

'Big four becomes big 14' in dominating international education

Anglophone destinations no longer rule the roost, but experts say composition and quality should matter more than volume

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The era of the “big four” international education destinations has passed, with at least a dozen rival nations jostling for primacy.

Stephanie Smith, Shanghai-based trade commissioner with Austrade, said Chinese students heading overseas before the coronavirus pandemic had chosen from the US, UK, Australia or Canada. That had changed since Covid. “The agents talk about the ‘big 14,’” Smith told the Australian International Education Conference. “It puts us in a lot more of a competitive environment.”

She said affordability issues were driving Chinese students to look at alternative destinations, as a global cost-of-living crisis coincided with a domestic economic slump. Options closer to home also offered linguistic familiarity, geographical proximity and – arguably – better employment and internship opportunities.

Hong Kong had become a “massive new market” for mainland Chinese students, particularly after the territory allowed universities to increase the non-local share of subsidised enrolments to 50 per cent (<https://www.timeshighereducation.com/news/hong-kong-lifts-cap-non-local-students-50-cent>).

Government investment in higher education was paying off in rankings success



Source: iStock

(<https://www.timeshighereducation.com/news/international-ranking-2025-hong-kong-extends-its-lead>). “You can really count Hong Kong as a new key competitor for Australia,” Smith told the conference.

Others included Korea, Vietnam, Malaysia, Singapore, New Zealand, the United Arab Emirates and Ireland, which was “doing a good job at destination marketing in China”. France and Germany were considered safe and welcoming with good employment opportunities and low tuition fees.

“It’s no longer just teach and they will come,” Smith told Australian educators. “We have to defend and grow our position through marketing, promotion and showcasing.”

Alternative destinations now collectively attract more prospective Chinese students than any of the big four members, according to the latest survey by IDP Education, with France under consideration by 30 per cent and Germany by 19 per cent.

“The competition really is hotting up,” said Melissa Banks, senior partner with The Lygon Group of consultants. She said the large South-east Asian nations of Indonesia, the Philippines and Vietnam were not only “setting themselves up” to host transnational education partnerships, such as foreign branch campuses, “but they are also attracting students in their own right”.

France aims to enrol 500,000 international students by 2027 as part of its “Bienvenue en France (<https://aca-secretariat.be/newsletter/france-builds-pillars-of-a-new-internationalisation-strategy/#:~:text=France>)” strategy. India reportedly has a goal of enrolling 500,000 foreign students by 2047 (<https://erudera.com/news/india-sets-goal-of-500000-international-students-by-2047/>), while Japan wants to host 400,000 by 2033 (<https://www.timeshighereducation.com/opinion/japanese-higher-education-needs-paradigm-shift>).

South Korea’s target of 300,000 international students by 2027 has reportedly (<https://monitor.icef.com/2025/10/south-korea-hits-its-300000-student-target-two-years-ahead-of-schedule/>) been reached two years ahead of schedule. Turkey wants 500,000 by 2028 (<https://studyinturkiye.com/turkiye-attract-500000-international-students-2028/>). Kazakhstan’s target of 100,000 foreign students by 2028 has reportedly (<https://www.universityworldnews.com/post.php?story=20251010110931546#:~:text=Kazakhstan%20has%20moved%20at%20breakneck,in%20just%20a%20few%20years>.) been increased by 50 per cent. Other countries reportedly (<https://erudera.com/news/these-countries-are-planning-to-accept-more-international-students-by-2026-beyond/>) setting international enrolment targets include Azerbaijan, Finland, Iran and Taiwan.

Jon Chew, chief insights officer at Navitas, said expressions like the “big four” belonged to the “market era”, when “winning” meant volume and growth.

“Do we have the composition, the distribution, the integrity and the quality that we want? If we do, maybe it doesn’t matter that we’re losing market share. It is going to be competitive, but I think it’s a very different outlook that we’re going into.”

Julian Hill, Australia’s assistant minister for international education, said geopolitics and demographic change had fuelled a shift towards “a more multipolar sector”. This was a welcome development, he said.

“This sector...allows young people at formative stages of their life to get to know other societies and get to know each other. I think it’s a very good thing that that occurs in a blended way across as much of the world as possible.”

Larissa Bezo, CEO of the Canadian Bureau for International Education, said the tally of “top receiving countries” numbered somewhere between 15 and 20. “We’ve moved well beyond the big four,” she told the conference. “I see that as a positive.”

Bezo highlighted the opportunities for “traditional receiving markets” like Canada to “work together” with emerging destinations. Canadian institutions, burnt by Ottawa’s international student caps (<https://www.timeshighereducation.com/news/canada-may-fall-short-caps-overseas-interest-nosedives>), were “very much leaning into partnerships and...new modes of transnational education”.

The same applies Down Under, according to Phil Honeywood, CEO of the International Education Association of Australia. “There’s already such strong partnerships offshore in Dubai, in Malaysia and so on. There’s an opportunity to really be part of that new study hub progression, rather than be competing with it.”

Fanta Aw, CEO of the Washington-based Association of International Educators, said many of the competing institutions in the Middle East and Asia had been established by locals educated in American colleges. “These are graduates of US institutions...going back and creating capacity at home. That’s part of what education is supposed to be about. I think this is healthy.”

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