QAA

COUNTRY REPORT:

Thailand

Contents

Introduction

This report is part of a series of country reports that QAA regularly produces to offer higher education providers an insight into the higher education and regulatory landscape of key countries for UK transnational education (TNE). The reports offer high level information and intelligence about regulations, challenges and opportunities, signposting to sources of further information.

In producing these reports, QAA seeks to liaise with local regulators and quality assurance agencies, and other UK-sector bodies with relevant expertise. QAA has a number of strategic partnerships with counterpart agencies in key countries for UK TNE. These are a source of intelligence and direct access to up-to-date information about local regulatory developments.

We would like to thank the British Council Thailand for their valuable support in developing this report, and the Office of the Higher Education Commission for offering comments to the report.

The Kingdom of Thailand

The Kingdom of Thailand (Thailand) is located at the centre of the Southeast Asian Indochinese Peninsula covering a geographical area of 513,000 square kilometres. With a population of 69.2 million, it is the world's 21st most populous country, and the fourth most populous nation in ASEAN (Association of Southeast Asian Nations) after Indonesia, the Philippines and Vietnam.

Rates of population growth, currently at 0.2% per year, have been declining year-on-year, and total population is expected to start decreasing in 2020 to 65 million by 2050. In fact, Thailand is one of the world's fastest ageing societies.[1] The proportion of Thai people above the age of 65 has increased from 5% in 1995 to 11.8% in 2018, and is projected to reach more than a quarter of the population by 2050, with the working age population consequently expected to drop by 11%. Of the Lower Mekong Countries - which include Vietnam, Laos, Cambodia and Myanmar - Thailand is the country with the lowest percentage of its population under 19 years of age, at 23.6%.[2]

The capital and largest city is Bangkok, a special administrative area. Thailand is divided into 77 provinces which are administrated at regional level by the four regions of Northern Thailand, Northeastern Thailand, Central Thailand and Southern Thailand. Each region has its own different historical background, culture, language and people. The official language is Thai, with English, and ethnic and regional dialects also widely spoken. There is no official state religion in Thailand, although over 90% of the population follows Buddhism.[3]

Over the last four decades, Thailand has witnessed significant social and economic development, moving from a low-income country to an upper income country. Thailand's Gross Domestic Product (GDP) is estimated by the World Bank at 455 billion US Dollars (USD), with an average growth of 3.5 over 2005-15. After a dip in 2014-16, economic growth reached 4.8% in the first quarter of 2018,[4] driven by recovering exports, improving farm and tourism sectors, continued government spending, and rising private consumption. In 2016, per-capita GDP was around US$5,900, much higher than its neighbouring countries Cambodia, Laos and Myanmar, as well as most fellow ASEAN members including Vietnam and Indonesia, although somewhat lower than neighbouring Malaysia and China.

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[1] www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2015_Report.pdf (PDF 5.3MB)
[2] www.populationof.net/thailand/
[3] http://web.nso.go.th/en/survey/popchan/data/2015-2016-Statistical%20tables%20PDF.pdf (PDF 827KB)
[4] www.worldbank.org/en/country/thailand/overview

Thailand is now ranked 83rd in the United Nations Human Development Index as a country with High Human Development,[5] with an adult literacy rate of 93%, a tertiary gross enrolment ration of 46%, and 4.1% of national GDP spend in education.[6]

To support the further development of the country from a production-based to a service-based economy, the government is implementing a series of measures to promote creativity and innovation across different key industries.

Key national policy drivers

Thailand has laid out its long-term reform plans for attaining developed country status in its 20-Year National Strategy (2018-2037).[7] The reforms address six key strategic priorities: ensuring national security, strengthening national competitiveness, empowering and developing human capital, improving social equality and equity, developing towards a green economy and society, modernising public administration. Specific goals for the 20-year national strategy include:

- achieving an economic growth rate of 5% per year
- achieving growth in agriculture of 3% per year, manufacturing 4.5% per year and service 6% per year
- increase the average income of 40% of poorest population by at least 5% per year
- raise elementary schools enrolment rate to above 90%
- raise literacy rate above 85%
- increasing the national Programme for International Student Assessment (PISA) score.

To support the implementation of the 20-Year National Strategy, the Thai government has further developed the Thailand 4.0 policy for sustainable growth.[8] Thailand 4.0 aims specifically to support the development of the country from an economy previously reliant on agriculture (Thailand 1.0), light industry (Thailand 2.0), and heavy industry (Thailand 3.0) into an innovation-driven economy by 2036. The policy sets four overarching key objectives associated with more specific goals:

1   **Economic Prosperity**: To create a value-based economy that is driven by innovation, technology and creativity. Specific goals include increasing Research and Development expenditure to 4% of GDP; increasing economic growth rate to full capacity rate of 5 to 6% within five years; and increasing national income per capita from 5,470 USD in 2014 to 15,000 USD by 2032.

2   **Social Wellbeing**: To create a society that moves forward without leaving anyone behind (inclusive society) through realisation of the full potential of all members of society. Specific goals include reducing social disparity in 2032; transforming to a social welfare system within 20 years; and developing at least 20,000 households into 'Smart Farmers' within five years.

3   **Raising Human Values**: To transform Thai citizens into 'competent human beings in the 21st century'. Specific goals include raising Thailand Human Development index to the top 50 countries within 10 years; ensuring that at least five Thai

[5] hdr.undp.org/sites/default/files/2018_summary_human_development_statistical_update_en.pdf (PDF 500KB)
[6] hdr.undp.org/en/countries/profiles/THA
[7] www.bic.moe.go.th/images/stories/pdf/National_Strategy_Summary.pdf (PDF 916KB)
[8] http://thaiembdc.org/thailand-4-0-2

universities are ranked amongst the world's top 100 higher education institution within 20 years.

4   **Environmental Protection**: To become a liveable society that possesses an economic system capable of adjusting to climate change and low carbon society. Specific goals include developing at least 10 cities into the world's most liveable cities and reducing terrorism risk.[9]

Thailand 4.0 identifies 10 priority strategic industries: five to develop over the short to medium term); and the other five for longer-term development (see Table 1).

The Fund for Enhancement of Competitiveness for Targeted Industries (£230 billion) has been appositely established for investment in research, innovation and the development of expertise in the 10 strategic industries. In addition, as part of Thailand 4.0, the government is also developing new growth hubs, starting with the Eastern Economic Corridor (EEC). The EEC covers Rayong, Chonburi, and Chachoengsao provinces, and is intended as a pilot development zone to attract foreign investors facilitating tax and regulatory requirements, focusing on the 10 identified key industries.

Table 1: Thailand 4.0: 10 Future Industries

Short and medium-term priority industries	Long-term priority industries
• Next-Generation Automotive	• Robotics
• Smart Electronics	• Aviation and Logistics
• Affluent, Medical and Wellness Tourism	• Biofuels and Biochemicals
• Agriculture and Biotechnology	• Medical Hub
• Food for the Future	• Digital Technology

The country's economic and social reforms are supported by a number of bilateral and multilateral trade agreements. In particular, Thailand is an active member of the Association of Southeast Asian Nations (ASEAN) and has developed close ties with other ASEAN members. The combination of national reforms, strategic geographical location in the centre of the Greater Mekong Subregion and strong ties with ASEAN countries, contribute to make Thailand an attractive regional trading hub.[10]

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[9] http://thaiembdc.org/thailand-4-0-2
[10] https://home.kpmg.com/content/dam/kpmg/sg/pdf/2018/07/ASEAN-GUIDE-Thailand.pdf (PDF 876KB)

The ASEAN Economic Community (AEC) aims to bring together the ASEAN (Association of Southeast Asian Nations) member nations into a single market that is able to compete in the global economy by 2025. ASEAN members include Brunei, Burma (Myanmar), Cambodia, Indonesia, Laos, Malaysia, the Philippines, Singapore, Thailand and Vietnam, plus two observers Timor-Leste and Papua New Guinea. The AEC's economic integration will provide for the free movement of trade, labour and capital within the region. The purpose of the AEC is to bring economic prosperity and stability to the region and to work toward eliminating the development gaps between ASEAN members.

The Thai Ministry of Education has also identified a reform plan to support the development of Thailand into an international education hub in the ASEAN region. Specific objectives of this development plan include to:

- develop students' skills in the English language and the languages of neighbouring countries
- enhance Thai students' knowledge of the ASEAN community
- relax regulations, such as those concerning visa issuance, to facilitate the travel of foreign teachers and students to Thailand
- develop the national qualifications framework in preparation for students' credit transfer within ASEAN and educational liberalisation in the region
- work with other ASEAN members, to progress the free flow of skilled labour in seven fields: engineering, architectural, surveying, nursing, medical, dental and accounting services.[11]

Underpinning is Thailand's commitment to the Master Plan for ASEAN connectivity 2025, and to the development of a higher education common space in Southeast Asia, both aiming at facilitating academic and labour mobility, through exchange programmes and credit transfers, and qualifications recognition agreements.[12] To that end, Thailand participated in the SHARE project, a programme by EU and ASEAN to strengthen regional co-operation and enhance the quality, regional competitiveness and internationalisation of ASEAN higher education institutions and students.[13]

The Office of the Higher Education Commission (OHEC), the central administrative body under the Ministry of Education with responsibility for higher education, has over the years promoted the regional integration and broader internationalisation of the Thai higher education sector, lately through the development of *Preliminary Guidelines on Internationalization* following engagement with the European Union (EU) under the Thailand-EU Policy Dialogue Support Facility.[14] Thailand's 2017's 20-year Education Strategic Plan, also sets out to improve the competitiveness of the country's higher education institutions, including by increasing the worldwide rankings of top Thai universities, and increasing research output.[15]

Before looking into more detail at the internationalisation agenda for Thai higher education, including policy and guidelines for in-bound TNE, the next sections give an overview of the Thai higher education landscape and its operating environment.

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[11] http://monitor.icef.com/2013/05/opportunities-await-foreign-educational-providers-as-thailand-prepares-for-asean-community/
[12] https://asean.org/storage/2016/09/Master-Plan-on-ASEAN-Connectivity-20251.pdf (PDF 2.40MB)
[13] www.share-asean.eu
[14] https://drive.google.com/file/d/1qYgWXaa8cMo8MmnElfjrctdc__7e6Yhb/view
[15] www.onec.go.th/us.php/home/category/CAT0001145

The Thai higher education landscape

Higher education in Thailand has experienced a significant expansion over the course of the past decades. There are now 156 officially recognised higher education institutions from the handful existing in the 1970s. This growth has been driven by the massification of education, with student numbers in higher education growing from less than 130,000 in the 1970s to over two million in 2015, even though student numbers have started to decrease in recent years due to demographic decline[16] and gross enrolment ratio, currently at about 49 per cent, has not seen significant growth over the past 10 years.[17]

The current higher education landscape include 84 public higher education institutions, consisting of 26 autonomous universities, 11 public universities, 38 Rajabhat universities (developed from teacher training colleges but now offering a broad range of programmes beyond focusing on developing local communities), and nine Rajamangala universities of technology (developed from institutes of technology, and focusing on science and technology), together with 72 private higher education institutions.[18] About 86 per cent of the student population study in public higher education institutions. Most institutions (over 30 per cent) are concentrated in Bangkok.

The landscape is varied, with higher education institutions ranging from multi-disciplinary research-intensive universities, to specialised institutions (for example, Buddhist universities, nursing colleges, or military academies) and community colleges offering flexible vocational training courses. Autonomous universities started to be established in the 1900s, and unlike public universities, which receive funding based on the number of enrolled students and are administered directly by government, they receive block grants from the government and are overseen by an independent university council.[19]

The two largest public universities are the two open universities, Ramkhamhaeng University and Sukhothai Thammathirat Open University, established in the 1970s to meet the growing demand for education in the country, particularly in rural regions. They account for over 60 per cent of higher education enrolments in Thailand, offering programmes on various campuses throughout the country, as well as via distance-learning programmes. Ramkhamhaeng University is considered one of the largest universities in the world.[20]

In 2009, OHEC launched the National Research University Initiative and Research Promotion in Higher Education Project, granting extra financial support to nine research universities to build national research capacity and enhance the country's competitiveness, and promote Thailand as a regional hub for education, research and development.[21]

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[16] http://inter.mua.go.th/wp-content/uploads/2016/07/Thai-HE-fact-figures_edited.pdf (PDF 520KB)
[17] http://uis.unesco.org/country/TH
[18] http://inter.mua.go.th/history-of-thai-higher-education
[19] https://wenr.wes.org/2018/02/education-in-thailand-2
[20] www.worldatlas.com/articles/universities-with-the-largest-enrollments-in-the-world.html
[21] https://drive.google.com/file/d/0B0tJlz-N98SrMktZOW1ES1NNclk/view (PDF 38.9MB)

Thailand's nine National Research Universities

- Chiang Mai University
- Chulalongkorn University
- Kasetsart University
- Khon Kaen University
- King Mongkut's University of Technology Thonburi
- Mahidol University
- Prince of Songkla University
- Suranaree University of Technology
- Thammasat University

Another OHEC-led initiative aimed at strengthening the Thai higher education system and its role in contributing to the creation of a knowledge-based economy is Thailand Excellence 2030, which comprises of three projects, the World Class University Project, the Project on Higher Education Human Resources Development to Cope with the Channing Global Context, and the Project on Standard Development of New Group of Higher Education Institutions and Preparation for the ASEAN Community. The World Class Project includes a set of staggered goals aimed at supporting the establishment of sustainable university consortia and strengthening collaboration amongst university and industry, as well as developing a ranking system for Thai universities to drive innovation and excellence and improve world university rankings.[22]

There are six levels in the *Thai Qualifications Framework for Higher Education* with a corresponding minimum requirements of credits for each level: (1) Advanced Diploma, with a minimum of 90 credits; (2) Bachelor, with a minimum of 120/150/180 credits; (3) Graduate Diploma, with a minimum of 24 credits (following Bachelor); (4) Master, with a minimum of 36 credits (following Bachelor); (5) Higher Graduate Diploma, with a minimum of 24 credits (following Master); and (6) Doctor, with a minimum of 48 credits (following Master) or minimum of 72 credits (following Honours Bachelor Degree).[23]

Thailand has developed the *Thai Qualifications Framework for Higher Education* to ensure consistency in both standards and award titles, and facilitate international comparability of qualifications and international student mobility. The framework sets out the expected attributes of graduates at different levels of qualifications across five domains of learning outcomes: (1) ethics and moral development; (2) knowledge; (3) cognitive skills; (4) interpersonal skills and responsibility; and (5) numerical analysis, communication and IT skills. Subject-specific attribute disciplines, at both undergraduate and graduate levels, have so far been developed for 22 subject areas: Computing, Nursing, Logistics, Tourism and Hotel Management, Engineering, Accounting, Education, Thai Language, Science and Mathematics, Applied Thai Traditional Medicine, Physical Therapy, Dentistry, Home Economics, Public Administration, Pharmacy, Fine and Applied Arts, Environmental Science and Technology, Technology, Thai Traditional Medicine, English, Medicine, and Law.[24]

The university admissions process in Thailand is generally based on both the upper-secondary school grades and the results from standardised entrance examinations. In 2018, a new admissions process has been introduced to widen access to higher education to underrepresented and socially disadvantaged sectors of the population. In recent years,

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[22] http://inter.mua.go.th/higher-education-policies/
[23] www.mua.go.th/users/tqf-hed/news/FilesNews/FilesNews8/NQF-HEd.pdf (PDF 128KB)
[24] www.mua.go.th/users/tqf-hed/news/news6.php and
www.ratchakitcha.soc.go.th/RKJ/announce/search_result.jsp?SID=8847181571C63FF947CEC9E4EAA4D68D

the demographic decline has started to have an impact on the competitiveness of the university admission process. It has been reported that, in 2015, far less people applied to take entrance exams than available places, leaving more than 50,000 places empty. This trend is starting to induce universities to rationalise their educational offer, in particular for the social sciences which is the disciplinary area most affected by the dwindling student numbers.[25]

At the same time, the government, as part of its plan to improve the quality and relevance of higher education in the country, has introduced measures to allow high-quality foreign higher education institutions to open branches in the EEC special economic zone. These measures are not seen by government as posing a threat to Thai higher education institutions, as foreign providers will only be allowed to offer courses that are not already currently being offered in the country, especially in the vocational sector. Growing quality foreign provision in the country is also regarded as contributing to raise the international reputation of the Thai higher education sector and making it a successful higher education hub.[26]

The Thai higher education regulatory framework

The Office of the Higher Education Commission (OHEC) is the department of the Ministry of Education responsible for managing higher education provision and promoting higher education development. It sits alongside the Office of the Education Council, which oversees the development and implementation of educational policies and plans at all levels of education, and the Office of the Basic Education Commission, the Office of the Vocational Education Commission, and Office of the Private Education Commission, overseeing the respective areas of educational policy.

OHEC's mission is that of supporting the development of the national quality assurance system within all public and private higher education institutions, with a specific mandate to:

- formulate policy recommendations and higher education development plans
- provide recommendations on resource allocation for higher education development
- set higher education standards in line with international standards
- monitor and evaluate outcomes of higher education institutions.

While OHEC retains the responsibility for devising criteria and procedures to support and enhance internal quality assurance processes for Thailand's higher education institutions,[27] the implementation of the external quality assurance system is delegated to the Office for the National Education Standards and Quality Assessment (ONESQA).[28] ONESQA, established in 2000 as an independent public organisation per mandate of the 1999 National Education Act, is responsible for the different aspects pertaining to the development of an external quality assessment system. These include the development of processes, standards and criteria for external quality assessment, undertaking assessment of education institutions and supporting their improvement, and training external assessors.

The National Education Act requires that all institutions must undergo external quality assessment every five years, with results being made available to the public. ONESQA is

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[25] https://asiancorrespondent.com/2016/06/thailand-university-crisis-student-enrollments-decline/#AyuRSB8wYXiZtv0P.97
[26] https://thepienews.com/news/thailand-open-up-to-foreign-institutions/
[27] www.mua.go.th/users/bhes/bhes2/56-12-27%20Manual%20for%20the%20Internal%20Final.pdf (PDF 2.78MB)
[28] www.onesqa.or.th/th/index.php

currently conducting the fourth round of external quality assessment (2019-24). ONESQA's quality assessments cover both institution and faculty levels and are adapted to purposes set by each institution and institutional categories established by the Ministry of Education.

The 2008 Ministerial Announcement regarding the Standards of Higher Education Institutions divide Thai higher education institutions into four groups:

- Group A: Community colleges which offer sub-degree, vocationally oriented education that matches the economic and labour needs of the local communities
- Group B: Institutions which offer education primarily at bachelor degree-level and contribute to the economic and labour needs at the regional level
- Group C: Specialised institutions which offer specialised bachelor or graduate-level degrees, as well as vocational training, in specific fields
- Group D: Research intensive institutions operating at national level, carrying out advanced research and offering graduate-level studies, including doctorate and post-doctorate levels.

As per OHEC's instructions, quality assessment mechanisms must be adapted to suit the different purposes of the four groups of higher education institutions. A key feature of the Thai quality assurance systems is the prominence played by international quality assurance. All higher education institutions, both public and private, must carry out annual internal quality assurance reviews following the guidance and criteria set out in the OHEC Manual for Internal Quality Assurance.[29]

Institutions and their faculties are required to appoint units or committees with the responsibility to develop and implement a mechanism for internal quality assurance in line with the principles and policies set by OHEC. Both institutional and faculty-level committees must include external assessors who have been trained by OHEC. The outcome of the internal quality assurance process should be a self-assessment report which should be made available to the public and presented both to the governing body of the institution as well as OHEC.

Self-assessment reports also inform the external assessment process carried out by ONESQA. For the fourth round of external quality assessment, ONESQA has reviewed its processes to respond to requests of lessening unnecessary burden placed on institutions. On the basis of the reviewed procedures, only the executives of institutions are required to prepare and submit the self-assessment report used for external quality assurance purposes. The report, which can be as short as two pages, will need to articulate just three key points: the category of excellence the institution belongs to (there are five categories based on the quality of resources and facilities), provide evidence that the institution belongs to the claimed category, and develop a plan to demonstrate how the institution intends to improve its provision.[30]

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[29] www.mua.go.th/users/bhes/bhes2/56-12-27%20Manual%20for%20the%20Internal%20Final.pdf (PDF 2.78MB)
[30] www.bangkokpost.com/news/general/1519570/after-delays-onesqa-to-begin-evaluations

The internationalisation of Thai higher education

Compared to other Asian countries like China, India or Vietnam, Thailand is not a big sending country of international students. According to UNESCO data, around 30,000 Thai students were studying overseas in 2017, a decrease of 1.6 per cent over the previous year, against an increase of about 13 per cent over the past five years.[31] The US and the UK are the most popular destinations for Thai students. With 6,175 Thai students enrolled in higher education programmes in 2016-17, Thailand represents the ninth largest non-EU sending country of international students to the UK, according to latest available HESA statistics.[32]

Thailand is, however, a popular regional study destination, attracting around 12,000 students in 2017, representing the third most popular study destination in Southeast Asia after Malaysia and Singapore. Most of these students come from other ASEAN or nearby Asian countries, with China being the largest sending country by far, followed by Myanmar, Cambodia, Laos and Vietnam. Indeed, Thai authorities seek to promote Thailand as a regional education hub to offset falling domestic student numbers.

OHEC has, over the years, encouraged and supported the internationalisation of Thai higher education providers. This has traditionally focused on supporting regional student mobility through regional exchange programmes such as the ASEAN International Mobility for Students (AIMS) programme, aimed at facilitating credit transfer in the ASEAN region as part of the harmonisation of higher education in Southeast Asia, and the Thailand-ASEAN Exchange Program. However, more recently OHEC has been working to develop a more strategic approach aimed both at creating an international learning and teaching environment which can benefit all students and staff, not only those involved in overseas mobility programmes, and at improving the international preparedness and competitivity of Thai higher education providers, thus helping to position Thailand as a higher education hub in the ASEAN region.

In 2018, OHEC has published the *Preliminary Guidelines on Internationalization (IZN): Fulfilling the Quality of Global Citizenship*[33] which introduces comprehensive guidelines to support the internationalisation of Thai providers, also covering quality assurance processes. The guidelines build on the *Report on Internationalisation Policy & Strategy: Measurement of University Internationalisation Performance and Relative Improvement*, developed with the support of the Thailand-EU Policy Dialogue Support Facility as part of a strategic effort to strengthen Thai-EU bilateral dialogue and cooperation in higher education and its internationalisation.[34] The report provides a comprehensive assessment of the extent to which Thai universities have internationalised, and offers policy and strategic recommendation of the steps they can take to further their internationalisation efforts. These include the need for Thai higher education providers to:

- take a more active and consistent role in monitoring and evaluating the quality of their internationalisation activities
- leverage existing facilities and invest in new equipment to establish opportunities for virtual mobility with new and existing partner institutions
- develop a unified Thai higher education brand with worldwide visibility showcasing the unique benefits and opportunities of study in Thailand.

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[31] http://data.uis.unesco.org
[32] www.hesa.ac.uk/data-and-analysis/students/where-from
[33] https://drive.google.com/file/d/1qYgWXaa8cMo8MmnElfjrctdc__7e6Yhb/view (PDF 1.82MB)
[34] https://drive.google.com/file/d/0B0tJlz-N98SrN3BycFhZUWVWZG8/view (PDF 37.9MB)

Increasing the number of transnational education partnerships is a key part of the country's strategy for internationalising its higher education sector and enhancing its international attractiveness and reputation. The number of international partnerships have doubled over the past five years, with a total of 135 collaborative programmes between Thai and overseas higher education providers registered with OHEC in the 2015-16 academic year, including 87 joint, double and dual degree programmes registered. This is not a comprehensive account of all existing international academic collaborations in Thailand, since there is no formal requirement for TNE partnerships to obtain formal approval from OHEC. However, in practice most partnerships do apply for OHEC's approval since it is needed for their graduates to be eligible to apply for public sector employment and further studies at public education providers, as well as representing a sign of quality to perspective students.[35]

Another increasingly important part of the internationalisation of Thai higher education is represented by the growing number of English-taught programmes offered by Thai providers and leading to Thai degrees. These programmes are seen favourably by the Thai authorities as they tend to be attractive to international students. In some cases, these programmes are also conducive to the establishment of TNE partnerships.

As part of the government effort to develop Thailand into a higher education hub, in September 2017 new policies have been passed aimed at promoting higher education through 'highly potential' foreign institutions. The new policies aim to streamline and facilitate the establishment of branch campuses of foreign providers. Although rules on foreign branch campuses were already introduced in the Private Higher Education Act of 2003, no such campuses were approved until the 2017 policies, which will be looked at into more details in the following section.

The Thailand regulatory framework for transnational education

Thai universities do not need to obtain ministerial approval to deliver higher education programmes. This applies also to collaborative programmes leading foreign awards. However, as mentioned before, most collaborative partners seek OHEC's approval seen by students as a guarantee of quality and recognition of their qualifications for public sector jobs or further studies at public providers.

The OHEC approval process for TNE collaborative programmes is based on a review of the proposed programme's curriculum to ensure it meets OHEC's Curriculum Standards Criteria, which are published for each subject area.[36] This review, carried out by the applying providers themselves, should be repeated every three years and the outcome communicated to OHEC, for the programmes to continue to be registered. Apart from this, there is no other requirement. In particular, tuition fees can be set autonomously by the providers, and programmes can be delivered at any level and follow any model.

However, it is noted that for collaborative programmes based on articulation agreements involving credits transfer, there is a requirement that students study at the foreign university for at least half of the full duration of the programme in order for their qualifications to be

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[35] The following sections looking at the regulatory requirement for TNE in Thailand are based on the British Council report Transnational Education in Thailand https://education-services.britishcouncil.org/sites/siem/files/field/file/news/ThailandReport_2018.pdf (PDF 1.99MB)

[36] Of all registered joint, dual and double degrees, about half are in science and engineering, 20% in business related areas, and 13% in language and literature. Most of the language programmes are in Chinese offered in cooperation with universities in Mainland China. https://education-services.britishcouncil.org/sites/siem/files/field/file/news/ThailandReport_2018.pdf (PDF 1.99MB)

recognised in Thailand for public sector purposes. Also, while there are no legal restrictions for the delivery of distance-learning programmes in Thailand, qualifications obtained through distance learning will not be recognised for public sector purposes.

As for branch campuses, under the new policies, foreign higher education providers wishing to set up a campus in Thailand can receive expedited approval by a committee headed by the Ministry of Education without having to go through the legislative process. Foreign branch campuses are eligible to a number of incentives if operating in the Eastern Economic Corridor (EEC), such as exemption from corporate income tax, and exemption of restrictions on foreign land ownership, and relaxed visa measures and lower rates of personal income tax for employees. The EEC comprises three provinces in the east of the country, a few hours' drive of Bangkok, which the Thai government has identified for attracting foreign investment.

Applications for setting up branch campuses are subject, however, to a number of restrictions, which are evaluated by the Ministry on a case-by-case basis. In particular, foreign providers must be a 'renowned foreign higher education institution', for which international rankings will be used as a key indicator. Although fees are not regulated, branch campuses, just as local private providers, must reinvest at least 70 per cent of any profits into the local operation. In addition, branch campuses are allowed to operate only in the EEC special economic zone, unless they are partnering with public domestic providers, and can only offer programmes on the 10 strategic areas identified under Thailand 4.0. This is to ensure that they serve the country's strategic development needs, and avoid competition with domestic providers in the context of declining student numbers. Decisions, however, will be made on a case-by-case basis, and other subject areas, or lower overall international rankings, might also be considered on the discretion of the Ministry, if applicants can demonstrate they propose provision will be supporting the long-term development of the country.

Branch campuses can be set up either as independently-operated by foreign providers, or as joint-institute in partnership with local providers. Following the issuing of the new policies, two overseas universities have already been approved for setting up branch campuses: Carnegie Mellon, which will be establishing a joint postgraduate-focused institute with King Mongkut's University of Technology; and National Taiwan University, which will set up a solely-owned campus in the EEC. Another option open to foreign providers is to set up a private education institution integrated within the Thai higher education system. For example, Webster University Thailand operates as an international campus of Webster University in the USA, but it is registered as a private Thai university.

As for quality assurance requirements, branch campuses will be expected to conduct annual internal quality assessment and report the outcomes to OHEC, and be subject to external quality scrutiny every five years, just as domestic Thai higher education providers.[37]

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[37] https://education-services.britishcouncil.org/sites/siem/files/field/file/news/ThailandReport_2018.pdf
(PDF 1.99MB)

The UK TNE landscape in Thailand

Currently the extent of UK TNE in Thailand is very limited. According to the list of foreign collaborative programmes registered with OHEC, there were 12 partnerships involving 14 UK higher education providers and leading to UK higher education degrees (see Table 2).[38] This makes the UK the fourth most popular partner country behind China, Japan and the US.

If we look instead at the latest data from the HESA Aggregate Offshore Record, referring to the academic year 2016-17, there was a total of 886 students studying for a UK award in Thailand delivered by 56 degree-awarding bodies. If we exclude distance learning, which accounts for 562 students, 12 UK degree-awarding bodies are currently offering their degrees in the country to 324 students. The top provider is the University of Nottingham with 105 students, followed by the University of Northumbria at Newcastle (47 students), Oxford Brookes (37 students), Birmingham City and Nottingham Trent (34 students each), the University of Northampton (27 students), and Heriot-Watt (20 students).

Table 2: UK-Thailand collaborative degree programmes acknowledged by OHEC

Thai partner	UK partners	Degree awarded
Chulalongkorn University	University of Liverpool, UK	Joint PhD
Assumption University	University of the West of England, UK Anglia Ruskin University, UK University of Brighton, UK	Dual/triple MBA degree
Mahidol University	University of Sussex, UK	Dual bachelor's degree (Biomedical Science)
Mahidol University	University College London, UK	Dual master's degree (Computer Science)
Mahidol University	Liverpool John Moores University, UK	Dual PhD (Sports Science)
Prince of Songkla University	University of Nottingham, Malaysia Middlesex University, UK	Dual bachelor's degree (Business Administration)
Silpakorn University	Kingston University, UK	Dual bachelor's degree (Event & Leisure Marketing)
Silpakorn University	Birmingham City University, UK	Dual bachelor's degree (Digital Communication Design)
Srinakharinwirot University	University of Nottingham, UK	UK bachelor's degree (Medical Sciences) Thai MD degree
Thammasat University	University of Nottingham, UK	Dual bachelor's degree (Engineering)
Kasetsart University	University of Reading, UK	Thai bachelor's degree (Biotechnology)
Kasetsart University	University of Reading, UK	Thai bachelor's degree (Food Science & Technology)

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[38] https://education-services.britishcouncil.org/sites/siem/files/field/file/news/ThailandReport_2018.pdf (PDF 1.99MB)

Mahanakorn University of Technology	University of Sheffield, UK	UK bachelor's degree (Chemical Engineering) UK bachelor's degree (Civil Engineering) UK bachelor's degree (Electronic, Electrical & Computer Engineering)
Mahanakorn University of Technology	University of Sheffield, UK Oxford Brookes University, UK	UK bachelor's degree (Mechanical & Automotive Engineering)

The UK-Thailand Transnational Education Development Project

Recognising the potential of TNE expansion in Thailand, the British Council has been delivering since 2015, the UK-Thailand TNE Development Project[39] in collaboration with OHEC. The project is designed specifically to provide capacity and funding support to develop new partnerships between Thai and British higher education providers capable to meet the strategic needs of Thailand 4.0. The project initially involved nine research intensive universities in Thailand, but it has now expanded to a broader range of higher education providers across the country. Table 3 lists the programmes developed under the UK-Thailand Transnational Education Development Project.[40]

Table 3: UK-Thailand TNE Development Project joint programmes

Thai partner	UK partner	Programme
Bangkok University	Middlesex University	• BA (and MA) in International Tourism Management, Health and Wellness Tourism Experience
Chiang Mai University	University of Reading	• MSc in Food Science and Technology
Chiang Mai University	University of Westminster	• MSc Digital Innovation and Financial Technology • MSc in Digital Business
Chulalongkorn University	University of Liverpool	• PhD Biotechnology • PhD Bioinformatics and Computational Biology • MSc Biotechnology
Kasetsart University	University of Westminster	• PhD Biological Science
Khon Kaen University	University of Liverpool	• PhD Tropical Disease Biology/ Tropical Medicine

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[39] www.britishcouncil.or.th/en/programmes/education/our-work-support-higher-education-and-research-sector/uk-thailand-transnational-education-development-project
[40] www.britishcouncil.or.th/en/tne-programmes-and-admissions-1

King Mongkut's University of Technology Thonburi	University of Reading	• BSc Microbiology
King Mongkut's University of Technology Thonburi	University of Sheffield	• BEng Industrial and Intelligent Systems Engineering
Mae Fah Luang University	King's College London	• BSc Food Science and Technology
Mahidol University	University of Strathclyde	• BEng (Biomedical Engineering) • BEng (Engineering Chemical)
Naresuan University	Newcastle University	• MA/PhD Social and Sustainable Development • Postgraduate Certificate in Research Training
National Institute of Development Administration	University of Hull	• MSc Logistics and Supply Chain Management
Prince of Songkla University	University of Westminster	• BSc Information and Communication Technology
Prince of Songkla University	University of Manchester	• BSc in Medical Technology • MRes Infection Biology
Suranaree University of Technology	University of Birmingham	• BEng (Mechanical Engineering)
Suranaree University of Technology	Goldsmiths, University of London	• Master of Management in Innopreneurship and Business Design • MA in Social Entrepreneurship
Thammasat University	Queen Mary University of London	• MSc Clinical Dermatology • MSc Aesthetic Medicine
Thammasat University	SOAS, University of London	• BA in Thai Studies • BA in SEA Studies
Walailak University	Coventry University	• BBA (Global Tourism and Hospitality Management)

Conclusions

Despite UK TNE in Thailand, and inbound TNE in general, being currently limited, the country shows potential for expansion. The Government has passed new policies making it easier to establish branch campuses, offering a number of incentives to attract quality foreign providers to set up operations in the EEC and help the country meet the strategic development needs set out in Thailand 4.0. OHEC has developed new guidelines for internationalisation, calling for and committing to support the development of more international partnerships with foreign higher education providers, including TNE partnerships. The UK-Thailand Transnational Education Development Project, jointly supported by OHEC and the British Council, has already supported the development of 19 UK-Thai TNE partnerships.

Thailand is also one of the ASEAN countries with the higher number of international students, with ambition to become a higher education hub in the region. With the creation of the ASEAN Economic Community it is expected that the free flow of people across the AEC will further increase the number of international students coming to study in Thailand.

However, the steady demographic decline poses important challenges, in particular as it might set foreign provision in competition with domestic providers for a dwindling local student population. This challenge could be offset by Thailand's long-term development as a destination for international students, as well as by focusing the TNE offer in the strategic disciplinary areas outlined in Thailand 4.0 for which there is little local supply. TNE provision might indeed play an important role in developing Thailand as a regional and international higher education hub, and collaborative partnerships specifically in developing local providers' capacity and international reputation. This is also seen as a way to help retain local students who would go overseas for an international quality education. Low level of English language proficiency and lack of familiarity with TNE provision amongst Thai students might, however, represent obstacles.[41]

Political change might also be a challenge considering, in particular, the favourable support towards welcoming foreign provision in the country recently expressed by the current Ministry. However, any eventual impact of political change can be expected to be limited to the new policies facilitating the development of foreign branch campuses, rather than TNE provision in general. Collaborative partnerships, such as joint and double degrees, are generally less politically contentious, and are supported by local providers which regard them as a way to help their internationalisation efforts and raise their international competitiveness and reputation.

With the Thai Government and OHEC proactively encouraging and supporting the internationalisation of Thai higher education, including through TNE, and high local and regional demand for quality and international education, Thailand, strategically located at heart of Asia and the ASEAN region, represents a country with significant potential for UK providers considering growing their TNE footprint in East Asia.

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[41] www.bangkokpost.com/news/general/1570042/thai-english-proficiency-drops