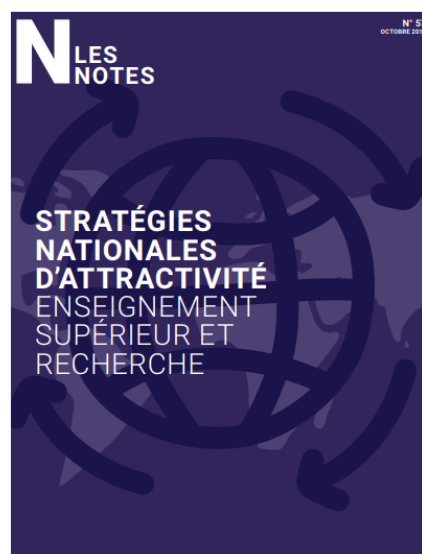


OPENING WORDS

NATIONAL STRATEGIES FOR INTERNATIONAL STUDENT RECRUITMENT IN HIGHER EDUCATION AND RESEARCH



In 2017, more than 5 million students throughout the world were engaged in postsecondary degree studies outside their home country,¹ 25% more than just five years before. These international students represent a growing share (2.3%, up 0.3 points since 2012) of the world's student population. Yet this figure does not represent the full extent of international student flows.² Mobility under exchange programs, language-learning programs, and short academic stays—all of which are growing at a faster pace than degree-related mobility as the internationalization of higher education proceeds—must also be taken into account.

The trend toward internationalization, formerly confined to a small group of countries with a history of global openness, is now being pursued by a growing number of countries. As **competition intensifies**, governments and higher education institutions are adopting strategies to maintain or advance their appeal to mobile students.

France occupies an enviable place on the chessboard. The world's fourth most popular destination for degree-seeking international students and the leading non-English-speaking host country, France also ranks fourth in hosting mobile students under the European Erasmus program. The strengths that make France a favored destination include prestigious institutions, a strong anchoring in the European Union (EU), and an excellent quality of life, among many others. **Yet the country's position is being contested** by neighbors (Germany, Russia), other powerful poles of attraction (China, Canada), and new players (the Netherlands, Saudi Arabia, Turkey).

¹ Retrieved from UNESCO data, September 2018.

² See section on methodology in "Stratégies Nationales d'Attractivité: Enseignement Supérieur et Recherche" (National Strategies for International Student Recruitment in Higher Education and Research), Campus France Note 57, October 2018. https://ressources.campusfrance.org/publi_institu/agence_cf/notes/fr/note_57_fr.pdf



This [Note](#) describes, analyzes, and synthesizes the institutional, conceptual, financial, and operational strategies and tools wielded by the competitors to attract larger numbers of mobile students. Understanding these strategies allows decision makers to think more clearly about France's place within the global higher education market.

THE BENEFITS OF STUDENT MOBILITY

Not all nations strive to attract international students for the same reasons, but their motivations often overlap. The most frequently cited objectives are as follows.

- **To encourage academic excellence** within the country's institutions and to promote a high-level research enterprise aided by the presence of talented international students, scholars, and scientists. Germany and the Netherlands, in particular, explain their recruitment policy in these terms.
- **To attract qualified labor** and address the deficit of workers in countries with an aging population (Japan, Germany). **The development of domestic human resources** through outgoing mobility is a priority for several states (Saudi Arabia, Australia, Japan). With both of these points in mind, the Netherlands has greatly expanded the range of programs taught in English in Dutch postsecondary institutions.
- **To raise institutional revenue** through tuition and fees paid by international students. The financial stability of Australian universities depends heavily on their ability to attract Asian students.
- **To open up a source of income for regions of the country**, a consideration frequently cited in the United Kingdom, the United States, and Canada. The key to Saudi Arabia's internationalization approach is a plan to diversify its human resources in anticipation of a post-fossil-fuel world. In France, international students cost the government approximately €3 billion (primarily in the form of subsidized tuition rates in public institutions), but they contribute about €4.65 billion to the nation's economy.³ Across the Channel, a student from an EU country costs Britain about €21,000 but yields €99,000⁴; the ratio is even higher for students from outside the EU (€8,000 in costs vs. €116,000 in revenues), who pay higher tuition.
- **To advance national interests and reinforce economic ties**, an essential element in many internationalization strategies. Japan is seeking to profit from rapid economic growth in Southeast Asia by recruiting students from the region, and China is developing its influence by promoting a "new Silk Road," which China calls the One Belt, One Road initiative. Australia is orienting its foreign student recruitment policy toward South Asia, consistent with its economic interests.
- **To reap political and geostrategic benefits**, to the extent that student mobility is viewed as an opportunity to project influence and protect political interests. In the

³ "Au-delà de l'influence : l'apport économique des étudiants étrangers en France" (Beyond Influence : The Economic Contribution of Foreign Students in France), Campus France, November 2014.

⁴ "The Costs and Benefits of International Students by Parliamentary Constituency," HEPI, January 2013.



United States, educating foreign students is considered as a way of promoting American values and accomplishing foreign policy goals. Russia, like the Soviet Union before it, uses international educational exchange to maintain its influence over the Community of Independent States and its former satellites. Likewise, Turkey's approach to international education centers on Turkic-language countries and former Ottoman territories in order to extend its influence.

- **To spread use of the country's language** in the interest of wielding soft power, an important consideration for non-English-speaking countries such as France, China, and Turkey. Turkey offers student scholarships contingent on the willingness of the applicant to learn Turkish.
- **To acquire influence among elites and future elites** in other lands, in the model of the United Kingdom, France, and now China, with respect to African students.
- **To promote mutual understanding**, a goal regularly advanced in statements of strategy. The first goal of the Erasmus program, for example, is to construct a European higher education space: exchanges enable students to develop linguistic and intercultural competence. The goal of cooperation is also pursued by France and Germany, which clearly identify it as a benefit.

FACTORS AND SCOPE OF RECRUITMENT

Based on the mix of attractive factors (institutional reputations; cultural appeal; language of instruction; geographic proximity; and historical, economic, or political affinity), a typology of international student recruitment can be discerned, one that operates at **different geographic scales**:

- The United States, Canada, the United Kingdom, Germany, and France (the latter with a substantial African preponderance) welcome **students from all over the globe**, evidence of their global appeal. In such cases, institutional prestige and linguistic criteria are decisive.
- Morocco, Russia, and Australia recruit, for the most part, from **neighboring countries**. The criterion of geography, as well as political and/or economic influence, is predominant.
- Turkey and Saudi Arabia recruit their international students both **from neighboring countries and other friendly countries that share a common history, language, or culture**. These countries deploy a recruiting strategy that is distinct from that of the major host countries and that avoids direct competition with those countries. Turkey, for example, recruits from Turkic-language areas (Central Asia, Caucasus), among Hanafi areas⁵ (Balkans, Asia, Middle East), and in former Ottoman provinces.

⁵ Hanafi is one of the four jurisprudential schools of Sunni Islam. It is strong among non-Arab Muslims and was the official religion of the Ottoman Empire.



- For certain actors that wield economic influence (China) or an historic cultural appeal (Japan), **the recruitment picture is mixed**, with a strong regional base supplemented by recruitment from North America and Western Europe.

As competition intensifies, **political and economic events are shaping mobility flows, or will soon come to do so**. The slowdown in outgoing Chinese mobility, Brexit, and U.S. visa restrictions are prominent examples. Demographic forecasts suggest that the potential for recruitment of mobile students may shift from Asia toward **Africa, where the number of young people of university age is expected to grow substantially between now and 2025**. Higher education planners will thus be called upon to **diversify their recruitment strategies** by focusing on new geographic areas, particularly Sub-Saharan Africa. Growing numbers of African students have been departing for countries such as China, Saudi Arabia, and Turkey, which have taken steps to draw this population.

MEANS OF ATTRACTING

INTERNATIONAL STUDENTS

Given the differences in their history and in the functioning of their postsecondary institutions, countries also differ in how they view recruitment of international students and in how they implement their recruitment strategies.

- **The degree of centralization** of higher education is key. States in the Anglo-Saxon world (e.g., Australia, Canada, the United States, and the United Kingdom) tend to decentralize responsibility for higher education and, if they are federal states, to delegate it to the **states or provinces**. In such states, when it comes to devising tools and strategies for international recruiting, **individual institutions are in charge**. Even so, recent decades have seen a trend toward some centralization, with the development of national standards, promotional campaigns at the national scale, and even cooperative initiatives involving multiple institutions, subnational entities, and/or international partners.
- Where responsibility for higher education remains largely in the hands of central authorities, **institutions tied to the national government or its ministries orchestrate internationalization efforts**, wielding an array of powers that varies from state to state. This is the case in Russia, Italy, the Netherlands, and China. It is also the case, exceptionally, in the Federal Republic of Germany, where DAAD serves as the primary force in international academic mobility.

The means used differ as a function of the specific goals of the recruitment strategy. But all employ the same basic tools to one degree or another:

- **A network of local offices and representatives** of varying density (Education USA, EP-NUFFIC, DAAD). **Cultural or language centers** (such as China's Confucius Institutes and Turkey's Yunus Emre Institutes) pursue a similar strategy of projecting influence through physical presence abroad.



- **Communication campaigns** may be global (e.g., the U.K.'s "Education is GREAT Britain") or rely on the **creation of a trademark or brand** to develop an image and a narrative likely to appeal to students (Australia, Canada).
- **Ambitious grant and scholarship programs**, either to attract the best students to targeted programs (Germany, the Netherlands) or to compensate for the fact that the nation's institutions lack an international reputation (China, Saudi Arabia, Turkey). Individual institutions or foundations may also offer scholarships from their own funds (United States, United Kingdom). The scope of grants and scholarships varies from country to country, covering only tuition in some cases and, in others, full or partial living expenses (housing, transport, medical insurance, support for dependents, etc.). Grant programs make it possible to target certain geographic areas or audiences identified by the government or the institution itself. Grant programs aimed at Sub-Saharan Africa are an emerging phenomenon.
- **Visa policy** can be an important component of a country's appeal (Australia, the Netherlands, Canada). Restrictions imposed on visa issuance have immediate negative effects on recruitment of international students (United States, United Kingdom).
- **Lifting the barriers on residency and employment.** Canada offers graduates the possibility of gaining resident status and a path to citizenship, and the Netherlands has made it easier for students to obtain authorization to work while in school and instituted an "orientation year" during which international graduates can look for a job in the country.

All of these lines of analysis are pursued in greater detail in the [full report](#), enabling readers to gain a better understanding of the circumstances prevailing in the countries that exert the greatest pull in the marketplace of international student mobility, as well as their objectives and the means at their disposal. From the study, it is clear that France occupies a special and strategically favorable place in the market (excellent international image, low cost of study, strong position in Africa). It remains to be seen whether the country will take full advantage of its opportunity to prepare for the major changes likely to affect the sector in the near future owing to the appearance of new players, the rising role of digitally enabled distance learning, the growing presence of overseas campuses, and the increasing role of businesses in providing education.⁶

⁶ British Council, 70 Trends: Transformative Changes in Higher Education, June 2017.

