

THE FRENCH LANGUAGE WORLDWIDE

overview 2018



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PRÉFACE

This new edition of *The French Language Worldwide* was awaited with great interest. We take this opportunity to take stock of the reality of the francophone world, an area so vast that one could get lost.

This report was originally intended to be a supporting material aimed at sharing knowledge about the French language and its vitality worldwide. But it also provides us with an opportunity to measure, at least partially, the impacts of the interventions of La Francophonie and all the stakeholders responsible for its promotion and dissemination. Mostly, it contains a wealth of relevant information to substantiate research work or provide information about the wide range of linguistic and cultural situations and contexts. They include multiple components and implications in terms of language, symbolic, educational, social, professional, or even media-related, digital, economic, demographic aspects...

Even more so than with the previous editions, this report demonstrates how relevant are our ambitions, our commitments, and how legitimate is La Francophonie in carrying them forward, along with its Member States and Governments.

We are aware of the extent to which the French language resolutely is a powerful nexus to act in solidarity, on all fronts. Indeed, it is a grand language of cooperation, affirmation, socialisation, strategic dialogue, political action and communication at international level. The third language for business and trade, French is also the only language spoken on all five continents along with English; undeniably, it is a creation and innovation language as well. Economics, Sciences and the Information Society are designed, reflected upon and practiced in French on a daily basis. The French language is all at the same time a legal language, a language for instruction, knowledge-sharing, mediation, and research. We refuse the very idea that some fields would be the preserve of a single language, hence of a single way of thinking. We believe that such compartmentalisation is counterproductive. Human genius knows no borders.

We advocate for multilingualism within regional and international organisations. The purpose of this advocacy is to take into account all those people who make plans and express the world in French; listen to their experiences, their views; take advantage of their singular and plural options, the aim of which being more democracy, more spirit of adherence, inclusion and innovation in multilateralism.

Geopolitically and economically, Francophonie is both North and South, East and West. Culturally, it is all at the same time the Creole, Latin, Arab, “Négritude” identities, and so many others. Linguistically, the French language is blossoming on all five continents, nested in an impressive mosaic of cultures and an abundance of other languages – over a quarter of the 6,000 languages still spoken worldwide are practiced in francophone countries.



The ever-growing population of 300 million French-speakers, whose vast majority in many countries is less than 30 years old, represent now more than ever, a force, on all five continents, capable of embodying the will to build, produce, share, create, conceive, innovate, establish bridges, carry forward in solidarity, and collaborate in finding solutions. All of this was made possible thanks to our common language, which brings us together and makes it possible to meet each other.

The reason behind such strength is that, as Léopold Sédar Senghor rightly put it, “Our Francophonie is neither a tower, nor a cathedral; it deepens into the ardent flesh of our time and its requirements”. These founding words now seem obvious to us. There are constantly renewed demands for peace, democracy, rights and freedoms, crisis prevention, human security, the Sustainable Development Goals, and environmental protection. In order to address them, La Francophonie, at the request of its member countries and alongside their populations, implements programmes, plans and strategies unfolded in multidimensional interventions. They are vigorously carried out by teams of men, women and youth, solid networks of experts, all convinced and committed, with a strong emphasis on associating the driving forces from the field and the civil society.

The French Language Worldwide 2018 also puts forward a strategic questioning, a kind of stock-taking of the issues and challenges we face in crucial fields such as investing in human capital; shared growth; inclusive, accountable and sustainable development; education, technical, technological and vocational training for youth and women; their professional integration; their entrepreneurs’ capacities; digital and new technologies; cultural industry and the media. Based on both retrospective and prospective studies conducted in the last two years and the inputs of prominent French-speaking personalities and academics, different prospects have been outlined for La Francophonie.

This edition, and the present Overview, is the result of a partnership with Éditions Gallimard, who provided us with their know-how and extensive experience to complete this work. We trust this book will satisfy the curiosity of the readers and be a pleasant reading.

Michaëlle Jean
Secretary-General of La Francophonie

FOREWORD

With 300 million speakers, up by nearly 10% since 2014, the French language is the 5th most spoken language in the world, after Chinese, English, Spanish and Arabic. Present on all 5 continents, the French language displays all the characteristics of a global language. Along with a few others, and thanks to its status and influence, French stands out in different areas and contexts:

- Official language in 32 States and Governments and most international organisations;
- Language for instruction of over 80 million people, in 36 countries and territories;
- Foreign language learnt by over 50 million people;
- International media language (TV5MONDE, RFI or France 24, as well as Euronews, BBC News, the Chinese CGTN or the Russian RT);
- 4th language on the Internet.

Furthermore, because of the number of French speakers and the economic, demographic and political importance of the settings where it is practiced, the French language is particularly significant in wealth creation, sustainable development and international exchanges at national, regional and global levels.

Finally, thanks to the French-speakers, the French language has become, over the centuries, a melting pot of cultural expressions and linguistic diversity, and one of the matrices of a potential “universal civilisation”, as called for by Léopold Sédar Senghor – a civilisation capable of hosting and enabling a dialogue between multiple identities, thereby reflecting many different imaginations, all spiritualities, and a wide spectrum of symbolic references.

A scientific book, *The French Language Worldwide* primarily intends to be an objective information tool about the presence and practice of the French language

in the major areas of human activity. In doing so, this book explores and seeks to understand many aspects of the French language: the different contexts of its dissemination; the interactions it is part of; the influences it is affected by, and the influence it exerts; its perception by the French speakers...in short, all the complexity attached to language as a polymorphous research topic.

Organised in four parts, this book successively focuses on the following topics:

1. **The Francophones worldwide**, with an introduction of the major challenges related to the future of the daily practice of French, and then the latest estimates of the Francophone population;
2. **Learning and teaching French**, with a state of play and regional and country analyses, along with studies about dissemination networks and tools, the digital training offer, and the official certifications;
3. **The economic Francophonie**, combining a macroeconomic approach about the importance of the Francophones and their exchanges, especially in the sector of creative industries, and a microeconomic approach about the added value of French as a language for employment;
4. **The outreach of the French language in international media and on the Internet**, where, according to two studies, it was ranked 4th, after English, Chinese and Spanish respectively.

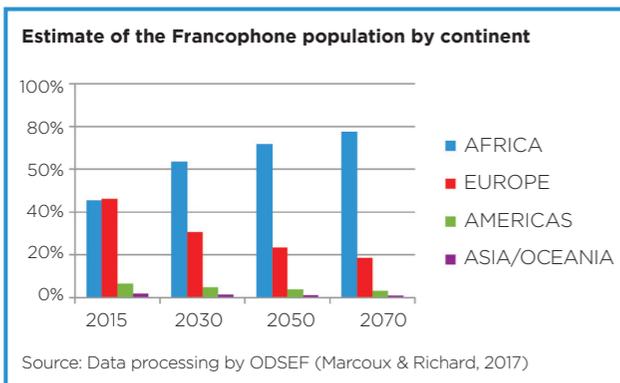
This overview outlines the main thematic areas that have been addressed and reviewed in the book to be published in 2019 by Éditions Gallimard.

PART 1

THE FRAN- COPHONES WORLDWIDE

THE PRACTICE AND FUTURE OF THE FRENCH LANGUAGE

59% of those who speak French every day live on the African continent. Therefore, the various relevant factors that demonstrate the vitality of the French language; the reality of its practice in the multilingual contexts in which it is mostly found nowadays; and the challenges that hinder its potential rise (in terms of education, standards, performance and symbols) shall be reviewed specifically in several countries of Sub-Saharan Africa, the Maghreb and Lebanon.



The primary conditions for expanding French in these territories relate to demographics and education. Both topics have therefore been carefully reviewed and the following highlights were found:

- The Francophone area benefits from the African demographic growth;
- Despite significant progress in the recent years, it is very difficult to overcome the challenges related to education in French and in good conditions. Indeed, on the one hand, in Sub-Saharan Africa only, over 30 million children are still not attending school; and, on the other hand, the studies conducted by PASEC¹ revealed that 71% of the children enrolled in Grade 2 do not have a level of French that is sufficient to understand a clear information provided orally or the meaning of a series of words in writing;
- Among the priorities are the efforts undertaken for training school teachers and the deployment of bi/multilingual teaching schemes, the efficiency of which was demonstrated by the results of La Francophonie IFADEM and ELAN programmes;

¹ PASEC 2014 – Performance of Educational Systems in Francophone Sub-Saharan Africa: Skills and Success Factors in Primary School

- Thus, the different projective scenarios relating to the French-speaking population in 2070 remain open: between 447 million and 747 million French speakers.

Additionally, with regards to the practices of the speakers, there are other conditions that relate to their degree of ownership of the French language. It depends on several factors: usefulness of French, coexistence with the national languages, the fields in which French is used, intergenerational transmission... These factors may be presented in the form of questions. To what extent is the French language present in the language interactions at home, depending on the interlocutors and the generations involved? Is it regarded as a language of cultural heritage and transmission tools, in which case it should be preserved and perpetuated? How is it regarded by the Francophones for whom it is not yet the first language of socialisation – a language sometimes said to be “secondary” or “African” (if not by origin, then by ownership)? How to address the issue of the diversity of the French language, which spreads out as fast as the French speakers’ creativity and needs?

Some positive trends could be established based on the surveys² conducted in Sub-Saharan Africa, the Maghreb and Lebanon, and their reviews:

- Most of the French speakers from Africa are multilingual. The extent to which a national language is practiced depends on the number of languages available and the operational distribution assigned to them. Dialectical Arabic in the Maghreb and Lebanon, Wolof in Senegal or Bambara in Mali, for instance, are languages that are massively practiced as a first choice, while in Côte d’Ivoire or Gabon, no other language clearly stands out (apart from French, precisely).
- Everywhere, sometimes even before the national languages, the presence of French is unrivalled by any other foreign language: French always ranks at least 2nd, whatever the context is (at home, at school, at the workplace, in recreational activities...);
- These trends are getting stronger and stronger. Indeed, the youngest generations have intensified their practice of French in comparison with those before them;
- Simultaneously, various forms that originate in the French language or combine it with other languages (nouchi in Côte d’Ivoire, toli bangando in Gabon, for instance) are developing and being used. Acknowledging

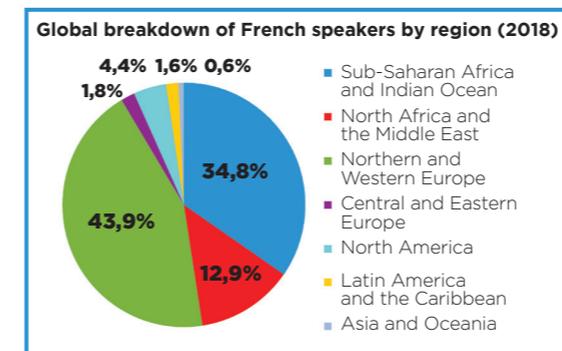
² TRANSLANGA and DUFRAM, commissioned by the AUF and OIF.

and including them is key to the future of the francophone area (we will further address the distinction between francophonie without a capital letter, which refers to the linguistic reality, and Francophonie, the institutional meaning that refers to the International Organisation of the same name and all its Member and Observer States and Governments);

- It is difficult for the image of the French language to liberate itself from the colonial past while being comfortably settled in the minds of its speakers as a school language, a modern, useful language for employment and sometimes for business. Either way, French is never regarded as being declining nor complicated or reserved for the intellectuals;
- 80 to 100% of the French speakers of Africa and the Arab world wish that their descendants learn French;
- 40 to over 80% express the will to directly transmit French to their children (or their future children, for the youngest ones).

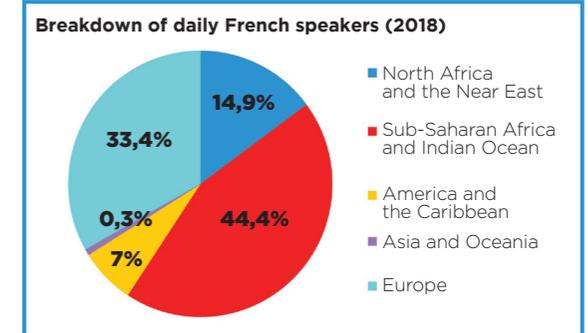
AN ESTIMATE OF THE FRENCH-SPEAKING POPULATION WORLDWIDE

With 300 million French speakers worldwide in 2018, the number of Francophones rose by 9.6% since the last measurement that was made in 2014.



■ The French-speaking galaxy

It is worth keeping in mind the various relationships that the French speakers have with the French language in the different territories where it is found. Thus, the vital core, which attracts and drives others, is made of those who “were born and also live in French”.



Proposed four years ago, this concept proves useful in establishing categories, thus enabling argumentation and knowledge-sharing, without freezing an ever-shifting and evolving linguistic reality, at the francophonie level. These French speakers make up 78% of the total French-speaking population, i.e. 235 million people.

■ Developments and trends

Francophonie’s centre of gravity keeps moving southwards, thereby continuing a trend measured since 2010: out of the additional 22.7 million French speakers on the planet, 68% live in Sub-Saharan Africa and 22% in North Africa, while Europe and the Americas share the additional 10% remaining (respectively 3% and 7%). In the most recent period, the daily French-speaking population increased by 11% (slightly at the same pace than that measured between 2010 and 2014), but it increased by 17% on the African continent (i.e. by 2 more points than between 2010 and 2014). Such African dynamism originated in both the demographic vitality and the progress made in school enrolment on the continent. Its positive impact on the expansion of the French language shall continue in the coming years (subject to all the points that have been extensively developed in Part 1).

This overall expansion of the French-speaking³ population varies between countries. Yet, the most interesting point is the highly stable percentage of the population which can be referred to as being francophone, which still remains below 50% in most countries.

³ Baptiste BECK, Richard MARCOUX, Laurent RICHARD et Alexandre WOLFF. Estimation des populations francophones dans le monde en 2018. Sources et démarches méthodologiques. Québec, Observatoire démographique et statistique de l’espace francophone, Université Laval, Note de recherche de l’ODSEF, 2018. 160 p. www.odsef.fss.ulaval.ca/sites/odsef.fss.ulaval.ca/files/odsef-lfdm-2018.pdf



THE GEOGRAPHIC SCOPE OF THE DAILY PRACTICE OF FRENCH

COUNTRY OR REGION	% OF FRENCH SPEAKER (OUT OF TOTAL POPULATION)	COUNTRY OR REGION	% OF FRENCH SPEAKER (OUT OF TOTAL POPULATION)
“Born into French”:		Maghreb, “Living in French too”:	
▪ Canada-Quebec	93%	▪ Algeria	33%
▪ Federation Wallonia-Brussels	98%	▪ Mauritania	13%
▪ France	97%	▪ Morocco	35%
▪ Monaco	97%	▪ Tunisia	52%
▪ Swiss Romandie	81% (2005)	Shares the status of official language with one or several other languages, “Living in French too”:	
Other “Born into French” (significant%):		▪ Belgium	75%
▪ Andorra	70%	▪ Burundi	8%
▪ Lebanon	38%	▪ Cameroon	41%
▪ Mauritius	73%	▪ Canada	29%
Only official language “Living in French too”:		▪ Canada-New-Brunswick	42%
▪ Benin	33%	▪ Canada-Ontario	11%
▪ Burkina Faso	24%	▪ Central African Republic	28%
▪ Congo	59%	▪ Chad	13%
▪ Côte d’Ivoire	33%	▪ Comoros	26%
▪ Democratic Republic of Congo	51%	▪ Djibouti	50%
▪ Gabon	66%	▪ Equatorial Guinea	29%
▪ Guinea	25%	▪ Haiti	42%
▪ Mali	17%	▪ Luxemburg	92%
▪ Niger	13%	▪ Madagascar	20%
▪ Overseas France	84%	▪ Rwanda	6%
▪ Senegal	26%	▪ Seychelles	53%
▪ Togo	40%	▪ Switzerland	67%
		▪ Vanuatu	31%

PART 2

LEARNING AND TEACHING FRENCH

OVERVIEW

■ **State of play**

One of the reasons why the French language can be characterised as a global language pertains to the fact that it is not only taught everywhere in the world, but it is also a language for instruction, at various levels, in 36 countries and territories.

In addition to the educational systems, anyone who would like to learn French anywhere in the world will be able to find either a language centre, or an *Institut français*, or even an *Alliance française* or an association with various formats to respond to such a wish or need. Additionally, there are also a number of digital resources, the wealth and diversity of which keep extending.

By aggregating all data per country, at all educational levels, the population of learners of “French as a Foreign Language” (FFL) is worth at least 51 million people, and it is no less than 81 million people for those who are pursuing a full or partial instruction IN French. This aggregation takes into account the number of people enrolled in the

Alliances and *Instituts français* abroad, who represent slightly less than 2% of FFL learners, and in the French schools abroad, who only account for 0.5% of the French learners at global level.

■ **French as a Foreign Language (FFL)**

As was the case in 2014, the significance of **North Africa** and the **Middle-East** is due to the unique status of French in this region, where it is neither an official language nor the main language for instruction, yet a language practiced in the daily life of a significant part of the population. Mastering French is key in the academia and the professional career and/or it is a language used to teach specific subjects, as early as in primary school, in secondary school for sciences, and in some fields of the higher education system.

Sub-Saharan Africa and the Indian Ocean, where French is often a language for instruction, form the second part of the world as per the number of FFL learners. This is so because of the existence of educational systems that are officially or *de facto* “bilingual”, such as in Cameroon (English-French), Madagascar (Malagasy-French) or Mauritius

(Creole-French), where the early learning of French is encouraged; but also because of the popularity of French in countries such as Nigeria, Ghana, Liberia, Rwanda where English is the medium for instruction, or even Angola, Guinea-Bissau, Mozambique, São-Tomé-and-Príncipe alongside Portuguese, or Spanish in Equatorial Guinea.

Europe remains a major continent for learning French. Overall, French is the 2nd most learnt language in lower secondary school, and traditionally occupies the first rank in English-speaking countries and in those where it is an official language alongside others, such as Belgium, Luxemburg or Switzerland. Furthermore, depending on the countries, French is often the 3rd foreign language, sometimes the 4th, on a continent where multilingualism is proactively promoted.

America and the Caribbean demonstrate a widespread presence of FFL, traditionally very well established within the *Alliances françaises* and *Instituts français*. However, it is unusual to observe high numbers of learners in the educational systems, except in Canada of course, and in the United States. Indeed, in both cases, there is a genuine interest in promoting bilingual instruction and acquiring professional language skills, that are increasingly recognised as a criterion for employability.

Lastly, the **Asia-Pacific** area maintains room for learning French, especially thanks to a few Member Countries of La Francophonie, such as Cambodia, Laos or Vietnam, but also thanks to significantly high numbers of learners (in absolute figures; but this number remains modest compared with the number of school-going children) in countries with large populations such as China, India or Japan.

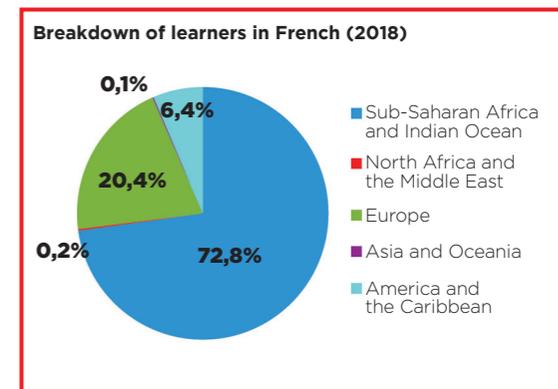
■ **French, a language for instruction**

Out of the 81 million people pursuing their education in French, three-quarters are enrolled in (public and private) national schools located in Sub-Saharan Africa and Indian Ocean countries. Indeed, at various levels, French is the main or single language for instruction in the educational systems of Benin, Burkina Faso, the Central African Republic, Comoros, Congo, the Democratic Republic of Congo, Côte d’Ivoire, Gabon, Guinea, Mali, Niger, Senegal, and Togo.

With over 15 million pupils and students, the weight of France largely explains the position of Europe, which ranks second worldwide.

Similarly, in America and the Caribbean, Quebec (and the rest of Canada) on the one hand, and Haiti, on the other hand, increase the relative importance of this region in comparison with the overall number of French learners, even though the figures for Haiti have not been updated for a few years.

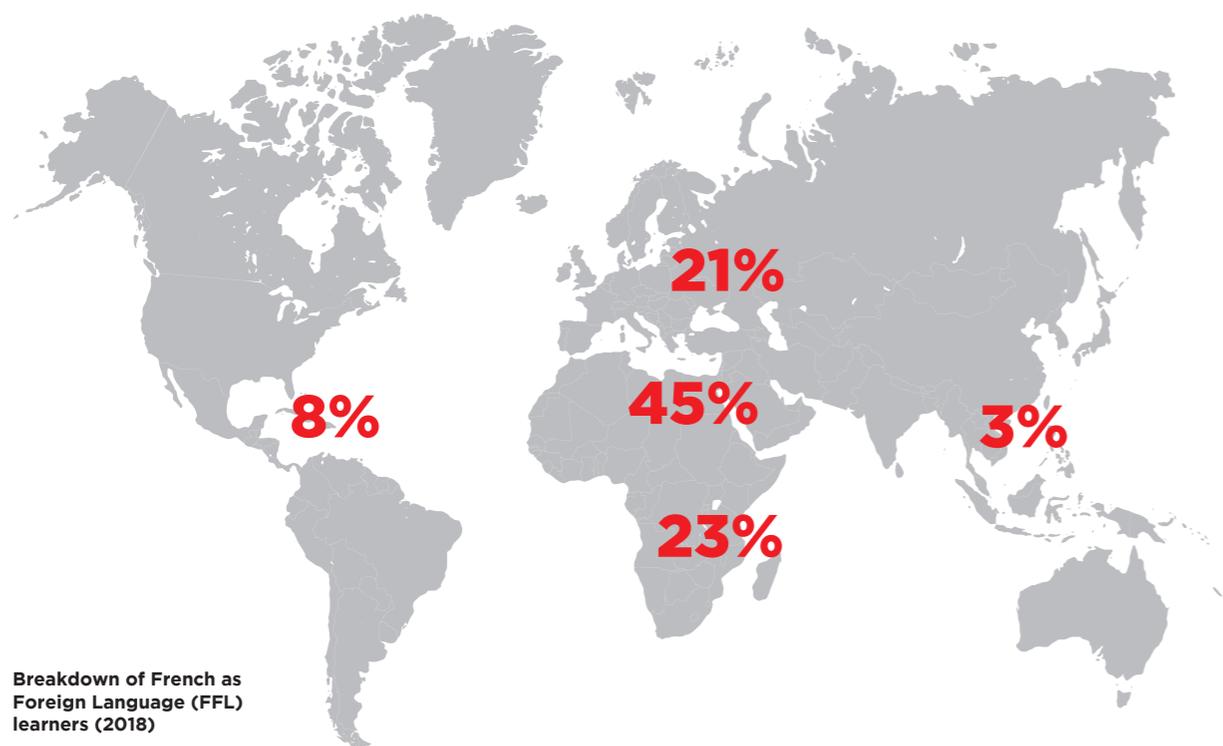
Also, within the population registered under this category, few are those who benefit from an exclusively French instruction (Creole usually maintains its position beyond the official levels; and French usage suffers from the insufficient linguistic level of many teachers who are supposed to use French for instruction).



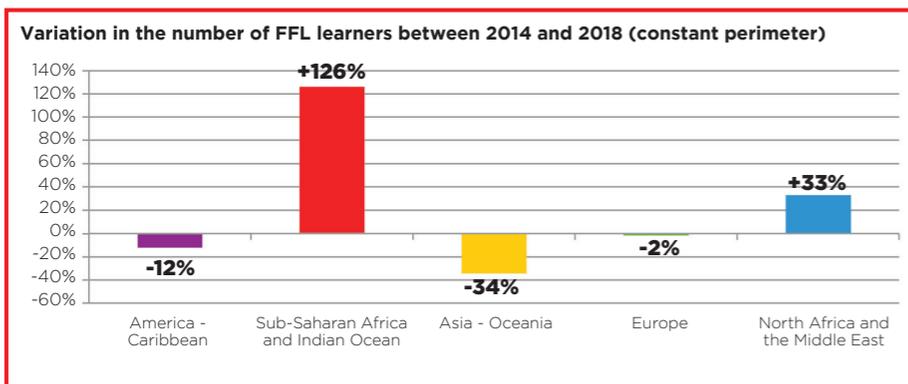
■ **Progresses**

Based on the rising total population (+8% learners between 2014 and 2018), the progresses observed in the number of learners by region confirm the dynamism of two geographic areas: Sub-Saharan Africa - Indian Ocean and North Africa - Middle-East. However, the share of Asia and the America- Caribbean region is decreasing, with a greater or lesser decline depending on the territories.

In **Europe**, considering the very slight decrease, of little significance, by 2% in four years, the situation is deemed stable, even though the French language is losing learners mostly in secondary school, with an ongoing decrease, especially in upper secondary education. However, the French language maintains its position at the continental



Breakdown of French as Foreign Language (FFL) learners (2018)



level, and this is due to an increasing audience in primary education and, in some cases, in lower secondary education.

NETWORKS AND DISSEMINATION TOOLS

The francophone stakeholders that promote the French language and francophone cultures organise themselves and federate into networks revolving around: the institutional Francophonie and its operators (AUF, Université Senghor, AIMF, TV5MONDE); the French cultural network abroad (Services of Cooperation and Cultural Action in the Embassies of France, *Alliances françaises* – AF – and *Instituts français* – IF); the structures involved in the educational and linguistic cooperation in French (APEFE-WBI⁴, Swiss Cooperation, etc.); and the national stakeholders.

Instruction in French is provided by both the AEFÉ (*Agence pour l'enseignement du français à l'étranger*) Educational network of French schools or France-certified schools abroad, and MIF (*Mission laïque française*) partner schools. Both types of schools are intended for: the children of the expatriates who settled abroad, the local students, and students of other nationalities who wish to pursue their education in French and might be preparing for academic mobility.

However, teaching FFL and providing instruction in French are missions that primarily rely on the national education systems through their pedagogic teams and

teachers. Some of them are affiliated to national associations of teachers of French (attached to regional commissions, themselves being federated into the FIPF – International Federation of Teachers of French). The regional offices of La Francophonie and the AUF, and the liaison offices in the countries (institutes, regional centres, francophone digital campus, CLAC⁵...) also coordinate the implementation of programmes and activities that unfold in the field, and articulate their interventions, especially alongside the IFEF (La Francophonie's Institute for Education and Training) and their partners.

It is in the field and through this institutional network that tools and mechanisms are being operated, with the support of multiple francophone expertise stakeholders. These experts cater for the training needs expressed by teachers, students and practitioners. They use, in particular, new technologies and social media, for they are easy to access and exchange.

A cultural offer, including trainings in French and certifications, is also deployed through the wide network of IF and AF worldwide. This cultural offer also includes the sharing of movies in French (IFcinéma) and digital tools (Frantastique, LingoZING, SpeakShake). It promotes networking among teachers from all over the world through a dedicated social media (IFprofs) and encourages access to cultural education through digital means (Alliance 3.0). It also provides hybrid trainings or 100% online trainings.

Also available to teachers in classroom, the IFOS Platform, the CLOM “Teaching FFL today”, and the trainings offered by the CAVILAM, BELC, CIEP, etc. are meant to facilitate the integration of ICTE in learning, developing trainings on specific objectives, bilingual instruction, etc.

Finally, a plethora of tools and resources are currently being developed by La Francophonie and some media: the FAD-FLE distance continuous training facility, developed

“French is a skill in demand in the academic and the professional world.”

by CREFAP (OIF); AUF's shared resources; the educational resources and programmes in French broadcasted by Arte (Educ'Arte), TV5MONDE (enseigner.tv5monde.com, apprendre.tv5monde.com, parlonsfrançais.tv5monde.com, “7 jours sur la planète” app), RFI (RFI SAVOIRS, Le talisman brisé, Parlezvous Paris?), and RTBF, or on the social media.

One of the main assets of the FIPF is also the use of digital tools that allow all the network members to communicate, share their activities and get trained (collaborative platform www.fipf.org); FIPF also publishes books intended for either a vast audience (“Le français dans le monde” and its supplement “Francophonie du Sud”) or a more specialised audience (“Dialogues et Cultures”, “Recherches et Applications”). Lastly, FIPF organises regional and international conferences that bring together hundreds of delegates (upcoming World Congress of July 2020 to be held in Nabeul, Tunisia).

REGIONAL AND COUNTRY PRESENTATIONS

■ North Africa and the Middle-East

In the Maghreb countries, although not an official language, French remains present in primary and secondary education (alongside Arabic, Dialectal Arabic or the so-called “spoken” national languages). The French language expands in private and higher education, in order to support the academic and professional international – especially business-related – mobility projects. Present in schools, in the administration, in the workplace, in the media, in the publishing and press sector, French operates as a foreign language. However, some countries have taken favourable provisions with regards to the French language. This is so in Tunisia, Morocco, Algeria, Mauritania, and Lebanon. This is also the case in Egypt, where French is a language for

instruction, alongside one or several languages, often as early as in primary school, and then as a language for instruction in the multiple higher education branches.

The 33% increase in the number of FFL learners confirms that the French language is still very important in the region's educational systems (accounting for 45% of the global figure), especially as part of the bilingual instruction schemes that are developing in Egypt, for instance, or Lebanon (which aims for a trilingual higher education system).

The network of 56 IF in the region brings together no less than 50% of the global figure; similarly, the AEFÉ network of French schools channels 39% of the total number of children pursuing their education in the French system worldwide (mainly in Morocco and Lebanon).

Therefore, mastering French is a skill in demand in the academic and professional world in a number of countries in the region, despite the challenges faced by the students (insufficient language skills at the time of entering higher education) and the educational teams (tools and methodology to be adapted to the reality of learning FFL). In this respect, the academic Francophonie strives to support instruction in French, through consolidating French studies departments and language centres, professionalising the curricula, building the capacities of the faculty, etc.

The interest of the public for academic and professional – including business – mobility programmes is reflected by the number of candidates to French certifications, as well as the sharp increase of the number of candidates to the DELF-DALF official diplomas, especially their “youth” versions (+48%). Mobility programmes for students – mainly originally from Morocco, Algeria and Tunisia – to France are constantly growing, and they account for the biggest numbers of the African continent.

⁴ Wallonia-Brussels Federation's Association for the Promotion of Education and Training Abroad

⁵ OIF's Reading and Cultural Activities' Centre

Furthermore, these countries increasingly host sub-continental student mobility programmes, as well as migrant populations. Lastly, the shift of populations coming from conflict-affected areas (Iraq, Syria, Libya) prefigures new demographic, linguistic and educational realities, with regards to integrating refugee populations, including Syrian children, in the educational system of host countries such as Lebanon.

■ Sub-Saharan Africa and Indian Ocean

In these countries, the positive developments in favour of French rely on the capacity of the educational systems to overcome several challenges. They need to develop tools, bi/multilingual instruction schemes adapted to French and the national languages (in multilingual environments); provide instruction to already massive and ever-growing numbers of children; and especially form a substantial and sufficiently trained faculty to face these many challenges. Indeed, French is the single language for instruction in 13 countries, and alongside one or several languages in 5 more countries. The number of children attending school in French in the region accounts for 73% of the total figure worldwide, 70% of which being in primary school. Countries such as the Democratic Republic of Congo (19 million pupils and students schooled in French) or Cameroon (5 million) and Madagascar (5 million) represent a considerable weight, even though they do not record the highest school enrolment rates. The French language is also being taught to many learners as part of bilingual mechanisms (Cameroon, Madagascar, Mauritius), and as a foreign language in English-speaking countries (Ghana, The Gambia, Nigeria, etc.) or Latin-language speaking countries, who are active supporters of the francophonie.

In non-francophone countries, FFL learners represent 23% of the total number of learners worldwide, occupying the 2nd position after North Africa and the Middle-East; the most significant increase worldwide (+126%) was also observed in these countries, with a good progression in Mozambique, São-Tomé-and-Príncipe, Namibia, and a moderate increase in South Africa and Angola. FFL teaching seems to be looking at the professional practice of French, especially in higher education, with a view to the intensification of professional and trade activities currently ongoing with the French-speaking border countries.

“French is the second foreign language learnt in Latin-American countries, after English.”

There is a slight progression in the number of learners of the French language within the IF and AF network, with a total figure of 78,000 learners (of which 30,000 in non-francophone countries). The most important cohorts were mainly found in Madagascar, with 30,600 learners, or countries such as Nigeria, Ghana, Kenya and South Africa. It is also worth noting that the rules and procedures for professional mobility to Quebec have recently been amended. The new rules emphasise French language skills (through the ad hoc TEF and TCF official certifications), since a significant share of the candidates at global level were originally from French-speaking countries, such as Cameroon and Côte d’Ivoire.

■ America and the Caribbean

Learning the French language traditionally occupies a special place, for two reasons. Firstly, because of its attractiveness at the cultural, scientific, and economic levels. Secondly, because it is an asset for student mobility and professional integration to the neighbouring francophone area.

The second foreign language learnt in Latin-American countries after English, French is also strongly valued in a number of countries such as Costa Rica, where it is mandatory at school, or Saint-Lucia (in 85% of the primary schools).

A French language promotion and reintroduction plan is also currently being implemented in the educational systems of Central America’s countries (Honduras, Guatemala, Nicaragua, Panama, Salvador).

However, the number of learners of French is usually limited in the educational systems, except in Canada (immersion class outside Quebec) and the United States. There is a genuine interest arising in these two countries with regards to bilingual instruction and developing professional language skills.

For its part, the teaching of FFL by the AF network (and some IF) is well established in the region (since 1884), embedded into one of the largest (with 316 AF spread in 31 countries) and widest (United States, Argentina, Brazil, Mexico) regional networks in the world, with close to 196,000 learners accounting for 42% of the learners worldwide.

The AEFÉ French educational network is equally well rooted in the region, with 90 schools (out of which 26 are members of the *Mission laïque française*). The 2nd worldwide, this network accounts for 16% of the world’s total headcount (56,000 students), out of which nearly 70% are not French nationals. This is a sign of quality of the French curricula.

Finally, the number of candidates to French official certifications in countries such as Mexico, Colombia, Haiti, Brazil, Argentina or Cuba shows how relevant French is in academic and professional mobility programmes. This is the 2nd region worldwide in terms of number of candidates to the “youth” versions of the DELF (after Europe). A significant share of the candidates also apply to the certifications for migrating to Quebec or Canada (also as part of domestic mobility programmes to Quebec, following the shift of student/resident status to Canadian citizenship). Moreover, French certifications seem to be increasingly well-established in some countries (Cuba, Haiti, Peru), especially in the tourism industry, US universities for Business French, or Mexican technology universities, in order to meet the needs of the labour market.

Despite the undeniable relevance and potential of French, the decrease of FFL learners by 12% shows the little interest of the educational systems in promoting multilingualism and integrating French – and making it mandatory – and other languages alongside English, at least for the time being.

■ Asia - Oceania

Instruction in French is primarily provided for by the AEFÉ educational network present in the region. This network accounts for about 6% of the headcount worldwide, with over 21,000 pupils and students attending school in French in 48 schools. The region also includes the territorial authority of New-Caledonia, attached to France, and the Vanuatu, where English and

“The Asia-Oceania region is the first area of origin of international students worldwide.”

French are both granted a special status (languages for instruction from pre-school to secondary school as part of English- or Frenchspeaking educational systems). Australia and Laos also provide bilingual instruction schemes.

Asia-Oceania is the least dynamic region in the world when it comes to learning FFL (3% of the total figure worldwide, decreasing by 34% and more so in primary and secondary school, despite a strong potential in higher education). The overall number of candidates to the DELF-DALF certifications also dropped by 9% between 2014 and 2016 (except for China and South Korea where it is progressing).

FFL learning maintains its position thanks to the member countries of La Francophonie (Cambodia, Laos and Vietnam); the substantial numbers of learners in countries with large populations such as China, India or Japan; and the potential observed in South Korea, an observer member of La Francophonie since 2016.

The number of FFL learners in the AF and IF network also decreased by 3% (with 131,800 learners in 2017). However, it still involves particularly significant numbers of learners in India (the 2nd country worldwide for the AF, with 28,500 learners), China (20,800 learners) and Australia (11,000). Some countries, such as Bangladesh and Kazakhstan, also observed a sharp increase of their headcounts between 2012 and 2017.

According to Campus France, the Asia-Oceania region is the first area or origin of international students worldwide, with 1.9 million students involved in mobility programmes (out of which 0.8 million Chinese students), i.e. 42% of the students involved in mobility programmes in the world.

“In Europe’s English-speaking countries, [...] French is the first foreign language learnt in school, and the second one in German-speaking territories.”

It is also worth noting the significance of sub-regional mobility to Australia, Japan, Malaysia, South Korea and New-Zealand, the main host countries for students coming from Asia-Oceania. In this region, English has become the main language of communication, a fact that has already been taken into account by the strategy of attractiveness of francophone universities.

■ Europe

French is the first language of 12% of the EU citizens (compared with 16% for German, and 13% for English – before Brexit – and Italian). Overall, it remains the 2nd most learnt foreign language in lower secondary school in the EU member countries (with 26.1% of all pupils learning it, compared with 96.2% learning English, 16.8% learning German, and 12.6% learning Spanish).

Outside the educational system, the AF and IF network contributes to the spread of French on the continent. About a third of the facilities of this network are located in Europe, i.e. 200 so-called “teaching” AF, and 55 IF.

Lastly, learning the French language in Europe also relies on the “French Lycées”. When combining the AEFÉ-certified establishments and those of the *Mission laïque française*, the Lycées host nearly 75,000 children from pre-school to secondary school. This represents 19% of the total figure of children enrolled in such schools in the world, and it makes the region the 2nd in the world after North Africa and the Middle-East. There was a 10% increase compared with the school year 2013-2014.

In Western and Northern Europe: in English-speaking countries, and in the non-francophone parts of Belgium, Luxemburg and Switzerland, French is the 1st foreign language learnt. It is the 2nd one in German-speaking territories. Everywhere else, not only is English largely dominant as a language, but it is often followed by German and/or Russian (in the Baltic States), making French the 3rd or 4th language learnt.

In Central and Eastern Europe: French used to be very attractive to the previous generations who are now ageing, as is the case of the teachers responsible for transmitting the language.

Similarly, it proves difficult to modernise the learning methods and resources. However, French is increasingly regarded as a global language, beyond the European continent, and this contributes to revive its image. French is considered a prestigious language, but too elitist and less suitable to business than others. In parallel, Russian has also significantly dropped since the early 1990’s, even though it is still practiced in many countries.

In Southern Europe: In countries such as Andorra, Spain, Italy and Portugal, the languages spoken are from the same family as French. Beyond the geographic proximity, this situation favours the French language. Furthermore, these countries enjoy exceptionally high rates of francophonie (between 12% and up to 25% of the population, and as high as 70% in Andorra). This is mainly because of the number of people who have learnt French at school, even though the (older) migration shifts and (still active) tourist flows have also encouraged exchanges between the countries. These movements are still ongoing today and their effects are still being felt.

PART 3

THE ECO- NOMICS OF THE FRENCH LANGUAGE

THE ECONOMIC FRANCOPHONIE

From an economic point of view, language is all at the same time and alternately: a source material (thinking, speaking, writing); a production factor or intermediate product (information, data, history or scenario); an end product (speech, story, poem, motto, lyrics, etc.); and a regulatory and normative framework. Moreover, language could be regarded as “an externality” to the extent where mastering it (or not) and sharing it (or not) create the more or less favourable conditions to wealth creation. This is particularly so in international economic relations, since sharing a common language allows to boost exchanges (trade in goods and services). This is also the case in some sectors such as creative economy and tourism.

Obviously, the economic francophonie is also made of the economic weight of the thirty countries in which French is either an official language or spread enough in the population so as to be present in a significant part of the economy. Such space shall be referred to as the Francophone Area (FA).

■ **The weight of the Francophone Area (FA)**

With 540 million inhabitants, the FA brought together 7.3% of the world’s population in 2016, compared with 6.4% in 2000. In the last fifteen years, the population of the FA countries grew faster than that in the rest of the world, with an average growth of 2% per year. The geographic distribution of the population of the FA countries stresses the demographic weight of Sub-Saharan Africa. This region concentrates 58% of the Area’s total population, and 73% of the population under 15 years of age.

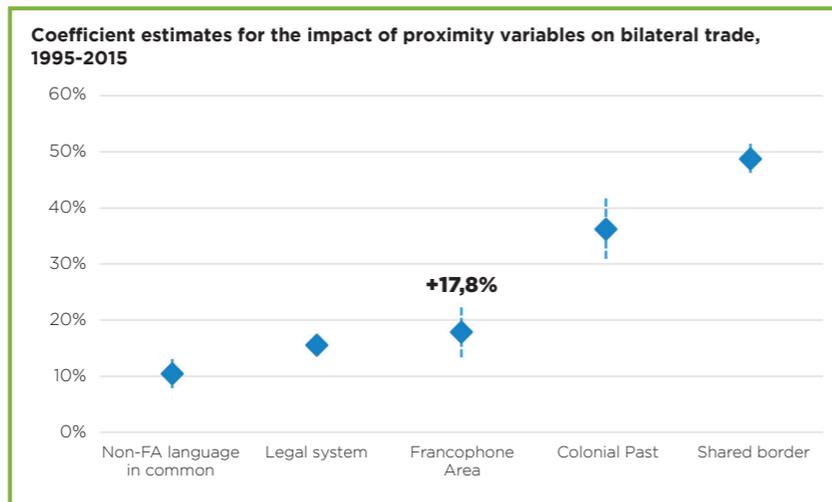
In terms of Gross Domestic Product (GDP), the importance of the FA in the world is slightly higher than the FA’s demographic weight estimate. Thus, the FA countries have generated 8.7% of global wealth in 2016. The analysis of wealth distribution within the Francophone Area revealed that 90% of the area’s

“In the last fifteen years, the population of the Francophone Area’s countries grew faster than that of the rest of the world.”

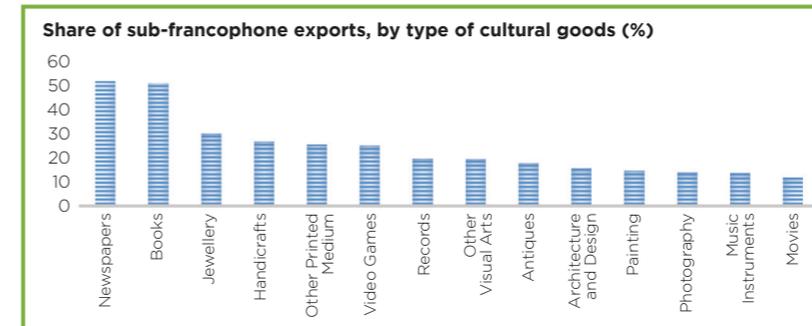
GDP had been generated by the Northern countries, followed at a distance by the countries of the Maghreb (6%) and Sub-Saharan Africa (4%).

■ **The advantages of belonging to the FA**

In 2015, the FA’s exports of goods accounted for 10.9% of the world’s exports; and its imports of goods represented 12.2% of the world’s imports. Both figures recorded decreases since 1995. On average between 1995 and 2015, the exchanges of goods between two FA countries exceeded by about 17.8% the exchanges made between two non-FA countries with similar features.



“Sharing the French language is a particularly important determinant in exchanging cultural goods based on a written medium.”



In 2015, the average trade openness rate of the member countries of the FA increased by 3.5% (simple average) – all things being equal. The highest additional trade openness generated by the FA was observed in the Sub-Saharan African countries. This is due to the intensity of sub-francophone trade between these countries. In 2015, an additional 4% GDP per capita on average was observed in the countries of the FA, due to the higher trade exchanges within the area.

■ **The Francophones and creative industries**

In 2015, on average, 34% of the exports of cultural goods of the FA were exported to other FA countries (compared with 13% for other types of goods). Similarly, 24% of the total imports of cultural goods were imported from other FA countries (compared with 12% for other types of goods). Both figures increased by 10 and 8 points respectively compared with 2008. The FA is a vital cultural market for the so-called “language-intensive” products. Thus, nearly half of the exports of newspapers and books in the FA countries were exported to the other countries of the Area between 2008 and 2015.

Sharing the French language is a particularly important determinant in exchanging cultural goods based on a written medium. Thus, newspapers and books bilateral exchanges have increased eight-fold on average. Other printed goods, such as albums and map publications, are also subject to more intense exchanges between two countries having French as a language in common, with an average doubling of such exchanges.

On average, the FA countries have increased their overall bilateral trade in cultural goods by 153%, all things being equal.

FRENCH FOR EMPLOYMENT

Is French part of the required skills in job offers? In which sectors or profiles is it considered an asset? Is it taken into account by companies when recruiting collaborators? For which type of positions? To answer these questions, a series of surveys were conducted about the employability of people who master French in a handful of countries, especially those where it is a foreign language: Armenia, Bulgaria, Cambodia, Kenya, Lebanon, Madagascar, Nigeria, Romania and Vietnam.

“French is undeniably an asset in looking for a job.”

With the exception of Nigeria⁶, the percentage of job offers requiring the mastering of a foreign language is relatively high: between 34% (Romania) and 80% (Armenia).

Outside English-speaking countries, English is the most frequently mentioned language in job announcements⁷. Nonetheless, French remains present and particularly valued in the following sectors: trade relations and sales, international (governmental and non-governmental) organisations, hospitality industry and tourism.

Inevitably, mastering French is indispensable when working as a translator and on outsourced teleservices platforms dealing with francophone countries. What is more astonishing is that the review of job offers requiring French shows that it is associated with the profiles of positions in information technologies.

Regarding the “companies’ language policies”, it is striking that a significant share of recruitments, including that of nationals (who account for a vast majority of recruitments in all countries), is subject to speaking a foreign language.

The language requirements of companies for recruitment consistently match the trends observed in the review of job offers: the predominance of English and a solid 2nd position for French, well behind, except in Madagascar where it comes first, and Armenia, where Russian comes in between English and French.

In short, the ability to speak and write French (in general, a B2 level is required, i.e. advanced or independent language skills) is undoubtedly an additional asset in seeking an employment when language skills are required.

⁶ A country in which a great number of offers were reviewed (1,000).

⁷ To be noted: in 2 countries (Lebanon, Madagascar), it was not possible to review job offers.

PART 4

FRENCH ON THE AIR- WAVES AND ON THE WEB

THE PRESENCE OF FRENCH ON THE INTERNET

Two studies⁸ were conducted in parallel with different methodological processing of a common sample of digital sources. The sources consisted in a collection of applications and Internet spaces. Based on the indicators, one of the studies aimed at providing series of comparative rankings between French and other languages. The other study aimed at producing quantified indicators of the presence of 140 languages – with more than 5 million speakers – on the Internet. The latter was based on a statistical processing of data.

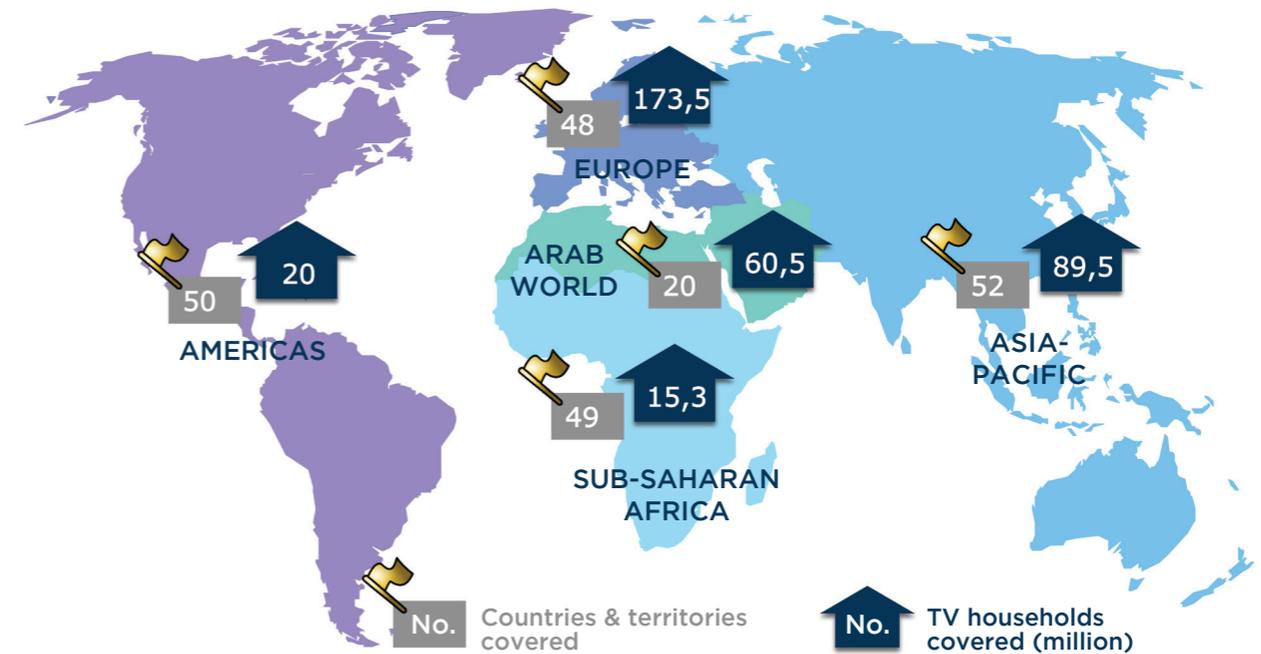
Based on the same sources, each study produced results that converged in indicating a solid ranking of French as the 4th language on the Internet, behind English, Chinese and Spanish respectively.

The main categories (“Internet users”, “contents”, “uses”, etc.) and micro-indicators resulted in different ways of measuring the share of languages on the Internet and provided a more detailed overview.

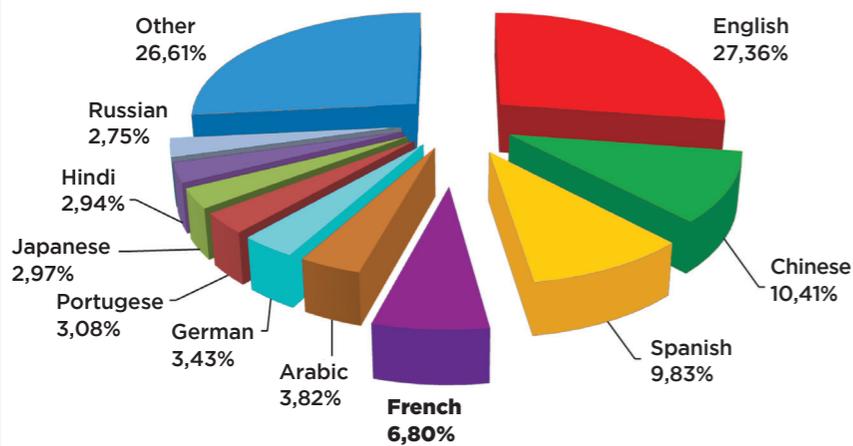
The following table shows the rank of French based on different indicators.

L1+L2 CRITERIA	GLOBAL RANKING	GLOBAL SHARE
Internet Users	4	5,6%
Traffic	3	7,8%
Uses	4	7,4%
Contents	2	9,3%
Index	4	7,3%
Interfaces	4	7,4%
Percentage of speakers connected (to the Internet)	11	8,1%

THE TV CHANNEL TV5MONDE IS BROADCASTED IN 360 MILLION HOUSEHOLDS AND OVER 200 COUNTRIES



Main languages, all applications altogether (first and second languages combined)



THE INTERNATIONAL FRENCH-SPEAKING MEDIA

Despite the many public operators, the broadcasting sector is strongly competitive. Such competition grew more intense with the development of digital technology and the variety of consumption modes (linear, on demand, online, catching up...). In this respect, the number of French-speaking stakeholders or distributors of French-speaking contents – even when they belong to non-Francophones – provides a full picture of the outreach of the

French language. The growing population of French speakers, as previously mentioned, has strengthened the interest and appetite of the forces at work, especially with regards to the African continent.

The reference francophone TV channel TV5MONDE and the MFP Association (Les médias francophones publics) have a mission and core ambition: broadcasting a wide range of francophone contents originating from (or directly produced by) La Francophonie countries. Outside of these references, many regional/international-focused TV channels also broadcast news, shows, films documentaries... directly in French or subtitled. TV5MONDE certainly is the leading global TV channel in French. It brings together close to 60 million viewers a week on average (weekly cumulative audience).

Received by over 360 million households, TV5MONDE covers over 200 countries and territories. The channel broadcasts programmes in French with subtitles in 14 languages (English, German, Spanish, Portuguese, Dutch, Romanian, Russian, Arabic, Japanese, Korean, Vietnamese, Traditional Mandarin, Simplified Mandarin and French).

Nonetheless, this part of the publication acknowledges the wealth of the offer by other operators, including on their websites. Providing an overview of their offer and the main broadcasting and audience figures, the report stresses the significance of the following media: RFI, France 24, Arte, Canal+ Afrique, Radio-Canada, Radio France, TV5 Québec-Canada, RTBF, RTS, Télé Québec, TFO, BBC, CGTN French (and News.cn), Deutsche Welle, Russia Today France, AFP and Agora Francophone.

⁸ <http://observatoire.francophonie.org/2018/Place-francais-sur-Internet-D-Pimienta.pdf>
<http://observatoire.francophonie.org/2018/Place-francais-sur-Internet-D-Prado-Annexe.pdf>
<http://observatoire.francophonie.org/2018/Place-francais-sur-Internet-D-Prado.pdf>



Report by La Francophonie ***The French Language worldwide 2018***

Lead: Youma Fall, Director, “French Language, Culture and Diversity”

Coordination: Alexandre Wolff, Head, French Language Observatory

Editing: Francine Quéméner and Alexandre Wolff

Collaboration: Lola Aubertin, Amel Hocine, Mériem Lahouiou, Mélanie Léger-St-Cyr.

Assistant: Dayana Duclos

Direct contributors: David Bel, Bernard Cerquiglini, Souleymane Bachir Diagne, Jean-Marie Klinkenberg, Jean-Martial Kouamé, Maria Masood, Daniel Pimienta, Daniel Prado, Rada Tirvassen

Translator into English: Patricia Martinache

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