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Gauging Thailand's TNE demand and market potential in neighbouring countries

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Southeast Asia on a shoestring budget

*A whirlwind tour of opportunities in Thailand, Myanmar and Cambodia*

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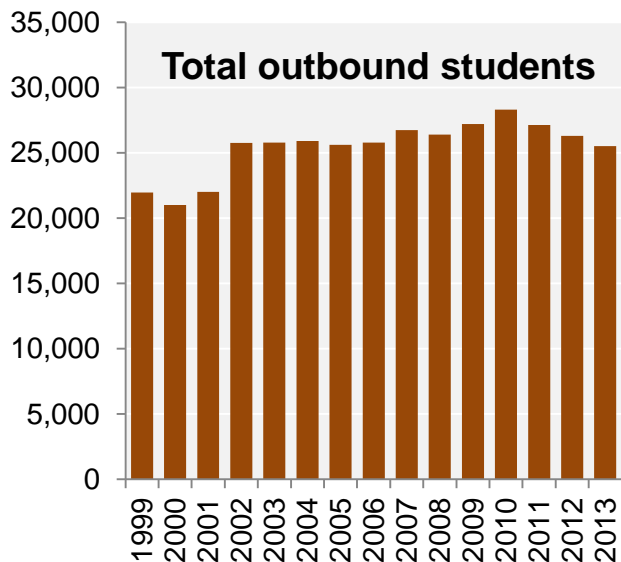




- I. Diverging mobility stories
- II. TNE opportunities
- III. Key factors to watch

# I. Diverging mobility stories: Thailand

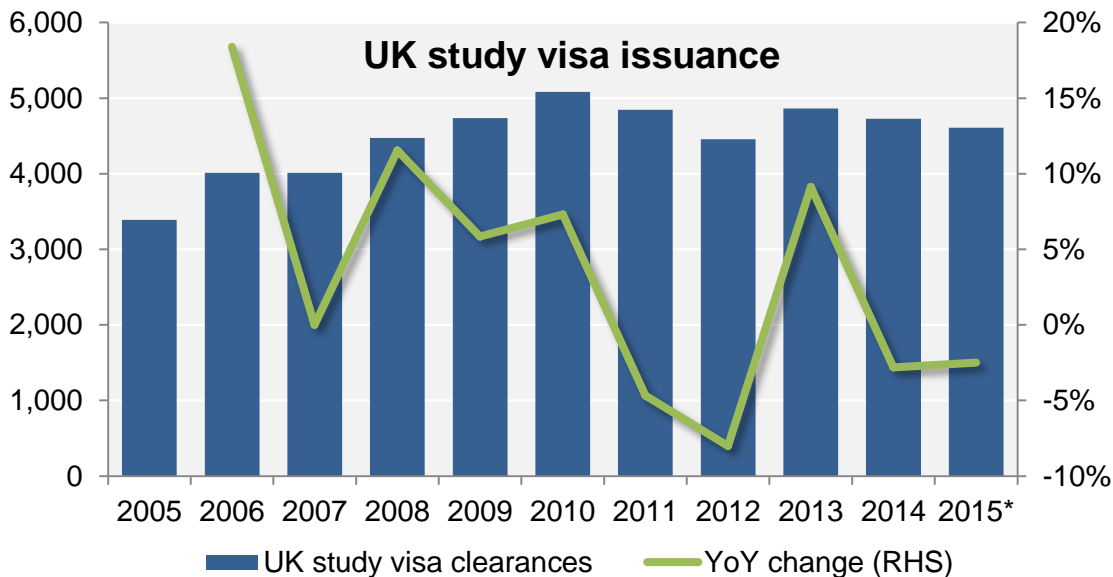
*Thailand is a mature market...*



Source: UNESCO

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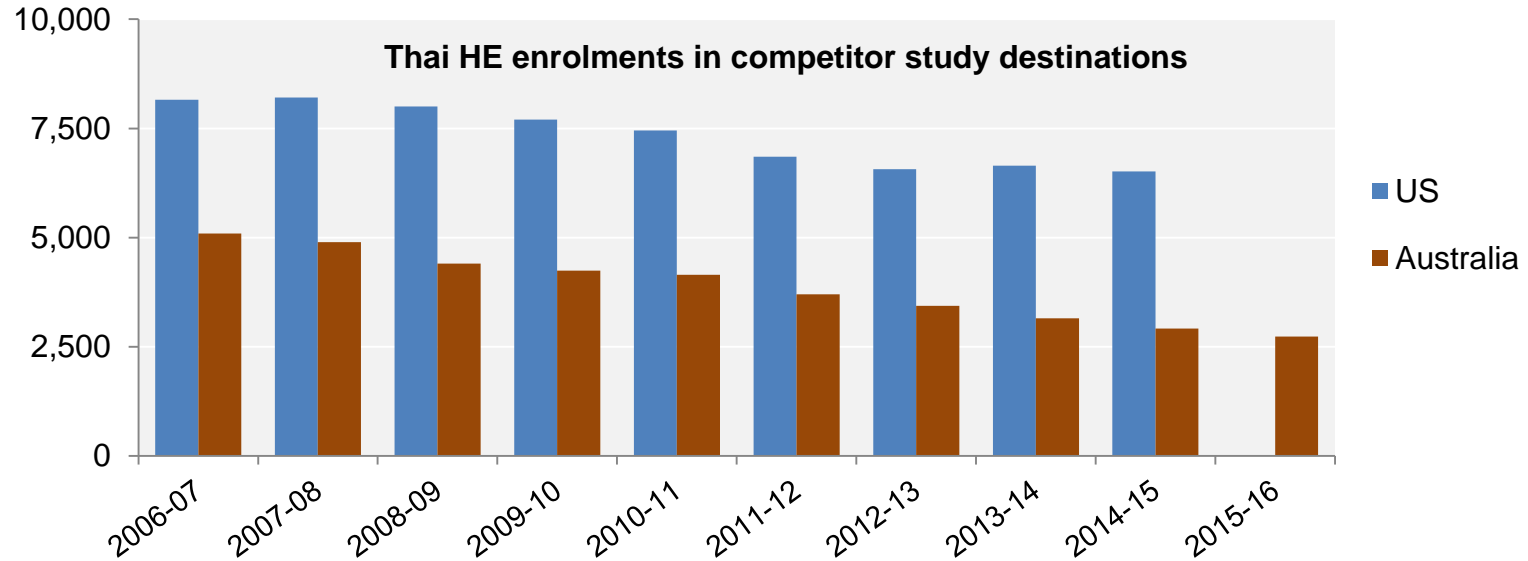
*...and UK numbers have faltered since 2010*



Source: UKVI

# I. Diverging mobility stories: Thailand

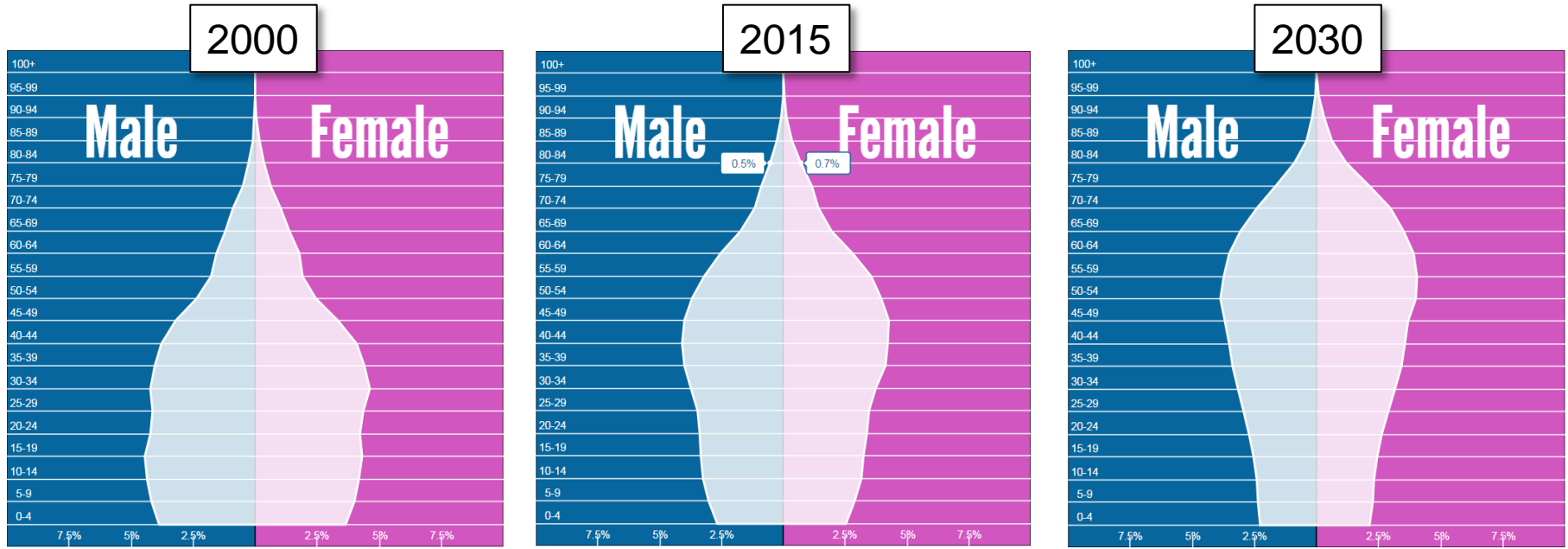
*But major competitors aren't doing any better*



Sources: US Institute for International Education, Australian Department of Education and Training

# I. Diverging mobility stories: Thailand

*A rapidly ageing Asian tiger...*



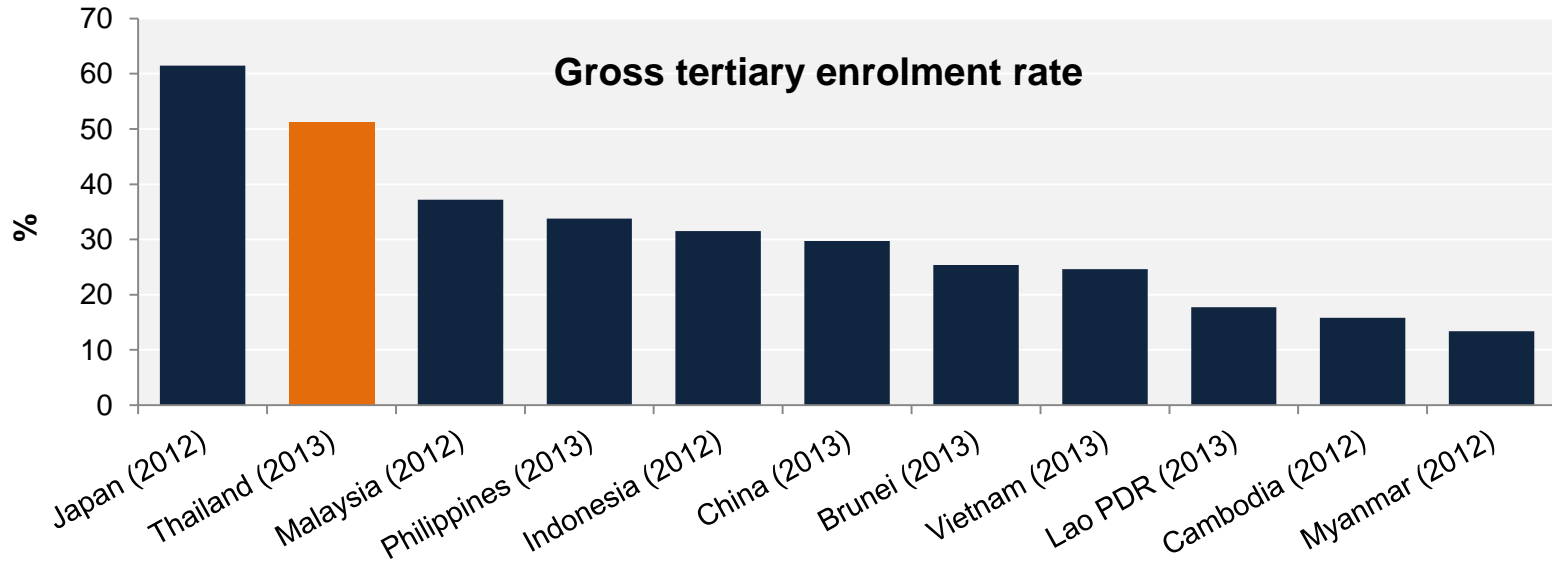
Source: [www.populationpyramid.net](http://www.populationpyramid.net)

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# I. Diverging mobility stories: Thailand

*A rise in progression rates is not likely to offset the demographic trend*

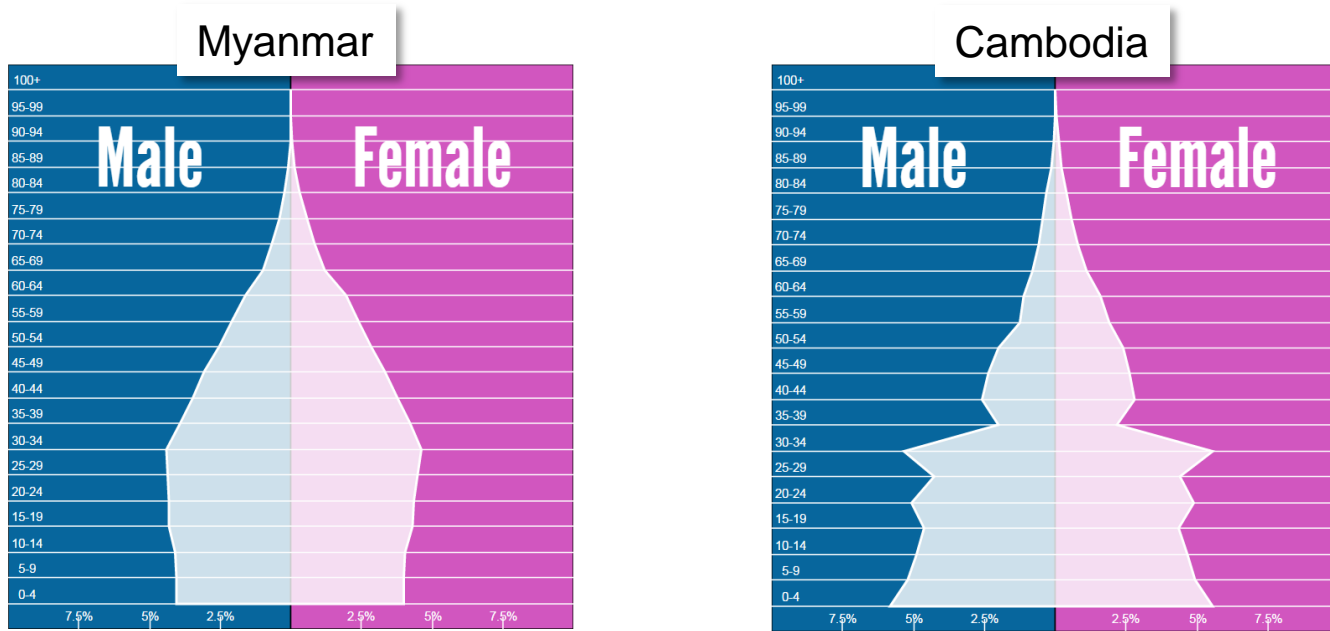


Source: World Bank



# I. Diverging mobility stories

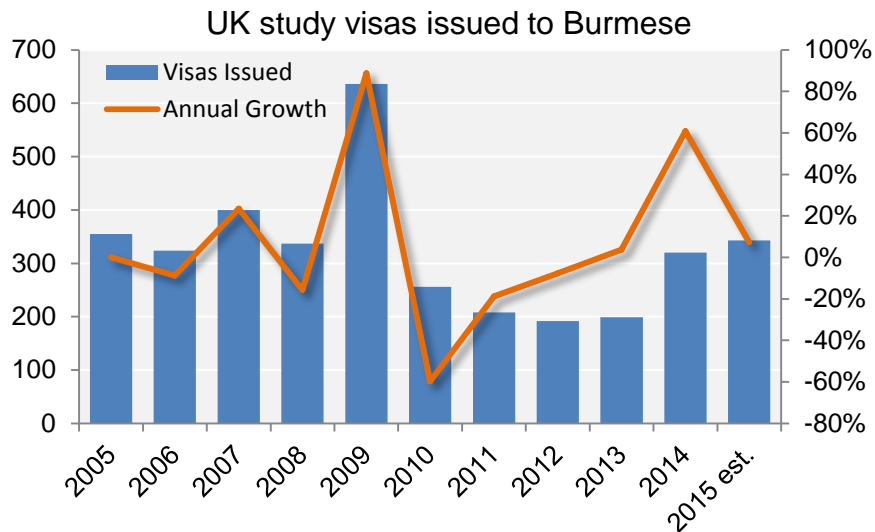
*By comparison, Myanmar and Cambodia have demographic dividends*



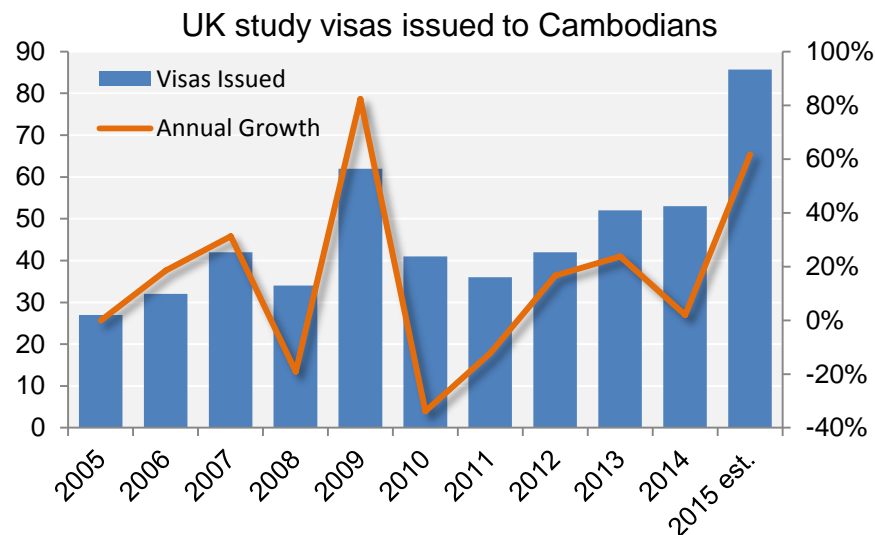
Source: [www.populationpyramid.net](http://www.populationpyramid.net)

# I. Diverging mobility stories

*But both markets are a long way from living up to their mobility potential...*

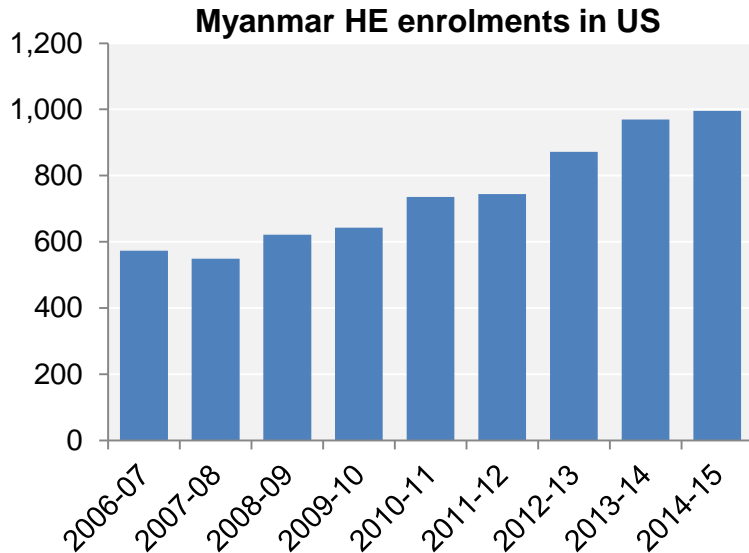


Source: UKVI

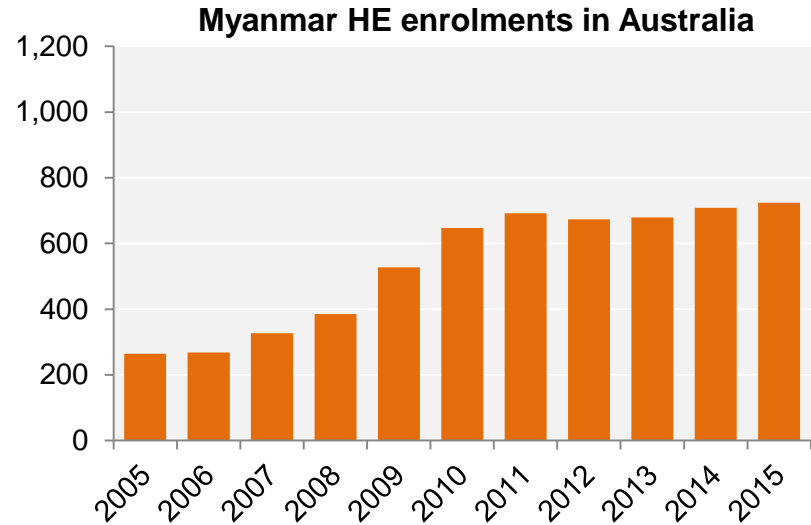


# I. Diverging mobility stories

*Myanmar enrolments in the US and Australia showed similar pattern of weak growth*



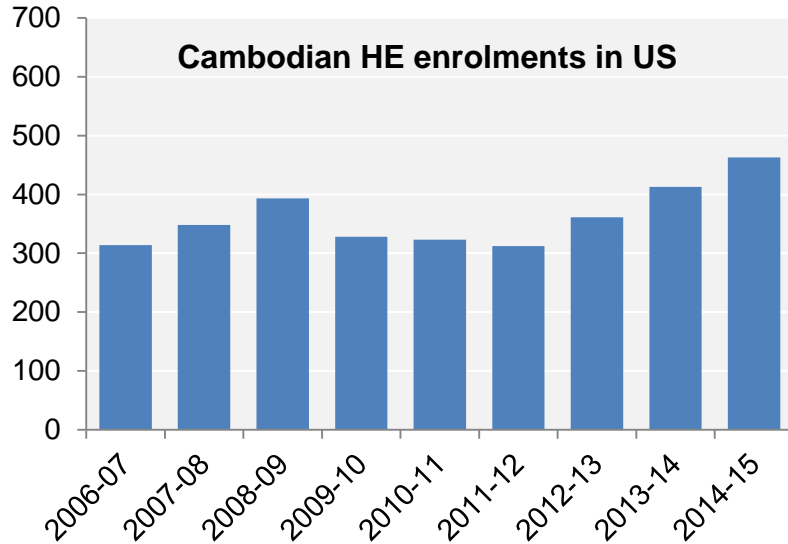
Sources: US Institute for International Education



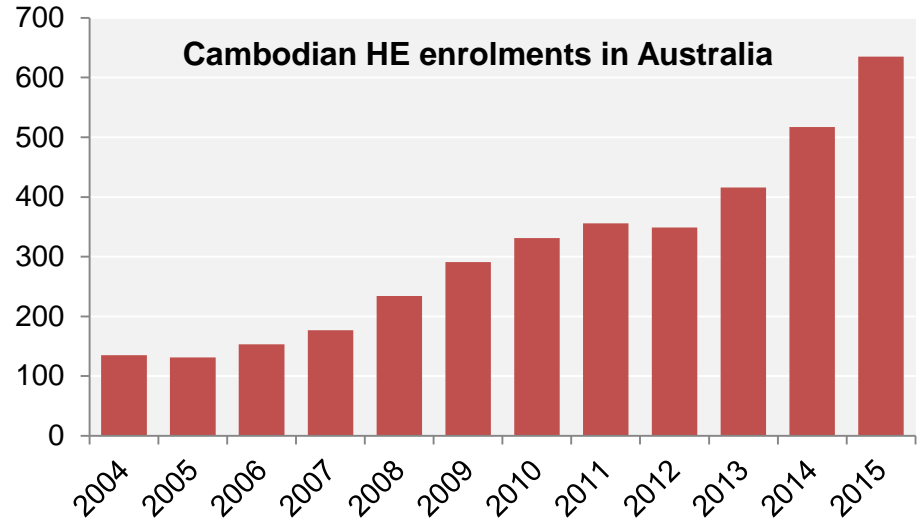
Source: Australian Department of Education and training

# I. Diverging mobility stories

*Cambodian enrolments in Australia grew sharply in 2015*



Source: US Institute for International Education



Australian Department of Education and Training

- I. Diverging mobility stories
- II. **TNE opportunities**
- III. Key factors to watch

## II. TNE opportunities: Thailand

| Opportunities  | Challenges  |
|--|---|
| <ul style="list-style-type: none"><li>• Thai universities have a goal of international recognition</li><li>• Study abroad experience is a bonus addition to a local degree</li><li>• Increasing number of international schools and international programmes</li><li>• One of top three hosts of international students in SE Asia</li></ul> | <ul style="list-style-type: none"><li>• Low English proficiency challenge to 2+2 arrangements</li><li>• Expectation of two-way mobility</li></ul> |

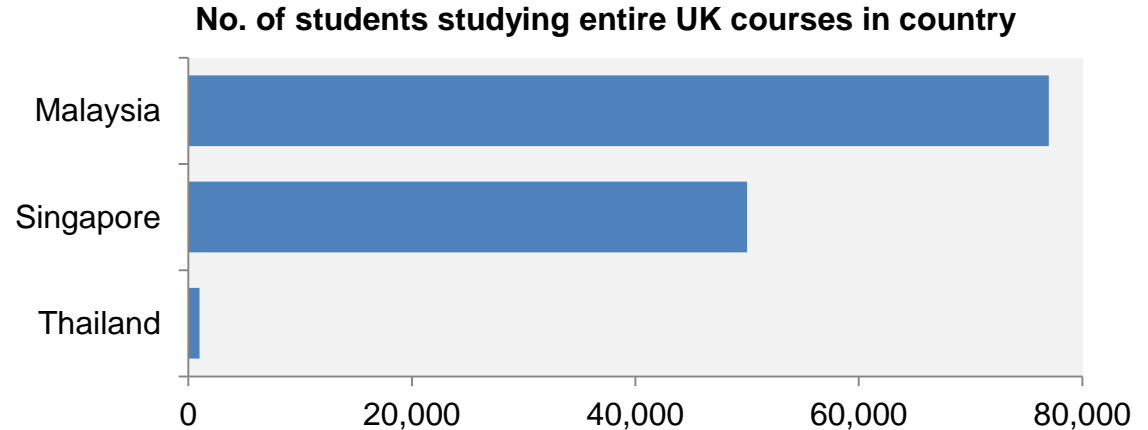
## II. TNE opportunities: Thailand

*The Thai TNE market is focused on collaborative degrees*

### **Growing number of collaborative degree programmes\***

- 7 joint degrees
- 56 dual degrees
- 78 national degrees
- 17 'other'

Source: OHEC



Source: HESA

## II. TNE opportunities: Thailand

### *Where are the opportunities?*

**156 institutions under Office of Higher Education Commission**

**19** autonomous universities

**62** state universities:

- 15 universities
- 38 Rajabhat universities
- 9 Rajamangkhala universities

**75** Private colleges, institutes, and universities



## II. TNE opportunities: Myanmar

| Opportunities  | Challenges   |
|--|--|
| <ul style="list-style-type: none"><li>• High demand for HND</li><li>• Demand for top-up qualifications</li></ul> | <ul style="list-style-type: none"><li>• Shortage of qualified local teaching staff</li><li>• No regulatory environment in place for private education</li><li>• Foreign investment rules not fully clarified</li><li>• Identifying local partner entails high degree of risk</li></ul> |

## II. TNE opportunities: Cambodia

| Opportunities  | Challenges  |
|--|---|
| <ul style="list-style-type: none"><li>• Rapid growth in demand for HE</li><li>• Increasing number of international programmes offered at public HEIs</li><li>• Industry consortiums</li><li>• A growing upper-middle class</li><li>• Signs of improved administration</li><li>• Premium foreign education showing some early success</li></ul> | <ul style="list-style-type: none"><li>• Low tuition fees</li><li>• Few quality feeder institutions</li><li>• UK profile trails competitors</li><li>• Lack of qualified teachers</li></ul> |

- I. Diverging mobility stories
- II. TNE opportunities
- III. **Key factors to watch**

## Key factors to watch: Thailand

- Increasing internal competition due to demographic shift
- Institutions that can recruit regionally strongest
- ASEAN integration?

## Key factors to watch: Myanmar

- How will the new government take forward current education reform plans?
- Can the government live up to administrative demand
- Status of the private and higher education laws
- Will scholarship schemes be expanded?

## Key factors to watch: Cambodia

- Actual benefits from ASEAN integration
- Efforts to curb corruption
- Success of premium private institutions

# Closing thoughts



# Questions?

*British Council's **Services for International Education Marketing** (SIEM) team helps UK institutions refine their internationalisation strategies to succeed in East Asia and around the globe. Please get in touch if you would like to learn more.*

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