



A STRATEGY FOR ATTRACTING INTERNATIONAL STUDENTS



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DOSSIER DE PRESSE

“There’s going to be a sharp rise in student mobility numbers in the world in the next few years. France will have to increase the number of foreign students on its territory, and the number of those from emerging countries will double because the French language is an asset we share. There will be more Indian, Russian and Chinese students, and so there should be.

We must now do everything in our power to overhaul the conditions in which they are received. So I’ve asked the Minister of Higher Education to draw up a comprehensive plan with the support of Campus France. This plan will be presented at the start of 2019.

Learning French in our country, in places where we’d sometimes abandoned it, learning French in the French-speaking world and elsewhere is thus the basis, the bedrock on which we can build”

Emmanuel Macron, President of the French Republic
in remarks to the *Institut de France* on 20 March 2018

KEY FIGURES*

212 million postsecondary students in the world

More than 290 million by 2025

5.5 million internationally mobile students

9 million by 2025

324,000 international students, including **245,000** pursuing a degree abroad (2016)

4th host country for international students, **1st** non-English-speaking host

7,000 beneficiaries of French government scholarships presently studying in France

37,000 students attending a French higher education program outside France

+ 600 French programs offered abroad

140 French higher-ed facilities operating abroad

+ 320 French degree programs offered outside France

** The data in this document are published by the UNESCO Statistical Institute and allow comparisons to be made between countries. Counted as an international student is any student who has crossed an international border for the purpose of participating in an educational activity in the destination country, provided the activity leads to a degree and the student is not a national of the destination country. Only degree-seeking students are counted, thus excluding exchange programs, non-degree language study, internships, and other short stays. Because the data have been consolidated only through 2016, that year is used as the reference year for comparisons. Complete analyses are published in Campus France's annual Chiffres Clés.*

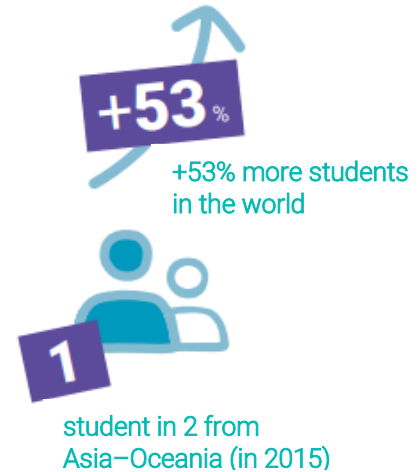
THE STRATEGIC CHALLENGE OF ATTRACTING INTERNATIONAL STUDENTS

STRONG GROWTH IN THE NUMBER OF MOBILE STUDENTS

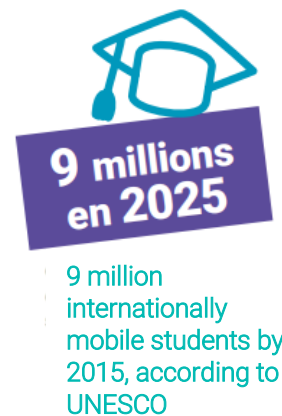
The number of postsecondary students in the world has risen more than **50 %** in the past 10 years, pointing to the possibility of **80 million additional students between now and 2025**. The world's 5 million internationally mobile students make up 2.2 % of all postsecondary students and may double to **reach 9 million** by 2025.

The most spectacular growth has been in students from Asia-Oceania (+90 %, or +51 million), ahead of Sub-Saharan Africa (+72 %, +3.5 million) and the Middle East (+72 %, +5.1 million). Growth in the mobile student population is weakest on the European continent.

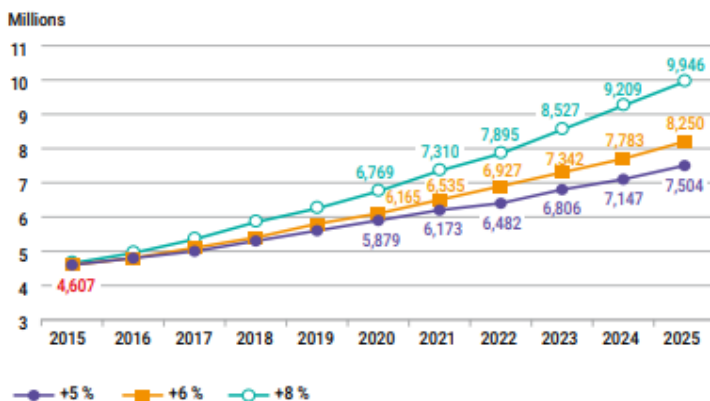
In the past 10 years



By 2025



Projected growth in international student mobility, 2015–25



Source : estimations Campus France à partir de la base de données UNESCO (extraction janvier 2018).

AN INTERNATIONAL SITUATION

FAVORABLE TO FRANCE IN MANY WAYS

BUT FRANCE COULD SLIP FROM ITS POSITION AS THE WORLD'S 4TH MOST POPULAR HOST COUNTRY

According to the latest UNESCO data, France is the 4th most popular choice of internationally mobile students after the United States, the United Kingdom, and Australia. And it is the first non-English-speaking country in the rankings, just ahead of Germany. Important advantages make France a favored destination: prestigious postsecondary institutions; cutting-edge science and research; a central place in the European Union and the francophone world; a proud history; a rich culture; and a renowned quality of life.

Top 20 host countries for degree-seeking international students (2016)

PAYS D'ACCUEIL	Étudiants internationaux	Évolution des effectifs		Rang	
		Sur 3 ans (2013-16)	Sur 5 ans (2011-16)	2011	2016
États-Unis	971 417	+23,8%	+36,9%	1	1
Royaume-Uni	432 001	+3,7%	+2,9%	2	2
Australie	335 512	+34,3%	+27,8%	4	3
France (*)	245 349	+7,3%	-8,5%	3	4
Allemagne (*)	244 575	+24,4%	ND	6	5
Russie	243 752	+26,0%	+46,9%	5	6
Canada	189 478	+25,3%	+56,6%	8	7
Chine(**)	183 080	+38,2%	+64,6%	7	8
Japon	143 457	+5,6%	-5,3%	9	9
Malaisie	124 133	+59,3%	+95,1%	13	10
Italie	92 655	+12,4%	+25,9%	10	11
Pays-Bas	89 920	+30,4%	+134,4%	21	12
Turquie	87 903	+61,6%	+182,5%	28	13
Arabie saoudite	79 854	+28,5%	+128,7%	25	14
Émirats arabes unis	77 463	+30,8%	+59,2%	17	15
Argentine	75 688	ND	ND	-	16
Autriche	70 483	-0,5%	-0,1%	11	17
Corée du Sud	61 888	+11,4%	-1,3%	14	18
Belgique	61 102	+25,3%	+61,4%	23	19
Pologne	54 734	+97,1%	+164,3%	33	20

(*) Changement de mode de comptage UNESCO en 2013 pour la France et l'Allemagne.

(**) Hong-Kong et Macao inclus.

But France's position is being **hotly contested by its neighbors** (Germany, Russia), by **powerful poles of attraction** (China, Canada), and by **new players** (Saudi Arabia, Turkey, the Netherlands). The number of mobile students worldwide is growing much faster than the number coming to France, threatening France's status as the fourth-ranked host country.

The new players are developing **aggressive new strategies** to enhance their appeal and attract more students, particularly from Asia and, increasingly, from the African continent. Higher education is an **under-recognized instrument of national influence**. The number of international students in a country is an indicator of its **soft power**, the appeal of its university system, its **capacity to train tomorrow's leaders**, and its ability to promote its values. International students also generate income for the host country and for its institutions of higher education while strengthening economic ties and can, if they remain in the country after their training, permanently strengthen the society and economy of the host country. Finally, it is common that **alumni** become excellent ambassadors of the country that educates them. In France, the France Alumni network, established and coordinated by Campus France in cooperation with France's diplomatic posts, brings together 250,000 former students.

Despite its leading international position, France is not among the **top 20 countries with the strongest growth in incoming mobility** between 2011 and 2016, either by volume or by percentage. Although the number of students hosted by France continued to rise between 2016 and 2018, growth was slower than elsewhere, suggesting the possibility of gradual slippage.

Top 20 countries for increased incoming mobility

By volume

	Étudiants internationaux	Progression en volume	
		Sur 3 ans (2013-16)	Sur 5 ans (2011-16)
États-Unis	971 417	+186 990	+261 852
Allemagne	244 575	+47 956	+81 181 (*)
Russie	243 752	+50 265	+77 842
Australie	335 512	+85 644	+72 915
Chine(**)	183 080	+40 278	+71 860
Canada	189 478	+38 234	+68 518
Malaisie	124 133	+46 208	+60 508
Turquie	87 903	+33 516	+56 785
Pays-Bas	89 920	+20 977	+51 553
Arabie saoudite	79 854	+17 711	+44 932
Pologne	54 734	+26 964	+34 023
Émirats arabes unis	77 463	+18 236	+28 810
Belgique	61 102	+12 354	+23 236
Jordanie	47 022	+14 942 (*)	+21 950
Italie	92 655	+10 205	+19 071
Inde	44 766	+10 347	+17 235
Ukraine	54 144	+4 458	+15 367
Iran	18 698	+11 641	+14 356
Danemark	34 034	+4 554	+13 782
Nouvelle-Zélande	53 854	+12 501	+13 000

Classement sur les pays accueillant au moins 10 000 étudiants internationaux en 2016.

(*) Estimation.

(**) Hong-Kong et Macao inclus.

As percentage

	Étudiants internationaux	Progression en pourcentage	
		Sur 3 ans (2013-16)	Sur 5 ans (2011-16)
Iran	18 698	+165,0%	+330,6%
Turquie	87 903	+61,6%	+182,5%
Ghana	15 999	+48,1%	+181,6%
Pologne	54 734	+97,1%	+164,3%
Pays-Bas	89 920	+30,4%	+134,4%
Arabie saoudite	79 854	+28,5%	+128,7%
Malaisie	124 133	+59,3%	+95,1%
Maroc	17 029	+71,1%	+88,1% (*)
Jordanie	47 022	+46,6% (*)	+87,5%
Qatar	10 788	+26,8%	+74,3%
Chine (**)	183 080	+28,2%	+64,6%
Danemark	34 034	+15,4%	+68,1%
Inde	44 766	+30,1%	+62,6%
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Belgique	61 102	+25,3%	+61,4%
Roumanie	25 824	+19,8%	+60,6%
Émirats arabes unis	77 463	+30,8%	+59,2%
Hongrie	26 155	+26,4%	+58,9%
Canada	189 478	+25,3%	+56,6%
Thaïlande	31 571	+49,7% (*)	+56,6%

Classement sur les pays accueillant au moins 10 000 étudiants internationaux en 2016.

(*) Estimation.

(**) Hong-Kong et Macao inclus.

This situation must also be viewed in the context of recent changes in the world's **two leading host countries**:

- For many years, the **United States** has been the top destination for degree-seeking international students: **971,417** were counted in 2016, up **37% from 2011**. But since 2016, America's immigration policies have changed. According to the U.S. Department of State, for the fiscal year ending 30 September 2017, 393,573 student visas were granted, a **17 % drop** from the preceding year. The reduction was particularly marked among the two leading contingents of international students in the United States: **Chinese** (-28 %, to 112,817 visas) and **Indian** (-28 %, to 44,741 visas).
- Likewise, the scheduled departure of the **United Kingdom** from the European Union in March 2019 is likely to alter student flows. The U.K. is presently the second destination of international students globally (**432,000** in 2016, up **+3% over 5 years**) and the leading European country. Next year, France will become the top host country in the Union if it succeeds in maintaining its lead over Germany.

STRATEGIES OF ATTRACTION

FOCUS ON CHINA AND THE MIDDLE EAST

Using different strategies, **China**, **Turkey**, and the **Gulf States** are betting on traditional areas of French influence in North Africa and Sub-Saharan Africa, with **economic stakes** in the case of China (the opening of new markets for Chinese firms under the country's global *One Belt One Road* strategy) and **cultural stakes** in the case of Turkey and the Gulf States.

For China, the world's **8th leading host country in 2016**, student mobility from **Africa** (14% of China's total foreign students) shows the sharpest growth. Since 2003, the average annual rate of growth in African student mobility to China has been more than **35%**. Coupled with an effort to raise the profile of the country's institutions of higher education and to spread the use of its language and soft power, the national strategy relies on the opening of new Confucius Institutes abroad and on funding scholarships in target countries.

In **Saudi Arabia**, 80,000 international students were enrolled in 2016, an increase of **+129%** from 2011. Each year since 2015 the kingdom has doubled the number of **scholarships for African students** and now offers **programs taught in English** delivered in universities with **modern facilities**.

Turkey's policy of international student recruitment has been designed to advance the country's economic and cultural influence and to manage its international image. The establishment of **cultural centers** in Africa and Turkic-language areas, as well as **scholarships** play a large role in the growing appeal of a country that saw the number of international students increase by **182%** between 2011 and 2016.

FRANCE STILL LAGS IN

INTERNATIONAL STUDENT SUPPORT SERVICES





INTERNATIONAL STUDENTS ARE DRAWN TO FRANCE *

A recent Campus France study shows that international students perceive France to be an intellectual and scientific leader with wide cultural and artistic influence and a rich history. Three-quarters (76%) of them also believe that France has a stable and healthy economy.

International students choose France for the quality of educational offerings (46%), the ability to speak French (41%), the reputation of educational institutions and faculty (34%), and the value of French degrees (32%). Above all, however, culture is a strong point of France.

In fact, France's cultural influence is the principal reason behind the country's recruiting success in recent years (78% of citations).

Principal reasons cited for the increased appeal of each country, 2017

	 France	 United Kingdom	 United States	 Canada
Cultural influence	78%	67%	58%	59%
Economic situation	33%	46%	61%	60%
Political situation; current government	31%	27%	21%	53%
Safety and security	29%	26%	24%	54%
Cost of living	29%	11%	22%	31%
Visa policy	24%	13%	18%	42%

THE IMPACT OF THE POLICY SITUATION

IN THE UNITED STATES AND THE UNITED KINGDOM

Recent political events seem to have had a real impact on the appeal of certain countries—among them the election of Donald Trump in the United States (76% of students cite the political situation and current government as a reason for the decline in the country's appeal) and Brexit (54% of respondents cite the political situation as a reason for the decline in Britain's attractiveness).

* "Image et attractivité de la France auprès des étudiants étrangers," Campus France-Kantar study, 2017.

DESPITE THE OBSTACLES IDENTIFIED... *

Although France cultural reputation in the eyes of international students is an indisputable strong point, the country could improve its appeal in other areas, described below.

47% of students who chose France say they strongly considered another country (United States, United Kingdom, Canada...)

One problem is the **complexity of administrative procedures** (cited by 51% of students having studied in France), and **particularly visa policies**. Many procedures are still not paperless and virtual, such as validation of the long-stay visa, for which the student must report to OFII, the French immigration office. Students also have difficulty with applications for social benefits from CROUS (the French student services agency) and CAF (family assistance fund), unless they have already opened a bank account in France.

Another sore point is administrative and visa-related problems associated with **finding a job and maintaining ties with France** after the degree, given that many students would like to be able to return to France to work.

The **high cost of living, especially housing**, is a serious problem. Housing represents a substantial share of student budgets. Its high cost is aggravated by the difficulty of finding and securing lodging in the private rental market, particularly for students who do not speak French. Students often lack the parental guarantee and some of the documents that are customarily required with rental applications in the private market. With respect to health care, international students have trouble understanding the relationship between the system in their home country and the French system. Some steps seem complex to them (such as those related to CPAM, the basic health insurance fund). These pose a significant obstacle for non-French-speaking students, unless they have access to assistance in complying with requirements.

Finally, internationally mobile students, particularly those who do not speak French, **may suffer from feelings of isolation** caused by being far from home, but also, for some, by their poor proficiency in French, which makes it hard to develop close social ties. Many students feel alone and lack structures within which to socialize. The **absence of a uniform program of real support services** on the model of what one finds in neighboring countries, such as the United Kingdom or the countries of northern Europe, reinforces the feeling of isolation from the very first weeks in France. Despite the spread of readily accessible courses in French as a foreign language and courses taught in English, student support services remain disparate and uneven in scope and intensity.

* "Image et attractivité de la France auprès des étudiants étrangers," Campus France-Kantar study, 2017

CHOOSE FRANCE**A GLOBAL STRATEGY****OBJECTIVE: 500,000 INTERNATIONAL STUDENTS IN 2027**

France has set itself the goal of welcoming half a million foreign students by 2027. This projection is based on the growth rates achieved by our close competitors and by the forecasted impact of the **Choose France strategy**.

France also aims to **encourage more French students to study abroad**, whether under university exchange programs or to earn a degree from a foreign institution. Although the European Erasmus program is popular with young French people (more than 40,000 participated in exchanges in 2015), it is even more popular with their neighbors in Europe.

The beginning of the 2019 academic year will see the launch of a strategy based on **simplification of visa policies**, in cooperation with the Ministry of the Interior, an increase in **programs in French as a foreign language and programs taught in English**, a system to **label model programs of support** for foreign students in France, and a global **communications campaign** under the aegis of Campus France. A new support fund entitled Bienvenue en France will be endowed with €10 million and begin operation in 2019.

To finance the new policy, French postsecondary institutions will be permitted to charge new tuition rates for students from outside the European Union. The number of French government **scholarships** for foreign students will be greatly increased. In parallel, steps will be taken to help French institutions set up overseas campuses or otherwise offer academic programs outside France.

#1 SIMPLIFY VISA POLICY

The issuance of visas in students' countries of origin will be streamlined.

- Consulates will give **students priority** in the processing of visa applications.
- The recent implementation of the **France-Visas digital portal** will improve access to information about required documents and provide a better interface with university registration.
- Collection of applications will be facilitated through outsourcing to contracted service providers.

In their first year, international students will hold a long-stay visa that serves as a residency permit (VLS-TS). After mid-2019, it will be possible to **validate visas remotely**, via the Internet, sparing students a visit to the OFII.

Students will transition to **student resident status**, conferred through a multi-year residency permit that will remain valid for the duration of the academic program in which they are engaged.

To make it easier to obtain a permit, **remote issuance points** will be **set up on university campuses**; alternatively, dedicated windows will be set up in prefectures throughout France.

Finally, beginning in March 2019, **foreigners who have earned a master in France** and returned to their home country will be eligible for a **residency permit to return to France to look for a job**. This is a major innovation introduced by a new asylum and immigration law favoring circular mobility, passed on 10 September 2018, consistent with the commitment made by President Macron in a speech delivered in Ouagadougou.

#2 DOUBLE THE NUMBERS IN FRENCH AS A FOREIGN LANGUAGE AND IN PROGRAMS TAUGHT IN ENGLISH

DOUBLE THE NUMBER OF STUDENTS BENEFITTING FROM INTENSIVE TRAINING IN FRENCH AS A FOREIGN LANGUAGE

Today, French is the world's **fifth most widely spoken language**. The Observatoire de la Langue Française at the Organisation Internationale de la Francophonie counts **300 million speakers of French**, including **235 million who use it daily**.

To continue to expand, the French language can rely on institutions such as the many branches of the Alliance Française and the Institut Français. The number of people learning French in these institutions is **689,107**, in **166 countries**. Within France, **150 centers for French as a foreign language** enroll **150,000 learners** each year.

The goal set by President Macron is to **double the number of students coming from emerging countries**, for the most part non-French-speaking. This will require an expansion of opportunities to learn French so that every international student can benefit from intensive courses in French as a foreign language before departure or immediately preceding the first semester of study.

IN 2019

Educational institutions that offer **modules of intensive study of French as a foreign language** to non-French-speaking foreign students will be eligible for financial support from the **Bienvenue en France seed fund** to be set up by the Ministry of Higher Education, Research, and Innovation and endowed with a budget of **€10 million in 2019**.

At the same time, the **offerings of French as a foreign language by distance learning** will be strengthened so that any international student who wishes to put in the time and effort will be able to complete one or more modules of training before arriving in France.

To complement the efforts of France's universities and *grandes écoles*, as well as of the Agence Universitaire de la Francophonie, the **creation of degrees designed for refugee students and scholars**—degrees that will include a large component of French as a foreign language—will be eligible for support from the Bienvenue en France seed fund.

DOUBLE THE NUMBER OF STUDENTS BENEFITTING FROM A PROGRAM TAUGHT IN ENGLISH

Between 2004 and fall 2018, the number of **programs in French institutions taught at least partly in English quintupled**, from 286 to 1,328. Of these **1,328 French–English programs**, 1,015 were taught entirely in English, most at the master’s level. 237 French higher education institutions, 137 of them public, offer programs in English. The most common fields of study are:

- Business/management
- Engineering/technology
- Sciences/environment/health.

But the continued development of programs taught in English is already encountering **legal obstacles**, which will be removed in order to permit any program to be taught in a foreign language as long as it enrolls international students.

In parallel, the **development of programs delivered partly or entirely in English** or in another foreign language will be eligible for support from the **Bienvenue en France seed fund**.

PROGRAMS TAUGHT IN ENGLISH

FOCUS ON THE NETHERLANDS

In the Netherlands, **nearly all postsecondary programs are now offered in English: 2,032 programs** in all, including 1,301 masters et 369 bachelors. In parallel with this development, the Netherlands improved its place in the ranking of countries hosting foreign students from **27th** in 2010 to **12th** in 2016.

#3 CREATE A LABEL TO IMPROVE THE QUALITY OF STUDENT SUPPORT SERVICES

To address the need to improve and standardize **support services for international students** at all French institutions of higher education, the administration intends to introduce a labeling system. To be known as **Bienvenue en France**, the label will be awarded to institutions that provide a set of support services agreed on by higher education representatives in November and December 2018. The label will be **awarded** to institutions **beginning in 2019**. **70 institutions** are already candidates for the label.

Labeled institutions may apply for financial support from the **Bienvenue en France seed fund**. Support will enable institutions to put in place innovative actions to advance the goals of the label.

WHY ADOPT A “BIENVENUE EN FRANCE” LABEL?

- A **national standard**, government-recognized and -certified, guaranteeing the quality of support services offered to international students
- A **sign of quality** on which international students can rely
- A **tool for promoting** French educational institutions abroad
- A **standard metric** to enable institutions to develop a long-term strategy and assess their performance.



To determine the content of the Bienvenue en France label, a **consultative process** will be carried out **with the higher education community** with a view to setting a common standard consistent with the best international practice. Aspects of the label may be based on initiatives already taken by individual institutions.

HOW TO EARN THE “BIENVENUE EN FRANCE” LABEL

All French **institutions of higher education** may compete to be awarded the label.

Institutions will be asked to submit an **application file** that Campus France will examine against the criteria set out in the common standard.

Once the application is accepted, the institution will be able to use the **Bienvenue en France label** in all of its **communications**. The high-quality support services signified by the label will be explained in the promotional efforts of France’s diplomatic posts, Campus France, and the Ministry of Higher Education, as well as in international program catalogs and promotional fairs.

In the event the label is not awarded, the institution will be permitted to reapply the following year after taking steps to improve its services to international students. Campus France experts may provide assistance in this process.

THE CAMPUS FRANCE FORUM...
 ... joins **365 French institutions** working to increase the appeal of French higher education abroad. The goal of the Forum is to facilitate cooperation among all French institutions that represent the quality and distinctiveness of French higher education.

STRONG MEASURES TO IMPROVE SUPPORT SERVICES

To encourage institutions to improve the full range of their support services, the government will immediately adopt strong measures to facilitate the recruitment of international students and encourage them to choose France for their postsecondary studies. Those steps include:

- **Facilitate compliance with administrative requirements** by setting up a single window at which international students can obtain the necessary approvals upon arrival.
- **Facilitate access to housing**
 - o **The Lokaviz platform**, which inventories all housing available in university residences managed by CROUS (France's regionally based student-services agency) as well as private housing (rooms, studios, apartments, group rentals) across France will be translated into English to enable non-French-speakers to understand what is required to obtain housing:
 - amount of rent, utilities and other charges, and any services provided
 - quality (compliance with regulatory requirements governing decent housing, indication of energy performance of buildings)
 - adherence to code of good practices between lessor and lessee
 - location: proximity of higher education institutions, athletic facilities, cultural resources, travel times by public transportation or bike.
 - o **The Visale guarantee** will be available to all international students, enabling them to post a security deposit and improve their access to private rental housing.
- **Facilitate integration into the student community**: each international student will be assigned an adviser within the enrolling institution (university or *grande école*). The adviser will provide necessary assistance, even before the student arrives in France.

INITIATIVES

TO SUPPORT INTERNATIONAL STUDENTS

TOUL'BOX

UNIVERSITÉ FÉDÉRALE DE TOULOUSE

An online package offering various services to help new students get settled. Most steps can be completed prior to arrival. Customized for students, doctoral candidates, instructors, and researcher scholars (from €100 to €200):

- Meeting with the Toul'Box team (welcome pack, help with housing and immigration requirements, etc.)
- Help opening a bank account
- Renter's insurance
- Public transportation pass – Pastel
- SIM card
- Options for temporary housing, reservation for permanent housing
- Assistance with administrative requirements, security deposit
- Guided tour of Toulouse
- Family module (for instructors and research scholars only)
- Health insurance (for instructors and research scholars only)
- Welcome at airport or train station
- Courses in French and other foreign languages

INTERNATIONAL STUDENT WEEK

UNIVERSITÉ DE LILLE

- Evening events: DJ-led dances, concerts, cocktails, shows
- Cultural activities: readings-debates, evening at the Louvre-Lens museum, photography exhibits, literary circles, film screenings and discussions, lectures
- Opportunities for exchange and reflection in other languages (*Eurodrink*, language cafe, *Think Your World workshop*)
- Information sessions on student mobility programs
- Presentation on new Erasmus accords
- International student fair at which international students present their culture to French students
- Athletic activities and events
- Food-related activities: *Melting Pot* buffet, cheese tasting, International Dinner, international menus in university dining facilities, Share My Table (at which international students "host" Lille residents for a meal)

#4 ADOPT DIFFERENTIATED TUITION RATES AND TRIPLE THE NUMBER OF SCHOLARSHIPS

DIFFERENTIATE TUITION RATES FOR GREATER EQUITY

Although international students in France come from different countries and have different living standards, they all pay the same tuition at public institutions: €170 per year in *licence* programs, €243 in master's programs, and €380 in doctoral programs.

France's tuition rates are **among the lowest internationally**. In fact, the French government absorbs most of the real cost of higher education, which is on the order of €9,660 per year, on average.¹ International students now enrolled in *licence* programs pay less than 2% of the real cost of their education and, because they are not subject to French taxation, do not contribute to the financing of the higher education system.

Under this new international recruitment strategy, beginning in fall 2019, international students who are not nationals of a country within the European Economic Area or Switzerland and who enroll for the first time in a postsecondary program in France will be subject to **differential tuition rates** established to introduce **greater equity**. Henceforth, the annual tuition will be €2,770 in *licence* programs and €3,770 at the master and doctoral level, still **less than a third of the real cost of education** and far less than the amounts charged by the countries that enroll the most international students (see box).

A TRIPLING OF SCHOLARSHIPS

In parallel, the strategic recruitment plan provides for numerous exemptions (child, spouse, or partner of a long-term resident; bilateral accords with Quebec, etc.), but most importantly it provides for a **tripling of the number of scholarships offered to international students**, with the goal of opening the way for students who presently lack the means to come to France to study.

- **15,000 French government scholarships** (compared with 7,000 presently), to be awarded by the Ministry of Europe and Foreign Affairs. The scholarships will prioritize students from the Maghreb (North Africa) and from Sub-Saharan Africa. Depending on circumstances, they may take the form of grants of financial assistance or of exemption from tuition.
- **6,000 institutional scholarships**, delivered by universities and schools on the basis of criteria consistent with their partnership and recruitment strategies. These scholarships, too, make take the form of financial awards or of exemptions. In parallel, international doctoral candidates may be able to benefit from specific support programs designed to increase the drawing power of their research laboratories.

¹ The measure of national spending for higher education, computed annually, aggregates all expenses incurred by public and private institutions in metropolitan France and the overseas departments for higher education and related activities. It represents the nation's overall effort to finance higher education. The contributions of households and private companies are not included in the measure.

- France's universities and postsecondary schools will retain the right to charge students admitted under reciprocal bilateral agreements with foreign institutions the same amount of tuition paid by European students. Some **12,500 international students** will thus benefit from an **exemption**, notably students who are not nationals of an EU country but are admitted under exchange programs such as Erasmus+.

Students who are refugees or benefitting from subsidiary protection will be exempted.

Overall, one in four international students will qualify for an exemption or a scholarship.

The new strategy, which combines increases in tuition rates, improvements in support services, and a tripling of scholarships will enable France to **strengthen its place among the top-ranked receiving countries** by attracting more international students seeking a high-quality education. The best of them, even if they come from emerging or low-income countries (and particularly the latter), will benefit from exemptions or scholarships. **The increased revenues collected by higher education institutions will fund the implementation of strong policies of recruitment and influence** around the world, **and will greatly improve support services for international students** prior to arrival and throughout their stay in France. The new revenues will also make it possible to expand courses in French as a foreign language and courses taught in English, thereby favoring the influence of French higher education around the world.

INTERNATIONAL COMPARISON

DIFFERENTIATED TUITION RATES

Many countries have already adopted systems of differentiated tuition, accompanied by increases in scholarships and improvements in student support services. This approach has proved successful on the international scale. In France, many *grandes écoles* offering programs at unregulated rates enjoy strong international appeal. Moreover, France has elected to set its new tuition rates at levels much lower than those prevailing in the countries that draw the most international students (notably the United States and the United Kingdom). Some examples follow.

- At the University of Maastricht, which has the highest percentage of international students in the Netherlands, students from within the European Economic Area pay undergraduate tuition ranging from €2,085 to €3,445, whereas those from outside the EEA pay €7,500 to €10,000.
- In the United Kingdom:
 - o Undergraduate tuition at the London School of Economics is €10,500 for British nationals and Europeans (UK-EU) and €22,500 for internationals. At the master's level, it is €4,800 for UK-EU students and between €20,000 and €38,280 for internationals.
 - o The University of Glasgow, charges UK-EU undergraduates €2,000 ; those from outside the EU pay €18,500.

- In Sweden, EU students pay no tuition at the bachelor or master level. By contrast, internationals pay €8,000 to €26,000 for bachelor (depending on the discipline) and €12,000 for a master.
- **In the Wallonia–Brussels Federation (Belgium):** international students pay €4,175 per year for a bachelor or master, vs. €835 for EEA students and those from countries appearing on a list of the least-developed countries.
- **Australia:** annual tuition for international students ranges from €10,000 to €25,000.
- In **Canada**, the average tuition paid by international students (across all disciplines) is €12,112 at the undergraduate level and €7,556 at the graduate (master and doctoral) level.
- Tuition charges in the United States vary by university and, in state universities, by residency (in-state vs. out-of-state). At private Columbia University in New York, tuition is €50,000 per year for undergraduates and €56,000 to €88,000.

#5 INCREASE OUR PRESENCE AND OUR INFLUENCE ABROAD

FRENCH HIGHER EDUCATION IS EXPORTABLE !

The appeal of French higher education is not measured solely by the number of international students choosing to study in France. It is also fed by the **presence and influence of French institutions operating abroad** in various forms (franchises, satellite campuses, partner institutions). At last count, French higher education institutions had about 140 facilities abroad.

All of these offshore programs lead to degrees recognized in France, regardless of how the French institution is set up or its local legal status. The academic programs are based squarely on the programs of the French institution, accredited by the competent authorities in France, though the specific programs offered are often chosen to respond to local needs.

Top 3 host countries for French offshore higher education

By number of programs

TOP 3 Offre française la plus développée (effectif d'étudiants)
Chine (15%)
Liban (12%)
Maroc (11%)

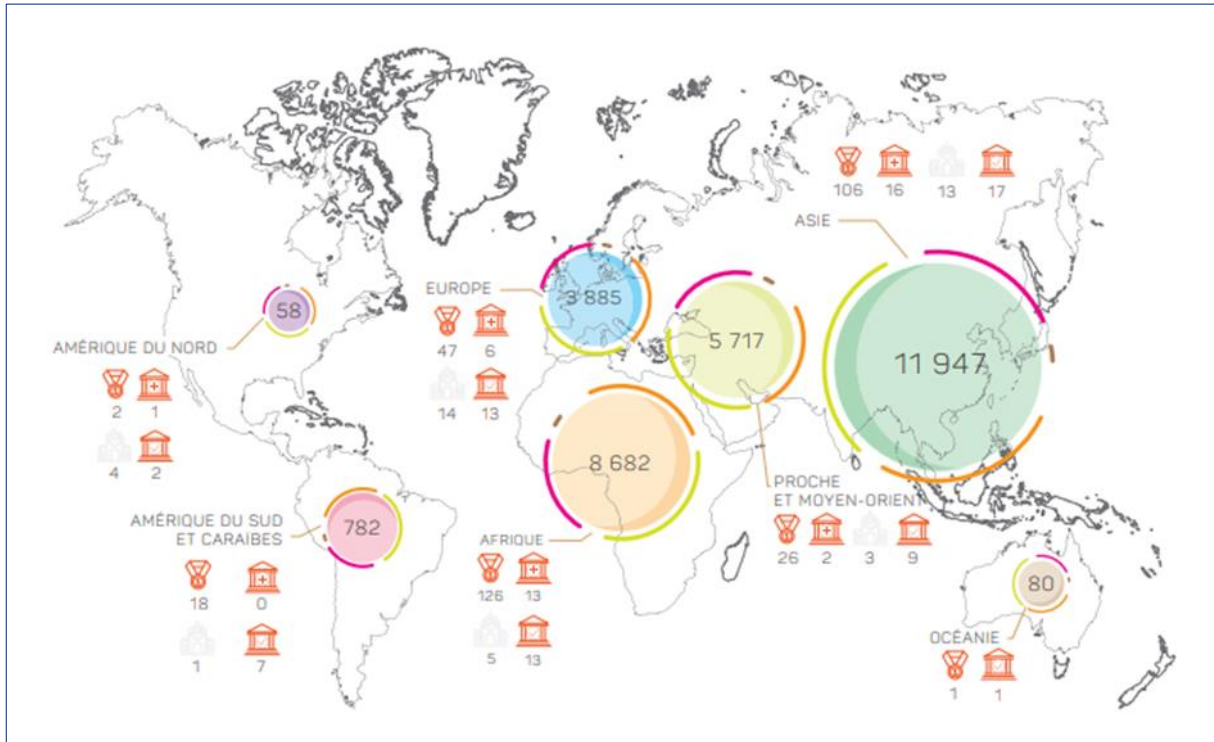
By student enrollments

(% of total enrollment in French offshore programs)

TOP 3 Offre française la plus développée (nombre de formations)
Maroc (75)
Vietnam (59)
Chine (48)

Global distribution of French higher education abroad

Source: "L'enseignement supérieur par-delà les frontières: l'urgence d'une stratégie," *France Stratégie*, 2016.



EXTEND THE REACH OF FRENCH UNIVERSITIES AND SCHOOLS

At a time when demand for higher education is exploding around the world, meeting the need for training requires more than opening university doors to the world’s students. One must also **build**, in partnership with local actors, an **array of French postsecondary programs abroad**, which will have the ancillary effect of strengthening the appeal of French higher education.

In his speech of 20 March 2018 on the role of the French language, President Macron set a clear target: **to double the number of students who benefit from a French program abroad**.

France’s policy therefore envisages **two complementary objectives**:

- **To increase the influence of French higher education** by expanding the educational capacity of institutions abroad
- **To complement and reinforce France’s policy of development assistance** by extending to young people in our partner countries the opportunity to participate in programs offered by French institutions without having to leave their own country, in the model of the Franco-Senegalese campus or the Franco-Tunisian University for Africa and the Mediterranean.

Universities and *grandes écoles* operating abroad are in fact the best **ambassadors** of our higher education system; their presence raises demand for study France. Reciprocally, increases in the number of international students hosted in France strengthens existing ties between French and foreign institutions and favors the emergence or more integrated local projects.

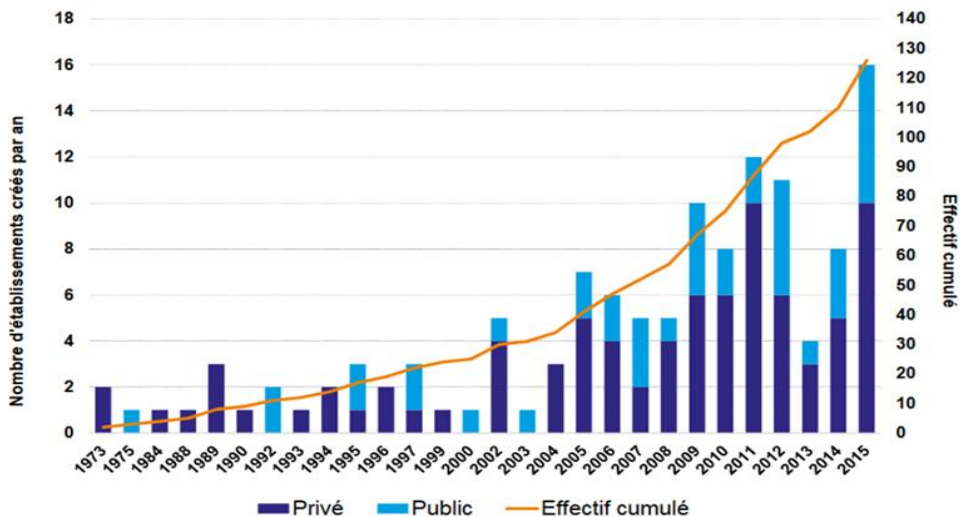
Three of the five countries where French institutions have the greatest presence (Morocco, Vietnam, China, Lebanon, and Tunisia) are among the **top 5 countries sending international students** to France. The bottom line is that projecting a presence abroad and welcoming students to France are not in conflict but rather are mutually reinforcing and complementary.

Expanding the reach of French universities and postsecondary schools abroad is an integral part of the **national recruiting strategy**: that strategy involves not only attracting students to higher education in France, but also **better projecting French higher education abroad**.

Our institutions already possess the **recognized capacity** to implement ambitious overseas projects in partnership with local academic actors.

Many *grandes écoles* have established campuses abroad—among them the Ecole Centrale in Beijing, ESSEC in Singapore and Rabat, and ESCP, with its 6 European locations. The **universities** have created numerous dual-degree programs in partnership with foreign counterparts that account for about a third of the students enrolled in French programs abroad. Growth in such overseas operations is a dynamic that the administration seeks to encourage.

Growth in the physical presence of French institutions of higher education



Source : France Stratégie, 2016

CHARACTERISTICS

OF FRENCH EDUCATIONAL PROGRAMS ABROAD

According to France Stratégie, French programs abroad reach **37,000** students, **5,700** through distance learning.

- 70% are in master-level programs.
- The universities account for about a third of enrollments.
- *Grandes écoles* have a strong presence: some 7,000 students are enrolled in schools of engineering and 3,000 in business schools.
- Management (40%) and engineering (36%) are the leading disciplines.
- Instruction is largely in French (69% of programs are taught entirely or partly in French; 57% exclusively).

More than **330** different remote degrees are offered, mostly by universities working through foreign partners.

Of the more than **600** French programs operating in 2014–15:

- 138 involved distance learning
- 140 had a physical presence, of which:
 - o 62 were franchises. *Most franchises involved specialized schools that offered institution-specific diplomas or professional/vocational certificates in disciplines where French expertise is renowned, such as fashion or restaurant and hotel management.*
 - o 40 were satellite campuses. *Most of these were extensions of schools of business (largely private) or engineering (EIGSI in Casablanca; École Centrale in Hyderabad and Casablanca). Exceptions included Université Paris Dauphine in Tunis and the Sorbonne in Abu Dhabi.*
 - o 38 involved partner institutions. *Under this model, French institutions deliver instruction within premises that are managed by a foreign partner institution or else built together with such an institution, an example being the Franco-Chinese Institutes.*

PLACE HIGHER EDUCATION AT THE CENTER OF OUR DEVELOPMENT ASSISTANCE POLICY

To accomplish this, it will be necessary, among other things, to **encourage the spread of French overseas campuses and to mainstream higher education in aid policies**. Specifically, this will involve eliciting and supporting projects involving the universities of the 19 countries identified as priorities in France's policy (Benin, Burkina Faso, Burundi, Central African Republic, Chad, Comoros, Democratic Republic of Congo, Djibouti, Ethiopia, Gambia, Guinea, Haiti, Liberia, Madagascar, Mali, Mauritania, Niger, Senegal, Chad, and Togo).

Several projects to this end – variously referred to as franco-foreign universities, franco-foreign campuses, offshore campuses, or regional hubs – are already in development in West and North Africa (Senegal, Côte d'Ivoire, Morocco, Tunisia). Groupings of French institutions in a single campus location, as in the case of Africa Sup in Morocco, the Franco-Senegalese campus, or the future Université Franco-Tunisienne de l'Afrique et de la Méditerranée (UFTAM), are excellent examples. **The goal is for these institutions to double their enrollments by 2022.**

Such projects need not take the form of integrated physical campuses in every instance. Dual-degree programs and distance-learning models also have proven value. But the campus projects all share the advantage of leading to a French national diploma recognized throughout the European higher education area.

TWO NEW TOOLS

To reach its objectives, the national recruitment strategy will rely on two new tools:

- **A seed fund of €5 million** will be established in 2019 by the Ministry of Europe and Foreign Affairs for the purpose of supporting education projects devised and developed jointly by French and foreign institutions, taking into account the needs of the societies and labor markets in the partner countries.
- **A support fund endowed with €20 million annually beginning in 2020** will be established by AFD, the French development agency, to help projects ramp up. The support fund will take over where the seed fund leaves off, lending multiyear financial credibility to the institutions and alliances of institutions involved in the projects.

Beyond this specific effort, AFD will stand ready to finance, where pertinent, the physical facilities required by the new franco-foreign campuses.

THE FRANCO-SENEGALESE CAMPUS

On the occasion of his visit to Senegal in February 2018, President Macron expressed the wish that France and Senegal should join forces to establish a Franco-Senegalese Campus. On 16 November, the ministers of higher education of the two countries signed a joint declaration laying out the first steps in building the campus: **located in the new city of Diamniadio**, the campus will offer 17 educational programs in the fields of **agronomy** and **food science**, **digital technology**, capacity building, **training of trainers**, and the **service sector**. In total, 8 French institutions and 12 Senegalese institutions will participate in offering these programs. The new campus will welcome its first faculty and students in fall 2019.

#6 LAUNCH A GLOBAL COMMUNICATION CAMPAIGN

To advance the **Choose France** strategy, the government will conduct a global communications campaign beginning in 2019. The objective will be to maintain France's appeal among its current partner countries and to raise awareness about study in France in others where French education remains little known. The challenge will be to **provoke interest among those who consider France as a possible study destination** so that they actually decide to come. Managed by Campus France with support from France's diplomatic network, the multimedia, multichannel campaign will drive home a single message: Choose France.

The campaign will emphasize:

GEOGRAPHIC TARGETING

Three major areas stand out: **the French-speaking world**; **large emerging countries**, particularly in Asia; and **Africa's English-speaking countries**. Without ignoring traditional sources of incoming mobility (North Africa, West Africa), the communications campaign will focus more on emerging countries (China, India, Vietnam, Indonesia) and the non-French-speaking countries of Sub-Saharan Africa, where the potential is great but awareness and knowledge of France is spotty. In sum, the countries identified are China, India, Russia, Brazil, the Middle East, English-speaking Africa (Ghana, Nigeria, Kenya, Ethiopia), and the large French-speaking countries (Morocco, Algeria, Tunisia, Senegal, Côte d'Ivoire, and the DRC).

GRADUATE-LEVEL MOBILITY (MASTER AND DOCTORATE)

The campaign will focus on students seeking to enroll in a master's or doctoral program in France, without neglecting high-school seniors and graduates, especially in fields where undergraduate programs taught in English already exist (business, political science). But international mobility is stronger (because more globalized) at the graduate level.

DIGITAL TOOLS

To reach young audiences around the world, the campaign will feature posters, videos, and purchases of media space, all adapted to local usages. Most important of all, it will rely on digital tools and social networks. It will be implemented, adapted, and amplified by Campus France's many offices abroad, but also by local opinion leaders and agents of influence (alumni of French postsecondary programs, lovers of France, and personalities with substantial youth followings) who can make the case for studying in France. This aspect is particularly important, because the decision is often triggered by a recommendation from friends or alumni of programs in France.

**OBJECTIVE: 500,000
INTERNATIONAL STUDENTS BY 2027**

#1 SIMPLIFY

VISA POLICIES

Give priority to international students

Institute single window and paperless, virtual procedures

Introduce new residency permit valid for return after graduation



#2 DOUBLE THE NUMBER OF

STUDENTS IN FRENCH & ENGLISH

Raise number of students learning French as a foreign language

Teach more courses in English after removing current legal roadblocks



#3 CREATE A LABEL OF

QUALITY IN SUPPORT SERVICES

Bring support services up to the highest international standards

Introduce a new label that will be recognized around the world: "Bienvenue en France"



#4 DIFFERENTIATE TUITION RATES

AND TRIPLE SCHOLARSHIPS

For greater equity, set tuition charges for students from outside the EEA to a third of the real cost of education

Increase exemptions
Triple scholarships



#5 EXPAND

OUR PRESENCE ABROAD

Raise capacity to offer educational programs abroad

Strengthen France's development assistance policy by mainstreaming higher education



#6 LAUNCH

A GLOBAL CAMPAIGN...

... in 2019, to be managed by Campus France

Stimulate interest in coming to France to study



**CHOOSE
FRANCE**