

An aerial photograph of Bangkok, Thailand, taken at sunset. The Chao Phraya River flows through the city, reflecting the golden light of the setting sun. Several prominent skyscrapers, including the Baiyoke Tower, stand out against the hazy sky. The foreground shows a mix of modern high-rise buildings and older, lower-density urban structures.

TRANSNATIONAL EDUCATION IN THAILAND

Exploring Opportunities for the UK

An Insights & Consultancy Feature Report

This report was created by the British Council's Insights & Consultancy team, which is dedicated to providing UK institutions with unparalleled data and analysis to drive their international education strategies and activities. If you would like to know more about our global services, please contact us at insightsandconsultancy@britishcouncil.org.

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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Content

1.	EXECUTIVE SUMMARY	6
2.	INTRODUCTION AND RESEARCH METHODOLOGY	8
3.	MACRO ENVIRONMENT	9
	3.1 Economic & demographic background	9
	3.2 Higher education in Thailand	11
4.	TRANSNATIONAL EDUCATION IN THAILAND	14
	4.1 Mode of TNE delivery	14
	4.2 Policies and government support for branch campuses	21
5.	THAILAND'S TNE MARKET	28
	5.1 TNE market scale and development	28
	5.2 Tuition fees	31
	5.3 Thai university attitudes towards TNE	37
	5.4 Thai student attitudes towards TNE	39
6.	CONCLUSIONS AND POTENTIAL FOR FUTURE COOPERATION	41
	Appendix 1: UK-Thailand collaborative degree programmes acknowledged by OHEC	44
	Appendix 2: Criteria and conditions for branch campuses in Thailand (unofficial translation)	46
	Appendix 3: Incentives for branch campuses in Thailand (unofficial translation)	47

1. Executive Summary

- Transnational education (TNE) in Thailand is still relatively undeveloped, especially given the large number of Thais studying at UK universities each year.
- The current main mode of TNE delivery in the country is joint and dual degree programme cooperation between Thai and overseas universities, but last year (2017) Thailand's Minister of Education announced plans to encourage "high-potential" 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 reasons including "the sake of the reforms in any field" without going through the normal legislative process. Approvals are judged by a committee headed by the Minister of Education.
- Incentives for branch campus are decided on a case-by-case basis but will be no worse than those for non-profit private HEIs, which includes exemption from taxes such as corporate income tax. Additional incentives for institutions which are set up in the "Eastern Economic Corridor" - three provinces in the East of the country which have been targeted for support in attracting foreign investment, include exemptions to 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 in published by QS or Times Higher Education.
- So far, two new branch campuses have received approval under the new policy – a cooperation between Carnegie Mellon University and King Mongkut's Institute of Technology Ladkrabang, and a solely-operated branch campus of National Taiwan University.
- Although Thailand does not have any other formally recognised branch campuses, 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 is officially registered as a private Thai university but describes itself as "an extended international campus of Webster University".
- Aside from branch campuses, current TNE in Thailand includes distance learning programmes and joint and dual degree partnerships. Joint and dual degree partnerships do not require formal approval from Thai authorities but in practice universities find it important to apply for acknowledgement from the Office of the Higher Education Commission (OHEC) as this allows graduates to work in government departments and public-sector bodies. The acknowledgement process is relatively straightforward and based on the contents covered by the new programme's curriculum.

- According to the more recently published list of programmes, there were a total of eight active joint degree programmes and 79 dual or triple degree programmes at Thai HEIs in the 2015/16 academic year. 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 overseas university 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. In some cases the dual degree partnership is established with the Thai university's international programme.
- 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 they can help develop Thai universities' reputation and international connections. It is likely that higher tuition fees 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 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 higher-quality education, prestige of the 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, perhaps because these could be seen as direct competitors should the students stay in Thailand for their whole course. Agents also felt that branch campuses may be a tough sell to students given the lack of awareness of 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 home 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.

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 6,680 Thai students studied in the UK in the 2016-17 academic year. However, the country has historically been less prominent in terms of transnational education (TNE), with less than 1,000 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 325 on in-person programmes.

In May 2017 Thailand announced plans to encourage “high-potential” overseas universities to set up branch campuses in the country, especially in the Eastern Economic Corridor (EEC) – a special economic zone covering three provinces close to Bangkok. This was followed a few months later by announcements that two overseas universities – Carnegie Mellon University from the US and National Taiwan University – would set up branch campuses in the country. These are the first officially recognised branch campuses to be established in Thailand.

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 has conducted research consisting of a combination of desk-based research, telephone interviews and in-person 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 potential to do so.
- Interviews with relevant government officials, to understand the relevant policies and potential future changes.

Key research topics include current policies related to TNE, including 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; and university attitudes towards future TNE cooperation.

3. Macro environment

3.1 Economic & demographic background

Thailand is an upper-middle income country with a per-capita GDP of around US\$5,900 in 2016 – somewhat lower than neighbouring Malaysia and nearby China, but several times higher than its other three neighbours Cambodia, Laos and Myanmar, as well as most fellow ASEAN members including Vietnam and Indonesia.

Thailand's economy has seen real (inflation-adjusted) GDP growth of 36 per cent between 2006 and 2016, equivalent to around 3.2 per cent per year, which is below that of the wider ASEAN region over the same period. The country's current economic development strategy is "Thailand 4.0", focusing on developing high-value and high-technology sectors to transform Thailand into a high-income nation. The strategy focuses specifically on 10 strategic industries: five "First S-Curve" industries which will develop over the short to medium term plus another five "New S-Curve" industries for longer-term development.

Figure 3.1: Priority industries in "Thailand 4.0"

First S-Curve: Enhance current industries	New S-Curve: Develop future industries
Next-generation automotive	Robotics
Smart electronics	Aviation & logistics
Affluent, medical & wellness tourism	Biofuels & biochemicals
Agriculture & biotechnology	Digital
Food for the future	Medical hubs

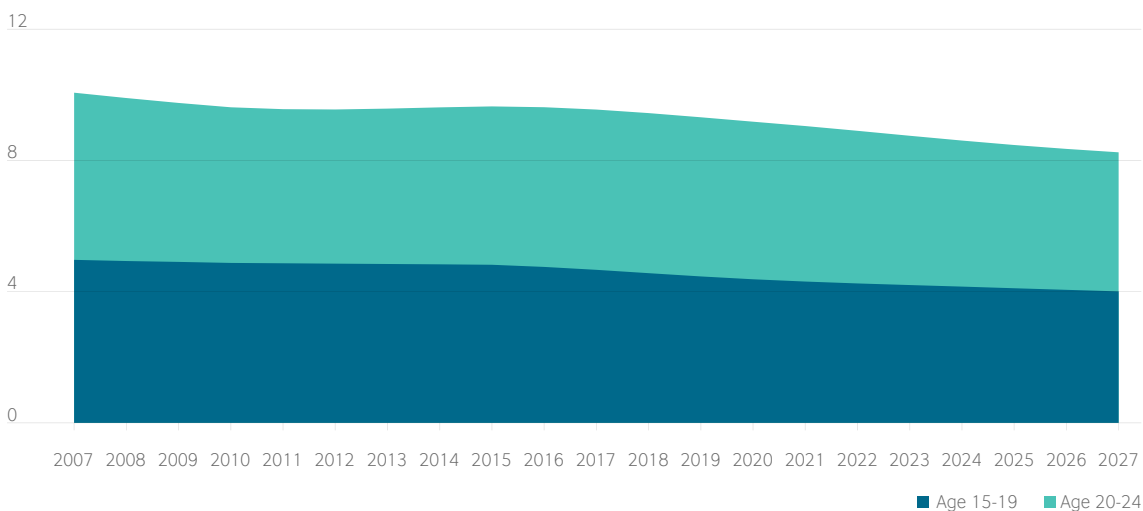
Source: Ministry of Industry

The government provides incentives for companies to invest in development in 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, innovation and the development of expertise in the 10 S-Curve sectors, known as the Fund for Enhancement of Competitiveness for Targeted Industries.

Another important policy is the 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 S-Curve industries, and investment incentives include similar tax exemptions and deductions including exemption from import tax for relevant equipment and time-limited exemptions for corporate income tax; infrastructure investment in the EEC provinces will also help to attract new investment. Other important incentives for overseas companies include support with visas and more liberal land ownership policies.

Demographically, Thailand is facing a significant decline in its student-age population. As of 2017, the number of 15- to 24-year-olds in the country had already fallen by more than 20 per cent compared to its 1991 peak, and the UN Population Division forecasts a further 14 per cent drop over the next decade.

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



Source: UN Population Division

3.2 Higher education in Thailand

Thailand is currently home to 59 public universities, 23 autonomous universities (publicly-funded universities with greater freedom of operation) and almost 100 private universities, colleges and institutes. Higher education is currently governed by the Office of the Higher Education Commission (OHEC) under the Ministry of Education, but according to local media reports there are plans to merge this instead with the Ministry of Science and Technology to form a new Ministry of Research and Higher Education before the current government cedes power in 2019.

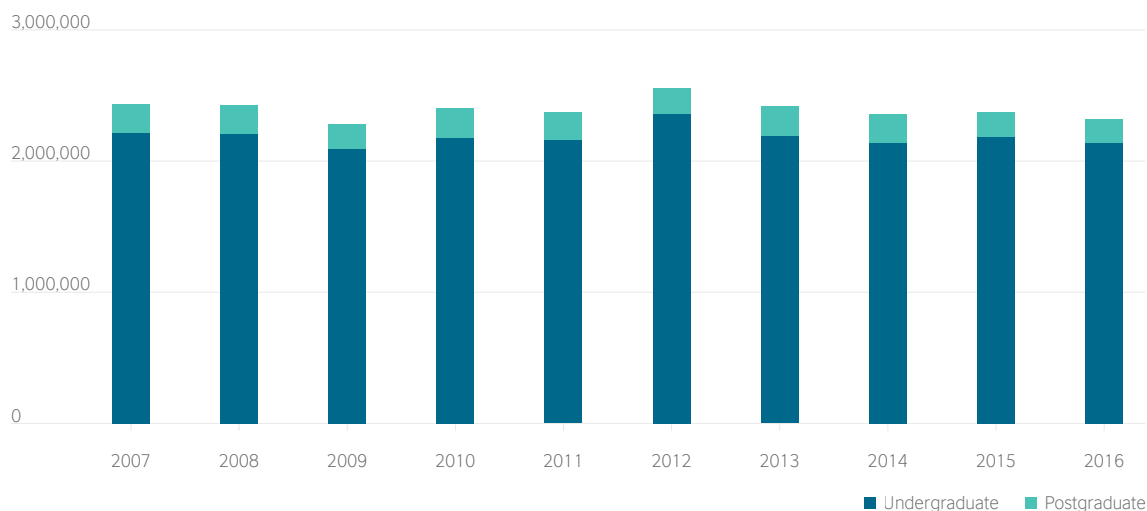
The 59 public universities include 38 Rajabhat Universities, former teacher training colleges that were upgraded to full university status in 2005. Despite their larger numbers, private institutions tend to be much smaller than public universities and accounted for less than 12 per cent of the Higher Education (HE) student population in 2016.

Students can either study for a two-year associate degree or a four-year bachelor's degree. In some cases, students who choose to complete an associate degree can continue to top their qualifications up to a full bachelor's degree.

Public HEIs are generally the country's most prestigious, including all of the eight 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 245th, followed by Mahidol University in 334th place. Both universities are in Bangkok, which accounts for five of the country's eight world-ranked institutions; three other provinces each have one of these top eight institutions.

The entrance procedure for new HE students changed in late 2017, introducing a new unified admissions system (Thai University Central Admission System or TCAS) replacing the previous system of separate applications and admissions tests for each individual university. Under the new system, all admissions tests should be completed after students finish their final year of high school, with the first cohort of students under the new system starting their courses in 2018. Different universities have different academic years – some start in August while others start in June.

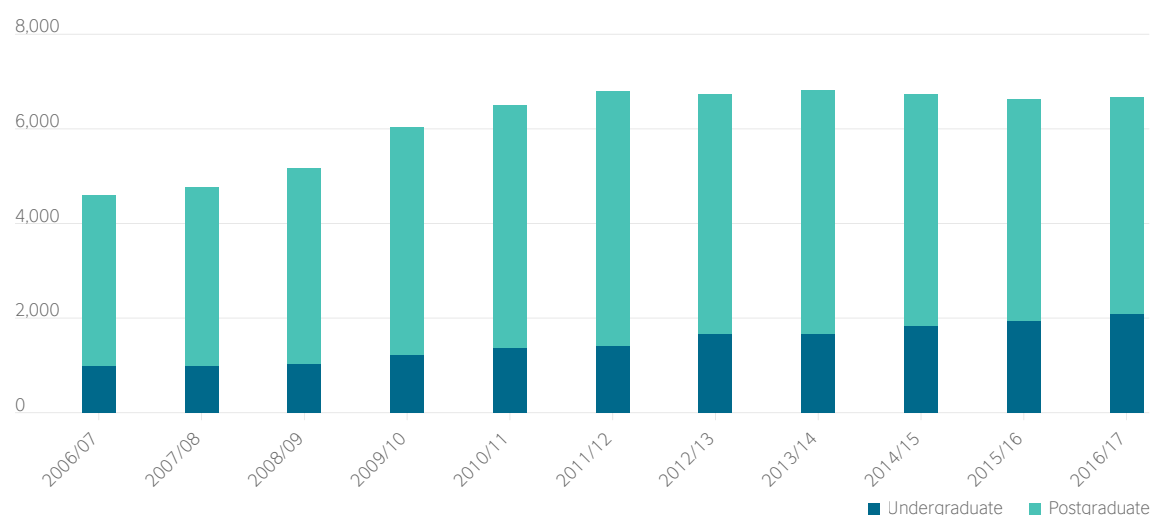
Overall, the country had a total of 2.32 million higher education students in 2016, of whom around 180,000 were postgraduates. This figure has fluctuated over time but is now around 9 per cent below its 2012 peak, reflecting the decline of the student-age population. However, this demographic decline has been offset to an extent by increased interest in higher education, stimulated by improved secondary graduation rates and higher aspirations.

Figure 3.3: Thailand's HE student population over time

Source: National Statistical Office

According to UNESCO estimates, around 30,000 Thai students were studying overseas in 2015-2016. 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, with other major destinations including Australia, Japan and China.

Looking at the UK, there were 6,680 Thai students enrolled in HEI programmes in 2016-2017, a large majority of whom are postgraduates. Thai student enrolments in the UK have fallen slightly over the last three years but are still significantly higher than the number a decade ago.

Figure 3.4: Thai HE enrolments in the UK

Source: HESA Student record 2006/07-2016/17

From a subject perspective, Business and administrative studies is more popular than any other subject for Thais in the UK, accounting for over 40 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 studies, Law, and Creative arts and design.

Thailand is also a regional study destination, attracting around 12,000 students in 2017 according to estimates from UNESCO. Most of these students came from other ASEAN or nearby Asian countries; the largest source country was China, followed by Myanmar, Cambodia, Laos and Vietnam. Thai authorities hope that promoting Thailand as a regional education hub will help to offset falling domestic student numbers due to a decrease in the youth population.

In addition to international mobility, Thailand also hosts an increasing number of transnational education partnerships, mostly in the form of joint or double/triple degree partnerships of which there were 87 active partnerships as of the 2015/16 academic year. In 2016/17 there were a total of 285 students in Thailand registered on programmes with UK universities, excluding distance learning students and students registered with Oxford Brookes University, up by 24 per cent compared to five years earlier. Thailand's TNE environment is discussed in detail in the remainder of this report.

From a policy perspective, Thailand's overall higher education goals are set out in 2017's 20-year Education Strategic Plan, which aims to improve the competitiveness of the country's higher education institutions. Along with targets for the basic education system such as raising average O-Net (standardised examination) scores and increasing the proportion of students choosing vocational education, goals in the higher education sector include increasing the worldwide rankings of top Thai universities, increasing research output, and eliminating "sub-standard" courses at the country's HEIs.

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. Degree programmes are developed by a Thai university and one or more overseas partner universities and may be submitted to the Office of the Higher Education Commission (OHEC) for acknowledgement. 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 published list of programmes, there were a total of eight active joint degree programmes and 79 dual or triple degree programmes at Thai HEIs in the 2015/16 academic year. Data held by the British Council shows that there are currently 22 partnership programmes involving UK universities, 14 of which are included in the aforementioned list. A full list of programmes involving UK universities can be found in Appendix 1.

Thai universities have the power to award their own degrees without needing external approval, and this also applies to joint or dual degrees. However, OHEC reserves the right to “acknowledge” degrees awarded by Thai HEIs. Only acknowledged degrees are recognised by Thai public bodies, including the civil service and the public education system. In practice, universities always submit new degree programmes to OHEC for acknowledgement – this not only gives their students a full range of career opportunities, but also signals the quality of their course. According to a senior government interviewee, a programme without OHEC acknowledgement would find it difficult to recruit students.

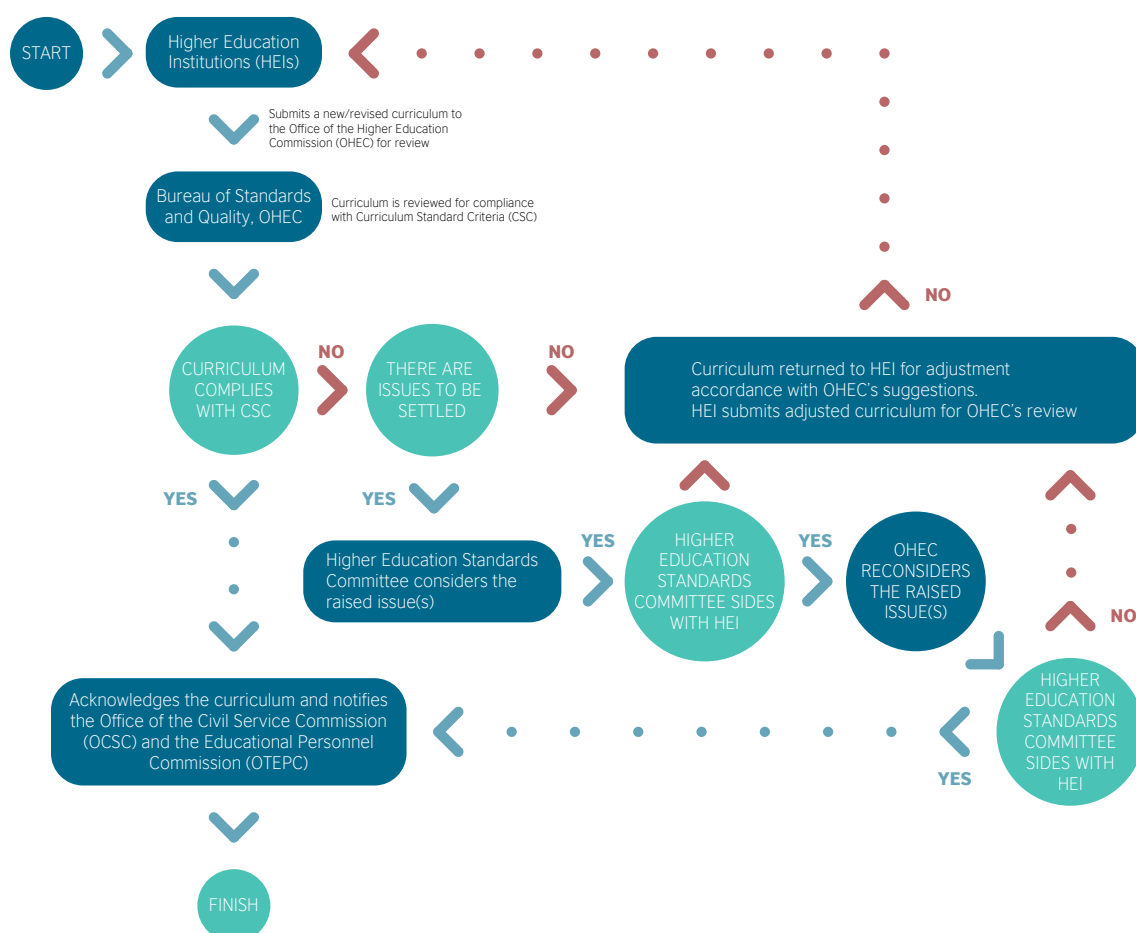
Acknowledgement of a new degree programme is based largely on a curriculum review and will be accepted if it meets OHEC’s Curriculum Standards Criteria, which are published for each subject area. If a programme does not meet these requirements, the institution will have the opportunity to re-submit a revised application.

Other government requirements include informing OHEC of the partnership within 30 days of its approval by the University Council, and assessing the programme every three years to ensure that teaching and curriculum standards are being met. The results of this assessment should be submitted to OHEC, which can withdraw acknowledgement of the course based on these results but cannot directly order it to close.

Beyond this acknowledgement, 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 OHEC. Joint or double degree programmes can be offered at any level, based on any model (e.g. 2+2, 3+1 etc), and can be established in any part of the country. As with programme approval, the OHEC takes a hands-off approach to shutting down existing programmes, with all arrangements to be handled between the university partners.

In addition to OHEC's own acknowledgement, 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 OHEC for the same course.

Figure 4.1: OHEC's degree programme acknowledgement process



Source: OHEC

The delivery model of a dual degree programme varies. 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 a double-degree articulation agreement, 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 performance in the academic course and also 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. 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.

The financial model for a dual degree partnership varies from institution to institution. In some cases, the two universities' finances and teaching are essentially separate – students study for two years in Thailand and pay fees to the Thai partner, followed by two years overseas paying international student fees. In many cases the overseas university offers a discount to students transferring from the 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 or 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 provide payment in kind. For example, a partnership between Chulalongkorn University and Liverpool University waives tuition fees for Thai students going to Liverpool, but the reverse also applies with Chulalongkorn waiving tuition fees for summer courses in Thailand for Liverpool students.

4.1.2 Franchising and validation

Franchised degrees are relatively new to Thailand, with the first partnership launched in 2016 between Regent's International College and the University of London to offer four BSc programmes in the field of Economics, Management, Finance and Social Studies. The Thai partner is a subsidiary of an international schools group and does not have its own degree-awarding powers in Thailand. The College also teaches BTEC HND programmes.

As with joint or dual degrees, there are no restrictions on factors such as tuition fees, and it is possible for universities to operate a franchised degree even if acknowledgement is refused.

Until this year, another partially franchised programme was operated at Assumption University, another private Thai institution. This university offered International Foundation Year and International Year One programme in cooperation with the Northern Consortium (NCUK) of UK universities. Graduates who have completed the International Year One programme can progress to the second year of an undergraduate course at 16 NCUK partner universities in the UK. OHEC acknowledgement is not applicable in this case as the degree the students eventually receive is earned in the UK. From June 2018, NCUK will end their partnership with Assumption University but will start to offer a similar foundation and International Year One programme with the British Council's teaching centre in Thailand.

4.1.3 Articulation and credit transfer

Articulation agreements between overseas and Thai institutions exist but are not especially common or well-known among students. Based on statistics from HESA, around 125 new Thai students joined UK undergraduate degree courses in year 2 or later in the 2016-17 academic year, which represented slightly more than one in six of all incoming Thai first-degree students in the UK that year.

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 agreements most often follow a "2+2" model – students must complete the second year of their course at the Thai university and can then enrol onto year 2 of the UK degree programme.

Differences between an articulation agreement and a double or joint degree programme include programme design (dual degrees are designed cooperatively by the overseas and Thai partners while an articulation student will follow a regular domestic degree programme while in Thailand) and the degree awarded (articulation students will typically only receive a UK degree).

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. In 2016/17, HESA recorded 545 students in Thailand who were enrolled on UK distance learning programmes, almost twice as many as the number of students studying on in-person UK HE programmes in the country. This number has grown by 20 per cent over the last five years and has almost doubled since 2007/08 which is much faster than the overall global growth rate.

Although there are no legal restrictions on 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 from a distance learning qualification cannot be used to apply for a job in the government or public sector. However, distance learning is still popular among students who plan to work in the private sector, as well as expatriates.

4.1.5 Branch campuses

Branch campuses can be broken down into two separate groups: campuses established under rules specifically governing foreign universities setting up branches in Thailand, and universities established by overseas institutions through the normal process for setting up private HEIs.

Although rules 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.

As of May 2018 there were currently two overseas universities involved in setting up branch campuses in Thailand under these new policies: Carnegie Mellon and National Taiwan University (NTU). The structure of these two institutions is different: Carnegie Mellon has set up a postgraduate-focused institute in cooperation with King Mongkut's University of Technology (CMKL University) which is co-located with that university's Ladkrabang campus, while news articles about the NTU approval stated that the university would set up a solely-owned branch campus in the Eastern Economic Corridor.

Meanwhile, Thailand's private higher education rules do not prohibit overseas investors from setting up a private educational institution. Webster University Thailand operates as "an extended international campus of Webster University based in St. Louis, Missouri in the USA" but is officially registered and accredited as a private Thai university.

Approval from OHEC 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 the Minister of Education. There are stronger incentives for a branch campus but also stricter requirements for the subjects that should be taught or the location of the campus, as described in Section 4.2. However, fees are not regulated, although both branch campuses and private HEIs should re-invest at least 70 per cent of any profits into the institution.

4.1.5.1 CMKL University

CMKL University (Carnegie Mellon and King Mongkut's University of Technology's partnership) has separate legal status as a private institution. It was set up over a one-and-a-half year timescale, with the first students to be recruited in 2018. These students will be recruited through Carnegie Mellon's own application system and will start 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, with half the course spent in the US and half in Thailand. Teaching in Thailand will be delivered by a combination of fly-in faculty from CMU and Thai faculty who have received training in Pittsburgh.

Aside from the faculty, Carnegie Mellon also provides a dedicated space for students on the programme at their home campus. Meanwhile, King Mongkut's University of Technology has provided the infrastructure in Thailand as well as paying a set consultancy fee to the US partner.

The initial programmes offered by the new branch campus will be master's degree programmes in electrical and computer engineering and software engineering and a PhD programme in electrical and computer engineering. These subject areas align with the Thailand 4.0 strategy, an essential requirement to be approved as a branch campus. In the future, the goal is for the branch campus to expand into bachelor's degree provision through offering its own degrees rather than those awarded by Carnegie Mellon.

According to an interviewee at KMUT, the use of Article 44 cut through a lot of the bureaucracy and red tape involved in meeting OHEC's rules and requirements, including those for the structure of Thai university programmes. The branch campus also benefits from tax exemptions, both for the university itself and as tax rebates for industrial partners which provide funding for PhD students at the university. This support allows the university to provide tuition-free PhD programmes, although master's degree students will pay fees in line with Carnegie Mellon's own fee structure.

From the Thai partner's perspective, the main advantages to the cooperation include broadening opportunities for students, creating learning opportunities for Thai faculty, and strengthening its reputation and level of recognition.

4.1.5.2 National Taiwan University's branch campus

Since the initial announcement, little information has been released about NTU's branch campus. According to information from Thai officials and local media, the campus will be run without a Thai partner, will be focused on technology-related subjects, and will be located within the Eastern Economic Corridor. However, NTU has not yet announced detailed information about its campus nor its exact location, including the specific programmes to be offered, or the date when it will start to recruit students.

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 Thai higher education and should be taken into account when considering the potential for TNE in Thailand.

Large numbers of these programmes exist, with over 220 programmes at 44 different HEIs listed on the studyinthailand.org website. These HEIs include both public and private institutions, including the leading national universities, but overall international programmes are much more common in the private sector. Some private universities have a strong focus on international programmes and describe themselves as international universities, although this term has no official meaning. In addition to programmes taught entirely in English, universities in Thailand also offer bilingual programmes taught in a mixture of Thai and English.

The acknowledgement procedure for English-medium degrees follows the same requirements as other university programmes. Thai authorities have positive attitudes towards these programmes, not only because they raise the level of internationalisation of students on the course but also because they can help to 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 OHEC acknowledgement is a fairly straightforward process that depends only on the contents of the course. No government approval is needed for 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

Thailand's current education minister, Teerakiat Jareonsettasin, strongly supports branch campuses and has helped to introduce tax incentives for branch campuses setting up in the country's Eastern Economic Corridor, which has resulted in two formal branch campuses being established; the first in the country despite this form of cooperation having been available for more than a decade.

These branch campuses have been approved by orders under Article 44 of the current Thai constitution. This Article, introduced by the country's military government, allows the government to essentially rule by decree, issuing orders "for the sake of the reforms in any field, the promotion of love and harmony amongst the people in the nation, or the prevention, abatement or suppression of any act detrimental to national order or security, royal throne, national economy or public administration". This has greatly simplified the previous bureaucratic procedure for establishing an international branch campus in Thailand.

Applications to establish branch campuses under Article 44 are approved by a special committee headed by the Minister of Education. As described in Section 4.2.4, local media have recently reported that the Thai government intends to separate OHEC from the Ministry of Education and merge it with the Ministry of Science and Technology. If this happens, the committee would likely be headed by the Minister of Research and Higher Education.

These approvals are issued on a case-by-case basis, and discussions with relevant authorities and requirements set by the Board of Investment (see Appendix 2) 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 OHEC this will mainly depend on the university’s position in international rankings such as those in published by QS or Times Higher Education.

However, the interviewee reported that 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 about both the overall and subject-specific ranking of the home institution.

- Subject areas taught in 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 competing 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.

An interviewee from Thailand’s Board of Investment stated that the EEC is still the preferred location for branch campuses. Campuses which are not located in the EEC are still preferred to have some involvement with this region; for example the PhD programme offered by the Carnegie Mellon / King Mongkut

cooperation involves placements at companies in the EEC.

The application form for establishing a branch campus provides two options: an independently-operated branch campus and 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 two branch campuses approved so far include one institution of each kind: Carnegie Mellon University is working with King Mongkut's University of Technology to establish a branch based at KMUT's Ladkrabang campus, but National Taiwan University does not have a local partner.

The application form for new branch campuses can be found on OHEC's website . This form is quite straightforward, with key required information including the details of the overseas HEI (including the courses it currently provides, numbers of students and graduates and position in international rankings), as well as information on the location of the proposed branch campus, any Thai partner institution, the branch campus's president, administration structure and educational approach, and details of the course(s) to be offered.

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 a Thai partner.

According to an official from the Board of Investment the minimum level of investment is one million Baht. This is unlikely to be a problem to a potential branch campus as it is equivalent to around £23,000, likely lower than the amount of working capital needed by a branch campus in practice.

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, and at least one overseas university (Webster University Thailand) has been established under this law. Applications for new domestic private universities are assessed and approved by the OHEC

4.2.2 Incentives available to branch campuses

There are no published documents officially setting out the incentives for branch campuses in Thailand. According to an interviewee from OHEC, these must be discussed on a case-by-case basis with the special committee approving the new branch campus.

However, the interviewee said that the treatment of a branch campus would not be worse than the incentives available to domestic private universities established under the Private HEI Law of 2003. Compared to normal businesses in Thailand, these HEIs benefit from several tax exemptions:

- 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 OHEC insists on prospective private universities holding 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 was 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. According to research published in 2010, it was common for medium-sized or larger private HEIs to apply for government-subsidised loans for faculty development, infrastructure and 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 part of fees for students studying at a branch campus.

Less directly, tax incentives are also available to local companies supporting higher education, such as 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 unspecified other 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 provisions for tax on 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 the 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 re-invest 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 the OHEC.

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 OHEC.

4.2.4 Potential risks and challenges

The most significant risk to a branch campus in Thailand is changes to the country's higher education policy. In May 2018, local media reported that the Thai government aims to separate higher education from the Ministry of Education and instead merge it into a new Ministry of Research and Higher Education. The current Minister of Education, Teerakiat Jareonsettasin, has been a strong supporter of introducing overseas branch campuses to Thailand and a new Minister may have less enthusiasm in this field.

Policy may also change after Thailand's current rulers hand over power to an elected government. The current promised date for elections is early 2019, but these have repeatedly been postponed over the last few years.

Even if Thai education policy changes, this will probably not mean that existing branch campuses will not be able to operate. Rulings made under Article 44 have the force of law and cannot easily be repealed. However, it does mean that future branch campuses might have a tougher time winning government approval – especially because many local Thai universities see this as a threat to their own student recruitment, which is already facing challenges due to the falling youth population.

In contrast to branch campuses, joint and dual degree programmes at Thai universities are not a contentious political issue. Universities support these programmes as they do not see them as competing directly with their own programmes; instead they help to keep students, who would otherwise go overseas, in Thailand for at least part of their course. The partnerships also help to support Thai universities' internationalisation and raise their competitiveness. Government policy on joint and dual degree programmes is therefore not likely to change significantly over the next few years.

Outside of government policy, one significant challenge facing Thailand's higher education sector is the country's falling youth population. As discussed in Section 3, the number of 15 to 24-year-olds in the country is expected to fall by 14 per cent in the decade following 2017, having already fallen by 20 per cent since its peak in the 1990s. This means that there will be increasingly intense competition for students as universities look to fill places.

One way that universities are trying to maintain student numbers is by increasing international enrolments and offering English-medium programmes. These will compete more directly with branch campuses and other transnational education compared to Thai-language programmes.

Overseas universities may also step up their efforts to recruit from a shrinking pool of Thai students, meaning that TNE will be increasingly squeezed between the two alternatives. The rising number of students heading to lower-cost regional education destinations such as China may also compete with TNE as cost is an important factor for this decision, as discussed in Section 5.

More broadly, the low awareness of transnational education in Thailand is an important challenge for branch campuses and joint programmes. Agents and universities agree that many Thai students are unfamiliar with these options and this affects the potential level of demand.

5. Thailand's TNE market

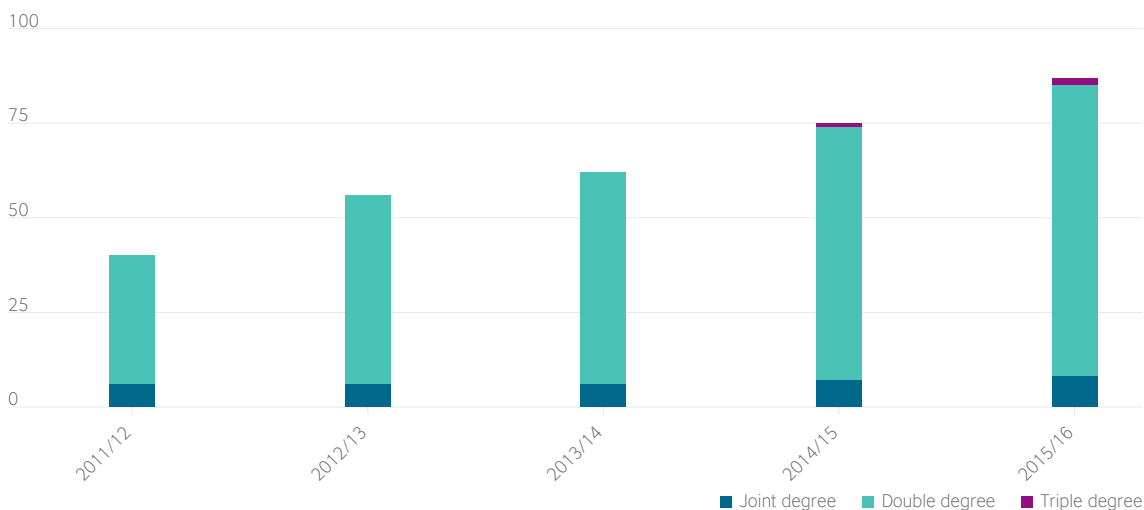
5.1 TNE market scale and development

In terms of the number of programmes, the dominant form of transnational education in Thailand consists of joint and double/triple degree partnerships. According to the most recent data published by the Office of Higher Education Commission, covering the period from August 2015 to July 2016, there were a total of 135 collaborative programmes between Thai and overseas HEIs in that academic year, including a total of 87 joint and double / triple degree partnerships .

Among these programme formats, dual degrees are the most common by far, accounting for 77 programmes or nearly 90 per cent of the total. There were eight joint degrees and two triple degree programmes.

The number of partnerships has rapidly grown over time. According to OHEC's data, the number of dual degree programmes rose every year from 2011-12 to 2015-16, more than doubling over that time period. Meanwhile, the number of joint degrees has held stable, with six programmes in 2011-12 increasing to eight as of 2015-16. Data specifically covering triple degree partnerships was not available before 2014, when there was one such cooperation.

Figure 5.1: Growth in different partnership types over time

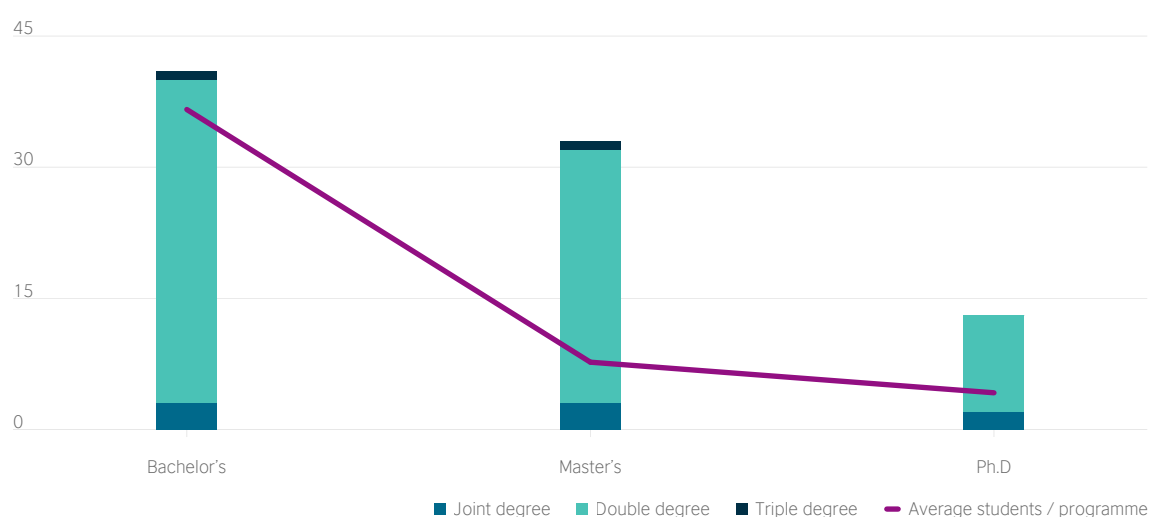


Source: OHEC

Bachelor's degrees accounted for more partnerships than any other level of study but fell short of an overall majority. In total there were 37 dual degree partnerships at this level, along with three joint and one triple degree. Meanwhile, there were a total of 33 master's degree partnerships (29 dual degrees, three joint degrees and one triple degree), and 13 at the PhD level (11 dual and 2 joint degree programmes).

However, in terms of student numbers, bachelor's degrees dominate the total. Excluding the 17 programmes for which figures are not available, the average joint / dual / triple degree programme at the bachelor's degree level had 36.6 students, while master's degree partnerships had an average of 7.7 students and each doctoral partnership only had 4.2 students on average.

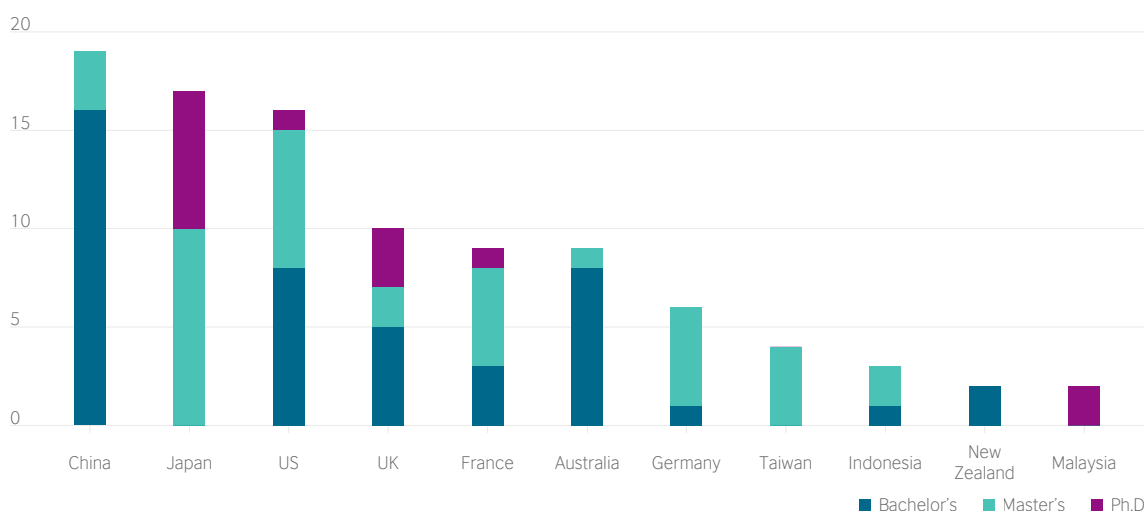
Figure 5.2: Partnership types by level of study



Source: OHEC

Looking only at dual, joint and triple degree partnerships, the UK is the fourth most popular partner country, with its universities involved in 10 different dual / triple or joint degree partnerships listed in the OHEC data (11 per cent of the total). This is behind China, Japan and the US, but ahead of France and 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/triple degree partnerships are at the bachelor's degree level, while all partnerships with Japan are postgraduate programmes.

OHEC also provides information on single-degree partnerships, listing 51 such partnerships, although this data is less complete as OHEC's acknowledgement is not required for this kind of partnership and records are based on a survey of Thai HEIs. The number of single-degree partnerships listed in OHEC's report fell sharply in 2015, down by 31 per cent compared to the 74 programmes recorded in 2014, but it is not clear whether this represents a real drop in the number of partnerships of this kind.

Figure 5.3: Leading partner countries by level of study

Source: OHEC

Note: Only countries with two or more joint/dual/triple degree partnerships are shown. Some partnerships include more than one partner from different countries and are included under both countries.

Analysis of the subjects offered in joint and dual / triple degree programmes shows that around half of partnerships are in the science or engineering field, followed by around 20 per cent in business-related fields, 13 per cent in languages and literature, and smaller numbers in education, medicine, fine arts, social sciences and law.

The bulk of the language programmes are bachelor's degree programmes in Chinese, offered in cooperation with universities in mainland China; these account for the majority of Chinese universities' TNE in Thailand. Among universities from English-speaking countries (including the UK), most of the partnerships are in the science and engineering field, followed by business programmes. The US has a similar breakdown, but Japan's partnerships are almost all in science and engineering.

Public universities make up the overwhelming majority of Thai partner institutions for double and triple degree partnerships. Only seven such programmes exist at private institutions, with a further five at Rajabhat universities and two at Rajamangala Universities of Technology. Private universities do seem more likely to offer joint degrees, but it is not clear if this is a true trend or just a random effect due to the small number of these partnerships.

5.2 Tuition fees

Domestic tuition fees in Thailand vary depending on the type of university, type of programme and subject 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, with private university fees starting from 70,000 Baht (£1,600) per year but in some cases being significantly higher.

Meanwhile, fees for joint or dual degree TNE programmes can be substantially more expensive, usually above 100,000 Baht per year (£2,300) for Thai citizens and again significantly higher in some cases. These programmes, as well as English-medium “international programmes” offered by the Thai institution, do not have a major gap between fees at public and private universities. Most or all of these programmes recruit international as well as Thai students, generally charging higher fees for international students even at private institutions.

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. Analysing fees at three of the country’s large public universities – Chulalongkorn University, Thammasat University and King Mongkut’s University of Technology Thonburi – shows that undergraduate tuition fees for domestic students range from around 156,000 to 306,000 Baht for a four-year degree programme, depending on subject and institution, which is equivalent to around £900 to £1,800 per year. Meanwhile, fees for master’s degree programmes range from around £1,200 to £3,100 per year, again varying 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	43,250 to 47,250 THB per year (£1,000 to £1,100)
	Master’s degree	61,750 to 69,750 THB per year (£1,400 to £1,600)
King Mongkut’s University of Technology Thonburi	Undergraduate degree	40,375 to 76,500 THB per year (£900 to £1,800)
	Master’s degree	51,000 to 132,500 THB per year (£1,200 to £3,100)
Thammasat University	Undergraduate degree	39,000 to 66,900 THB per year (£900 to £1,500)

Sources: Chulalongkorn University, KMUT Thonburi, Thammasat University

5.2.2 Private universities

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 and also depend on the subject being offered. 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	105,134 to 155,521 THB per year (£2,400 to £3,600)
Bangkok University	Undergraduate degree	74,070 to 99,245 THB per year (£1,700 to £2,300)
Rangsit University	Undergraduate degree (except medical-related courses)	69,250 to 130,250 THB per year (£1,600 to £3,000)
	Undergraduate degree (medicine)	666,000 THB per year (£12,700)

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	209,250 THB (£4,800) per year
King Mongkut’s University of Technology Thonburi (Public)	Undergraduate international programmes	85,200 to 125,000 THB per year (£2,000 to £2,900)
Rangsit University (Private)	Undergraduate international programmes	118,900 THB per year (£2,700)
University of the Thai Chamber of Commerce (Private)	Undergraduate international programmes	110,713 THB per year (£2,600)

Sources: Chulalongkorn Univ, KMUT Thonburi, Rangsit Univ, Univ of the Thai Chamber of Commerce

5.2.4 Joint and dual degree programmes

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

In some cases, such as the Mahidol / Sussex partnership listed below, the dual degree programme is actually an outgrowth of the university's international programme. Students have the choice to either go overseas in the second year and earn degrees from both institutions, or to continue in Thailand to earn the local degree.

In comparison, 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 higher fees than 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	200,000 Baht (£4,600) per year at Thammasat 25% discount on Nottingham's fees for UK part of course
Mahidol University & University of Sussex (UK)	4-year (2+2) undergraduate programmes in Biomedical Science and Bioinnovation	200,000 Baht (£4,600) per year at Mahidol Standard overseas student fees in the 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 (£2,400) per year at Prince of Songkla Fee policy in the UK / Malaysia is unclear
Slipakorn University & Birmingham City University (UK)	4-year (4+0) undergraduate programme in Business Administration, delivered by both Thai and UK instructors	308,800 Baht (£7,100) 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	Standard overseas fees in the UK "Approximately 400,000 baht" (£9,200) per year at SWU
Assumption University & University of the West of England, Bristol (UK)	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)	600,000 baht (£13,900) in total
Assumption University & City University of Seattle (USA)	2.5 year MBA (1 st semester at AU, 2 nd -semesters at CityU)	1.34 Mn Baht (£31,000) in total

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

5.2.5 Branch campuses

CMKL University (Carnegie Mellon's cooperation with King Mongkut's Institute of Technology Ladkrabang) has announced that it will not charge tuition fees to its PhD students, as this will be included in the student support package. However, master's degree students will be eligible for fees.

The example of Webster University Thailand may also be relevant, as it positions itself as an international branch campus despite having the legal status of a private domestic university. The university charges tuition fees of 210,000 Baht per semester or 420,000 Baht (£9,700) per year for undergraduate programmes, as well as additional compulsory fees which add up to around £1,000 per year. This is substantially higher than most undergraduate joint degrees or international programmes in the country.

At the postgraduate level the total cost of a programme ranges from 551,700 to 827,550 Baht (£12,800 to £19,100). These programmes would typically last for one to two years depending on the number of credits a student studies per semester.

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 both existing and new transnational education cooperation. Interviewees at all universities expressed positive attitudes towards TNE, seeing joint and dual degree programmes as a benefit for both students and the university itself, and 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, as well as giving them an international environment and helping to expand their horizons. Most of the university interviewees commented that a major advantage of the programme was that students could receive international experience and an overseas degree without needing to spend the whole course abroad, meaning both lower prices and more flexibility.

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 believed that joint and dual degrees do not compete directly with domestic programmes but are instead seen as 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 for part of their course.

One interviewee elaborated that the higher price of their TNE programme (both domestically and in the overseas leg of the course) means that it "caters to a certain type of student who has already had international experience and has a wealthier background", and who would have been unlikely to choose 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.

However, one interviewee conceded that not everyone in the university saw the programme the same way, and that some of their institution's senior management felt that the courses were competing with domestic programmes. An agent also commented that although TNE programmes were usually considered as alternatives to overseas study, the fact that they are more affordable than a full overseas degree programme could mean that some of the students choosing this option would otherwise have only been able to study on a domestic course.

Aside from keeping 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 to build 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 can 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, who asked not to be identified, 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 set up 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. Compatibility of curriculum, similar departments and sizes, and potential 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 though this was in a completely different field.

Meanwhile, the 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. This benefits students as well as supports the Thai institution's 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 for working 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.

The reason for this may be because of different attitudes towards branch campuses as potential competitors for Thai universities. Although joint and dual degree programmes are seen as competing mainly with overseas study rather than domestic degree courses, the same is not true of branch campuses. An official at the OHEC confirmed that many domestic universities were afraid of losing students to branch campuses and saw them as a threat.

5.4 Thai student attitudes towards TNE

The main barrier for TNE programmes in Thailand to attract students is a low level of awareness of these programmes. Universities and agents generally agreed that many Thai students were not aware of transnational education options, and even those who were aware of the concept had little understanding of what it would involve and needed a lot of explanation to understand whether this option would be suitable for them. Common questions centred around the cost of the course as well as living expenses overseas.

An interviewee at one Thai university commented that there was “no awareness” even among students who were interested in overseas study or scholarship opportunities; these students are both “surprised and pleased” when they ask for information and discover about the university’s TNE partnerships.

The lack of existing branch campuses means that there is currently even less awareness of this form of TNE.

All interviewees reported a trend of increasing awareness of TNE over the last few years. One agent who had long experience in the sector commented that TNE was “now coming back”, having previously been a topic of interest around 10 years ago; the agent also commented that the environment is now somewhat different from that time as TNE now focuses on officially-acknowledged partnerships rather than unofficial exchange programmes. Universities are also more open to guiding students through the different options available to them. The growing number of international schools in Thailand is also helping to raise awareness of TNE programmes, as well as boosting overseas study more generally.

Among Thai students who do consider TNE programmes, the main advantage they see in these programmes is the opportunity to earn an overseas degree while staying in Thailand for part of the course. Students largely see a joint or dual degree 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 higher-quality education, prestige of the overseas degree leading to better employability, and opportunities to develop international experience. Agents commented that employability and overseas experience are becoming increasingly important in this decision, and students and their parents would find programmes including industry or internship experience in the UK particularly attractive.

According to these university and agent interviewees, the ranking of the overseas partner would be seen as very important when considering whether to take up a TNE opportunity, both overall and within the relevant subject area. One agent commented that the overseas partner’s ranking would be a more important factor than the Thai university here, as it would mainly be the UK degree that would open doors for the student after they graduate.

Interviewees also commented that students are often strongly influenced by recommendations from their friends as well as lecturers. On the other hand, one negative factor mentioned by an interviewee at one of the country’s major education agencies is that many students are reluctant to leave their friends after studying together in Thailand. As a result, the agent believes that students have more interest in 3+1 programmes and partnerships at the master’s degree level as opposed to the 2+2 undergraduate format. Flexibility is also an important factor for some students when they are considering applying to a degree programme.

Financial aspects are also important to Thai students considering TNE opportunities. Interviewees mainly spoke in the language of scholarships and discounts, as opposed to directly looking for a lower total price. Many current TNE partnerships offer students a tuition fee discount on the overseas element of their course to help to attract students to the programme.

After graduation, an employer reported that TNE graduates are well respected in Thailand because of the combination of skills as well as local and international perspective developed as part of their studies.

It is harder to make firm statements about the attractiveness of branch campuses, given that this is a new sector in Thailand. One agent commented that Thai students would likely prefer a joint degree programme from a university in Thailand, and pointed out that most students at Webster University Thailand (which the agent saw as a branch campus) were international rather than Thai.

Another agent also felt that branch campuses might be a tough sell, at least initially. This agent stressed that a branch campus must convince students and their parents that it could offer the same quality education as the home campus overseas, and that it would take time to build the reputation and trust of a branch campus. Disadvantages pointed out by the agent included the lack of an overseas experience and the lack of a “native speaker environment” to develop the students’ English skills.

The above comment is also notable for the assumption that a branch campus would be competing with overseas study and not domestic Thai universities, as for existing TNE partnerships. UK universities should bear in mind that this will likely be the reference frame of many Thai students and their parents.

Another positive finding from the interviews is that agents agreed that Thai students would be happy to travel to another part of the country for a strong university programme, and would not insist in staying close to home or going to Bangkok.

Agents and universities also saw some potential for overseas students at branch campuses and other TNE programmes in Thailand. As discussed in the previous section, some universities see attracting international students as one of the advantages of offering a TNE programme, while agents also feel that this could be an attractive market. An interviewee at King Mongkut’s University of Technology told us that applicants to CMKL University (their branch campus partnership with Carnegie Mellon University) included students from elsewhere in East Asia and in the Middle East alongside Thai citizens. In general, the main international markets for TNE in Thailand are perceived to be nearby countries, including Indonesia, Vietnam and Cambodia.

In general, the most attractive subjects for Thai students considering overseas or TNE study are in the business field, although some interviewees also saw science and engineering programmes as increasingly attractive. However, based on the British Council’s understanding of rules for branch campus approval, only subjects aligning with the Thailand 4.0 strategy would be allowed at these campuses, which do not include business. Joint or dual degree programme options are more flexible, allowing partnerships in any area.

6. Conclusions and potential for future cooperation

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 6,800 Thai students studying in the UK in 2016-17. Thailand's economy is growing over time, albeit not as quickly as in some other nearby countries, increasing the number of Thais who can afford to study abroad. 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 325 students were registered on UK degree programmes in Thailand as of the 2016/17 academic year.

The main current model for transnational education in Thailand consists of dual and joint degree programmes, offered in cooperation between Thai and overseas universities. Partnerships based on these models have seen significant growth in recent years. Undergraduate partnerships are generally organised on a 2+2 basis and students generally see them as a cheaper and more flexible alternative to studying a full degree abroad.

Both public and private Thai universities appear to have an appetite for more cooperation along these lines and there is also increasing awareness among students – although in absolute terms this awareness is still quite low. Regulatory requirements are straightforward and not seen as a major issue by universities, consisting mainly of making sure that the curriculum plan meets the same Thai government requirements as a domestic degree in the same subject. There are no set rules for the overseas partner's involvement in the part of the course taught in Thailand, and partnership models vary greatly in this respect.

Given this interest and growing awareness, there may be room for more joint and dual degree partnerships between UK and Thai universities. Beyond academic strength and reputation (both overall and 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 as preferring partners who can give articulating students a discount on the full tuition fee for the programme.

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 of 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. New branch campuses can now be approved through a much simpler procedure which has already resulted in two campus approvals: one joint institute operated by Carnegie Mellon University and King Mongkut's University of Technology, and an approved branch campus of National Taiwan University that does not have a Thai partner.

The approval process for branch campuses involves submitting a relatively straightforward application form, with decisions being made by a special committee headed by the Minister of Education. One important driving factor is the current Minister's strong support for overseas branch campuses. However, this also presents risks as local media have reported that higher education will be separated from the Ministry of Education and merged into a new Ministry of Research and Higher Education, whose Minister may not have the same enthusiasm. It is unlikely that an already-approved campus would have its approval cancelled, but it is possible that the process could become more difficult to navigate.

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 environment for approved 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, a branch campus 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.

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.

One very important restriction is that branch campuses established through the new procedure may only offer subjects that serve the priority industries set out in the Thailand 4.0 economic strategy. Branch campuses are not allowed to offer other subjects as this would compete with domestic Thai universities. Thailand 4.0 industries are mainly in the fields of engineering, technology, medicine and biotechnology, and one notable field where branch campuses cannot offer courses is business administration. This may make the opportunity less attractive as it is the most popular subject for Thais in the UK by a large margin.

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.

In contrast to joint and dual degree cooperation, interviewed Thai university representatives expressed less interest in working together with UK universities on a full branch campus, perhaps because these are seen as potential competitors for local students (as opposed to joint programmes which are usually seen as attracting students who would otherwise study abroad for the whole course). Another negative factor is that Thailand's current lack of branch campuses means that there is little student awareness of this mode of study.

Thailand's attractiveness as a TNE host country is also affected 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. The attractiveness of the opportunity therefore depends mainly on a campus or partnership's ability to recruit local students.

In summary, simplifications to the process of establishing a branch campus in Thailand make this much easier than it was before 2017, but subject restrictions and low student awareness mean 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.

Appendix 1: UK-Thailand collaborative degree programmes acknowledged by OHEC

According to OHEC's most recently published list of collaborative degree programmes between Thai and foreign HEIs, there were a total of 135 collaborative programmes between Thai and overseas HEIs in the 2015 academic year including a total of 87 joint and double / triple degree partnerships.

Among these partnerships, one joint degree, nine dual / triple degrees and five single-degree partnerships involved UK partner universities, as listed below:

Thai partner	Overseas partner(s)	Degree awarded	Notes
Chulalongkorn University	University of Liverpool, UK	Joint PhD (Biomedical Sciences & Biotechnology)	6+ months in Thailand 6+ months at partner university Students have a supervisor at each university.
Assumption University	University of the West of England, UK Anglia Ruskin University, UK University of Brighton, UK University of Applied Sciences, Mainz, Germany Université Toulouse I Capitole, France César Ritz Colleges, Switzerland City University of Seattle, USA Yunnan University of Finance and Economics, China Australian Catholic University, Australia La Trobe University, Australia	Dual/triple MBA degree	4 months - 1 year in Thailand 4 months - 1 year at partner university
Mahidol University	University of Sussex, UK	Dual bachelor's degree (Biomedical Science)	2 years in Thailand 2 years at partner university
Mahidol University	University College London, UK	Dual master's degree (Computer Science)	1 year in Thailand 1 year at partner university
Mahidol University	Liverpool John Moores University, UK	Dual PhD (Sports Science)	1.5 years in Thailand 1.5+ years at partner university
Prince of Songkla University	University of Nottingham Malaysia Campus Middlesex University, UK	Dual bachelor's degree (Business Administration)	2 years in Thailand 2 years at partner university
Silpakorn University	ESC Rennes School of Business, France Kingston University, UK	Dual bachelor's degree (Event & Leisure Marketing)	3 years in Thailand 1 year at partner university
Silpakorn University	Birmingham City University, UK	Dual bachelor's degree (Digital Communication Design)	4 years in Thailand. In the final year, students are taught by visiting UK professors.

Thai partner	Overseas partner(s)	Degree awarded	Notes
Srinakharinwirot University	University of Nottingham, UK	UK bachelor's degree (Medical Sciences); Thai MD degree	3-year UK bachelor's degree Additional 3 years in Thailand
Thammasat University	University of Nottingham, UK University of New South Wales, Australia	Dual bachelor's degree (Engineering)	2 years in Thailand 2 years at partner university
Kasetsart University	University of Reading, UK	Thai bachelor's degree (Biotechnology)	3 years in Thailand 1 year at partner university
Kasetsart University	University of California, Davis, USA University of Reading, UK	Thai bachelor's degree (Food Science & Technology)	3 years in Thailand 1 year at partner university
Mahanakorn University of Technology	University of Sheffield, UK	UK bachelor's degree (Chemical Engineering)	2 years in Thailand 2 years at partner university
Mahanakorn University of Technology	University of Sheffield, UK	UK bachelor's degree (Civil Engineering)	2 years in Thailand 2 years at partner university
Mahanakorn University of Technology	University of Sheffield, UK University of Ulsan, South Korea	UK bachelor's degree (Electronic, Electrical & Computer Engineering)	2 years in Thailand 2 years at partner university
Mahanakorn University of Technology	University of Sheffield, UK Oxford Brookes University, UK University of Ulsan, South Korea	UK bachelor's degree (Mechanical & Automotive Engineering)	2 years in Thailand 2 years at partner university

Source: Office of the Higher Education Commission

As described in Section 5.1, it is likely that not all single-degree partnerships are included in OHEC's data, as these partnerships do not require OHEC acknowledgement and were instead compiled on a survey basis.

Appendix 2: Criteria and conditions for branch campuses in Thailand (unofficial translation)

Criteria, types, methods and conditions for high-potential foreign higher education institutions that come to provide education in Thailand

1. High-potential foreign higher education institutions that come to provide education in Thailand
 - 1.1 Must be acknowledged in certain subject areas in the rankings done by Quacquarelli Symonds (QS), Times Higher Education (THE) or other institutions that the High-Potential Foreign 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. High-potential foreign 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 of those offered in their main campus in terms of the curriculum, subjects as well as academics.
3. High-potential foreign higher education institutions that wish to provide education in a higher education level in Thailand must submit an application form together with relevant documents to the Sub Committee, asking permission to set up in Thailand. The application form is provided by the Office of the Higher Education Commission.
4. High-potential foreign 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 high-potential foreign 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 high-potential foreign higher education institutions

Conditions

1. The institution must be a high-potential higher education institution. In case this is a foreign investment, the High-Potential Foreign Higher Education Institutions Education Development Committee must approve.
2. The institution must locate in the Eastern Economic Corridor zone or other special economic zones that the cabinet has announced as areas for high-potential foreign higher education institutions or other areas as approved by the Committee.
3. The institution must follow the rules, methods and conditions that the Committee has approved.

Rights and benefits

1. Exempt from corporate income tax for 8 years without the limit of amount of exemption
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 a high-potential higher education institution 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

