

Transnational Education in Thailand

EXPLORING OPPORTUNITIES FOR THE UK

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This report is an update based on an original commissioned report by the British Council in April 2019.

The research presented in this report was gathered through a combination of desk research, policy review and interviews. Every effort has been made to ensure the reliability and timeliness of the information included, however, many of the issues covered are fluid and may be subject to change.

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1. Executive Summary

- Transnational education (TNE) in Thailand is still relatively undeveloped and the number of Thai students enrolled in TNE programmes still low, compared to the number of Thais studying at overseas universities each year.
- The main modes of TNE delivery in the country are joint and dual degree programmes between Thai and overseas universities.
- In addition, in 2017, Thailand's then Minister of Education announced plans to encourage "Internationally renowned" overseas universities to establish branch campuses in Thailand. These campuses can be set up either independently or in cooperation with a local Thai Higher Education Institution (HEI) .
- Under the new policy, branch campuses can receive expedited approval under the process set out by Article 44 of the Thai constitution, which allows the government to issue laws for a number of reasons, including "for the sake of reform in any field" without going through the normal legislative process. Approvals are judged by a committee headed by the MHESI.¹
- Incentives for branch campuses are decided on a case-by-case basis but will be no worse than those for non-profit private HEIs, including exemption from taxes such as corporate income tax. Additional incentives for institutions that set up in the "Eastern Economic Corridor" - three provinces in the east of the country which have been targeted for support to attract foreign investment - include exemptions from restrictions on foreign land ownership, relaxed visa measures for overseas staff and lower rates of personal income tax for employees.
- One important restriction on branch campuses under the new policy is that they may only offer subjects related to the industries prioritised by the "Thailand 4.0" policy, which aims to develop high-value and high-technology sectors. The overseas university should also be a "renowned foreign higher education institution", a status which is not explicitly defined but which mainly depends on the university's position in international rankings such as those published by QS or Times Higher Education.
- So far, three new branch campuses have received approval under the new regulation - a cooperation between Carnegie Mellon University and King Mongkut's Institute of Technology Ladkrabang, a collaboration between National Taiwan University and Amata University, and a collaboration between Les Roches and the ASIAN Institute of Hospitality Management owned by the Minors.

¹

Following the restructuring of the Ministry of Education, this regulation is now under the purview of the Ministry of Higher Education, Science, Research, and Innovation (MHESI).

- It is also possible for a foreign institution to establish a subsidiary as a private HEI on the same terms as a private Thai institution. This model was previously followed by Webster University Thailand, which officially registered as a private Thai university but described itself as “an extended international campus of Webster University”. The university, however, has ceased operations in Thailand.
- As Thailand is a relatively small TNE market, and the majority of Thai students have a strong preference for first-hand international exposure overseas, UK universities see the setting up of an international branch campus in Thailand as a less preferable choice of transnational education; other forms of TNE would fit Thailand better.
- Aside from branch campuses, joint and dual degree partnerships, either in person or through distance learning form the main modes of TNE delivery. Joint and dual degree partnerships require multiple stages of formal approval from the degree committee at faculty level to the university council and ultimately the ministerial authorities - the process is relatively straightforward and is based on curriculum mapping as agreed by the partner institutions.
- According to the most recently updated list of programmes by MHESI, there were a total of 9 active joint degree programmes², 84 dual degree programmes, and 33 national degree programmes at Thai HEIs. Fourteen of these partnerships involve UK universities.
- At the undergraduate level, joint and dual degree programmes usually involve students studying in Thailand for two years and then moving to the partner university overseas for a further two years. The extent of the overseas institution’s involvement in the part of the course taught in Thailand varies from programme to programme.
- Many Thai universities also offer “international programmes”, referring to English-medium degree courses run by the Thai university itself. These are rising in popularity, both among Thais and international students. Joint and dual degree TNE partnerships are mainly established with the Thai university’s international division.
- University interviewees were positive about the prospects of setting up new joint or dual degree partnerships with overseas institutions. Most saw these partnerships as competing with overseas study rather than taking away students from Thai universities, and may help to enhance Thai universities’ reputation and international connections. It is likely that higher tuition fees charged for TNE programmes are also an advantage for some institutions.
- Priorities when choosing a partner include course compatibility and support offered to Thai students when overseas (including both practical and financial support such as tuition fee discounts) as well as the overseas partner’s overall academic and research strength.
- From the student perspective, there is low but increasing awareness of dual and joint degree programmes. Students largely see these as a lower-cost and more flexible alternative to a full overseas degree programme and find it attractive for the same reasons as overseas study in general - including access to higher-quality education, the prestige of an overseas degree leading to better employability, and opportunities to develop international experience.
- University interviewees appeared to have less interest in working together on branch campuses. Agents also felt that branch campuses may be a tough sell to students given the lack of awareness about this education model in Thailand, and stressed that a branch campus must convince students and their parents that it could offer the same quality education as the partner campus overseas.
- The attractiveness of setting up a branch campus in Thailand would depend on the university’s goals, with the simpler approval process and tax incentives weighed against subject restrictions and low student awareness. The potential payoff for a branch campus, will largely depend on Thailand’s long-term development as a destination for international students, which is still an uncertain proposition. For institutions with more near- and medium-term objectives, joint and dual degree partnerships may present more appealing opportunities.
- In 2020, the Ministry of Higher Education, Science, Research, and Innovation (MHESI) launched the “Reinventing University Initiative” as part of Thailand’s 4.0 policy to elevate the quality of Thai universities. Whilst transnational education is not explicitly mentioned in the government initiative, its role in advancing the goals of higher education in Thailand is well-accepted.

²

Latest available data is for the 2017/2018 academic year.

2. Introduction and research methodology

Thailand is one of East Asia's leading countries in terms of student mobility, with statistics from the Higher Education Statistics Agency (HESA) showing that 5,840 Thai students studied in the UK in the 2021- 22 academic year. However, the country has historically been less prominent in terms of transnational education (TNE), with 1,055 students following UK higher education courses within Thailand in the same year. More than half of these students were studying for distance learning qualifications, leaving only around 390 on in-person programmes.

To better understand the opportunities for transnational education in Thailand - including both the prospects for new UK branch campuses and the environment for joint and dual degree programmes in partnership with Thai universities - the British Council in 2018 conducted research consisting of a combination of desk-based research,

telephone interviews and in-person and online interviews with key stakeholders:

- Desk research covering the current status of Thailand's international higher education market, focusing particularly on transnational education - including joint/double degree programmes, franchising or validation of degrees and credit transfer agreements, as well as branch campuses.
- Interviews with education agents within Thailand, to understand student perceptions of transnational education.
- Interviews with Thai universities currently engaged in transnational education or with the potential to do so.
- Interviews with relevant government officials, to understand relevant policies and potential future changes.

Key research topics include current policies related to TNE, such as permitted types of partnerships and relevant regulations or approval procedures; government support for TNE partnerships; the scale and format of current TNE activity (both with the UK and with other partner countries); student attitudes towards TNE in Thailand and potential student demand for new partnerships; as well as university attitudes towards future TNE cooperation.



Due to changes in Thailand's government structure and developments in the macro-environment post-pandemic, including changing preferences and demand from both Thai and UK universities and

students for TNE, this report provides an update from the original report with the aim of understanding the current stage of TNE in Thailand and to identify new opportunities and challenges.

3. Macro environment

3.1 Economic and demographic background

Thailand is an upper-middle income country with a per-capita GDP of around US\$6,900 in 2022 - this is lower than that of Singapore, Malaysia, and Brunei Darussalam, but higher than all other fellow ASEAN members including Vietnam and Indonesia.

Thailand's economy has seen real (inflation-adjusted) GDP growth of 20 per cent between 2012 and 2022, equivalent to around 1.8 per cent per year, which is below that of the wider ASEAN region over the same period³.

Thailand's economy remains largely stable, supported by abundant natural resources, well-developed infrastructure, and modern logistics systems. Thailand's 20-year National Strategy (2018-2038) was launched in 2018 with the vision of making Thailand "stable, wealthy, and sustainable" and for Thailand to become a developed country. This is aligned to the country's economic development strategy, "Thailand 4.0", which focuses on developing high-value and high-technology sectors to transform Thailand into an innovation-driven, high-income nation by the year 2036.

Figure 3.1: 10 Priority industries in "Thailand 4.0"

Short and medium-term priority industries	Long-term priority industries
Next-generation automotive	Robotics
Smart electronics	Aviation & logistics
Affluent, medical & wellness tourism	Biofuels & biochemicals
Agriculture & biotechnology	Digital Technology
Food for the future	Medical hubs

Source: Ministry of Industry

³
<https://data.worldbank.org/indicator/NY.GDP.MKTP.KD?end=2022&locations=TH&start=2012>

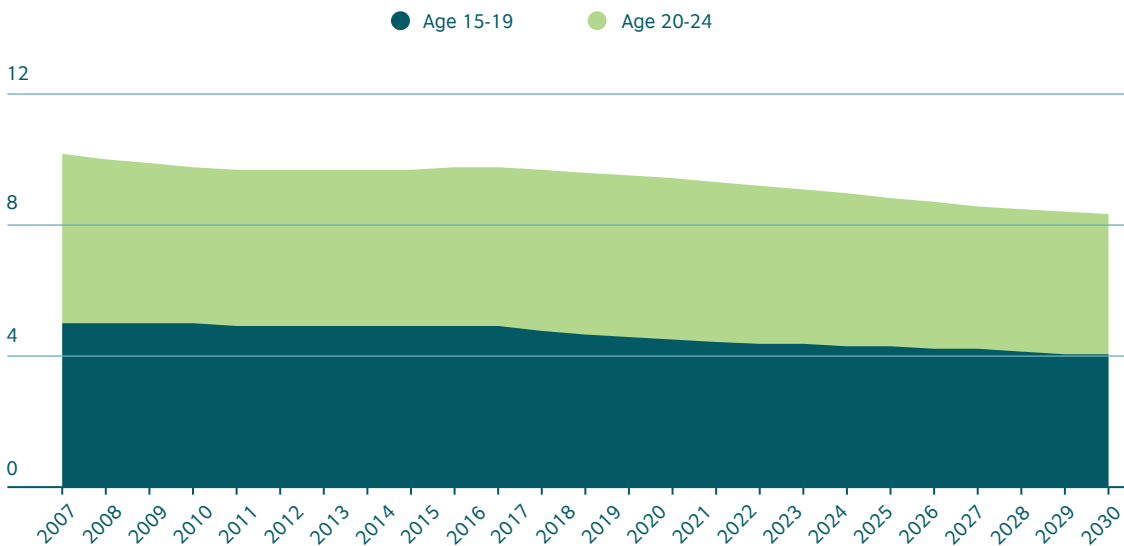
The government provides incentives for companies to invest in the development of these priority industries. Aside from limited-time reductions in corporate income tax and deductions for utility and infrastructure costs, the government has established a 10 billion Baht (£230 million) fund for investment in research and innovation as well as the development of expertise in the 10 industries, known as the Fund for Enhancement of Competitiveness for Targeted Industries.

Another important policy is the Eastern Economic Corridor (EEC), a scheme to support development in three provinces in the east of the country near Bangkok: Chachoengsao, Chonburi and Rayong. The development of this corridor is closely linked with the 10 targeted industries, and investment incentives include similar tax exemptions and deductions⁴, support with visa applications and more liberal land ownership policies.

In line with the National Strategy, MHESI aims to push for higher education as a mechanism of development, particularly in the areas of advancing human competitiveness and innovation. Towards that end, MHESI has outlined three main missions for the higher education sector, which include: 1) improving accountability and the quality of education, 2) encouraging research and innovation towards a more value-added economy, and 3) building knowledge and expertise that meet the demands of society and the economy.

Demographically, the population in Thailand of approximately 71.6 million in 2023 is fast aging, with the United Nations' Department of Economic and Social Affairs, Population Division anticipating that the proportion of Thai people ageing over 65 years will increase to 20 per cent of the total population in 2030. Thailand's student-age population is also facing a significant decline - in the last 30 years or so, the number of 15-24 year olds in the country has already fallen by 25% to less than 9 million from almost 12 million in 1990. Due to the low birth rate, the United Nations, Population Division (2022) also forecasts a constant drop in the number of 15-24 year olds to approximately 7 million people by 2040.

Figure 3.2: Thailand's student-age population over time



Source : UN Population Division

⁴

These include exemption from import tax for relevant equipment and time-limited exemptions from corporate income tax.

3.2 Higher Education in Thailand

Thailand is currently home to 57 public universities, 27 autonomous universities (publicly-funded universities with greater freedom of operation) and almost 71 private universities, colleges and institutes

The 57 public universities include 38 Rajabhat Universities, former teacher training colleges that were upgraded to full university status in 2005. Despite their larger numbers, private institutions tend to be much smaller than public universities and accounted for less than 16 per cent of the Higher Education (HE) student population in 2023.

Higher education in Thailand is provided by both public and private institutions, and includes universities, institutes of technology, and vocational colleges which offer both degree and non-degree curricula. For degree courses, Thai higher education institutions (HEIs) offer education from bachelors to master's and doctoral level qualifications. Simultaneously, many HEIs conduct non-degree programmes, such as training courses, which are conducted both online and in-person, and award certificates for skills development at the end of the programme.

Whereas universities are the main providers of higher education, there are several schools, colleges, and institutes of technology that also provide higher education. Several of those institutions have also achieved university status despite retaining their original names and titles.

Public HEIs are generally the country's most prestigious, with eight public Thai universities ranked in the top 1,000 of the QS World University Ranking. Thailand's leading university according to this ranking is Chulalongkorn University, ranked 224th, followed by Mahidol University in 256th place. Both universities are in Bangkok, where five of the country's eight world-ranked institutions are located with the three remaining institutions located in three other provinces.

The main government agency responsible for the quality assurance and performance of Thai universities is the newly formed MHESI, which is a new ministry comprising the former Office of Higher Education Commission (OHEC), the former Ministry of Education, the former Ministry of Science and Technology, the National Research Council of Thailand and the Thailand Research Fund. As a new unified body of former education and science/ research-related agencies, MHESI is tasked with setting the policy direction for Thai universities, with the focus shifting from standalone education policies in the past to education policies that are tied to research and innovation objectives.

As part of the policy and strategy of Thailand's Higher Education, Science, Research, and Innovation 2020-2027, MHESI has implemented the 'Reinventing University' initiative with Thai universities now being categorized into five strategic groups (see appendix 4):

- (a) Global and Frontier Research (17 universities), focusing on world-class research and international competitiveness;
- (b) Technology and Innovation (19 universities), addressing Thailand's technological needs;
- (c) Area-Based & Community Development (48 universities), emphasizing local development and better well-being of communities;
- (d) Moral & Intellectual Cultivation (2 universities), integrating religious learning into the formal education; and
- (e) Specialised & Professional Group (18 universities), catering to developing specific skills aligned with Thailand's 4.0 development plan. Transnational education is mostly related to the first group of universities which focus on global and frontier research.

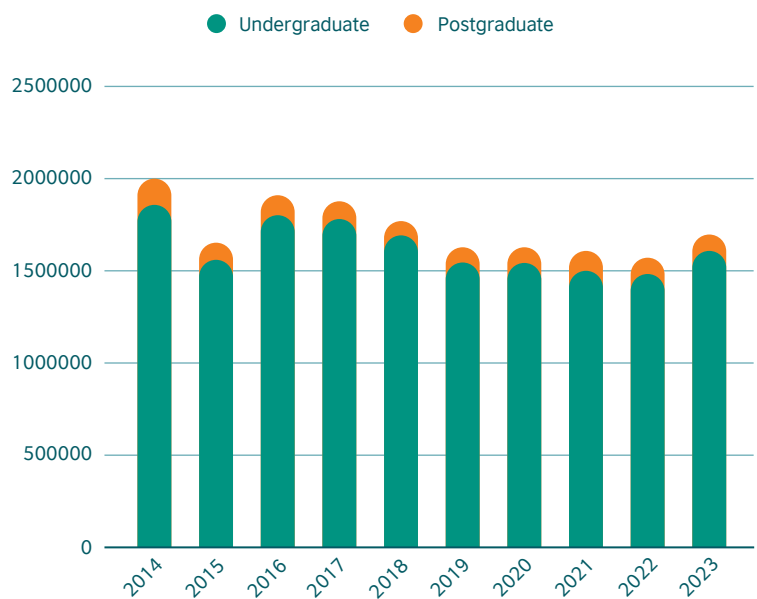
Education in Thailand is mainly conducted in Thai; however, the trend of using English as the medium of instruction is growing rapidly, as seen by an increasing number of English or international programmes at both public and private universities.

According to MHESI (2023), there are approximately 1.6 million students enrolled in higher education institutions in Thailand. Undergraduates account for 90%, while those pursuing their Masters and PhD level studies account for only 7%. The remaining 3% are studying at professional diploma level.

1.6 million
students enrolled in
higher education
institutions in Thailand

90%
Undergraduates

Thailand's HE student population between 2014-2023



Source : MHESI

3.3 Student Mobility from Thailand

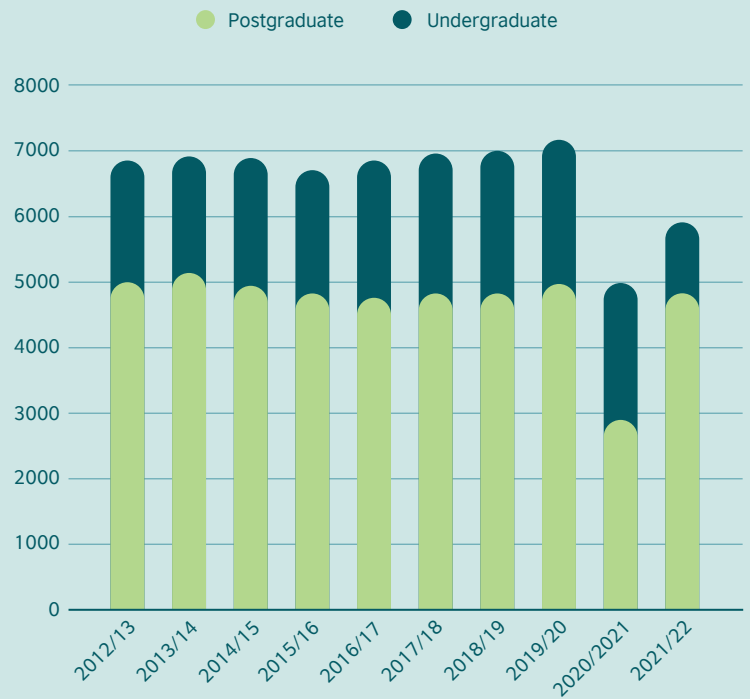
According to latest available UNESCO estimates, there were around 21,000 Thai students studying overseas in 2021. Despite the fall in domestic enrolments, the number of outbound students has risen slightly over the past five years. The UK and US attract the largest numbers of HE students followed by other major destinations, including Australia, Japan and China.

In the UK, there were 5,840 Thai students enrolled in HEI programmes in 2021-2022, a large majority of whom were postgraduates. Thai student enrolments in the UK had fallen significantly by more than 30% in 2020-2021 from the previous academic year, due largely to the pandemic, and although the number of enrolments in the UK rebounded in 2021-2022, it was still 20% below its pre-Covid peak seen in 2019.

From a subject perspective, Business and Administration is more popular than any other subject for Thais in the UK, accounting for over 30 per cent of all students - more than three times as many as Engineering and Technology, the next most popular field. Other popular fields include Social Sciences, Law, and Computing.

Thailand is also a regional study destination, attracting around 27,000 international students, according to latest estimates from UNESCO (2021). Most of these students came from other ASEAN or nearby Asian countries; the largest source country was China, followed by Myanmar, Cambodia, Vietnam and Laos. Thai authorities hope that promoting Thailand as a regional education hub will help offset falling domestic student numbers due to the decline in the youth population.

Figure 3.4: Thai HE enrolments in the UK



Source : HESA Student record 2012/13-2021/22

Business and Administration is more popular than any other subject for Thais in the UK, attracting more than three times as many students as Engineering and Technology

4. Transnational education in Thailand

4.1 Mode of TNE delivery

Transnational education in Thailand can be divided into five main types of programmes or partnerships, in addition to “international programmes” at Thai universities, which refers to English-medium programmes taught by the domestic institution. A summary of each of these different modes of delivery, along with government approval requirements, is given below.

4.1.1 Collaborative joint / double degree programmes

Joint and double degree programmes are the best-known type of transnational education in Thailand. These programmes are developed by a Thai university in collaboration with one or more overseas partner universities. After approval by the university’s Council, all curricula must be submitted to MHESI’s Office of the Permanent Secretary for approval.

Thai universities have the power to award their own degrees without needing external approval, and this also applies to joint or dual degrees. However, MHESI reserves the right to “approve” the joint or dual degrees awarded by Thai HEIs. Details on the approval process is shown in Figure 4.1⁵.

Students on joint degree programmes earn a single degree co-awarded by both the Thai and overseas HEI, while double or triple degree programmes award separate degrees from each partner.

According to the most recently updated list of programmes⁶, there were a total of 9 active joint degree programmes, 84 dual degree programmes, and 33 national degree programmes at Thai HEIs.

Some courses in the country are accredited by relevant professional bodies such as the Council of Engineering. Similarly to the UK, this accreditation is not legally required to offer a degree, but it is essential for students in terms of professional recognition. According to one Thai university interviewee, meeting the requirements of the Council of Engineering accreditation was significantly more challenging than gaining approval from MHESI for the same course.

The delivery mode of dual degree programmes vary. At some universities they make up a separate degree programme, either with teaching delivered by the foreign partner in Thailand or with a required overseas component to the course. However, in other cases they are essentially double-degree articulation agreements, with students studying on the same course as the university’s own English-medium international programme (see Section 4.1.6) and deciding whether or not to go abroad after the first two years. In either case, there are usually requirements that students must meet before they are able to go to the UK, including meeting minimum performance standards on the academic course as well as minimum scores on IELTS language examinations.

While most dual degree programmes involve the student articulating to the home campus of the foreign institution, at least one programme exists between a Thai university and a branch campus of a UK university. Prince of Songkla University, a public university in southern Thailand close to the border with Malaysia, cooperates with the University of Nottingham’s Malaysia campus to deliver a 2+2 bachelor’s programme in Business administration.

⁵

Beyond this approval, the Thai government has little involvement in universities’ joint or double degree programmes. Tuition fees are set by the university council and are not regulated by MHESI. Joint or double degree programmes can be offered at any level, based on any model (e.g. 2+2, 3+1 etc).

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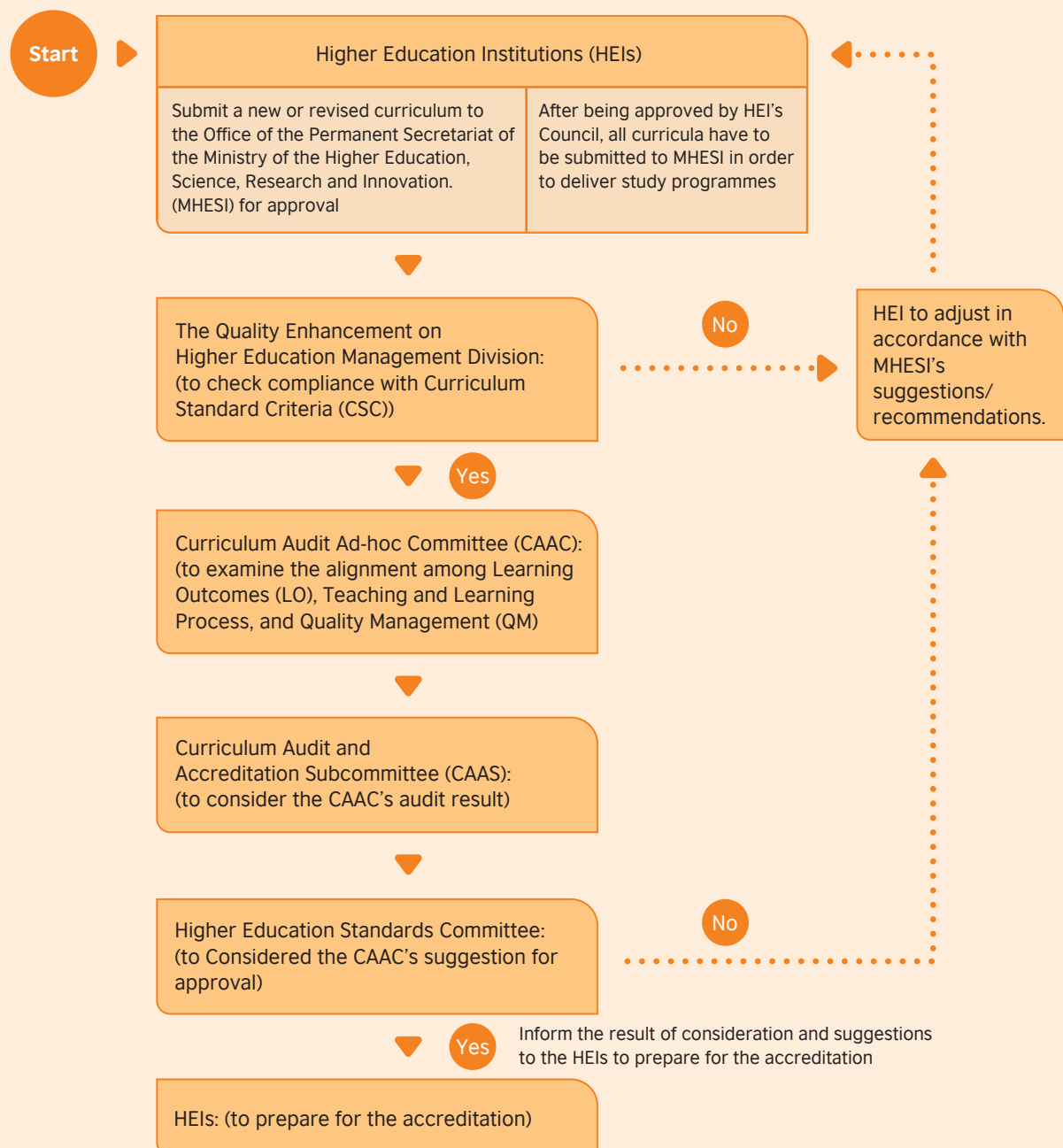
Latest available data is for the 2017/2018 academic year.

The financial model for a dual degree partnership varies from institution to institution. In some cases, the two universities' finances and teaching are completely separate - students study for two years in Thailand with fees paid to the Thai partner, followed by two years overseas with fees paid to the overseas partner. In many cases, overseas universities offer a discount to students transferring from a Thai programme, either as a flat rate for all

articulating students or based on grades or examination performance.

At other universities, there is input from the overseas partner in the form of fly-in faculty, staff training and recruitment support. Again, the form of payment varies - in some cases the Thai university pays a set annual and/or per-student licensing fee, while other partnerships may provide payment in kind.

**Figure 4.1: Process of Approval for a TNE Programme in Thailand:
Phase 1 Curriculum Approval before Accreditation**



4.1.2 Franchising and validation

A partially franchised programme is currently operated by NCUK in partnership with Rangsit University⁷. The programme offers International Foundation Year and International Year One programme in cooperation with the Northern Consortium (NCUK) group of UK universities. Graduates who have completed the International Year One programme can progress to the second year of an undergraduate course at NCUK partner universities in the UK. MHESI approval is not applicable in this case as the degree the students eventually receive is earned in the UK.

4.1.3 Articulation and credit transfer

While a joint / double degree is the most popular and well-known TNE model, articulation has recently been gaining recognition and is being offered more widely in Thailand. The bulk of these arrangements are with private Thai universities. Details vary based on the agreement between the Thai and UK universities in question, but articulation agreements are mostly available to students seeking to pursue a Master's degree with one of the models being 3 months in Thailand + 9 months in the UK.

The main government regulation surrounding articulation programmes and credit transfer agreements is related to the duration of study at the overseas HEI. Degrees from foreign institutions are only recognised by Thai authorities if the student has studied in that university for at least one year / at least half of the full duration of the programme.

4.1.4 Distance learning

In terms of student numbers, distance learning is the most popular mode of UK transnational education in Thailand compared to face-to-face learning. In 2021/22, HESA recorded 665 students in Thailand who were enrolled on UK distance learning programmes, out of a total 1,055 Thai students enrolled in UK TNE programmes overall. The number of distance learning students in Thailand has grown by 22 per cent over the last five years, compared to a global growth rate of 15 per cent for all UK TNE distance learning students worldwide in the same period.

Although there are no legal restrictions to UK universities offering distance learning in Thailand, qualifications from these programmes are not accepted by the Office of the Civil Service Commission. This means that a UK degree obtained through distance-learning cannot be used to apply for a job in the government or public sector. However, distance learning degree programmes are still popular among students who plan to work in the private sector, as well as among expatriates.

4.1.5 Branch campuses

Branch campuses can be broken down into two separate groups: campuses established under rules that specifically govern the setting up of foreign university branches in Thailand, or campuses that are established by overseas institutions through the normal process of setting up private HEIs.

Thailand's private higher education rules do not prohibit overseas investors from setting up a private educational institution. Webster University Thailand was an example of a branch campus which operated as "an extended international campus of Webster University based in St. Louis, Missouri in the USA" but was officially registered and accredited as a private Thai university. The university started operating in Thailand in 1997 but ceased operations in Thailand in December 2021.

Approval from MHESI is required to set up a private Thai university, while a branch campus has a more streamlined approval process through a special committee headed by MHESI. There are stronger incentives for a branch campus but also stricter requirements for the subjects that should be taught as well as where the campus should be located, as described in Section 4.2. However, fees are not regulated. Both branch campuses and private HEIs are expected to re-invest at least 70 per cent of profits into their respective institutions.

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<https://www2.rsu.ac.th/t/MEvent.aspx?Id=2022-NCUK-Thailand-Grand-Open-House>

Although guidelines on formal branch campuses were introduced in the Private Higher Education Act of 2003, no such campuses were approved until new policies encouraging these campuses were announced in 2017, which greatly simplified and streamlined the approval process. These policies are discussed further in Section 4.2.

According to MHESI, there are currently three branch campuses operating under the Thai Government Gazette in 2017, which was implemented to attract foreign institutions into establishing branch campuses in Thailand.

CMKL University

CMKL University, a partnership between Carnegie Mellon University (CMU) and King Mongkut's University of Technology (KMUTL), opened its doors to its first cohort of students in 2018. CMKL is an independent legal entity and is set up as a private institution. Students are recruited through Carnegie Mellon's own in-house application system and begin their programme at CMU in the US before moving to Thailand later in the course.

Students graduating from CMKL University will receive a Carnegie Mellon degree, after spending half of their time in the US and the other half in Thailand for the duration of their course. Teaching in Thailand is delivered by a combination of fly-in faculty from CMU and Thai faculty who have received their training in Pittsburgh.

Aside from the faculty, Carnegie Mellon also provides a dedicated space for students on the programme at their home campus. Meanwhile, infrastructure for students when in Thailand is provided by King Mongkut's University of Technology.

The initial programmes offered by the new branch campus were master's degree programmes in electrical and computer engineering, as well as in software engineering, and a PhD programme in electrical and computer engineering. These subject areas aligned with Thailand's 4.0 strategy, an essential requirement that must be met before an institution can be approved as a branch campus. The eventual goal then was for CMKL to expand into bachelor's degree provision through the offering of its own degrees rather than those awarded by Carnegie Mellon. Today, CMKL University offers single-degree programmes in Artificial Intelligence & Computer Engineering as well as in Technology & Creative Innovation.

The branch campus also benefits from tax exemptions for the university and tax rebates for industrial partners that provide funding for PhD students at the university. This support

allows the university to provide tuition-free PhD programmes, although master's degree students continue to pay fees in line with Carnegie Mellon's fee structure.

From the Thai partner's perspective, the main advantages to the cooperation include expanding opportunities for students, creating learning opportunities for Thai faculty members, as well as strengthening its reputation and global recognition.

The management of the CMKL University has added that in addition to initially leveraging adjunct faculty from university partners and main campus's faculty members, CMKL University recruits its own international faculty members for Thailand campus. The selection process is as rigorous as in the recruitment process at Carnegie Mellon University (CMU). This is crucial for the success of the programme and can contribute to the long-term sustainability. There are co-directors on both sides overseeing the selection process and ensure that the university get the right talents.

CMKL University teams also maintain active R&D projects and activities with the main campus so graduate students can continue working on their research regardless of the location. This is also another unique activity that facilitates faculty members on both sides to collaborate and learn from each other.

In addition to the degree programmes, CMKL University also co-hosts various other activities throughout the year with CMU including professional training & executive education programmes. CMKL University also hosts annual tech summits which bring together faculty members participating in the collaboration from the main campus to Bangkok and meet with industrial sponsors and partners as well as local faculty members.

Amata University

In 2018, the cabinet granted 'Amata University,' located at Amata Nakhon Industrial Estate in Chonburi province, the right to offer the Master of Science (MS) in Engineering (Intelligent Manufacturing Systems) programme from National Taiwan University (NTU). The programme aims to accommodate smart city development in Thailand's Eastern Economic Corridor (EEC) and develop human resources in science and technology to cope with the targeted 10 industries being promoted by the government. The two-year course will be delivered in Thailand, but will be aligned with the standards of NTU.

Asian Institute of Hospitality Management in academic association with Les Roches, Switzerland

The Asian Institute of Hospitality Management or AIHM was founded by Minors Hotel, in association with Les Roches. There are two campuses of AIHM - one in Bangkok and one in Pattaya, which is located in EEC. AIHM currently offers a degree programme in Global Hospitality Management, which will take 3.5 years or 7 semesters to complete using Les Roches' curriculum. Students have the option to stay in Thailand for the whole programme or spend 15 teaching weeks in the fourth semester at one of Les Roches' campuses in either Spain or Switzerland.





4.1.6 English-medium programmes at Thai universities

English-medium “international programmes” are common at Thai universities. These programmes are taught entirely by the local institution and a local degree is awarded, meaning that they do not actually meet the definition of transnational education. However, they are an important part of the internationalisation of Thailand’s higher education sector and should be taken into account when considering the potential for TNE in Thailand.

According to Study in Thailand, there are over 768 international programmes offered by Thai universities (both public and private) at undergraduate and postgraduate level. Assumption University, a private university, is the first university in Thailand offering all programmes in English. Some universities such as Mahidol University (public) and Bangkok University (private) have established independent international colleges that offer all courses in English. Simultaneously, some universities offer English or international programmes in parallel with their original Thai programmes using the same curriculum, ranging from STEM subjects to social sciences and humanities, as well as the same assessment, the same teaching team and the same facilities.

The acknowledgement procedure for English-medium degrees follows the same requirements as that of other university programmes. Thai authorities have a positive attitude towards these programmes, not only because they raise the level of internationalisation of students on the course but also because they help attract international students to Thailand.

4.2 Policies and government support for branch campuses

As discussed above, the Thai government has a relatively hands-off approach to most forms of transnational education in the country. Joint and dual degree programmes, as well as franchised degrees, are arranged between individual universities, and MHESI approval is a fairly straightforward process that depends only on the course contents. No government approval is needed for the setting of tuition fees or programme format. Branch campuses are the only form of TNE where government approval will be a significant issue.

4.2.1 Approval of branch campuses

The special approval process for setting up a branch campus in Thailand was announced in the Thai Government Gazette in 2017 to attract high-performing foreign institutions to establish branch campuses in Thailand. Applications to establish branch campuses under Article 44 was to be approved by a special committee. Despite changes in government and in the ministry structure, this regulation remains the same based on recent interviews with senior officers at MHESI.

These approvals are issued on a case-by-case basis, and discussions with MHESI show that the following factors are considered important for approval:

- The overseas partner should be a “renowned foreign higher education institution”. This term is not explicitly defined, but according to discussions with an interviewee from MHESI this will mainly depend on the university’s position in international rankings such as those in published by QS or Times Higher Education.
- In some cases, specific subject strengths could compensate for a lower overall ranking, depending on the details of the cooperation and the individual university. The application form for establishing a new branch campus specifically asks for input on the overall and subject-specific ranking of the overseas institution.
- Subject areas taught at the university should generally be in line with the 10 areas listed in the Thailand 4.0 economic development strategy. These include next-generation automotive; smart electronics; affluent, medical & wellness tourism; agriculture & biotechnology; food for the future; robotics; aviation & logistics; biofuels & biochemicals; digital; and medical hubs. Other subject areas can be approved on a case-by-case basis, based on the extent to which they support the development of the country.

- Government interviewees further clarified that branch campuses would not be allowed to offer subjects not aligned with development needs, even if the campus also offered subjects aligned with Thailand 4.0. This is to ensure that branch campuses serve Thailand's development needs rather than compete with domestic universities.
- The initial plan for branch campus approval was that these should be established in the Eastern Economic Corridor (EEC). It was later announced that exceptions could be made to this rule on a case-by-case basis as long as the campus was in partnership with a public Thai HEI; this exception was likely designed to accommodate Carnegie Mellon's joint campus in Ladkrabang on the outskirts of Bangkok. The Thai government has plans to expand economic corridors to other regions in Thailand, which will allow branch campuses to be established in more areas.
- A branch campus can be set up either as an independently-operated branch campus or a joint institute. Unlike other countries such as China, there are no requirements for branch campuses in Thailand to involve a local partner. However, officials interviewed by the British Council commented that a Thai university partner would be beneficial in terms of understanding the local education landscape, building links with local industry and recruiting students.
- The main requirement in terms of investment is that the branch campus should have sufficient land and infrastructure to carry out its operations; this land can either be owned, leased, or provided by the Thai partner.
- According to an official from the Board of Investment, the minimum level of investment is one million Baht (£25,000). This is unlikely to be a problem to a potential branch campus and is likely lower than the amount of working capital needed by a branch campus in practice.
- In a recent interview with a senior official from MHESI, the Ministry acknowledged the budgetary challenges particularly of new constructions but views the operational structures as in the cases of CMKL and Les Roches as cost-effective and advantageous for the overall advancement of Thailand's education system. According to their estimates, the establishment of a new branch campus costs around 300 and 500 million Baht (£7.5 -£12.5 million), but the branch campuses that have successfully been established in Thailand have succeeded in doing so with less than 10 million Baht (£250,000) because existing facilities were utilized.
- As communicated by a senior MHESI officer, there is a keen willingness by the Ministry to support similar endeavours going forward, reflecting the Thai government's support for individual foreign higher education institutions to deliver TNE at full capacity and with high autonomy. In this regard, branch campuses are viewed as a catalyst in the development of Thailand's education ecosystem. This model is seen to mitigate the need for students to incur unnecessary travel and living costs abroad, while at the same time has the ability to spur development of the higher education sector and human resources towards realizing Thailand's 4.0 policy.
- As discussed in Section 4.1, there is an alternative to the approval process for formal branch campuses in the form of the Private HEI Act of 2003, which sets out the requirements to form a domestic private higher education institution. Under this act, the only restriction on overseas involvement in these institutions is that at least 50 per cent of members of the University Council must be Thai citizens - in particular, there are no restrictions on foreign ownership or investment. To date, at least one overseas university (Webster University Thailand) has been established under this law (although the university is no longer in operation since 2021). Applications for new domestic private universities are assessed and approved by MHESI.



4.2.2 Incentives available to branch campuses

There are no published documents officially setting out the incentives for branch campuses in Thailand. Regulations and incentives remain the same since the regulation was announced in 2017 and include:

- Exemption from corporate income taxes
- Exemption from import taxes on goods and equipment used for teaching or research
- Exemption from value added tax and the specific business tax (a type of sales tax applied to other VAT-exempt businesses)
- Exemption from stamp duty on land transferred to the HEI

At the same time, it should be noted that private HEIs are not exempt from property taxes, which are charged on real estate. This is seen as a major burden by some private universities, as MHESI insists that prospective private universities hold a significant amount of land before they can receive approval.

A document issued by the Board of Investment (translated in Appendix 3) sets out slightly different incentives. The only listed tax incentives were exemption from corporate income taxes for a period limited to eight years and exemption from import taxes, with an additional 50 per cent discount on corporate income taxes for the following five years if the campus is established in one of the three EEC provinces.

Another form of support provided to private HEIs by the Thai government is in the form of loans. It is common for medium-sized or larger private HEIs to apply for government-subsidised loans for faculty development, the building of infrastructure and purchase of equipment. Loans for the latter two purposes are awarded on a matched-funds basis, i.e. the HEI must provide at least half the budget for a project from its own funds while the government provides a loan for the other half. Interest rates on these loans are lower than the rate offered by banks.

Subsidised student loans can also be considered as a form of support for private HEIs. However, the maximum loan amount for most subjects is between 50,000 and 90,000 Baht (£1,200 to £2,100) across the whole degree course, which is significantly lower than the cost of a TNE programme. In addition, although the loan can be used as partial payment for a programme with higher fees, most loans are earmarked for students from low-income families; this means that most recipients would probably not be able to cover the remaining portion of fees if they were to study at a branch campus.

Less directly, tax incentives are also available to local companies supporting higher education, such as through PhD funding.

Non-financial incentives listed in the Board of Investment's announcement included permission to hire skilled foreign professionals and specialists, permission for foreigners to buy land, permission to export currency, and other unspecified benefits.

Further incentives are also offered for investment in Thailand's Eastern Economic Corridor (EEC) - the special economic zone established in the provinces of Chachoengsao, Chonburi and Rayong. All three of these provinces are within a few hours' drive of Bangkok and rank among Thailand's top five provinces in terms of per-capita GDP.

Incentives available to branch campuses established in the EEC are in line with those for other businesses setting up in the region. These include:

- Exemptions to restrictions on foreign ownership of land
- Relaxed visa measures for overseas staff
- Lower rates of personal income tax for employees (top rate of tax is capped at 17 per cent)
- Exemptions from laws governing foreign exchange (allowing use of foreign currencies without conversion to Thai Baht)
- Other support and facilitation measures such as fast-track environmental impact assessments

Other incentives available to businesses established in the EEC include a limited-time exemption to corporate income tax, import tax exemptions and reductions in investment tax; these are likely superseded by specific tax provisions for branch campuses or private HEIs.

Despite these concessions, government interviewees were clear that the Thai government would not be open to direct financial subsidies or transfers of land to a branch campus, regardless of whether a campus is located in the EEC.

As with domestic private HEIs, branch campuses are expected to be established as non-profit institutions. However, this status has been interpreted flexibly in Thailand. A non-profit private HEI is expected to reinvest 70 per cent of any annual surplus (profit) into the HEI's further development, but the remaining 30 per cent can be remitted to the licensee (owner), either in Thailand or overseas.

4.2.3 Quality assurance requirements

Quality assurance policies for branch campuses are likely to be similar to those in both public and private Thai HEIs. Universities should conduct annual internal quality assessments, including a self-assessment report and an assessment by an auditing team, and report the results to MHESI.

These annual assessments are based on a framework covering nine areas:

1. Philosophies, Commitment and Objectives
2. Teaching and Learning
3. Student Development Activities
4. Research
5. Academic Services
6. Preservation of Art and Culture
7. Administration and Management
8. Finance and Budgeting
9. Internal Quality Assurance System and Mechanisms. Assessments are carried out at the institutional, faculty/department and programme level, but the details of the assessment system are left to individual universities.

Along with this annual self-assessment, both public and private universities are subject to external quality assessment every five years. This is carried out by the Office of the National Education Standards and Quality Assessment (ONESQA) and covers six areas:

1. Quality Graduates
2. Research and Innovation
3. Academic Service
4. Cultural Preservation
5. Institutional Management and Development
6. Internal Quality Assessment. Assessment is based on a combination of site visits and monitoring of statistical data.

Except for branch campuses, Thai regulations also call for domestic HEIs to conduct follow-up evaluations of international academic cooperation agreements, including joint and dual degree programmes, every three years. The reports of these assessments should be reported to MHESI.



5. Thailand's TNE market

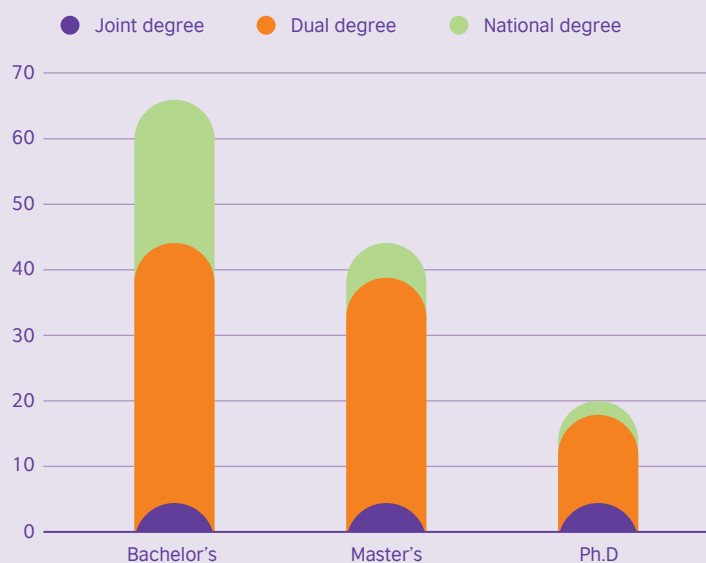
5.1 TNE Market Scale and Development

MHESI refers to TNE as collaborative programmes and classified these programmes into three categories: (a) Joint Degrees, denoting a single credential accredited by both Thai and foreign institutions; (b) Dual/Double Degrees, where students receive multiple degrees, each awarded independently by Thai and foreign institutions jointly designing and managing the curriculum; and (c) National Degrees, where students learn at both the Thai and overseas partner institution but earn a degree from only one institution as agreed by both institutions.

According to the latest information from MHESI⁸, there were 9 joint degree programmes, 84 dual degree programmes, and 33 national degree programmes. Among them, there are 14 TNE programmes conducted in collaboration with UK universities (Appendix 1).

Bachelor's degrees accounted for more partnerships than any other level of study. In total there were 40 dual degree partnerships at this level, along with 3 joint degree programmes, and 22 national degree programmes. Meanwhile, there were a total of 45 master's degree partnerships (35 dual degree, 3 joint degree, and 7 national degree programmes), and 20 at the PhD level (13 dual, 3 joint, and 4 national degree programmes).

Figure 5.1: Partnership types by level of study

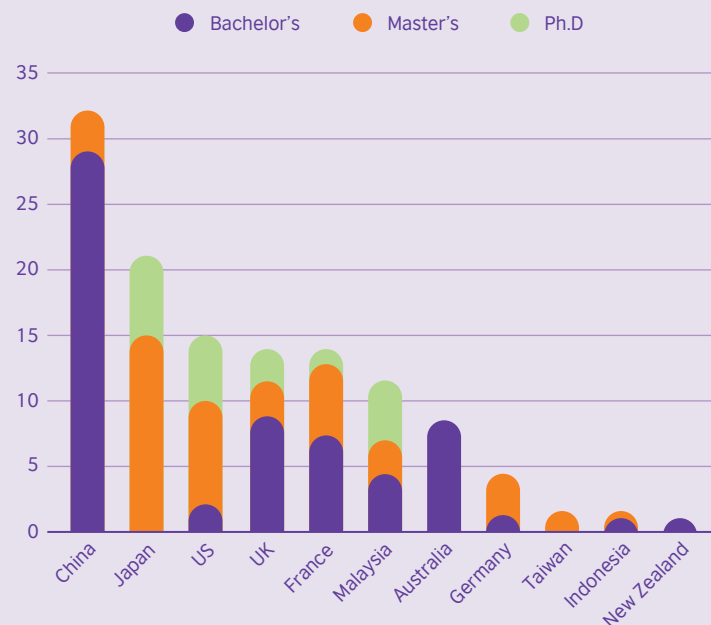


Source : MHESI

A look at MHESI's three categories of TNE (dual, joint and triple degree partnerships) shows that the UK is the fourth most popular partner country, with its universities involved in 14 different dual, joint as well as national degree partnerships listed by MHESI. This is behind China, Japan and the US, but ahead of Australia. There are distinctly different trends in the level of programmes offered in partnership with different countries; for example, a large majority of China-Thailand joint/dual/national degree partnerships are at the bachelor's level, while all partnerships with Japan are at postgraduate level.

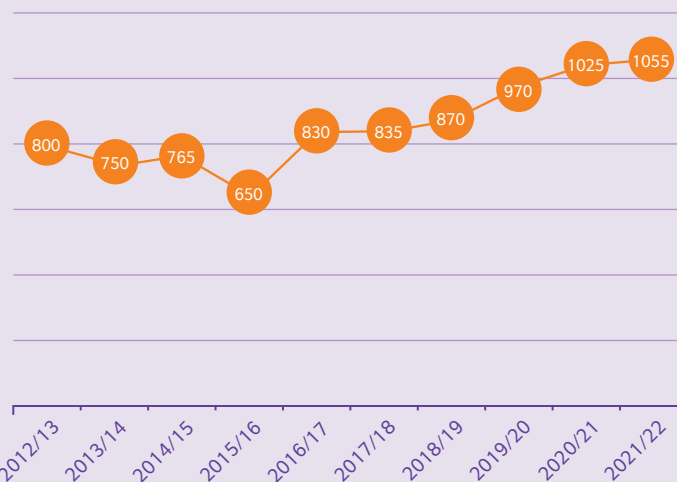
Based on HESA's data, Thailand's UK TNE market is still very small but has been growing steadily. In 2021/22, the number of UK TNE student enrolments from Thailand increased by 32% over the past 10 years and by 6% from just a year ago (2020/21). However, UK TNE enrolment from Thailand remains relatively small compared to Southeast Asia peers - in 2021/22, Thailand accounted for 1.2% of Southeast Asia's enrolments in UK TNE and only 0.6% of all East Asia's enrolments in UK TNE programmes, mostly unchanged in the last 10 years.

Figure 5.2: Leading partner countries by level of study



Source : MHESI

Figure 5.3: Enrolment in UK TNE Programmes from 2012-13 to 2021-22



Source : HESA

32%

Growth over the past 10 years in the number of UK TNE students from Thailand

1.2%

Share of Southeast Asia's enrolments in UK TNE

5.2 Tuition Fees

Domestic tuition fees in Thailand vary depending on the type of university, programme, subject area and level of study. Public universities have the lowest fees, typically around 40,000 to 60,000 Baht (£900 to £1,400) per year for an undergraduate programme, while private university fees start from 70,000 Baht (£1,600) per year and in some cases, can be significantly higher.

Meanwhile, fees for joint or dual degree TNE programmes are substantially more expensive, usually above 100,000 Baht per year (£2,300) for Thai citizens. These programmes, as well as English-medium “international programmes” offered by the Thai institution, are similarly priced, whether at public or private universities. Most of these programmes recruit international students in addition to Thai students, with international students paying higher fees.

5.2.1 Public Universities

Public Thai universities are mainly funded by the state, and therefore offer cheaper tuition fees than private institutions despite generally being better regarded in terms of quality. Fees at three of the country's large public universities - Chulalongkorn University, Thammasat University and King Mongkut's University of Technology Thonburi - range from around 156,000 to 306,000 Baht for a four-year degree programme, which is equivalent to around £900 to £1,800 per year, depending on subject and institution. Meanwhile, fees for master's degree programmes range from around £1,200 to £3,100 per year, again depending on the subject and university.



Figure 5.4: Annual tuition fees at selected Thai public universities (non-international programmes)

Institution	Programme	Average tuition fees (for Thai citizens)
Chulalongkorn University	Undergraduate degree	42,000 to 68,000 THB per year (£957 to £1,549)
	Master's degree	49,000 to 96,000 THB per year (£1,116 to £2,187)
King Mongkut's University of Technology Thonburi	Undergraduate degree	40,500 to 95,875 THB per year (£923 to £2,184)
	Master's degree	45,000 to 119,000 THB per year (£1,025 to £2,711)
Thammasat University	Undergraduate degree	36,000 to 104,000 THB per year (£820 to £2,369)

Sources: Chulalongkorn University, KMUT Thonburi, Thammasat University

5.2.2 Private University

In general, private Thai universities charge substantially higher fees than the price of an equivalent programme at their public counterparts, although prices can vary greatly from institution to

institution. Total tuition fees for a 4-year undergraduate degree programme at three major private Thai HEIs - Bangkok University, Assumption University and Rangsit University - range from 277,000 to 622,000 Baht, equivalent to between £1,600 and £3,600 per year.

Figure 5.5: Annual tuition fees at selected Thai private universities

Institution	Programme	Average tuition fees (for Thai citizens)
Assumption University	Undergraduate degree	120,112 to 832,637 THB per year (£2,736 to £18,969)
Bangkok University	Undergraduate degree	72,820 to 121,970 THB per year (£1,659 to £2,779)
Rangsit University	Undergraduate degree (except medical-related courses)	44,100 to 706,825 THB per year (£1,005 to £16,103)
	Undergraduate degree (medicine)	650,000 THB per year (£14,808)

Sources: Assumption University, Bangkok University, Rangsit University

5.2.3 International Programmes

As discussed in previous sections of this report, many Thai universities, including both public and private institutions, offer “international” programmes, which are taught in English by the Thai institution. These programmes attract higher fees than Thai-medium degree courses. International programmes are often marketed towards international students as well as Thai

citizens, with both public and private universities typically charging higher fees for overseas students than for locals.

At local Thai universities, course fees for international programmes can be much higher than for Thai-medium degrees. The price gap at private universities is comparatively smaller due to their higher fees for Thai-medium courses.

Figure 5.6: Annual tuition fees at selected Thai universities' international programmes

Institution	Programme	Average tuition fees (for Thai citizens)
Chulalongkorn University (Public)	Undergraduate international programme in business	251,000 THB (£5,718) per year
King Mongkut's University of Technology Thonburi (Public)	Undergraduate international programmes	103,250 to 262,500 THB per year (£2,352 to £5,980)
Rangsit University (Private)	Undergraduate international programme	152,610 THB per year (£3,477)
University of the Thai Chamber of Commerce (Private)	Undergraduate international programmes	143,912 THB per year (£3,279)
Mahidol University (Public)	Undergraduate international programmes (International College)	190,000 to 283,500 THB per year (£4,328 to £6,458)
Thammasat University (Public)	Undergraduate international programmes (all fields)	110,000 to 600,000 THB per year (£2,500 to £13,673)

Sources: Chulalongkorn University, KMUT Thonburi University, Rangsit University, and University of the Thai Chamber of Commerce, Mahidol University, and Thammasat University

5.2.4 Joint and Dual Degree Programmes

At most universities, the pricing for dual degree programmes, which involve study in Thailand and overseas is comparable to the cost of studying in an English-medium international programme in Thailand.

In comparison, the pricing for programmes where students are taught in Thailand by overseas academics is often somewhat higher than the price of the Thai university's own English-medium programmes. As with international programmes, many universities recruit international students to these joint or dual degree programmes, charging them higher fees compared to Thai students.

Figure 5.7: Annual tuition fees at selected joint & dual degree programmes

Partner Institutions	Programme	Tuition Fees (for Thai citizens)
Thammasat University & University of Nottingham (UK)	4-year (2+2) undergraduate Engineering programmes	Estimated total tuition fee for 2 years at Thammasat (5 semesters): £10,251 (THB 450,000) Final 2 years will be at University of Nottingham, UK
Mahidol University & University of Sussex (UK)	4-year (2+2) undergraduate programmes in Biomedical Science and Bioinnovation	150,000 Baht (£3,417) per year at Mahidol Final 2 years will be at the University of Sussex, UK
Prince of Songkla University & Middlesex University (UK) or University of Nottingham Malaysia Campus (Malaysia)	4-year (2+2) undergraduate programme in Business Administration	106,000 Baht (£2,414) per year at Prince of Songkhla University
Slipakorn University & Birmingham City University (UK)	4-year (4+0) undergraduate programme in Business Administration, delivered by both Thai and UK instructors	309,225 Baht (£7,045) per year No overseas component
Slipakorn University & Rennes School of Business (France)	4-year (3+1) undergraduate programme in Event & Leisure Marketing	193,175 Baht (£4,500) per year Fees in Thailand and France are the same
Srinakharinwot University & University of Nottingham (UK)	6-year (3+3) MD programme, including a 3-year BSc in the UK and a final three years at SWU	Approximately 400,000 baht (£9,113) per year at SWU for 4 th -6 th year
Assumption University & University of the West of England	1.5 year MSc in Marketing Communications (1 st semester at AU, 2 nd semester at UWE, 3 rd semester can be at either campus)	620,000 baht (£14,123) yearly

Sources: Thammasat University, Mahidol University, Prince of Songkla University, Slipakorn University, Srinakharinwot University, Assumption University

5.2.5 Branch Campus

The tuition fee at CMKL University (Carnegie Mellon's cooperation with King Mongkut's Institute of Technology Ladkrabang) is 271,000 Baht or approximately £6,800 per semester for a bachelor's degree, master's degree, and the PhD programme. The tuition fees for dual degrees is 918,000 Baht or approximately £22,950 per semester.

The Asian Institute of Hospitality Management (in academic association with Les Roches) offers various programmes at degree and non-degree levels. For the degree programme, there is only one programme: Bachelor of Business Administration in Global Hospitality Management. Fees for this programme range between 115,000 - 276,000 Thai Baht (2,600 - 6,200 GBP) a semester. There are seven semesters in total, bringing the total fees for this programme to around 1.4 million baht or 32,000 GBP over 3.5 years.

5.3 Thai university attitudes towards TNE

The British Council interviewed administrators and academics at four Thai HEIs, including both public and private institutions, to learn more about local universities' attitudes towards existing and new transnational education cooperations. Interviewees at all universities expressed positive attitudes towards TNE, and see joint and dual degree programmes as benefitting both students and the university itself; many were in favour of expanding their institution's TNE offerings.

From the student perspective, Thai universities see cooperative degree programmes as helping to improve the quality of education, in addition to creating an international environment and expanding their horizons. Most of the university interviewees commented that a major advantage of these programmes was that students could gain international experience and obtain an overseas degree without needing to spend the whole duration of the course abroad.

Allowing students to split their course between Thailand and the UK or another overseas destination is also a major advantage for universities. Administrators and academics responsible for TNE or international cooperation generally believe that joint and dual degrees do not compete directly with domestic programmes but are instead an alternative to a full overseas degree course. Rather than losing students to overseas universities, interviewees saw TNE partnerships as an opportunity to keep students in Thailand even if just for part of their course.

One interviewee elaborated that the higher price of their TNE programmes (both domestically and in the overseas leg of the course) means that they "cater" to a certain type of student, in particular those from a wealthier background and who may already have some international experience, and who would have likely chosen not to stay in Thailand if joint / dual degree programmes were not available. Another interviewee, at the private Assumption University (a private HEI), said that TNE could be a strategy to keep student numbers up and attract more international students in the face of a declining Thai student-age population.

Aside from retaining students in Thailand, universities see TNE cooperation as building their reputation and international connections. Working together with an overseas university on TNE is also seen as a good way of building links in other areas - several interviewees either said that working together on a TNE partnership had helped to develop research links with an overseas university or mentioned that they hoped to develop such links through the partnership. In turn, joint research with universities in the UK or elsewhere are seen as having the potential to lead to academic publications which will further increase the university's profile and international reputation.

Interviewees downplayed the attraction and importance of higher tuition fees for TNE partnerships, and one commented that their fees for joint degree courses were the same as those for students on non-TNE programmes. However, it is likely that this is also a factor for at least some Thai universities.

When discussing Thai universities' interest in future TNE partnerships, interviewees expressed positive attitudes. An interviewee from Assumption University said that the university would be particularly interested in 3+1 partnerships as this would allow them to keep students in Thailand for longer, but also conceded that a 2+2 partnership may be more attractive to students. This interviewee said that their university would be particularly interested in partnering in science-related subjects. Meanwhile, an interviewee at a leading public university, said that their university was looking to build more dual degree partnerships with prestigious overseas institutions but did not have particular priorities in terms of subject area or programme format.

When choosing whether to establish a partnership with a particular overseas university, the most important question, according to one interviewee, was "will this benefit our students?". Compatibility was the most important factor discussed by most Thai university interviewees. Curriculum compatibility, having similar and similar-sized departments, and the potential of partnerships opening up to joint research opportunities were all mentioned, as was previous cooperation - in one interviewee's experience, a successful dual degree in one subject area made that partner the first choice when it came to setting up a second partnership even if the new programme would be in a completely different field.

Meanwhile, the academic strength of the partner university was also a critical factor. This includes its overall reputation and ranking as well as expertise in the relevant subject area, benefitting students as well as the Thai institution in terms of brand-building. Other important factors included the support provided to students by the overseas partner, including practical support in areas such as finding accommodation as well as potential discounts or partial scholarships awarded to students articulating from the Thai university.

In contrast to joint and dual degree cooperation, there was less appetite from universities to work together on a full branch campus. Interviewees at King Mongkut's University of Technology had received positive feedback on their partnership with Carnegie Mellon University, but those at other institutions did not express strong interest in this style of partnership.

A survey conducted by the British Council in Thailand with 30 Thai universities in October 2023 reaffirmed that collaborative joint and double degree programmes remain the most preferable TNE modes. These programmes enable students to obtain degrees from both institutions, fostering an internationally recognised academic experience.

One key factor that determines the willingness to proceed with a TNE project is the subject areas in which partner universities have a common interest. UK universities could prioritise the subject areas that they specialize in (and are comparatively renowned for) and use them as an entry point, while being aware that popular courses for TNE in Thailand include business-related subjects, health science, science and technology that require advanced laboratory facilities, technology, and innovation.

Several recommendations were made by Thai universities in recent interviews:

- Consider TNE arrangements that offer new and alternative degrees and which focus on professional practices, rather than traditional academic programmes that rely primarily on research and dissertation write-ups
- Set up education and training platforms for adults, both working and retired persons, to be upskilled and reskilled in programmes that are certified by UK institutions
- Expand TNE delivery to short courses with certification. These are in demand and are more viable, allowing working persons to integrate their experiences and professional achievement with the curriculum and qualification pursued
- Promote funding and scholarship opportunities as Thailand is a price-sensitive market
- Consider ways for TNE to generate spillover effects more widely to those not directly participating in TNE, for example in fostering international research collaboration among academics and students at both partner institutions even though they are not directly involved in the TNE programme

Double degree programmes remain the preferred mode of TNE

5.4 Reasons to set up TNE in Thailand

The British Council interviewed academics and executives responsible for global engagement and TNE partnership development from five UK universities, all of which are at different stages in developing a TNE programme in Thailand. Some have been recently successful in developing a TNE programme in Thailand, some are new to TNE in Thailand, while some have tried for several years but continue to face barriers.

The UK universities interviewed are interested to partner with Thailand in TNE for the following reasons:

1. Whilst Thailand is perceived as a small to medium market for TNE compared to other countries in the region, TNE in Thailand will increase the diversity of students at their university.
2. To enhance their university's reputation amongst Thailand's network of universities and to sustain their work in Thailand both in terms of student recruitment and partnerships.
3. Compared to other countries in the region, there is still a room for TNE to grow in Thailand

In terms of TNE model, UK universities prefer a joint or a double degree because it responds well to the demand from both Thai universities and students. In addition, this model of collaboration can be achieved through a simpler and more straightforward process, and does not require large investments.

One UK university shared that they tried to work in partnership with Thai universities in delivering their distance learning courses as part of the Thai programme; however, this model was not well received.

Interviews with executives of UK universities reveal that they view branch campuses as having a low chance of succeeding. Given that Thailand is a relatively small market for UK universities, and the majority of Thai students have strong preference for first-hand international exposure overseas, the costs involved in the construction and operation of a branch campus in Thailand against the returns make it financially non-viable. No doubt awareness on the incentives granted to overseas institutions was low, UK institutions still deemed the risks and investments to be too high even with tax incentives given the market size.



One UK university recommended that as it can take time to develop a TNE programme, it might be worthwhile to start out with a smaller initiative such as a summer school where Thai students have the opportunity to experience UK education for a short period of time in the first instance. This is aligned with a Thai university's view that a public lecture by a UK university could be a good starting point in developing a TNE programme.

One of the difficulties UK universities face is in identifying the right partner with mutual interest both in terms of subject area(s) and mode of delivery. In addition, some UK universities are new to Thailand and are unaware of Thai regulations in setting up a TNE programme. The right partner and clear strategic direction from the Thai partner university are seen as the key success factors towards developing and implementing a successful and sustainable programme.

Another difficulty is the lack of continuity in discussions whenever changes occur - in the case of one UK university, discussions with a Thai university were upended following changes in management there.

5.5 Thai student and parent attitudes towards TNE

According to a recent survey with parents and students conducted by the British Council in October 2023 with 146 respondents, it was found that 65% of the respondents were not aware that UK qualifications are obtainable via a TNE programme. Parents had little understanding of what it would involve and commented that it was difficult for them to find information on TNE programmes. If available, the level of information was too basic and the course options too narrow to enable them to

make a decision. Nearly 20% of the respondents said they would not choose a TNE programme as they hold the view that a UK qualification must go hand-in-hand with a UK experience.

From the survey, the largest group of respondents were interested in studying in the UK (25%), followed by Thailand (17%), the US (15%), Australia (14%), and New Zealand (9%) respectively.

25 %
Of respondents said that they were interested in the UK

The top five subject areas include:

Health and Medicine	15.7%
Business	15.0%
Science and applied science	12.0%
Computing and mathematics	10.6%
Engineering and technology	8.8%

The top five reasons for choosing a TNE programme:

The programme helps save time
The programme enables students to stay with their families
Subjects and courses offered are interesting
Good reputation of the partner UK university
The programme helps save money

On the other hand, the main deterrents to enrolling in a TNE programme include:

Lack of information regarding the course and entry requirements	39.1%
Lack of opportunities to study and live in the UK	18.8%
Uncertainty regarding employer's recognition of the qualifications compared to a degree obtained by studying wholly in the UK	15.6%
Uncertainty if the programme is recognised by government bodies	7.8%
Lack of international networking	4.7%
Lack of confidence in teaching quality	3.1%

5.6 Barriers to setting up TNE in Thailand

Whilst the UK is the top study destination for Thai students and there are currently government policies in place to encourage TNE, the small market size and various other barriers prevent UK institutions from considering Thailand as a TNE market with strong potential.⁹

- Lack of clarity on TNE policies and long initiation process

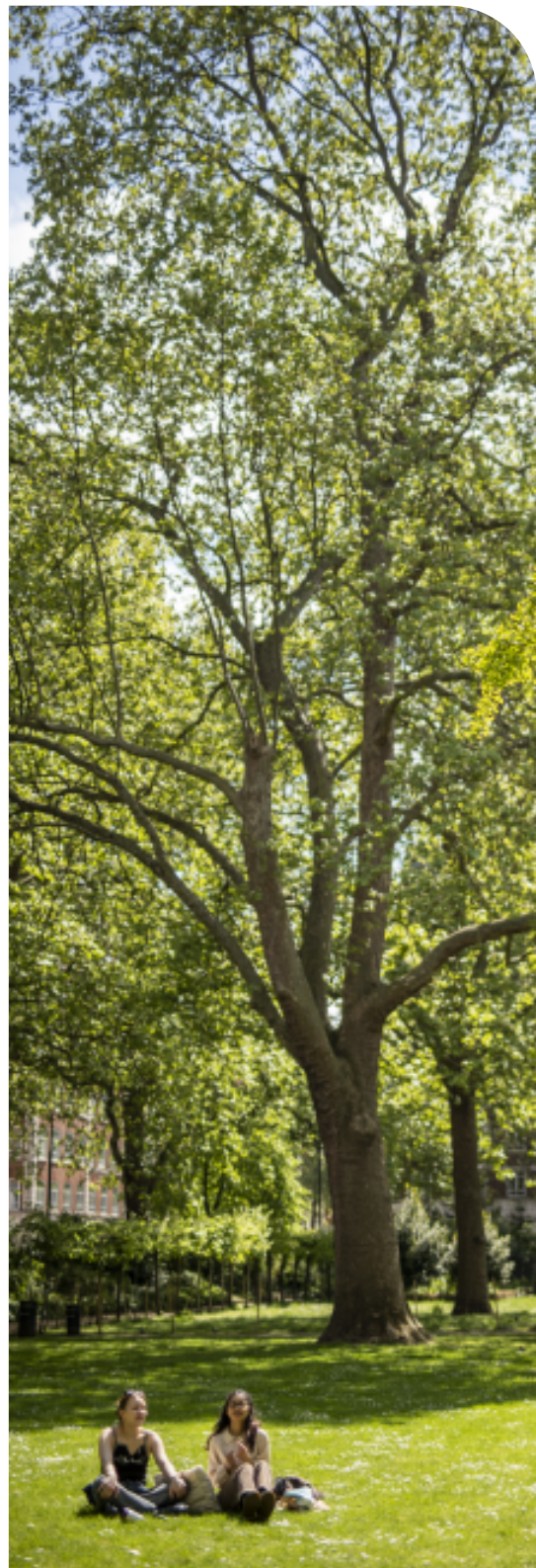
Information and data related to TNE in Thailand are currently lacking - UK universities are not fully aware of the policies and guidelines, while many Thai students (and parents) are not adequately informed about UK TNE programmes in the country. In addition, the development of a TNE programme in Thailand requires complex procedures in Thailand such as budgeting and financial planning, accreditation and regulatory compliance, quality assurance, and approval processes. These steps involve various bodies at the faculty, university and state level.

- Commitment from partners

Changes in personnel at both governmental and institutional levels often lead to discontinued policies and a recurring shift in focus, often at the expense of previous priorities. An interviewee from a UK university mentioned that their extensive year-long discussions on establishing a TNE programme at a Thai university were suspended because newly appointed executives opted not to proceed with the initiative.

- Shrinking young population and declining demand from Thai parents and students

One of the main concerns of universities in Thailand is the shrinking young population, which has resulted in the rising number of vacant places in some local universities. Such a situation may distract some Thai universities from prioritising a TNE partnership, although some others have said that a TNE partnership could help attract more students to the university. On the other hand, TNE might be perceived by some as competition, which may lead to a loss of students from the Thai university.



⁹

Especially if taken in the context of other markets in the region and globally that may be seen to demonstrate higher return on investment.

5,840

Thai students were enrolled in the UK in 2021-22, making Thailand a strong source markets for the UK, and reflecting Thailand's high regards for UK education as well as Thailand's potential for international education.



6. Conclusions

Thailand is an attractive market for international education, particularly for UK universities which are highly regarded in the country. It is one of the UK's top source markets, with over 5,840 Thai students studying in the UK in 2021-22. However, the country's TNE market is currently much smaller than its market for overseas study - excluding distance learning students, data from HESA shows that only 390 students were registered on UK degree programmes in Thailand as of the 2021-22 academic year. This is equivalent to only 7% of the total number of Thai students studying in the UK.

MHESI is the main authority governing TNE partnerships in Thailand. MHESI welcomes Thai and UK universities to work on TNE development and has no objections to UK-Thailand TNE partnerships. TNE is perceived by both MHESI and Thai universities as a means of internationalising Thailand's higher education sector.

The current model for transnational education in Thailand consists mainly of dual and joint degree programmes, offered in cooperation between Thai and overseas universities. Both public and private Thai universities appear to have an appetite for more cooperation along these lines. However, it is difficult to gauge the growth in the number of TNE partnerships in recent years because there is no updated and centralised information.

There may be room for more joint and dual degree partnerships between UK and Thai universities. Beyond academic strength and reputation (measured by the university's overall ranking as well as ranking in the relevant subject area), Thai universities look to partner with institutions that have compatible curriculums and that can offer strong support to their students once they move to the UK. As well, partners who can offer articulating students a discount on the full tuition fee for the programme, are preferred.

Aside from these joint and dual degree programmes, many Thai HEIs - including both public and private institutions - offer English-medium "international programmes" that recruit both Thai and international students. Articulation or credit transfer agreements can be set up with these programmes to allow students to transfer to the UK part-way through their course, and in some cases these are also the partners for dual or joint degree programmes.

Branch campuses are a newer development in Thailand. Although these have been possible for over a decade, none were established until 2017 when the approval process was significantly simplified. This has since resulted in the establishment of three branch campuses: Carnegie Mellon University and King Mongkut's University of Technology Ladkrabang, National Taiwan University and Amata University and the Les Roches at Asian Institute of Hospitality.

There may be room for more joint and dual degree partnerships between UK and Thai universities

Despite the simplified branch campus regulations launched in 2017, there are still some restrictions related to the ranking of the overseas universities, the location of campuses (currently restricted to the EEC), and the subject areas of programme offerings which need to be aligned with the 10 industries listed in Thailand's 4.0 policy. It is difficult to be clear about the exact incentives offered to branch campuses, as these are decided on a case-by-case basis. However, Thai officials clarified that the requirements for the approval of branch campuses would not be worse than for domestic private HEIs, which as non-profit bodies are not subject to corporate income tax and also receive exemptions from other taxes such as import taxes on equipment used for teaching or research. Although they are classed as non-profit, branch campuses would still be able to remit a portion of any earnings overseas. On the other hand, Thai officials were clear that incoming branch campuses would not receive direct grants of money or land.

Thailand's attractiveness as a TNE host country is also determined by the country's own international student population. This population is growing but is still dominated by nearby countries such as Myanmar and Cambodia, which are among the least developed economies in the region; the main exception here is China which is itself already a major TNE host country. In contrast to other nearby TNE hosts such as Malaysia or Singapore, there is likely to be less potential for international students to enrol on TNE programmes in Thailand, although there are reports on the ground that the numbers are growing.

In summary, simplifications to the process of establishing a branch campus in Thailand make this much easier than it was before 2017, but the large amount of investment may mean that the opportunity may still not be attractive for all UK universities. In contrast, rising student interest and positive attitudes among local universities means that joint and dual degree programmes could be an attractive option for a wider range of institutions.

Branch campuses established in the three provinces designated as the Eastern Economic Corridor can receive additional incentives similar to those offered for businesses investments in this region. These include exemptions to restrictions on foreign ownership of land, relaxed visa measures for overseas staff and lower rates of personal income tax for employees. In contrast to some initial announcements, branch campuses do not have to be located in the EEC and can be established anywhere in Thailand; however, a location in the EEC would be seen as a positive factor when an application to establish a branch campus is considered.

Another important requirement is that overseas institutions looking to set up branch campuses in Thailand must be "renowned foreign higher education institutions", which is based mainly on international rankings although exceptions can be made for universities that have strengths in specific subject areas.

Incentives for branch campuses include exemptions to restrictions on foreign ownership of land, relaxed visa measures for overseas staff and lower rates of personal income tax for employees



Appendix 1:

UK-Thailand collaborative degree programmes

National Degree Programme

Thai Partner	UK Partner	Level	Degree Awarded	Degtails
Thammasat Business School, Thammasat University	Northumbria University	Ph.D.	Bachelor of Science (Design, Business and Technology Management)	Thammasat University for 3.5 years and followed by period of study at Hong Kong Polytechnic University, in Hong Kong or Northumbria University, United Kingdom

Joint Degree Programmes

Thai Partner	UK Partner	Level	Degree Awarded	Details
Chulalongkorn University	School of Biomedical Sciences, University of Liverpool	Ph.D.	Ph.D. in Biomedical Sciences and Biotechnology (International Programme)	Students will spend a minimum of 6 months at each institution

Dual Degree Programmes

Thai Partner	UK Partner	Level	Degree Awarded	Details
Chulalongkorn University	University of Warwick	Master	Master of Engineering Management	Academics from The University of Warwick, United Kingdom teach at Chulalongkorn University
Kasetsart University	University of Westminster	Bachelor	Bachelor of Arts Honours in Tourism Management (Top-up)	Kasetsart University for 3 years and followed by University of Westminster for 1 year
Kasetsart University	University of Birmingham	Bachelor/ Master	Bachelor of Arts in Entrepreneurial Economics: EEBA (International Program)	Dual/Double degree bachelor's degree and master's degree. Kasetsart University for 4 years followed by University of Birmingham for 1 year to earn a master's degree from University of Birmingham
Kasetsart University	University of Portsmouth	Bachelor	Bachelor of Arts in Entrepreneurial Economics: EEBA (International Program)	Kasetsart University for 3 years followed by University of Portsmouth, United Kingdom for another year
Kasetsart University	University of Southampton	Diploma/ Bachelor/ Master	Bachelor/ Master of Arts in Entrepreneurial Economics: EEBA (International Program)	Kasetsart University for 3 years followed by University of Southampton for 1 year to earn Diploma of Higher Education in Economics from University of Southampton

Prince of Songkla University	Middlesex University	Bachelor	Bachelor of Business Administration in General Management (English Program)	Prince of Songkhla University for 2 years followed by The University of Nottingham, Malaysia or Middlesex University, United Kingdom for 2 years
Silpakorn University	Birmingham City University	Bachelor	Bachelor of Fine Arts in Digital Communication Design	Silpakorn University for all 4 years but lecturers from Birmingham City University will be responsible for teaching during the 4 th year
Srinakharinwirot University	De Montfort University	Bachelor	Bachelor of Engineering in Concert Engineering and Multimedia (International Programme)	Srinakharinwirot University for 2 years followed by De Montfort University, United Kingdom for 2 years
Srinakharinwirot University	University of Nottingham	Ph.D.	Doctor of Medicine (The Joint Medical Programme- Srinakharinwirot University and the University of Nottingham, UK)	Students will study Biomedical Science at the University of Nottingham, United Kingdom for 3 years and will be awarded the Bachelor Degree of Medical Sciences from the University of Nottingham. This would be followed by clinical studies at the Faculty of Medicine, Srinakharinwirot University. Upon completion of the clinical rotations, students will be awarded the Doctor of Medicine degree from Srinakharinwirot University
Thammasat University	Queen Mary University of London	Master	Master of Science in Aesthetic Medicine	Thammasat University for 1-2 year(s) followed by Queen Mary University of London for 1-2 years
Thammasat University	University of Nottingham	Bachelor	Dual bachelor's degree (Engineering) Twinning Engineering Programmes	Thammasat University for 2 years followed by a period of study at The University of Nottingham, United Kingdom
Walailak University	Middlesex University	Bachelor	Bachelor of Business Administration in Logistics Analytics and Supply Chain Management (International Program)	Walailak University for 3 years followed by Middlesex University for 1 year

Sources: Thailand's Ministry of Higher Education, Science, Research, and Innovation (latest data dated 2017/2018)

Appendix 2:

Criteria and conditions for branch campuses in Thailand (unofficial translation)

Criteria, types, methods and conditions for Internationally renowned higher education institutions seeking to provide education in Thailand

1. Internationally renowned higher education institutions seeking to provide education in Thailand
 - 1.1 Must be acknowledged in certain subject areas in the rankings by Quacquarelli Symonds (QS), Times Higher Education (THE) or other institutions that the Internationally renowned higher education institutions Education Development Committee approves.
 - 1.2 Must offer courses that are beneficial to and important for the development of Thailand as announced by the Committee. Details of such courses are as follows:
 - (1) A programme / subject area that develops human resources to support the 10 industries in the Thailand 4.0 initiative.
 - (2) If not a programme / subject area in (1), a new subject area / study branch that is needed for the development of the country in the future.
 - (3) Other programmes / subject areas that the Committee identifies.
2. Internationally renowned higher education institutions that are allowed to provide education in a higher education level in Thailand in any programme / subject area must offer courses that follow the same process and quality as those offered in their main campus in terms of curriculum, subject offering as well as academics.
3. Internationally renowned higher education institutions that wish to provide education at higher education level in Thailand must submit an application form together with relevant documents to the Sub Committee, asking for permission to set up in Thailand. The application form is provided by MHESI.
4. Internationally renowned higher education institutions must comply with the following conditions when providing education:
 - 4.1 They must operate only in the Eastern Economic Corridor (EEC) and cannot open a campus outside the area. Exception can be made if approved by the Committee and the provision is done together with Thai public higher education institutions in order to promote, support or develop education in EEC.
 - 4.2 They must provide appropriate service for the benefit of students' learning. Such service must be equal to what students in their main campus receive.
5. Once the cabinet has approved a an Internationally renowned higher education institution to provide education in Thailand, the latter must sign an agreement with the Committee.

Source: Board of Investment of Thailand

Appendix 3:

Incentives for branch campuses in Thailand (unofficial translation)

Investment incentive measures to promote education provided by Internationally renowned higher education institutions

Conditions

1. The institution must be a an Internationally renowned higher education institution. Foreign investments must be approved by the Internationally renowned higher education institutions Education Development Committee.
2. The institution must be located in the Eastern Economic Corridor zone or in other special economic zones that have been announced by cabinet as areas for Internationally renowned higher education institutions, or other areas as approved by the Committee.
3. The institution must follow the rules, processes and conditions that the Committee has approved.

Rights and benefits

1. Exempt from corporate income tax for 8 years without limit on the amount
2. Exempt from import customs for machines
3. Other non-tax rights and benefits, e.g. permission to bring in skilled professionals and specialists to work in an enterprise that receives investment promotion, permission for foreigners to buy land, permission to export currency, etc.
4. If an Internationally renowned higher education institutions is opened in the EEC zone, i.e. Chachoengsao, Chonburi and Rayong provinces, it will receive 50% tax reduction on the normal corporate tax for 5 years after the tax exemption has ceased.

Source: Board of Investment of Thailand

Appendix 4:

List of Thai universities under the new category by the new scheme' Reinventing Thai Universities led by MHESI.

1. Global and Frontier Research - 17 universities

- 1.1. Chulalongkorn University
- 1.2. Khon Kaen University
- 1.3. Kasetsart University
- 1.4. Chiang Mai University
- 1.5. King Mongkut's University of Technology Thonburi (KMUTT)
- 1.6. Suranaree University of Technology
- 1.7. Thammasat University
- 1.8. Naresuan University
- 1.9. Mahasarakham University
- 1.10. Mahidol University
- 1.11. Mae Fah Luang University
- 1.12. Walailak University
- 1.13. Silpakorn University
- 1.14. Prince of Songkla University
- 1.15. National Institute of Development Administration (NIDA)
- 1.16. Chulabhorn Graduate Institute
- 1.17. Vidyasirimedhi Institute of Science and Technology

2. Technology and Innovation - 19 universities

- 2.1. Thaksin University
- 2.2. King Mongkut's University of Technology North Bangkok (KMUTNB)
- 2.3. Rajamangala University of Technology Krungthep
- 2.4. Rajamangala University of Technology Tawan-ok
- 2.5. Rajamangala University of Technology Thanyaburi
- 2.6. Rajamangala University of Technology Phra Nakhon
- 2.7. Rajamangala University of Technology Rattanakosin
- 2.8. Rajamangala University of Technology Lanna
- 2.9. Rajamangala University of Technology Srivijaya
- 2.10. Rajamangala University of Technology Suvarnabhumi
- 2.11. Rajamangala University of Technology Isan
- 2.12. Princess of Naradhiwas University
- 2.13. Burapha University
- 2.14. Maejo University
- 2.15. Pibulsongkram Rajabhat University
- 2.16. Ubon Ratchathani University
- 2.17. Chitralada Technology Institute
- 2.18. King Mongkut's Institute of Technology Ladkrabang (KMITL)
- 2.19. Siam University

3. Area-Based & Community - 48 universities

- 3.1. Kalasin University
- 3.2. Nakhon Phanom University
- 3.3. University of Phayao
- 3.4. Kanchanaburi Rajabhat University
- 3.5. Kamphaeng Phet Rajabhat University
- 3.6. Chandrakasem Rajabhat University
- 3.7. Chaiyaphum Rajabhat University
- 3.8. Chiang Rai Rajabhat University
- 3.9. Chiang Mai Rajabhat University

- 3.10. Thepsatri Rajabhat University
- 3.11. Dhonburi Rajabhat University
- 3.12. Nakhon Ratchasima Rajabhat University
- 3.13. Nakhon Si Thammarat Rajabhat University
- 3.14. Nakhon Sawan Rajabhat University
- 3.15. Bansomdejchaopraya Rajabhat University
- 3.16. Buriram Rajabhat University
- 3.17. Phranakhon Rajabhat University
- 3.18. Ayutthaya Rajabhat University
- 3.19. Phetchabun Rajabhat University
- 3.20. Phuket Rajabhat University
- 3.21. Rajabhat Maha Sarakham University
- 3.22. Yala Rajabhat University
- 3.23. Roi Et Rajabhat University
- 3.24. Rajabhat Rajanagarindra University
- 3.25. Rambhai Barni Rajabhat University
- 3.26. Lampang Rajabhat University
- 3.27. Loei Rajabhat University
- 3.28. Valaya Alongkorn Rajabhat University
- 3.29. Sisaket Rajabhat University
- 3.30. Sakon Nakhon Rajabhat University
- 3.31. Songkhla Rajabhat University
- 3.32. Suratthani Rajabhat University
- 3.33. Surindra Rajabhat University
- 3.34. Muban Chombueng Rajabhat University
- 3.35. Udon Thani Rajabhat University
- 3.36. Uttaradit Rajabhat University
- 3.37. Ubon Ratchathani Rajabhat University
- 3.38. Suan Dusit University
- 3.39. Srinakharinwirot University
- 3.40. Institute of Community Colleges
- 3.41. Vongchavalitkul University
- 3.42. The Eastern University of Management and Technology
- 3.43. North Eastern University
- 3.44. Hatyai University
- 3.45. College of Asian Scholars
- 3.46. Pitchayabundit College
- 3.47. Santapol Technological College
- 3.48. Learning Institute For Everyone

4. Moral & Intellectual Cultivation - 2 universities

- 4.1. Mahachulalongkornrajavidyalaya University
- 4.2. Mahamakut Buddhist University

5. Specialized & Professional - 18 universities

- 5.1. Nakhon Pathom Rajabhat University
- 5.2. Phetchaburi Rajabhat University
- 5.3. Suan Sunandha Rajabhat University
- 5.4. Ramkhamhaeng University
- 5.5. Srisavarindhira Thai Red Cross Institute of Nursing
- 5.6. Pathum Wan Institute of Technology
- 5.7. Arsom Silp Institute of The Arts
- 5.8. Princess Galyani Vadhana Institute of Music
- 5.9. Kasem Bundit University
- 5.10. Rajapruk University
- 5.11. Dhurakij Pundit University
- 5.12. The Far Eastern University
- 5.13. Huachiew Chalermprakiet University
- 5.14. St Theresa International College
- 5.15. Kantana Institute
- 5.16. Navamindradhiraj University
- 5.17. Bunditpatanasilpa Institute of Fine Arts
- 5.18. Southeast Bangkok College

