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FROM VOLUME TO SOVEREIGNTY · ESSAYS I–VII

From Volume to *Sovereignty*

The end of an era in international higher education.

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NOTE ON THIS PUBLICATION

The seven essays collected here were originally published on LinkedIn between April and May 2026 under the series title *From Volume to Sovereignty*. They are presented in this document in the form in which they were first released.

The series traces a single underlying shift in international higher education — from a volume discipline organised around enrolment, revenue, and partnerships signed, to a discipline of risk and sovereignty organised around exposure, credibility, and alignment under constraint — across five regions: North America, Latin America, Sub-Saharan Africa, Asia, and the Gulf. The closing part turns from diagnosis to architecture.

References for Parts 1 and 2, which were not appended to the original posts, are included here for completeness. Each part closes with its selected sources.

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The *argument*, in seven parts.

I — From Volume to Sovereignty — p. 06
The end of an era in international higher education.

II — Unplannable — p. 10
Why North American universities are solving the wrong problem.

III — The Sovereign Host Question — p. 14
An analysis of Latin American student mobility.

IV — The Clause Nobody Negotiated — p. 20
Sub-Saharan Africa, brain drain, and the contracts behind it.

V — What the Host Wrote Back — p. 26
China, India, and the Gulf rewrite the terms of engagement.

VI — After the Asymmetry — p. 34
The simultaneous reordering of both ends of the relationship.

VII — The Architecture of Sovereign Internationalization — p. 40
From diagnosis to architecture.

– *About the Author & Societās Partnerships* — p. 46

PART ONE OF SEVEN

The most consequential shift in international higher education in thirty years is not about enrolment numbers. It is about what kind of discipline internationalization actually is.

From Volume to *Sovereignty*

The end of an era in international higher education.

In early March 2026, Studyportals reported that search traffic for Gulf study destinations had dropped 43 percent from its pre-conflict peak following a regional escalation in the Middle East. In the US, universities began retreating from recruitment markets where admitted students couldn't secure visa appointments in time to enrol. In Brussels, the European Commission moved toward launching a Centre of Expertise on Research Security under the principle that international cooperation should be "as open as possible, as closed as necessary."

Three different stories. One underlying shift. For three decades, internationalization operated as a volume discipline. Its metrics were enrolment, revenue, partnerships signed, rankings. Its governance lived in admissions and marketing. Its assumption — rarely stated, always present — was that the geopolitical and regulatory environment was stable, and the demand curve permanently rising. That regime is ending.

What is replacing it is a risk-and-sovereignty discipline. Its metrics are exposure, dependency, credibility, duty of care, and strategic alignment. Its governance crosses the research office, general counsel, provost, and board risk committee. Its vocabulary — responsible internationalization, de-risking, research security, dual-use screening — is standard in Brussels and the Five Eyes capitals, and emerging in Beijing.

The field's most authoritative voices have named the transition. Simon Marginson at Oxford has called it an ontological transition. Hans de Wit at Boston College has warned the sector against dismantling internationalization in the course of reckoning with it. The IAU's 6th Global Survey documents how unevenly leaders across more than 100 countries are reading the shift. Scholarship from Moscovitz and Sabzalieva on the new geopolitics, Oleksiyenko on post-Soviet prestige economies, and Chankseliani at Oxford on student mobility is giving the transition its theoretical frame.

This is not a crisis. It is the structural maturation of internationalization into a governance function — as financial compliance matured inside banking after 2008.

Once a domain is reframed as sovereign risk, the playbook changes — permanently. The question every Vice-President International should be asking this week: are we still running a volume-era playbook in a sovereignty-era environment?

Over the next six weeks, this series traces the transition across five regions — North America, Latin America, Sub-Saharan Africa, China, and the Middle East — and closes with what institutions must build to navigate it.

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Next: North America, where the mental map of 2026 student decisions has shifted, and the places that were preferred became unplannable.

PART TWO OF SEVEN

The mental map shaping 2026 student decisions has shifted: "going to North America" is no longer a default safe choice.

Unplannable

Why North American universities are solving the wrong problem.

The mental map shaping 2026 student decisions has shifted: “going to North America” is no longer a default safe choice. It is being redrawn not because students prefer elsewhere, but because the places they preferred became unplannable.

In the US, the mechanism was visa chaos. On May 27, 2025, the State Department paused F, M, and J student visa interviews to expand social-media vetting. By spring, the American Immigration Lawyers Association counted over 4,700 student visa records revoked or under review, with appointments cancelled after travel. At Augustana College, admitted Ghanaian students were deferred from fall 2025 to spring 2026, with delays extending. At no point could a family know whether an offer would translate into a seat on a plane.

In Canada, the mechanism was policy. In January 2024, IRCC introduced a national cap on study permits and a Provincial Attestation Letter requirement. The intended 35 percent cut became a 45 percent collapse. A further 10 percent reduction followed in 2025. Two decades building Canada’s reputation as the predictable alternative; two years of policy to reshape it.

The reflex response targets the wrong problem. Institutions see softer applications, delayed yield, redirected interest, and reach for the tools of attractiveness: better marketing, sharper value, more scholarships, warmer welcomes. Demand has not evaporated. Families are prioritising a low-risk start over institutional prestige.

What collapsed is plannability — the structural property that lets a family build a multi-year strategy around an offer.

It is not a feeling. It is the sum of predictable visa timelines, stable post-study work rights, durable tuition policies, and reliable family pathways. When any one becomes contingent on political weather, students redirect to predictable competitors. The UK now decides most student visas within three weeks — the certainty North America stopped offering.

This is why marketing fails. It addresses preference; plannability is institutional credibility — the belief that the rules in October will still apply in April. Trust in a destination system is asymmetric: it erodes instantly at a closed visa window and rebuilds only through years of policy stability. Recovery comes not from campaigns but from engineering risk mitigation into the admission model — guaranteed deferrals, fee locks, alternate intakes, remote starts, and advocacy for the policy stability the international model depends on.

Preference can be bought with scholarships and branding. Credibility must be structurally guaranteed.

Next: Latin America, where students recalculating their map of North America are reshaping an entire region’s outbound mobility.

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PART THREE OF SEVEN

Something is shifting in the geography of aspiration — whether structural realignment or the opportunistic filling of a temporary vacuum is the question.

The *Sovereign Host* Question

An analysis of Latin American student mobility.

Something is shifting in the geography of aspiration — though whether it constitutes structural realignment or the opportunistic filling of a temporary vacuum is a question this analysis cannot yet settle with confidence.

For decades, the dominant architecture of Latin American student mobility was built on a relatively stable premise: North America and Western Europe occupied the apex of institutional prestige, and departure northward was the unmarked default of ambition. That premise was not natural. It was constructed — through decades of Fulbright exchange architecture, Erasmus+ program design, English-language academic publishing dominance, and the cultural gravity of European and North American university life as imagined from a distance. The mobility system that resulted was less a market than a dependency structure, and understanding its current disruption requires first acknowledging how deliberately it was built.

That structure is now under stress. Tightening U.S. visa regimes and accelerating affordability constraints are redirecting outbound flows toward European alternatives, with Spain absorbing a disproportionate share of this displaced demand. The students making these decisions are not, by the available evidence, primarily responding to academic quality differentials. They are responding to a more immediate calculus: post-study work rights and labour-market access. This matters because it suggests the current shift may be structurally fragile — Spain's labour market absorption capacity for non-EU graduates is itself finite, and European immigration politics are not trending toward greater openness. One should hold the "pivot to Europe" hypothesis against its alternative: that this is a pressure-relief valve, not a permanent reorientation, and that without active intervention, flows will simply seek the next available destination rather than return home.

The question of whether Latin America can become a sovereign academic host — retaining rather than exporting its intellectual capital — must be approached as a systemic problem, not a policy gap.

And systemic problems require, first, an honest accounting of how the system currently works. The region is not one system. It is a loose confederation of at least three distinct subsystems with different internal dynamics: the large domestic-market anchors (Brazil, Mexico, Argentina), whose university sectors are sufficiently vast to generate internal stratification and partial self-sufficiency; the mid-tier aspirational states (Chile, Colombia, Peru), whose institutions compete internationally while managing significant domestic funding volatility; and the smaller, externally-oriented economies (Ecuador, Bolivia, Paraguay, Uruguay, Central American nations, and the Dominican Republic), whose internationalization strategies are almost entirely dependent on bilateral agreements and foreign scholarship programs.

Interactions within each subsystem are more powerful than interactions between them — which is precisely why the 2019 Buenos Aires Convention has ratified slowly and unevenly. Latin American institutions historically deprioritise South-South integration, favouring extra-regional partnerships with the Global North instead, and this structural preference has confined the Convention's adoption to six signatories representing approximately 15 percent of the region.

Even where states have moved toward adoption, the Convention encounters what the 2019 UNESCO IESALC mobility report identifies as the “autonomy shield” — the legal frameworks granting public universities independent authority over the recognition of foreign credentials, which means that treaty obligations at the diplomatic level do not automatically penetrate institutional practice. The rector managing a budget crisis has neither the mandate nor the resources to implement what was agreed in Buenos Aires; 74 percent of Latin American institutions report that their general budgets are severely deficient for internationalization efforts, and credential recognition reform competes — almost always unsuccessfully — against payroll, infrastructure, and accreditation compliance.

The governance failure documented in the empirical literature is real but requires precise framing. No country in Latin America currently maintains a national public policy that coherently defines a sovereign internationalization strategy. Institutions overwhelmingly declare internationalization a strategic priority; almost none possess the financial and legal architecture to execute it at scale.

The principal-agent problem at regional scale

But the standard diagnosis — that Latin American universities simply “lack capacity” — risks defining the problem by the absence of its preferred solution. The deeper behavioural pattern is a principal-agent problem: the incentives of individual institutions (rankings, visibility, bilateral partnerships with Northern universities, incoming short-term programs) are systematically misaligned with the collective interest in building a regionally self-sustaining knowledge ecosystem. Attracting a cohort of European students on a two-semester exchange program is measurable and prestigious; co-developing a regional credit-recognition protocol is slow, unglamorous, and politically costly. Institutions rationally choose the former. The system suffers.

Here is the reversal the mobility literature tends to avoid: the very institutions positioned to become sovereign hosts — Colombia’s Universidad de los Andes, Brazil’s USP, Mexico’s UNAM — are also the institutions most thoroughly integrated into Northern academic circuits, whose faculty are trained in Northern PhD programs, whose research funding is co-produced with Northern partners, and whose prestige is validated by Northern ranking systems. Latin American academic excellence, in its current form, is structurally oriented outward.

The birth of the regional academic host may require a partial death of the internationally recognised institution as it currently exists.

The emerging instruments are real. The New Regional Convention (UNESCO IESALC, 2023) provides the legal skeleton for intra-regional credential recognition. QS Latin America & Caribbean 2026 rankings register genuine institutional improvement in Chile and Ecuador. Targeted scholarship programs in Brazil and Mexico are beginning to attract Global South students who cannot afford or access Northern alternatives. But instruments are not systems. A skeleton requires musculature, circulation, and — most importantly — the political will of individual states to fund what is invisible and slow.

What the data cannot capture, but what any honest analysis must name: behind every "outbound flow" is a person making a decision under material constraint. The Colombian student denied a U.S. visa spends weeks reconstructing a life plan. The Brazilian professor building an English-taught master's program does so without a budget line for international student support services. The Paraguayan ministry official tasked with implementing Buenos Aires Convention ratification does so as a secondary assignment, without dedicated staff. These are not anecdotes decorating a structural argument. They are the structural argument — the granular, human-scale costs of a system built for export rather than retention.

Whether Latin America finally builds the infrastructure to reverse that orientation depends less on the elegance of its regional frameworks than on whether individual states decide to fund what is unglamorous, domestic, and slow. The evidence suggests they have not yet made that decision. Whether the current disruption in Northern mobility pathways creates sufficient political pressure to force it remains, genuinely, an open question.

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PART FOUR OF SEVEN

There is a particular kind of expertise that comes from having been on both sides of a table without fully reckoning with what that means.

The *Clause* Nobody Negotiated

Sub-Saharan Africa, brain drain, and the contracts behind it.

There is a particular kind of expertise that comes from having been on both sides of a table without fully reckoning with what that means.

I spent fourteen years in the international offices of Canadian research universities — institutions that are, in the architecture this essay describes, among the Northern counterparts on the other side of the partnerships. I helped facilitate agreements, create MOUs, and structure collaborations with institutions in the Global South. I saw the contract language around intellectual property and data residency. I worked within those terms and helped make the partnerships function. I did not, during most of those years, think carefully enough about what those clauses meant for the researchers at the other institution after the partnership ended. I am writing this partly to think through what I did not examine then.

The International Association of Universities' most recent global survey names brain drain as the paramount societal risk of internationalization for Sub-Saharan African institutions. Three quarters of African higher education leaders identify it as the defining threat. The anxiety is real. But the system producing it was not inevitable, and understanding it requires going back further than the current statistics.

The defunding that built the dependency

The contemporary partnership architecture between African and Northern universities was largely assembled in the 1980s and 1990s, during the structural adjustment era. When the World Bank and the IMF conditioned loans on public expenditure reductions, African university budgets contracted sharply — research infrastructure deteriorated, faculty salaries fell, and the capacity to fund doctoral training domestically collapsed in many countries. Into this gap came externally funded partnerships: Northern governments, foundations, and research councils offering funding, equipment, and training in exchange for access to African research sites, patient populations, field data, and co-authorship.

The terms were not designed to be exploitative. Many of the people who designed them were genuinely trying to help. But they were designed by institutions with legal infrastructure and research management offices, for institutions that had none of those things. This is the feedback loop the brain drain conversation almost never traces: the defunding that created the dependency, and the dependency that normalised the terms.

By 2024, over 800,000 students from Africa were enrolled in degree programs outside their home countries. These are overwhelmingly self-funded, self-directed movers — students whose families pooled resources to send someone somewhere with better infrastructure and stronger employment outcomes. Treating their movement as a problem to be solved rather than a choice to be understood has not served African higher education policy well. The framing of brain drain as a border-crossing problem has consistently misdirected attention — toward retention incentives and repatriation programs — and away from the system that shapes what knowledge African researchers produce, and who owns it, regardless of where those researchers are standing.

The contractual story is a different and smaller story. But it is the one that most directly determines the long-term architecture of African knowledge production. Consider the specific weight of this moment. A research director at a mid-sized East African university — someone who has built her career through genuine intellectual effort, who has spent years cultivating the institutional relationships that made this partnership possible — receives a partnership agreement drafted by a legal team that spent weeks on it. She has two weeks to respond. She has three other agreements pending, a grant report due, a faculty meeting she cannot reschedule. She has no budget line for external legal review. She signs.

What she has agreed to will govern who publishes the results, where the data resides for the next decade, whose name appears first on the resulting papers, and whether her institution can build on these findings independently after the partnership ends.

This is not a failure of her intelligence or her institution's ambition. It is the end point of a system built, over forty years, to be navigated from one side.

Here an honest reader will object: is it not expected that the funder determines the terms? If a Northern research council is financing the partnership, why should Northern authorship norms not apply? The answer is not that Northern funders have no legitimate claim on the outputs of research they finance. It is that the current terms frequently exceed what legitimate funder interests require — assigning data residency to servers outside the continent, restricting African partners from publishing independently, placing Northern researchers as first authors on research conducted primarily at African institutions.

A *BMJ Global Health* review of 7,100 African health research articles found that 13.5 percent had no local co-author at all. In collaborations with top United States universities, the proportion featuring an African first author fell to 23 percent. The Council on Health Research for Development has traced the cause: most Global South institutions enter these negotiations without specialist legal expertise, structurally unable to propose alternative terms against heavily lawyered counterparts. These statistics are not a story about individual career choices. They are the downstream output of a system whose terms were set in the 1980s and have not fundamentally changed.

A different register: the Luban model

The emergence of China as a major host of African students — second only to France — has changed the geometry without resolving the underlying dynamic. More interesting than the student hosting is the Luban Workshop model: vocational training centres established on African soil, financed and designed by Chinese partners, training workers for enterprises operating on the continent. The training does not require the student to leave. Whether the Luban model serves African development interests or Chinese labour supply chains — and the honest answer is probably both, in proportions that vary by sector and country — it addresses a real failure that the Northern partnership model does not: the assumption that the training must happen elsewhere, under Northern terms. The sovereignty questions it raises are different in configuration. Who writes the curriculum, who certifies the credential, who employs the graduate — these are live questions, but they are being asked about training conducted in Africa, for workers who remain in Africa. That is a different register entirely.

What is more tractable than repatriation, and more honest about how academic careers actually work, is the recognition that physical presence and institutional contribution can be separated. Approximately 30,000 Africans holding doctoral degrees currently reside outside the continent. Morocco's National Center for Scientific and Technical Research has been formalising agreements with diaspora scientific networks in France and Germany, making expatriate researchers part of the country's research infrastructure through structured collaboration rather than requiring return.

This does not solve the contractual problem. But it challenges the territorial assumption embedded in the brain drain metaphor — that a researcher who has crossed a border is a researcher who has been lost. If the institution has built the relational and legal infrastructure to keep its diaspora contributing, the border becomes less decisive than the contract.

The measure of a research system's health is not how many of its trained people remain within its borders. It is whether the research conducted in partnership with external funders is attributed honestly, owned in ways that allow institutional knowledge to accumulate, and capable of compounding into capacity.

That is the question the retention framing forecloses — because it counts departures when it should be reading contracts. And the contracts, in most cases, were written by one side of the table, under conditions that the other side did not choose and has not yet had the collective infrastructure to change.

I know this because I spent fourteen years helping those partnerships work — facilitating the agreements, building the MOUs, reading the IP clauses — without asking, carefully enough, what they meant for the people on the other side of the table after I left the room.

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"The contracts, in most cases, were written by one side of the table — under conditions the other side did not choose and has not yet had the collective infrastructure to change."

INTERLUDE
IV → V

PART FIVE OF SEVEN

The host appeared in those announcements the way a landlord appears in a press release about a new restaurant – a presence to be acknowledged, not a counterparty whose interests would eventually shape the building.

What the *Host* Wrote Back

China, India and the Gulf rewrite the terms of engagement.

For most of the 2000s, when a Western university announced a branch campus in Asia or the Gulf, the announcement read like a real estate transaction. Square meters secured, ribbon cut, rector flown in.

The host appeared in those announcements the way a landlord appears in a press release about a new restaurant — a presence to be acknowledged, not a counterparty whose interests would eventually shape what the restaurant became. That framing was always partial. It has now collapsed.

The regulatory frameworks emerging across China, India, and the Gulf are not, as a class, a reaction against Western higher education. They are the host states finally writing the contract that every other sector — energy, telecommunications, banking, retail — required them to write decades ago. The strange period was not the current one. The strange period was the brief decade and a half during which universities were permitted to cross borders without negotiating governance.

It is worth saying clearly, before the analysis goes further, that the universities crossing those borders were not arriving empty-handed. They were the architects of the modern global research university model — the doctoral training architecture, the peer-review apparatus, the laboratory norms, the institutional culture of academic freedom — and that contribution is real and continuous. Many of the host institutions now writing more demanding contracts were themselves shaped, in their faculty composition and pedagogical models, by partnerships with Western universities over the past 150 years. The shift described here is real, but it is not a moral verdict. It is a structural change in how host countries are choosing to govern a system Western universities helped build and in which they remain materially significant.

It should also be said that the asymmetry of the original arrangement was congenial to the foreign signatories: the volume era was lucrative, the compliance costs were low, and few Western universities pushed for tighter governance terms while those terms ran in their favour.

The system is not one system. The interactions inside each of these subsystems are stronger than the interactions between them, and each requires its own diagnosis.

The Chinese subsystem · governance integration

The Chinese subsystem operates through governance integration. The 2021 amendment to the regulations governing non-public education requires a Communist Party representative on the decision-making body of any non-public school. Partnership-specific rules require Chinese nationals as principal administrators, Chinese members holding at least half of board seats, and mandatory courses on the Chinese constitution and ethics. The condition is governance, not finance. A Western university that meets it is operating; one that cannot is not.

The high-profile terminations of the Georgia Tech Shenzhen Institute in 2024 and the Michigan–Shanghai Jiao Tong Joint Institute in 2025 are often read as evidence of these Chinese rules pushing Western universities out. The contractual reading is more specific, and runs in the opposite direction. Both terminations were driven primarily from the United States side — Tianjin University's placement on the U.S. Commerce Department Entity List in December 2020, sustained pressure from the House Select Committee on the Chinese Communist Party throughout 2024, and the federal indictment of five University of Michigan–SJTU students in connection with a 2023 incident at a Michigan military base. These were partnerships that could not, under revised terms, satisfy both their Chinese host and their home country's research-security regime at once. Both sides moved, in opposite directions, on terms neither could have written into the original agreement.

The Indian subsystem · recognition

The Indian subsystem operates through recognition. For most of the past four decades, India did not block foreign universities from entering; it blocked them from being recognised. Degrees awarded by foreign providers carried no automatic legal standing, which meant a graduate of a foreign-affiliated program in India could not, without further accreditation, qualify for civil service positions or sit national professional examinations. This was not regulatory inertia but deliberate design. India had a large, politically organised domestic higher education sector whose graduates competed for the same slots, and successive governments judged that opening the competition was not worth the disruption.

What changed was the National Education Policy 2020, which committed the country to internationalise higher education on terms drawn from the broader *Atmanirbhar Bharat* (self-reliant India) doctrine of the post-2014 period. That doctrine treats internationalization not as opening to the world but as building Indian capacity sufficient to receive the world on Indian terms. The 2023 University Grants Commission regulations permitting independent foreign campuses are the operational expression. They are described in the press as a liberalisation, and they are. Foreign higher education institutions ranked in the global top 500 may now establish autonomous Indian campuses with discretion over admissions, hiring, and fee structure. The constraints are narrower than the older licensing labyrinth they replaced: eligibility filtered by ranking, regulatory approval through the UGC, and compliance with India's foreign-exchange and foreign-contributions law. The opening is real. It is also a recalibration of which terms remain non-negotiable, and most of those terms are Indian.

The Gulf subsystem · demographic conditioning

The Gulf subsystem operates through demographic and financial conditioning, but the GCC, Egypt, and the wider Eastern Mediterranean are different regulatory environments and need to be read separately. The early 2000s model in Dubai's Knowledge Park offered foreign ownership and profit repatriation on the implicit understanding that the populations being served were expatriate and the governments paying the infrastructure costs were content with that arrangement.

Two things changed across the region. The first was the recognition that the volume era had produced graduates whose skills did not align with national labour-market needs. The second was the reassertion of state interest in the demographic composition of the student population.

Egypt's 2018 international branch campus law is the most explicit version: no less than half of enrolled students at any foreign branch must be Egyptian, mother-university faculty must work alongside locally and internationally hired staff, and a small annual levy on tuition revenue, between one and two percent depending on the source consulted, recovers state services and infrastructure costs. Saudi Arabia's October 2023 Executive Regulations for foreign university branches, framed by Vision 2030, set another version, with the University of New Haven receiving the first Council of Ministers approval in 2025 for a Riyadh campus opening in 2026. Recent regional volatility, including Iranian missile activity and the wider instability in the Eastern Mediterranean, has added board-level scrutiny that has nothing to do with academics. Insurance, evacuation planning, and physical security are now standing items in any discussion of new Gulf branch operations.

Read this way, the three subsystems do not share a unified motivation, and treating them as a single phenomenon flatters the analyst more than it illuminates the system. The Chinese case is about ideological alignment under a state that has never disguised its position on cultural sovereignty. The Indian case is about credentialism in a country with a vast domestic labour market that wants graduates to be legible inside its own institutions. The Gulf case is about the second-order consequences of a first-generation educational free zone that produced outcomes the host states eventually decided they wanted to manage. Three separate negotiations are happening, not one global one.

What the new regulations are clarifying, across all three, is something less dramatic than the architects-to-vendors framing suggests, and more interesting.

Western branches and joint institutes were typically not building the host country's higher education system; they were appended to it, serving expatriates, serving an elite domestic population, granting prestige to a local degree without altering the host system's underlying structure. The host country's actual higher education system — the public universities, the technical colleges, the polytechnics — was running in parallel, often underfunded, sometimes resentful of the resources flowing to the foreign-affiliated programs next door. The new contracts are the host system reaching back across that parallel line and saying: if you are going to be here, you are going to be inside our system, on terms we set, and your students and our students will be in the same room. That is not a demotion of the foreign university. It is the end of the parallel line.

The line goes the other way

The line goes the other way as well. The same hosts writing contracts to the inbound North are now writing contracts as outbound senders. China's Soochow University established its Lao campus in 2011, the country's first overseas university branch; Xiamen University Malaysia, the first state-backed Chinese branch abroad, opened in 2016 and now ranks first in Malaysia by Nature Index research output. India's National Education Policy 2020 frames outbound expansion as the same doctrine that opens India inbound: IIT Madras Zanzibar opened in November 2023 as the first IIT abroad, IIT Delhi Abu Dhabi followed in September 2024, and Bhutan and Morocco have since requested additional campuses.

These South-South architectures are not built on the assumptions that built the Northern branches they sit alongside. They are anchored in different doctrines — Belt and Road, *Atmanirbhar Bharat* — aimed at different geographies, on epistemic and geopolitical premises the volume-era framework did not anticipate. The framing of this period as a Western retreat misreads it. Sovereignty in higher education is not only the right to refuse a contract from the North; it is the right to write a new one to the South.

What the abstraction conceals is the texture of the people inside it. Three illustrative composites, drawn not from any single case but from the kinds of situations now recurring across the three subsystems. The Chinese doctoral student admitted to a joint institute in 2019, told midway through the program that the institute is winding down, who must now decide whether to complete the degree under altered terms or transfer at significant personal cost. The Egyptian assistant professor hired into the local quota, whose tenure case will be evaluated under criteria written in two languages and two academic cultures simultaneously. The Dubai-based program manager whose 2026 job description includes coordination with embassy security advisories and a quarterly review of evacuation logistics. These are not decorative anecdotes. They are the structural argument — the human-scale residue of a system whose contracts the Northern signatories did not, in most cases, fully read with these scenarios in mind.

Whether the universities currently operating under these terms will remain depends on a question that contracts cannot answer cleanly: whether the value the host derives from the partnership remains worth the political cost of hosting it, and whether the value the foreign university derives remains worth the compliance burden of operating it. Neither side fully knows the answer. The architecture between Northern universities and their Asian and Gulf hosts is being renegotiated mid-flight, on terms that most of the original signatories did not anticipate and would not have accepted had they been written into the original agreements. That renegotiation will continue. Some partnerships will survive it. Many will not. The ones that survive will not look like the ones that were signed.

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PART SIX OF SEVEN

The contract had been written for a world in which only one sovereignty mattered to the negotiation. That world is gone.

After the *Asymmetry*

The simultaneous reordering of both ends of the relationship.

When a Northern university signed a partnership with a Chinese counterpart in 2015, the lawyers in the room spent weeks on the host-country terms. Who would own the data. Whose accreditation would govern the degree. How disputes would be resolved.

What almost no one was asked to price was the other half of the equation — the home government's posture toward the partnership over its ten- or twenty-year life. Washington was treated as a stable backdrop, not a counterparty whose interests could shift. By 2024, that partnership was being unwound, not because Beijing had changed its terms, but because Washington had. The contract had been written for a world in which only one sovereignty mattered to the negotiation. That world is gone.

For most of three decades, the architecture of international higher education was built on a quiet asymmetry. Northern universities and Northern governments shaped the terms of cross-border partnerships, set the prestige hierarchies that determined which universities counted, and decided through immigration and research policy who could move where. Southern institutions — with the notable exception of elite systems in China, Brazil, the Gulf, and parts of Southeast Asia, which exercised substantial agency long before this moment — operated inside terms they had not written. The volume era — the period the field has just lived through — was less a market than a configuration of power, and the configuration ran in one direction. As the dominant logic governing how most institutions set their internationalization priorities, that configuration, too, is receding.

The Northern reordering

What this series has documented across five regions is the simultaneous reordering of both ends of that asymmetry. The Northern reordering is the part the practitioner literature has paid most attention to. According to the American Immigration Lawyers Association, the American visa system saw over 4,700 student visa records revoked or placed under review by spring 2025; the Canadian study-permit cap, announced by IRCC in early 2024 and implemented throughout the year, cut new study permit approvals by roughly 45 to 48 percent against the prior year; the Council of the European Union's May 2024 Recommendation on enhancing research security formalised a Union-wide shift from open scientific cooperation toward the principle of being as open as possible and as closed as necessary; the legal architecture that has hardened across the Five Eyes since 2021 has outpaced most universities' compliance capacity. The Northern university is now operating in conditions its volume-era playbook did not anticipate.

The Southern reordering

The Southern reordering has received less attention and is arguably more consequential. Here the picture is neither uniform nor simply the inverse of Northern decline. China has moved from a major source of outbound students to a major host of inbound ones and a research producer whose output now rivals that of the United States by several measures — and it is simultaneously a Global South power and a nascent research hegemon with its own asymmetric ambitions. The Indian National Education Policy of 2020 reframed internationalization explicitly as a project of building Indian capacity to receive the world on Indian terms.

Latin American institutions, even where regional integration remains slow, are increasingly explicit that bilateral agreements with the Global North must serve domestic strategic priorities rather than the reverse. Gulf states — wealthy hosts whose leverage has always been material rather than subordinate — have transitioned from passive landlords of educational free zones to active managers writing demographic and labour-market quotas into branch campus agreements. African institutions, slowly and unevenly, are beginning to question the contractual terms a generation of partnerships were signed under. None of these are coordinated. All of them point in the same direction.

The scholarly literature has had vocabulary for this shift for some time. Marginson and Rhoades' glonacal heuristic, more than two decades old, named higher education as something that runs simultaneously across global, national, and local scales rather than inside single state containers. What Moscovitz and Sabzalieva have more recently added is the recognition that states across both hemispheres are now active shapers of academic activity rather than passive containers of it, and that the strategic interests of those states visibly drive policy decisions on both sides. Maguatcher and Chen describe the resulting environment as a multipolar order defined by ideological polarisation and intense competition for technological preeminence.

What is new in 2026 is not the theory. It is that the Southern half of the equation is now exercising the agency the theory had already attributed to it.

The opening this creates is real, and it is the central question for the next decade of international higher education in the Global South. The North's volume-era model was not just shaped by power asymmetry; it produced consequential failures even inside its own terms. It optimised for enrolment numbers and ranking positions over educational outcomes whose evidence base remains, despite decades of effort, surprisingly thin. It treated partnerships as deliverables rather than as relationships whose value compounds slowly. It allowed the marketing function to overtake the academic function in too many institutions. It assumed that more international students, more MoUs, and more branch campuses constituted a strategy. The literature has been raising these critiques for at least five decades. Most institutions, North and South alike, have heard them and continued anyway, because the volume era's incentives ran in the other direction.

The Southern institutions now positioned to lead have a choice the North did not get to make in the same way. They are entering a sovereignty era with the potential benefit of having watched what the volume era produced. They can — and this is the productive part of the asymmetry inverting — build internationalization on terms that the literature has long argued for but the volume era systematically did not reward. They can insist on understanding what internationalization actually does for their students, their faculties, and their countries before scaling it. They can be honest about where the evidence is thin. They can refuse to mistake activity for outcome. They can negotiate partnerships as equals committed to a common project of knowledge, rather than as junior partners gratefully accepting Northern terms.

The honest reading of the volume era is that the failures inside it were rarely the dramatic kind that produced headlines. They were the quieter kind. Partnerships that existed on paper but generated nothing of substance. Programs whose claims about intercultural competence outran the evidence base. Recruitment strategies that brought students into systems that were not actually ready to support them. MoUs signed at the conclusion of state visits that no one inside the institution had the bandwidth to operationalise. Branch campuses launched with announcements written like real estate transactions rather than academic commitments. None of these failures registered loudly. All of them accumulated. The North did not learn from them cheaply. It would be a serious waste for the South to pay the same price a second time.

Whether the Global South takes the opening is not predetermined. The same incentives that produced the volume era's pathologies in the North — rankings, visibility, marketing budgets that grow faster than academic budgets, ministerial pressure to announce partnerships — are operative in Southern systems too. The Latin American pattern, in which institutions rationally prioritise prestige-building bilateral agreements with the North over the slower work of regional integration, is one version of the same temptation. The early evidence on China's outbound branch campuses, on India's overseas IIT expansion, and on Gulf states' transnational ambitions will indicate within a few years whether the South is building a different model or scaling a familiar one under new flags.

The future the literature has been imagining for five decades — partnerships between Northern and Southern institutions structured as collaborations between counterparties with distinct but compatible commitments to advancing knowledge — is now within reach in a way it has not been before. The same sovereignty era that opens negotiating space between genuine counterparties also, however, generates countervailing forces: research security frameworks that restrict what can be shared, compliance burdens that favour large and well-resourced institutions, and geopolitical polarisation that can harden into academic nationalism. The structural possibility is real; whether it is seized, and whether the sovereignty era produces genuine collaboration or merely a new set of asymmetries under different flags, remains an open question.

The IAU's most recent global survey documents how unevenly leaders across more than a hundred countries are reading this moment, and how few institutions have yet moved their governance architecture to match what the moment requires. The gap is the opportunity.

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PART SEVEN OF SEVEN

For six weeks this series has tracked a transition the field has been narrating in fragments. They are not separate stories. They are the same shift, breaking the surface in different places.

The *Architecture* of Sovereign Internationalization

From diagnosis to architecture.

For six weeks this series has tracked a transition the field has been narrating in fragments. Visa caps in Ottawa. F-1 vetting backlogs in Washington. China's 2021 amendments to non-public education governance. India's 2023 UGC regulations. Egypt's 2018 branch campus quota law.

Each story has been reported as its own crisis, on its own timeline. They are not separate stories. They are the same shift, breaking the surface in different places. The shift is this: internationalization has stopped being a volume discipline and has become a discipline of alignment under constraint. The next decade will not reward the institutions with the most partnerships or the strongest declared values. It will reward the institutions that have built the architecture to operate as credible counterparties, that have allocated their international activity to commitments they can sustain, and that recognise — without illusion — what level of counterparty they currently are.

What sovereign internationalization actually is

Sovereign internationalization is the discipline of aligning three things the volume era kept separate: *strategic interest* — what the institution is trying to accomplish through international activity; *institutional capability* — what it can actually deliver, govern, and absorb; and *environmental durability* — whether the terms of its commitments will survive political weather on both ends. Sovereignty here is not a state attribute and not a nationalist posture. It is the capacity of a university to act as a credible counterparty in conditions where state interests on both ends of every partnership are actively shaping the space in which the partnership operates.

Strategic interest, ten years ago, was a paragraph in a strategic plan committing the institution to "becoming more global." It did not specify which countries, for what reasons, with what trade-offs. The 6th IAU Global Survey, covering 722 institutions across 110 countries, reports that 77 percent of institutions now classify internationalization as a high priority and 77 percent have embedded it in a formal strategy. The volume era's vocabulary has matured. What has not matured at the same pace is the specificity. A credible strategic interest in 2026 names the scientific or educational return that justifies each major partnership, what the institution is prepared to forgo to keep it, and what would cause it to exit.

Institutional capability is the property the volume era systematically underpriced. The same IAU survey finds that 60 percent of institutions cite insufficient financial resources as the primary internal obstacle to internationalization. The execution gap is structural, not anecdotal. The volume era allowed institutions to sign documents that exceeded their capacity to operate because the documents were ceremonial. The sovereignty era is exposing the gap because the documents are now consequential.

Environmental durability is the property the volume era did not measure at all. The architecture of international higher education was treated as a stable backdrop. That backdrop is now an active variable. The European Centre of Expertise on Research Security is expected operational by mid-2026. The Council Recommendation on enhancing research security took effect in 2024. The Five Eyes "Secure Innovation" guidance launched in October 2024. None of these were predictable in 2016.

> *The discipline is the alignment of the three. A research-security policy without the institutional capability to implement it is theatre. A regional integration strategy without strategic clarity about what it serves is a press release.*

A well-funded partnership office working on commitments whose terms cannot survive an election in either country is wasted capacity.

What this means for Northern institutions

The conditions Northern institutions need to work towards are not a checklist. They are properties of the institution that make the discipline possible.

The first is *strategic clarity* at a level the volume era did not require. Most Northern universities can describe their international activity at the level of region and partner. Fewer can describe what return each partnership is meant to produce, and against which alternatives it was selected.

The second is *absorptive capacity honestly assessed.* The IAU survey reports that 70 percent of institutions saw partnerships increase over the past five years, while 42 percent identify the compounding workload on academic and administrative staff as the most severe institutional risk of internationalization. The data describes what the sector already knows informally: institutions hold more partnerships than they can steward. The honest move is to count what the institution can sustain at full quality and reallocate accordingly.

The third is *governance integration.* In the volume era, international activity sat inside admissions and marketing. In the sovereignty era, it requires standing presence in the research office, general counsel, provost, and board risk committee — not as occasional consultation, but as integrated decision-making. The enforcement challenge is real: universities are polycentric, and a long-standing faculty-level MoU producing occasional exchanges will not be terminated by central administration without friction. Governance integration is the design problem; the enforcement problem requires that the discipline of alignment be carried by senior leadership consistently enough that faculties recognise the framework rather than experience it as periodic intervention.

What this means for Southern institutions

The conditions are different because the starting capability is different.

The first is *honest self-assessment of capability* — what the institution can deliver before it negotiates terms it cannot operationalise. The political pressure runs the opposite way. Ministers want partnerships announced. Boards want visibility. Resisting this long enough to refuse partnerships whose terms exceed institutional capacity is the first move of the sovereignty era. The partners worth having will notice the difference.

The second is *capability strategically built, not improvised.* Legal infrastructure to negotiate complex research partnerships, research-management capacity to administer multi-institutional grants, data-governance systems that allow the institution to host rather than merely contribute — these are the determinants of which partnerships the institution can enter at all. Most Southern institutions cannot afford to build this alone. The undervalued instrument is regional cooperation: shared legal templates, shared research-management training, shared data-governance frameworks across a regional consortium.

The third is *strategic discipline about partnership selection.* The IAU survey records a striking finding: Latin America and the Caribbean, North Africa and the Middle East, and Sub-Saharan Africa are universally considered the least important partnership regions — including by each other. This is the principal-agent problem from Part III of this series, now visible at global scale. A mid-sized Southern institution that signs ten low-substance MoUs with European universities for visibility is operating in the volume era. The same institution that signs three high-substance agreements with peer institutions in its own region — and uses them to build the capability that will eventually make it a credible counterparty to a top European university — is operating in the sovereignty era. The first strategy looks more impressive in the annual report. The second compounds.

The honest cost

The sovereignty era will produce fewer partnerships and more substantive ones. The MoU portfolios most universities currently maintain will shrink, in some cases significantly. The broad-spectrum mobility agreement signed at a state visit and never operationalised, the dual-degree program announced before the curriculum was designed, the research collaboration whose data-governance terms neither side examined carefully — these will not survive the new arithmetic. Most of them should not.

The communications burden of the new discipline is not trivial. The volume era sold internationalization to boards, governments, and parents as unambiguously good. The sovereignty era requires senior leaders to explain why partnerships are fewer, why some countries are deprioritised, and why certain collaborations are being terminated. The institutions that develop the vocabulary to do this honestly — without retreating into either celebration or apology — will move through the transition faster than those that do not.

Close

The question every senior leader should be asking is not whether the institution has a sovereignty strategy. The question is whether the alignment exists — between what the institution wants to accomplish, what it can actually deliver, and what the environment will permit to endure. Where the three are aligned, the institution is operating in the new discipline. Where they are not, the language of sovereignty is decorating a volume-era operation.

The failure mode worth naming is the opposite one: the discipline of alignment is not a license for premature withdrawal, and the sovereignty era will be as damaged by excessive caution as by residual volume thinking.

What replaces volume is not retreat. It is the harder, narrower, more deliberate practice of internationalization that is worth defending.

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Societās Partnerships S.A. is a specialist higher-education advisory firm incorporated in Panamá City in 2024. The firm advises universities, ministries, multilateral bodies, and donors on internationalization strategy in conditions of geopolitical bifurcation.

Its proprietary assets include the *Organizational MRI*, a fifty-five-indicator diagnostic framework for assessing institutional internationalization capacity; the *Geopolitical Partnership Compliance Register (GPCR)*, a rules-based engine that stress-tests international research partnerships against export controls and jurisdictional risk; the *Sovereign Internationalization Framework*; and *The Gated Republic*, a 2026 white paper on the new regulatory architecture of global academic engagement.

The firm's practice concentrates on Latin American research universities, Canadian comprehensive and U15 universities, and higher-education consortia, with multilateral research credentials anchored by commissions from the International Science Council.

What replaces volume is not retreat.
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