

Market Intelligence Brief

France



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1 Executive Summary

France is a highly developed nation and is a major political and economic power both within Europe and on the international stage as a permanent member of the United Nations Security Council, NATO, the G-7, the G-20, the EU, and other multilateral organisations including the Organisation for Economic Cooperation and Development (OECD).

France has a large population, estimated at almost 65m, making it the fourth most populous country in Europe. However, as with many advanced economies around the world, its population growth has slowed considerably of late, growing by just 0.1 per cent in each of the last two years. The student age population (15-29) stood at 11.1m in 2021, down marginally from 11.4m ten years earlier. Looking ahead to 2030, the student age population is expected to remain at around the current level.

With a GDP per capita of US\$43,600 (in nominal terms), France is classified by the World Bank as a high-income country. Its economy is dominated by the services sector, which contributes around 80 per cent of GDP. The tourism sector makes an important contribution to the services sector overall, with France having historically been the world's most visited country, with 90m international tourist arrivals recorded in 2019 according to the United Nations World Tourism Organisation (UNWTO). The country also has a significant industrial sector and is a major exporter of aircraft, vehicles, pharmaceutical products, food products (wine), hydrocarbons and electronic components. Looking beyond the weak near-term outlook due to high inflation and energy supply concerns, the medium-term outlook for the French economy remains robust, with annual GDP growth of around 2 per cent per year expected, which is in line with projections for comparable European economies.

Underpinned by healthy levels of government expenditure, France has a world-leading domestic education system, with its higher education system ranked sixth in the world in the 2018 QS Higher Education System Strength rankings. Meanwhile, the country scored better than the OECD average in reading literacy, mathematics and science in the 2018 Programme for International Student Assessment (PISA) results, underlining the quality of its national education system.¹

In terms of international student mobility, France plays an influential role both as a source market of international students and as a host market for international students from other countries. According to estimates from UNESCO, approximately 103,000 French students travelled abroad to study at the higher education level in 2019, making it the world's fifth largest outbound international student market after China, India, Vietnam and Germany. The vast majority of outbound international students from France decide to study elsewhere within Europe (71 per cent in 2019). Canada is also a very popular choice for French international students, with the strong cultural and linguistic links between the countries playing an important role, particularly given France's relatively weak level of English proficiency compared to European standards according to the English First (EF) English Proficiency Index.

¹ PISA tests are taken by students aged 15 and so are not reflective of upper secondary or tertiary education standards

Looking specifically at the UK's recruitment of French international students, the volume of French students at UK higher education institutions (HEIs) has been relatively stable in the 16,000-19,000 range throughout the last decade. However, after peaking at 18,755 in the 2017/18 academic year, the combined sentiment impacts of the Brexit vote and latterly the Covid-19 pandemic have led to three consecutive years of decline, with student numbers down to 17,645 in 2020/21. Looking ahead, the outlook for French international student flows to the UK looks challenging. New students arriving from the EU to start courses from August 2021 are generally no longer eligible for home student status, which means they must pay international fees and will not qualify for government-backed tuition fee loans. Linked to this, there was a sharp decline (40 per cent) in applications for undergraduate study in the UK from EU countries in 2021/22. EU applications for 2022/23 up to the 30 June pre-clearing deadline were down again by a further 18%. Looking at France specifically, application trends over the last two years have been broadly in line with the EU average, down by around 30 per cent in 2021/22 followed by a further decline of around 18 per cent in 2022/23 up to the 30 June pre-clearing deadline. However, study visa issuance data (which includes both undergraduate and postgraduate study) for the first nine months of 2022 show some tentative signs of recovery in recruitment from France.

France has a well-developed transnational education (TNE) offering and had 38 branch campuses across the world in 2020. However, France hosts only 5 branch campuses from other countries, including 3 from the US and 2 from the UK. In the 2020/21 academic year, there were 3,265 French students enrolled on UK TNE and distance learning courses, with a broadly even split balance between bachelor's degrees and taught masters. While this ranks France as a relatively small TNE market for the UK in volume terms, the number of enrolments has been on a strong upward trajectory of late, registering an increase of more than 30 per cent over the last five years. In 2020/21, the majority of provision was via distance learning programmes, which accounted for 54 per cent of the total.

In terms of UK-France cooperation and partnerships in the international education sector, the UK's exit from the EU and subsequent decision to withdraw from its participation in the Erasmus+ scheme came as a blow to student bilateral flows between the UK and France. However, as a replacement to Erasmus, the UK began inviting applications for the Turing scheme in 2021, which will enable UK students to study in other countries around the world, including France. However, the decision not to fund students coming to the UK as part of the Turing Scheme will pose a significant challenge for UK HEIs in not only the French market, but throughout the EU in future. More positively, in the area of research, the *Alliance Hubert Curien* joint initiative between the governments of France and the UK allows early career researchers working in eligible fields to apply for a grant to cover reciprocal mobility and collaboration over a 2-year period. The grants are designed to strengthen current research projects, and to strengthen links for future collaboration between the UK and France.

2 Introduction

This report was produced by the British Council's Insight and Engagement team with external research support provided by Oxford Economics². This report is designed to provide UK education institutions with unparalleled data, insight and analysis to support their international education strategies, recruitment activities and partnership development work. The report is also targeted at a UK and Spanish policy maker audience, by highlighting opportunities and barriers to education and research cooperation that exist between the two countries.

Using the latest data from the most reliable sources, this Market Intelligence Brief represents a window onto France's education system and student population, as well as the economic and demographic factors, policy priorities and developments that shape the country's international education outlook. The report examines various aspects related to the internationalisation of France's education system – including student mobility, transnational education programmes and research collaboration – and also highlights national level education projects and partnerships between the UK and Spain.

The information contained in this report is based primarily on desk-based research and data analysis, supplemented with insight and context provided by British Council colleagues on the ground in Spain.

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Comments, queries and suggestions in relation to this report are welcome and may be submitted to Richard Fleming, Insights Hub lead for the European Union region at email richard.fleming@britishcouncil.org

² www.oxfordeconomics.com

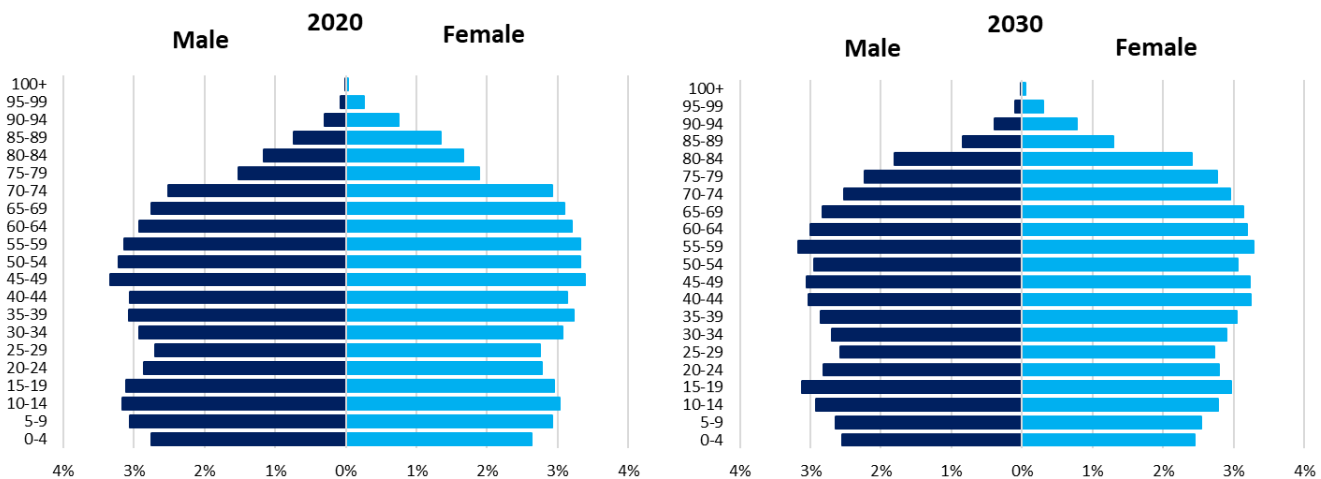
3 Macro Environment

3.1 People

With a population of almost 65m, France is the fourth most populous country in Europe, after Russia (145m), Germany (83m) and the UK (68m).³ In common with many other developed nations around the world, France has seen its rate of population growth slow considerably over recent decades, with annual growth of just 0.1 per cent over the last couple of years, down from much stronger growth of around 1 per cent per year in the 1960 and 1970s. This is despite France having a relatively high total fertility rate at around 1.8, which is well above the rates seen in the likes of Germany (1.5) and the UK (1.6), as well as the high-income country average (1.5). Looking ahead, France’s population is expected to continue to grow modestly until around 2040, reaching around 66m, before beginning a slow decline thereafter.

In the years ahead, the French population is also expected to age considerably. In 2020, the 0-14 age group accounted for 18 per cent of the total population, while the 65+ age group accounted for 21 per cent. By 2030, the 0-14 share is expected to have shrunk to around 16 per cent, while by contrast, the 65+ share is projected to rise to 24 per cent, accounting for almost 1 in every 4 of the French population.

Figure 1: France’s population pyramid, 2020 and 2030



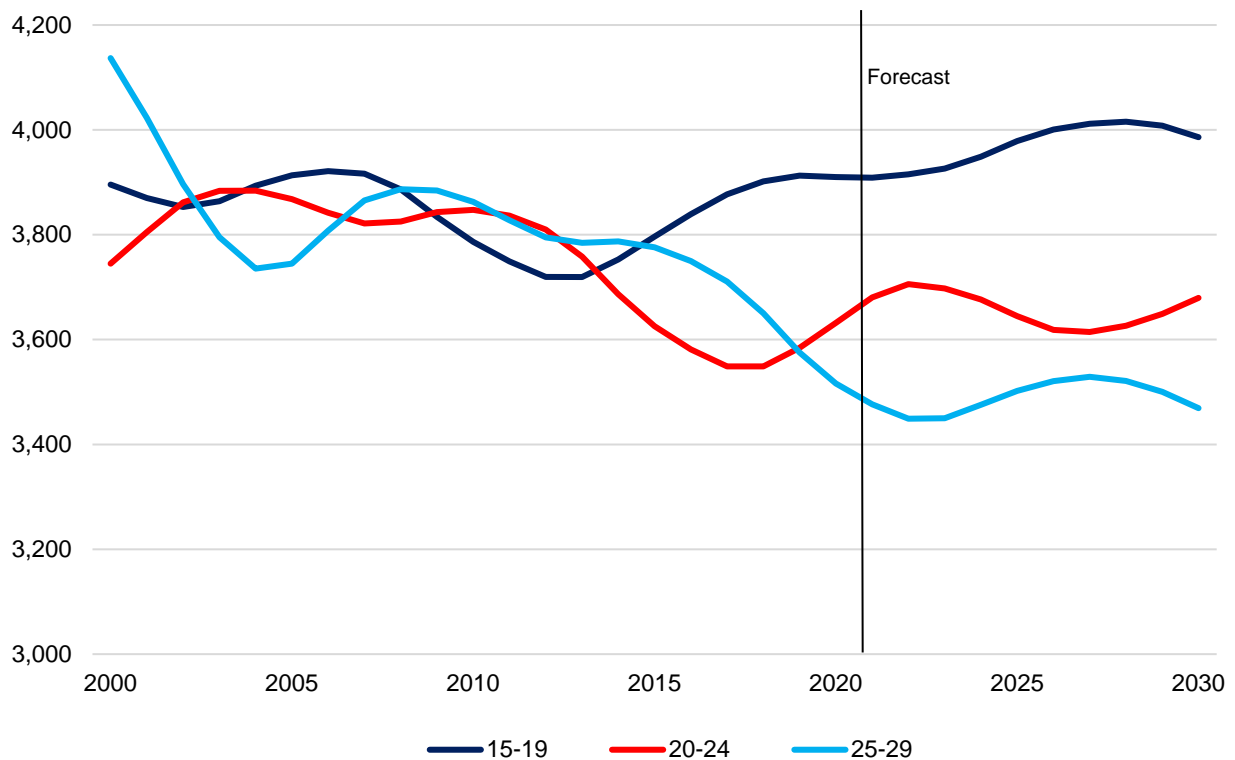
Source: UN Population Division

Looking specifically at the population age bands of interest to UK HEIs, these have shown diverging trends over recent years. The population in the 15-19 age band grew modestly in the mid-2000s, before declining for several years between 2007 and 2013. Since then, growth has resumed and continued expansion is expected until the late 2020s, with a population of just under 4m expected in this age band by the end of the decade. Meanwhile, the 20-24 age band was

³ World Population Prospects, United Nations Population Division, 2022, <https://population.un.org/wpp/>

generally on a downward trajectory from the early 2000s until 2018. At this point, the trend reversed, and population growth resumed for several years to 2022. Continued fluctuation in this age band is expected in the years ahead, with a population of just under 3.7m expected by 2030. The 25-29 age band has seen the sharpest decline over the last couple of decades, contracting from 4.1m in 2020 to just under 3.5m by 2021. Following a projected period of growth in the mid-2020s and a subsequent decline towards the end of the decade, the 25-29 population is expected to remain at around 3.5m by 2030.

Figure 2: France’s student age population (000s)



Source: UN Population Division

According to the UN, approximately 81 per cent of the French population live in urban areas, which is closely aligned to the Western Europe average. Looking ahead, in France the urbanisation rate is expected to rise to just below 84 per cent by 2030, and to 88 per cent by 2050. Much of the population is concentrated in the north and southeast of the country and while there are many urban agglomerations throughout the country, Paris (11.1m) is by far the most populous city, well ahead of the next largest cities of Lyon (1.7m) and Marseille (1.6m).⁴

A strongly secular state, 1 in 3 of the French population do not classify themselves under any religious group. Meanwhile, almost half of the French population is Roman Catholic (47 per cent), with Muslims accounting for the next largest share, at 4 per cent. Indeed, due to its traditional secular stance, the country has not officially collected data on religious affiliation since the 1872

⁴ World cities, *World Population Review*, 2022, <https://worldpopulationreview.com/world-cities>

national census, which complicates assessments of France's religious composition. From a linguistic perspective, almost all of the population speak French, with other regional dialects such as Basque, Catalan and Flemish less commonly used over the last few decades.⁵

According to the English First (EF) English Proficiency Index, France reached the 'high' proficiency level in 2020 and 2021, having been categorised at the 'low' and 'moderate' proficiency levels throughout the decade prior. However, despite the improvement seen during recent years, France ranks only 24th out of 35 European countries in terms of English proficiency and ranks lower than less wealthy countries such as Malaysia, Nigeria and Argentina even though they have lower levels of educational attainment.⁶

3.2 Economy

France was a founding member of both the European Economic Community (EEC), the forerunner to the EU, in 1957 and the European Monetary Union (EMU) in 1992, adopting the euro as a currency in 2002. It is the seventh largest economy in the world and third largest in Europe, after Germany and the UK.

The economy is dominated by the services sector (80 per cent of total output), the share of which has continued to rise over the past decade at the expense of the industrial sector (14 per cent). The main French industrial sectors are the food processing industry, equipment and machinery repairs, the fabrication of metal products, and the chemical industry. The country is a major exporter of aircraft, vehicles, pharmaceutical products, food products (wine), hydrocarbons and electronic components, with its main trading partners being other European nations including Germany, Spain, Italy, Belgium and the Netherlands. France is also a major global tourism destination, and has historically been the world's most visited country, with 90m international tourist arrivals recorded in 2019. Tourism revenues therefore make an important contribution to the French economy and were worth over US\$60bn in 2019 according to the UNWTO.

As with most other countries around the world, the French economy was hit hard by the Covid-19 pandemic, with GDP declining by almost 8 per cent in 2020, strict lockdown measures aimed at curbing the spread of the virus having led to a sharp decline in economic output during the first half of the year. The economy bounced back strongly in the third quarter of 2020 as restrictions were eased but contracted again in the fourth quarter amidst the imposition of a second nationwide lockdown. However, by mid-2021 all domestic restrictions had been lifted, supporting an economic expansion of 7 per cent for 2021 overall, with GDP surpassing the pre-covid peak level by the end of the year. In the labour market, effective job protection measures introduced by the government kept unemployment under control during the pandemic, with the unemployment rate recorded at 7.2 per cent in late 2021, compared to an average rate of 8.2 per cent in 2019 before the pandemic.

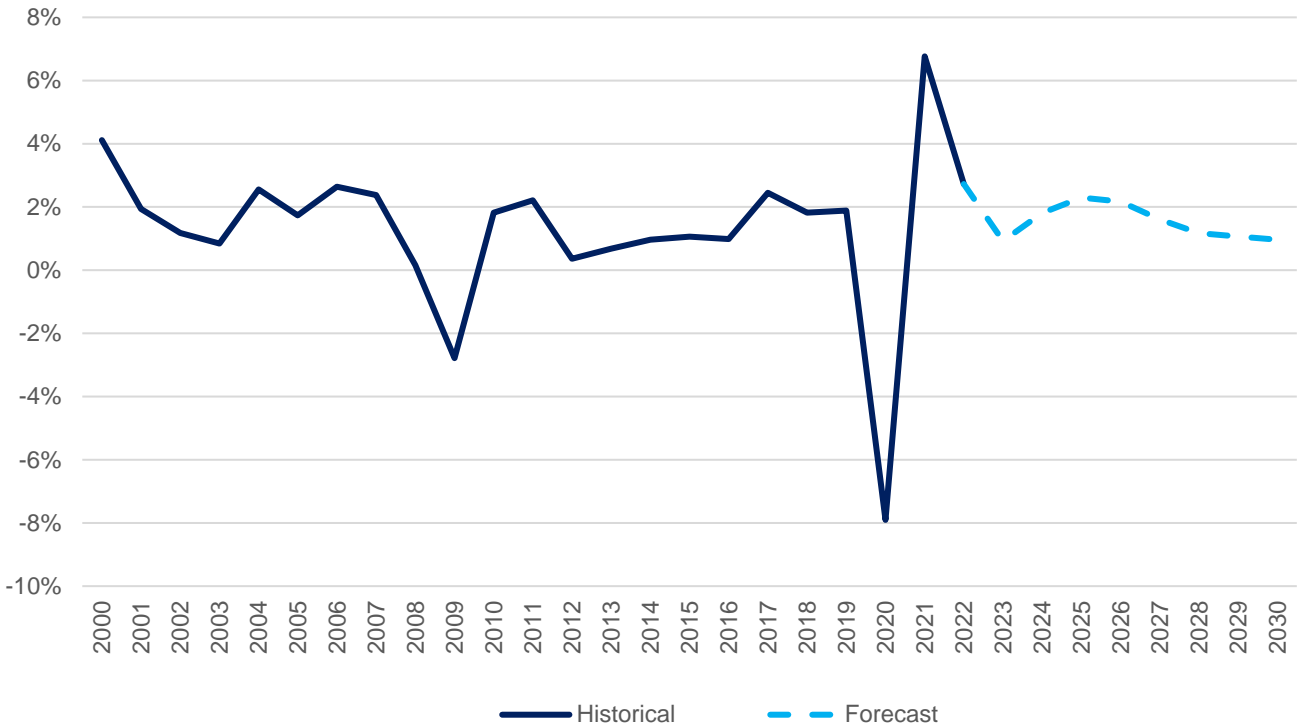
While France's recovery from the pandemic was robust, the near-term outlook is relatively weak amid persistently high inflation, rapidly falling confidence, and energy supply worries over the winter as a consequence of Russia's invasion of Ukraine. Overall, the French economy is

⁵ France, *CIA World Factbook*, 2022, <https://www.cia.gov/the-world-factbook/countries/france/#people-and-society>

⁶ English Proficiency Index, *English First*, 2021, <https://www.ef.com/wwen/epi/regions/europe/france/>

expected to grow by around 2.7 per cent in 2022, with growth slowing sharply towards the end of the year and into 2023, when full-year growth of just 0.9 per cent is expected. Looking to the medium term, France’s economy is expected to grow at an average of around 2 per cent per year, broadly in line with the rates of expansion projected in comparable economies such as the UK, Germany and Netherlands.

Figure 3: France’s real GDP growth



Source: Haver Analytics / Oxford Economics

In 2021, France’s GDP per capita stood at US\$43,600 (in nominal terms), which was slightly ahead of the eurozone average but behind the levels seen in the UK (US\$47,300) and Germany (US\$51,000). By 2030, France’s GDP per capita is expected to rise to around US\$61,000. This will underpin growth in the number of households with an income of US\$35-70,000, up from 13.8m in 2021 to 14.8m by 2030.

After falling against the US dollar in 2018 and 2019 and then recovering somewhat in 2020 and the first half of 2021 to 1.20 dollars per euro, the euro has been on a downward trajectory since, falling to a 20-year low in August 2022, to below parity with the dollar. Aggressive interest rate rises in the US have been one of the factors behind the fall in the euro against the dollar, along with the worsening outlook for the eurozone economy. Oxford Economics expects the euro to tread water in the near term, remaining below US\$1.10 until 2024 at least, before recovering back towards US\$1.20 over the following years. From a student mobility perspective, euro weakness is likely to incentivise intra-EU student flows and is also likely to help eurozone countries attract

a greater number of inbound students from outside the bloc, given the increased affordability of study due to euro weakness.

3.3 Government and Education policy

The political system in France is a semi-presidential representative republic, where the president is directly elected and is head of state. The prime minister is head of government and executive authority rests with the government, while parliament – the National Assembly and Senate – is responsible for passing legislation. Unlike most other European countries, the president is the main political force in France, as he largely determines foreign policy and plays a significant role in setting the direction of domestic policy through his ability to appoint the prime minister.

Since the Fifth Republic, which was instituted in 1958, power alternated between two rather stable coalitions: the centre-right Gaullists (which have changed the party's name several times and is currently "Les Républicains") and the centre-left Socialists. This de facto bipartisan system was undermined in 2017, when outsider centrist Emmanuel Macron defeated far-right candidate Marine Le Pen in the second round. Since then, the two traditional parties have crumbled, with many strong figures leaving either to join Emmanuel Macron, or to the extremes on the far right or on the far left. Overall, France's political landscape has changed drastically since 2017 and is now shaped by three main blocks: the centre "En Marche" party led by Emmanuel Macron, the far-right "National rally" party led by Marine le Pen, and the far-left "France Insoumise" party led by Jean-Luc Melenchon.

Emmanuel Macron was re-elected president in April 2022 for another five-year term. During his first mandate, he had a very ambitious reformist agenda, which aimed to regain competitiveness, address the persistently high unemployment rate and low participation rate, and improve institutions. He is also a fervent defender of further political European integration. But his reform agenda was halted by the *gilets jaunes* social unrest in 2018-2019 and then by the coronavirus pandemic. In his current term, one of his main challenges will be to resume the reform agenda by reforming the pension, education, and health systems. Making his programme greener and more engaged in the energy transition, which was one of the greatest shortcomings in his first mandate, will also be key.

Education in France is administered by the Ministry of National Education (MONE), which oversees nursery, primary and secondary school education in both the public and private sector. All education is freely available at public institutions and as of 2019, education was made compulsory from the age of three to 16.⁷ Higher education is overseen by the Ministry of Higher Education, Research and Innovation (MESRI) which devises and implements education policy and reforms. Following the student riots in 1968, higher education has become more decentralised, giving staff and students more autonomy over the structure of higher education programmes.

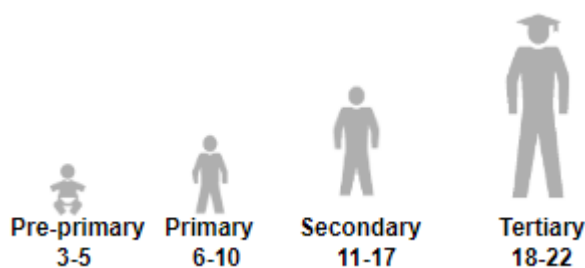
⁷ France to make school compulsory from the age of three, *EuroNews*, 2018, <https://www.euronews.com/2018/03/27/france-to-make-school-compulsory-from-the-age-of-three>

4 Domestic Education Environment

4.1 Overview

The French education system is built around three key stages: kindergarten and primary education, secondary education and higher education, with formal education starting as early as age three. Most French elementary and secondary schools, as well as a large number of universities, are public institutions that have highly centralised administrations. The curricula at primary and secondary schools are standardized across all schools for a given grade.

Figure 4: France official school ages by level of education



Source: UNESCO

According to the latest Programme for International Student Assessment (PISA) results from 2018, France performed better than the OECD average in reading literacy, mathematics and science with scores of 493, 495 and 493 against the OECD average of 487, 489 and 489 respectively. However, socio-economic status explained 18 per cent of the variance in reading performance in France, compared to an OECD average of 12 per cent. Further, in France, a larger share of disadvantaged students have repeated a grade, compared to most other countries and economies participating in PISA. This indicates that while education standards in the country are generally high, outcomes for disadvantaged students remain a significant challenge.⁸

Between 2010 and 2020, government spending on education as a share of GDP averaged around 5.5 per cent, well above the EU average of 4.9 per cent, according to Eurostat.⁹ Meanwhile, as a share of total government expenditure, spending on education has averaged 9.6 per cent over the last decade, which although slightly below the EU average, is closely aligned to the education spend shares seen in comparable economies such as Germany (9.5 per cent) and Spain (9.5 per cent). Throughout the decade, education spending has been remarkably stable, both as a share of GDP and total government expenditure, with the only notable exception seen in 2020 when

⁸ France Student Performance (PISA 2018), OECD, 2018, <https://gpseducation.oecd.org/CountryProfile?primaryCountry=FRA&treshold=10&topic=PI>

⁹ General government expenditure on education, Eurostat, accessed 2022, https://ec.europa.eu/eurostat/databrowser/view/gov_10a_exp/default/table?lang=en

government spending on education as a share of total government spending dipped below 9 per cent as fiscal priorities shifted in the face of the pandemic.

4.2 Early years, primary, secondary

Compulsory education in France starts at the age of three when children attend nursery school / kindergarten, lasting for three years. In 2019, the compulsory education age was changed from six to three, highlighting the perceived importance of kindergarten education for early years development. Nursery education is organised into five key learning areas: language, physical activity, artistic activity, mathematics and exploring the world. In 2020, kindergarten enrollment reached 2.4m across the 13,339 public nurseries and 189 private nurseries.¹⁰ Although not compulsory, increasing school enrolment of children under the age of three is also a priority in France, particularly in schools located in disadvantaged socio-economic environments.¹¹

After nursery education, children progress to elementary school which lasts for six years. Elementary school is split into two cycles (cycle 2 and 3), each lasting three years. During cycle 2 – fundamental learning – students engage in modern language, artistic, physical and civic education. In cycle 3, students consolidate their learning and begin classes in science, technology, history and geography in preparation for college education. In 2021, there were 6.6m students enrolled in pre-primary and primary education (nursery and elementary schools), of which 87 per cent of students were enrolled in public sector institutions.¹²

At the age of 11, students transition to lower secondary school (college) for four years where they complete the last year of cycle 3 and cycle 4. In 2020, there were 3.4m lower secondary school students in attendance at 7,230 schools, with an average class size of approximately 26 students.¹³ In the first year, students are taught to adapt to the organisation and environment of college whilst ensuring that they have developed a sufficient foundation to engage in next stage of education. In the fourth cycle of education students are taught 11 compulsory disciplines, with the option of taking additional courses in language and culture. Core subject areas include French, mathematics, humanities, science, technology, arts, music and physical education. Assessment takes place in two forms – continuous assessment and an end-of-cycle-four examination, both of which contribute to the “National Brevet Diploma (DNB)” or “Brevet”.¹⁴

After completing lower secondary school, students progress to high school, which lasts for a further three years. Although the DNB is not a prerequisite for high school education, it helps students to decide whether they would like to pursue an academic or vocational education pathway, shaping their higher education journey. In 2019, the French high school baccalaureate was overhauled in favour of a more uniform system with specialist options available in the final two years of high school. Under these reforms, the high school streams were replaced by a system where pupils undertake common subjects in the first year followed by two years of more

¹⁰ Kindergarten, *Ministry of National Education and Youth*, accessed 2022, <https://www.education.gouv.fr/l-ecole-maternelle-11534>

¹¹ Presentation of the nursery school, *Eduscol*, accessed 2022, <https://eduscol.education.fr/610/presentation-de-l-ecole-maternelle>

¹² National Education in Figures 2021, *Ministry of National Education and Youth*, 2021, <https://www.education.gouv.fr/l-education-nationale-en-chiffres-2021-324545>

¹³ The College, *Ministry of National Education and Youth*, accessed 2022, <https://www.education.gouv.fr/le-college-4940>

¹⁴ The French National Brevet Diploma, *French International Schools in North America*, accessed 2022, <http://fisna.org/en/scholarship/diplomas-and-certificates/the-french-national-brevet-diploma/>

specialist subjects (general, technical or vocational). High school education is split into two types of lycée - the general/technological lycée and the vocation/professional lycée - dependent on students' DNB scores, skills and higher education choices.

The general/technological pathway provides an academic education suitable to pursue further education at universities, *grandes écoles* or specialised schools. In the first year, both general and technological students are taught the same subjects including French, maths, modern language, history/geography, physics/chemistry, life sciences, physical recreation and information technology. These core subjects are studied alongside a choice of one general and one technological subject. In the second year, students begin to specialise by choosing three subjects under either the 'general' or 'technological' pathway, whilst maintaining a core set of subjects from the first year. In the final year of high school, students continue with all core subjects with the exception of mathematics and French (although these are available as specialist subjects) and drop one specialist subject. The final assessment includes four exams including two written tests, a written test of philosophy and a 20-minute oral exam – this contributes 60 per cent to the final grade. The remaining 40 per cent comprises continuous assessment based on test results throughout the three years of study.¹⁵

4.3 Technical & vocational education and training

Whilst various forms of vocational education are built into earlier stages of the French education system, formal technical and vocational education and training (TVET) is primarily offered at the upper secondary and tertiary education levels.

At the high school level TVET is split into two streams - technical baccalaureate and vocational training - both of which consist of courses lasting for three years. Students who embark on the technical baccalaureate pathway gain training in more specialised subject areas, enabling them to pursue further training qualifications such as the Brevet De Technicien Supérieur (BTS) or the Diplôme Universitaire de Technologie (DUT) as well as higher education at university.¹⁶ There are eight different technological series available ranging from science and technology of industry and sustainable development to hotel and restaurant science and technology.¹⁷

Vocational high schools deliver alternative education for students who wish to pursue a professional diploma or enter the workplace with specialist workplace skills. Vocational programmes consist of a mixture of classroom and workplace training with industry partners. Alongside the practical training received, students are taught French, mathematics, history-geography, science and English.¹⁸

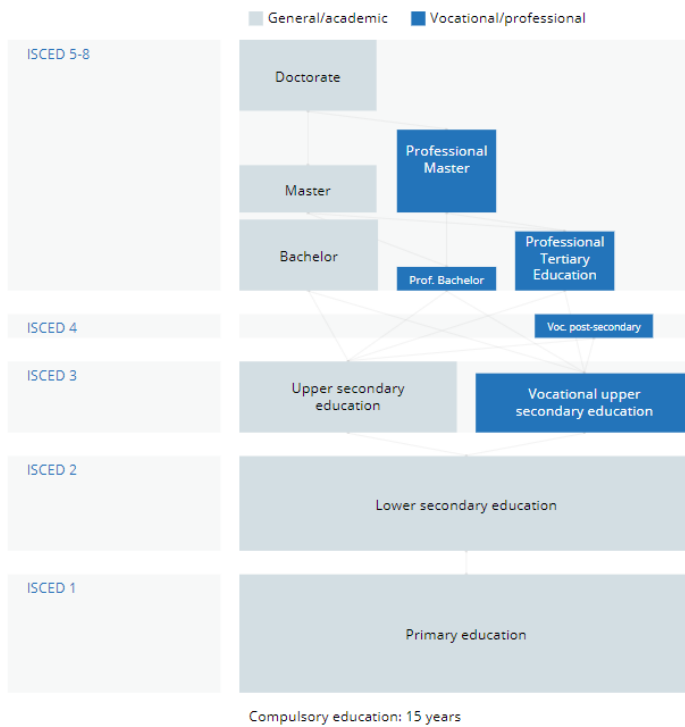
¹⁵ The General Baccalaureate, *Ministry of National Education and Youth*, accessed 2022, <https://www.education.gouv.fr/reussir-au-lycee/la-voie-generale-au-lycee-9749>

¹⁶ BTS and DUT programs, *Campus France*, accessed 2022, <https://www.arabesaoudite.campusfrance.org/en/bts-and-dut-programs>

¹⁷ The technological path to high school, *Ministry of National Education and Youth*, accessed 2022, <https://www.education.gouv.fr/reussir-au-lycee/la-voie-technologique-au-lycee-7574>

¹⁸ The Vocational path in High School, *Ministry of National Education and Youth*, accessed 2022, <https://www.education.gouv.fr/reussir-au-lycee/la-voie-professionnelle-au-lycee-12101>

Figure 6: TVET in the French education system



Source: UNESCO

To support the development of TVET and develop stronger partnerships between educational institutions and industry participants, the MONE introduced “Trades and Qualifications Campuses” across France in 2018.¹⁹ The aim of the campuses is to develop a network of businesses, students and educational institutions to support the economic and social development of the country by training young people, creating new jobs and supporting local businesses.

4.4 Higher education

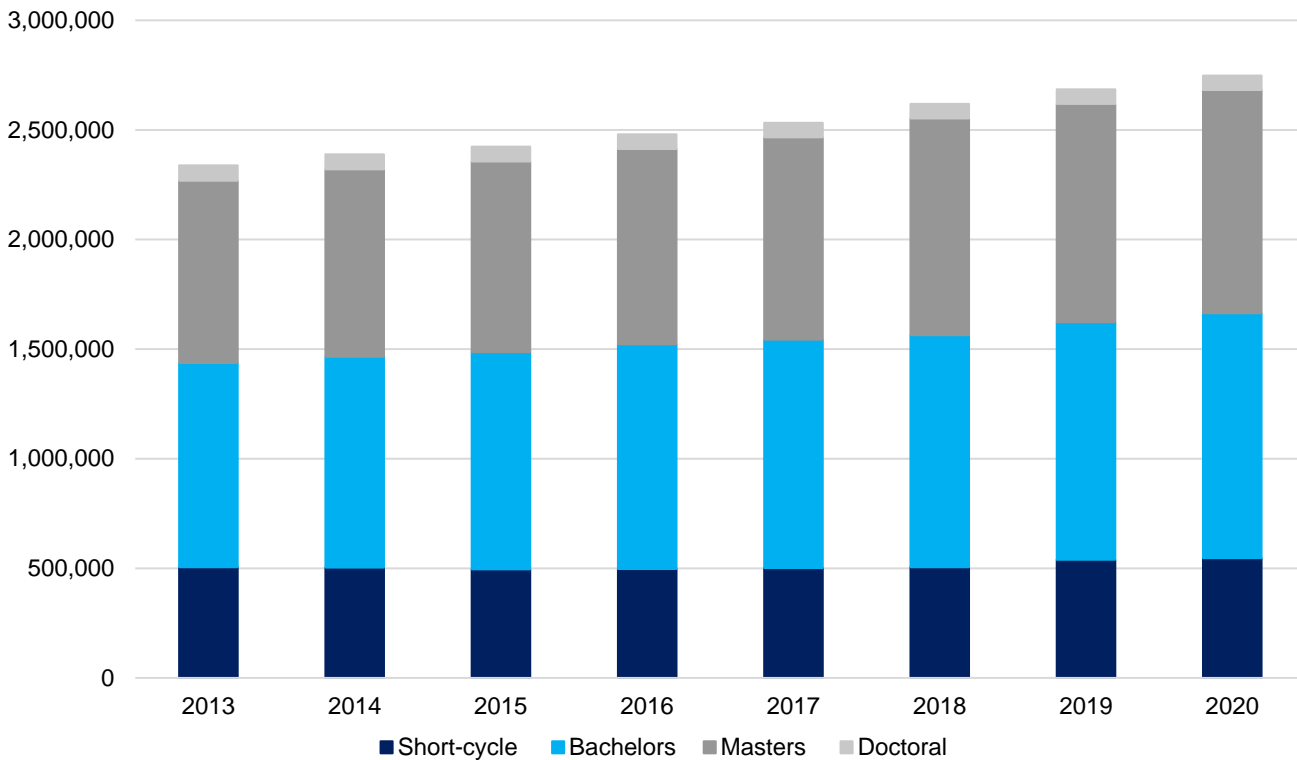
Upon completion of high school, students can progress to the higher education level at a number of different types of HEI in France. The three main types are universities, *grandes écoles* and specialised schools and institutions.²⁰ University study is the most common form of higher education, funded by the French government and offering bachelor’s, master’s and doctorate level education. *Grandes écoles* are highly selective institutions that offer five-year undergraduate programmes in academic subject areas such as engineering, veterinary, politics business and management, with tuition fees typically much higher than for university. In order to be admitted into a *grande école*, students must undertake a two-year preparation course (*Classes Préparatoires aux Grandes Écoles* (CPGE)), which is made available to the top 20 per cent of high school graduates. After the preparatory course, students must then pass the *grandes écoles*

¹⁹ The Trades and Qualifications Campuses, *Ministry of National Education and Youth*, accessed 2022, <https://www.education.gouv.fr/les-campus-des-metiers-et-des-qualifications-5075>

²⁰ The different types of institutes of higher education in France, *Campus France*, accessed 2022, <https://www.campusfrance.org/en/institutes-higher-education-France>

entrance examination.²¹ Meanwhile, specialist schools and institutions offer vocational higher education in subjects such as audio-visual, journalism and fashion. These institutions award both degrees and certificates that last between two and five years.

Figure 7: French tertiary education enrolments



Source: Eurostat

Note: Short-cycle tertiary courses include school and work-based programmes

As of 2020, there were a total of 2.7m tertiary enrolments in France, up consistently year-on-year from 2.3m in 2013.²² In 2020, 41 per cent of total tertiary education students were enrolled at bachelor’s level, 37 per cent at master’s level and 2 per cent on a doctoral degree programme. The remaining 20 per cent of students were engaged in short-cycle courses.

According to Campus France, there are over 3,500 public and private HEIs in France, of which there are 72 universities, 271 doctoral schools, 227 engineering schools, 220 business and management schools, 45 post-secondary public schools of art and 22 schools of architecture. In addition to these institutions, there are around 3,000 private schools and institutions which offer the *sections de techniciens supérieurs* (STS) course or preparation courses for national *Brevet de technicien supérieur* (BTS) or entrance to one the *grandes écoles*. Meanwhile, in recent years, France has attempted to accelerate digital learning by expanding its offering of online Massive

²¹ The French higher education system, *Université de Lorraine*, accessed 2022, <https://ensg.univ-lorraine.fr/international/international-students/the-french-higher-education-system/#:~:text=In%20France%2C%20Higher%20Education%20is,economic%20history%20of%20our%20country.>

²² Education and training, *Eurostat*, accessed 2022, <https://ec.europa.eu/eurostat/web/education-and-training/data/database>

Online Open Courses (MOOCs) and distance learning courses.²³ According to Campus France, there are almost 300 online higher education courses offered by over 80 institutions available on the Digital University France platform with a student enrolment of around 1m.^{24,25}

In France, tuition fees are highly subsidised by the government and therefore fee levels are relatively low by international standards. The cost of a bachelor's, master's or doctoral degree at a public HEI for students from the EU, the European Economic Area, Andorra or Switzerland is €170, €243 and €380 per year respectively. Private institutions are not subsidised by the state in the same way as public institutions and therefore tuition fees are significantly higher, ranging from €3,000 to €10,000 per year.²⁶ In 2019, the French government announced significant reforms to tuition fees for students from non-EU countries as a part of the "Choose France" international recruitment strategy.²⁷ Previously set at €170 per year for an undergraduate degree, students now must pay €2,770, with a higher rate of €3,770 for master's degree courses.

In 2022, five of France's universities were ranked in the world's top 200 universities. According to the QS World University Rankings 2022, the highest-ranking university in France is the *Paris Sciences et Lettres* Research University, which is ranked 44th in the world and 10th in Europe. The next highest-ranking university in France is the *Institut Polytechnique de Paris* (ranked 49th), followed by Sorbonne University (ranked 72nd), *Université Paris-Saclay* (ranked 86th) and *École Normale Supérieure de Lyon* (ranked 130th). For comparison, Germany has 11 universities ranked in the world's top 200, while the UK has 26.²⁸

In June 2022, Emmanuel Macron announced the new roadmap for education, reaffirming the government's commitment to enhancing the quality and attainment of education in France.²⁹ One key feature of the reform is to tackle the lack of teachers by raising salaries by 10 per cent and placing greater importance on the role of academic staff. The President's speech suggested that the overhaul of schools would affect all levels, from kindergarten to high school. To complement this, Macron launched the "National Council for Refoundation" in September 2022, comprising 50 local and national politicians, activists and other stakeholders who are set to address issues such as climate change, education reform and healthcare provision.

²³ Support for students: a priority and a challenge for the future for the State and local authorities, *Senat*, 2022, <http://www.senat.fr/rap/r20-742/r20-7427.html>

²⁴ FUN MOOC, *France Université Numérique*, accessed 2022, <https://www.fun-mooc.fr/en/news/>

²⁵ A diversified higher education offer, *Campus France*, accessed 2022, <https://www.campusfrance.org/en/French-higher-education>

²⁶ Tuition costs in private institutions in France, *Campus France*, accessed 2022, <https://www.campusfrance.org/en/tuition-fees-France>

²⁷ French universities challenge fee hike for international universities, *ICEF monitor*, 2019, <https://monitor.icef.com/2019/02/french-universities-challenge-fee-hike-for-international-students/#:~:text=The%20French%20government%20has%20announced%20a%20fee%20increase,that%20they%20will%20not%20implement%20the%20fee%20policy>

²⁸ Top Universities in Europe, *QS Top Universities*, 2022, <https://www.topuniversities.com/university-rankings-articles/world-university-rankings/top-universities-europe>

²⁹ Emmanuel Macron's new roadmap for education, *Le Monde*, 2022, https://www.lemonde.fr/en/france/article/2022/08/27/emmanuel-macron-sets-an-education-roadmap_5994931_7.html

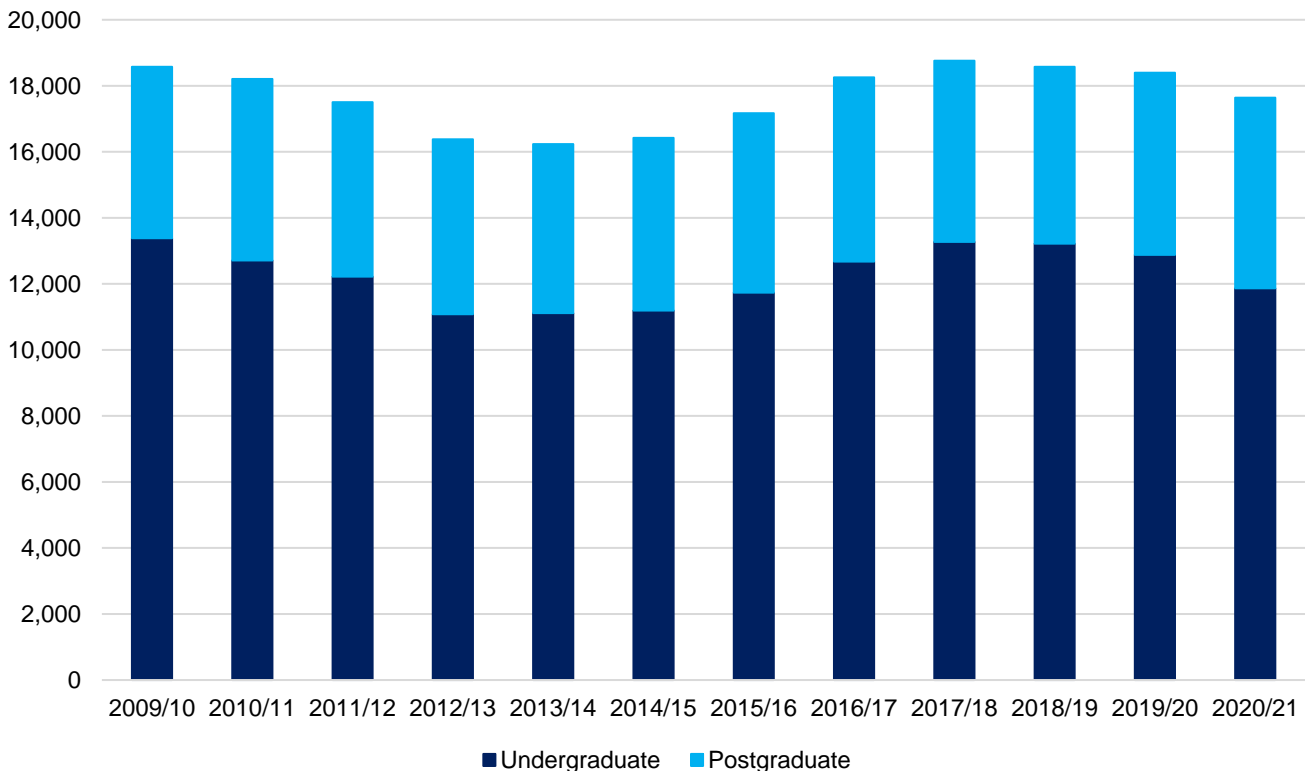
5 International Education

5.1 Student mobility

According to estimates from UNESCO, approximately 103,000 French students travelled abroad to study at the higher education level in 2019, making it the world’s fifth largest outbound international student market after China, India, Vietnam and Germany. Over the last decade, the volume of outbound students has increased consistently, growing by an average of around 8 per cent per year from around 53,000 in 2009, with the volume growing year on year every year since 2008.³⁰

The vast majority of outbound international students from France decide to study elsewhere within Europe (71 per cent in 2019). North America (23 per cent), and in particular, Canada, is a popular choice. In 2019, less than 4 per cent of outbound French students studied in Asia and Oceania, while the other regions of the world (Africa, Middle East, Latin America and the Caribbean) attracted less than 2 per cent.³¹

Figure 8: French students in HE programmes in the UK



Source: HESA

³⁰ UIS Database, UNESCO Institute for Statistics, 2022, <http://data.uis.unesco.org/>

³¹ Key figures on student mobility worldwide, Campus France, 2022

https://ressources.campusfrance.org/publications/chiffres_cles/en/synthese_chiffres_cles_2022_en.pdf

Looking at the UK's recruitment of French international students over the last decade, France has primarily been an undergraduate market for UK HEIs, with almost 70 per cent of enrolments being at the undergraduate level between 2009/10 and 2020/21. The high share of undergraduate enrolments can largely be attributed to the availability and success of the Erasmus scheme. In terms of the volume of French students at UK HEIs, numbers fell moderately in the aftermath of the Global Financial Crisis, from around 18,600 in the 2009/10 academic year down to 17,505 by 2011/12. The volume of inbound French students then fell again following the three-fold increase in UK tuition fees in 2012, with student numbers down to 16,235 by 2013/14. Subsequently, the inflow of students to the UK began to recover from 2014/15 and had returned to the 2009/10 level by 2017/18. Since then, the volume of French students in HE programmes in the UK has been in decline again, falling for three consecutive years to 17,645 in the 2020/21 academic year, with the Brexit vote, followed by the Covid-19 pandemic weighing on student sentiment.

Looking ahead, changes in fee arrangements for prospective international students from EU countries will pose a significant challenge for UK HEIs in the French market. Specifically, new students arriving from the EU to start courses from August 2021 are generally no longer eligible for home student status, which means they must pay international fees and will not qualify for UK government-backed student loans. Linked to this, there was a sharp decline (40 per cent) in applications for undergraduate study in the UK from EU countries in 2021/22. EU applications for 2022/23 up to the 30 June pre-clearing deadline were down again by a further 18%. Looking at France specifically, application trends over the last couple of years have been broadly in line with the EU average, down by around 30 per cent in 2021/22 followed by a further decline of around 18 per cent in 2022/23 up to the 30 June pre-clearing deadline.

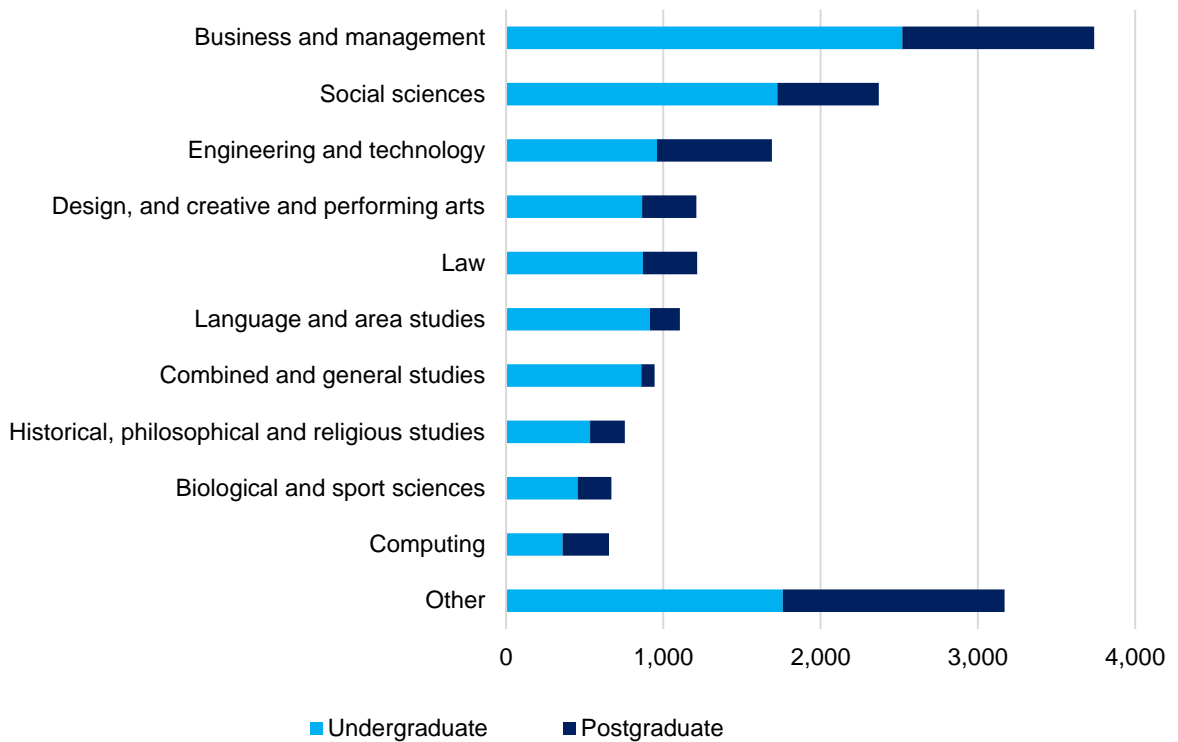
Additionally, in September 2021, the Turing Scheme replaced the Erasmus+ programme in providing funding for participants in UK universities to go on international study and work placements. The decision not to fund students coming to the UK as part of the Turing Scheme will also be a challenge for UK HEIs in not only the French market, but throughout the EU.³²

As 2021 was the first year that EU students needed a visa to study in the UK, 2022 is the first time we can compare year-on-year trends for EU students. For the first 9 months of 2022 there was a 0.8% increase in study visas issued to France.³³ This suggests that the negative impacts of Brexit on recruitment from France (and the EU region in general) are bottoming out, with signs of growth returning to the market, albeit from a far lower base level.

³² International students in UK higher education, *UK Parliament*, 2022 <https://commonslibrary.parliament.uk/research-briefings/cbp-7976/>

³³ UK Home Office data release, 24 Nov 2022 www.gov.uk/government/statistical-data-sets/immigration-statistics-data-tables-year-ending-september-2022

Figure 9: Subjects studied by French HE students in the UK, 2020/21



Source: HESA

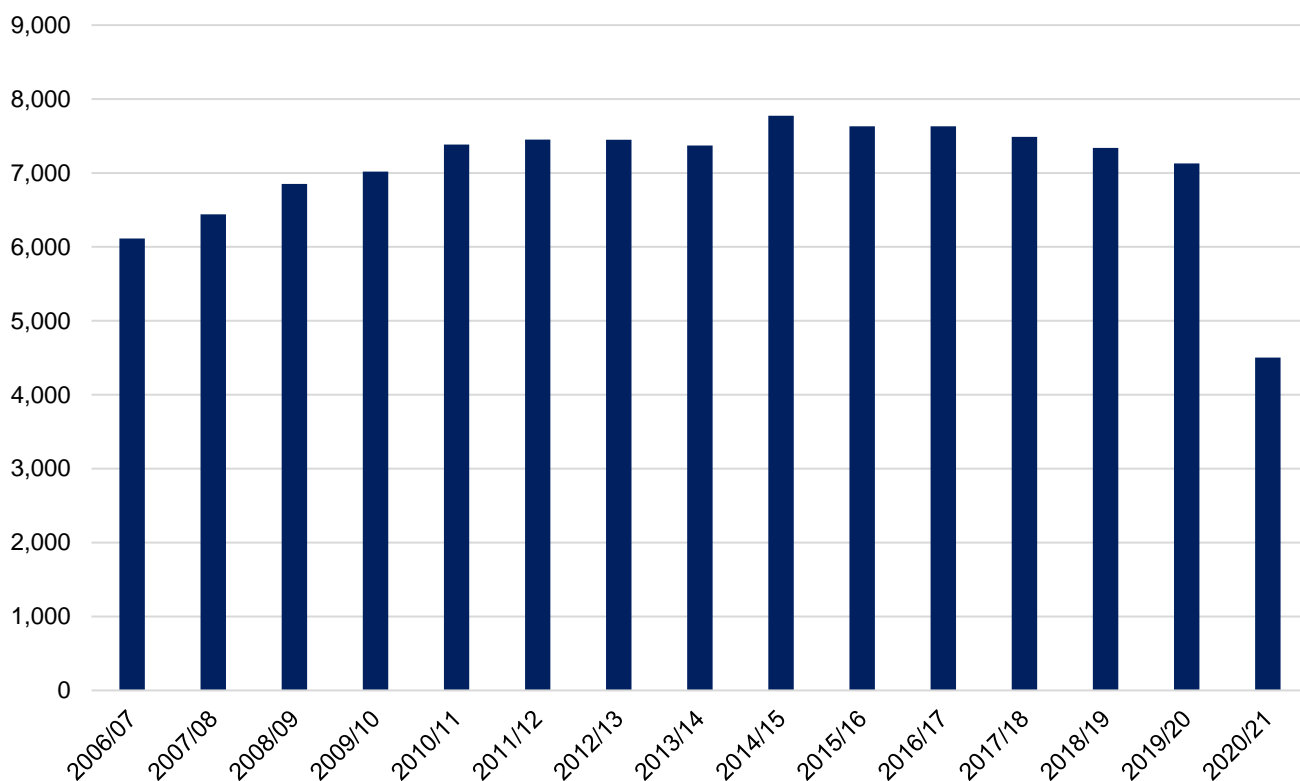
In terms of subject area choices, **business and management** was the most popular for both undergraduates and postgraduates with 2,520 and 1,220 enrolments in 2020/21 respectively. The next most popular subject choices for undergraduates were **social sciences** (1,725), **engineering and technology** (960), **language and area studies** (915) and **law** (870). Each of the top five undergraduate subject choices were included in the top five postgraduate choices, with the exception of **language and area studies**, which was replaced by **design, and creative and performing arts** in the top five at the postgraduate level. Looking back over the last five years, there has been a large degree of consistency in terms of top subject choices for both undergraduates and postgraduates, with **business and management** remaining the top subject choice throughout.

The share of French students enrolled at Russell Group (RG) universities has been on a consistent upward trajectory, increasing almost every year since HESA records began in 2002/03. Specifically, the share of French students at RG universities compared to total French students at UK Universities stood at 25 per cent in 2002/03 and had risen to 36 per cent by 2012/13 and further to almost 47 per cent in 2020/21, meaning that almost half of all French students choose RG institutions when coming to the UK, underlining the importance of institution reputation in their decision-making process.

London has historically been the most popular study region within the UK for French students, accounting for just over a third of total UK enrolments in 2020/21. This was more than twice the share of the next most popular regions, which included Scotland, the South East and the South

West which each hosted around 15 per cent, 10 per cent and 8 per cent of total French students enrolled in the UK respectively. At the institutional level, University College London was the most popular choice for French students in 2020/21 with 1,110 enrolments, accounting for 6 per cent of the total. The next most popular was King’s College London with 980 enrolments, followed by the University of Warwick (625), Imperial College of Science, Technology and Medicine (610) and London School of Economics and Political Science (505).

Figure 10: French HE enrolments in the US



Source: IIE (Note: OPT students excluded)

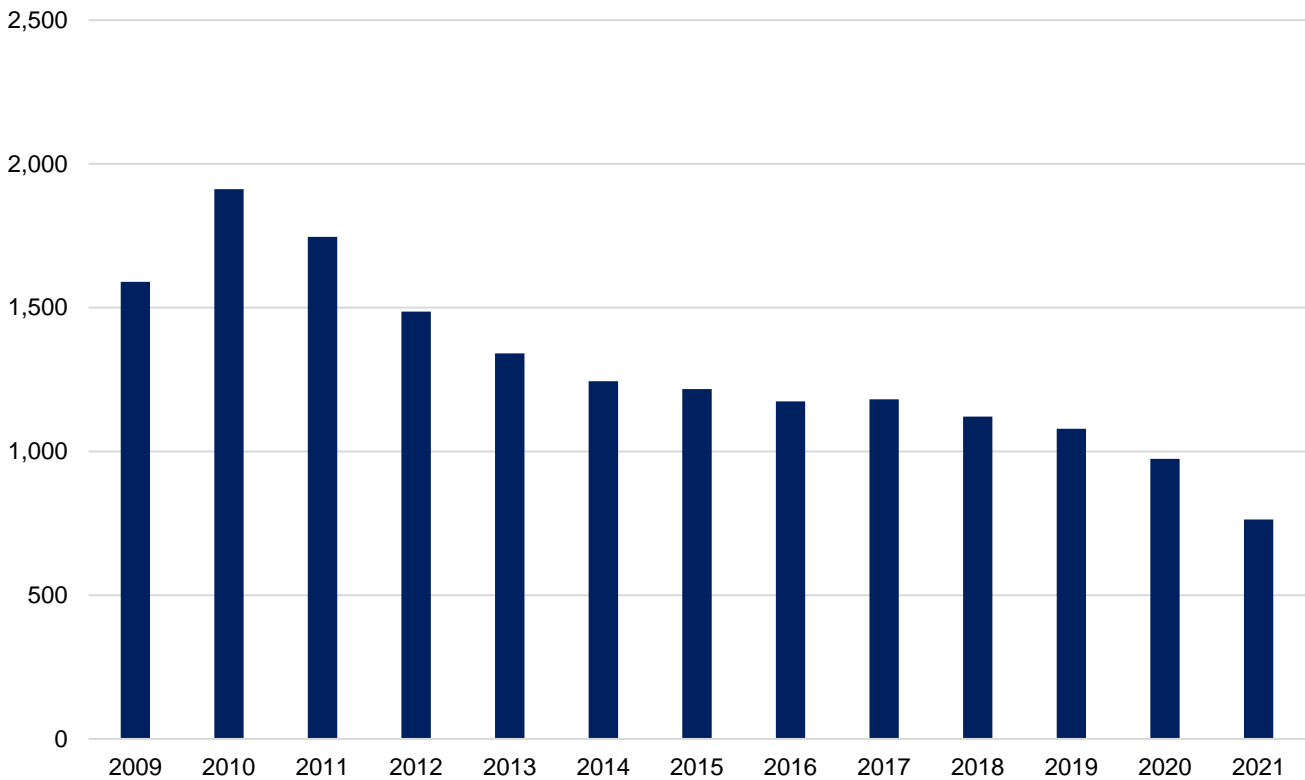
Although not at the same level as Canada, the UK and European markets such as Belgium, Switzerland, Spain and Germany, the US is also a relatively popular destination for French students, hosting more than 7,000 students each year in the decade prior to the pandemic. However, in the 2020/21 academic year, French enrolments in the US fell by 37 per cent, down to just over 4,500, as stringent Covid-19 travel restrictions disrupted student mobility.

According to a study conducted by the US Institute for International Education (IIE), many French students see the cost of studying in the US as a major obstacle, with 87 per cent believing that tuition fees in the US are very high, particularly when compared to the low-cost domestic education system (for public universities) or Erasmus programmes in other European countries.³⁴

³⁴ France – Country Commercial Guide, *International Trade Administration*, 2022 <https://www.trade.gov/country-commercial-guides/france-educational-services-edu>

This underlines the price sensitivity of French students and thus how reluctant or unable many will be to pay international-level fees in the UK. Despite this major challenge, France and the US have expressed their support for the Transatlantic Friendship and Mobility Initiative which aims to double the number of French enrolments at US universities by 2025.³⁵ This, coupled with the provision of a more accommodative student visa environment under the Biden administration, may encourage greater flows of French students to the US in future.³⁶

Figure 11: French HE enrolments in Australia



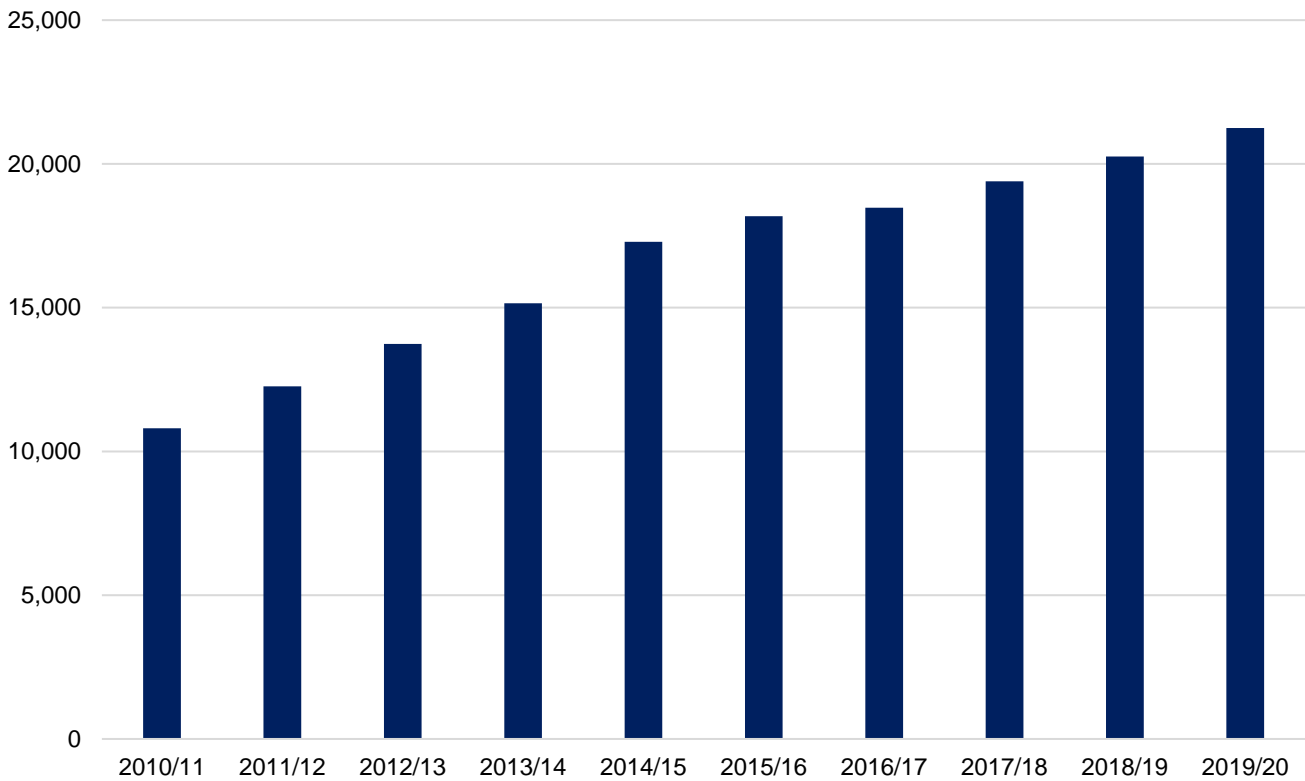
Source: AusTrade

Australia has historically been a relatively small market for international students from France, with flows in the 1,000 - 2,000 range for much of the last decade. In the 2020 academic year, and continuing the downward trajectory seen in the preceding years, enrolments fell to below 1,000. The following year, enrolments fell by a further 29 per cent, down to just 760 as Australia’s highly restrictive international travel restrictions (borders closed from March 2020 to December 2021) weighed on student mobility. Looking ahead, given the large geographical distance between the countries and the relatively high cost of tuition in Australia compared to France, only a modest recovery in student numbers from France to Australia is expected, with European and North American destinations remaining well ahead.

³⁵ France – Country Commercial Guide, *International Trade Administration*, 2022 <https://www.trade.gov/country-commercial-guides/france-educational-services-edu>

³⁶ Four-year international student visa limit reversed, *Study Group*, 2021, <https://blog.studygroup.com/four-year-international-student-visa-limit-reversed-by-biden>

Figure 12: French HE enrolments in Canada



Source: StatCan

Alongside the UK and several mainland Europe markets, Canada has been a leading destination market for international students from France over recent years thanks to the strong cultural and linguistic links between the countries, as well as Canada’s perception as a less expensive English-speaking study destination. Over the last decade, and in contrast to the trends seen in the UK, the US and Australia, the volume of French students studying in Canada has been on a strong and consistent upward trajectory, almost doubling from 10,800 in 2010/11 to 21,200 in 2019/20. Such strong growth in student enrolments enabled Canada to overtake the UK as the leading destination market for French students in 2014/15.

Contributing to its strong performance in the French market, the Canadian government has made a concerted effort to attract international student inflows over recent years, committing almost CA\$150m over five years under the current International Education Strategy (2019-2024).³⁷ The government’s commitment to increasing the volume of international students is also reflected in their accommodative visa environment which enables students to work alongside their studies, improving their exposure to the world of work and making their stay more affordable. Canada’s

³⁷ Building on Success: International Education Strategy (2019-2024), Government of Canada, 2019 <https://www.international.gc.ca/education/strategy-2019-2024-strategie.aspx?lang=eng>

bilingualism also acts as an advantage for the recruitment of French students, increasing students' quality of life and the number of post-study employment opportunities available.³⁸

From an inbound perspective, France is one of the world's leading host markets for international students, welcoming 365,000 international students in the 2020/21 academic year. Morocco, Algeria, China, Italy, and Senegal are the leading origin countries. From a regional perspective, the Middle East and North Africa region is the largest source market (29 per cent), followed closely by Europe at 24 per cent. Meanwhile, over a five-year period, students from Sub-Saharan Africa saw the greatest increase in volumes, at just over 40 per cent growth. Two thirds of international students in France attend a university, with a further 13 per cent at business schools and 8 per cent at engineering schools, while around 5 per cent are enrolled in higher education courses in high schools, such as preparatory classes.³⁹

In 2018, the French government launched the “*Bienvenue en France*” or “Choose France” international education strategy aimed at improving the internationalisation and attractiveness of France as a study destination.⁴⁰ Under this strategy the French government aims to attract 500,000 international students by 2027 through encouraging students to embark on university exchange programs or study at one of France's universities. To achieve this, the government has committed €10m to fund the simplification of visa policies and increase the number of English-taught and French foreign language programmes. To support the Choose France strategy, the government initiated a global communications campaign in 2019 which focused on strengthening bilateral educational relationships and raising the awareness of France as a leading HE destination, particularly for postgraduate studies. As a part of the internationalisation strategy, to ensure the financial sustainability of HEIs, the French government raised international student tuition fees from €170 to €2,770 per year for an undergraduate degree. Fees are now considerably higher, although still well below competitors such as the US, UK and Canada. To mitigate the negative recruitment effects of raising tuition fees, the government announced that it would triple the number of scholarships available to international students, prioritising students from North Africa and Sub-Saharan Africa.

5.2 Transnational education and distance learning

Since the mid-1990s France has established a well-developed TNE offering, with delivery via overseas branch campuses, online distance learning programmes and MOOC courses. Whilst French TNE previously focused on its former colonies, the focus has more recently shifted to the Middle East, Asia and other parts of Europe. Sorbonne University Abu Dhabi was established in 2006 with an initial enrolment of 151 students, growing to 984 students for the 2019-20 academic

³⁸ Choose Canada to Study in French, *EduCanada*, accessed 2022 <https://www.educanada.ca/programmes-programmes/francophonie/index.aspx?lang=eng>

³⁹ Key figures 2022: Student mobility is back – with changes, *Campus France*, 2022, https://www.campusfrance.org/system/files/medias/documents/2022-06/PR_Key%20figures%202022%20student%20mobility%20is%20back%20-%20with%20changes.pdf

⁴⁰ Bienvenue en France / Choose France, *Campus France*, 2018 https://www.indonesie.campusfrance.org/system/files/medias/documents/2018-12/Press_Release_Strategy_international_students.pdf

year. Eligibility for the Sheikh Mohamed Bin Zayed Scholarship scheme has driven growth more recently, accounting for 351 new students at Sorbonne Abu Dhabi in 2020-21.

There are seven French HEIs present in Morocco, composed of four engineering schools and three business schools.⁴¹ The four engineering schools have all gained official recognition from the Moroccan state. Two of them were established in partnership with Moroccan universities, and one was established via a bilateral agreement between the French and Moroccan governments. Five of the seven French HEIs in Morocco are *Grandes Écoles*, elite institutions that are separate from, but parallel to, the French public university system.

As of 2020, France had 38 branch campuses across the world, according to CBERT. China hosts five French campuses including the Asia-Europe Business School in Shanghai, the EMLYON Shanghai campus, the ESMOD campuses in Guangzhou and Beijing and the SKEMA Business School in Suzhou.⁴² *École Centrale Beijing* was established in 2005 as the first French-speaking engineering school in China. The result of a close partnership between the *Écoles Centrales* group (France) and Beihang University (China), this school is an important lever for the development of economic ties between France and China.

Meanwhile, in the UK there are five French branch campuses, all of which are located in London, including the London Campus of Dauphine University, EDHEC Business School, ESCP Europe, Groupe INSEEC London and Toulouse Business School.

The UK maintains two branch campuses in France, via the University of London Institute in Paris and the University of Kent Paris School of Arts and Culture. According to CBERT, the only other country with branch campuses in France is the USA, with three.

In the 2020/21 academic year, there were 3,265 French students enrolled on UK TNE and distance learning courses, with a broadly even balance between bachelor's degrees and taught master's degrees. While this ranks France as a relatively small TNE market for the UK in volume terms, the number of enrolments has been on an upward trajectory of late, registering an increase of more than 30 per cent over the last five years. In 2020/21, the slight majority of provision was via distance learning programmes, which accounted for 54 per cent of the total. At institution level, the Open University registered the largest number of French distance learning students (310), followed by University of London (220), University of Oxford (120) and King's College London (100).

⁴¹ INSA EuroMed Engineering School, EMINES Industrial Management School, Ecole Centrale Engineering School Casablanca, EIGSI Engineering School, emLyon Business School, Toulouse Business School, ESSEC Afrique-Atlantique Business School.

⁴² International Campuses, *Cross Border Education research team*, 2020 <http://cbert.org/resources-data/intl-campus/>

6 UK Cooperation

In the area of research, the *Alliance Hubert Curien* programme is a joint initiative between the governments of France and the UK, which allows early career researchers working in eligible fields to apply for a grant to cover reciprocal mobility and collaboration over a two-year period.⁴³ The grants are designed to strengthen current research projects, and to strengthen links for future collaboration between the UK and France. The six major scientific areas open for proposals are as follows: Mathematics, Chemical and physical sciences, Information and communication sciences, Biological and medical sciences, Environmental sciences, and Social sciences and humanities

In the area of student mobility, the UK's exit from the EU and subsequent decision to withdraw from its participation in the Erasmus+ scheme came as a blow to student bilateral flows between the UK and France. However, as a replacement to Erasmus, the UK began inviting applications for the Turing scheme in 2021, which will enable UK students to study in other countries around the world, including France.⁴⁴ The new scheme will provide funding towards placements and exchanges of students and is open not only to university students but also those in vocational training, apprentices or those who are retraining through a college or school.

In addition to the high-level government-led programmes aforementioned, there are also a range of notable institution-level partnerships between the UK and France:

- In 2018 the French National Centre for Scientific Research (CNRS) partnered with Imperial College London to create the Abraham de Moivre international research laboratory (UMI) with the objective of bringing together the world's best mathematicians. In doing so, France and the UK aim to develop a long-standing relationship in which both nations will benefit from academic collaborations and research partnerships. The UMI will create new opportunities for students as well as facilitate the organisation of joint networks, workshops and conferences within academic fields such as physics, computer science and economics.⁴⁵ The laboratory is at the heart of Imperial's Department of Mathematics and is one of the UK's most highly acclaimed, helping to produce world-leading scientific publications.
- Another key French-British partnership is between the CRNS and the University of Oxford. Established in 1946 via creation of the *Maison Française d'Oxford* (MFO) building in Oxford, both nations have benefitted from strong ties within the scientific community. The building has been occupied by CNRS research unit which acts as a link between Oxford University and French research centres and universities. As well as enhancing academic collaborations the MFO building has provided a hub for academic seminars, conferences and exhibitions.⁴⁶ In 2019, the CNRS, French Foreign

⁴³ The Alliance Hubert Curien Programme, *British Council*, accessed 2022, <https://www.britishcouncil.fr/en/education/research-innovation/collaborations/alliance>

⁴⁴ Turing Scheme: What is the Erasmus replacement? *BBC News*, 2021, <https://www.bbc.co.uk/news/education-47293927>

⁴⁵ CNRS-Imperial Abraham de Moivre international research laboratory, *Imperial College London*, accessed 2022 <https://www.imperial.ac.uk/abraham-de-moivre/about/>

⁴⁶ France and UK strengthen their ties in scientific cooperation, *French Government*, 2019 <https://uk.ambafrance.org/France-and-the-UK-strengthen-their-ties-in-scientific-cooperation>

Ministry and the University of Oxford signed a tripartite cooperation agreement to solidify academic ties and broaden the interdisciplinary scope of the MFO.

- In 2022, the Region of Brittany signed an MoU with 3 Irish Universities: University College Cork, University of Limerick and the National University of Ireland, aimed at strengthening French-Celtic institutional relations as well as establishing a foundation for further academic collaborations with other Celtic jurisdictions. With an initial duration of 5 years and supported by the Brittany Region, it aims to strengthen partnerships in the fields of short-term student mobility, education (joint academic programmes) and research. The region of Brittany is willing to extend this MoU to Welsh and Scottish universities in future.
- In 2022, University Aix Marseille have also signed a MoU with Glasgow University to enhance research collaborations and joint and/or multiple degrees.