2026 EDUCAUSE Horizon Report®
Teaching and Learning Edition

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EXECUTIVE SUMMARY

The *2026 EDUCAUSE Horizon Report | Teaching and Learning Edition* reflects a higher education landscape shaped by intensifying pressures around value, trust, and transformation. Institutions are navigating declining enrollments and constrained resources while responding to rapid advances in artificial intelligence that are reshaping teaching and learning and the relationships at the core of the higher education experience. Growing concerns about data privacy, environmental sustainability, and regulatory landscapes are redefining institutional priorities and operations. These intersecting forces underscore a sector in transition where long-standing assumptions are being tested and new models of teaching and learning are beginning to emerge.

This year's report captures these dynamics through an analysis of established trends and the introduction of signals of change. Using the structured STEEP framework, which includes social, technological, economic, environmental, and policy domains, a global panel of experts prioritized the trends most likely to influence teaching and learning at scale. These trends are paired with established examples of practice to illustrate how they are already taking shape across institutions. Building on this foundation, this year's report introduces signals of change, or early indicators and emerging examples that surface nascent ideas and innovations at the edges of practice. Taken together, these perspectives provide both a clear view of the current landscape and a forward-looking lens on how teaching and learning may continue to evolve, helping institutions respond to current realities while also preparing for futures that are still unfolding.

Trends

To begin each Horizon Report process, we ask our panel of global experts to identify trends across the five STEEP domains. These are forces that are currently influencing teaching and learning in higher education at scale. They are observable across multiple institutions and contexts and have been demonstrated by sustained activity over time. The nominated trends are then voted on by the panel, and the following trends were identified as the most likely to impact the future of teaching and learning in the next 10 years:

Social Trends

- Higher education faces continued pressure to prove its value.
- AI is reshaping trust in information.
- AI is reshaping relationships between students and instructors.

Technological Trends

- AI is redefining teaching and instructional design.
- Cybersecurity and privacy threats to student and faculty data are growing.
- AI is transforming academic support and student success.

Economic Trends

- Declines in funding are straining institutional budgets and operations.
- Declining enrollments are accelerating financial strain across higher education.
- Credential ROI is redefining higher education value.

Environmental Trends

- Awareness of AI's environmental cost is growing in higher education.
- Digital learning is becoming a sustainability strategy.
- Campuses are embedding climate literacy into learning and research.

Policy Trends

- Policy reforms are reshaping academic autonomy.
- New accessibility regulations are driving campus-wide digital accessibility compliance.
- Executive orders on immigration are creating uncertainty for international students and institutions.

This year, established examples of practice are aligned directly to the trends. These projects or initiatives provide strong evidence that these trends are already influencing higher education at scale or have immediate potential to scale. These examples of practice help us understand the trends concretely and provide a solid foundation for near-term planning and decision-making.

Signals of Change

This year, the Horizon Report introduces a new section: signals of change. Signals of change are not trends. Rather than describing widespread trends currently influencing practices in teaching and learning, these signals point to early, often surprising, indicators of how teaching and learning might evolve. Signals of change often emerge at the edges of practice, within small pilots, niche communities, or unconventional approaches. They often feel incomplete, or even misaligned with current norms. That tension is part of their value. The emergence of these signals may indicate where existing models are beginning to strain or where new possibilities are taking shape. If these signals of change gain traction, they could reshape core assumptions about teaching and learning and point toward meaningful shifts in practice. If they do not, they can still offer insight into the boundaries of current practice and the directions that innovative work is exploring.

To support this forward-looking lens, the signals of change section introduces another new component this year, which we call "emerging practices." The Horizon Report has historically highlighted examples of practice aligned to key technologies and practices, offering insight into what is working now and how institutions are responding. This year, with the addition of the signals of change, we are also including emerging practices to surface early-stage work and ideas. These examples may still be nascent, but their emergence signals where innovation is beginning to take shape.

The combination of the trends and the signals of change reflects a sector under real pressure but also open to meaningful transformation. The forces shaping teaching and learning are interconnected and unfolding in real time. As with previous editions, the Horizon Report does not predict a single future but instead surfaces patterns that can inform institutional strategy. The core challenge for higher education is grounding decisions in what's already taking shape while leaving room to navigate what is potentially ahead.

TRENDS: SCANNING THE HORIZON

Institutions of higher education, and the teaching and learning practices they adopt, are in many ways products of the larger environments of which they are a part. Colleges and universities are always made up of people living at a particular point in history, residing together in particular communities, and sharing a particular mixture of cultural ideas, norms, and resources. Mapping the future of these institutions and their practices demands that we pay attention to the larger shifts taking place across our global society that may impact higher education in profound ways.

To help us explore these larger forces, we asked panelists to consider the current landscape and identify the most influential trends shaping teaching and learning across five categories: social, technological, economic, environmental, and policy (STEEP). This section summarizes the trends the panelists identified and voted as most important in each of these categories.

In higher education we are navigating a period of recalibration. Across social expectations, technological capability, economic pressures, environmental realities, and policy shifts, institutions are being asked to demonstrate value, safeguard trust, steward resources, and sustain their missions in new, visible ways. The forces shaping teaching and learning are not isolated but are deeply interconnected. Rapid AI adoption has influenced public trust and altered how institutions teach and support learners. Enrollment and funding pressures have been reshaping academic offerings and credentialing pathways. Climate concerns collide with digital institutional strategy and infrastructure investment (or lack thereof). Policy reforms affect faculty autonomy, accessibility practices, and international involvement.

This *2026 EDUCAUSE Horizon Report | Teaching and Leaning Edition* reflects a landscape where institutions are required to balance integrity with innovation, sustainability with agility, and academic freedom with accountability. This balancing act raises questions related to several kinds of access—access to opportunity, to human relationships in increasingly automated systems, to secure digital environments, and to global participation in higher education. As institutional leaders respond to these myriad pressures, they are also reconsidering what it means to deliver high-quality, future-ready education.

Social

Higher education faces continued pressure to prove its value.

AI is reshaping trust in information.

AI is reshaping relationships between students and instructors.

Technological

AI is redefining teaching and instructional design.

Cybersecurity and privacy threats to student and faculty data are growing.

AI is transforming academic support and student success.

Economic

Declines in funding are straining institutional budgets and operations.

Declining enrollments are accelerating financial strain across higher education.

Credential ROI is redefining higher education value.

Environmental

Awareness of AI's environmental cost is growing in higher education.

Digital learning is becoming a sustainability strategy.

Campuses are embedding climate literacy into learning and research.

In the sections below, summaries of these trends are drawn directly from the expert panelists' contributions, in keeping with the tradition of the Delphi methodology. Each of the trends was identified and voted on by panelists without influence from the EDUCAUSE Horizon Report staff, aside from our work in organizing, facilitating, and synthesizing the input for presentation here. The identified trends highlight the structural shifts happening in the higher education teaching and learning environment today.

Policy

Policy reforms are reshaping academic autonomy.

New accessibility regulations are driving campuswide digital-accessibility compliance.

Executive orders on immigration are creating uncertainty for international students and institutions.

SOCIAL TRENDS

Higher education takes place within particular social contexts, and learning is shaped and colored by the people interacting and building relationships throughout the academic journey. The student experience in higher education is a fundamentally social practice, one that is better understood by mapping the important social trends developing within and around it.

Higher education faces continued pressure to prove its value.

Public perceptions toward higher education continue to decline, particularly around affordability and preparation for the workforce, with concerns intensifying as Gen Z graduates struggle to find employment. At the same time, employer sentiment remains largely positive, with many organizations continuing to view higher education favorably and to value degrees in hiring. Even so, the issue is not as simple as whether college degrees lead to well-paying jobs. Instead, multiple factors are fueling the debate, including increases in inflation, tuition, and student loan debt; a fluctuating job market; and shifting workforce demands, particularly as AI reshapes roles and expectations. An evolving political environment that increasingly emphasizes accountability and proof of ROI further complicates the picture. Together, these pressures are forcing institutional leaders to rethink how educational value is defined and measured, putting greater emphasis on alignment with the labor market and outcomes such as degree completion, job placement, and financial success. In some states, this dynamic is also reinforcing a shift toward performance-based funding models that tie at least part of public support to specific outcomes, increasing the stakes of how results are measured and reported. Shifts are accelerating toward new delivery models and learning pathways, including stackable and microcredentials, experiential and skills-based learning, competency-focused assessments, and alternatives outside traditional higher education, such as trade schools. While these shifts create opportunities to better articulate value and align with economic priorities, they also raise concerns that public funding will become increasingly tied to economic outcomes, narrowing academic offerings and limiting the breadth of learning, research, and innovation. Looking ahead, institutions will need to balance these pressures by clearly communicating value while protecting educational breadth and ensuring workforce alignment does not come at the expense of long-term academic and societal goals.

AI is reshaping trust in information.

AI is changing how people decide what to trust by weakening traditional signs of credibility such as knowing who wrote something, where the information came from, and whether it was built through visible steps, including drafting, citing, and checking sources over time. AI now produces confident-sounding, well-structured, and often visually compelling outputs without always clearly disclosing authorship, sources, or reasoning, making it more difficult for readers to judge reliability at a glance. In higher education, this is exposing gaps in information literacy and adding stress because students and faculty now must question more of what they read and use. As increasing numbers of students turn to AI, concerns are also growing that some will skip the hard work of making sense of information for themselves, which can limit critical thinking and inhibit the development of new ideas. In response, some faculty are increasing oversight and monitoring, others are returning to more traditional assessments, and still others are redesigning courses to emphasize process, reflection, and authentic demonstrations of learning. Colleges and universities will increasingly need to help students focus on the skills underneath any tool: evaluating claims, checking evidence, explaining reasoning, and verifying information. This requires clearer guidance on responsible AI use, as well as a shift in assessment models that value depth of understanding and thinking processes over polished output.

AI is reshaping relationships between students and instructors.

The student–instructor relationship is being reshaped as students increasingly rely on AI for explanations, drafting, and assignment support, sometimes feeling more comfortable seeking help from AI than from instructors. As AI becomes a primary form of academic support, informal interactions and office-hour visits could decline, reducing opportunities for mentoring and relationship-building, and exacerbating mismatched expectations as students and instructors use AI in different ways. This misalignment—along with unclear rules, limited transparency on both sides, and growing use of AI-detection tools—is straining student–instructor relationships, creating mutual distrust and suspicion. In this environment, instructors might feel they have to watch more closely to protect fairness and academic standards. At the same time, students might feel they are assumed to be cheating, especially when a detection result is treated as evidence, which can push them to focus on proving they did the work instead of taking learning risks. Compounding these challenges, research suggests that when sources and reasoning are not clear, both people and AI detectors often fail to reliably spot AI-written or misleading content, a problem that will intensify as AI becomes more sophisticated. At the same time, institutions are experimenting with chatbots and AI tutors to provide routine support, raising questions about privacy, governance, cost, and whether automation turns instructors into course managers instead of mentors. Looking ahead, institutions will need clear, consistent norms for ethical AI use, along with a clear plan to invest in the human parts of higher education that AI cannot replace, including mentoring, judgment, and learning designs that keep trust, belonging, and student growth at the center.

In Practice

Student-Led AI Symposium

What happens when you flip the room such that students facilitate and faculty listen? The University of Utah's Student-Led AI Symposium was designed to find out. Grounded in a relational AI literacy framework, the event asked students to set the agenda, lead every session, and share how they're actually using AI. More than 130 people attended, and the result was reperception: attendees began seeing AI knowledge—and each other—differently. A weekly AI Tinker Lab followed.

Social Presence Literacy Lab: A Human-Centered Framework for Teaching in the Digital Age

The Social Presence Literacy Lab, supported by the Center for Innovation in Research on Teaching at Grand Canyon University, aids faculty in designing human-centered online learning that counters student isolation in technology-mediated education and AI-enhanced education. The lab treats social presence as a teachable literacy, providing scalable tools, training, and classroom-ready resources that foster belonging, engagement, and relational trust. Outcomes include improved instructional design practices and a replicable institutional model for embedding connection into digitally rich teaching environments.

Society & AI

As AI enters classrooms faster than shared norms or guidance, educators face fragmented, tool-driven responses to profound pedagogical and governance questions. Society & AI intervenes by treating scholarly publishing as infrastructure for teaching and learning. Through open, fee-free, scholar-led curation, the initiative supports educators across sectors in developing shared language, professional judgment, and equity-centered approaches to AI-mediated teaching, learning, and institutional decision-making.

Accelerating Faculty AI Adoption through a Situated Social Mentorship Framework

This faculty development initiative addresses uneven AI readiness and anxiety by positioning AI integration as a social, community-based learning process. Through structured self-assessment, peer mentorship, and instructional design support, faculty develop confidence, shared language, and pedagogically grounded AI practices. The program fosters belonging, professional identity growth, and sustainable instructional innovation, moving participants from isolated experimentation to collaborative, human-centered AI-enhanced teaching.

Don't AI Alone

Faculty, staff, and students across CUNY's 26 campuses were grappling with AI in silos, with limited visibility into innovative work happening elsewhere in the system. Don't AI Alone (DAIA) is a grassroots community of practice that maps, connects, and showcases this work. Through two convenings, a living database of 120+ projects, and a public showcase, DAIA has surfaced remarkable AI innovation across the largest urban university system in the country.

The 4D Peer Mentor Program: Building a Constellation of Mentors

The Peer Mentor Program at the University of Denver (DU) supports new students as they navigate their transition by pairing every incoming student with a trained peer mentor. Through coursework, relationship-building, and values-driven mentorship practices, peer mentors help new students cultivate belonging, understand DU's signature 4D experience, and connect early to the campus community. This student-centered model strengthens confidence, resource awareness, and academic and personal success during the first year.

Digital Ethics Principles in ePortfolios

The Digital Ethics in ePortfolio Task Force comprises a diverse global coalition of practitioners, researchers, and platform providers united by a commitment to ethical and effective ePortfolio practices. Our community of practice advocates for the application of digital ethics principles, provides practical resources that are guided by research and good practice, and facilitates collaboration. We inspire educators to engage with ePortfolios intentionally as a high-impact practice for reflective and transformative student development. Our largest project, the Digital Ethics Principles in ePortfolios, is designed to support a variety of stakeholders, including students, faculty, staff, and platform developers in implementing ePortfolios with digital ethics at the center of their design.

Instructional Design Fellows

The Instructional Design (ID) Fellows program expands instructional design capacity through a scalable, faculty-driven peer-mentoring model. The program trains faculty to become ID mentors in partnership with the Office of Online Learning. Fellows adapt to college needs by currently using a research-based checklist to conduct collaborative online course reviews focused on best practices, Regular and Substantive Interaction (RSI), and accessibility. The model is low-cost and replicable, supported by tuition-differential revenue.

EXPLORE MORE

Gallup
"Perceived Importance of College Hits New Low"
Explores how Americans' views on the value and importance of a college education have been shifting over time.

KPMG / University of Melbourne
"Trust, Attitudes and Use of Artificial Intelligence: A Global Study 2025"
Examines public trust in AI, how people are using it, and what they expect from AI governance and regulation across countries.

The Conversation
"University Students Feel 'Anxious, Confused and Distrustful' about AI in the Classroom and Among Their Peers"
Takes a look at how college students are experiencing generative AI in coursework and how it's influencing classroom norms and peer and instructor relationships.

TECHNOLOGICAL TRENDS

Technology is constantly changing and growing more sophisticated. As technologies become outdated and new technologies are introduced, institutions of higher education must consistently monitor the usefulness of technology that has already been implemented and plan for new technologies that enable more adaptive decision-making and more flexible teaching and learning experiences. What those technologies are, how they are deployed across the institution, and the ways in which they themselves continue to evolve is one of the ongoing and defining stories of higher education.

AI is redefining teaching and instructional design.

As student AI use becomes routine, traditional assessments are being questioned for their ability to reliably measure learning, especially due to concerns over cheating. In response, instructors are facing pressure to redesign assessments to focus on more authentic demonstrations of learning that emphasize process, reasoning, collaboration, oral explanation, and critical evaluation of AI outputs, with some faculty even reverting to traditional methods such as Scantron forms, blue books, and in-person proctoring. At the same time, faculty and instructional designers (IDs) are using AI to streamline course development, ensure materials are accessible, and improve alignment across sections and programs by mapping learning goals to accreditation standards and competency frameworks. As AI becomes a more integral part of the LMS, instructors may also lean into using course data to see where students are struggling and make quick adjustments during the term, creating opportunities for personalized and flexible course options with tailored support. This efficiency must be balanced against the potential risk that AI-generated course material will feel generic. Expert faculty review is critical to ensure important details, examples, or perspectives are included. Concerns also arise that if decision-makers treat AI as a way to do more with fewer people, that approach could increase teaching loads, reduce support roles, and lower the quality of the feedback and mentoring that students receive. Overall, this shift is pushing more campuses to build AI skills into the curriculum, and that means supporting faculty and IDs too. Students need more than tool use; they need to understand how AI works, where it can be wrong, and what responsible use looks like. Faculty and IDs will need shared guidance, training, and time to redesign assessments and course materials so that AI streamlines work without lowering the quality of learning.

Cybersecurity and privacy threats to student and faculty data are growing.

Student and faculty data are increasingly at risk as universities and colleges face more security incidents, with phishing the most commonly reported entry point, leading to attacks such as ransomware, malicious scripts, exploited vulnerabilities, and compromised credentials. These attacks can expose sensitive student and faculty records, including personal identifiers, financial information, and academic or employment data. Overall, threats are growing as campuses expand their digital footprints—relying more on external vendors and cloud services; adding tools, accounts, and online services; and supporting remote work on networks that are not always secure. AI is also exacerbating risks, especially when people enter sensitive or protected data into unvetted tools or when AI systems are given access to campus systems and accounts. At the same time, AI is lowering the barrier to entry for attackers by making it easier to create convincing phishing messages, automate scams, and generate malicious content at scale. The impacts from these threats can be immediate and far-reaching. They can disrupt learning systems and basic campus operations, force expensive upgrades and training, and expose students and employees to identity theft. When breaches become public, they can also damage trust in the institution. In this environment, institutions face growing tension between protecting data and ensuring that students and faculty can easily access course tools, accounts, and support. As institutions strengthen security controls and oversight to protect data, they might rely on measures such as stricter ID checks, increased monitoring, and locked-down testing tools. While intended to reduce risk, these approaches can feel invasive and may restrict access or create new hurdles for some. Looking ahead, ongoing investment and better coordination across IT, legal, procurement, accessibility, and teaching and learning teams will be necessary so that campuses can protect data without disrupting instruction, undermining trust, or creating new barriers for students.

AI is transforming academic support and student success.

Student support is shifting as AI makes support easier to access and more proactive, instead of relying on students to ask for help only after problems grow. An increasing number of institutions are licensing or building chatbots, and over time, these tools may connect with advising systems, CRMs, and learning platforms to act more like personal assistants that help with scheduling, course planning, studying, and referrals. This could reduce repetitive outreach, support earlier intervention, and free up staff to focus on more complex student needs, but the quality of support depends on accurate information and clear guardrails. As AI tutoring agents become more advanced, institutions (and students) might come to rely on them for support, making it more difficult to determine how much of student work reflects their understanding versus AI's guidance. At the same time, a proliferation of AI support could also create uneven experiences if some students mostly interact with automated help while others receive human support, especially since student relationships and interactions play a significant role in shaping their experiences and growth. Looking ahead, institutions will need integrated support systems with strong governance, clear handoffs from AI to people when students face complex or high-stakes needs, and student-facing guidance that explains what the tools can and cannot do, how data are used, and where to go for human help. Without these structures in place, AI will expand access and speed up support but might also weaken trust, a sense of belonging, and the quality of support students receive.

In Practice

The AI Guidebook for Higher Education Faculty

"The Learn-It-All Educator: A Guidebook for Training Brains, Not Replacing Them" is a practical resource written to help higher education faculty move beyond the "adopt versus ban" AI debate and toward intentional cognitive development. Using frameworks including Cognitive Triage, The Intelligent Gearbox, The Cognitive Gym, and The Intelligent Simpleton, educators design learning experiences in which AI builds rather than bypasses critical thinking. The guidebook provides ready-to-use worksheets grounded in evidence-based practice, positioning generative AI as a tool that strengthens, rather than shortcuts, human learning.

Scaling Immersive Learning Across Disciplines: Bentley University's XR Ecosystem

Bentley University developed a campus-wide VR/XR ecosystem to expand access to experiential learning across disciplines, addressing limitations of traditional field, global, and skills-based instruction. Supported by a centralized XR Studio, faculty integrate immersive experiences into credit-bearing courses, including marine and coastal ecosystem field learning, global business simulations, language and professional communication practice, cyberpsychology instruction, and workforce skill development. The initiative enables scalable, repeatable, and accessible experiential learning aligned with evolving educational and professional needs.

Charlie, Purdue's Rubric-Based AI Writing Assistant

Charlie is an AI-powered feedback feature of Circuit, Purdue's peer-review platform. Instructors switch it on per assignment; students submit drafts and receive rubric-aligned guidance within minutes, fueling purposeful iteration at scale. By situating AI inside authentic writing workflows and asking students to evaluate and contextualize suggestions, Charlie expands equitable access to high-quality formative feedback, strengthens revision habits and AI literacy, and models a governed, workflow-integrated future for learning.

boisestate.ai Showcases the Benefits of AI Sovereignty

boisestate.ai is Boise State University's open-source generative AI platform designed to provide equitable, cost-effective AI access to all 27,000 students and faculty. Running entirely within the university's AWS environment, it protects student and faculty data, eliminates vendor lock-in, and provides access to powerful AI tools at a fraction of the cost compared to commercial subscriptions. Deep integration with campus systems including Canvas, Google Workspace, and PeopleSoft transforms it from a chat tool into institutional infrastructure.

Edvance: Predicting and Guiding Student Success via AI-Powered Early Interventions

This project targets higher education educators and students, addressing the challenge of scaling personalized feedback and supporting students in effectively using it. Grounded in generative AI and prescriptive learning analytics, this project integrates actionable personalized feedback, engagement visualization, a customized chatbot, and learning goal setting and management into a unified learning support tool named Edvance. The tool has been piloted in authentic courses and is undergoing iterative refinement and further development.

AI & Accessibility Snackables: A Micro-Learning Ecosystem for AI-Supported Course Design

The AI & Accessibility Snackables ecosystem is a modular micro-learning framework that helps faculty integrate accessibility and generative AI into course design through short, problem-focused learning modules. Each Snackable supports one actionable instructional improvement using guided AI prompts and structured experimentation. Reinforced through AI & Accessibility Lab sessions, the model lowers barriers to adoption, improves accessibility practices, and supports scalable, faculty-driven innovation in inclusive and technology-enhanced teaching.

From Overwhelmed to Empowered: Scaling AI-Enabled Advising to Reclaim Time, Strengthen Relationships, and Transform the Student Experience

Lone Star College launched Ellis C., an AI-powered advising chatbot embedded in the student portal, to reduce advisor time spent on routine informational inquiries and strengthen student relationships. Developed in a 90-day cross-campus sprint, Ellis provides 24/7 answers to admissions and advising questions. With 70,000+ conversations and 96% accuracy, the chatbot has saved thousands of advisor hours while improving access, consistency, and the student experience at scale.

Scaling and Elevating Experiential Learning Through AI-Generated Micro-Stories and Interactive Technologies

Belmont University uses storytelling as an instructional strategy, creating narrative-driven micro-stories that help students connect with and relate to course content in meaningful, human-centered contexts. Generative AI enables rapid development of these stories, including characters, dialogue, voice, and visuals, while interactive technologies bring them to life and allow students to participate in the narrative. This approach makes story-driven, experiential learning scalable, transforming abstract concepts into interactive, relatable learning experiences.

A Safe Place to Practice Hard Conversations: Insights from a Mental Health Crisis Simulation for Pre-Clinic Students

Designed for pre-clinical Doctor of Chiropractic students, this initiative addresses limited opportunities to practice mental health crisis conversations before clinical placements. Its purpose is to build communication confidence and crisis-response skills in a psychologically safe environment. Using Bodyswaps VR simulations paired with structured debriefing, students rehearse therapeutic communication and de-escalation. Outcomes include increased self-reported confidence, stronger reflective insight, and improved preparedness for emotionally complex patient encounters.

EXPLORE MORE

UNESCO

"What's Worth Measuring? The Future of Assessment in the AI Age"

Explores how generative AI is reshaping what schools should assess and how assessment can shift toward skills such as reasoning, creativity, and ethical judgment.

Verizon Business

"2025 Data Breach Investigations Report"

Analyzes thousands of real-world security incidents and confirmed data breaches to identify the most common attack patterns, entry points, and tactics organizations can use to strengthen defenses.

Complete College America

"Generating College Completion: Charting a Path to Institutional AI Adoption For Student Success in Higher Education"

Outlines a roadmap for how institutions can adopt AI in ways that support student success, including the organizational capabilities and governance needed to do it responsibly.

ECONOMIC TRENDS

Higher education is no stranger to economic challenges. Finding reliable markets and sources of revenue while keeping costs from ballooning is always of critical importance to institutions. Yet economies and enrollment patterns fluctuate, so institutional leaders need to be prepared for fiscal instability and uncertainty by anticipating declines in funding and adopting new ways of thinking about and planning institutional business.

Declines in funding are straining institutional budgets and operations.

Higher education institutions are facing budget strain that is increasingly hard to fix through routine cuts and reallocation, especially as federal research funding becomes more volatile and as state funding, though increasing in some states, often is not keeping pace with inflation. As funding becomes less certain, campuses are leaning harder on tuition and fees while pursuing new revenue streams such as industry partnerships, externally sponsored research, alternative learning pathways and expanded online programs, rent from underused space or land, and commercialized research. These shifts in revenue sources are accelerating concerns that universities and colleges will act more like businesses and that financial pressures will start driving academic decisions. At the same time, uncertainty in research and grant funding is disrupting research institutions, impacting graduate and postdoctoral funding, faculty recruitment and retention, and efforts toward innovation. Already, institutions are experiencing workforce impacts including hiring freezes, layoffs, unfilled vacancies, and reduced professional development, alongside deferred maintenance and delayed technology upgrades. Together these complications carry the risk of eroding teaching and learning over time. Looking ahead, institutions will need multiyear budget scenarios and a clear process for deciding what to protect, what to scale back, and what to stop so that revenue efforts and budget cuts don't undermine teaching, research, or the student experience.

Declining enrollments are accelerating financial strain across higher education.

With fewer traditional-age students and fewer international enrollments, many institutions face a simple math problem: less tuition coming in, even as costs are staying the same or rising. As a result, competition for students is increasing and institutions are changing their recruitment strategies. For example, some institutions are placing more emphasis on outreach, including personalized AI-powered outreach and outreach targeting specific populations, such as those with "some college, no degree." Others are hiring chief marketing officers, boosting tuition discounts, and expanding dual enrollment programs and workforce-aligned programs. These shifts can help institutions stabilize enrollment, but they also tend to raise recruiting costs, making budgets more volatile. They can also reshape priorities by pushing growth in workforce-aligned and targeted programs, while also raising new concerns about equity and privacy, in addition to making higher education feel more market-driven. With further declines in enrollment, more campuses will likely consolidate or close low-enrolled programs, with smaller, tuition-dependent institutions hit first. Institutions may also resort to offering fewer course sections and reorganizing or reducing staffing, potentially increasing workload and worsening burnout and stress for those who remain. Yet the largest risk is that institutions get stuck in an ongoing cycle in which fewer students leads to fewer resources and services, weakening the student experience and ultimately leading to even fewer enrollments. Looking ahead, institutions will need to stabilize revenue by focusing as much on retention as recruitment while redesigning programs and delivery models to better fit a smaller and more varied student pipeline.

Credential ROI is redefining higher education value.

Higher education institutions are under growing pressure to prove credential ROI which looks at the payoff of a specific program (such as a nursing certificate or a cybersecurity degree) rather than relying on the average value of the institution as a whole. In response, institutions are expanding shorter, more flexible credentials such as certificates, badges, bootcamps, and microcredentials that can build toward larger credentials over time. For students, these options can lower the upfront risk, deliver skills faster, and clearly signal to employers what someone can do. These options can also provide a more practical way for adults with some college but no degree to resume their studies. This is also pushing teaching toward more applied and evidence-based learning such as projects, portfolios, and demonstrations of skill that are easier to explain to employers. The risk is that if ROI is defined too narrowly then schools may put more resources into programs with the clearest wage outcomes and less support into fields that build important skills but do not show up clearly in salary data. Looking ahead, institutions will need to include career payoff in how they talk about value without letting salary become the whole story. They will also need to be clearer about what students will learn and be able to do, use stronger assessments so credentials actually signal real skills, and help students understand what ROI data do and do not mean.

In Practice

Globalized Entrepreneurship Study Abroad

At North Carolina A&T State University, this course serves primarily first-generation and first-time traveler students facing shrinking scholarship access. Students launch revenue-generating coffee or fragrance brands within one semester to fund study travel, then apply profits toward tuition and fees. Addressing affordability and economic mobility issues, the program blends experiential entrepreneurship with global exposure. To date, nine students have sustained their businesses beyond the class and have used the revenue to pay down future semesters.

VE/COIL Clinics: A Cross-Functional Digital Infrastructure for Global and Workforce-Integrated Learning

The VE/COIL Clinics are a modular, digitally enabled ecosystem supporting cross-functional institutional teams in designing globally connected, workforce-integrated learning. Developed in response to budget pressure and policy volatility, the clinics replace travel-dependent internationalization with scalable digital collaboration. Through structured online modules, live strategy dialogues, and credentialed outcomes, institutions embed global skill development into curricula in financially sustainable and strategically aligned ways.

The Comprehensive Learner Record at the University of Georgia

The comprehensive learner record (CLR) is an innovative digital credential designed to help students showcase their experiences both within and outside the classroom. Employers are increasingly prioritizing candidates with professional skills. Students are already learning these skills through their coursework and campus involvement, and the CLR will help them tell their story. This CLR highlights six competencies, including the foundational skills employers are seeking most: critical thinking, analytical thinking, communication, social awareness and responsibility, creativity and innovation, and leadership and collaboration.

The Semantic Pivot: Using AI to Bridge the Cybersecurity Diversity Gap Through Competency-Based Signaling

UC Berkeley produced measurable shifts in the cybersecurity talent pipeline by transforming jargon-heavy job descriptions into Job Genomes. Students generate Skills Genomes and are subsequenty matched to potential jobs based on alignment between the genomes. Operationalized at two- and four-year colleges, this approach removes semantic barriers for underrepresented talent, increases candidate self-efficacy, and provides institutions with data-driven, equitable pathways into high-demand cybersecurity careers. This initiative effectively turms a confusing recruitment process into a transparent roadmap for career readiness.

Go Beyond: Penn State Engineering Microcredentials for Workforce-Ready Learning

Penn State College of Engineering's Go Beyond initiative delivers short, assessed microcredentials for external professionals and current students in technical and professional areas, including modern manufacturing. External audiences register at cost, while student participation is offered at no charge through industry sponsorships. Built by combining business-model thinking with learner-centered design, Go Beyond creates flexible, workforce-relevant pathways that help the college respond quickly to industry demand and deepen employer partnerships.

IEEE's Skills-Based Microcredentials: Forging New Pathways into STEM Careers

To address the global shortage of skilled technical workers, IEEE has developed skills-based microcredentials that serve as a bridge between academic providers and industry partners seeking skilled talent. IEEE's skills-based microcredentials are a formal recognition of a person's learning that validates the acquisition of specific knowledge areas, skills, abilities, or, when "stacked," broader competencies. The competency-based model disregards seat time or course completion and instead focuses on skills development and validation, making learning visible with digital badges (Open Badges 3.0) that contain the skills metadata employers are looking for.

EXPLORE MORE

American Council on Education
"House Passes FY 2026 Spending Package Preserving Education and Research Funding as Senate Showdown Looms"
Covers the latest FY2026 federal appropriations debate for the Labor–HHS–Education package, including funding priorities and policy signals relevant for higher education.

National Student Clearinghouse Research Center
"Final Fall Enrollment Trends"
Provides a national overview of postsecondary enrollment trends in 2025 (by sector and student characteristics).

Inside Higher Ed
"Better Defining and Measuring Higher Ed's Value"
Examines how colleges might better define and measure higher education's value for accountability beyond simple outcome metrics like earnings alone.

ENVIRONMENTAL TRENDS

Institutions of higher education draw on finite local and global materials and resources to fuel their operations, and their facilities leave sizable imprints on the environments around them. The need to adopt sustainable practices across the board—far too often overlooked in higher education planning and decision-making—will be inescapable in a future more concerned with climate stability and environmental sustainability.

Awareness of AI's environmental cost is growing in higher education.

As AI use expands across higher education, increasing numbers of faculty, students, and governance groups are paying attention to its environmental footprint. Quantifying AI's exact footprint is challenging, and estimates can vary depending on a number of factors. Nevertheless, it is clear that as AI advances, we will only see its impact on the environment grow. Greater reliance on AI means infrastructure has to grow too, allowing for more computing power. This will lead to increases in electricity use and the need for cooling in data centers. Ultimately, this would raise operating costs for higher education institutions and, in some regions, add pressure to local power grids and water supplies used for cooling. In response, AI policies and procurement are likely to broaden beyond privacy and integrity to include sustainability expectations, such as clearer vendor reporting and more intentional decisions about when AI meaningfully adds value. Students, faculty, and staff need clearer guidance on the environmental costs associated with the use of AI, and AI literacy efforts should encourage intentional use rather than defaulting to AI for every task. Institutions can build this thinking into teaching, training, and everyday workflows so people understand that different AI activities carry different resource demands, use AI more intentionally, and measure and offset the associated carbon footprint. This approach might also create more variability in classrooms and work practices, given that some students would likely resist using AI for sustainability reasons, and it could push faculty and committees to be clearer about when AI use is required versus optional. Looking ahead, institutions will need to limit unnecessary AI use and push vendors toward more efficient, transparent "green AI," while still using AI where it clearly supports learning and sustainability goals.

Digital learning is becoming a sustainability strategy.

Digital learning is increasingly being treated as a sustainability strategy because shifting some instruction to online or hybrid can reduce major sources of emissions, especially commuting and the energy demands of running physical space at full capacity. Putting more materials online can mean less printing and shipping of physical course materials such as coursepacks, textbooks, and workbooks. Digital content is also easier to update than printed material. Although digital learning can reduce emissions, how much it actually helps the environment also depends on the devices people use and the energy needed to run the internet, servers, and platforms behind the scenes. At the same time, many institutions are treating online and hybrid learning as part of climate resilience because it can keep classes running during campus closures due to extreme weather or other events, assuming students have access to power and internet. But it can also widen gaps when students have unreliable internet, limited access to appropriate devices, or less access to tutoring and other support; in those ways, sustainability benefits can come at an equity cost if digital options aren't designed and supported well. Looking ahead, institutions will need to treat modality as a planning tool, not just a teaching preference, by choosing modalities that support climate goals without sacrificing quality. That will require faculty to be equipped and supported to teach well in hybrid and online formats and will push facilities, sustainability, IT, and academic units to plan together around space use, commuting, and the energy demands of digital infrastructure.

Campuses are embedding climate literacy into learning and research.

Campuses are starting to treat climate literacy as something every graduate, not just environmental majors, should have, leading colleges and universities to add climate and sustainability topics to general education and to courses across many fields. As a result, institutions are having to make decisions about definition and scope, such as what "climate" versus "sustainability" means, where and how these fit into already crowded requirements, and how to assess climate-related learning in a meaningful way. This shift is affecting practical needs including hiring and retraining faculty, supporting curriculum redesign, and navigating pushback when climate education is seen as politically charged or imposed from above. As institutions embed climate literacy into learning and research, they increasingly rely on hands-on approaches, such as using the campus as a learning site where students work with real systems and data (energy, water, waste, and transportation), using experiential tools including simulations and serious games, and offering experiences aimed at building skills that translate into professional contexts. Additionally, because climate topics remain particularly vulnerable to misinformation, institutions increasingly focus on tying climate literacy to other critical literacies such as data, media, and information literacy. Looking ahead, campuses will need clear goals for what students should learn, practical support for faculty, and real examples and assignments that connect climate concepts to local data, research, and campus operations. Without that support, climate literacy risks becoming uneven across departments or reduced to a one-time requirement instead of a skill students build over time.

EXPLORE MORE

MIT Technology Review
"We Did the Math on AI's Energy Footprint. Here's the Story You Haven't Heard."
Explores the climate implications of generative AI by unpacking how AI training and everyday use translate into energy, water, and emissions demands across the tech stack.

European Climate Pact
"Going Digital – Good or Bad for the Climate?"
Examines the climate tradeoffs of digitalization where tools like AI, cloud services, and remote work can reduce emissions, but growing digital infrastructure and device turnover can add to them.

Learn With AI | University of Maine
"What Uses More?"
An interactive tool for comparing the estimated energy and water use of AI tasks versus everyday digital activities, designed to help contextualize digital environmental footprints.

POLICY TRENDS

Higher education, for better and for worse, is always entangled in and influenced by the policy landscape of the present moment. In addition to shaping funding structures and regulatory frameworks, policy is deeply embedded in higher education through institutional practices and compliance requirements and as a subject of scholarly inquiry and instruction. Because of this inherent entanglement, shifts in policy have meaningful and wide-ranging impacts—both positive and negative—on higher education at a variety of levels.

Policy reforms are reshaping academic autonomy.

At federal and state levels, a mix of laws and broader political efforts is increasingly influencing campus decisions that formerly were left mainly to faculty and institutions. This creates pressure for some faculty to avoid or soften certain topics and language in syllabi, teaching, and research. As restrictions expand and investigations increase, colleges and universities might increasingly treat academic decisions as compliance risks, given the potential for lawsuits, penalties, and the loss of funding. This shift could expand the role that legal and governance considerations play in decisions about course content, research topics, and programming. At the same time, a growing number of campuses—often at the behest of state legislators—are requiring syllabi to be posted or stored in central systems. Doing that can improve transparency, but it also raises concerns about who owns the syllabus, whether it can be requested under public-records laws, and whether course materials could later be reused or repackaged without the instructor's control or consent. Overall, these changes have the potential to significantly impact intellectual property rights and faculty morale, potentially leading to increased faculty turnover and difficulties in hiring. This shift in faculty autonomy can also alter course dynamics, changing the nature of inquiry and discussion in classrooms. Looking ahead, institutions will need clearer guidance and norms that protect academic judgment and freedom while meeting compliance requirements across an increasingly uneven policy landscape.

New accessibility regulations are driving campus-wide digital accessibility compliance.

New federal accessibility requirements are turning digital accessibility into a campus-wide compliance priority, with public universities and colleges expected to meet WCAG 2.1 Level AA for web content and mobile apps on a fixed timeline. Once the new regulations take effect, institutions will need to ensure the accessibility of all digital resources, not just those requested through accommodation requests. Course sites, PDFs and other documents, videos and audio, and many third-party tools will be expected to be accessible from the start. In the short term, remediating existing resources to be accessible is creating a lot of work, especially adding captions and audio descriptions and making complex, highly visual content usable with screen readers. One potential risk is that without easy-to-access hands-on support to make course materials accessible, some instructors will avoid or reduce video and other media-heavy materials simply because they can't make them accessible in time, narrowing learning options for students. Further, campuses may increasingly lean on AI to speed up some of these tasks, but human review will still be required. Procurement and IT will also play a bigger role as institutions demand accessible products and clearer documentation from third-party providers. Over time, higher education and society in general will benefit—students with disabilities will be able to access materials right away, and the quality of online materials will improve for everyone. But to get there, colleges will need training, shared processes, and enough staff and budget so the work does not fall entirely on individual faculty.

Executive orders on immigration are creating uncertainty for international students and institutions.

Executive orders and related policy moves in the United States are increasing uncertainty for international students and the campuses that enroll them. These include new travel bans, suspended visa processing, and tighter screening processes that can disrupt plans to enter, reenter, or continue study in the United States. Already, there has been a drop in international student enrollment, particularly for graduate students. That uncertainty is also playing out in a more visible immigration enforcement climate that is heightening safety concerns. Overall, these tensions may impact both enrollments and retention, discouraging new international enrollments and making it more difficult to retain current international students as they question their safety. For institutions, continued declines in international enrollment could have negative fiscal implications because tuition revenue would fall while many costs remain fixed. Moreover, gaps in the academic workforce could emerge, especially in graduate-heavy programs, which often depend on international students not only for enrollment but also for teaching and research assistant capacity that keeps labs, course sections, and faculty research moving. It could also reduce the mix of global perspectives on campuses, reducing opportunities for cross-cultural learning and making discussions, group work, and problem-solving feel more local and less globally informed. Institutions may respond by putting more effort into helping current international students stay enrolled and understand changing visa rules, as well as by offering more online options or joint programs with overseas partners so students can keep progressing when travel or securing visas is difficult. Meanwhile, the administration has proposed an agreement offering greater access to federal benefits to campuses that agree to specific requirements, including a 15% cap on international undergraduate enrollments. Colleges and universities thus far have generally rejected the proposed "Compact for Excellence in Higher Education," but the possibility that the administration could seek to impose an international student enrollment cap through other means adds more uncertainty for planning and recruitment.

In Practice

S.E.C.U.R.E. GenAI Use Framework

S.E.C.U.R.E. (Security credentials, Ethical use, Confidential information, Use of personal data, Rights protection, Evaluation of outputs) is a Creative Commons–licensed governance framework for higher education staff using generative AI. Developed to address inconsistent and risky GenAI adoption, it provides a practical, six-domain risk-screening tool aligned to policy and legislation. It enables low-risk use without approvals while strengthening privacy, integrity, and accountability across teaching, research, and professional contexts.

Assessment Integrity in the AI Era: A Verification-First Approach

Grand Canyon University redesigned academic integrity governance in response to generative AI by eliminating reliance on AI detection and adopting a verification-centered assessment framework. Instead of proving AI misuse, faculty verify student mastery through professional judgment and structured learning checks. This policy shift reduces investigative burden, restores instructional authority, lowers institutional friction, and refocuses integrity efforts on protecting learning outcomes in AI-integrated classrooms.

From Remediation to Momentum: Rethinking Math Placement and Pathways

SUNY Orange replaced standardized math placement tests with guided self-placement, combining student self-reports, confidence surveys, and a growth mindset. Alongside a redesigned developmental curriculum and co-requisite supports, the reform improved accuracy, persistence, and equity. Results show higher gateway course enrollments, stable success rates, and reduced equity gaps.

The GAiIT Framework: Providing AI Guidance for Curriculum Development, Instruction, Assessment, and Engagement

The Generative AI Inclusion Threshold (GAiIT) provides icon-driven AI assignment guidance impacting curriculum design, instruction, assessment, and engagement in online higher education. Colleges and universities need clear, scalable policies to address faculty concerns about how extensively students use AI. Faculty and leadership collaborators at National University developed GAiIT to define five levels of potential AI usage in assignment submissions. Curriculum is developed with the specified GAiIT level embedded in each course assignment.

Making Course Content Accessible with AI: Title II Readiness

This self-enroll LMS resource helps faculty improve the accessibility of digital course materials in response to Title II digital accessibility requirements. It combines structured accessibility guidance, custom AI prompts, decision matrices, and AI-supported workflows that help instructors determine when to fix or rebuild materials while improving accessibility features such as headings, alt text, color contrast, and tables. By integrating generative AI into policy-driven accessibility practices, the model supports scalable, faculty-driven improvements in accessible course design.

EXPLORE MORE

AAUP

Academic Freedom Field Guide

A practical resource hub for understanding and responding to threats to academic freedom and policy interference in higher education.

ADA

"State and Local Governments: First Steps Toward Complying with the Americans with Disabilities Act Title II Web and Mobile Application Accessibility Rule"

A practical starting guide to what ADA Title II web and mobile accessibility compliance involves and how public institutions can begin organizing for it (roles, planning, and WCAG 2.1 AA readiness).

Council on Foreign Relations

"A Guide to the Countries on Trump's Travel Ban List"

Provides an overview of the travel-ban policy landscape, including which countries are affected and how the list and restrictions have evolved over time.

SIGNALS OF CHANGE

This year, the teaching and learning edition of the EDUCAUSE Horizon Report debuts a new section: signals of change. The Horizon Report has long identified trends along with key technologies and practices that illustrate those trends within teaching and learning. The signals of change reflect a growing need to look earlier in the cycle to identify emergent innovations, behaviors, or events that may seem fringe now but hold the potential to shift teaching and learning and hint at what may become future trends.

This section is intentionally exploratory. It surfaces developments that are often highly localized or still forming, and it provides an opportunity to consider what those developments might mean for the direction of teaching and learning. In some cases, these signals highlight early adoption of new technologies or practices; in others, they reveal changing expectations, emerging pressures, or subtle shifts in how some are approaching teaching and learning. By examining these early indicators, readers can begin to ask, "What might this mean for my institution? If this gains traction, how should we respond?"

In this section you will find the signals of change identified by the *2026 Horizon Report | Teaching and Learning Edition* expert panel. These signals are loosely grouped to highlight areas where early indicators appear to be clustering and include evolving use cases for AI technologies; questions of governance, trust, and transparency; shifts in the structure and expectations of education systems; efforts to improve the return on investment of higher education; and broader external pressures shaping the educational landscape. These groupings are not intended to be rigid categories but rather a way to help readers navigate and interpret patterns across this set of signals.

This year's report also includes examples of emerging practices—early-stage initiatives that exemplify the ideas and potential of technology developments that could blossom into Horizon trends in the coming years. These emerging practices are themselves signals of change, examples of innovation at the edge in the higher education context, and are presented later in this section to spark thinking and investigation into the ways that higher education might be influenced by technological innovation.

Evolving Use Cases for AI Technologies

AI Governance and Trust

The Changing Landscape of Education Systems

Attempts to Improve the ROI of Higher Education

External Pressures on Education Stakeholders

Emerging Practices

EVOLVING USE CASES FOR AI TECHNOLOGIES

AS INDIVIDUAL AND INSTITUTIONAL FLUENCY WITH AI INCREASES, INNOVATIVE APPLICATIONS HINT AT THE POSSIBILITIES THAT THE TECHNOLOGY CAN HAVE IN EDUCATIONAL CONTEXTS.

Autonomous Businesses

The General Intelligence Company, a New York–based startup, aims to help businesses run completely autonomously with the help of AI agents.

This autonomous-business startup heralds the emergence of an entirely new business model, one in which virtually all of the functions are handled by AI—an idea that has come to be called the "one-person, billion-dollar company." If fully automated (or nearly fully automated) businesses rise in popularity, educators will need to reconsider whether and how colleges and universities are effectively equipping students with the competencies needed to work and succeed in an environment of such businesses. In the view of some business educators, this may demand a heightened curricular focus on technical skills and preparing students to be the designers and creators of these emerging AI capabilities. Business leaders skilled in programming and engineering, machine learning and data science, and systems thinking and design may be best positioned to thrive in these new ways of working. For others, the business leaders' depth of reasoning and sharpness of instinct in how to best engage with these tools will set those people apart. Here the traditional markers of a liberal arts education—critical thinking, analysis, problem-solving—become a central focus in the business curriculum. Ultimately, approaches covering both soft skills and hard skills may be required, and it will be left to each institution to determine its best approach to balancing or specializing its offerings for business students across this broad spectrum of needs.

Building a One Person Unicorn? This Startup Just Raised $8.7M to Help *(Forbes)*

Panelist Observation

"Higher education may develop coursework or professional development opportunities that support entrepreneurs specifically in this space."

AI Learning Assistants for All

California Community Colleges is rolling out a free AI learning assistant to students and staff at all of its 116 campuses.

The scale of this rollout suggests that attitudes in higher education might in general be shifting away from seeing AI technology primarily as a risk and toward leveraging AI tools to improve students' experiences. If institutions begin to leverage personalized AI-powered learning tools at scale, and if those tools prove to be effective, this could be a significant step toward providing all students with learning support any time, anywhere. However, AI learning assistants are still unproven and carry many risks. For example, they are not capable of replacing human judgment and critical thinking or affective constructs such as compassion. AI learning assistants also carry risks commonly associated with AI tools, such as those related to data privacy and security, accuracy and reliability, and intellectual property and copyright. If the adoption of AI learning assistants rises to the level of a trend, the higher education community will need to grapple with workforce questions and address the evolution of the roles faculty and staff play in student learning.

Exclusive: AI Tutors Coming to California Community Colleges (Axios)

Panelist Observation

"Institutions will need to proactively redesign pedagogy, assessment, governance, and workforce roles. But without careful policy and equity-focused implementation, they risk new forms of dependency, uneven outcomes, and vendor lock-in."

Low-Cost Multistep Reasoning Model

DeepSeek R1 provides users with a multistep reasoning model at low or no cost.

The emergence of free and low-cost multistep reasoning models offers the potential for higher education stakeholders to access expert-level outputs without needing financial resources or institutional support. The potential for this signal to evolve into a trend is uncertain, particularly given that DeepSeek has been banned by multiple local governments around the world. In general, free digital products are thought to carry more data privacy and security risks and create lower-quality outputs than those that are supported by subscription revenue. For these reasons, many questions remain unanswered about whether or how free AI tools can actually support the mission of higher education and not widen digital equity gaps for institutions and students. Moreover, the availability of multistep reasoning models introduces higher-level concerns for educators because they challenge beliefs about which critical thinking capabilities are uniquely human and which can be delegated to machines.

DeepSeek R1 or OpenAI O1? Open Source Disruption Meets Proprietary Power (Galileo)

Panelist Observation

"Low-cost multistep reasoning models ... fundamentally shift the landscape of traditional research by making expert-level synthesis and structured argumentation instantly accessible. This compresses the research process, potentially bypassing the cognitive development that occurs through searching, evaluating, and struggling with sources."

AI-Powered Textbooks

Learn Your Way is a Google Labs research experiment to create multimodal, personalized versions of textbooks.

The emergence of personalized textbooks signals educators' desire to create more engaging and personalized learning experiences. If this technology were adopted in higher education, it could be a powerful tool in meeting individual students' needs and lowering costs. However, shifting away from traditional, static texts will require commensurate adjustments to pedagogical approaches. The technology itself requires further advancement to address obstacles that prevent people from even attempting to use the technology—for example, though each student might have an individualized textbook, there must be some way for learners to share course objectives. Larger roadblocks for personalized textbooks include a lack of clarity about how OER creation contributes to promotion and tenure, the potential for violations of copyright and intellectual property laws, and the difficulties associated with creating accessible content. In this way, though this technology is an impressive example of how AI tools can support personalized learning, it is unlikely to be adopted at scale in the near future.

Learn Your Way: Reimagining Textbooks with Generative AI (Google Research)

Panelist Observation

"The power of personalization must come with the reassurances of accuracy, faculty participation, and critical insight."

3D Model Generation

The multimedia company Tencent introduced Hunyuan 3D, an AI system that in seconds can create 3D models that take human artists days or weeks to accomplish.

With the creation of Hunyuan 3D, VR could soon become much more easily scalable. Despite the promise VR technology holds for enriching and deepening learning experiences, it has stalled in its adoption across higher education, due in large part to the challenges institutions face in accessing the people and tools needed for creating virtual environments and elements that can support meaningful, customized learning. These challenges are especially pronounced for institutions and regions with limited access to financial and/or technological resources. AI-based systems that can easily and quickly render virtual environments and elements promise to expand access to VR-based learning to a significantly wider network of institutions, instructors, and learners. More enthusiastic and widespread adoption, however, will still bring with it the need for humans to remain "in the loop" and to monitor algorithmic outputs for bias, accessibility barriers, and other user-experience concerns. As these capabilities mature, institutions will need to ensure that rapid adoption does not outpace thoughtful attention to learning design, curricular alignment, and broader governance considerations.

Tencent Announces Global Launch of Hunyuan 3D Engine to Empower Creators with Advanced Creation Tools (Tencent)

Panelist Observation

"This is a huge step for instructors and institutions that don't have the resources to create their own VR work and don't want to use off-the-shelf products that don't really meet their needs."

Emotional Management System

EDmotionsAI is an "emotional management system" for K–12 schools that uses AI technology to track students' emotions in real time in an attempt to provide targeted support.

The potential risks associated with introducing emotional tracking technology in higher education make this signal unlikely to rise to the level of a trend anytime soon. Although the underlying goal of improving educators' abilities to be responsive to students' needs is a worthy one, the technology seems to undermine one of the most fundamental elements of instructional environments, which is the relationships between educators and learners. Concerns about data privacy and security, erosion of student trust in instructors and institutions, and deeper implications for human personhood may be sufficient to rule out the adoption of these tools in higher education altogether. Still, seeing that at least some educational environments are adopting emotional management systems indicates that higher education officials must remain aware of the technology and be intentional about setting clear boundaries around what kinds of emotional data should be collected, by whom, and for what legitimate educational purposes, if any.

Developing an AI-Powered Emotional Management System for Students (Tech & Learning)

Panelist Observation

"Students are seeking out opportunities to engage emotionally with AI because they are missing meaningful opportunities to engage with humans to meet their social and emotional needs. We are likely going to see more programs of this nature that are designed to fill the gaping void in more intentionally designed ways, where the alternative right now is leaning on a chatbot for support."

AI GOVERNANCE AND TRUST

THE POWER OF AI TO INFLUENCE USERS AND OPERATE AUTONOMOUSLY RAISES VITAL QUESTIONS ABOUT AUTHORITY AND OVERSIGHT.

AI Detection

In an article in the *Journal of Higher Education Policy and Management*, researchers argue that AI detection tools should not be used in higher education due to "methodological imperfections, violation of procedural fairness, and unverifiable outputs."

Distrust in AI detection tools continues to grow in higher education, due in part to increasing awareness of its inaccuracies and biases, particularly in assessing written materials submitted by students with diverse linguistic backgrounds (e.g., non-native-English-speaking students). The skepticism is also fueled by a string of publicized lawsuits stemming from cases of false positive results and other misuses of detection technologies. For some institutions, these changing tides may prompt a return to traditional forms of assessment that are less susceptible to student misuse of AI (e.g., blue books, Scantron sheets) or a consideration of alternative forms of assessment that enable more authentic and direct faculty–student connection. For other institutions, these developments might instead encourage the integration of AI technologies in ways that enrich connection and learning and help equip students to be responsible adopters and users. In this type of environment, students would be asked to demonstrate their thoughtful and safe use of AI as a feature of their assessment, rather than proving its absence as a condition for assessment.

Heads We Win, Tails You Lose: AI Detectors in Education (*Journal of Higher Education Policy and Management*)

Panelist Observation

"Instructors want to be able to retain certainty and keep the integrity of their assessments. Students fear being falsely accused and the repercussions of that accusation. This is deeply eroding trust in the classroom."

Chatbot Transparency

Proposed California Senate Bill 243 aims to make chatbot use more transparent by requiring operators of chatbots to "issue a clear and conspicuous notification indicating that the companion chatbot is artificially generated and not human."

This California bill is just one signal in what is likely an emerging trend regarding the regulation of AI, not just within the United States but in other parts of the world as well (e.g., the EU AI Act). The higher education community generally acknowledges the potential benefits of chatbots, such as helping students in real time with coursework or administrative tasks. However, chatbots also bring a variety of risks, including the potential for end users to place too much trust in AI-generated outputs. Transparency about chatbots could mitigate such risks, but that transparency also creates new complications and risks. For example, higher education procurement professionals would need to be sure that procured tools comply with the law. Overall, increased transparency about AI use is likely a net positive, even as it increases the governance and oversight institutions will need to take on.

SB-243 Companion chatbots (California Legislative Information)

Panelist Observation

"Transparent communication about AI use is key to promoting less polarized attitudes, moving away from absolute trust versus absolute distrust of AI systems. Instead of immediate responses to information … that center on whether something is AI, we can focus on whether the information is accurate, relevant, or meaningful for our purposes."

Australian Social Media

The Australian government is requiring many popular social media platforms to take steps to prevent children under the age of 16 from creating accounts.

This formal action by the Australian government could foreshadow a broader trend in tightening social media restrictions for people below a certain age. In some assessments, restricting social media and device usage among younger users holds the promise of freeing up developing minds for healthier growth and greater focus on a broader range of pursuits. Youth mental health challenges tied to social media addiction could diminish, engagement in social and recreational activities could increase, and educational outcomes could improve. In this view, such restrictions could position higher education institutions to support more vibrant social communities and expand on students' critical thinking and reasoning skills. Alternatively, restrictions could fail to achieve their desired outcomes, either because youth simply circumvent regulations or because, having gotten wrapped up in the culture of social media that often reinforces unhealthy technology habits, youth might not be ready to engage with technology in intentional and constructive ways. Under such conditions, colleges and universities could see greater numbers of students arriving on campus ill-equipped to discern positive uses of technology from toxic ones, forcing institutions to improve students' digital literacy in this regard. Ultimately, higher education's role will be shaped less by whether such restrictions succeed or fail and more by how intentionally institutions respond to evolving norms around technology, learning, and student development.

The Australian Government Is Protecting Young Australians at a Critical Stage of Their Development, Through World-First Social Media Age Restrictions. These Restrictions Are Now In Effect. (Australian Government)

Panelist Observation

"We know that social media plays a significant role in feelings of anxiety, loneliness, and depression. Providing young people with a longer runway toward developing positive self-concept and feelings of belonging that contribute to good mental health could start to help alleviate the high incidence of mental health issues amongst college students."

THE CHANGING LANDSCAPE OF EDUCATION SYSTEMS

NEW MODELS OFFER ALTERNATIVES TO CONVENTIONAL EDUCATIONAL STRUCTURES, COMPELLING COLLEGE AND UNIVERSITY LEADERS TO RECONSIDER FOUNDATIONAL ELEMENTS OF HOW HIGHER EDUCATION FUNCTIONS.

Two-Hour School Days

Alpha School, an "AI-powered" private K–8 school in San Francisco, uses AI to cover traditional academic subjects in just two hours of personalized learning each day.

Colleges and universities might soon begin enrolling students who have been educated in AI-first schools that emphasize faster and more automated instruction, prompting a reevaluation of admissions requirements and a reconsideration of what it means for students to be "ready" for a postsecondary journey. If AI-first schools prioritize efficiency over the social-emotional and critical-reasoning benefits of traditional education, some students could lag in important areas of preparedness, resulting in the need for more flexible or more personalized approaches to postsecondary onboarding and support. Higher education leaders will need to grapple with what speedier models of education delivery could mean for their own approaches to teaching and learning, with some opting to follow K–12's lead in offering shorter paths to completion and others choosing to preserver the traditional model of higher education. Meanwhile, if the number of K–12 teachers declines or the needed skills change, teacher education degree programs might face a choice between closure or reconfiguring curriculum to support the skills and competencies teachers will need to align with the evolving K–12 landscape.

Inside San Francisco's New AI School: Is This the Future of U.S. Education? *(The Guardian)*

Panelist Observation

"Taking away opportunities for young people to socialize and practice their communication in the settings offered by K–12 schools moves the burden for this to higher education at a time when we're already trying to think about how to get everyone through their college career as quickly as possible."

Inverted, Flexible, Inclusive Pedagogy

Researchers at Northern Illinois University have received an NSF grant to investigate the efficacy of Inverted, Flexible, Inclusive Pedagogy (IFLIP), an approach that evolves traditional flipped instruction to include a wider variety of learning approaches.

The NSF funding of the IFLIP model at scale signals that the higher education community is still interested in shifting away from lecture-based pedagogies toward learning experiences. Such an approach helps higher education foster learner agency and critical thinking, skills that are in high demand in today's technology-driven society. Specifically, models such as IFLIP that center flexibility as a key feature will allow educators to meet the needs of more types of learners, leading to more inclusive teaching practices. However, scaling any pedagogical innovation requires significant resources, a fact that leads some higher education leaders to believe that large-scale implementation of models like IFLIP is more idealistic than realistic. For example, the types of coaching and guiding skills faculty need for the IFLIP model might not be considered traditional teaching skills in higher education. Thus, time and funding must be devoted to professional development and ongoing support. Beyond top-down supports such as time, funding, learning-space renovation, and the reimagining of incentive structures, large-scale pedagogical transformation will also require a bottom-up cultural shift toward innovation and experimentation. If the higher education community can overcome these challenges, however, active learning pedagogies such as IFLIP could be the key to bridging the gap between learners' evolving needs and current institutional capabilities.

Wei-Chen Hung Celebrates NSF Grant Powering Study of Innovative Pedagogy to Boost Preparation of STEM Teachers **(Northern Illinois University)**

Panelist Observation

"Flipped classrooms are not particularly new, but examples such as this one, where they go beyond the experimental stage, can create a ripple effect within the institution itself and beyond."

Law School Accreditation

Officials in Texas plan to stop using the American Bar Association for law school accreditation, instead creating a list of schools whose graduates will be allowed to practice law in the state.

This change in Texas could signal major disruptions to law school processes across the country. In the near term, students seeking law degrees in states that have moved away from ABA accreditation may find the transferability of their credentials limited in certain regions and for certain sectors in the industry. Graduates may also find certain employers unwilling to take a chance on new non-ABA accredited graduates. These challenges risk eroding the perceived value and desirability of law programs in non-ABA states and could negatively impact enrollment trends and funding in the early years of implementation. Longer-term, other states might follow suit, leading to an increasingly complex patchwork of accreditation standards and education quality across the United States and setting potentially problematic precedents for why and how educational standards may be changed. Other industries outside the legal profession might pursue comparable models, leading to a similarly complex and turbulent accreditation landscape for educators, nurses, engineers, and other professionals whose career aspirations are dependent on rigorous credentialing standards. Overall, this signal raises concerns about the uncertainty introduced by deviations from well-established accreditation frameworks. Such risks require higher education officials to carefully manage accreditation changes.

Texas Becomes First State to End ABA Role in Lawyer Admissions *(Reuters)*

Panelist Observation

"Though expanding accreditors and standards could increase the number of degree programs available and potentially reduce costs, it also has the potential to diminish the quality of education and cause confusion for students looking into [law school]."

Athletics as a Top Risk

The education insurance company United Educators identified athletics as a risk for higher education in 2026. This is the first time athletics has ranked in the top ten in the history of this report.

This signal points to a significant concern for higher education, as athletics continues to move away from a peripheral institutional function, acting more like a central driver in institutional priorities and risk. NIL (name, image, and likeness) rules, which establish student athletes' legal right to accept compensation for the use of their identity, and recent changes to conference membership push student athletes closer to the realm of professional athletes by allowing them to accept brand deals and requiring them to travel more. Student athletes are facing more public pressure than ever and are spending less time on campus. All of this creates more financial, legal, and reputational risk for higher education institutions. Though institutions have historically attempted to maintain a separation between athletic and academic operations, lines are blurring as institutions' budgets and governance structures become increasingly entangled.

2026 Top Risks Report: Insights for Higher Education **(United Educators)**

Panelist Observation

"Athletics as a top institutional risk signals growing financial, legal, and reputational pressure on colleges."

ATTEMPTS TO IMPROVE THE ROI OF HIGHER EDUCATION

FINANCIAL PRESSURES WILL CONTINUE TO MOUNT FOR COLLEGES AND UNIVERSITIES, PROMPTING NOVEL APPROACHES TO MANAGING COST AND DEMONSTRATING VALUE.

Program Earnings Test

A U.S. Department of Education advisory panel has recommended that the department require higher education institutions to prove that their degree programs help students earn more money than a high school diploma alone.

Public distrust in the value of higher education might soon translate to tangible policy impacts. Public trust in the value of a college degree remains low, and institutions' need to demonstrate positive impact remains urgent. As a result, calls for increased scrutiny and evaluation of higher education outcomes are met with widespread public support and precautionary institutional compliance. However, early results of these new requirements uncover deep methodological limitations. Disciplinary nuances in job placement and salary indicators are overlooked, leading to the premature closure of programs in areas where longer-term gains in leadership and earning potential aren't demonstrated in near-term outcomes. Fields for which additional graduate study or credentials are commonly needed are also poorly represented in earnings tests based on undergraduate work. Moreover, fields in public service such as education, social work, and nonprofit management, for which higher earning potential is not a primary motivator, could be disproportionately impacted by declines in enrollment and institutional support that can result from earnings tests. If focus on financial returns continues to intensify, a counter movement may emerge, with some institutions doubling down on the intangible benefits of a liberal arts education and establishing alternative pathways for sustainable funding, public support, and credibility.

ED Panel Signs Off on New Earnings Test *(Inside Higher Ed)*

Panelist Observation

"Programs rooted in intellectual discovery, civic formation, or faith-based mission may be disproportionately harmed, not because they lack value but because their value is not primarily measured in wages .... An earnings test, while well-intentioned, could unintentionally marginalize disciplines and pathways that cultivate purpose, service, and intellectual growth beyond salary metrics."

Student Loan Reduction

The U.S. Department of Education is set to reduce student loan programs in 2026.

The planned reduction in federal student loan programs signals a potential decrease in access to higher education for students who cannot afford the cost of attendance. The optimistic perspective is that shifts that encourage students to borrow less money to fund their education will demand that institutions reevaluate their funding models and reduce the financial burden on students. Particularly considering that students from low-income backgrounds would be disproportionately affected by these shifts, institutions are likely to try to find solutions that enable them to preserve their commitments to socioeconomic mobility goals. Less optimistically, the reduction in federal funding will offload some additional student debts to third-party lenders not beholden to the mission and values of the pursuit of education, which could result in a narrowing of funding opportunities for students and professions deemed less capable of paying back substantial loans. This could lead to dramatic enrollment declines and even closures of programs and schools demonstrating lower earning potential for their students, significantly reshaping the institutional landscape and public perceptions of whether and why the pursuit of postsecondary education is worthwhile, at least in certain disciplines.

Major Student Loan Limits Set To Take Effect, With Big Implications For Borrowing *(Forbes)*

Panelist Observation

"Reduced loan availability may lower six-year graduation rates, as prior research shows that delays in degree completion are often linked to financial constraints. If borrowing options decline, students may need to work more hours, enroll part-time, or pause their studies."

Apprenticeship for Credit

Thomas Edison State University and the New Jersey Department of Labor and Workforce Development have launched an initiative to develop apprenticeship programs that earn college credit.

This apprenticeship program is a signal of increased interest in using higher education to prepare students for the workforce. Experiential and work-integrated learning is becoming a critical element of institutional offerings as institutions respond to workforce demands, rising costs, and the growth of competency-based credentials. This evolution requires institutions to work collaboratively with industry leaders and communities, reevaluate the role of apprenticeships in the curriculum, and possibly even reimagine curriculum on a larger scale. At the same time, increasing apprenticeships carries risks such as lower enrollment in traditional degree programs without a commensurate increase in enrollment of new students. Ultimately, apprenticeships might be used to create more practical opportunities for learners, increase enrollment, and improve retention. However, to achieve those outcomes, higher education leaders will need to grapple with difficult questions about the purpose of higher education and the role institutions play in workforce preparation and formal credentialing.

Thomas Edison State University and N.J. Department of Labor Launch Statewide Apprenticeship Degree Initiative **(Thomas Edison State University)**

Panelist Observation

"Over time, this could lead to new standards for educational credentials, prioritizing practical experience alongside academic achievement. [T]he evolving landscape may encourage students from diverse backgrounds to consider these pathways, increasing access to higher education while simultaneously challenging traditional methods of learning and assessment."

Administrative Service Consolidation

The San Francisco Bay Region Network consolidates back-office administrative services for multiple higher education institutions in order to reduce costs and increase efficacy.

The centralization of processes and services is a common solution to budgetary pressures within an institution or system. The SFBRN case is unique in that it consolidates services across institutions, signaling a potential increase in such cross-institutional collaborations. The lingering question is whether this approach could gain traction with other institutions in the future. Given the current social and political pressures higher education faces to increase efficiency, reduce costs, and prove value, multi-institution collaborations such as SFBRN could become a trend. However, this type of consolidation does carry some risk. For example, staff and faculty at institutions are accustomed to contacting people they know to help with administrative work. By eliminating some of these personal relationships, institutional leaders risk increasing staff and faculty frustration and eroding a culture of personalized support, at least in the short term. However, with time and careful governance, administrative consolidation could lead to significant cost savings.

SFBRN Overview (The San Francisco Bay Region Network)

Panelist Observation

"Outcomes ultimately hinge on governance. Reinvest savings wisely and consolidation can strengthen regional systems; fail to do so and it may accelerate campus decline and widen equity gaps."

EXTERNAL PRESSURES ON EDUCATION STAKEHOLDERS

SOMETIMES DEVELOPMENTS THAT APPEAR DISTANT FROM INSTITUTIONAL MATTERS COME TO HAVE SIGNIFICANT IMPACTS ON HOW COLLEGES AND UNIVERSITIES FUNCTION.

Texas Water Supply

Texas officials announced that the state's water supply might not be able to fulfill demand by 2030.

This announcement from Texas officials suggests that the impacts from climate change on daily life might soon increase significantly, a signal that will almost certainly be part of a trend in the very near future. In regions across the United States, water is becoming increasingly scarce due to usage patterns that are straining the supply of water and driving up costs. In response, higher education institutions might be forced to make adjustments such as closing drinking fountains and limiting restroom usage. Such cutbacks sometimes have the counterintuitive effect of decreased future funding, which could turn short-term inconveniences into long-term risks in deferred maintenance for facilities and infrastructure, as well as budget cuts to programs and operations. If pressures on water systems prompt the migration of large numbers of residents away from certain regions, that could place additional stress on public institutions in those areas due to a shrinking tax base for support and a smaller local pool of potential attendees. Low-income students in these regions are likely to experience disproportionate impacts from drought conditions, threatening the success and sustainability of their educational journeys. Even in these circumstances, many institutions could experience a renewed sense of purpose in serving their communities, investing in new degree programs and initiatives focused on climate research and sustainability efforts. If drought conditions intensify, institutions will need to consider how environmental stressors factor into strategic decisions about infrastructure, enrollment, academic offerings, and regional engagement.

Texas Is Running Out of Water. Here's Why and What State Leaders Plan to Do about It. *(The Texas Tribune)*

Panelist Observation

"Water scarcity, along with other basic human needs, has potential to reshape many aspects of higher education, from campus operations, to student life, to academic programs."

Family Assistance Freeze

The U.S. Department of Health and Human Services froze childcare and family assistance grants in California, Colorado, Illinois, Minnesota, and New York to investigate fraud and misuse.

This federal freeze and other changes to student services (such as reductions in federal loan programs) could signal a downward trend in social support services in the United States. Such a shift would impact higher education by forcing some learners to choose between their education and other financial needs, potentially leading to an increase in stop-outs. Institutions might be able to mitigate the impacts of these disruptions by offering additional support such as their own family assistance grants, but in a time when budgets are already shrinking, such an approach is unlikely. Notably, nontraditional learners are most likely to be impacted by interruptions to support services. Thus, there may be a widening of the divide between those who do and do not have access to higher education. Drops in enrollment would also disproportionately impact institutions such as community colleges and regional campuses that tend to serve larger proportions of students from certain socioeconomic backgrounds. Ultimately, this signal raises concerns about higher educators' ability to support social mobility and economic advancement.

HHS Freezes Child Care and Family Assistance Grants in Five States for Fraud Concerns
(U.S. Department of Health and Human Services)

Panelist Observation

"Ultimately, this situation may force policymakers and educational leaders to reconsider funding strategies that support student parents and ensure that higher education remains accessible to all."

EMERGING PRACTICES

THE 11 INITIATIVES DESCRIBED BELOW DEMONSTRATE WORK BEING DONE ON COLLEGE AND UNIVERSITY CAMPUSES TO EXPERIMENT WITH NOVEL WAYS THAT TECHNOLOGY CAN BE USED TO FURTHER THE MISSION OF HIGHER EDUCATION.

Adaptive Governance Design as Policy Infrastructure for Teaching and Learning Innovation

Frontier Nursing University is engaged in an exploratory initiative to examine how governance and approval processes shape institutional agility in teaching and learning. As artificial intelligence, digital learning platforms, and evolving accreditation expectations accelerate change across higher education, traditional committee structures and decision pathways can unintentionally slow innovation.

Rather than focusing solely on new instructional tools or pedagogical redesign, this effort considers governance itself as policy infrastructure for adaptive capacity. The working premise is that effective teaching and learning innovation depends on clearly defined authority pathways, transparent committee scopes, and aligned decision-making processes.

The university is currently piloting and refining a draft domain-based governance model intended to clarify approval processes, reduce redundancy, and improve coordination across academic and operational units. These concepts are in active consultation and iterative review; no permanent structural changes have been finalized. Faculty and staff stakeholders are engaged in dialogue to evaluate how governance structures can more responsively support emerging technologies, curricular adjustments, and compliance requirements.

This emerging work treats governance redesign not as a corrective action but as a forward-looking strategy to align institutional policy processes with the pace and complexity of contemporary teaching and learning environments.

ELSEI Co-Regulator (ECR): AI as a Pedagogical Co-Regulator for Self-Regulated Learning

The ELSEI Co-Regulator (ECR) is an emerging, AI-driven initiative developed within the Master ELSEI (E-Learning and Intelligent Educational Systems) program at the Ecole Normale Superieure, Abdelmalek Essaadi University (Morocco). The project explores a novel paradigm in which artificial intelligence functions not as a content generator but as a pedagogical co-regulator that supports learners' self-regulation processes in real time.

ECR analyzes nonintrusive behavioral traces from learning management system interactions—such as time on task, navigation patterns, and activity sequences—to infer key learner states, including cognitive load, attention, and motivation. Based on these signals, the system delivers brief, context-sensitive micro-interventions (e.g., pacing suggestions, reflective prompts, and task reframing) designed to help students maintain productive learning conditions without disrupting their workflow.

The initiative responds to growing concerns in higher education regarding cognitive overload, learner disengagement in digital environments, and the ethical implications of AI deployment. By prioritizing privacy-aware analytics, transparency, and learner agency, ECR demonstrates how adaptive support can be achieved without reliance on biometric sensing or intrusive monitoring.

A simulation-based demonstration interface is currently available to illustrate system behavior and design principles, while the full platform is under active development and iterative evaluation across select graduate courses. Early pilot work focuses on feasibility, usability, and instructional alignment.

As an emerging effort, ECR signals a broader shift from AI as tutor toward AI as learning climate regulator. Its modular architecture and LMS-integrated design suggest strong potential for scalability and transferability across higher education contexts seeking responsible, human-centered AI innovation.

EduGenAI and AI-Hub: Building a National AI Infrastructure for Tertiary Education, Together

The Netherlands has taken a deliberately different approach to AI in higher education: Rather than procuring a commercial solution, all 113 public institutions—universities, universities of applied sciences, and vocational colleges—share the ambition of co-creating one.

EduGenAI is a privacy-first generative AI platform hosted on Dutch sovereign infrastructure. But the platform is almost secondary to the process. Institutions are not handed a product—they are shaping it. During the current pilot phase, educators and students are exploring what AI-supported teaching can actually look like, with pilot findings directly informing the platform's development. The architecture is modular, consisting of an AI Hub that connects users to multiple language models (open-source and commercial) with Dutch-language filters and education-specific guardrails, designed to evolve as the sector's understanding deepens.

During the current pilot phase, educators and students across the sector are exploring what AI-supported teaching can actually look like. These pilots directly inform the platform's development, creating a feedback loop between practice and infrastructure. Equally distinctive is the sector-wide commitment to AI literacy, not as a separate program but embedded in the collaboration itself. Participating institutions simultaneously develop shared frameworks for students, educators, and institutional leadership.

The underlying architecture reflects this modularity: a sovereign AI hub giving access to multiple language models, Dutch-language guardrails, and education-specific filters, designed to evolve as the sector's understanding deepens.

At a moment when many institutions are choosing among commercial platforms they don't control, the Dutch sector is asking a harder, more interesting question: What should AI in education be for, and who gets to decide?

University-to-Business Design Framework: A Practice of the UPCEA Hallmarks of Excellence in Credential Innovation

The University-to-Business (U2B) Design Framework is a human-centered approach that connects academic program development directly with employer workforce needs. Rather than designing credentials solely within academic units, the framework positions employers as active partners in the learning design process. Developed by UPCEA and Peer Learning Leaders at member institutions, the framework consists of five iterative stages with Guiding Practices and Guiding Questions at each: Research, Validate, Ideate with Employers, Prototype, and Iterate. Through these stages, institutions co-create microcredentials and workforce programs that respond to real-time labor market demands and evolving industry skills.

This model shifts teaching and learning from a traditional, institution-centered model toward a collaborative ecosystem approach that integrates employers, learners, and institutions. Faculty and program designers engage directly with industry stakeholders to understand emerging skills, design relevant learning experiences, and pilot new credentials. The iterative structure encourages rapid experimentation and continuous improvement, allowing institutions to test ideas through small-scale pilots and refine them based on feedback from employers and learners.

The U2B Framework helps colleges and universities move beyond transactional partnerships toward collaborative, demand-driven program development. By combining the phases, institutions can create credentials and workforce solutions that better meet the evolving needs of employers and learners. By aligning credential innovation with external workforce forces and embedding employer engagement into the design process, the U2B Framework represents a forward-looking model for responsive, partnership-driven teaching and learning in higher education.

AI-Supported Learning in Kenyan Teacher Education: Integrating the Three Dots Platform into a Public University Course

This project is an early-stage pilot study (February–March 2026) testing AI-supported learning tools in a specific and under-documented context: a public university in semi-rural Kenya. While the Three Dots platform itself has been deployed in over 15 countries, this particular integration into a Kenyan teacher education course represents a new application with a formal mixed-methods research design. The project is testing how structured AI tools delivered through WhatsApp function in a mobile-first, low-infrastructure environment and how they shape pre-service teachers' emerging AI literacy, both of which represent frontier questions in research into AI in education.

The project's core innovation is technological: deploying AI-powered learning tools through a messaging platform (WhatsApp) to overcome infrastructure barriers in a resource-constrained educational setting. It directly addresses the democratization and efficiency of educational technology by demonstrating that sophisticated, AI-supported pedagogy does not require high-end digital infrastructure. It also intersects with social factors (equity, access, inclusive design) and political factors (national data protection compliance, institutional governance of AI), but the primary contribution is a proof-of-concept for how emerging AI and messaging technologies can be repurposed as scalable learning environments.

This pilot study reflects the technological dimension of the STEEP framework by testing how AI-powered learning tools, delivered entirely through WhatsApp, can transform a widely used messaging platform into a structured, pedagogically grounded learning environment for university students in a low-infrastructure setting. The project directly addresses the technological trend of democratizing AI access in education by demonstrating that meaningful, AI-supported learning can operate within the constraints of mobile data bundles, inconsistent Wi-Fi, and basic smartphones, conditions shared by millions of learners across sub-Saharan Africa and other regions of the Global South. If validated, this approach offers a replicable model for expanding AI-enhanced teaching and learning to contexts that are typically excluded from the research base for AI in education.

TRAIL Guides

The TRAIL Guides (Teaching and Responsible AI Literacy) program is a new initiative led by the department of Teaching and Learning Technologies in Northwestern University IT. This service is designed to give faculty and students a dedicated space to openly discuss and collaborate on the question confronting higher education today: How does generative AI affect teaching and learning? Importantly, these conversations take place outside the classroom, freed from the pressures of grades and formal assessments. This program employs undergraduate students as AI literacy guides, consultants, and co-educators, recognizing their critical perspective and amplifying their voices to our teaching community.

The TRAIL Guide program shifts the conversation about AI literacy and use from policy and compliance into a participatory teaching-and-learning practice between students and faculty. Instead of working to restrict or detect student AI use, the TRAIL Guide program invites students to contribute to a different approach that includes them as partners.

TRAIL guides receive training in learning science and design, as well as in generative AI and its potential applications for—and risks to—teaching and learning. The training and research highlight responsible AI use, transparency, and pedagogical efficacy. Once trained, TRAIL guides will develop pathways for student outreach and education, consult with individual faculty rethinking assignments and assessments, and co-facilitate workshops for faculty. Guides will develop student-facing resources and blog posts or newsletter articles that touch on emerging patterns of how students are actually using AI in academic contexts.

The TRAIL Guide program reframes issues of the student use of generative AI, moving from academic integrity and compliance to leading with trust and curiosity, and from tool mastery and efficiency to relationships and reflection. A common concern about the proliferation of AI tools in higher education is the reciprocal erosion of trust between faculty and students. The TRAIL Guide program treats students not as risks to be managed but as partners in shaping responsible uses of AI in academic work.

Pathway2Futures: From Exploration to Action Using Virtual Reality to Align Career Discovery with Academic Pathways

Tallahassee State College has launched a Career Academy using a virtual reality (VR) career exploration lab, Pathway2Futures, to transform career discovery into an immersive, structured experience. In the Pathway2Futures VR Lab, students explore real-world work environments and job tasks aligned to their academic programs. The experience is intentionally paired with guided reflection and advising, resulting in a personalized career development action plan that aligns with each student's academic pathway.

At the college's Career Academy, career exploration is no longer confined to brochures, static interest surveys, or brief advising appointments. Instead, the career exploration lab transforms the discovery process into an immersive, structured journey, one that matches the complexity and opportunity of the future workforce.

Teaching and Visualization Lab

The Teaching and Visualization Lab is a black box room that offers 217 degrees of immersive projection onto one smooth, curved projection screen that measures 85 feet in length.

The room can host a variety of events, including high-impact learning activities such as immersive, student-led presentations and digital poster sessions; technology-rich interactive instruction sessions; creative digital media exhibits; simultaneous display of up to eight devices for collaboration and presentation; presentations of large-scale visualizations and simulations; and research communication.

This is a one-of-a-kind space. It creates an immersive experience through hardware and software development. It empowers researchers to develop virtual environments that will present VR experiences without a headset. It supports students and faculty with creative projects and scholarships and can utilize the HD projection and spatial audio to engage and inspire the campus community.

Outwondering the Algorithm: Teaching Curiosity as the New Mastery in a World of AI

Outwondering the Algorithm is a framework and pilot program developed by a design educator at Pikes Peak State College, a two-year state institution in Colorado Springs. It positions curiosity—not AI fluency or prompt engineering—as the foundational skill educators need to cultivate in learners navigating a world increasingly shaped by generative AI. The framework uses a breathing metaphor to reframe creative and critical thinking as interdependent processes: divergent thinking (wondering, exploring, gathering ideas) is the inhale; convergent thinking (synthesizing, deciding, making) is the exhale. It argues that decades of standardized, answer-driven instruction have trained students to hold their breath, skipping exploration and jumping straight to conclusions. The framework introduces the concept of "owned knowledge," learning a student can explain, apply, and defend because it was earned through genuine curiosity rather than produced by automation.

A six-session pilot course for educators launched in March 2026, representing the first direct application of the framework beyond a single campus. The pilot is designed to explore whether the model can help educators from varied contexts redesign learning around the capacities AI cannot replicate, including comfort with ambiguity, cross-domain imagination, and the ability to generate questions no algorithm would produce.

Outwondering the Algorithm addresses a fundamental shift in what learners need and how learning is experienced in the age of generative AI. At its core, this project responds to the reality that decades of standardized testing and compliance-driven curricula have trained students to skip curiosity and jump straight to "the right answer," a habit that AI has now rendered both visible and unsustainable.

The Dual-Twin Framework: Leadership Governed Human–AI Collaboration

The Dual-Twin Framework is a conceptual approach that examines how leaders and institutions structure human–AI collaboration in environments characterized by complexity, uncertainty, and rapid technological change. Rather than centering on specific AI tools or instructional applications, the framework focuses on leadership cognition, governance, and organizational decision-making as critical determinants of how AI influences teaching and learning.

At the core of the framework is the recognition that AI-enabled environments require two complementary forms of intelligence. One emphasizes analytical reasoning supported by AI, including structured analysis, data synthesis, and evidence-informed inquiry. The other emphasizes developmental and reflective leadership judgment, including ethical reasoning, sensemaking, and alignment with institutional mission and values. The framework proposes that educational outcomes are shaped by how intentionally these modes are coordinated rather than by the presence of AI technologies alone.

This work reflects an organizational perspective on teaching and learning innovation by highlighting leadership structures and governance practices as mediating factors in AI adoption. The framework is designed to help leaders, educators, and academic support professionals think more deliberately about decision authority, accountability, and reflective practice as AI becomes embedded across instructional and academic support systems.

As an emerging project, the framework is intentionally adaptive. It is not a fixed model or prescriptive solution but a sensemaking structure intended to evolve alongside advances in AI and changing educational contexts. Its value lies in supporting inquiry, dialogue, and responsible experimentation around human–AI collaboration in teaching and learning.

The framework also responds to changing expectations of learners and educators, who are increasingly required to navigate uncertainty, ambiguity, and accelerated information flows. By treating human–AI collaboration as a social practice rather than a technical implementation, the Dual-Twin Framework highlights the importance of trust, responsibility, and a shared understanding of shaping learning experiences. In this way, it aligns with broader societal shifts influencing higher education, including evolving professional identities, ethical concerns about AI use, and the need for leadership models that prioritize human judgment alongside computational capability.

AI Impact Center: A Rural Model for Community-Embedded AI Innovation

The AI Impact Center at William Penn University represents a new model for how small, rural institutions can lead in applied artificial intelligence. Rather than isolating AI within research labs or computer science departments, this initiative embeds AI directly into community infrastructure, workforce development, and nonprofit service delivery. The model integrates two pillars:

- AI-Powered Community Resource Platform (Help Hub): A privacy-first, AI-driven system that matches real-time community needs with donations and services using natural language processing, computer vision, and QR-based access points.
- AI Impact Center: A hands-on education and innovation hub where students build AI tools for nonprofits and small businesses while gaining workforce-ready skills.

This dual approach simultaneously addresses the two rural challenges of inefficient resource distribution and limited AI adoption among small organizations. Students develop predictive analytics dashboards, AI automation tools, and custom workflow systems for local partners. Community organizations receive affordable, tailored AI solutions. Learners gain portfolio-backed, real-world experience.

The AI Impact Center highlights innovation in teaching and learning by transforming AI from a theoretical subject into a community-embedded, applied learning model. Students engage in project-based learning where they design, build, and deploy real AI tools for nonprofits, small businesses, and civic partners, shifting instruction from simulation to authentic implementation. Learning outcomes extend beyond technical skill to include systems thinking, ethical governance, and community engagement.

The program operates under a Responsible AI framework emphasizing bias audits, human oversight, privacy-by-default design, and community advisory input. Early projections include 250+ community resource matches, 100+ learners trained annually, and multiple AI deployments for local partners. By integrating equity, workforce development, and ethical governance into AI deployment, the AI Impact Center demonstrates how rural institutions can respond to societal shifts in technology while strengthening community resilience and economic mobility.

METHODOLOGY

The Horizon Report methodology is grounded in the perspectives and knowledge of an expert panel of practitioners and thought leaders from around the world who represent the higher education, teaching and learning, and technology fields. Members of this report's panel were sought for their unique viewpoints, as well as for their contributions and leadership within their respective domains. The panel represents a balance of global contexts. We also sought balances in gender, ethnicity, and institutional size and type. Dependent as the Horizon Report is on the voices of its panel, every effort was made to ensure that those voices were diverse and that each could uniquely enrich the group's work.

This expert panel research utilized a modified Delphi process and elements adapted from the Institute for the Future (IFTF) foresight methodology. In the Delphi process, an organized group of experts discusses and converges on a set of ideas about the future on the basis of their own expertise and knowledge. For this report, panelists were tasked with responding to and discussing a series of open-ended prompts, as well as participating in subsequent rounds of consensus voting (see sidebar "Panel Questions"), all focused on identifying the trends and signals of change that will be most important for shaping the future of postsecondary teaching and learning. Ideas for important trends and signals emerged directly from the expert panelists and were voted on and further refined by the panel. EDUCAUSE staff provided group facilitation and technical support but had minimal influence on the content of the panel's inputs and discussions. This was done to protect the core intent of the Delphi process—capturing a reliable consensus from a group of experts that represents their collective expertise and knowledge.

The framing of the questions and voting across each round of panel input was adapted from IFTF's foresight methodology and drew upon the IFTF framework and process for collecting evidence and impacts for trends. Ensuring an expansive view across all the many factors influencing the future of higher education, the IFTF "STEEP" framework enabled our panel to focus on social, technological, economic, environmental, and policy trends. This effectively broadened the panel's input and discussions beyond the walls of higher education to more explicitly call attention to the larger contexts within which teaching and learning takes place.

New to this year's report, panelists' identification and discussion of signals of change (formerly key technologies and practices) was intended to uncover "edge case" practices or shifts in the higher education landscape that are more nascent than past Horizon Reports have included. Although these signals might not yet be widely visible or experienced today, their potential to shape higher education warrants our attention as we weigh priorities for preparing our institutions for tomorrow.

As they provided their inputs and engaged one another in discussion, panelists shared news articles, research, and other materials that would help reinforce their inputs and provide evidence for their particular viewpoints on current and future trends. In addition to enriching the panel's discussions and supporting the panel's voting and consensus processes, these materials were collected by EDUCAUSE staff for use as evidence and further reading in the writing of this report. In the Delphi and IFTF methodologies, these collected materials also serve the purpose of ensuring that the panel's ideas about the future are sufficiently grounded in "real" data and trends.

For information about research standards, including for sponsored research, see the EDUCAUSE Research Policy.

Panel Questions

STEEP Trends

Round 1 (for each STEEP trend category):
In the appropriate STEEP category below, nominate trends that will impact the future of teaching and learning in higher education. Your nomination should include (1) a sentence to describe the trend as the title of the card; (2) how this trend will impact teaching and learning in higher education; (3) links to supporting news or research (4); and your name. To enrich the content, we encourage you to comment on the posts of your colleagues to add your thoughts.

Round 2 (for each STEEP trend category):
The list below summarizes the trends provided by this year's Horizon panel. Please rank-order the trends based on which you believe will have the most/least influence on the future of teaching and learning in higher ed. From the list of trends on the left, drag the trends you think will have the greatest influence into the right-hand list. Then, rank those trends from most influential to least influential.

Round 3 (for each of the top trends identified by the panel):

- Please provide additional evidence supporting this trend. Make sure that your evidence is relevant to the future of teaching and learning in higher ed. Examples of good evidence include recent (i.e., within the last year) research reports, credible news stories, personal experiences, etc.
- What potential impacts might this trend have on the future of teaching and learning in higher education? Please be specific. Describe how this trend would impact not only teaching and learning in higher ed but also how changes would then affect stakeholders and different departments/units, academics, business operations, strategic planning and decision-making, etc.

Signals of Change

Round 1: Scan the higher education environment, via research and firsthand observation, for specific examples of new behaviors, products, initiatives, policy positions, community actions, data points, technologies, or any other signal of change. Look for concrete examples, not general trends. When you find a signal of change, run it through the following checklist. Is it (1) Concrete, (2) Current, (3), and Compelling.

Title: Give your signal a short, descriptive title.

What: Write a brief, factual description (no opinions interjected here).

So what: Next, think about the implications of this signal. Answer the question, "so what?" How might this signal shift fundamental ways we organize ourselves, learn, work, eat, build relationships, etc., in higher education? Use the following prompts to guide your thinking:

- What's changing? What are we moving from and what are we moving toward?
- What are the implications for teaching and learning in higher education? What does the signal suggest about how the future could be different?

Source: Include the source, including hyperlink where possible.

Round 2: In this survey, you will be presented with the signals of change we are currently considering for inclusion in the final report. For each signal, please (1) read the signal and the associated link to supporting evidence and (2) add any additional implications for the future of higher education that you think of. Note that your contribution might be directly included in the report. Please do not use generative AI to write your response (beyond light editing of your original words).

We currently have 19 potential signals, which you will see in this survey. The signals will be presented to you in random order. If you are not able to contribute to every single one, that is OK. We only ask that you contribute to as many as you can, favoring quality of responses over quantity.

(For each of the 19 signals) What other implications for the future of higher education can you imagine from this signal?

EXPERT PANEL ROSTER

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Mark McCormack
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