

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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15 April 2026

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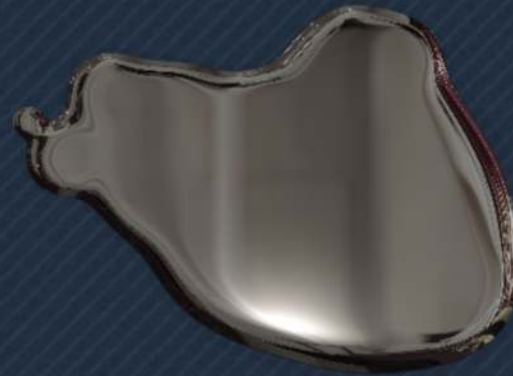
Distributed Agents for Autonomous Spacecraft

Free Text Analysis with Student Voice AI



Transparency

Distortion



An abstract graphic on a dark blue background with a fine, repeating geometric pattern. Three large, dark, glossy liquid splashes are arranged horizontally. The central splash is the largest and most complex, with several rounded protrusions. To its left is a smaller, more rounded splash, and to its right is another splash of similar size and shape. The word "Extraction" is written in a bold, red, sans-serif font, centered horizontally between the left and right splashes and overlapping the bottom edge of the central splash. Scattered throughout the background are numerous small, solid black circles of varying sizes, some appearing to be floating or falling.

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.**

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



Compute and tooling



Open models



Institutional learning

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



Model layer



Infrastructure and interface



Scale asymmetry

**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.



What dependence looks like

**The crucial divide is
between
augmentation and
substitution**



Augmentation



Substitution



Institutional test

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



Standardisation pressure



Surface metrics



Platform visibility

Priceless educational data will be captured unless it is governed



Behavioural exhaust



Upstream capture



Governed asset

Section 5

The lifecycle of capture

Convenience becomes dependence in stages



Generosity



Squeeze



Lock-in

Path dependence becomes governance



Standards harden



Investment compounds



Options narrow

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.**



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



Rent extraction



Thin provision



Opaque governance

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.



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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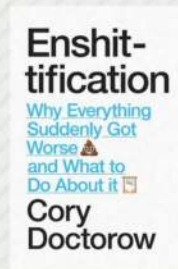


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LINKEDIN

FURTHER READING



Power and Progress
Daron Acemoglu
& Simon Johnson



Enshittification
Cory Doctorow



Supremacy
Parmy Olson



Empire of AI
Karen Hao



Pop!
Daniel Gross



Boom
Byrne Hobart &
Tobias Huber