

KEY FIGURES

FEBRUARY 2020



5,300,000

internationally mobile students
around the world



EUROPE

#1

host
region



358,000

foreign students
in France



1

STUDENT MOBILITY WORLDWIDE

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STUDENT MOBILITY IN FRANCE

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FOREWORD

Welcome to France!

International student mobility continues to grow, having reached **a historic high point**: In 2017, **5.3 million students were enrolled in a degree program** after crossing a border (**up 71% over 10 years**). Studying outside one's country of origin, whether by choice or by necessity, is increasingly common, although it still involves **a minority of all students (2.4% in 2017)**.

In today's ever more connected world, student mobility remains sensitive to global trends, both political and economic. **Several of the largest host countries are experiencing a variety of serious uncertainties**: ecological and health crises, the unpredictability of Brexit's consequences in the United Kingdom, the direction of immigration policy in the United States, and influxes of refugees from countries at war, among others. The ranks of the sending countries are changing as well. Growth slowed in the numbers of students choosing the United States or the United Kingdom (up just 1% from the previous year). Third-ranking Australia (up 14%) and seventh-ranking Canada (up 11%) appeared to be the beneficiaries, thanks to their positive image abroad, though the effect of the fires in Australia in late 2019 has yet to show up in the figures.

In this context, the European Union, already the top host region in the world (even without counting the United Kingdom), is in a position to exploit several key advantages—among them an ancient university tradition, a calm and secure environment, high-level research, strong mobility programs, and plentiful professional opportunities.

To consolidate its position, the EU is building on the success of the Erasmus+ program; it also benefits from national strategies favorable to the **internationalization of higher education**, particularly in France and Germany.

Located in the heart of Europe, **France** is also one of the top hosts of mobile students, even after **dropping two places in the ranking since 2011**. In 2017, it ranked fifth, after Australia and, most recently, Germany. Although it trails Germany by only 500 students, the drop does reflect the fact that its numbers grew less slowly than those of the fastest-growing competitors (Australia, China, Russia, and Turkey, among others). As a group, Turkey, Saudi Arabia, the United Arab Emirates, and Malaysia attract even more African students than does France.

With its “Bienvenue en France” strategy—and the emphasis placed on the internationalization of institutions, services for foreign students, and communication—France reaffirms its standing and its **determination to offer the best possible services for international students**, while simultaneously highlighting the quality of its academic programs. **Programs taught in English** are more and more common (numbering 1,600 in 2019). In the context of a general decline in enrollment in French doctoral programs, the number and share of international candidates for **doctorates in scientific fields** rose in the five years ending in 2017, notably among students from China, Lebanon, and India.

France is also expanding the offerings of its educational institutions abroad in the form of new **overseas campuses and joint programs**, particularly in Africa (Tunisia, Senegal, Côte d'Ivoire). The Partnership for African Institutions, financed by the French development agency and with the cooperation of Campus France and France's national research agency, is designed to increase cooperation between French and African institutions and to offer academic programs tailored to local contexts, particularly the needs of the labor market.

In an increasingly competitive global academic environment, France has chosen to emphasize its strengths so as to attract more international students and complement its status as an academic powerhouse. Those are the overarching goals of the “Bienvenue en France” strategy.

Béatrice Khaiat,
Director-General, Campus France

5,300,000

**INTERNATIONAL STUDENTS
AROUND THE WORLD**



STUDENT MOBILITY WORLDWIDE

The world's international student population grew by 43% over the past 10 years, reaching 222 million in 2017. Half of those students are found in Asia-Oceania. Between now and 2027, the number is expected to exceed 300 million. In parallel with this growth, students are becoming increasingly mobile. The reasons for studying abroad vary by region of origin, but they include the search for excellence in education, the discovery of other cultures, family plans, and at home, underinvestment in education, the unavailability of certain programs, a shortage of space at universities, and economic and political instability. For all of these reasons and more, 5.3 million students (2.4% of the world's postsecondary students) crossed a national border to study in 2017, an increase of 71% from 10 years previous.

The host-country ranking is dominated by three English-speaking countries: the United States, the United Kingdom, and Australia. The United States alone is the destination of almost one in five mobile students. In 2017, Germany moved into fourth place by welcoming about 500 more international students than France.

China is the leading sending country, with a bit fewer than a million mobile students. India, though a distant second, is growing fast. Vietnam has assumed fifth place among sending countries, while Nigeria, where outbound mobility lost ground between 2016 and 2017, is now in eighth place.

The Erasmus+ program has been undeniably successful. In 2017, an additional 13,000 students completed an Erasmus+ mobility experience. All in all, 325,000 students left home to study in one of the program's 33 partner countries.

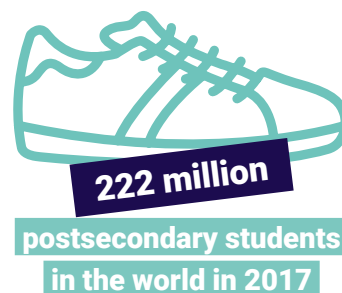
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STUDENT POPULATION

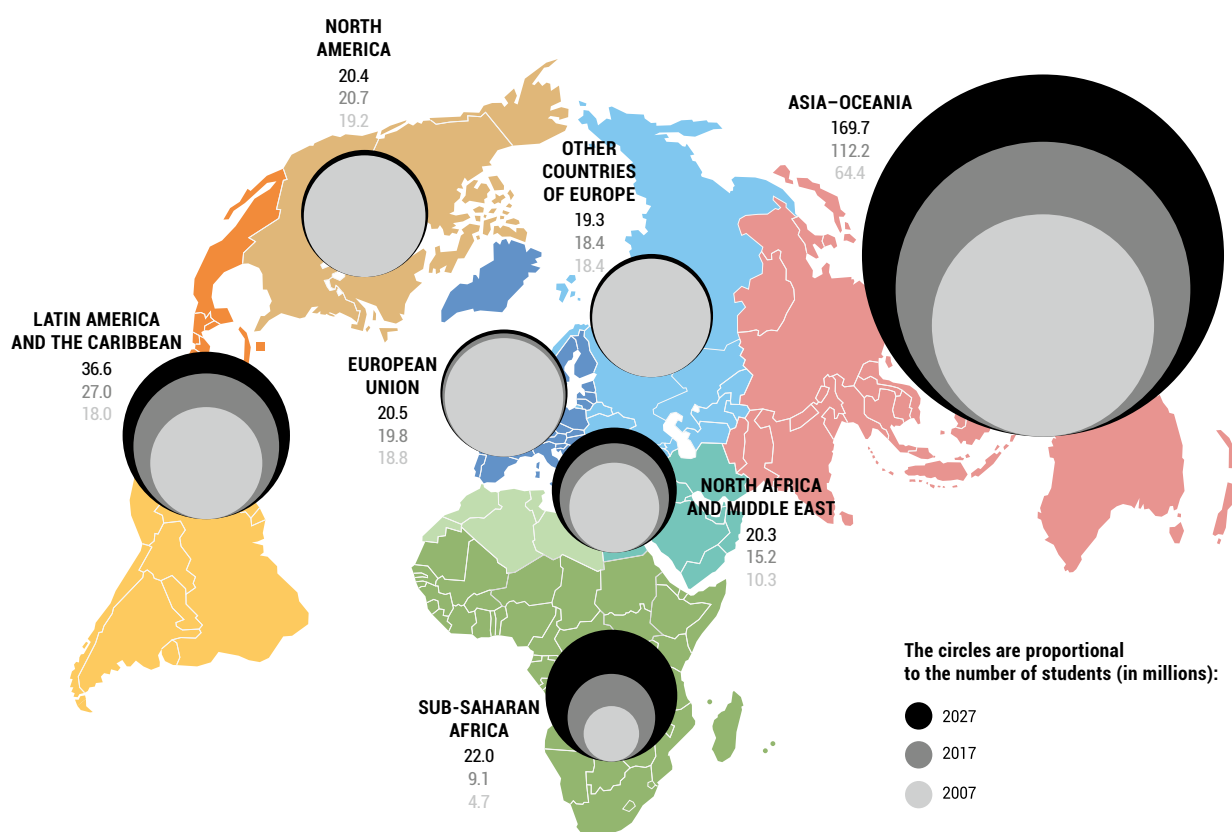
In 10 years, the number of the world's postsecondary students grew by 43%, rising to 222 million in 2017.

One of every two students lives in Asia-Oceania, 20% of them in China and 15% in India. Sub-Saharan Africa is the region that saw the fastest growth between 2007 and 2017, with its population of postsecondary students nearly doubling to 9 million.

The number of students should continue to grow at a steady rate over the next 10 years (+39%), **passing the 300 million mark by 2027.**



► Change in global population of postsecondary students, by region (2007-2027)

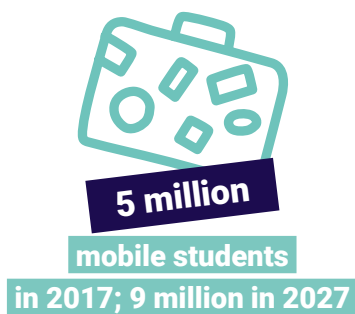


Source: UNESCO Institute for Statistics, January 2020.

The student population is concentrated in Asia-Oceania, and the concentration is set to increase (42% in 2007, 50% in 2017, and 55% in 2027). Likewise, but starting from a far smaller volume, Sub-Saharan Africa will move from 3% of the world's student population in 2007

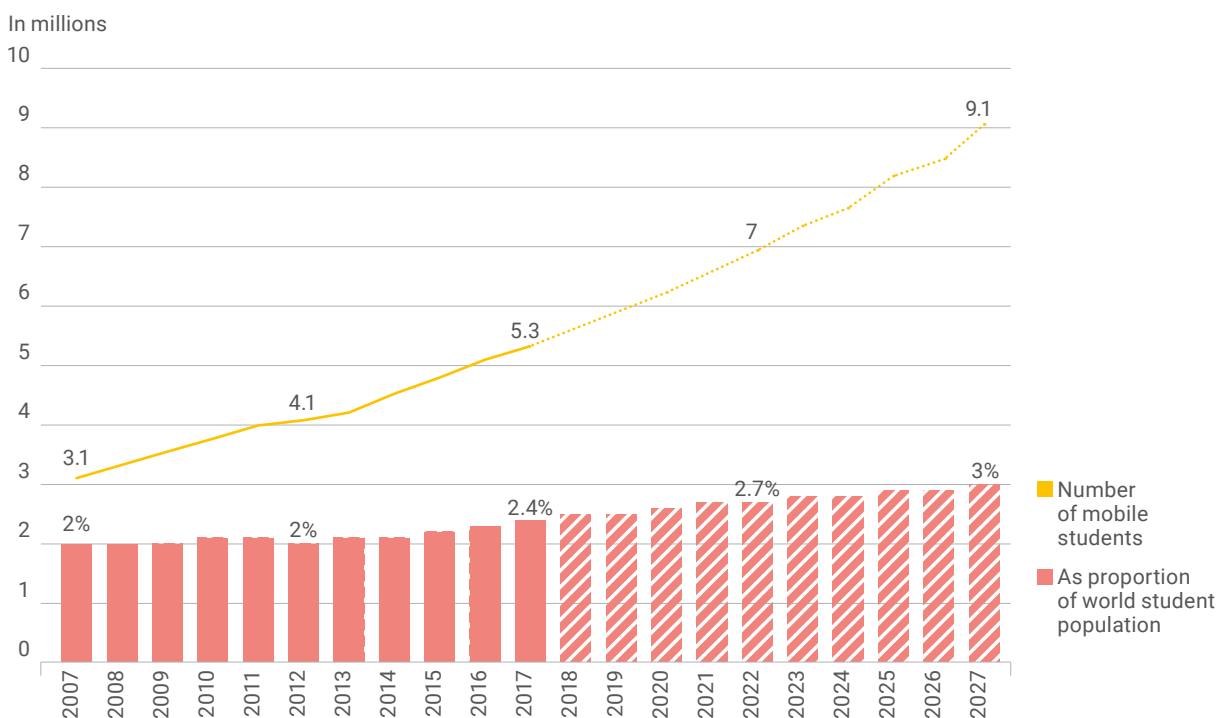
to 7% in 2027. The shares of Latin America and of the Middle East and North Africa (MENA) will hold steady at 12% and 7%, respectively. North America and Europe will have declining shares, even though their absolute numbers will increase.

STUDENT MOBILITY



The number of students who cross an international border in pursuit of a degree has risen steadily since UNESCO began counting them: **from just short of 2 million in 1998 to 5.3 million in 2017**. It is expected that this number will rise to 9 million by 2027.

► Change in student mobility (2007-2027)



Source: UNESCO Institute for Statistics (UIS), December 2019.

Note: Projections computed from UIS data. An annual growth rate of 5.5% is assumed for the period 2017 to 2027.

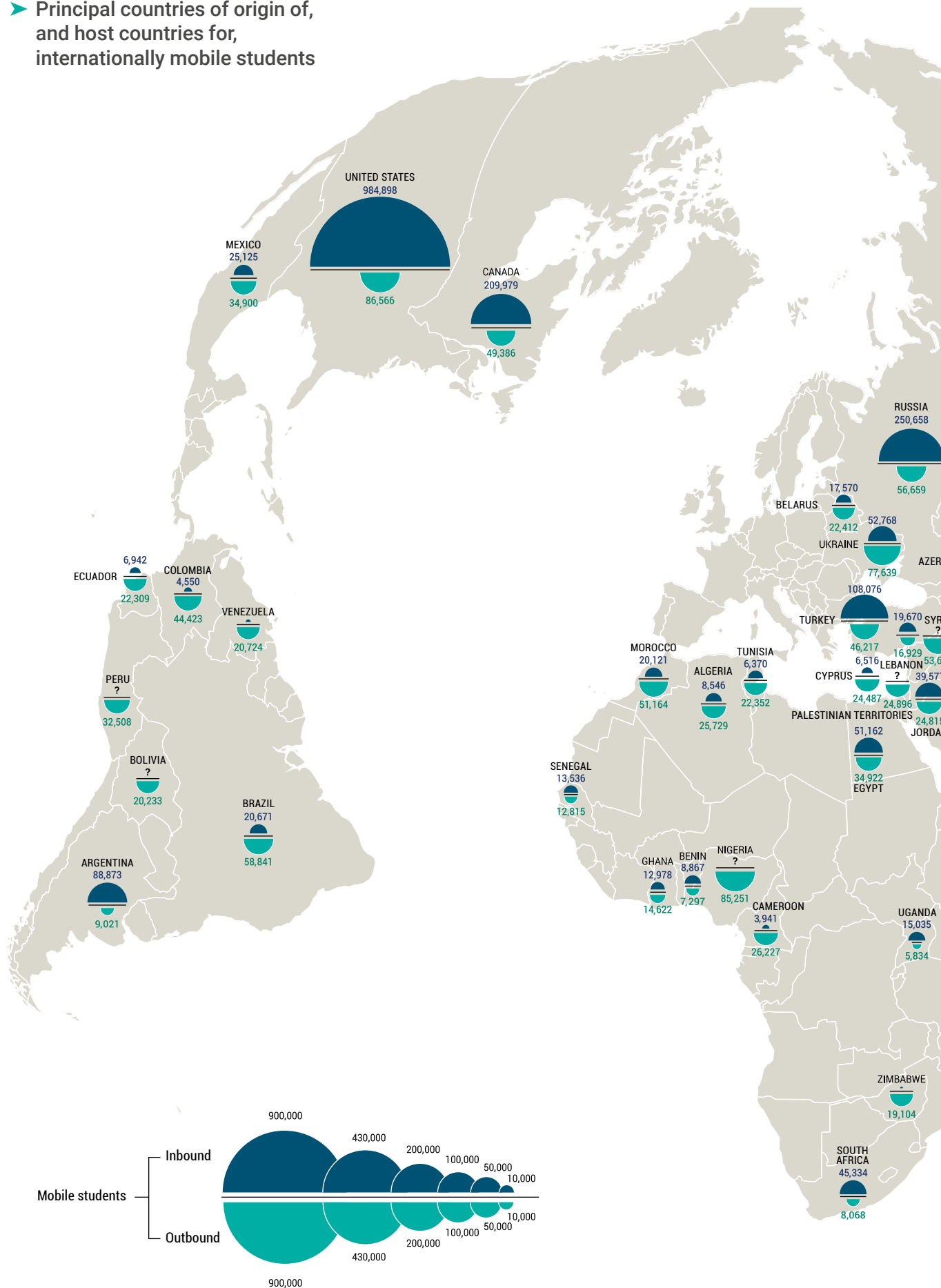
Between 2007 and 2017, the number of mobile students grew by 5.5% per year, faster than the world's student population (+3.8%/year). For this reason, the share of mobile students rose from 2% of the entire student population in 2007 to **2.4% in 2017**. It should reach 3% in 2027.

Definition

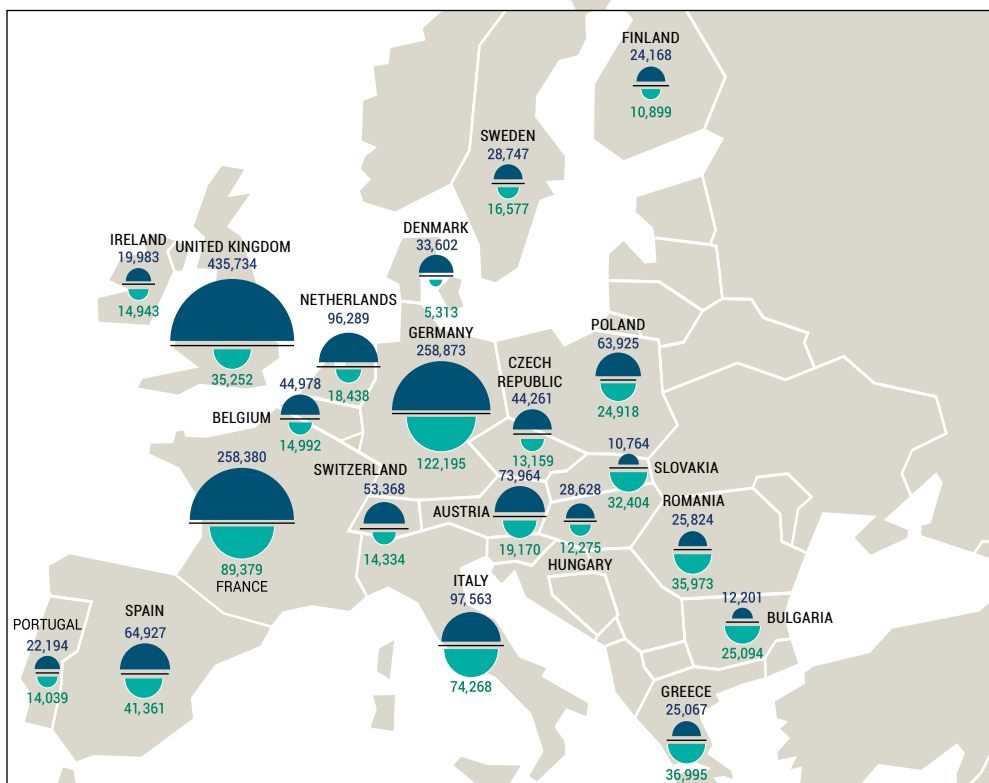
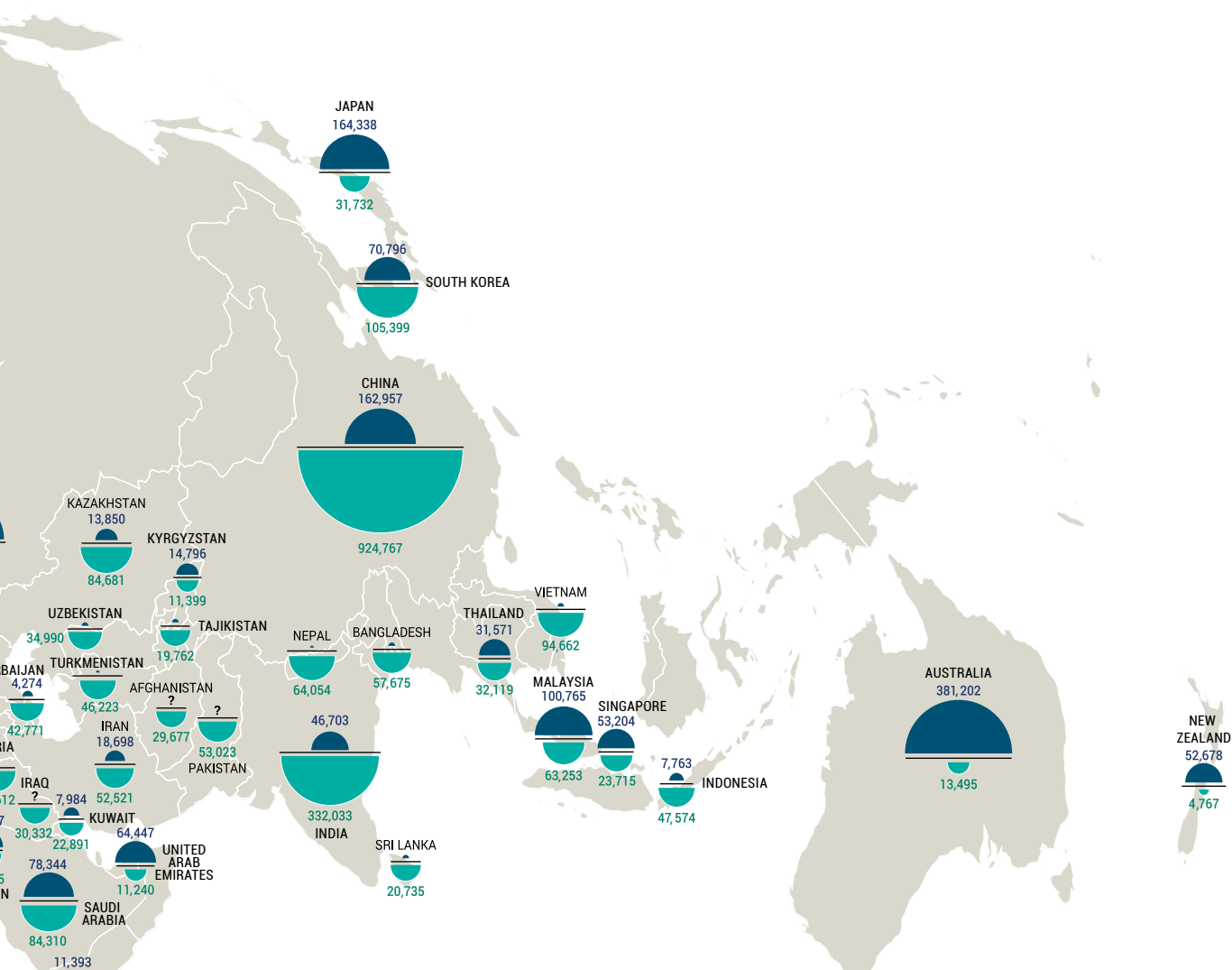
Internationally mobile student (UNESCO, OECD):

An internationally mobile student is one who crosses a border for the purpose of pursuing his or her studies and is enrolled in an educational program outside his or her country of origin. Only students enrolled in a **program leading to a degree** are counted.

► Principal countries of origin of, and host countries for, internationally mobile students



Source: UNESCO Institute for Statistics, January 2019.



INBOUND STUDENT MOBILITY

➤ Top 20 host countries for student mobility

Host country	International students hosted 2017	Change 2016-2017	Change 2012-2017	Rank	
				2012	2017
United States	984,898	+1%	+33%	1	1
United Kingdom	435,734	+1%	+2%	2	2
Australia	381,202	+14%	+53%	4	3
Germany	258,873	+6%	-	ND	4
France	258,380	+5%	+15%	3	5
Russia	250,658	+3%	+44%	6	6
Canada	209,979	+11%	+55%	8	7
Japan	164,338	+15%	+9%	7	8
China	162,957	+14%	+76%	9	9
Turkey	108,076	+23%	+180%	25	10
Malaysia	100,765	-19%	+79%	14	11
Italy	97,563	+5%	+26%	10	12
Netherlands	96,289	+7%	+67%	13	13
Argentina	88,873	+17%	-	ND	14
Saudi Arabia	78,344	-2%	+68%	18	15
Austria	73,964	+5%	+27%	12	16
South Korea	70,796	+14%	+19%	11	17
Spain	64,927	+30%	+16%	15	18
United Arab Emirates	64,447	-17%	+19%	16	19
Poland	63,925	+17%	+172%	31	20
Other countries	1,294,252	+1%	-3%	-	-
Total	5,309,240	4%	31%	-	-

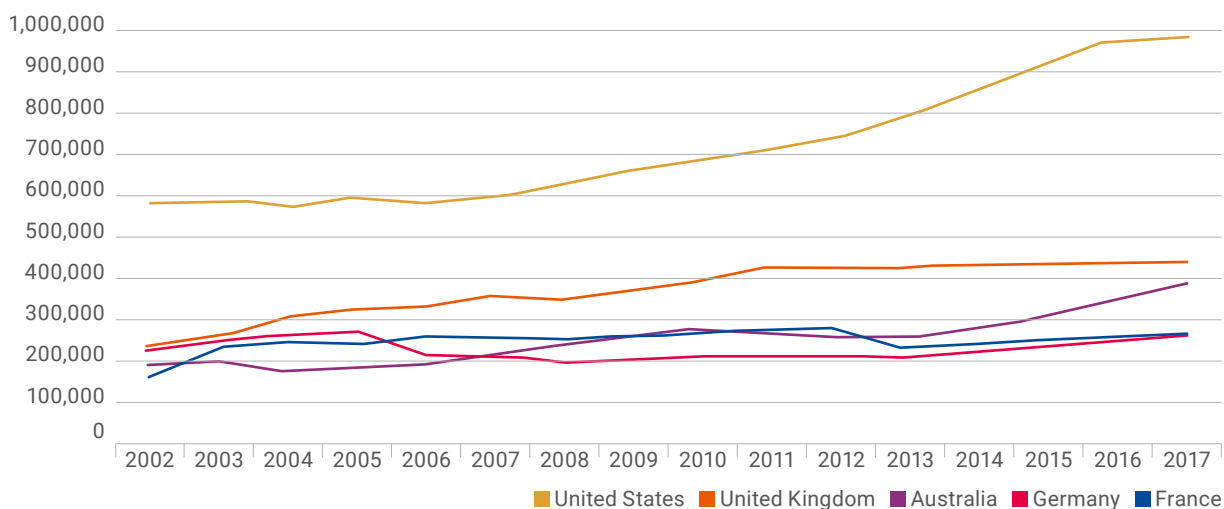
Source: UNESCO Institute for Statistics, December 2019.

UNCONTESTED LEADERS

The leaders in student mobility have not changed since UNESCO began collecting the relevant data (1998). Although the United States and the United Kingdom have held onto the two top slots, the rate of growth in

the number of inbound students has stabilized at about 1% per year. By contrast, Australia, which was in fifth place in 2003, may soon overtake the United Kingdom.

► Change in the numbers of students hosted by the top five destination countries



Source: UNESCO Institute for Statistics (UIS), January 2020.

Note: A change in the method of counting mobile students in 2013 explains the variations for that year observable in the data for France, Germany, and Australia. Because German data for before 2013 are no longer published, those in the graph come from earlier extractions obtained from the UIS website.

A CHANGE IN THE COUNTRIES THAT DRIVE STUDENT MOBILITY

Certain countries have seen a large increase in international enrollments in their institutions of higher education. Notably, Canada, China, and Turkey posted increases of 11% to 23% per year over the five years under study (2012-2017). **Argentina, Spain, and Poland have also seen strong growth in the number of students they host** (up 17% to 30% in a year). In recent years, these countries have put in place strategies to internationalize higher education. By contrast, Malaysia, a regional hub, is experiencing a significant drop in the number of students hosted, particularly from Bangladesh. Likewise, Belgium hosted many fewer international students in 2017 than in the year before (a drop of 26% in one year), in large part due to a drop in French, German, and

Romanian students related to changes in the procedures for admission to medical and allied health programs.

For the first time, Germany welcomed more international students than France to become the fourth-leading destination for students. The numbers of students received by the two countries remain very similar and grew at a similar rate from 2016 to 2017.

France slipped two places between 2012 and 2017. However, given the current international situation (restrictive immigration policies in the United States, Brexit in the United Kingdom, and nationalism in the Netherlands, among others), **the new strategy that France launched in 2018 should allow it to regain lost ground.**

CHANGES IN THE MIDDLE EAST

Saudi Arabia and the United Arab Emirates, which chalked up spectacular increases in prior years (partly owing to inflows of refugees from Syria and Iraq), **posted decreases in the number of students hosted** from 2016 to 2017 (-2% and -17%, respectively). While the slowdown remains modest in Saudi Arabia¹, it is more marked in

the case of the UAE, where inflows from several countries (India, Oman, Pakistan, Iran) have been slowing over the past few years. The drop in students from Iran (-30% in one year, -49% over five years) can be explained by the international political situation.

1. The slowdown is generalized. Inflows from all of Saudi Arabia's top 20 sending countries have either dropped or stagnated.

OUTBOUND STUDENT MOBILITY

➤ Top 20 countries of origin of internationally mobile degree-seeking students

Country	Number of students 2017	Change 2016-2017	Change 2012-2017	Rank	
				2012	2017
China	924,768	+7%	+32%	1	1
India	332,033	+9%	+73%	2	2
Germany	122,195	+3%	+3%	4	3
South Korea	105,399	0%	-13%	3	4
Vietnam	94,662	+15%	+76%	10	5
France	89,379	-2%	+39%	7	6
United States	86,566	+3%	+20%	5	7
Nigeria	85,251	-12%	+48%	9	8
Kazakhstan	84,681	-6%	+99%	17	9
Saudi Arabia	84,310	-7%	+30%	6	10
Ukraine	77,639	0%	+109%	21	11
Italy	74,268	+11%	+55%	13	12
Nepal	64,054	+30%	+118%	31	13
Malaysia	63,253	-3%	+6%	8	14
Brazil	58,841	+12%	+57%	20	15
Bangladesh	57,675	-6%	+150%	42	16
Russia	56,659	-1%	+11%	12	17
Syria	53,612	+15%	+186%	47	18
Pakistan	53,023	-1%	+41%	19	19
Iran	52,521	0%	+2%	11	20
Other countries	2,688,451	+4%	+23%	-	-
Total	5,309,240	+4%	+31%	-	-

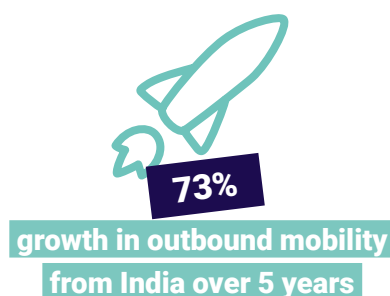
Source: UNESCO Institute for Statistics, December 2019.

ASIAN STUDENTS ARE INCREASINGLY MOBILE

Chinese and Indian students remain by far the largest contingents seeking a degree abroad. What's more, the number of internationally mobile students from these two countries is rising at a much faster rate (+7% and +9%, respectively, over a year) than the world average (+4%). Both countries are undergoing a **massive increase in postsecondary education**, with the rate of enrollment¹ rising from 21% to 49% in China between 2007 and 2017, and from 13% to 28% in India during the same period².

Though India still sends many fewer students abroad than does China, **its numbers rose much faster than China's over the five years under study** (+73% versus +33%). That trend should intensify in the coming years.

Other Asian countries, such as **Nepal (+30%)** and **Vietnam (+15%)** also saw growth in outbound mobility between 2016 and 2017. That growth propelled Vietnam to fifth place among sending countries³.



A FEW NATIONAL GROUPS WHOSE NUMBERS HAVE DWINDLED

Nigeria is moving in the other direction. It has posted a reduction in the number of mobile students⁴, a first for a country that until now had shown uninterrupted growth in outbound mobility. The change is probably due to the drop in the price of a barrel of oil. Indeed, a large share of mobile Nigerian students receive grants funded by hydrocarbon revenues.

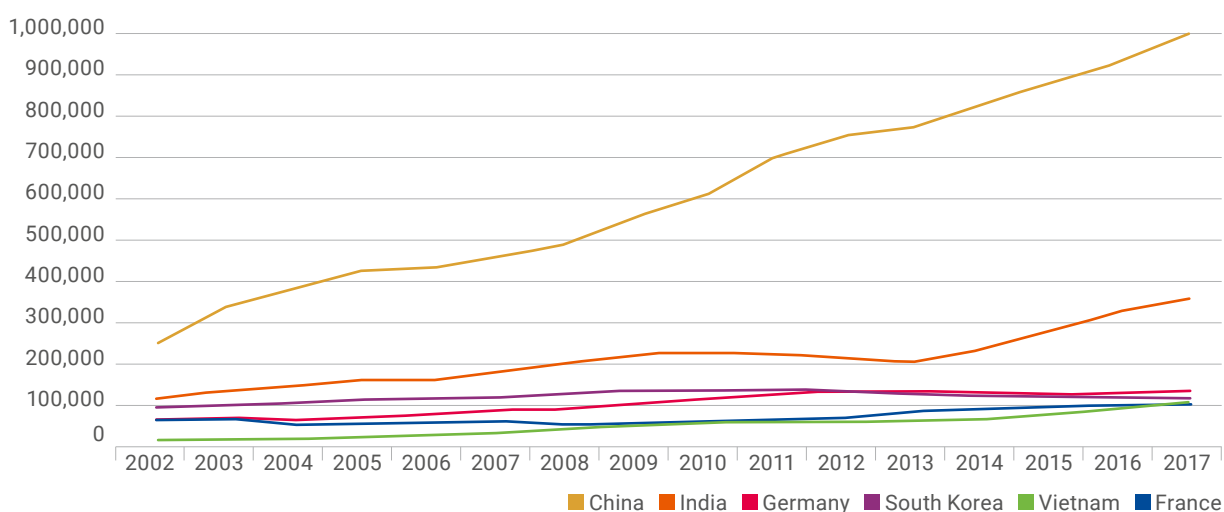
South Korea succeeded in stabilizing its mobility level between 2016 and 2017, after a decline of several years. The reasons for that decline included **the aging of the country's population and its economic difficulties**.

In the face of uncertain career prospects, more young South Koreans hesitate to spend time abroad for fear of losing touch with their networks at home.

France, whose outbound numbers increased over the five years under study, remains **the sixth-largest country of origin of internationally mobile students**. That said, there was a slight contraction of outbound students (-2%) between 2016 and 2017⁵.

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► Change in the number of outbound mobile students from leading sending countries



Source: UNESCO Institute for Statistics, December 2019.

1. Number of students of any age enrolled in higher education, expressed as a percentage of the university-age population.

2. UNESCO Institute for Statistics, January 2020.

3. Although the number of mobile Vietnamese students increased by 76% between 2012 and 2017, the number studying in France fell 19% during the same period.

4. For more information, see Dossier Nigeria, Dossier no. 49, Campus France, October 2019, https://ressources.campusfrance.org/publications/dossiers_pays/fr/dossier_49_fr.pdf.

5. Due to a significant drop in the number of French students in Belgium. For details on the mobility of French students, see pages 56 and 57.

REGIONAL MOBILITY TRENDS

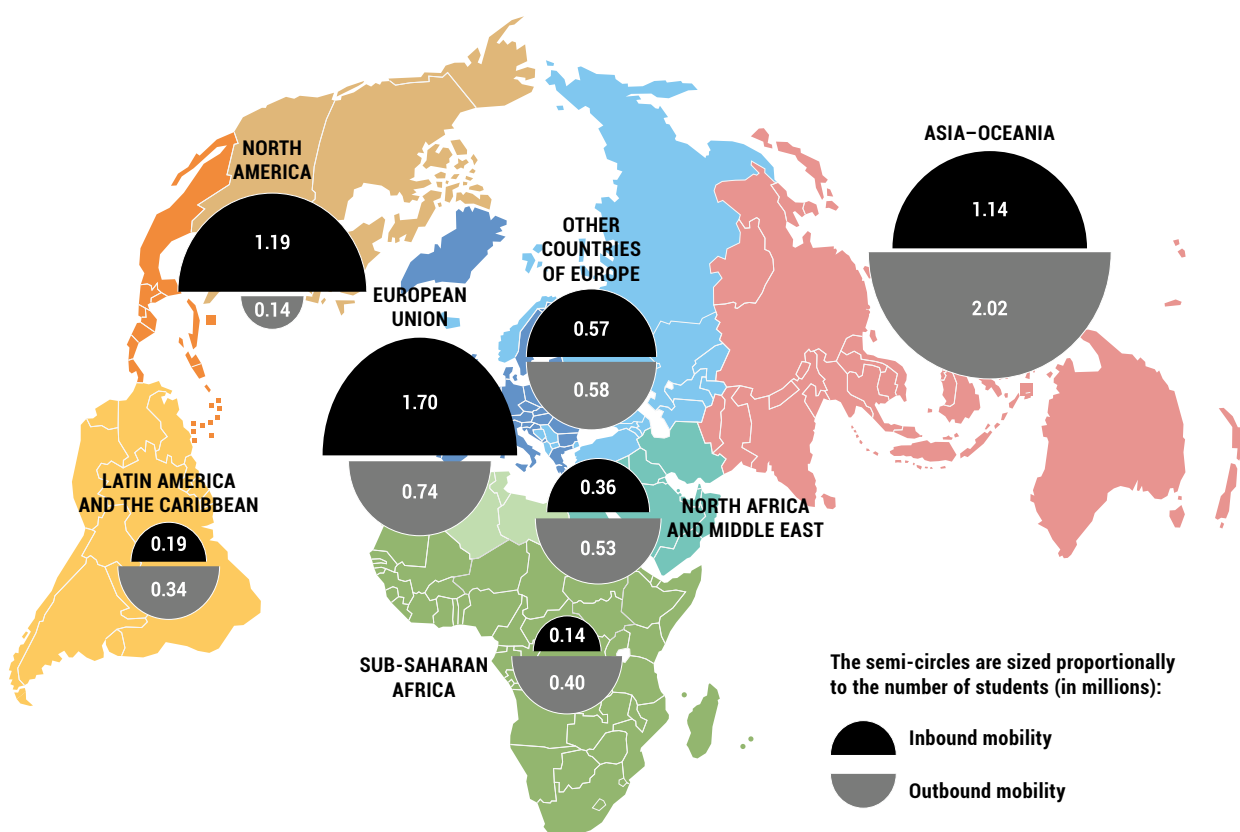
The European Union stands out as the leading host of international mobility, welcoming more than 1.7 million students in 2017, ahead of North America (1.2 million) and Asia-Oceania (1.1 million). **Europe and North America together account for two-thirds (65%) of inbound mobility**, while Latin America and the Caribbean receive less than 4% and Sub-Saharan Africa less than 3%. Some regions advanced more rapidly than others—for example, **non-EU Europe showed an increase of 57% in the number of international students** hosted between 2012 and 2017, in large part owing to Turkey's growing draw. By contrast, the EU's numbers grew by just 18% over the five years.


65%

of mobile students choose
Europe or North America

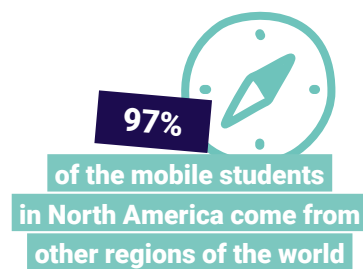
Nearly 40% of the world's mobile students come from **Asia-Oceania** (2 million), a leap of 37% between 2012 and 2017. **The EU is also a significant sending region, with 736,000 people studying in a country other than their own in 2017.** North America accounts for only 3% of global outbound mobility; its numbers increased slowly over the five years (+15%).

➤ Student mobility by geographic region



Source: UNESCO Institute for Statistics, January 2020.

Beyond the sheer volumes of inbound and outbound students, their origins and destinations offer a better understanding of regional mobility dynamics.



SIGNIFICANT EXTRAREGIONAL MOBILITY IN NORTH AMERICA AND MENA

Some countries tend more than others to receive students from outside their region. This is true particularly for **North America, where 97% of inbound international students come from other regions**; only 27% of mobile North American students move within their region.

The Middle East and North Africa shows the same pattern, with the exception of sizeable cross-border mobility to Iran and Jordan from within the region¹. These two countries take in high proportions of Syrian, Iraqi, and Palestinian students, owing to conflicts in those areas.

ASYMMETRIC MOBILITY PATTERNS IN SUB-SAHARAN AFRICA, LATIN AMERICA, AND ASIA-OCEANIA

Other regions exhibit unbalanced mobility flows. In the countries of Latin America, Sub-Saharan Africa, and Asia-Oceania, inbound students originate for the most part from the same region. By contrast, most outbound students choose a country outside their region. Thus, 67% of the inbound international students in **Sub-Saharan Africa** are intraregional, and 55% come from a country bordering their own, while **only 23% of the outwardly mobile African students enroll in another country within the region**.

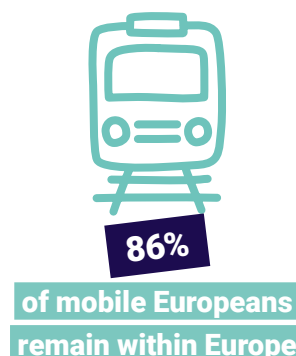
In Asia-Oceania, intraregional mobility accounts for 68% of inbound and 37% of outbound students. These figures should be treated with caution, however, since China does not report the nationality of the students it hosts. The gap is only a little less in **Latin America and the Caribbean**: 59% of inbound students come from within the region, compared with 32% of outbound students.

SUBSTANTIAL INTRAREGIONAL MOBILITY IN EUROPE

Europe stands out for its high level of intraregional student mobility, which is particularly apparent from the data on outbound mobility: **86% of outwardly mobile European students stay in Europe**. With respect to inbound mobility, only 50% of incoming students are European, which reflects the global draw of several host countries in the region (notably the United Kingdom, Germany, and France).

The share of student movement into bordering countries is 24% for all of the mobility inventoried by UNESCO in 2017, but that share rises to 45% for the countries of Europe, the highest of any world region.

Kazakhstan and Belarus show particularly high rates of mobility into a neighboring country (83% and 82% of their outbound mobility, respectively), owing to the pull of Russia². **Belgians (71%), Austrians (67%), and Germans (64%) are other nationalities that tend to choose a neighboring country for their study abroad**³.



1. Eighty-nine percent of the international students in Iran and 64% of those in Jordan are from a neighboring country.

2. The country groupings used in this publication are those of the French Ministry of Europe and Foreign Affairs as specified in the methodology, page 58.

3. The figure for French students is 59%. Outbound mobility of French students is analyzed on pages 56 and 57.

REGIONAL TRENDS: EUROPE

Student population¹: 38.2 million

Gross rate of enrollment in higher education: 71.7%

Inbound mobility: 2.1 million

Outbound mobility: 1.3 million



Europe's postsecondary student population amounts to 38 million, 17% of the world total. The number of European students was largely unchanged (-0.6%) between 2012 and 2017. It is expected to reach 40 million by 2027.

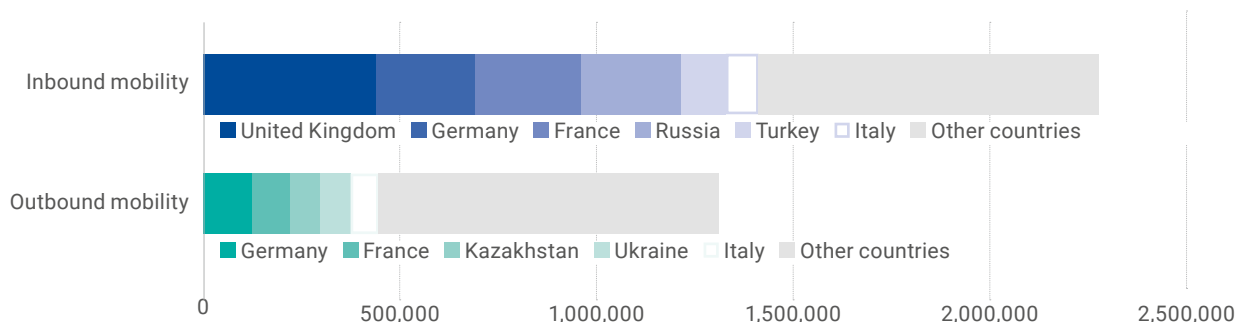
More than half (52%) of Europe's postsecondary students reside within the EU. The countries with the most students are Germany (3.1 million, up 24% between 2012 and 2017), France (2.5 million, up 10%), the United Kingdom (2.4 million, down 3%), and Spain (2 million, up 2%).

Outside the EU, students are concentrated in Russia (5.9 million) and Turkey (7.2 million). Student numbers in Turkey rose very rapidly (+65%) between 2012 and 2017.

Europe is the leading destination for mobile students seeking a degree. It includes three of the world's top five host countries (the United Kingdom, Germany, France) and 43% of mobile students. It is the region of origin of 24% of mobile students.

Large contingents of the European students who study abroad are from Germany (9% of outbound European students), France (7%), and Kazakhstan (7%). The region's fastest-growing countries in terms of outbound mobility are Ukraine, Azerbaijan, and Turkmenistan (up 133% to 163% between 2012 and 2017).

➤ Major sending and receiving countries in Europe



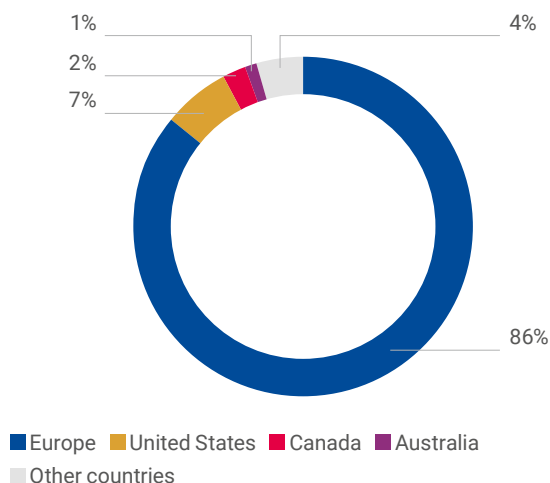
Source: UNESCO Institute for Statistics, January 2020.

Europe is characterized by a very high rate of internal mobility. The largest group of European students heads for Russia (15% of outbound mobility), which draws primarily from the countries of the former Soviet Union; in fact, 99% of European students who choose Russia

are from those countries. The United Kingdom (14%) draws the second-largest group, ahead of Germany (9%). Drawing 5% of mobile European students, France ranks fifth as a host of European students.

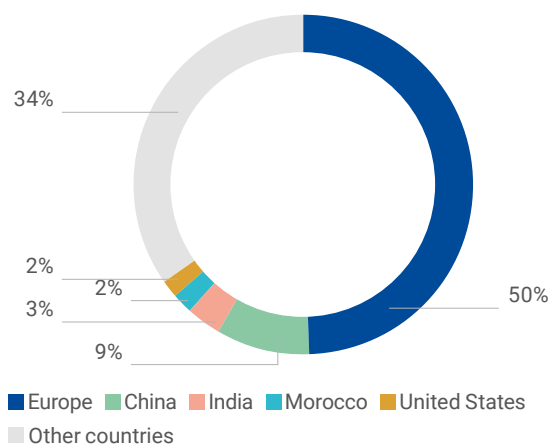
1. The data appearing in the boxes that introduce the regional subsections are drawn from UNESCO's Institute for Statistics. They pertain to the year 2017.

► Destinations of European students



Source: UNESCO Institute for Statistics, January 2020.

► Origins of international students studying in Europe



PRONOUNCED RATES OF INTERNATIONALIZATION

Among the European members of the OECD, **Switzerland has a very high number of international students as a share of higher education enrollments**. In 2017, it hosted 53,368 international students, most of whom came from the United Kingdom, Germany, France, and the United States. Unlike countries that see international students as a way of increasing university revenues, Switzerland has **adopted a strategy centered on research and “brain circulation.”** Tuition charges for international students are capped, and Swiss doctoral candidates are offered grants for outbound mobility².

With international students making up 10% of postsecondary enrollments, **France ranks eighth in Europe** on this measure. Germany is in twelfth place, with 8% of its student body being internationals.

► Major host countries for student mobility in Europe

Host country	Number of students hosted in 2017
United Kingdom	435,734
Germany	258,873
France	258,380
Russia	250,658
Turkey	108,076
Italy	97,563
Netherlands	96,289
Austria	73,964
Spain	64,927
Poland	63,925

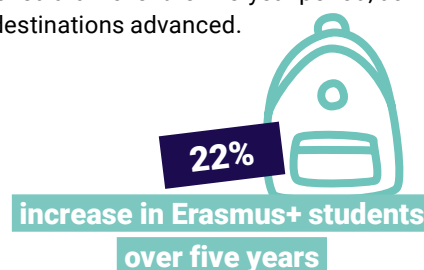
Source: UNESCO Institute for Statistics, January 2020.

2. <https://www.psl.eu/actualites/lattractivite-internationale-des-universites-une-perspective-europeenne>.

GROWING NUMBERS OF ERASMUS+ STUDENTS

In 2017, nearly 325,000 students benefitted from a mobility experience under the Erasmus+ program, the latest and greatest number in a steadily increasing trend (up 22% over five years). **Spain remains the leading study destination**, outpacing Germany, the United Kingdom, and France. But whereas the numbers for Germany and the United Kingdom were largely unchanged from 2016 to 2017 (-1% and 0% change, respectively), **the number of Erasmus+ students in France grew by 3%**. That rise

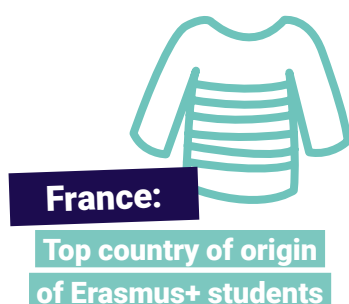
was not enough, however, to compensate for France's diminished draw over the five-year period, during which other destinations advanced.



➤ Top 5 host countries for Erasmus+ students

	Host country	Students hosted in 2017	Of which, interns (%)	Change 2012-2017	Change 2016-2017
1	Spain	49,692	30%	+24%	+5%
2	Germany	32,693	34%	+8%	-1%
3	United Kingdom	31,396	41%	+16%	0%
4	France	28,476	23%	-3%	+3%
5	Italy	26,704	23%	+34%	+6%
Total		325,495	-	+22%	+4%

Source: European Commission, January 2020.



France continues to be the leading source of Erasmus+ students, ranking ahead of Germany and Spain. Within the context of an overall increase in the number of Erasmus+ students, all of the major sending countries raised their numbers, except for Spain, which showed no increase from 2016 to 2017 and only a modest increase (2%) over the five years under study. France is the origin of the largest share of Erasmus+ interns (more than one in three).

➤ Top 5 countries of origin of Erasmus+ students

	Host country	Students hosted in 2017	Of which, interns (%)	Change 2012-2017	Change 2016-2017
1	France	47,589	36%	+35%	+9%
2	Germany	41,971	21%	+20%	+3%
3	Spain	39,939	22%	+2%	0%
4	Italy	38,376	23%	+49%	+8%
5	Turkey	17,851	23%	+24%	+6%
Total		325,495	-	+21%	+4%

Source: European Commission, January 2020.

The largest share of student movements—in both directions—is between Spain and Italy. French students tend to choose Spain, the United Kingdom, and

Germany, in that order. Most of the Erasmus+ students who arrive in France come from Germany, Italy, and the United Kingdom.

UNITED KINGDOM: A HIGHER EDUCATION SYSTEM STRUGGLING

TO INCREASE ITS APPEAL

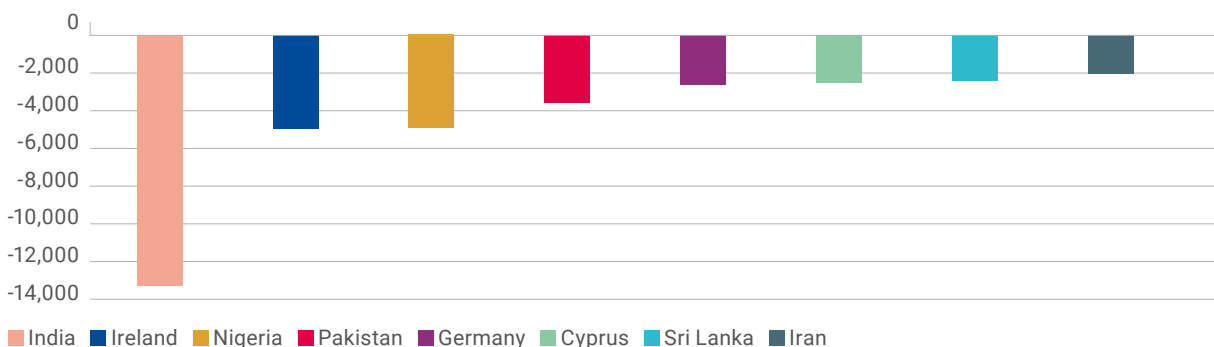
Historically, the United Kingdom has played a major role in international student mobility. But increasingly it appears to be losing ground. A visa policy that is unfavorable to students from certain major sending countries, combined with its withdrawal from the EU, begun in 2016, may explain the decline in its appeal.

In 2017, the United Kingdom hosted only 2% more foreign students than it did in 2012. Its numbers have grown more slowly than those of any other of the top twenty host countries. Its long-held position as the

leading destination after the United States is threatened by Australia, which has experienced spectacular growth (up 53% between 2012 and 2017).

Although it is still attracting more mobile Chinese students, **the United Kingdom is losing Indian students** (down 26% between 2012 and 2017), who make up the second-largest contingent of mobile students in the country. It is also losing Nigerian and Saudi students (-27% and -16%, respectively, during the same period).

➤ Major declines in international students enrolled in the United Kingdom, by country (2012-2017)

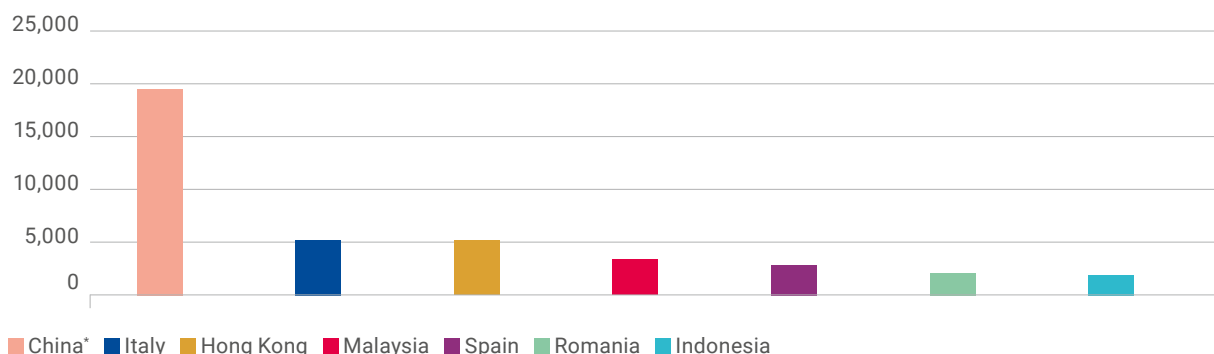


Source: UNESCO Institute for Statistics, January 2020.

For the time being, these losses are being offset by gains in the number of students from other countries, particularly in southern Europe (who have so far enjoyed tuition charges no higher than those paid by British

students): Italians (+62% between 2012 and 2017), Spaniards (+50%), and Portuguese (+55%). During the same period, the number of French students rose by just 14%, while the number of German students dropped 7%.

➤ Major increases in international students enrolled in the United Kingdom, by country (2012-2017)



Source: UNESCO Institute for Statistics, January 2020.

*Does not include data for Hong Kong and Macao.

8 times more
foreign students come to the U.K.
than British students leave it

The United Kingdom has the distinction of receiving eight times more internationally mobile students than it sends abroad. In fact, each year only about 35,000 British students leave home to seek a degree abroad. Their number is growing, however (up 33% between 2012 and 2017). More than 10,000 choose the United States, while the Netherlands, Germany, Australia, and France each host between 2,000 and 3,000.

GERMANY IS ATTRACTING GROWING NUMBERS OF ASIAN STUDENTS

Germany had a student population of 3 million in 2017, the EU's largest, and an increase of 24% in the five years leading up to 2017. That same year, **Germany welcomed close to 260,000 students**, making it the fourth-largest destination for international students.

The reasons behind Germany's advance are two: (i) **a massive influx of students from China and India**, with increases of 8,300 and 7,700 students, respectively, between 2013 and 2017¹, and (ii) an **ambitious policy of welcoming student refugees**. The number of Syrian students, who make up 78% of the students benefitting from German programs for refugees², nearly tripled during this period (for an increase of 2,800 students). That trend should continue to intensify, since, in 2018, there were more than 8,600 Syrian students in Germany (counting all forms of mobility), compared with just 5,100 the year before, an increase of 69%³.

The origins of international students in Germany are quite varied. Chinese students make up nearly 11% of the total; Indians, about 5%; and Austrians and Russians, about 4% each. These groups are followed by French, Cameroonian, and Italian students, at 3% each. Germany's drawing power rests on a **network of excellent universities** and a **proactive scholarship policy** managed by the German academic exchange service (DAAD). DAAD runs one of the largest scholarship programs in the world, with 145,188 grantees in 2018, including 63,680 inbound international students⁴. The extremely low rates of tuition (except in Baden-Württemberg⁵), the reputation of German engineering, and the employment prospects offered by the German economy (particularly in manufacturing) all help attract international students, **40% of whom are enrolled in engineering programs**⁶.



64,000 German scholarships
awarded to international
students in 2018⁷

Germany is also the third-ranking country for outbound mobility, with 122,000 of its citizens in other countries in 2017. But **64% of this mobility involves neighboring countries**. Nearly a third of mobile Germans choose Austria, 19% the Netherlands, and 9% Switzerland. In addition, many Germans choose the United Kingdom (13,000) or the United States (7,000).

RUSSIA AND THE COUNTRIES OF EASTERN AND CENTRAL EUROPE (ECE):

RENEWED DRAWING POWER AMID FLAGGING DEMOGRAPHICS

Russia and the ECE countries have undergone a sharp, prolonged drop in student numbers linked to a demographic crisis dating from the Soviet period that only became more serious after the dissolution of the USSR. Russia had 5.9 million students in 2017, just three-quarters of the number posted in 2012. Since

2015, the country no longer has Europe's largest student population. With 65% growth in five years, **Turkey, with 7.2 million students, has overtaken Russia.**

1. 2012 data for Germany are not available.

2. *Wissenschaft weltoffen, Daten und Fakten zur Internationalität von Studium und Forschung in Deutschland*, DAAD, 2019, p. 58.

3. *Ibid.*, p. 53.

4. *Research and study across borders*, DAAD, 2019.

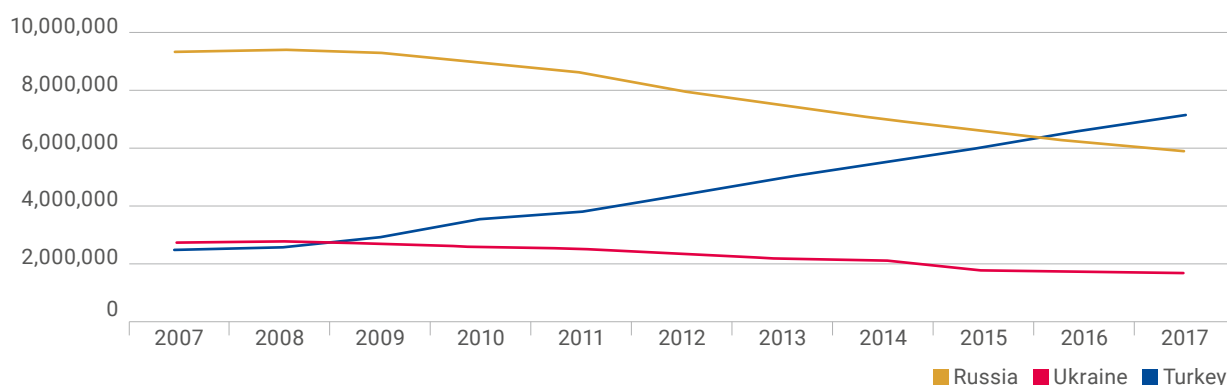
5. Tuition charges in the state are €1,500 per semester for non-EU students, by virtue of a measure implemented in 2017.

In Saxony, institutions are free to charge higher tuition rates to non-EU students as long as a scholarship program is put in place.

6. *Wissenschaft weltoffen*, op. cit., p. 48.

7. By way of comparison, France offered about 7,000 scholarship grants in the same year.

➤ Student population of Russia, Ukraine, and Turkey, 2007-2017



Source: UNESCO Institute for Statistics, January 2020.

One of the ECE countries with the largest student populations, Ukraine has lost 30% (1.7 million). **The ECE countries that have joined the EU have not been spared a similar fate**, with reductions of 23% for Poland (1.6 million), 24% for Romania (550,000), 20% for the Czech Republic (350,000), and 25% for Hungary (290,000). The pattern also extends to Central Asia: Kazakhstan lost 24% of its students (630,000) over the five years under study.

At the same time, **Russia and the ECE countries are drawing growing numbers of foreign students**. For example, Russia attracted 44% more international students in 2017 than in 2012, reaching 251,000 students. The same phenomenon occurred in Poland, which recorded a 172% increase (to 64,000 international students), and, to a lesser extent, in Ukraine (up 21% to 53,000). The three Baltic states saw their numbers double over the period, reaching a combined total of 16,000 international students. **The growth in numbers of inbound internationals, however, did not fully offset the rapid drop in the overall student population in these countries.**

Mobility in the ECE countries exhibits historical dynamics. Thus, **in Russia, about 70% of the volume of inbound students comes from the former USSR⁸**. The largest contingent (65,000) is from Kazakhstan, followed by Uzbekistan (21,000), Turkmenistan (17,000), and Ukraine (15,000). By contrast, Russia's attraction for students from the former "people's republics" (Poland, Czech Republic, Hungary) is today almost nonexistent, a fact that may be explained by the emergence of a generation of young people more inclined to speak English than Russian and by the accentuated draw of Western Europe.

In Poland, almost 71% of inbound mobility comes from the former USSR and the Eastern bloc. Ukrainian students alone make up more than half of Poland's inbound mobility (35,000). Their numbers increased five-fold between 2012 and 2017. The origins of the 53,000 international students hosted by Ukraine are more diverse, though 45% of them come from the former USSR and the Eastern bloc.



8. Cf. *Dossier Russie*, Dossier no. 42, Campus France, September 2018.

REGIONAL TRENDS: THE AMERICAS

Student population: 47.7 million

Gross rate of enrollment in higher education: 71.3%

Inbound mobility: 447,000

Outbound mobility: 1.3 million

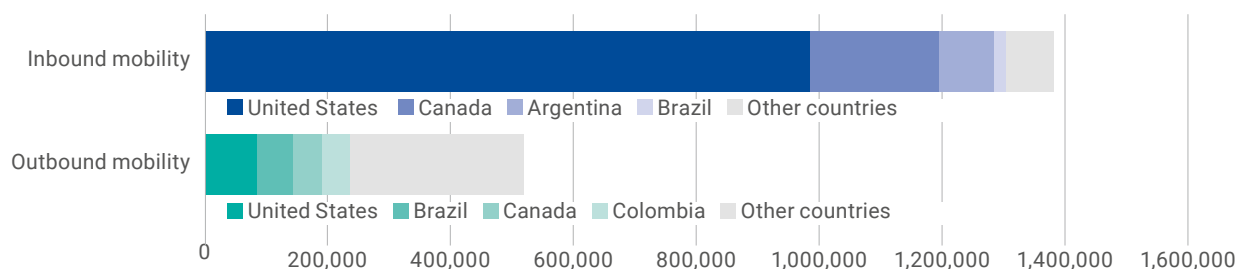
The postsecondary student population in the Americas numbered nearly 48 million in 2017, making up 21% of the world's total. In 2007, Latin America and the Caribbean had fewer students than North America, but by 2017 the reverse was true: in 2017, Latin America had 27 million postsecondary students to North America's 21 million.

The South American subcontinent shows a trend opposite that of North America, with its student population accounting for 39% of the regional total in 2012 and 43% in 2017.

Hosting more than 1.3 million mobile students in 2017, the Americas are the second-largest host region, trailing Europe but leading Asia-Oceania. North America stands apart: 89% of the students coming to the Americas choose the United States or Canada, whereas just 9% head for South America and 2% for Central America or the Caribbean.

In terms of outbound mobility, the Americas are only the fourth-largest source of mobile students, sending fewer than 500,000 students abroad. The breakdown of the region's outbound students differs from that of its inbound students: 52% of the region's outbound students come from South America, 29% from North America, and 19% from Central America and the Caribbean. Outbound U.S. students outnumber those of all other nations in the region, making up 18% of its outbound mobility. Behind the United States are Brazil (13%) and Canada (11%).

➤ Major sending and receiving countries in the Americas

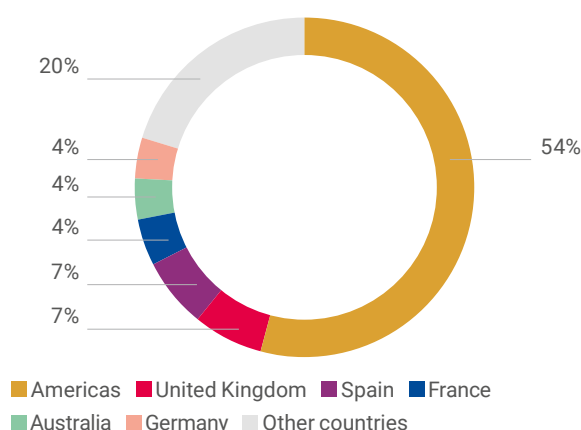


Source: UNESCO Institute for Statistics, January 2020.

Fifty-four percent of mobile students from the Americas remain in the region, helping to make it the world region with the second-largest rate of internal mobility, after Europe. North America, in particular, is favored by

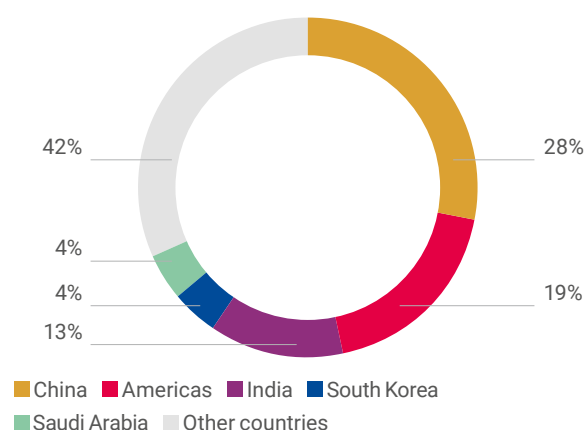
students from the Americas; the United States and Canada are the leading destinations of students from the region who elect to stay in the region.

➤ Destinations of mobile students from the Americas



Source: UNESCO Institute for Statistics, January 2020.

➤ Origins of mobile students hosted in the Americas



THE UNITED STATES:

UNCHALLENGED LEADER

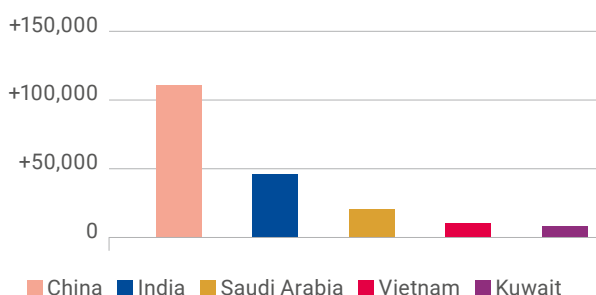
IN DRAWING MOBILE STUDENTS

In the two decades that UNESCO has gathered data on worldwide student mobility, the United States has been **the leading host of degree-seeking mobile students. Today, the country attracts about a million students.** Although the United States has dominated the rankings and remains far ahead of second-placed United Kingdom, **the rate of growth in the number of students coming to the country suddenly slowed in 2017** from 2016 (-1%). Nevertheless, the overall number grew 33% during the five years under study.



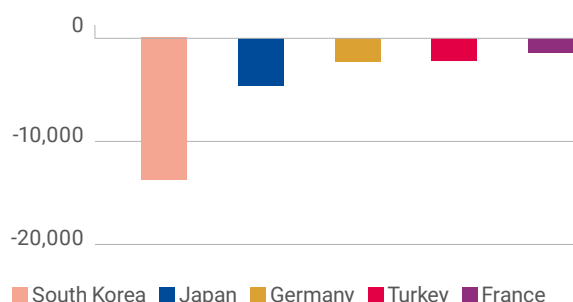
33%
of the international students
in the United States are Chinese;
14% are Indian

➤ Largest increases in the number of international students in the United States, by nationality (2012-2017)



Source: UNESCO Institute for Statistics, January 2020.

➤ Largest decreases in the number of international students in the United States, by nationality (2012-2017)



Source: UNESCO Institute for Statistics, January 2020.

Thanks to the growth of the two largest groups of students, Chinese (up 4% over one year) and Indian (up 5%), the United States maintained a positive rate of growth in the number of incoming international students between 2016 and 2017. These two nationalities together make up almost half (47%) of the international students in the country. Flows from South Korea and Saudi Arabia, the third- and fourth-largest sources of students, show a different pattern. Their numbers dropped by 7% and 6%, respectively, over the year.

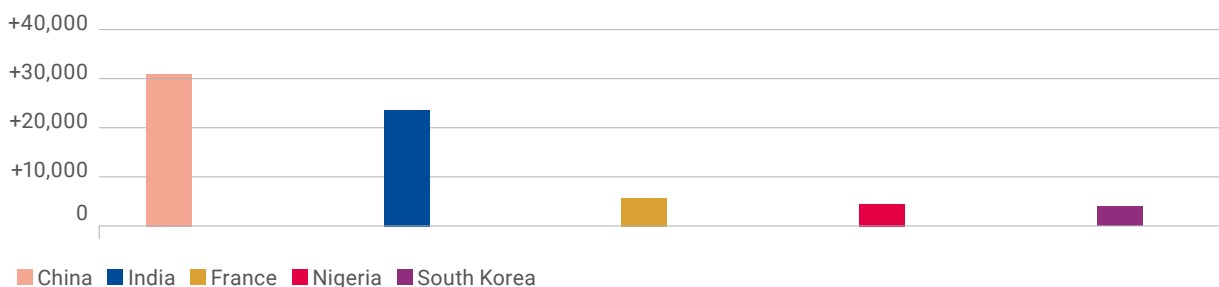
While the country's population of postsecondary students has shrunk (-3% over three years), the number of outwardly mobile U.S. students has grown (+11%), reaching 86,500 in 2017. They favor the United Kingdom (19%), Mexico (13%), and Canada (10%) as destinations. Despite that growth, the United States remains predominantly a host country, receiving **11 times more inbound degree-seekers than it sends abroad.**

CANADA'S GROWING APPEAL

A major player in worldwide student mobility, Canada is attracting growing numbers of international students. Their number has risen rapidly, swelling by 55% between 2012 and 2017 to reach **nearly 210,000 foreign nationals earning their degree in the country**. Canada enjoys a very positive image in many countries, and its rate of growth in student recruitment is significantly higher than that of the United States.

As in the United States, **Chinese and Indian students are the largest components of Canada's international student mix**, together making up 47% of the mobile international students in the country. The Canadian government is seeking to diversify the origins of students coming to the country. **France is the third-most-common country of origin of inbound students**. The number of French students studying in Canada rose 64% between 2012 and 2017. Most of them choose Quebec, whose universities promote themselves heavily in France.

➤ Largest increases in student mobility to Canada, by country (2012-2017)

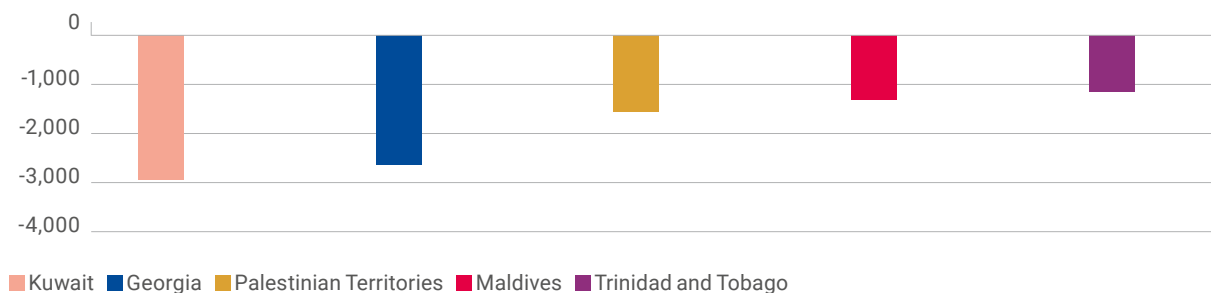


Source: UNESCO Institute for Statistics, January 2020.

The numbers of students from Asian countries are rising fast. Three of the five countries that showed the greatest increases between 2012 and 2017 are Asian. By contrast, the student groups that have shrunk the most are in the Middle East (Kuwait, Palestinian Territories).

In 2019, the Canadian government set in motion a new national strategy that has as one of its main goals the encouragement of outbound mobility¹. The number of outbound Canadians indeed increased only slowly between 2012 and 2017 (+7%). More than half of the Canadian students who study abroad do so in the United States (56%), while a quarter of them choose an EU country and 10% go to Asia-Oceania (half to Australia).

➤ Largest decreases in student mobility to Canada, by country (2012-2017)



Source: UNESCO Institute for Statistics, January 2020.

1. The second major objective is to increase the diversity of international student recruitment. <https://monitor.icef.com/2019/08/canada-new-international-education-strategy-focuses-on-diversification-and-outbound-mobility/>.

LATIN AMERICA AND THE CARIBBEAN: HIGHER EDUCATION SYSTEMS

IN THE MIDST OF INTERNATIONALIZATION

The countries of Latin America and the Caribbean (LAC) have a combined student population of 21 million—12% of the global population. The region's gross rate of enrollment in higher education is 58%. The pool of postsecondary students is growing fast (up 18% between 2012 and 2017).

Student mobility is not always easy to measure in the region because some countries have statistical deficiencies or do not submit data. The figures presented here must therefore be treated with caution.

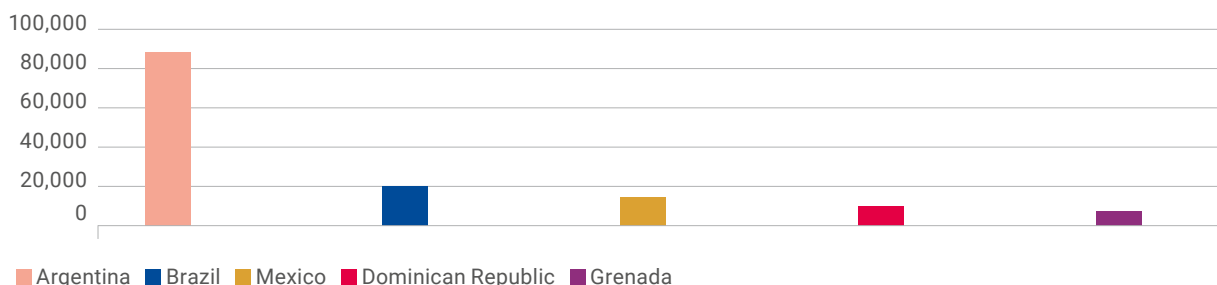
Higher education in the region is internationalizing. **The number of LAC students participating in outbound mobility grew by 58% between 2012 and 2017, while the number of inbound students rose 47%.**

The great majority (87%) of inbound students come from elsewhere in the Americas, contrasted with 5% from Europe and 4% from Sub-Saharan Africa.

A plurality of the mobile, degree-seeking students from the region choose Europe as their study destination (31%), particularly the EU (30%). Spain is the leading host (9%). Many LAC students also elect to study in North America (28%), while another 29% remain in the LAC region.

Argentina has emerged as a center of attraction for mobile degree-seekers in Latin America. The world's 14th-largest host nation, it drew 89,000 international students in 2017; 90% of that number came from elsewhere in the region.

► Number of international students in the major host countries of Latin America and the Caribbean

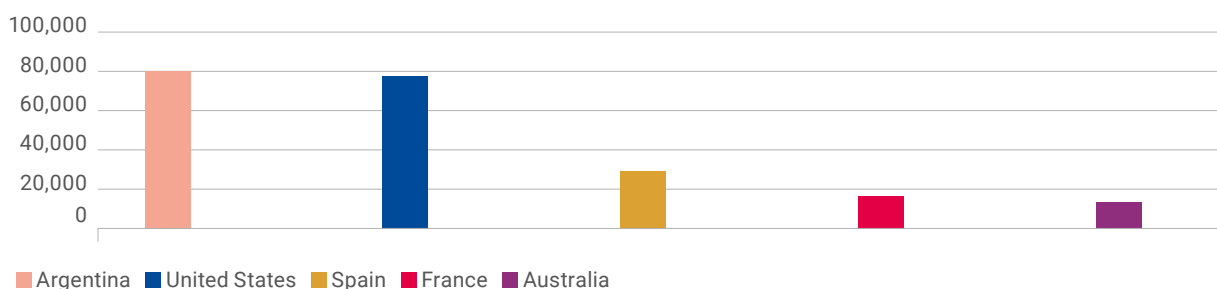


Source: UNESCO Institute for Statistics, January 2020.

The two top destinations for LAC students are in the Americas: Argentina and the United States. France ranks

fourth as a destination, after Spain, with its historical and linguistic ties to the region.

► Destinations of mobile LAC students in 2017



Source: UNESCO Institute for Statistics, January 2020.

REGIONAL TRENDS: ASIA-OCEANIA

Student population: 112 million

Gross rate of enrollment in higher education: 40.8%

Inbound mobility: 1.1 million

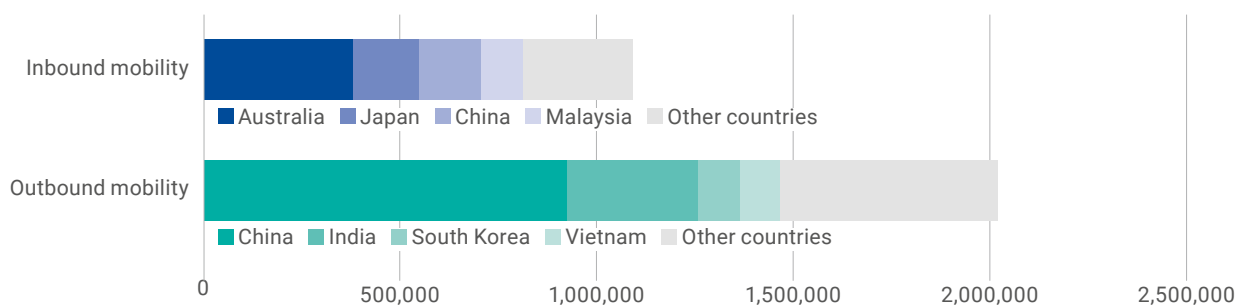
Outbound mobility: 2 million

The northern half of this vast region is continental, whereas its southern half consists of islands and archipelagos. Asia-Oceania contains **the top two sources of global outbound mobility (China and India), the fourth such source (South Korea), and the world's third-ranked host country (Australia)**. Thus large numbers of students flow into the region, while even larger numbers flow out, often traveling long distances as a result of the geographic location of their

countries and their own study preferences. **Thirty-eight percent of the world's outbound students come from Asia-Oceania, making it the largest source of mobile students.** The region sends out almost twice as many students as it takes in, a disparity that is all the more significant for the high volumes involved: **2 million outbound students vs. 1.1 million inbound.** **Two-thirds of the inbound students choose an English-speaking country:** one-third the United States and the second third Australia, the United Kingdom, Canada, or New Zealand.

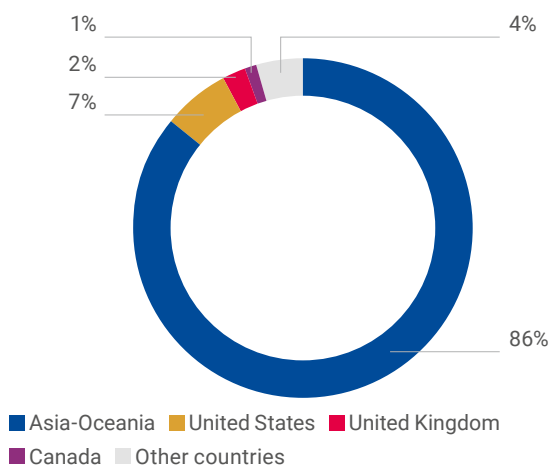
Thirty-seven percent of the region's outbound students opt for another country in the region¹. All but one of the region's countries having a major role in mobility is either primarily a sending country or primarily a receiving country. The exception is China. **China is the world's top sending country and its ninth-ranked receiving country.**

➤ Major sending and receiving countries in Asia-Oceania



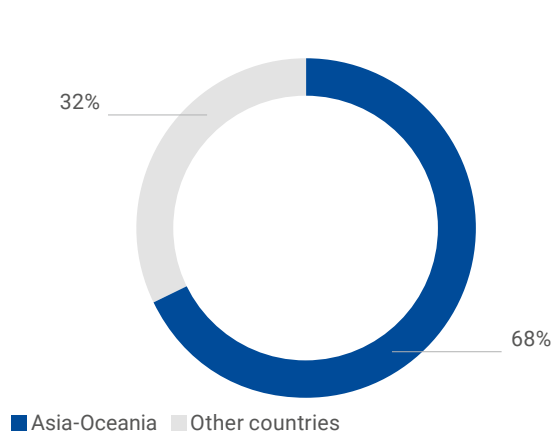
Source: UNESCO Institute for Statistics, January 2020.

➤ Destinations of internationally mobile students from Asia-Oceania



Source: UNESCO Institute for Statistics, January 2020.

➤ Origins of internationally mobile students from Asia-Oceania



1. This global percentage is slightly undervalued because of the absence of UNESCO data on the breakdown of inbound students in China.

AUSTRALIA: A VERY INTERNATIONALIZED SYSTEM OF HIGHER EDUCATION

Of the leading host countries, **Australia, ranked third, showed the most growth from 2016 to 2017 (+14%)**, confirming the trend of the five years under study. The number of students from China and India, who make up more than half of the international students in Australia, grew 14% between 2016 and 2017. But the fastest growth came from Nepal (+43% in one year), the third-ranked nation of origin, and South Korea (+37%), the eighth-ranked. With the exception of Brazil (ranked thirteenth), the top 15 nations of origin of international students in Australia are in Asia.

Australia's recruitment policy focuses on the large Asian countries that account for a consequential share of the revenue of its institutions of higher education. **Of a student population of close to 1,800,000 students, 21% are foreign**, and the share can be as high as **45% in certain universities**. That strategy rests on high-quality education delivered in English, significant spending on foreign student services, and favorable conditions for staying in the country after graduation. **Graduates qualify for a work visa valid for 2-4 years depending on the degree earned**; they may then apply for permanent residency. The benefits for Australia are several: substantial revenue for the major universities; benefits to the economy and to foreign trade; and balancing of the labor market through the presence of individuals selected for their qualifications and trained in the country.

In recent years, however, a new domestic debate has arisen

regarding the large presence of international students, and specifically the **relatively heavy dependence of Australia's universities on Chinese students**. Campuses with large numbers of Chinese students may be at a higher risk for conflicts (sometimes violent)—for example, related to demonstrations of support for the residents of Hong Kong or scientific events with participation from Taiwan or Tibet. On such occasions, the universities may have to choose between self-censorship and violation of the freedom of expression on campus, on the one hand, and, on the other, the risk of angering the sending country of one of their top student “clienteles”.



21%

**of Australia's postsecondary students
are mobile internationals in 2017**

CHINA POSITIONS ITSELF AS A HOST COUNTRY

Over the past 20 years, outbound Chinese students have occupied an ever-enlarging role in international student mobility. In 2017, they represented **more than 17% of global students abroad**.

For that reason, the proclivities of mobile Chinese students have been closely monitored by the major English-speaking host countries that depend on high tuition to fund their universities (the United States, Australia, and the United Kingdom) and that are sensitive to possible shifts. **The numbers of Chinese students grew during the five years between 2012 and 2017, particularly in the United States (+51%), Australia (+41%), and the United Kingdom (+28%).**

France is the eighth-ranked host of Chinese students, receiving about 3% of outbound Chinese students. Apart from Japan, the fourth-ranked host that has experienced a sharp drop in Chinese student enrollment (-18% over five years), France is **the only other country in the top 10 to have suffered a drop (-3% between 2012 and 2017).**

The share of Chinese postsecondary students who are internationally mobile increased between 2014 and 2017 to reach 2.1%, a relatively high level given the size of China's student population². Although there are political signs suggesting a possible slowdown in the outbound mobility of Chinese students in coming years, such a slowdown has not yet been observed. At the most, one might say that **outbound student mobility, despite strong growth, may still be below its potential**. It is possible, however, to detect more and more incentives for the best students to pursue their education without leaving the country. The share of Chinese students who return home after their studies abroad has been relatively large in recent years, earning such students the nickname *haigui* (sea turtles).

2. By way of comparison, the share is only 1% in India.

Known more as a sending country, **China is increasingly positioning itself as a host country and today stands in ninth place.**

Though there has indeed been a marked influx of students into China in recent years (a large share of these students are even studying Chinese), that influx is difficult to analyze because of the absence of detailed data on the origins of students in China. The figures published by the Chinese Ministry of Education¹ must be viewed with caution, though they may reveal certain trends². In addition to drawing students from Asia and Oceania, one detects growing recruitment in Sub-Saharan Africa (Ghana, Nigeria, Tanzania). Finally, China

stands out for the very large number of joint programs and offshore campuses that it hosts (close to 2,500), which indicate growing exchanges and interconnections with numerous countries—the United States and the United Kingdom, of course, but also France, which is a party to no fewer than 15 Franco-Chinese cooperative programs and institutions.



THE REORIENTATION OF INDIAN MOBILITY

India is the second-ranked country of origin, after China, in international student mobility. It experienced **particularly strong growth—73%—in the number of mobile students in the five years from 2012 to 2017.** A very large share of that mobility, **43%, headed for the United States. Australia (16%) and Canada (10%)** were also favored destinations. University quality and instruction in English are decisive factors for mobile Indian students, 77% of whom select an English-speaking country. In recent years, growth in the number of Indians choosing the United States has slowed somewhat, in favor of **Australia (+350% between 2012 and 2017) and Canada (+250%)**. These rates of growth mask the fact that the mobile segment of the Indian student population (about 1%) is relatively weak compared with other countries, notably China. If the Indian economy picks up, and if a larger share of the population can benefit, India has the potential to become tomorrow's leader in student mobility.

Formerly the second most common destination for Indian students, **the United Kingdom lost nearly half (45%) of its Indian students over the five years under study and now occupies fourth place.** According to the British government, the number of student visas granted moved strongly upward in 2018-2019³. The cause? The two-year post-graduation work visa, eliminated in 2012, was reintroduced, effective in 2020. With a bit more than

13,000 Indian students, fifth-place Germany closely trails the United Kingdom. Germany recruits largely in technical and scientific fields.

As India's outbound mobility has grown across the board, it has also **diversified**. Although not as prestigious as the most favored destinations, other countries that are less costly and closer to India are drawing more and more Indian students, notably in medicine. Top among these new destinations are **the United Arab Emirates, Ukraine, and Kyrgyzstan**. As the seventh-ranked host country, the United Arab Emirates benefits from having several campuses in India.

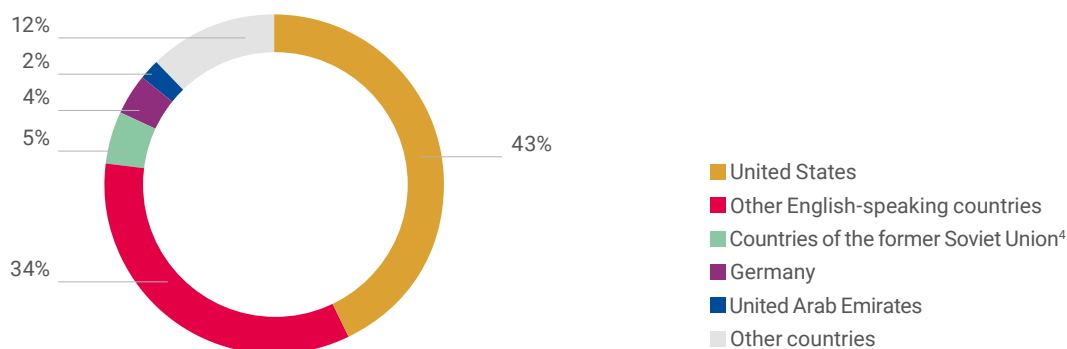


1. http://www.moe.gov.cn/jyb_xwfb/gzdt_gzdt/s5987/201904/t20190412_377692.html.

2. Judging from these data, the number of degree-seeking students hosted in 2018 would be about 260,000, on par with France and Germany. The reason for the gap between this figure and the one published by UNESCO, which is 100,000 less, is unknown.

3. <https://www.gov.uk/government/news/63-increase-in-indian-students-choosing-to-study-in-the-uk>.

➤ Destinations of internationally mobile Indian students



Source: UNESCO Institute for Statistics (UIS), January 2020.

Traditionally, many Indian students go abroad to earn degrees **in fields that are equally prestigious at home: the sciences, medicine, engineering, and business.** A large share of those degrees are at the master or doctoral level, and men outnumber women⁵. France draws too few Indian students, even though the number

of those who do choose France is on the rise. According to France's Ministry of Higher Education, Research, and Innovation, that number grew 130% over the five years between 2012 and 2015. The pace should quicken thanks to the mutual recognition of degrees, a decision made in March 2018 and implemented by decree in June 2019.

A BOOM IN VIETNAMESE AND NEPALESE STUDENTS IN JAPAN

Japan has preserved its status as the **eighth-ranked host country** and continues to attract more students. For the last ten years the country has worked to internationalize its higher education system by improving the quality of its degree programs, generalizing the use of English as a language of instruction, and teaching Japanese.⁶ Thanks to the relative improvement in the economic situation of certain countries of the region, Japan's strategy has begun to bear fruit. The observed growth in inbound mobility does not stem so much from the growth in Chinese students, as from that of **Vietnamese and Nepalese students**. Vietnam is Japan's second-largest source of students; their numbers in Japan were up 8,000 from 2016 to 2017. Nepal is the fourth-largest source; it sent 4,000 more students to Japan in 2017 than it did the year before. Therefore Japan appears to be positioning itself as **the leading host country for degree-seeking intraregional mobility in Asia. An ambitious system of government grants supports and encourages the mobility trend**⁷.

Vietnam and Nepal are rapidly climbing the ranks of sending countries. They are, respectively, **in fifth place, up four spots from 2016, and in thirteenth place, up seven places**. For students from **Vietnam**, Japan is the leading destination for study abroad, followed by the United States and Australia. The top destinations of students from **Nepal** are similar, except that they favor Australia, where a third of mobile Nepalese students are enrolled. Improvements in economic conditions in the two countries, as well as the limitations of the national systems of higher education (especially in Nepal), are encouraging growing numbers of students from the emerging middle class to seek education abroad.

4. Russia, Ukraine, and Kyrgyzstan.

5. In France in 2018-2019, 83% of Indian students were enrolled in graduate programs. Only 32% of the students were women.

6. "National strategies for international student recruitment in higher education and research", *Les Notes*, no. 57, Campus France, October 2018, <https://www.campusfrance.org/en/resource/national-strategies-for-international-student-recruitment-in-higher-education-and-research>.

7. https://www.jasso.go.jp/en/study_j/scholarships/brochure.html.

REGIONAL TRENDS: MIDDLE EAST AND NORTH AFRICA

Student population: 15.2 million

Gross rate of enrollment in higher education: 52.9%

Inbound mobility: 123,000

Outbound mobility: 534,000

A region beset by instability for several years, the Middle East and North Africa (MENA) is also the site of **several emerging poles of attraction** for international student mobility. Although the region represents only **7% of the world's student population**, it deserves special attention for several reasons.

The region's **student population grew rapidly** between 2012 and 2017. It is expected to reach 20 million by 2027. Growth is more rapid in North Africa (up 26% in five years) than in the Middle East (+11%), thanks largely to Morocco's dynamism (+67%).

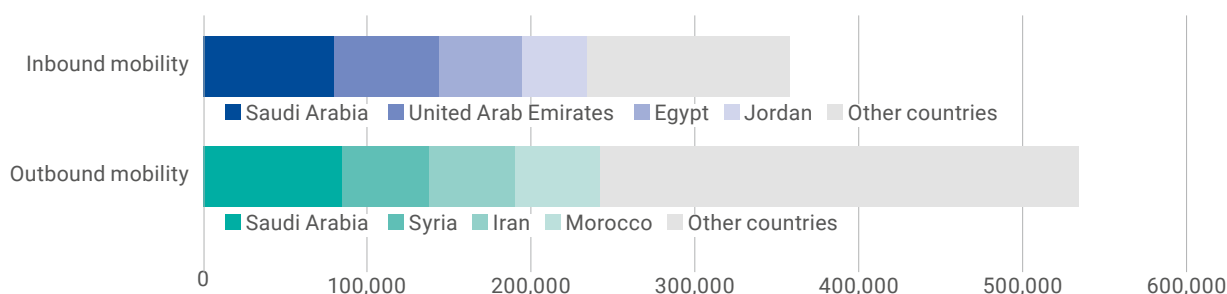
With 84,310 outbound students in 2017, 16% of the entire region's outbound volume, **Saudi Arabia leads MENA**

in sending students abroad. Syria, beset by armed conflict since 2011, is in second place; its outbound student population grew 186% between 2012 and 2017. **A quarter (25%) of MENA's internationally mobile students stay within the region.** Intraregional mobility is particularly pronounced among nationals of unstable countries; these students tend to enroll in institutions in neighboring countries. This is the case for 49% of Iraqi students, 41% of Syrians, and 39% of Yemenis.

The region's leading hosts are Saudi Arabia, the United Arab Emirates, Egypt, and Jordan. Together, the four countries host two-thirds of the inbound international students in the region. Jordan stands out for having a very high share of students from countries with which it shares a border (64% in 2017). It takes in large contingents of students from the Palestinian Territories, Iraq, and Syria. By contrast, **the United Arab Emirates and Egypt draw from a much more diversified set of countries.** Twelve percent of the international students in the United Arab Emirates are Indian; the three largest groups of students hosted by Egypt are Malaysians, Indonesians, and Thais.

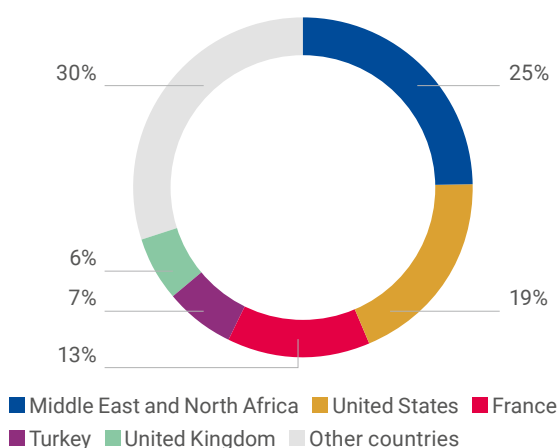
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➤ Major sending and receiving countries in the Middle East and North Africa



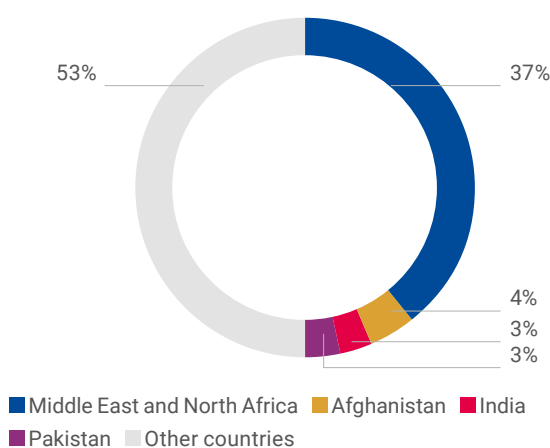
Source: UNESCO Institute for Statistics, January 2020.

➤ Destinations of internationally mobile MENA students



Source: UNESCO Institute for Statistics, January 2020.

➤ Origins of internationally mobile MENA students

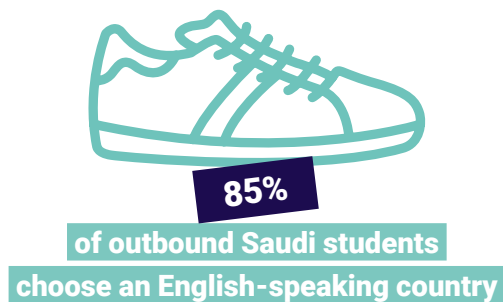


THE EXPANDING RANGE OF SAUDI HIGHER EDUCATION

In the five years under study, **the number of students in Saudi Arabia grew faster than the overall Saudi population** (+39% vs. +14% between 2012 and 2017). In 2017, the kingdom had 1.7 million postsecondary students, a number that should continue to increase as the government's higher education plan is implemented as part of its "Vision 2030."

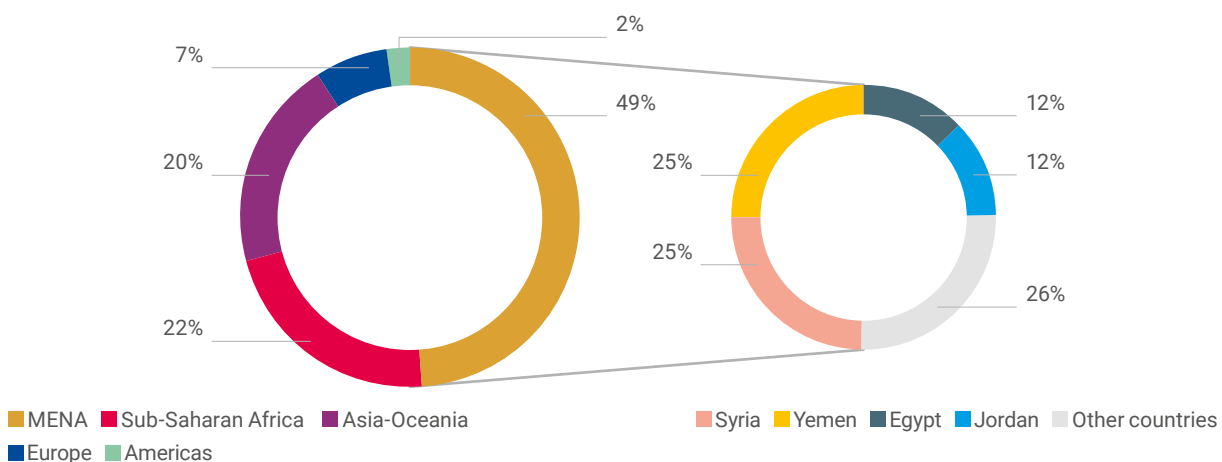
The increase in the number of students was accompanied by **strong growth in outbound student mobility** (+30% in five years). Today, 5% of Saudi students study abroad (84,310 in 2017), double the world average of 2.4%. These departures abroad, particularly to English-speaking countries, have been strongly encouraged since 2005 by the King Abdullah Scholarships Program¹. The program's purpose is to endow the kingdom with a skilled labor force. **Sixty-five percent of mobile Saudi students choose the United States**, while the United Kingdom, Canada, and Australia together host another 20%. In 2017, France hosted just 434 Saudi students, but the volume is expected to rise with the implementation of the Al-Ula/Campus France program, launched in 2018. The program's target is 1,000 inbound Saudi students in ten years². Worthy of note is the drop in outbound mobility between 2016 and 2017 (-7%).

If that drop becomes a trend, it may signal the advent of Saudi institutions capable of keeping top students at home.



Saudi Arabia's appeal as a study destination has become steadily stronger. Hosting 78,344 international students in 2017, the kingdom ranks fifteenth among host countries and number one in MENA. **Growth slowed, however, between 2016 and 2017 (-2%).** The slowdown applied to all sending regions, particularly Sub-Saharan Africa (-3%) and North Africa (-4%).

➤ Origin of international students in Saudi Arabia in 2017



Source: UNESCO Institute for Statistics, January 2020.

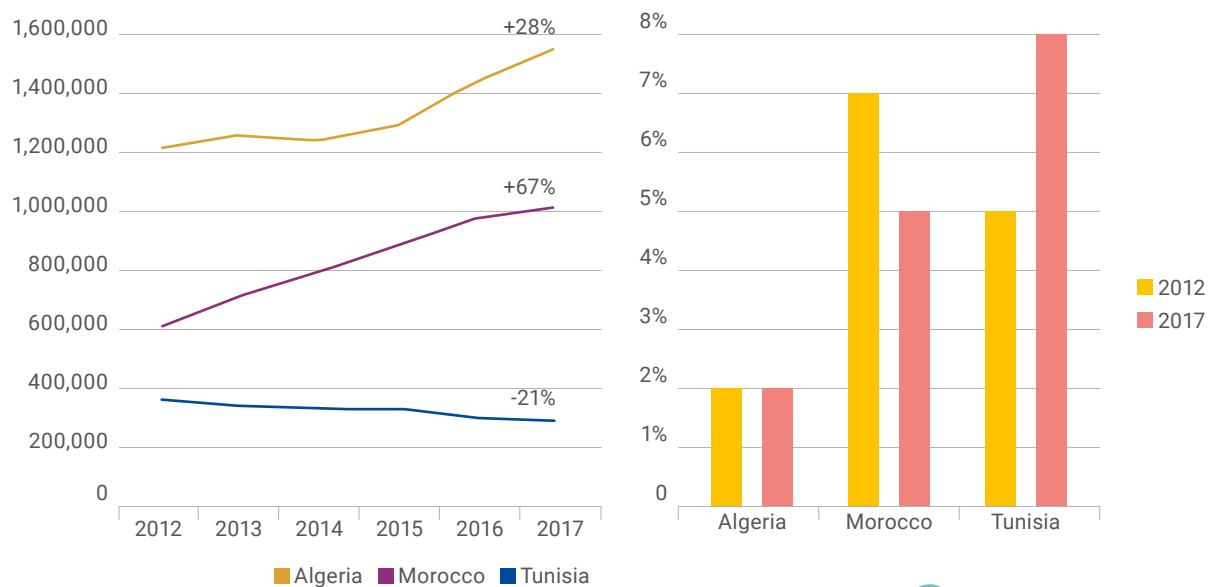
1. <https://uksacb.org/language/en/king-abdullah-scholarships-program/>.

2. <https://www.campusfrance.org/en/al-ula-campus-france-program-training-of-the-first-68-saudi-laureates-will-kick-off-soon>.

NORTH AFRICA: A VARIETY OF PATHS

Although Algeria, Morocco, and Tunisia have common historic and cultural characteristics, they diverge with respect to higher education and student mobility.

➤ Evolution of student populations and shares of students participating in outbound mobility



Source: UNESCO Institute for Statistics, January 2020.

With the country under growing demographic pressure, **Algeria's** student population grew rapidly (by 28%) between 2012 and 2017. By contrast, the share of Algerian students participating in outbound mobility shrank over the same period and is now below the world average. **The great majority (80%) of outbound students head for France**, but departures for Saudi Arabia (up 99% between 2012 and 2017), Turkey, and India are increasingly common.

Morocco's student population has expanded even faster than Algeria's (+67% in five years). The share of internationally mobile students remains high (5%), despite a drop between 2012 and 2017. **The top destination for mobile students is the EU (77% in 2017)**, particularly France (58%). At the same time, Morocco is welcoming growing numbers of international students (+102% in five years), making it **an emerging pole of attraction** in the region. Seventy-four percent of the incoming students are from Sub-Saharan Africa, particularly Mali, Guinea, and Côte d'Ivoire. Indeed, Morocco is the leading destination of students from those three countries.



3 out of 4 international students in Morocco are from Sub-Saharan Africa

Unlike its neighbors, Tunisia's student population has shrunk (-21% over five years). Nevertheless, the share of students participating in outbound mobility has grown appreciably, reaching 8% in 2017. Of the three countries, Tunisian sends the smallest share of its students to France: **only 44% of mobile Tunisian students enroll in France**. Many elect to study in Germany (19%), Romania (6%), or Canada (4%). As with Morocco, **inbound mobility increased substantially between 2012 and 2017**, but from lower starting levels (6,370 inbound students in 2017). The leading countries of origin of international students in Tunisia are Cameroon (10% of incoming students), Mauritania (10%), and the Democratic Republic of Congo (9%).

REGIONAL TRENDS: SUB-SAHARAN AFRICA¹

Student population: 9.1 million

Gross rate of enrollment in higher education: 11.7%

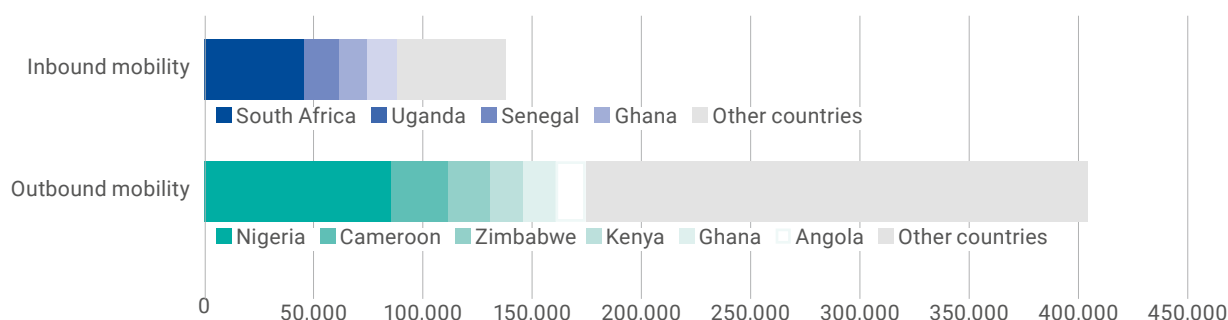
Inbound mobility: 138,000

Outbound mobility: 404,000

Although the student population of Sub-Saharan Africa is the smallest of all world regions, **this is also the region where the student population is growing the fastest** (up 26% from 2012 to 2017, and up 8% in just the last year of the period). Owing to rapid demographic

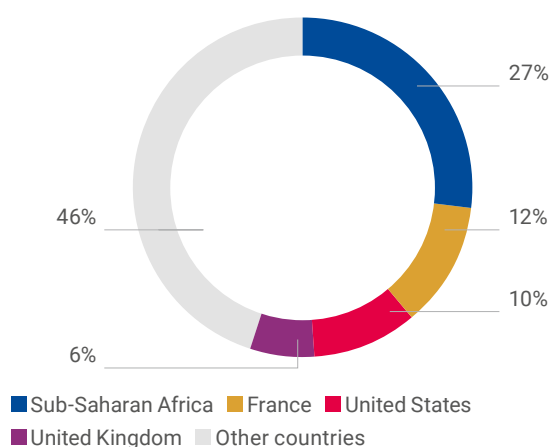
growth and a low starting enrollment rate (11.7%), it is expected that the region's student population will reach 22 million by 2027. Such rapid growth poses risks for higher education systems already suffering from chronic underinvestment. **More than one-third of the region's student population resides in two countries: Nigeria and South Africa.** Among the other countries with large numbers of postsecondary students are Ethiopia (750,000), Sudan (650,000), and the Democratic Republic of Congo (460,000). Among the most dynamic are Kenya (+91% between 2012 and 2017), Ghana (+50%), and Uganda (+108%).

➤ Major sending and receiving countries in Sub-Saharan Africa



Source: UNESCO Institute for Statistics, January 2020.

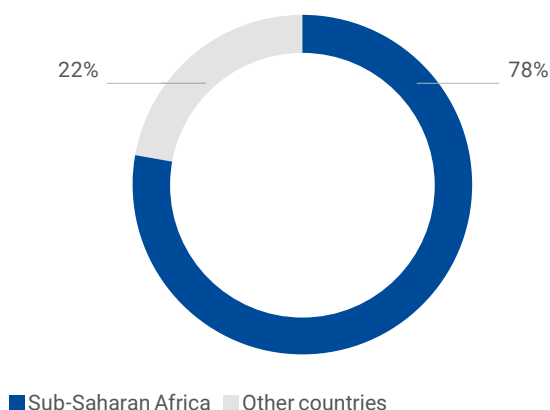
➤ Destinations of students from Sub-Saharan Africa



Student mobility in Sub-Saharan Africa reflects (i) free choice; (ii) pressures caused by the political and economic instability that prevails in several countries of the region; and (iii) systems of higher education that are too often underfinanced and of uneven quality. As a result, the postsecondary students of the region are the most mobile in the world—more than 400,000 of them crossed a border in 2017, or 4.5% of the total student population (compared with the world average of 2.4%). And the number of mobile students in Sub-Saharan Africa is growing slightly more quickly than the student population (+28% between 2012 and 2017). Nigeria, the region's leading country of origin, saw its volume of mobile students swell by 50% in five years, reaching 85,000. Nigeria is followed in volume by Cameroon (26,000) and Zimbabwe (19,000). Among the fastest-growing countries are Ghana (+44%), Angola (+46%), Sudan (+63%), and the Democratic Republic of Congo (+60%).

1. For more information, see *Mobilités et coopérations universitaires en Afrique subsaharienne*, Dynamiques régionales no. 1, Campus France, December 2019, https://ressources.campusfrance.org/publications/dynamiques_regionales/fr/dynreg_afrique_fr.pdf.

➤ Origin of students hosted in Sub-Saharan Africa



■ Sub-Saharan Africa ■ Other countries

Source: UNESCO Institute for Statistics, January 2020.



About three-quarters of the young Africans who earn their degree outside their home country earn it outside Africa. **France, the leading destination for outwardly mobile students from Sub-Saharan Africa**, welcomed about 50,000 of them in 2017, a 20% increase from 2012. France is followed by the United States, which hosts growing numbers of Sub-Saharanans (+33%). South Africa has slid into third place, benefitting from the convenience of its location. **China, Saudi Arabia, and Turkey have recently seen a rapid increase in the number of inbound African students.** The same is true of other countries that conduct classes in English, such as Canada (+95% in five years) and Malaysia (+110%).

Sub-Saharan universities hosted only 138,000 international students in 2017. **Most of the inbound mobility in Sub-Saharan Africa comes from within the region (78%).** South Africa is a partial exception, as it took in 850 U.S. students and a like number of Germans in 2017. Senegal also attracts a non-negligible number of students from North Africa, chiefly Morocco (900).

SOUTH AFRICA: LARGELY REGIONAL RECRUITMENT

South Africa's rate of enrollment in higher education, while low, is nevertheless quite a bit higher than the average for Sub-Saharan Africa (22%). Like many of the countries in the region, it has trouble accommodating growing numbers of young people of university age. In South Africa, **only one in eight students gains admission to an institution of higher education.** In addition to a shortage of places, young South Africans face high tuition charges, very unequal access, and great differences in the quality of education and level of instruction, as well as a shortage of programs at the master and doctoral levels.

The isolation of the country and of its institutions of higher education during the apartheid years explains why outbound mobility remains low even today. Interuniversity cooperation began to develop only after the lifting of the academic boycott imposed in the 1960s against the segregationist regime. On the other hand, **South Africa is a major host country, welcoming 45,000 international students in 2017,**

up a modest 7% from 2012. This tepid growth underlines the ambivalence of a country that prides itself on being a hub of higher education and research¹ while simultaneously maintaining a strict anti-immigration policy. More than three-quarters of the students hosted by the country's institutions are from elsewhere in Sub-Saharan Africa. South Africa draws students from every country in Africa, **but its neighbors (Zimbabwe, Lesotho, Swaziland, Namibia, Botswana, and Mozambique) make up more than half (57%) of the Sub-Saharan students who enroll in its universities.** It draws English-speaking students from countries such as Kenya, Mauritius, and Uganda and students from geographically close countries such as Angola. South Africa is banking on the internationalization of its universities, several of which are world class. **Its knowledge-based diplomacy seeks to further the country's status as a key actor at the regional and international level.**

1. South Africa alone generates 43% of the scientific production of Sub-Saharan Africa, producing just under 20,000 scientific publications. See "Afrique du Sud," Fiche Recherche, Campus France, July 2019. https://ressources.campusfrance.org/publications/recherche_pays/fr/rech_afrique_du_sud_fr.pdf.

NIGERIA: SUB-SAHARAN AFRICA'S TOP SENDING COUNTRY²

Nearly one in four inhabitants of Sub-Saharan Africa lives in Nigeria. Africa's most populous nation has also been its richest since 2016. Nigeria's population is quite young and likely to add tens of thousands of new postsecondary students each year. **It is already the Sub-Saharan country with the largest population of postsecondary students** (2 million in 2019) and the leading country of origin of African international students, with 85,000 mobile students in 2017.

Nigeria also ranks eighth in the world as a country of origin of international students, following very rapid growth (48%) in the five years between 2012 and 2017. Unmet demand for education is very strong, thanks to the saturation of the country's universities and the emergence of a monied class whose members are able to marshal the financial resources needed to send their children abroad to earn a university degree. Nevertheless, in 2017 the number of mobile Nigerians was down 12% from the previous year, probably as a result of the drop in the price of oil. Already, nearly 40% of outbound Nigerian students hold scholarships, most of which are funded by oil revenues. Another element in the unfavorable economic situation is the depreciation of the naira, Nigeria's currency, which pushes up the cost of study abroad. This dynamic may be temporary, however. Preliminary figures for 2018 suggest that the number of Nigerians participating in outbound mobility nosed up again.

The leading host country for Nigerian students is the United Kingdom, which alone absorbed nearly 15% of the country's outbound students in 2017. As a whole, **the European Union hosted one in five mobile Nigerians**. The United States is the second-ranked host country for Nigerian students, and saw their numbers rise very rapidly from 2012 to 2017 (+76%). Canada, in fifth place, recorded even more rapid growth over the period (+166%).

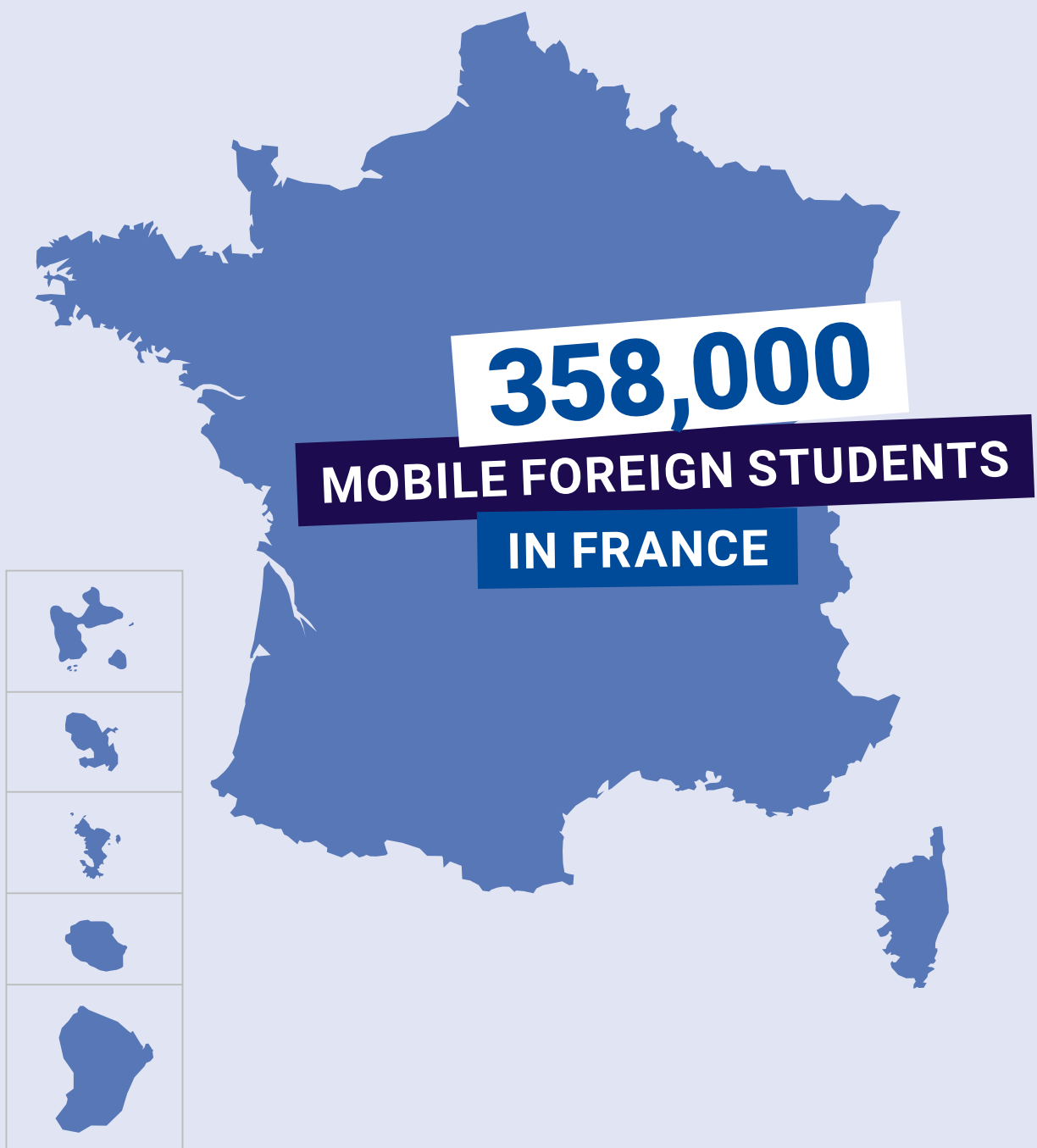
Many Nigerians earn their degree in Asia-Oceania. Malaysia, in particular, hosted 11,000 Nigerians in 2017, two-and-a-half times more than five years before. It is drawing growing numbers of students thanks to the quality of its educational institutions, the proliferation of programs taught in English, and an expanding network of overseas campuses. A Muslim-majority nation, Malaysia attracts large numbers of Muslim students. Moreover, the cost of living is modest, tuition rates are lower than those of the leading host countries, and

Malaysia has signed cooperative agreements with Nigerian institutions and local governments. In fact, several states, including Kano, Zamfara, Kaduna, and Sokoto, offer grants to students choosing to study in Malaysia. Despite the absence of detailed data, it appears that China is another appealing destination. It appears to have provided scholarships to at least 3,000 Nigerian students.

In 2017, **just under one in four mobile Nigerian students chose another country of Sub-Saharan Africa as their study destination**: 18% of them were enrolled in institutions in one or another of the countries on the Gulf of Guinea. Ghana welcomed 9,000 Nigerians in 2017. The two countries are geographically close, Ghana's tuition rates are affordable, and instruction is in English. Most important, Ghana's system of higher education enjoys a good reputation and maintains numerous partnerships with foreign universities. Finally, Ghana and Nigeria have a common framework for the recognition of degrees, a common bachelor's degree, and academic cooperation within the Commonwealth. International students can also take advantage of the eight World Bank centers of excellence located in Ghana. Benin hosts about 6,000 Nigerian students, thanks largely to its geographic proximity and the fact that classes are conducted in English.



2. For more information, see *Dossier Nigeria*, op. cit.



2

STUDENT MOBILITY IN FRANCE

Although France continues to attract growing numbers of foreign students, its position vis-à-vis the other major host countries has slipped somewhat. In 2018-2019, France was host to 358,000 inbound mobile students, 21% more than five years before. And its share of internationals in the overall population of postsecondary students is higher than that of its U.S. and German competitors.

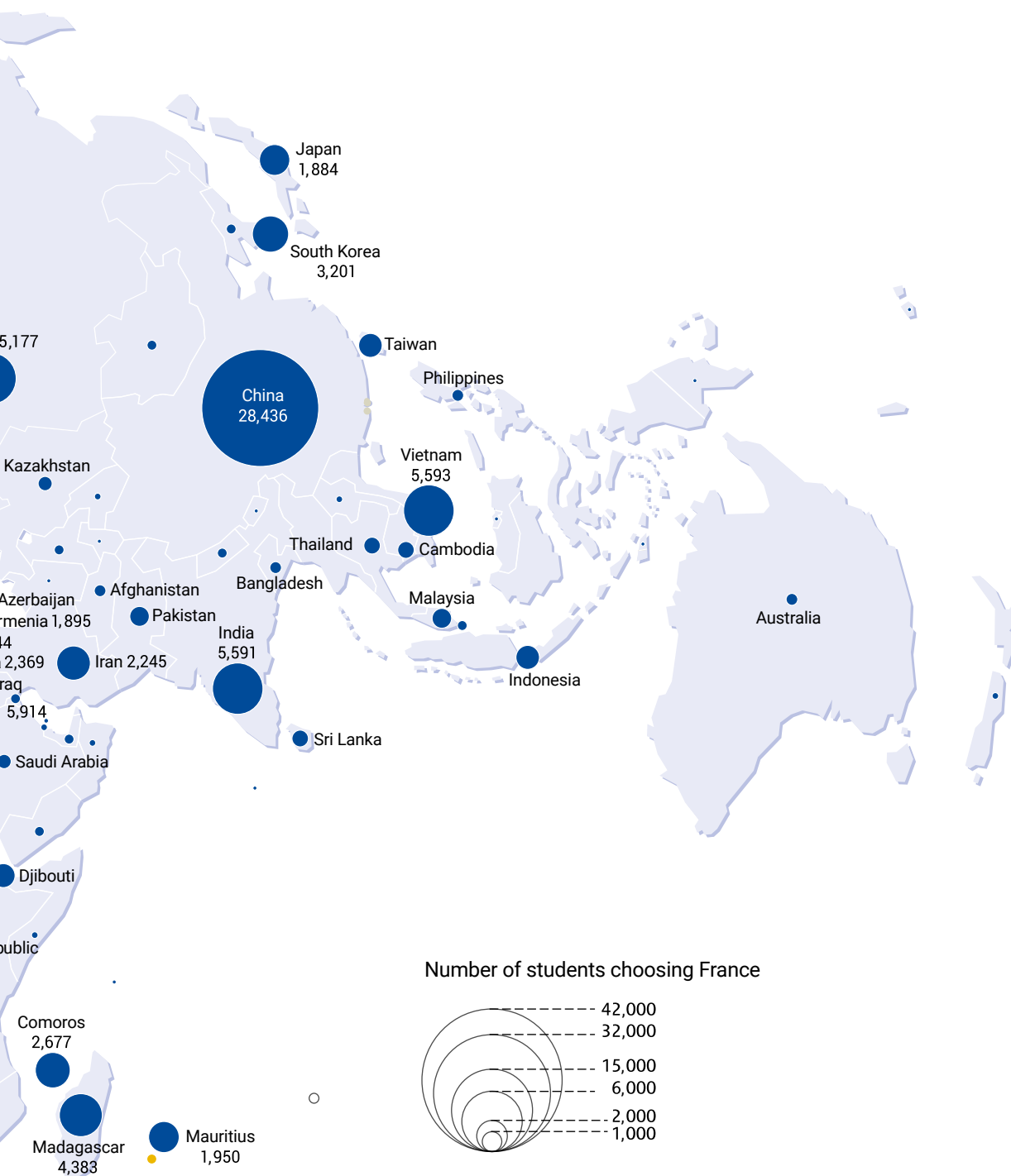
Patterns of recruitment of foreign students are changing. French institutions are attracting growing numbers of students from Africa and the Middle East. By contrast, the numbers of Europeans and Asians are growing less quickly—or even declining. That is the case with Chinese, German, and Vietnamese students.

With more than 90,000 outwardly mobile students in 2017, France ranks sixth as a country of origin of mobile students. The slight contraction observed in the volume of French students abroad is due to a large drop in departures for Belgium. Canada has become the top destination for French students.

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Source: MESRI-SIES 2019.

FRANCE'S PLACE IN WORLDWIDE STUDENT MOBILITY

10-year growth in international students



+71%

world



+32%

France

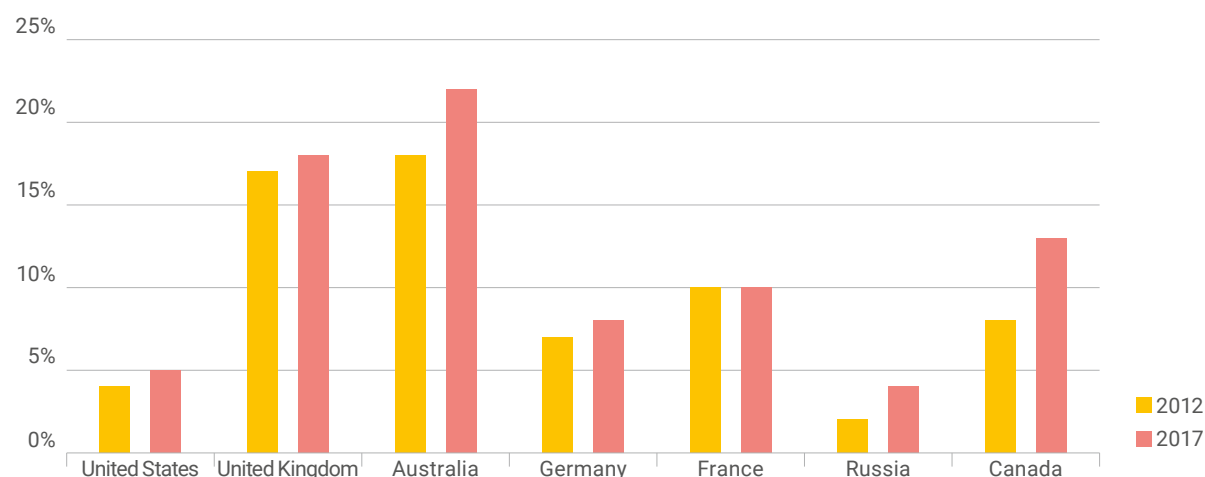
FRANCE REMAINS

A MAJOR HOST COUNTRY,

BUT ITS POSITION MAY BE SLIPPING

From its position as the number three host country in 2011, **France dropped by 2017 to fifth place**. That position remains solid, but France has suffered for several years now from the ever stronger appeal of English as a language of instruction, and from the appearance of new destinations. In 2017, France attracted 5% of the world's mobile students, compared with 7% five years previous¹. And the 10-year growth in the number of internationals in France is lower than the growth in the number of mobile students around the world (32% vs. 71% between 2007 and 2017)².

► International share of student population in major host countries, 2007 and 2017



Source: OECD, December 2019.

The slowdown in internationalization is also evident in the percentage of internationals as a share of the postsecondary student population. In France, that share remained around 10% between 2012 and 2017³, while it grew in other countries during the same five-year period (rising 4 percentage points in Australia and 5 in Canada). The fact remains that **France has a higher share of international students** than the United States, Germany, or Russia.



5%

**of the world's mobile students
choose France**

1. Reference years: 2012 and 2017. Source: UNESCO Institute for Statistics, December 2019.

2. Change from 2007 to 2017. Source for world: UNESCO Institute for Statistics. Source for France: MESRI-SIES.

3. Source: UNESCO Institute for Statistics, December 2019. This share pertains only to internationally mobile students; it differs, therefore from the figures produced by MESRI-SIES, which count all foreign students. For more details, consult the methodology that begins on page 58.

COUNTRIES OF ORIGIN OF FOREIGN STUDENTS IN FRANCE



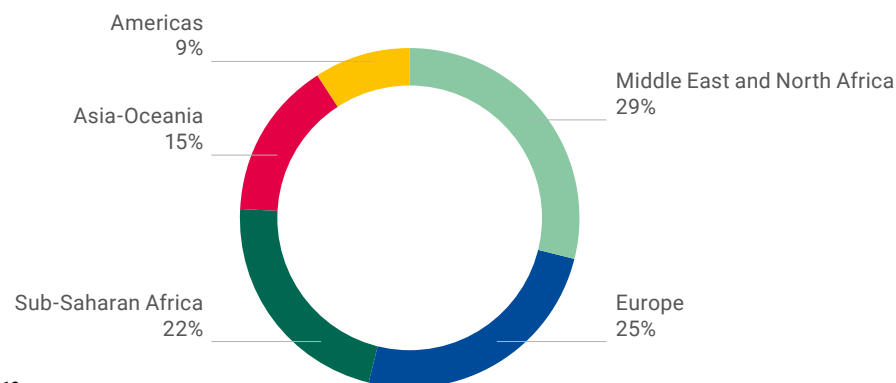
► Top 25 countries of origin of foreign students in France (2018-2019)

Country of origin	Number of students	Share	Change over 5 years (2013-2018) ⁴	Rank	
				2013	2018
Morocco	41,729	12%	+23%	1	1
Algeria	31,196	9%	+42%	3	2
China	28,436	8%	-6%	2	3
Italy	14,692	4%	+58%	5	4
Tunisia	13,025	4%	+10%	4	5
Senegal	12,415	3%	+39%	7	6
Côte d'Ivoire	8,924	2%	+77%	13	7
Spain	8,418	2%	+32%	9	8
Germany	8,326	2%	-7%	6	9
Cameroon	7,445	2%	+2%	8	10
Portugal	6,521	2%	+58%	18	11
United States	6,422	2%	+31%	14	12
Lebanon	5,914	2%	+28%	15	13
Brazil	5,808	2%	+13%	11	14
Vietnam	5,593	2%	-10%	10	15
India	5,591	2%	+130%	31	16
Congo, Rep.	5,546	2%	+64%	23	17
Russia	5,177	1%	+1%	12	18
Gabon	4,970	1%	+18%	17	19
Belgium	4,691	1%	+16%	19	20
Madagascar	4,383	1%	+11%	21	21
Colombia	4,361	1%	+30%	24	22
Turkey	4,244	1%	+39%	25	23
Guinea	4,199	1%	+19%	22	24
United Kingdom	4,112	1%	+3%	20	25
Other countries	105,867	30%	+19%	-	-
Total	358,005	100%	+21%	-	-

Source: MESRI-SIES 2019.

4. See page 58 for methodology.

► Breakdown of foreign students in France, by region of origin



Source: MESRI-SIES, 2019.

GROWTH IN THE NUMBER OF STUDENTS FROM INDIA, CÔTE D'IVOIRE, AND ITALY; A DIP IN THE NUMBERS FROM CHINA AND VIETNAM

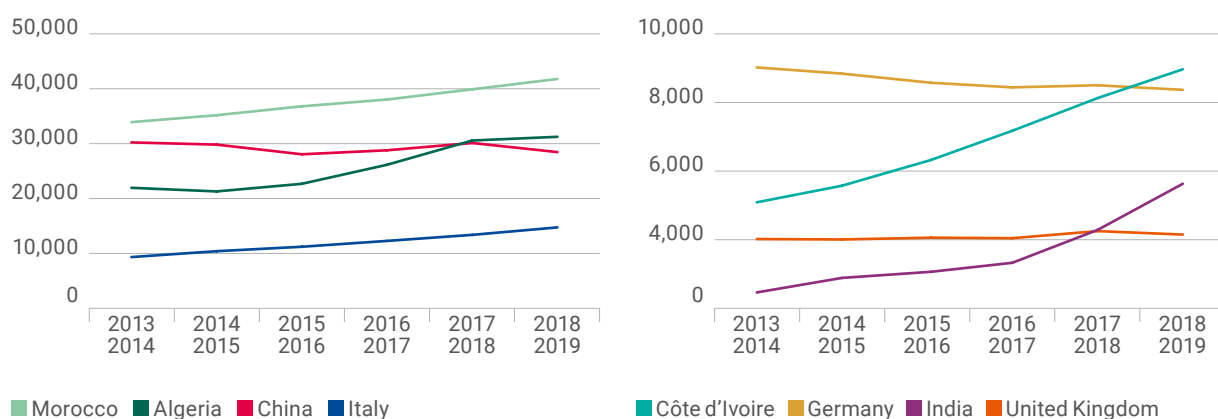
In 2018-2019, France hosted students from **196 countries**. Their distribution remained stable, with **46% of the total coming from Africa** and one in four coming from Europe. Over five years, the intake from all regions grew, with two exceptions: Oceania, which remained stable at 0.2% of the foreign-student total) and South America (5% of students), which dipped slightly (-1% over the five years).

Focusing on individual countries, several trends involving the major countries of origin continued to make themselves felt. **Morocco and Algeria retained their first and second places, with China in third**. Student numbers from the top two grew faster over the five years than did the full pool of internationals: 23% and 42%, respectively, between 2013 and 2018. Yet a slight slowdown is evident in the growth of the inflow from Algeria, with the last year of the period showing only 2% growth. Other notable

advances are in students from **India (+130% in five years)**, an advance that pushed India up into sixteenth place in terms of sending students to France; from **Côte d'Ivoire (+77%)**; and **Italy (+58%)**, whose nationals constitute France's fourth-largest contingent of foreign students.

In the opposite direction, **Chinese students are less numerous** (-6%) than they were in 2013, a downward trend that became more marked in 2017 (-5% in one year). Similarly, **Vietnam** sank five steps in the ranking between 2013 and 2018 (-10%). Growth slowed in the contingents of students from the **United Kingdom and Germany**. The number of U.K. students rose only 3% over the five years, while Germany, down 7%, sank three places in the ranking of countries of origin. It now stands in ninth place.

► Change in numbers of foreign students in France, 2013-2018



Source: MESRI-SIES, 2020.

VISAS GRANTED TO FOREIGN STUDENTS: DISTRIBUTION AND EVOLUTION

► Student visas granted in 2018, by type and duration

Type of visa	Number granted in 2018	Distribution	Change over three years (2015-2018)
Student	108,590	96%	+14%
Short stay	11,701	10%	-2%
Long stay	96,889	86%	+17%
Trainee	4,852	4%	0%
Short stay	2,100	2%	-30%
Long stay	2,752	2%	+50%
Total	113,442	100%	+14%



Source: Interior Ministry 2019.

GROWTH IN LONG-STAY STUDENT VISAS, ESPECIALLY FOR STUDENTS FROM SUB-SAHARAN AFRICA

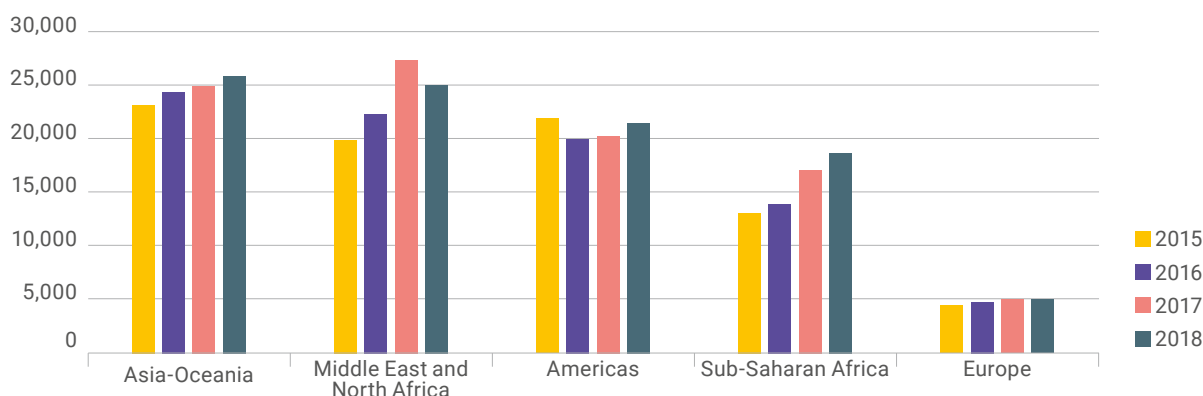
In France, 113,442 visas were granted in 2018 for purposes of academic study or practical training, an increase of 14% over the preceding three years. The gain is largely attributable to increases in long-stay student visas (+17%).

The breakdown of long-stay student visas by region of issue differs rather widely from the overall distribution of foreign students in France, largely because of the visa waiver enjoyed by nationals of the Schengen Area and the European Economic Area. In addition, a portion of the foreign students present in France carry a residency permit issued for another reason¹. **Twenty-seven percent of long-stay student visas were issued**

to students from Asia-Oceania and 22% to students from the Americas. Non-EU Europe accounts for only 5% of the visas issued; and the number held steady over the three-year period.

The visa pattern has exhibited significant changes in recent years. Some 18,857 long-stay visas were issued in 2018 to students from Sub-Saharan Africa, 43% more than in 2015. The steepest increases were in West Africa (Chad, Senegal, Congo, Togo, and Ghana). The change is probably the result of France's recent policy of openness toward African students².

► Breakdown of long-stay student visas, by region of origin and year of issue

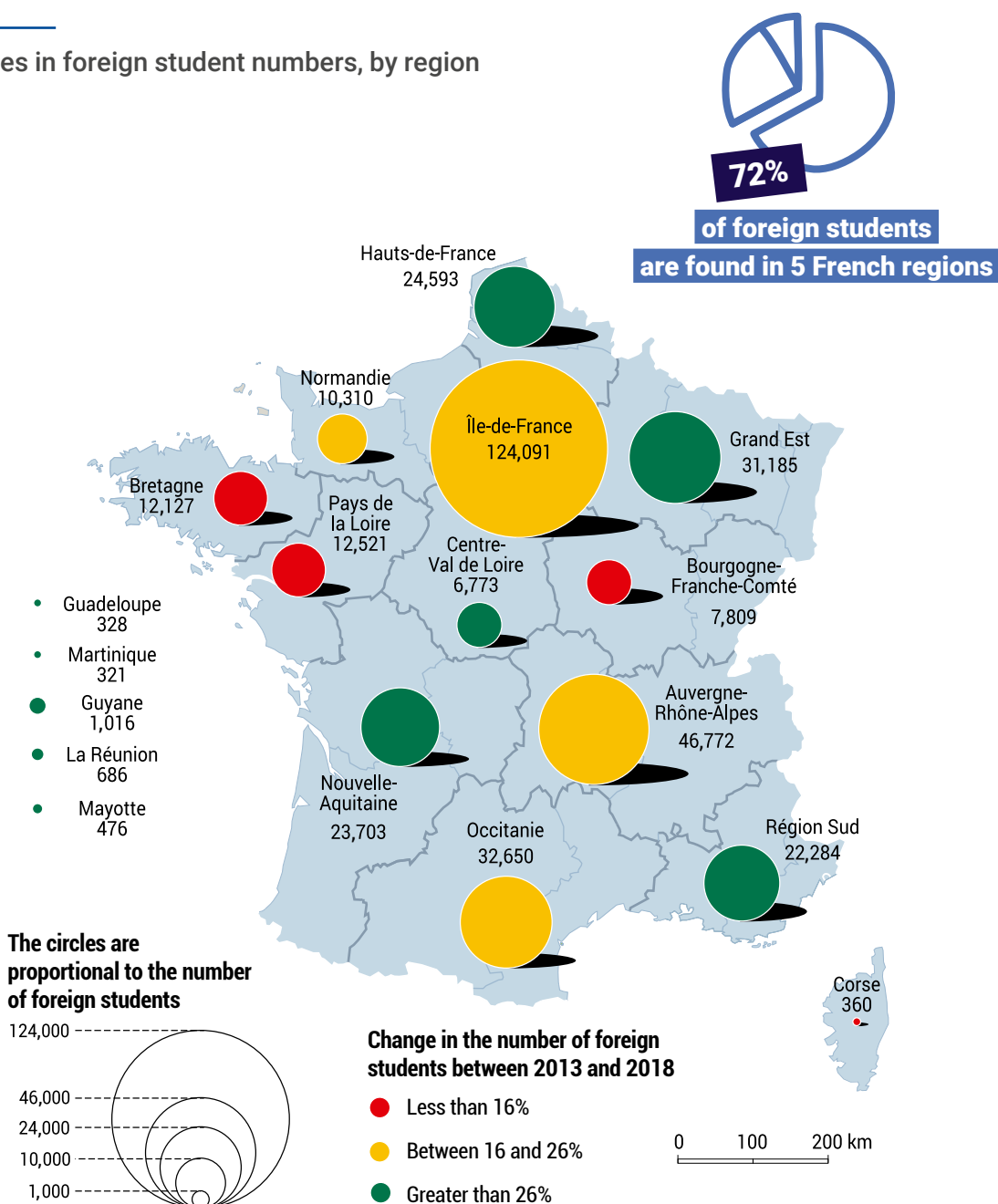


Source: Interior Ministry September 2019.

1. Eighteen percent of the foreign students enrolled in French universities in 2018 earned their secondary-school diploma in France and probably hold a residency permit. Most of these students are of European or African origin. See page 51 for additional details.
 2. President Emmanuel Macron's speech at the University of Ouagadougou on November 28, 2017, exemplified the policy of openness toward Sub-Saharan students.

INBOUND INTERNATIONAL STUDENT MOBILITY BY FRENCH REGION

► Changes in foreign student numbers, by region



Source: MESRI-SIES, 2019.

UNEVEN GROWTH IN NUMBERS FROM REGION TO REGION

Nearly three-quarters (72%) of foreign students in France are enrolled in just five regions: Île-de-France, Auvergne-Rhône-Alpes, Occitanie, Grand Est, and Hauts-de-France. With 124,091 foreign students, **Île-de-France alone hosts more than one-third of the total.**

The share of foreign students in the larger student population provides another indicator of their uneven presence across France. From 13% for France as a whole, the share drops to 6% in Corsica and 9% in Brittany and

the Pays de la Loire. By contrast, **18% of the students in the Île-de-France are foreign**—and 19% in the Academy of Paris alone. Their share in Grand Est is 15%.

Over five years, the number of foreign students rose 21%. Some regions experienced even higher rates of growth: **+30% in Centre-Val de Loire and Grand Est; +28% in Hauts-de-France.** By contrast, Bourgogne-Franche-Comté and Brittany saw their foreign student population grow by only 9% and 12%, respectively.

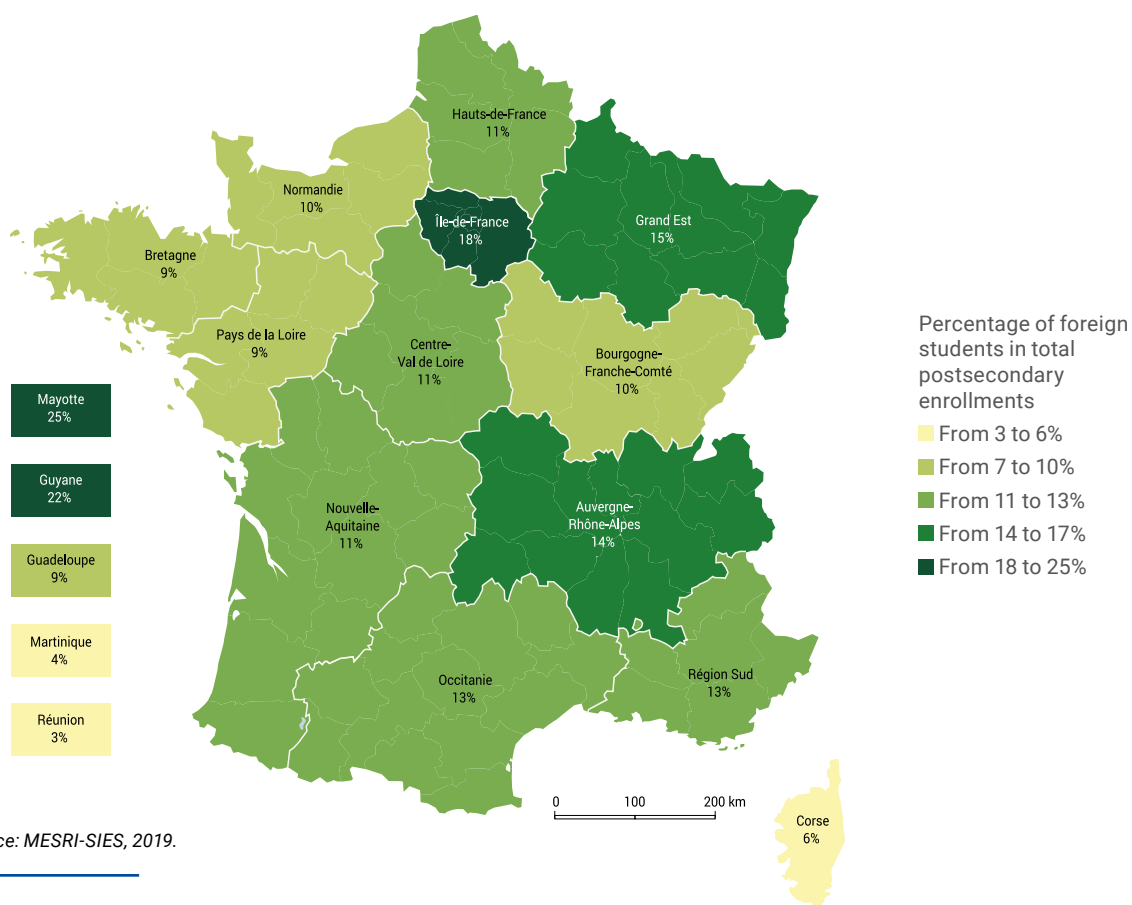
► Breakdown of foreign students by host region

	Host region	Number	Share	Change (2013-2018)
1	Île-de-France	124,091	35%	+18%
2	Auvergne-Rhône-Alpes	46,772	13%	+25%
3	Occitanie	32,650	9%	+17%
4	Grand Est	31,185	9%	+30%
5	Hauts-de-France	24,593	7%	+28%
6	Nouvelle-Aquitaine	23,703	7%	+26%
7	Région Sud	22,284	6%	+26%
8	Pays de la Loire	12,521	3%	+13%
9	Bretagne	12,127	3%	+12%
10	Normandie	10,310	3%	+18%
11	Bourgogne-Franche-Comté	7,809	2%	+9%
12	Centre-Val de Loire	6,773	2%	+30%
13	Outre-Mer	2,827	1%	+72%
14	Corse	360	0%	+12%
Total		358,005	100%	+21%

Source: MESRI-SIES 2019.

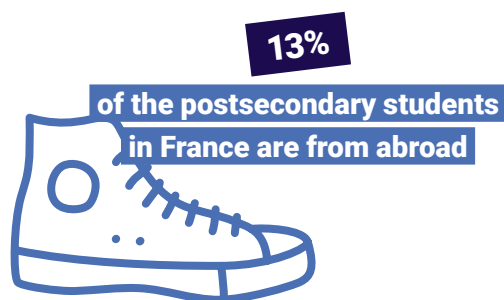
45

► Share of foreign students in total student population, by region (2018-2019)



Source: MESRI-SIES, 2019.

FOREIGN STUDENTS IN FRENCH INSTITUTIONS



In one year, the number of foreign students grew by 4.9%, slightly higher than the rate of growth the year before (+4.5%). The rate of growth in the foreign student population also exceeded that of all higher education enrollments in France (+2.1% between 2017 and 2018)¹. The same was true of the three years between 2015 and 2018. However, foreign students are not spread evenly across all postsecondary institutions.

► Breakdown of foreign students in France by type of institution

Type of institution	Number of foreign students, 2018-2019	Share	Change over three years (2015-2018)	Percentage of student population
Universities	246,890	69%	+10%	15%
Schools of business and management	36,790	10%	+70%	19%
Schools of engineering	26,216	7%	+17%	16%
Schools of art and architecture	10,313	3%	+25%	12%
Postsecondary programs offered in secondary schools (e.g., preparatory programs, technical certificate programs)	16,350	5%	+31%	5%
Other institutions	21,446	6%	+10%	7%
Total²	358,005	100%	+16%	13%²

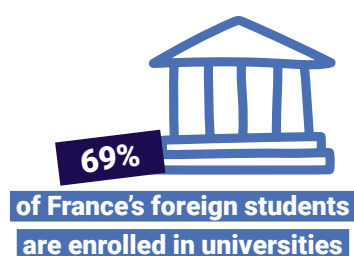
Source: MESRI-SIES, 2019.

UNIVERSITIES REMAIN THE FIRST CHOICE OF FOREIGN STUDENTS, BUT SCHOOLS OF BUSINESS ARE GAINING GROUND

France's universities continue to attract the great majority of the foreign students in the country (69%). However, over three years, foreign student enrollments in the universities grew more slowly than the average (+10% vs. +16% for all foreign students between 2015 and 2018).

France's business schools are fully engaged in the process of internationalization. As a result, they are attracting growing numbers of foreign students (+70% over three years) and now have the highest percentage of foreign students in the student body (19%)³. Similarly, the country's schools of engineering are now quite internationalized, and 16% of their students, on average, are internationals.

There has also been a strong surge in the number of foreign student enrollments in postsecondary programs delivered in secondary schools (31%). Yet, for the most part, the latter have undergone little internationalization: only 5% of their student body is made up of foreign students.

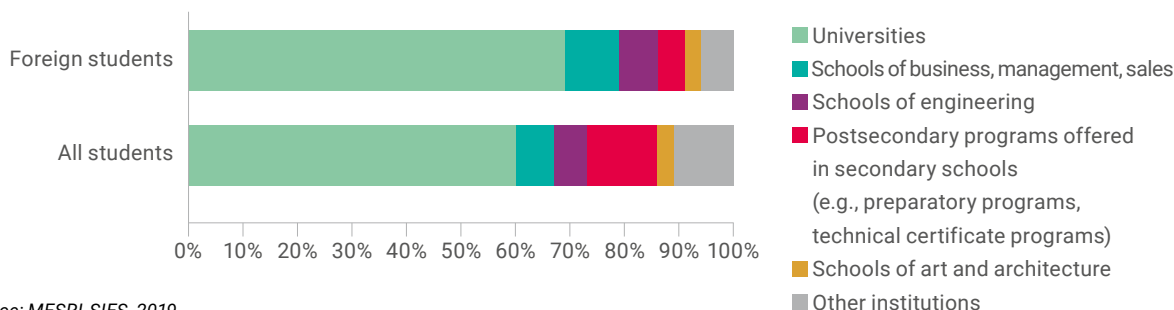


1. *Repères et références statistiques 2019*, MESRI-MENJ, Bureau of Assessment, Forecasting, and Performance, August 2019.

2. This share, based on the number of foreign students in France, differs from the 10% quoted on page 40, which is based on their share in the number of internationally mobile students. For details on the methodology used, see page 58.

3. Because of a change in scope in the SISE survey conducted by MESRI-SIES, the changes in the numbers of foreign students enrolled in postsecondary institutions other than universities, especially schools of business, are slightly overstated.

► Breakdown of foreign-student enrollment and total enrollment by type of institution



SCHOOLS OF ART AND ARCHITECTURE GAIN POPULARITY AMONG ASIAN STUDENTS

Schools of art and architecture enroll just 3% of the foreign students in France, but **their numbers grew 25% between 2015 and 2018, reaching 10,313**. Two-thirds were enrolled in an art school; one-third in a school of architecture.

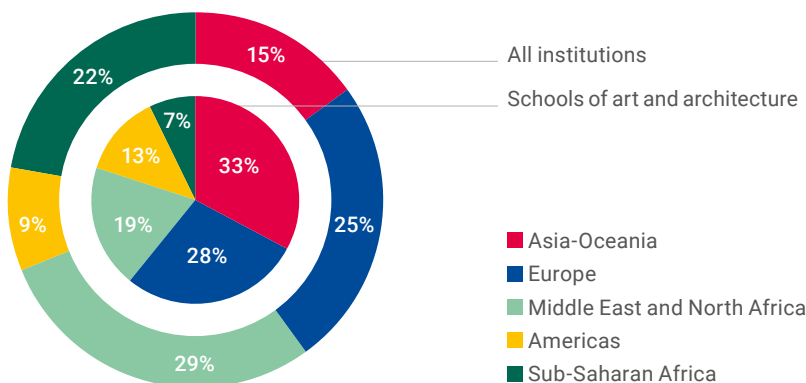
The origins of these students differ widely from those of the body of all foreign students in France. **Asia-Oceania is the leading region represented**; its students make up 33% of the foreign students enrolled in a school of art or architecture, as opposed to just 15% of those enrolled across all institutions. In the opposite direction, schools

of art and architecture claim just 7% of the Sub-Saharan students in France, who constitute 22% of all foreign students.

Chinese, South Korean, and Japanese students together make up just 23% of foreign enrollments in schools of art and architecture. **U.S. students**, on the other hand, are more numerous than in all French institutions combined, constituting the sixth-largest group of foreigners in schools of art and architecture, whereas they rank twelfth for all institutions.

47

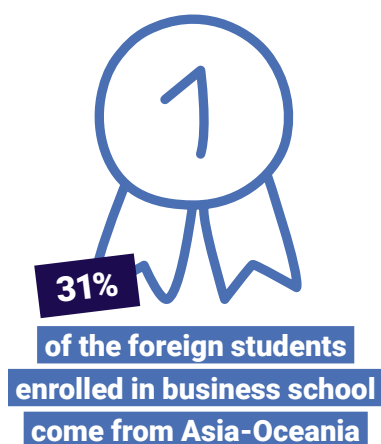
► Breakdown of foreign students by region of origin



Source: MESRI-SIES, 2019.

14%
of the foreign students
in art and architecture
are Chinese

BUSINESS SCHOOLS



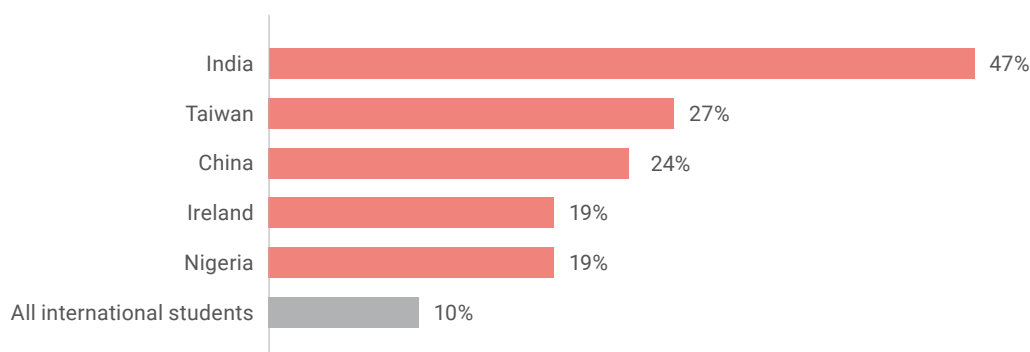
BUSINESS SCHOOLS TAKE A TURN TOWARD ASIA

France's business schools recruit foreign students in a pattern that differs from the national recruitment pattern. Whereas just 15% of the foreign students in France come from Asia-Oceania, **their share rises to 31% in business schools**. The largest sending nations are China (18% of foreign enrollments in business schools), Morocco (14%), and India (7%). In the three years ending in 2018, the number of students from these three nations rose from 956 to 2,603, an increase of 172%.

Some groups favor business schools over other institutional types. This is particularly true for **Indian students: almost one in two is enrolled in a business school**, whereas the proportion for all foreign students in France is just 10%.

► Nationalities most likely to choose business schools over other institutional types

Sample reading: "47% of the Indian students in France are enrolled in a business school."



Source: MESRI-SIES, 2019.

Note: Sample is limited to countries sending at least 500 students to France.

GROWING NUMBERS OF BUSINESS STUDENTS FROM SUB-SAHARAN AFRICA

Foreign enrollment in France's business schools jumped 70% in three years¹, but that growth was unevenly distributed among regions and countries of origin. A notable example: **The number of Sub-Saharan students, who make up 17% of foreign enrollment in business schools, grew by 125% between 2015 and 2018.**

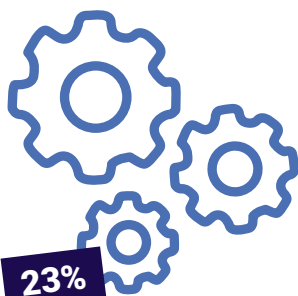
Côte d'Ivoire (+137%) and **Senegal** (+117%) are also sending more students to French business schools than was previously the case. There has also been a large increase in the number of Italian enrollees.



**increase in Sub-Saharan students
enrolled in French business schools
over the past three years**

1. This growth, while real, should be viewed relatively. MESRI's statistical bureau changed the scope of its data collection efforts in 2018. The new practice includes more non-university institutions than it did before.

SCHOOLS OF ENGINEERING



23%
of the Brazilian students
in France are enrolled
in a school of engineering

SCHOOLS OF ENGINEERING RECRUIT

HEAVILY IN THE MIDDLE EAST

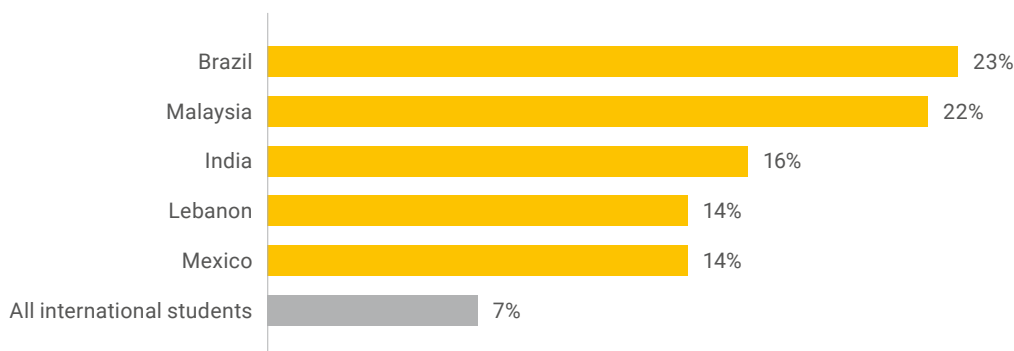
AND NORTH AFRICA

A third of the foreign students enrolled in France's free-standing schools of engineering are from countries in the Middle East and North Africa, and 23% are from Asia-Oceania. Both shares are higher than those the two regions represent in the larger pool of foreign students in France. Similarly, students from the Americas are also proportionally more numerous (12% of the foreign contingent in engineering schools vs. 9% in all institutions combined). By contrast, Europe and Sub-Saharan Africa have proportionally fewer students in engineering schools than they do in all institutions combined (15% and 14%, respectively).

Some nationalities have a disproportionate presence in engineering schools. For example, **23% of Brazilian students** in France are enrolled in schools of engineering, whereas Brazilians make up just 7% of all foreign students in France.

► Nationalities most likely to choose an engineering school over other institutional types

Sample reading: "14% of the Lebanese students in France are enrolled in a school of engineering."



Source: MESRI-SIES, 2019.

Note: Sample is limited to countries sending at least 500 students to France

THE RECRUITMENT PATTERN VARIES BY LEVEL OF DEGREE

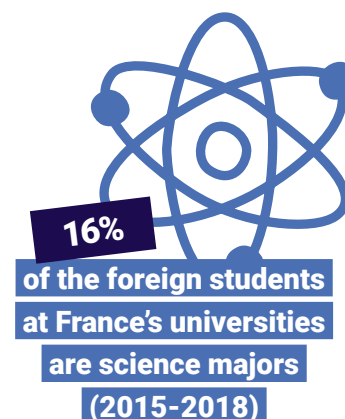
Two-thirds of the 26,216 foreign students enrolled in French schools of engineering are pursuing a master's-equivalent engineering degree (*diplôme d'ingénieur*)². Twenty-one percent are working toward another of France's "national diplomas"—either a licence (bachelor level), master, or doctorate. Ten percent hope to earn an institution-specific degree (as opposed to a degree defined and regulated at the national level). The last 3% are enrolled in integrated preparatory programs.

Some nationalities gravitate disproportionately toward the master's level engineering degree. This is true of students from Senegal (83% of the Senegalese enrolled in schools of engineering are pursuing this degree), Brazil (83%), and Benin (82%). **Relatively high shares of students from India (25%), Côte d'Ivoire (17%), and Mexico (16%) are working toward institution-specific degrees.** Integrated preparatory programs are particularly popular with Chinese and Moroccan students, who together make up 39% of the foreign enrollment in such programs.

2. Programs leading to the *diplôme d'ingénieur*, which is both a degree and a professional credential, are offered by schools that have been accredited by the Ministry of Higher Education and other oversight ministries after an assessment by the French national commission on engineering degrees. These figures do not take into account university-based engineering programs but only those programs offered by free-standing schools of engineering.

FOREIGN STUDENTS AT FRANCE'S UNIVERSITIES

The number of foreign students enrolled in one of France's universities grew by almost 3% between 2017 and 2018 and by 10% over the three years from 2015 to 2018, rates of growth that were lower than that of the number of foreign students overall. Despite this relative slowdown, the universities continue to enroll **more than two-thirds of the foreign students in France**.



► Breakdown of foreign students in France's universities, by degree level

Degree level	2018-2019		Change, 2015-2018	% of total enrollments
	Number	%		
Licence (bachelor)	122,086	49%	+18%	12%
Master	101,330	41%	+4%	17%
Doctorate	23,474	10%	-4%	41%
Total	246,890	100%	10%	15%

Source: MESRI-SIES, 2019.

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GROWING NUMBERS OF FOREIGN STUDENTS AT THE BACHELOR LEVEL

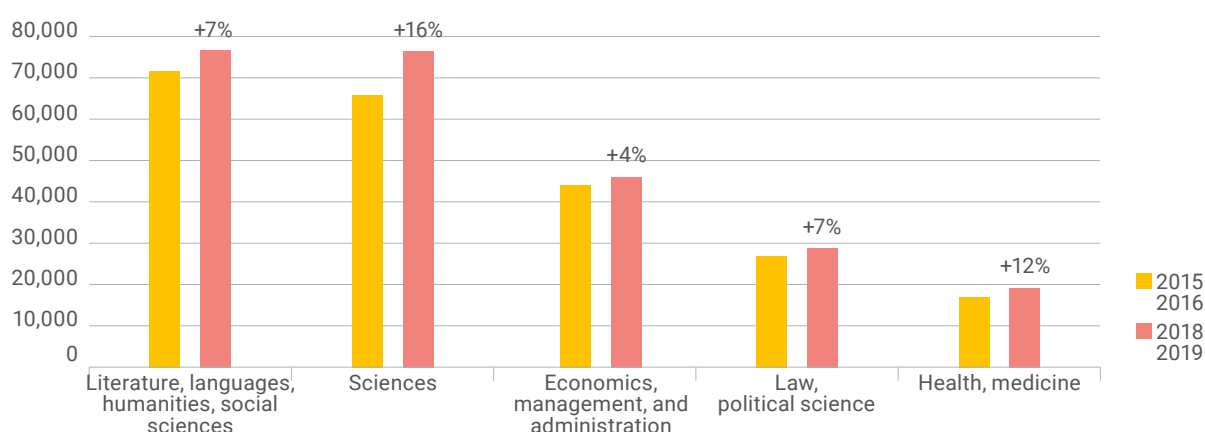
Internationalization is especially noticeable at the master's and doctoral levels, where 41% and 10%, respectively, of France's foreign students are enrolled (as opposed to 36% and 4% of total enrollments, domestic and foreign). Bachelor-level programs, by contrast, attract fewer foreign students. Forty-nine percent of foreign students are in licence programs, vs. 61% of all postsecondary students.

This balance may change, given developments occurring between 2015 and 2018: **foreign student enrollments at**

the bachelor level grew by 18%, accompanied by a drop at the doctoral level (-4%).

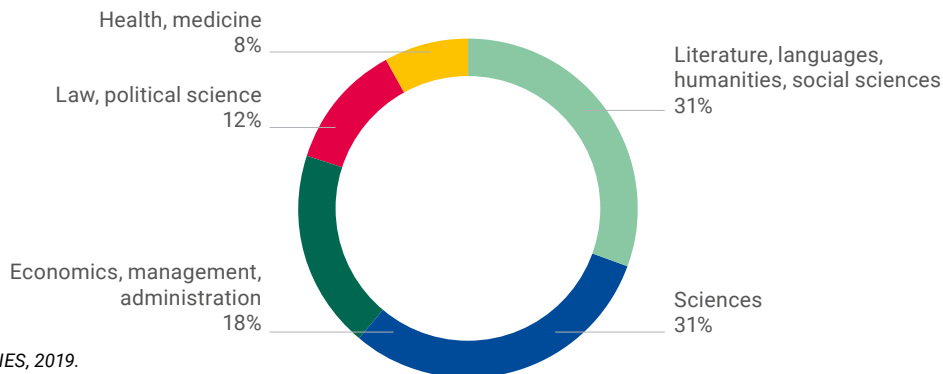
With regard to discipline, **literature, languages, humanities, and social sciences**, as well as the **exact sciences, continue to draw one-third of incoming foreign students**. Enrollments in the sciences were a good deal higher in 2018 than in 2015 (+16%), and the sciences may become the most popular discipline in the medium term.

► Change in university enrollments of foreign students, by discipline (2015-2018)



Source: MESRI-SIES, 2019.

➤ Breakdown of university enrollments of foreign students, by discipline



Source: MESRI-SIES, 2019.

82% OF THE FOREIGN STUDENTS IN FRANCE ARE INTERNATIONALLY MOBILE

The foreign student figures published by the statistical bureau of the Ministry of Higher Education cover several types of students. Thanks to feedback from the universities, it has become possible to quantify these types.

It appears that in 2018-2019, **82% of the 246,890 foreign students at France's universities were internationally mobile**, meaning that they earned their secondary-school credential in a country other than France. Ninety percent of these were pursuing a degree; the rest were engaged in a short-term exchange¹. The remaining 18% of the foreign student body had earned their secondary-school diploma (*baccalauréat*) in France.

➤ Breakdown of university enrollments of foreign students, by mobility category

Mobility category	Number	%
Mobile foreign students	202,151	82%
Degree-seeking	182,256	74%
Short-term exchange	19,895	8%
Non-mobile foreign students	44,739	18%
Total	246,890	100%

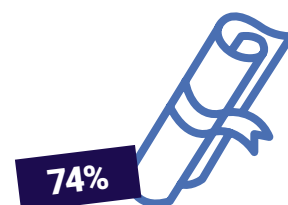
Source: MESRI-SIES, 2019.

DIFFERENT DEGREES AND DIFFERENT ORIGINS, DEPENDING ON MOBILITY CATEGORY

Three-quarters of non-mobile foreign students² are enrolled at the bachelor level. Likewise, most exchange students (51%) are taking undergraduate courses. **A plurality (45%) of the degree-seeking mobile students, by contrast, are enrolled in master's programs.** This same category is also most likely to be found in a doctoral program (12%).

The various mobility categories are also correlated with different origins. Among degree-seeking mobile students, **the prevalence of African students is greater** than in the larger pool of university-enrolled foreign students (56% vs. 49%), whereas students from the European Union are less numerous (13% vs. 19%). The latter are by far the most heavily represented among exchange students (46%), thanks largely to the Erasmus+ program.

Among non-mobile foreign students, the majority are of European (EU and non-EU) or African origin: 43% and 40%, respectively, vs. 26% of the entire pool of university-enrolled foreign students. The largest nationality groups are Algerians (8% of non-mobile, university-enrolled foreign students), Portuguese (8%), Moroccans (6%), and Italians (5%).



of university-enrolled foreign students are internationally mobile degree seekers

1. Mobility within the framework of an exchange program such as the European Erasmus+ program or a partnership involving two or more higher education institutions. For additional detail, consult the methodology on page 58.

2. Foreign nationals who earned their secondary-school diploma (*baccalauréat*) in France.

DOCTORAL MOBILITY IN FRANCE

The doctorate, a standard of excellence recognized around the world, is one of the most serious responsibilities of systems of higher education and research. **France ranks third in the OECD in numbers of international doctoral candidates hosted¹**, behind the United States and the United Kingdom. It is also one of the countries with **the highest proportions of internationals in its doctoral-student population (40%²)**, alongside the United States and the Netherlands.



hosts more international doctoral candidates than all but two other countries

► Top host countries of internationally mobile doctoral candidates

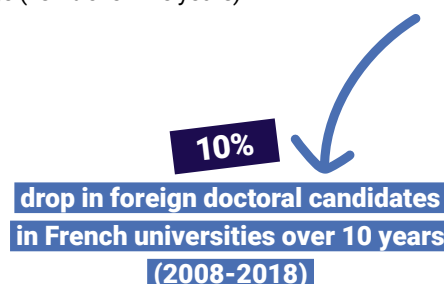
Host country	International doctoral candidates in 2017	As percentage of all doctoral candidates
1 United States	149,635	40%
2 United Kingdom	47,254	42%
3 France	26,532	40%
4 Germany	19,200	10%
5 Australia	18,088	33%

Sources: OECD, December 2019. For the United States: U.S. Department of Homeland Security, Student and Exchange Visitor Information Service (SEVIS), December 2017.

A STEADY DECLINE IN THE NUMBER OF DOCTORAL CANDIDATES IN FRANCE

The marked internationalization of French doctoral training must not be permitted to obscure the fact of **a decline in the number of doctoral candidates in France, including citizens and foreigners**, even as doctoral enrollments have risen almost everywhere else in the world³. Indeed, the number of doctoral candidates enrolled at French universities, numbering 56,836 in 2018-2019⁴, slid by 5% in three years and 8% over five years. Similar declines have been recorded among foreign doctoral candidates (4% in three years; 8% in five). Although the observed drops are partly explained by the shortening of the thesis period, particularly in the exact sciences, there has also been **a reduction in the number of initial enrollments at the doctoral level⁵**.

The decline is observed across all regions of origin. The steepest reduction is in candidates from **the Middle East and North Africa** (-17% between 2013 and 2018). The drop is less marked in the case of candidates from the Americas; doctoral candidacies from Central America and the Caribbean are the only category to show positive change (+31% over five years).



1. OECD, December 2019. Data for 2017.

2. OECD, December 2019. Data for 2017. MESRI's estimate of university-enrolled foreign students is slightly higher (41%).

3. UNESCO, 2019. Between 2013 and 2016, the global pool of doctoral candidates grew 10%.

4. *Repères et références statistiques 2019*, op. cit. A total of 71,159 doctoral candidates were enrolled in French institutions in 2018-2019, of whom 56,836 (80%) were enrolled in universities.

5. 16,800 students enrolled in the first year of doctoral training in 2016-2017, compared with 18,000 in 2011-2012 (counting all doctoral departments). By 2026, total enrollments at university-based doctoral programs are forecasted to be 52,000, compared with 73,500 in 2017-2018.

Source: "L'état de l'emploi scientifique en France," MESRI-SIES, 2018.

► Breakdown of, and change in, enrollments of foreign doctoral candidates at French universities

Region of origin	Candidates in 2018-2019	Share	Change, 2013-2018
Middle East and North Africa	6,768	29%	-17%
Europe	6,126	26%	-4%
Asia-Oceania	4,183	18%	-6%
Sub-Saharan Africa	3,493	15%	-4%
Americas	2,904	12%	-1%
Total	23,474	100%	-8%



Source: MESRI-SIES, 2019.

ENROLLMENTS OF FOREIGN DOCTORAL CANDIDATES

IN THE EXACT SCIENCES ARE HOLDING STEADY

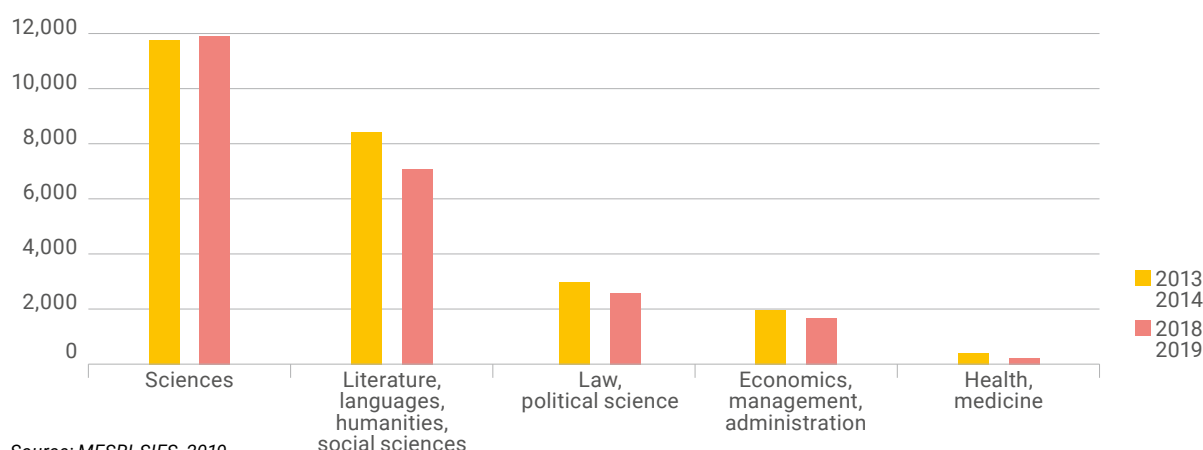
The three largest national groups of foreign doctoral candidates in France are the **Chinese (1,979 enrolled, 8% of total enrollments), Italian (8%), and Lebanese (7%)**. Brazilian candidates are in seventh place; Vietnamese, in eighth. Three countries send a particularly high proportion of doctoral candidates vis-à-vis their numbers at all levels in French universities⁶: Lebanon (37% of Lebanese students enrolled in French universities are doctoral candidates), India (36%), and Pakistan (35%).

The majority of the Indian and Lebanese doctoral candidates in France are working in the sciences (91% and 74%, respectively, compared with all university-enrolled doctoral candidates). Pakistani candidates, by contrast, are heavily represented in economics

(33% vs. 7% of all foreign doctoral candidates). **In the field of languages, literature, humanities, and social sciences, Japanese and South Korean candidates** are disproportionately numerous (72% and 67%, vs. 30% of all candidates).

Among the disciplines, **only in the exact sciences has the number of foreign doctoral candidates risen over the five years under study (+1%)**. Languages, literature, humanities, and social sciences lost 16% of their foreign doctoral enrollments between 2013 and 2018; in health and medicine, foreign enrollments were 40% less than in 2013.

► University enrollments of foreign doctoral candidates by discipline, 2013 and 2018



Source: MESRI-SIES, 2019.

6. Percentages computed for countries sending at least 500 students to French universities.

THE INTERNATIONALIZATION OF FRENCH RESEARCH

In 2017, France ranked eighth in the world in the number of researchers (289,000), behind China (1.7 million) and the United States (1.4 million), and at about the same level with the United Kingdom. In terms of scientific production, in 2018 France lifted itself into sixth place¹. The United States and China account for more than one-third of global scientific publications (680,000 and 470,000, respectively), compared with about 100,000 for France. Following shortly behind France are Canada, Italy, India, and Australia.



► Ranking of countries by number of research personnel (2017)

Rank	Country	Number of researchers	Share	Change, 2012-2017
1	China	1,740,442	20%	+19%
2	United States	1,371,290	16%	+9%
3	Japan	676,292	8%	+4%
4	Germany	413,542	5%	+15%
5	Russia	410,617	5%	-8%
6	South Korea	383,100	4%	+18%
7	United Kingdom	289,674	3%	+12%
8	France	288,579	3%	+10%
9	Canada	155,128	2%	-4%
10	Italy	136,204	2%	+19%
Other countries		2,816,657	32%	+15%
Total		8,681,526	100%	+12%

Source: UNESCO Institute for Statistics, January 2019.

► Ranking of countries by number of scientific publications (2018)

Rank	Country	Number of publications	Share
1	United States	681,111	20%
2	China	472,562	14%
3	United Kingdom	201,198	6%
4	Germany	160,284	5%
5	Japan	115,995	3%
6	France	105,836	3%
7	Canada	105,288	3%
8	Italy	104,994	3%
9	India	102,781	3%
10	Australia	97,802	3%
Other countries		1,197,681	36%
Total		3,345,532	100%

Source: Web of Science, Clarivate Analytics, InCites (an academic information service that tracks scientific publications).

FRENCH RESEARCH: HIGHLY INTERNATIONALIZED

Sixty percent of the scientific publications in France are international co-publications, well above the world average. By way of comparison, the corresponding rates for the United States and China are 34% and 26%, respectively. By volume, France is in fifth place, with 63,000 international co-publications in 2018. France's chief partners are the United States (18,000

co-publications), the United Kingdom (13,000), and Germany (12,000). Although collaboration with French researchers represents just 8% of the international co-publications of the United States, the rate is about 20% for Italy and Switzerland. Nearly one in four articles published in Belgium has a French co-author.

1. Data from Web of Science, Clarivate Analytics, InCites.

➤ Ranking of countries by number of international scientific co-publications (2018)

Rank	Country	Number of international co-publications	Share	Share of international co-publications in total publications of country
1	United States	232,564	16%	34%
2	China	123,619	8%	26%
3	United Kingdom	109,874	8%	55%
4	Germany	87,022	6%	54%
5	France	62,997	4%	60%
6	Canada	56,035	4%	53%
7	Australia	53,903	4%	55%
8	Italy	53,158	4%	51%
9	Spain	45,036	3%	52%
10	Netherlands	37,993	3%	63%
Other countries		595,998	41%	47%
Total		1,458,199	100%	44%

Source: Web of Science, Clarivate Analytics, InCites.

➤ Ranking of countries by number of scientific co-publications with France (2018)

Rank	Country	Number of co-publications with France	Share	Share of co-publications France in total publications of country
1	United States	18,018	11%	8%
2	United Kingdom	12,869	8%	12%
3	Germany	12,291	8%	14%
4	Italy	10,152	6%	19%
5	Spain	7,773	5%	17%
6	Switzerland	6,517	4%	19%
7	Canada	5,873	4%	10%
8	Netherlands	5,680	3%	15%
9	China	5,595	3%	5%
10	Belgium	5,475	3%	24%
Other countries		73,406	45%	11%
Total		163,649	100%	12%

FACILITATING THE MOBILITY OF RESEARCHERS

Several initiatives are underway in France to promote mobility among researchers and to encourage the internationalization of research.

The **long-stay visa marked "talent passport-researcher"** is intended for researchers, research faculty, and doctoral candidates with contracts with private laboratories. It allows the holder to reside in France while performing research work or teaching at a university. **In 2017, more than 6,000 scientific visas were issued to non-European researchers:** 29% of them were for stays of up to three months; 71% for long stays².

The **Hubert Curien Partnerships**, financed by the Ministry of Europe and Foreign Affairs and the Ministry of Higher Education, Research, and Innovation, are bilateral programs to support research projects conducted by two research teams, one French, the other foreign. Designed to encourage new scientific collaboration between France and 54 partner countries, the aid finances the mobility of the research teams participating in the collaborative work. Under the 61 Hubert Curien partnerships managed by Campus France in 2019, **1,333 joint research projects were carried out with the participation of 4,000 mobile researchers.**

The French president's initiative to **Make Our Planet Great Again**, launched in June 2017 in the wake of the U.S. decision to abandon the Paris climate agreement of 2015, is an appeal to the world's scientists and engineers to join France in working toward concrete solutions to climate change. Twenty-one doctoral candidates and 32 post-docs are currently benefiting from the program, which is managed by Campus France.



2. Report on the state of scientific employment in France ("L'État de l'emploi scientifique en France"), MESRI-SIES, 2018, p. 178.

OUTBOUND MOBILITY OF FRENCH STUDENTS

► Top 25 destinations of outbound degree-seeking French students

Country	Number, 2017	Change, 2016-2017	Change, 2012-2017	Rank 2017	Rank 2012
Canada	15,912	+2%	+64%	1	2
United Kingdom	13,089	+8%	+3%	2	1
Belgium	10,621	-37%	+58%	3	5
Switzerland	10,162	+5%	+37%	4	4
Germany	7,057	+1%	+24%	5	6
Spain	7,052	+31%	+217%	6	7
United States	6,487	0%	-19%	7	3
Romania	2,169	-	+75%	8	8
Netherlands	2,044	+20%	+100%	9	11
Italy	1,523	+12%	+28%	10	9
Australia	1,481	-5%	+28%	11	10
Japan	1,039	+49%	+87%	12	13
Luxembourg	996	+1%	+37%	13	12
Portugal	674	+46%	+90%	14	16
Ireland	638	+10%	+39%	15	15
Hungary	577	-2%	+118%	16	21
Denmark	567	-1%	+91%	17	20
Poland	538	+8%	+60%	18	18
Austria	530	+11%	+66%	19	19
Morocco	485	+32%	+782%	20	38
Sweden	482	+10%	-1%	21	14
Argentina	457	+10%	-	22	-
Saudi Arabia	437	+3%	+150%	23	28
New Zealand	318	-5%	-7%	24	17
Brazil	284	-6%	+15%	25	22
Other countries	3,760	+23%	+79%		
Grand total	89,379	-1%	+56%		

Source: UNESCO Institute for Statistics, January 2020.

FRANCE: SIXTH IN THE WORLD IN OUTBOUND STUDENT MOBILITY

Outbound degree-seeking French students favor Europe (68%), and particularly countries within the European Union (56%). One in four heads for North America, usually Canada (18%), followed by the United States (7%). Of the 4% of mobile French students who choose Asia-Oceania, half go to Australia. The other regions

(Africa, the Middle East, and Latin America and the Caribbean) together claim only 3%. **Fifty-nine percent of outbound French students choose a neighboring country,** and 43% choose countries offering instruction in French (Canada, Belgium, Switzerland, Luxembourg, Morocco).

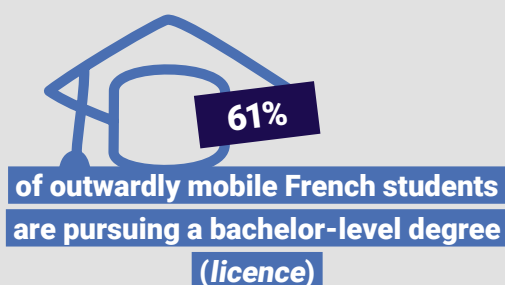
CANADA, THE TOP DESTINATION OF MOBILE FRENCH STUDENTS

For the first time since 2008, **the number of outbound degree-seeking French students dropped (-1%).** The drop is explained chiefly by a 37% decline in the number of French students in Belgium. The imposition of quotas on foreign students in medical and allied health training¹ and a new requirement that applicants to programs in these fields pass an exam to enter the first year explain the change. Until 2016, Belgium was the leading destination for outbound French students; it is now in third place.

Canada is enjoying **a wave of popularity around the world,** with a 126% gain in inbound foreign students between 2007 and 2017. The wave has certainly hit outbound French students (up 226% over the same period), who have made Canada their top destination². The United Kingdom is their second most popular country; the numbers of French students choosing the United Kingdom has risen for three years in a row. **Switzerland as a destination has grown more slowly but more steadily than other countries and now follows closely behind Belgium.**

Among the major hosts of outbound French students, Spain has seen the most rapid growth (+217% between 2012 and 2017). The French make up the majority of foreign students enrolled in Spain's private universities; they are the fourth-largest group in the country's public universities³.

Morocco is an emerging destination for French students. The number of French students there increased nine-fold in five years, thanks to the opening of branch campuses of French institutions in Morocco, the signing of joint degree agreements, and the establishment of research-oriented institutions.

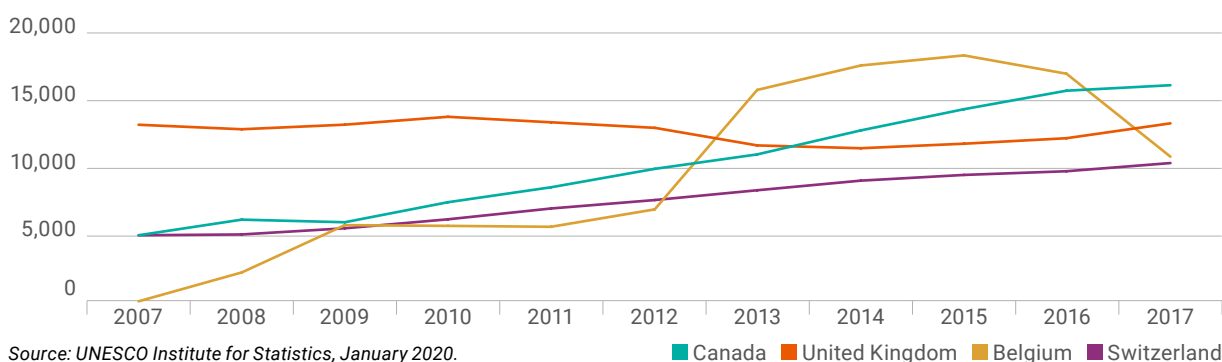


What degrees do French students earn abroad?

The OECD publishes data on the degrees pursued by French students enrolled in member countries (who make up 94% of outbound French students).

The majority (61%) are pursuing a bachelor-level degree; a third (31%), a master. Only 7% are working on a doctorate. The remaining 4% are enrolled in short undergraduate programs.

► Change in the number of French students in major host countries (2007-2017)



1. Dossier Belgique, Les Dossiers no. 43, Campus France, November 2018, p. 9.

2. The other major host country that has shown phenomenal growth in recent years is Australia. But Australia attracted fewer French students in 2017 than in 2016.

3. Spanish Ministry of Science, Innovation, and Higher Education.

METHODOLOGY

In furtherance of its mission to promote French higher education abroad and provide services to foreign students in France, Campus France collects, compiles, and analyzes international and national data on student mobility. That effort is designed to help all organizations and institutions active in mobility to make fully informed plans and decisions.

In preparing this report, Campus France's research unit relied on five sources of data:

- The UNESCO Institute for Statistics
- The databases of the Organisation for Economic Co-operation and Development (OECD)
- The office of information systems and statistical analysis of France's Ministry of Higher Education, Research, and Innovation (MESRI-SIES)
- The European Commission's report on mobility within the Erasmus+ program
- Studies and surveys carried out by Campus France's research unit

Glossary

- **Internationally mobile degree-seeking student**, an expression used and approved by the UNESCO Institute for Statistics and the Organisation for Economic Co-operation and Development. An internationally mobile student is one who crosses a national or territorial border for the purpose of pursuing higher education and who enrolls in an academic program outside his or her country of origin. The origin of the student is determined in the first instance by the country in which the student obtained his or her secondary-school diploma.

Only students whose mobility leads to a degree are counted—that is, students enrolled in a program **leading to a postsecondary degree**. In other words, students participating in exchange programs are not included in this definition.

- **Foreign student in France**. This expression is used by the statistical office (SIES) of France's Ministry of Higher Education, Research, and Innovation (MESRI) to designate students who identify as foreign nationals, are enrolled in a French institution of higher education, and who are enrolled in that institution as of January 15 of the academic year for a period of at least three

months. The definition encompasses distance learning, continuing education, practical training interspersed with academic work, and apprenticeships. Since last year, data provided by higher education institutions to the SISE student tracking system make it possible to divide the overall pool of foreign students at a French university into three categories: students engaged in degree-seeking mobility, students in exchange programs, and foreign students who obtained their secondary-school diploma (*baccalauréat*) in France and who are definitionally not "mobile."

- **Erasmus+ student**. This phrase designates a student participating in an exchange with a university or other postsecondary institution that is a partner in the Erasmus+ program. By completing modules at the host university, students obtain academic credit under the European Credit Transfer System. Those "ECTS credits" are transferred to the student's home institution and applied toward the student's degree requirements.

- **Gross rate of enrollment in higher education**. The number of students enrolled in higher education, regardless of age, expressed as a percentage of the student-age population (18-23 years).

Methodological details

- **The geographic regions used in this report** are those of the French Ministry of Europe and Foreign Affairs (MEAE). According to the MEAE scheme:
 - > Mexico is considered part of Latin America and the Caribbean
 - > Egypt is considered part of the Middle East
 - > Non-EU Europe includes the Caucasus (Armenia, Azerbaijan, Georgia) and Central Asia (Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan)
- In 2018, **MESRI-SIES widened the scope of its data collection net** to include more institutions, notably schools of art and business schools. As a result, some of the reported changes between 2017-2018 and previous years may be overstated. In constant terms, MESRI-SIES reports that the number of foreign students in France grew by 4.5% between 2016-2017 and 2017-2018.

Editorial director

Béatrice Khaiat, director-general of Campus France

Writers

Camille Longépé, Olivier Marichalar,
Guillaume Tétard, Hugo Zusslin

Editorial committee

Florent Bonaventure, Anastasia Iline, Véronique Mathelin

Editors

Véronique Mathelin, Camille Longépé, Olivier Marichalar,
Guillaume Tétard, Hugo Zusslin

Cartography: Philippe Rekacewicz

Graphic design: agencezebra.com

Printing and distribution: agencezebra.com

Translator: Steven B. Kennedy

Campus France :

French agency for the promotion of higher education,
student support services, and international mobility
28, rue de la Grange aux Belles - 75010 Paris
www.campusfrance.org

TOP 20 COUNTRIES OF ORIGIN OF FOREIGN STUDENTS IN FRANCE

	UNESCO 2017			Postsecondary student population (total and % women)	Subtotal in universities	Subtotal in schools of engineering	Subtotal in schools of business and management
	Total number in outbound mobility	Top 5 destinations					
Morocco	51,164	France Germany Ukraine Italy Spain	58,1% 6,1% 5,6% 4,4% 3,3%	41,729 45%	27,394 47%	5,102 33%	5,079 47%
Algeria	25,729	France Saudi Arabia Canada United Arab Emirates United Kingdom	79,6% 1,9% 1,9% 1,5% 1,3%	31,196 49%	27,700 49%	676 32%	839 49%
China	924,768	United States Australia United Kingdom Japan Canada France (8 th)	35,7% 15,0% 12,3% 8,6% 7,4% 2,8%	28,436 63%	14,902 65%	3,668 40%	6,738 72%
Italy	74,268	United Kingdom France Austria Germany Spain	18,0% 13,0% 11,8% 9,3% 9,2%	14,692 60%	10,214 66%	678 29%	1,797 40%
Tunisia	22,352	France Germany Romania Canada Italy	44,0% 19,2% 5,7% 4,4% 4,3%	13,025 56%	9,302 59%	1,452 42%	869 46%
Senegal	12,815	France Morocco Canada United States Saudi Arabia	61,7% 7,3% 7,0% 4,4% 4,4%	12,415 38%	9,698 37%	744 35%	852 52%
Côte d'Ivoire	13,674	France United States Senegal Morocco Canada	40,0% 10,3% 9,6% 9,4% 6,0%	8,924 44%	6,427 44%	325 23%	1,210 50%
Spain	41,361	United Kingdom United States France Germany Netherlands	21,4% 14,1% 14,0% 13,3% 5,3%	8,418 58%	5,773 63%	876 31%	759 50%
Germany	122,195	Austria Netherlands United Kingdom Switzerland United States France (6 th)	68,8% 54,8% 32,0% 27,2% 16,8% 15,5%	8,326 62%	5,652 68%	381 37%	1,239 48%
Cameroon	26,227	Germany France Italy Belgium United States	26,9% 17,9% 9,4% 6,6% 5,2%	7,445 47%	4,435 48%	925 33%	1,123 59%
Portugal	14,039	United Kingdom France Spain United States Netherlands	26,2% 16,0% 11,9% 6,3% 5,4%	6,521 59%	4,295 63%	178 25%	431 54%
United States	86,566	United Kingdom Mexico Canada Germany Grenada France (6 th)	18,7% 12,8% 10,2% 6,6% 5,6% 4,3%	6,422 65%	3,247 68%	173 41%	780 54%
Lebanon	16,929	France United Arab Emirates United States Saudi Arabia United Kingdom	27,1% 9,0% 8,2% 8,1% 6,4%	5,914 48%	4,140 51%	808 30%	503 40%
Brazil	58,841	Argentina United States Portugal Australia France	21,7% 21,0% 13,2% 9,4% 7,1%	5,808 54%	3,617 62%	1,333 30%	278 51%
Vietnam	94,662	Japan United States Australia South Korea France	28,3% 24,5% 16,2% 4,9% 4,8%	5,593 56%	4,107 59%	582 25%	401 72%
India	332,033	United States Australia Canada United Kingdom Germany France (12 th)	43,0% 15,7% 9,8% 4,9% 4,0% 0,9%	5,591 33%	1,489 37%	891 25%	2,603 29%
Congo, Rep.	9,919	France Morocco South Africa India Tunisia	28,4% 12,5% 7,1% 5,2% 4,6%	5,546 47%	4,129 46%	150 30%	374 60%
Russia	56,659	Germany Czech Republic France Germany United States	17,0% 10,6% 17,4% 8,6% 6,8%	5,177 70%	3,731 72%	193 48%	494 67%
Gabon	7,193	France Morocco South Africa Ghana United States	46,7% 12,9% 7,4% 7,1% 5,2%	4,970 52%	3,795 53%	183 30%	479 58%
Belgium	14,992	Netherlands United Kingdom France Germany United States	20,4% 20,4% 18,2% 9,0% 6,1%	4,691 54%	3,228 58%	205 22%	461 45%

How to read the entries in columns 1-4: "In 2017, 51,164 Moroccan students were outwardly mobile in pursuit of a degree, 58.1% of them in France."
Source: UNESCO, 2019 (data on degree-seeking mobility for the year 2017).

How to read the entries in columns 4 to end: "In 2018-2019, 41,729 Moroccan students were enrolled in a French institution of higher education. Of the total, 45% were women.
A total of 27,394 Moroccan students were enrolled at a university; of these, 11,950 (44%) were pursuing a licence and 760 a master's in law and political science."

MESRI-SIES, 2018-2019

	Law, political science	Economics, management, administration	Literature, languages, humanities, social sciences	Health, medicine	Sciences	Total for country and degree levels	% of total at each degree level	
MOROCCO	1,700	8,005	3,614	2,076	11,999	27,394	100%	Morocco
Licence	841	3,564	1,967	654	4,924	11,950	44%	
Master	760	4,267	1,419	1,415	6,419	14,280	52%	
Doctorate	99	174	228	7	656	1,164	4%	
% of total in discipline	6%	29%	13%	8%	44%	100%	-	
ALGERIA	1,297	3,475	7,760	3,006	12,162	27,700	100%	Algeria
Licence	621	1,801	3,976	848	5,465	12,711	46%	
Master	575	1,588	3,431	2141	5,826	13,561	49%	
Doctorate	101	86	353	17	871	1,428	5%	
% of total in discipline	5%	13%	28%	11%	44%	100%	-	
CHINA	321	3,683	5,895	170	4,833	14,902	100%	China
Licence	122	1,899	3,295	60	1,701	7,077	47%	
Master	157	1,701	2,053	102	1,833	5,846	39%	
Doctorate	42	83	547	8	1,299	1,979	13%	
% of total in discipline	2%	25%	40%	1%	32%	100%	-	
ITALY	1,110	1,046	5,050	1,041	1,967	10,214	100%	Italy
Licence	605	658	2,764	358	682	5,067	50%	
Master	414	333	1,538	663	415	3,363	33%	
Doctorate	91	55	748	20	870	1,784	17%	
% of total in discipline	11%	10%	49%	10%	19%	100%	-	
TUNISIA	612	1,231	1,850	1,564	4,045	9,302	100%	Tunisia
Licence	280	493	730	323	1,285	3,111	33%	
Master	240	593	769	1,232	1,976	4,810	52%	
Doctorate	92	145	351	9	784	1,381	15%	
% of total in discipline	7%	13%	20%	17%	43%	100%	-	
SENEGAL	1,461	1,790	2,474	207	3,766	9,698	100%	Senegal
Licence	596	1,031	1,275	67	1,995	4,964	51%	
Master	752	719	1,029	136	1,652	4,288	44%	
Doctorate	113	40	170	<5	119	446	5%	
% of total in discipline	15%	18%	26%	2%	39%	100%	-	
CÔTE D'IVOIRE	1,842	1,809	1,145	251	1,380	6,427	100%	Côte d'Ivoire
Licence	772	1,083	583	70	738	3,246	51%	
Master	903	670	453	180	558	2,764	43%	
Doctorate	167	56	109	<5	84	417	6%	
% of total in discipline	29%	28%	18%	4%	21%	100%	-	
SPAIN	559	607	2,716	498	1,393	5,773	100%	Spain
Licence	347	403	1,541	181	614	3,086	53%	
Master	193	185	978	310	409	2,075	36%	
Doctorate	19	19	197	7	370	612	11%	
% of total in discipline	10%	11%	47%	9%	24%	100%	-	
GERMANY	997	858	2,550	371	876	5,652	100%	Germany
Licence	410	454	1,408	118	382	2,772	49%	
Master	556	367	970	248	247	2,388	42%	
Doctorate	31	37	172	5	247	492	9%	
% of total in discipline	18%	15%	45%	7%	15%	100%	-	
CAMEROON	653	898	788	505	1,591	4,435	100%	Cameroon
Licence	283	433	384	139	671	1,910	43%	
Master	255	414	300	365	798	2,132	48%	
Doctorate	115	51	104	<5	122	393	9%	
% of total in discipline	15%	20%	18%	11%	36%	100%	-	
PORTUGAL	501	757	1,796	374	867	4,295	100%	Portugal
Licence	368	623	1,411	206	606	3,214	75%	
Master	129	126	346	167	157	925	22%	
Doctorate	<5	8	39	<5	104	156	4%	
% of total in discipline	12%	18%	42%	9%	20%	100%	-	
UNITED STATES	340	331	2,121	82	373	3,247	100%	United States
Licence	168	193	1,381	24	139	1,905	59%	
Master	157	124	635	57	146	1,119	34%	
Doctorate	15	14	105	<5	88	223	7%	
% of total in discipline	10%	10%	65%	3%	11%	100%	-	
LEBANON	289	402	544	700	2,205	4,140	100%	Lebanon
Licence	87	110	185	152	294	828	20%	
Master	94	200	197	512	774	1,777	43%	
Doctorate	108	92	162	36	1137	1535	37%	
% of total in discipline	7%	10%	13%	17%	53%	100%	-	
BRAZIL	627	375	1,732	112	771	3,617	100%	Brazil
Licence	314	112	762	40	147	1,375	38%	
Master	231	230	657	64	339	1,521	42%	
Doctorate	82	33	313	8	285	721	20%	
% of total in discipline	17%	10%	48%	3%	21%	100%	-	
VIETNAM	125	1,519	869	192	1,402	4,107	100%	Vietnam
Licence	35	878	651	23	485	2,072	50%	
Master	66	564	143	161	474	1,408	34%	
Doctorate	24	77	75	8	443	627	15%	
% of total in discipline	3%	37%	21%	5%	34%	100%	-	
INDIA	25	195	305	26	938	1,489	100%	India
Licence	11	104	116	5	81	317	21%	
Master	12	73	165	18	361	629	42%	
Doctorate	<5	18	24	<5	496	543	36%	
% of total in discipline	2%	13%	20%	2%	63%	100%	-	
CONGO, REP.	855	941	750	281	1,302	4,129	100%	Congo, Rep.
Licence	570	719	534	115	884	2,822	68%	
Master	236	213	173	165	392	1,179	29%	
Doctorate	49	9	43	<5	26	128	3%	
% of total in discipline	21%	23%	18%	7%	32%	100%	-	
RUSSIA	451	720	1,738	163	659	3,731	100%	Russia
Licence	254	443	942	69	262	1,970	53%	
Master	160	255	618	92	166	1,291	35%	
Doctorate	37	22	178	<5	231	470	13%	
% of total in discipline	12%	19%	47%	4%	18%	100%	-	
GABON	736	814	890	99	1,256	3,795	100%	Gabon
Licence	369	573	486	55	779	2,262	60%	
Master	287	222	249	43	431	1,232	32%	
Doctorate	80	19	155	<5	46	301	8%	
% of total in discipline	19%	21%	23%	3%	33%	100%	-	
BELGIUM	409	336	1,142	687	654	3,228	100%	Belgium
Licence	229	199	667	135	330	1,560	48%	
Master	165	120	382	540	214	1,421	44%	
Doctorate	15	17	93	12	110	247	8%	
% of total in discipline	13%	10%	35%	21%	20%	100%	-	

BIENVENUE

EN

FRANCE



#1 OFFER STUDENTS A RECEPTION IN ACCORD WITH THE HIGHEST INTERNATIONAL STANDARDS

- Simplified, virtualized administrative procedures
- World-class student support services
- Funding to assist higher ed institutions as they expand and improve their support services
- Creation of the Bienvenue en France seal recognizing quality in support services



#3 EXPAND THE FOOTPRINT OF FRENCH HIGHER EDUCATION ABROAD

- New mechanisms to support the partnership projects of French institutions abroad, particularly in Sub-Saharan Africa
- Funding for innovative projects and support for the development of French higher education in Africa
- Deployment of "Partnerships for African Institutions" program

THE TARGET:

500,000

INTERNATIONAL STUDENTS BY 2027



#2 IMPLEMENT DIFFERENTIATED TUITION RATES AND PURSUE AN AMBITIOUS POLICY OF SCHOLARSHIP AND TUITION EXEMPTIONS

- Tuition rates equal to a third of the real cost of education
- Recognition of categories of students to whom the new tuition rates do not apply: doctoral candidates, exchange students, Erasmus+ students, students already in France before the beginning of the 2019-2020 academic year, resident students, refugees, students enrolled in courses to prepare for the Grandes Ecoles entrance exams, students enrolled at branch campuses of partner institutions
- Substantial increases in scholarships and exemptions



#4 STRENGTHEN FRANCE'S DRAWING POWER THROUGH A GLOBAL COMMUNICATIONS CAMPAIGN

- A pioneering global communications campaign to increase the appeal and drawing power of the French system of higher education and research
- Key concept: "What if studying in France could make dreams come true?"
- Let alumni share their story: 12 foreign graduates at the center of the campaign
- Using interactivity to engage students: www.realisetonreve.campusfrance.org

KEY FIGURES

ON STUDENT MOBILITY

IN THE WORLD

222



MILLION POSTSECONDARY STUDENTS IN THE WORLD IN 2017

+45% over 10 years

5.3



MILLION STUDENTS PURSUING A DEGREE ABROAD IN 2017

9 million expected in 2027

TOP 5



HOST COUNTRIES:

- ▶ United States: 984,898
- ▶ United Kingdom: 435,734
- ▶ Australia: 381,202
- ▶ Germany: 258,873
- ▶ France: 258,380

IN THE EUROPEAN UNION

The EU



#1 DESTINATION FOR INTERNATIONAL STUDENTS

1.7

MILLION INTERNATIONAL STUDENTS PURSUING A DEGREE IN THE EU IN 2017

74%



OF EU STUDENTS PURSUING A DEGREE ABROAD STAY WITHIN THE EU

45% CHOOSE A NEIGHBORING COUNTRY



FRANCE AND ERASMUS+

- ▶ #4 HOST COUNTRY
- ▶ #1 SENDING COUNTRY

IN FRANCE

358,000



FOREIGN STUDENTS ENROLLED IN FRANCE

+21% over 5 years

TOP 5



HOSTED NATIONALITIES:

- ▶ Morocco 41,729
- ▶ Algeria 31,196
- ▶ China 28,436
- ▶ Italy 14,692
- ▶ Tunisia 13,025

89,400



OUTBOUND FRENCH STUDENTS PURSUING A DEGREE ABROAD

TOP 3

DESTINATIONS OF FRENCH STUDENTS:

- ▶ Canada 15,912
- ▶ United Kingdom 13,089
- ▶ Belgium 10,621

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