for locking and security companies over all. People are feeling insecure, solution for that is high quality and functional security solutions. In telecommunication industry government's order is to secure data flow and privacy.

In Thai telecommunication industry, there are three main provider companies, those are key players in the market and covers over ninety-five percentage of market share. Based on quantitative research, Thai telecommunication industry is potential market area for Abloy Oy. Even though companies are satisfied on their current locking systems, companies are upgrading their security systems in the near future, mainly in two years. They are willing to be contacted by Abloy regarding on product information and future plans.

The biggest concerns are bad quality, key control and low security in current systems, Abloy has solutions for all those issues. Telecom companies demand from the new security and locking system a better quality, which is a major factor of choosing a new system. Other factors, which are affecting to decision making are high security level and quality of products, but also company should be easily to available after service, meaning services such as technical support. High price level is not an issue for the companies, it messages good quality products. Brand recognize of Abloy is very low among telecom companies, only one of the companies knew what is Abloy and about its' products. One of the answered companies are using ASSA ABLOY global consumer brand Yale locks, but they are not aware of Abloy or its' products.

One of the major telecom companies is already using Abloy locks in their current system and another is using Yale locking system, which is global consumer brand within the ASSA ABLOY Group. Both local and foreign locking companies are used in security systems. Number of competitive locking companies in same industry does not seem like big competition for Abloy Oy,

there are only two competitive companies in Thai telecom industry, Häfele and Control A Solutions Co., Ltd.

For the final conclusion, Abloy covers already quite a big area on locking of telecommunication industry in Thailand. Even the Abloy Oy has operation in the country, Abloy's brand recognize level is low in Thailand. Brand knowledge and brand recognize should be increased among target consumers, especially telecommunication industry. Abloy has good foundation already in telecom market to expand in Thailand. Culture is a big factor creating strong long-term relationships with customers, one must be aware of mentality of Thais and create trust between customer and the company. It is time consuming to create successfully those long-term relationships.

More research needs to be done. In appendices, there are organizational structures of the three biggest telecommunication operation companies, DTAC, AIS and TOT (Appendix 4, 5, and 6). There must be found the key persons to whom to contact and start to build relationship with. In Thai culture, there is very strict hierarchy inside the organization, exploring each of the companies hierarchy helps to find correct person and understand their behavior.

One major aspect is corruption. Thailand is ranked 90th corrupted country in the world in year 2014. Abloy Oy needs to be aware of the corruption in Thailand and its functionality. As a foreign company it must take under the consideration is the company ready play rules of the target country, accept the corruption and be part of it. Because of the values of the company, is there any chance play with own rules in the market or find other solution.

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Security Survey

1. **The position in the company:** _____

2. **Are you currently using a mechanical or an electronic locking solution?**
 - Mechanical
 - Electronic
 - Both

3. **From where are the current locks?**
 - Local manufacturer
 - Foreign manufacturer
 - I don't know.

4. **From 1 (not satisfied) to 5 (very satisfied) are you satisfied with the quality of current locks?**
 - 1 2 3 4 5

5. **What are your biggest concerns with the current locking solution? You may choose more than 1 option.**
 - Key control
 - Low security
 - Functionality
 - High price
 - Quality
 - Other, what? _____

6. **Are you planning on upgrading your security solution in the future?**
 - Yes
 - No (If you answered no, please go straight to the question number 10.)

7. **Do you think you will end up in mechanical or electronic locking solution?**
 - Mechanical
 - Electronic
 - Both
 - I don't know.

8. **What aspects affects to decision making of choosing new locking solution? You may choose more than 1 option.**
 - High quality products
 - Other, what?: _____
 - Low price level
 - High price level, it means a good quality. _____
 - Relationship with locking company
 - Brand recognize/Brand image
 - Security
 - Local company
 - Foreign company
 - After service requirements

9. When you have been planning to upgrade your locking solution?

- During this year.
- In 2 years
- In 5 years or later.
- As soon as we find suitable solution.

10. Are you familiar with Abloy products?

- Yes
- No

11. Did you know that Abloy is operating already in Thailand?

- Yes
- No

12. Do you wish to receive more information on Abloy products?

- Yes, please. Here is contact information: _____
- No, thank you.

13. Would you like to be contacted by Abloy in the future regarding on security solution?

- Yes, here is contact information: _____
- No, thank you.

Contact Information

COMPANY	PHONE NUMBER/ FAX.	E-MAIL
<p> AIS </p> <p>(Advanced Info Service PLC 414, Intouch Tower, Phaholyothin Rd., Phayathai, Bangkok 10400, Thailand)</p>	<p>+662 299 5117</p>	<p>investor@ais.co.th</p>
<p> DTAC </p> <p>(Total Access Communication PLC. (dtac) Head Office 319 Chamchuri Square Bldg.22nd-41st Fl., Phayathai Rd., Pathumwan, Bangkok. Thailand. 10330)</p>	<p>0 2104 3000 / fax. 0 2104 3088</p>	<p>Contact form: http://www.dtac.co.th/en/business/contact/form.html</p>
<p> TOT Public Company Limited </p> <p>(Headquarter: 89/2 Moo 3, Chaeng Watthana Road, Thungsong-Hong, Laksi, Bangkok 10210, Thailand)</p>	<p>+662 240 0701 +662 643 1111 / fax. +662 643 1651</p>	<p>1100@tot.co.th webmaster@tot.co.th</p>

Results

Company	Current locking solution mechanical/electronic?	Local or Foreign?	Satisfaction rate? (1-5)	The biggest concerns?	Plans for upgrading?	Mechanical or electronic in the future?	Decision making is based on?	When to upgrade?	Familiar with Abloy, would like to have more info and be contacted regarding on locking solution?
AIS	Both: Access Control, Abus, Abloy and local locks	Both	3	Low security, key control, quality	Yes	Both	High price level(it means good quality), security and easily available	In 2 years	Yes, would like to receive more info.
TOT	Both: Local locks, Yale Digital Locks	Both	4	Quality	Yes	Both	Security	In 2 years	No, but would like to receive more info of products and be contacted regarding on locking solutions. teerapz@hotmail.com
DTAC	Both	Don't know	4	Functionality	Yes	Don't know	High quality and security	As soon as they find the best solution for them.	No

Organization Structure, AIS

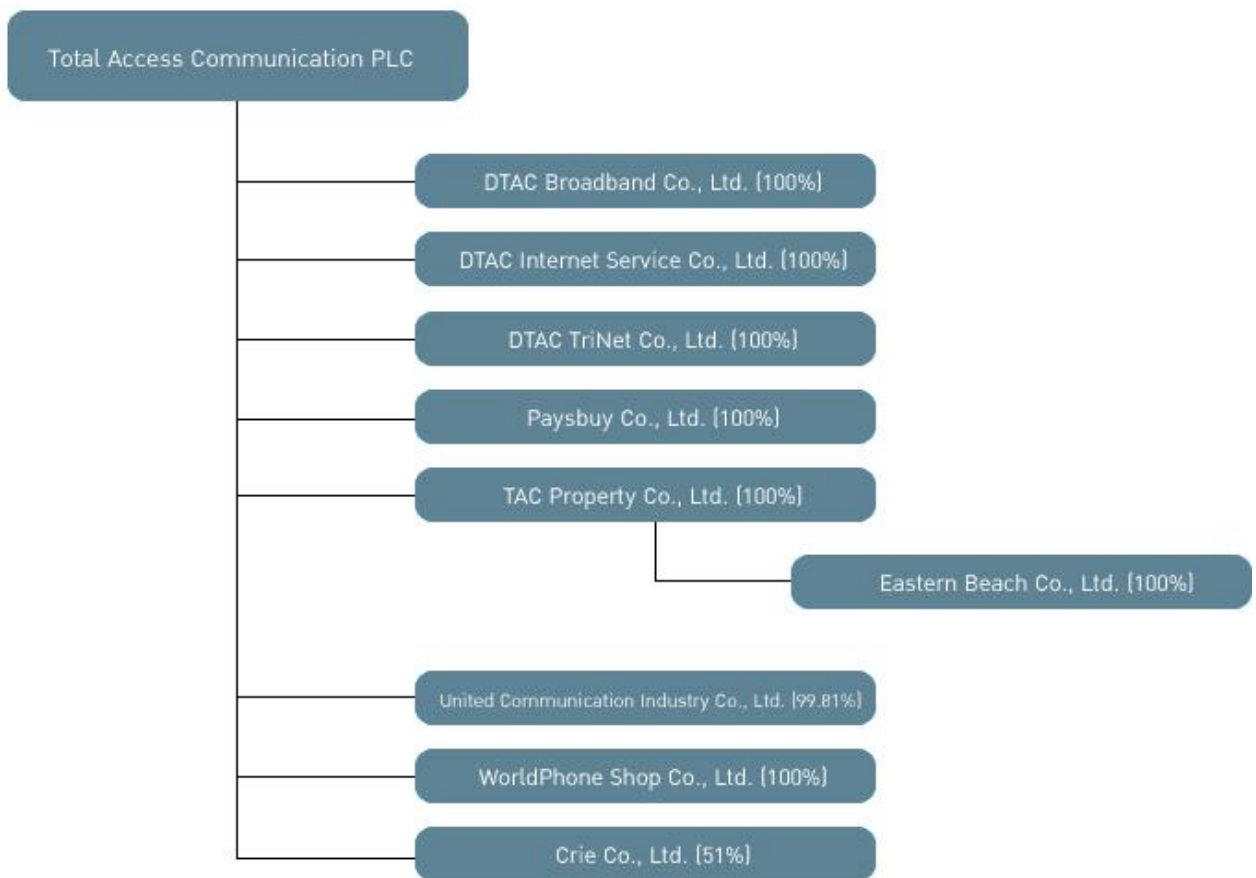


Mr. Allen Lew Yoong Keong
Chairman of the Executive Committee



Mr. Somchai Lertsutiwong
Chief Executive Officer



Organization Structure, DTAC

Organization Structure, TOT

