Who Will Control the AI Infrastructure of Higher Education?

From useful tools to structural dependence, and how universities can still shape their future

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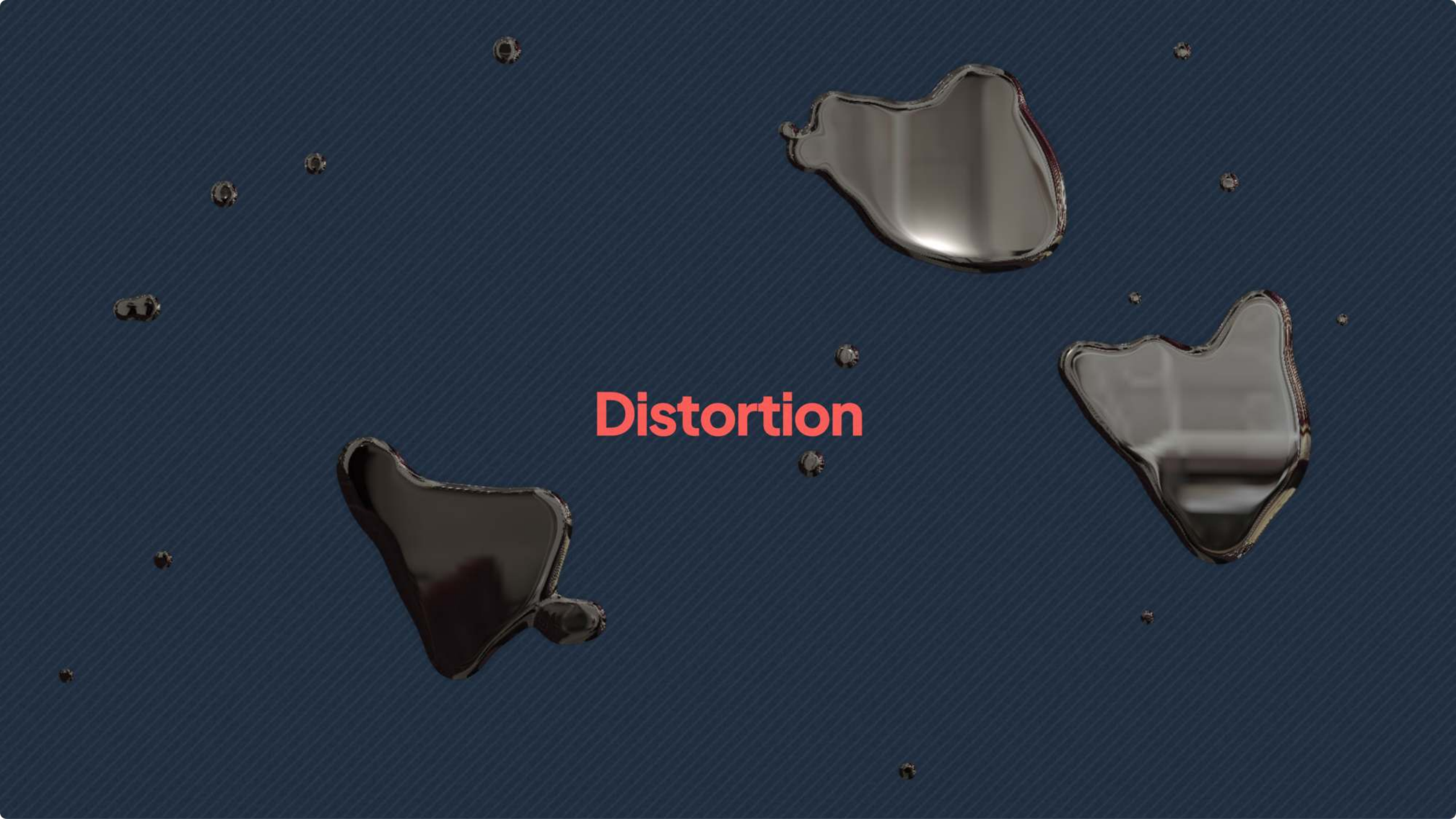
Dr Stuart Grey

Distributed Agents for Autonomous Spacecraft

Free Text Analysis with Student Voice AI

Transparency


Distortion


Extraction

The argument in higher education is no longer about whether AI tools are useful. It is about who decides what we can do with AI.

T D E

Section 1

From tool to infrastructure

AI is moving from visible tools to invisible systems

- Teaching and assessment
- Support and admin
- Research and governance

Student adoption is already mainstream

95%
of UK FT UG students use AI

94%
use gen-AI to help with assessed work

65%
say assessment has changed due to AI

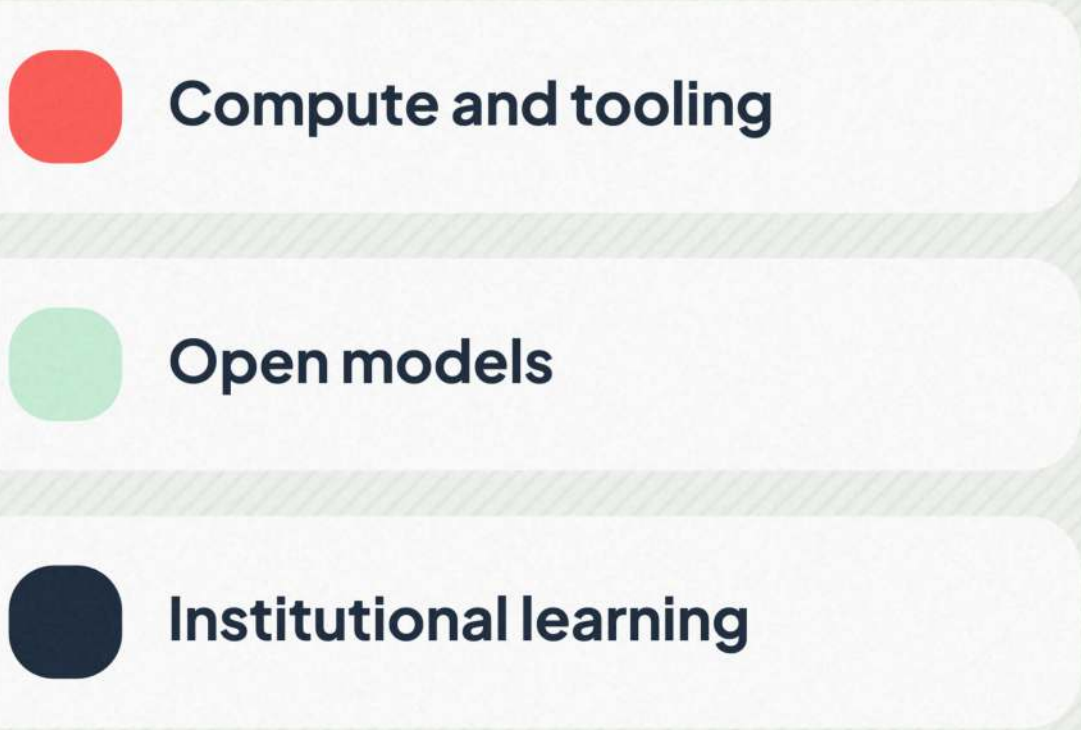
Universities need a viable system for AI governance, not just a policy

- Coordinated approach
- Build assurance
- Steer by mission

Section 2

The bubble

Tech companies are building capacity that universities may later inherit



The upstream build-out is vast, and highly concentrated

68%
top three providers' share of the public cloud market

$180bn
Alphabet's 2026 capital expenditure

~$1tn
announced multi-year AI infrastructure deals

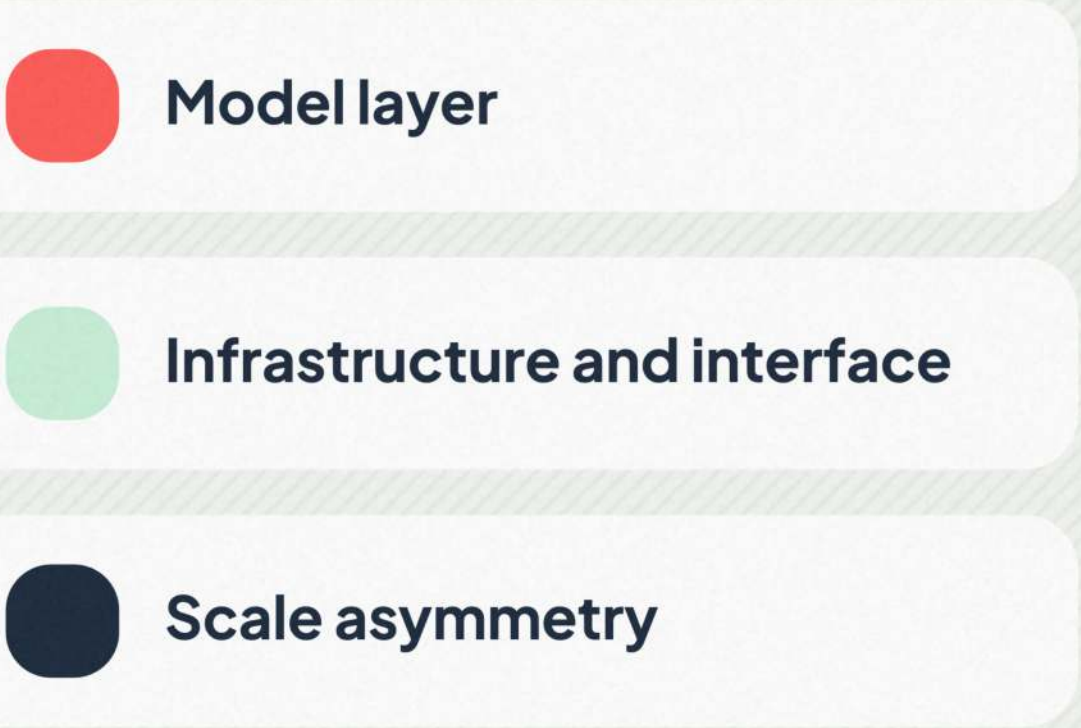
But infrastructure built in a frenzy can still produce dependency

- Lock-in during generosity
- Misplaced priorities
- Capture of norms

Section 3

Who sets the defaults?

A small number of firms increasingly control every layer



The real question is whose goals the technology serves

- Direction matters
- Competing incentives
- Academic and student interests

Procurement teams set the agenda

- Bundled convenience
- Default pathways
- Contractual gravity

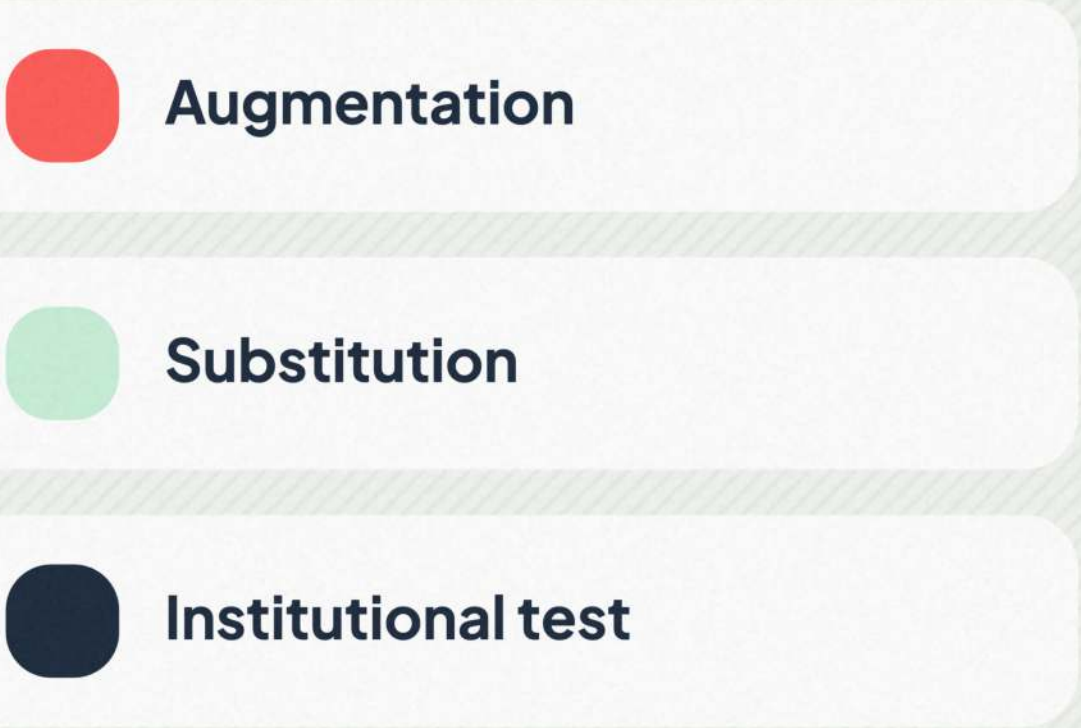
TAKEAWAY

If universities buy into a set of tools on vendor terms, the infrastructure is decided before it is debated.

Section 4

What dependence looks like

The crucial divide is between augmentation and substitution



The easiest uses to scale are often the least educationally valuable

- Substitution at scale
- Augmentation where it counts
- Institutional test

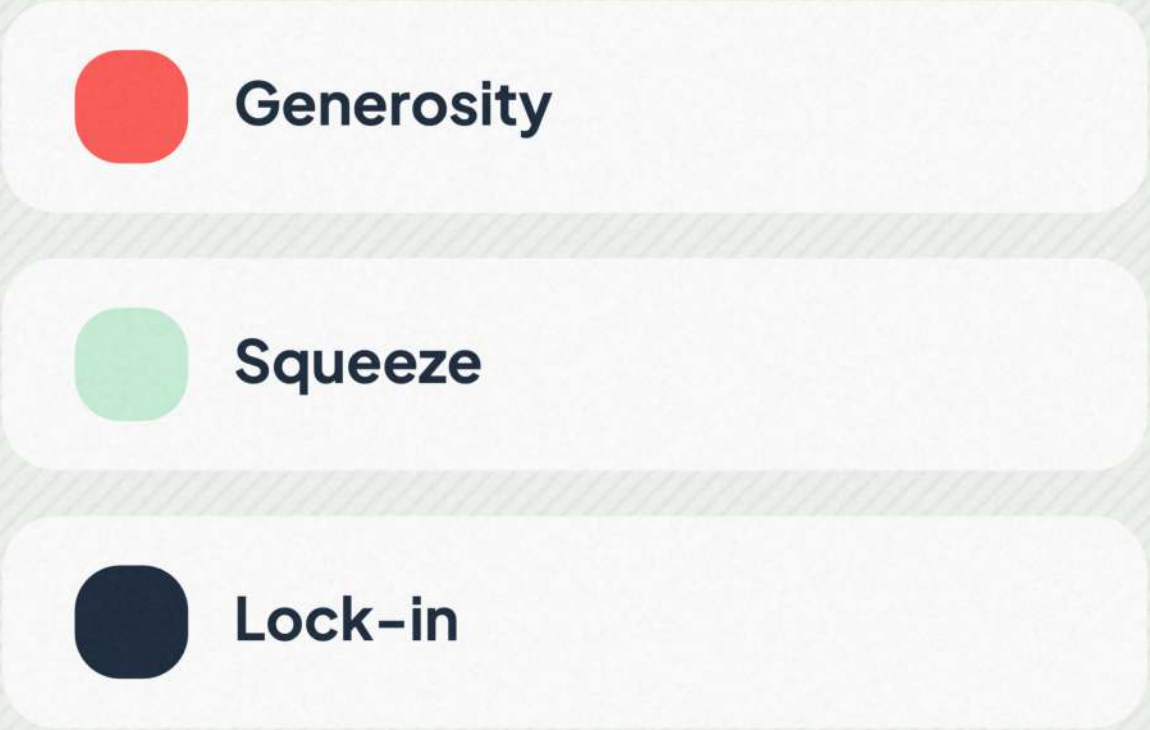
Pedagogy starts to bend around what the platform can measure

Priceless educational data will be captured unless it is governed

Section 5

The lifecycle of capture

Convenience becomes dependence in stages



Path dependence becomes governance

Prefer modular architecture and plural ecosystems

- Modular design
- Plural model exposure
- Right-sized models

Section 6

A different strategy

The strongest response is neither refusal nor surrender

- Buy some things
- Build or host selectively
- Refuse some things

Start from public-interest goals, not adoption goals

- Human contact
- Inclusion and accessibility
- Educational purpose

A DIFFERENT STRATEGY

Make evaluation a core institutional capability

Sector collaboration and public alternatives matter

- Shared procurement
- Shared evaluation
- National, regional or mission-based

Ownership means owning some of the stack

- Compute where it matters
- University-specific models
- Continual evaluation

A DIFFERENT STRATEGY

The alternative to passive dependence is not heroic self-sufficiency. It is practical stewardship.

Section 7

What the next decade looks like

If universities play this moment well

- Cheaper infrastructure, better terms
- Human-centred pedagogy
- Stronger public capacity

If universities drift into platform dependency

The next few years require three decisions from leaders

- What must we retain control over?
- What should we build or evaluate together?
- What rights should students have?

WHAT THE NEXT DECADE LOOKS LIKE

Universities are not only deciding whether to use AI. They are helping fix the defaults of higher education for years to come.

T D E

CLOSING QUESTION

We have all the pieces to build and control our own AI systems, so what are we going to build?

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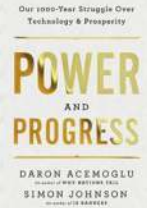

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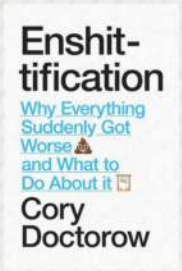

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