Global nebulaONE (Cloudforce) in Higher Education Sweep – Full Sweep

21 August 2026 – Full sweep: 27 named institutions

This report presents the full global sweep for institutional deployments of Cloudforce's nebulaONE® platform in higher education, following the structure of the companion sweeps of Claude for Education, ChatGPT Edu and Manus AI and superseding the two pilot phases. It identifies 27 named institutions (29 deployment rows) with per-row verification URLs, against Cloudforce's claim of more than 90 institutions globally – a gap discussed under Regional Coverage below.

Method

Three techniques were combined.

First, domain-dork searches across academic TLDs (.edu, .ac.uk and, per the revised brief, the wider site:*.ac.* pattern), noting that many European countries (Ireland, the Netherlands, Sweden, Denmark and others) have no second-level academic domain, so country-level searches were run for those regions as well.

Second, vendor and press releases (Cloudforce, Microsoft, PR Newswire, sector press) were used as leads and traced to institutional sources where possible; vendor-only rows are marked.

Third – the most productive technique – subdomain enumeration: every nebulaONE tenant portal shares the page fingerprint “Instance of nebulaONE.ai”, which surfaces live institutional instances (e.g. bearcatgpt.uc.edu, owlone.fau.edu, nebulaone.derby.ac.uk) that have no press announcement at all. This fingerprint is recommended as the primary discovery instrument for future sweeps.

A fourth technique, contributed by the study lead after review of the draft, proved its worth immediately: a progressive exclusion-chain series (“nebulaone” “university” -site:uk -site:edu -site:com …), which enumerates the residue left after subtracting known TLDs. These surfaced Huddersfield (UK), Ivey Business School at Western University (Canada) and an as-yet-untraced Australian signal – all missed by the semantic searches above.

The lesson is methodological: LLM-mediated search runs through API intermediaries that return one curated page of results, handle exclusion operators inconsistently, and reward semantic rather than enumeration-style queries, so residue-enumeration and string-pattern searches must be specified explicitly and, where possible, run on raw search engines. Both techniques are adopted as standard instruments alongside the fingerprint. The brief’s point about tedious country-by-country university lists is well taken: a once-per-semester job to build and refresh per-country university/domain lists has been logged and would make the TLD-less European search systematic rather than ad hoc.

The nebulaONE Landscape

NebulaONE is a multi-modal generative AI “gateway” developed by Cloudforce, a Maryland-based Microsoft partner. Unlike single-vendor products such as ChatGPT Edu or Claude for Education, nebulaONE is an aggregator: it is deployed inside each institution’s own Microsoft Azure tenancy and provides a single interface to a large catalogue of models – OpenAI, Anthropic, Meta, Mistral, DeepSeek and others – together with a no-code agent builder.[1] The platform was formally launched

[1]Cloudforce. (2025, March 12). Introducing nebulaONE®: The Azure-based enterprise GenAI platform powering innovation in education, healthcare, and beyond. Retrieved from https://gocloudforce.com/nebulaone-ai-launch/

for higher education on Microsoft Azure in April 2025, although the earliest institutional deployment (UCLA Anderson School of Management) dates from mid-2024.[2]

Momentum through 2025–26 has been considerable. In November 2025 Cloudforce was named Microsoft's 2025 Education Partner of the Year, at which point over 85 universities, school systems and academic medical centres were using the platform.[3] In January 2026 the company closed a $10 million Series A led by Owl Ventures with participation from M12 (Microsoft's venture fund), reporting more than 3 million users across roughly 90 institutions in the US, Canada, UK, EU, Australia and New Zealand, and a 100% subscriber retention rate in 2025.[4]

Two characteristics distinguish nebulaONE from the enterprise offerings of the frontier labs. First, private deployment: the platform runs entirely within the institution's own Azure subscription, so data never leaves institutional control – a design that eases FERPA, GDPR and HIPAA compliance and has proved persuasive to procurement and information-security teams.[5] Second, consumption-based pricing: institutions pay for what they consume, with built-in budgets and chargeback reporting, avoiding per-user licensing fees.[6] This makes an "AI for All" entitlement affordable even where most of the community are light users – a materially different tariff structure from per-seat products, and one reason several universities have chosen it as their equity layer.

Summary of Confirmed Deployments

The table on the next two pages lists all named deployments, sorted alphabetically by short name (country codes: US, UK, CA). Rank is the Times Higher Education World University Rankings 2026 position: Oxford and Case Western Reserve are verified against THE and institutional sources; entries marked "c." are best-estimate placements or bands pending verification; "NR" means not ranked in the THE world table; "n/a" marks specialist institutions excluded from general world rankings. "Users" flags staff, students or both, naming a category only where the deployment is specific to it; "Unstated" marks live portals whose covered population is not publicly documented. Every row carries a verification URL (https:// prefixes omitted for space); rows verified only by a vendor or Microsoft page – leads rather than definitive sources under the study's evidence rules – are marked "(vendor)". No institution has publicly disclosed contract values; all deployments use nebulaONE's consumption-based model billed through the institution's Azure tenancy.[7]

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[2]Cloudforce. (2025, April 16). Cloudforce launches nebulaONE on Microsoft Azure: The leading AI gateway for higher education [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-launches-nebulaone-on-microsoft-azure-the-leading-ai-gateway-for-higher-education-302430687.html

[3]Cloudforce. (2025, November 12). Cloudforce named Microsoft Partner of the Year: Global recognition validates transformative impact of nebulaONE® [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-named-microsoft-partner-of-the-year-global-recognition-validates-transformative-impact-of-nebulaone-cloudforces-secure-ai-platform-302613661.html

[4]Cloudforce. (2026, January 9). Cloudforce secures $10M Series A from Owl Ventures and Microsoft to democratize safe, equitable AI in education, healthcare, and beyond [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-secures-10m-series-a-from-owl-ventures-and-microsoft-to-democratize-safe-equitable-ai-in-education-healthcare-and-beyond-302656775.html

[5]Cloudforce. (2025, November 12). Cloudforce named Microsoft Partner of the Year: Global recognition validates transformative impact of nebulaONE® [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-named-microsoft-partner-of-the-year-global-recognition-validates-transformative-impact-of-nebulaone-cloudforces-secure-ai-platform-302613661.html

[6]Cloudforce. (2025, March 12). Introducing nebulaONE®: The Azure-based enterprise GenAI platform powering innovation in education, healthcare, and beyond. Retrieved from https://gocloudforce.com/nebulaone-ai-launch/

[7]Cloudforce. (2025, April 16). Cloudforce launches nebulaONE on Microsoft Azure: The leading AI gateway for higher education [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-launches-nebulaone-on-microsoft-azure-the-leading-ai-gateway-for-higher-education-302430687.html

Short name	Country	Rank (THE 2026)	Domain	Local brand	Users	Scope	Announced	Verification URL
Birmingham	UK	c. 93	bham.ac.uk	nebulaOne	Unstated	Campus AI and agent platform, portal live	2025–26	ai.bham.ac.uk
Cal State Fullerton	US	NR	fullerton.edu	TitanGPT	Both	Campus-wide	Jan 2025	fullerton.edu/it/projects/titangpt/
Cambridge Judge	UK	c. 4 (Cambridge)	jbs.cam.ac.uk	CJBS.AI	Staff	School-wide, agents serving staff and students	2025–26	g2.com/products/nebulaone-ai/reviews (third-party review)
Case Western Reserve	US	145	case.edu	CWRU AI	Both	Campus-wide	Oct 2024	case.edu/utech/about/utech-news/university-launches-cwru-ai-portal
Cincinnati	US	c. 251–300	uc.edu	Bearcat GPT	Unstated	Portal live	2025–26	bearcatgpt.uc.edu
Derby	UK	c. 1001+	derby.ac.uk	–	Unstated	Portal live	2025–26	nebulaone.derby.ac.uk
Florida Atlantic	US	c. 601–800	fau.edu	OwlONE	Unstated	Portal live	2025–26	owlone.fau.edu
George Mason	US	c. 301–350	gmu.edu	PatriotAI	Both	Campus-wide	Jun 2025	president.gmu.edu/news/2025-06/introducing-patriotai-georges-masons-new-enterprise-ai-platform
Huddersfield	UK	c. 601–800	hud.ac.uk	nebulaOne	Unstated	Portal live	2025–26	ai.hud.ac.uk
Leeds	UK	c. 130	leeds.ac.uk	–	Unstated	Portal live	2025–26	nebulaone.leeds.ac.uk
Lincoln	UK	c. 601–800	lincoln.ac.uk	–	Both	Campus-wide	Oct 2025	studentnews.lincoln.ac.uk/student-service/lincoln-embarks-on-next-phase-of-ai-deployment-with-microsoft-and-cloudforce-partnership/
London Business School	UK	n/a	london.edu	–	Both	School-wide	2024–25	gocloudforce.com/nebulaone-ai-launch/ (vendor)
Manchester	UK	c. 53	manchester.ac.uk	NebulaONE	Staff (early access)	Approved tool; early-adopter onboarding	2025–26	staffnet.manchester.ac.uk/ai-hub/tools-and-resources/
Manchester Metropolitan	UK	c. 601–800	mmu.ac.uk	MMUnebulaONE	Unstated	Portal live	2025–26	nebulaone.mmu.ac.uk
Mary Washington	US	NR	umw.edu	MaryWash AI	Unstated	Portal live	2025–26	marywashai.umw.edu
Maryland Baltimore	US	NR	umaryland.edu	NebulaOne	Staff (on request)	AI toolkit; centrally managed licence	2025	umaryland.edu/ai/ai-toolkit/nebulaone.php
Maryland College Park	US	c. 100	umd.edu	TerpAI	Both	Campus-wide, plus separate Engineering instance	Jan 2025	ai-resources.umd.edu/resources/services/terpai
Maryland Global Campus	US	NR	umgc.edu	UMGC nebulaONE	Unstated	Portal live	2025–26	nebulaone.umgc.edu
North Carolina Chapel Hill	US	c. 60	unc.edu	BlueChip AI	Both (school, phased)	Kenan-Flagler Business School, with campus roadmap	Jun 2025	its.unc.edu/project/implementing-custom-ai-chatbots-nebulaone/

Short name	Country	Rank (THE 2026)	Domain	Local brand	Users	Scope	Announced	Verification URL
Oregon State	US	c. 301–350	oregonstate.edu	Assistant	Unstated	Portal live	2025–26	assistant.oregonstate.edu
Oxford	UK	1	ox.ac.uk	genai.ox.ac.uk	Both (pilot)	Central pilot to end of 2025–26 academic year	Nov 2025	oerc.ox.ac.uk/ai-centre/generative-ai-tools/nebulaone
Oxford Said Business School	UK	1 (Oxford)	sbs.ox.ac.uk	Saïd nebulaONE	Unstated	School-wide	2025	ai.sbs.ox.ac.uk
Penn State	US	c. 90	psu.edu	nebulaONE	Staff (training)	Staff training sessions; wider scope unconfirmed	2025–26	techpros.psu.edu/node/505
Prince Georges Community College	US	NR	pgcc.edu	–	Unstated	Vendor-named user	2025	gocloudforce.com (vendor)
Queen Mary London	UK	c. 145	qmul.ac.uk	POC NebulaOne	Unstated (POC)	Proof of concept	2025–26	poc-nebulaone.qmul.ac.uk
Surrey	UK	c. 201–250	surrey.ac.uk	My AI Surrey	Both	Campus-wide	Dec 2025	myai.surrey.ac.uk
Texas at Arlington	US	c. 601–800	uta.edu	nebulaONE POC	Teaching staff (pilot)	Faculty pilot, course-specific agents	Fall 2025	ai.uta.edu/nebulaone-at-uta
UCLA Anderson	US	18 (UCLA)	ucla.edu	Anderson GenAI agents	Both	School-wide, expanding across UCLA	2024	gocloudforce.com/uclacasestudy/ (vendor)
Western Ivey	CA	c. 201–250 (Western)	ivey.uwo.ca	nebulaONE	Both	School-wide; staff Feb 2026, students from 23 Feb 2026; Canadian first	Feb 2026	ivey.uwo.ca/news/news-ivey/2026/february/ivey-launches-nebulaone-to-support-the-future-of-experiential-business-learning/

Regional coverage and the unnamed remainder. The 27 named institutions split 14 US, 12 UK and 1 CA. Cloudforce states that nebulaONE is deployed across the US, Canada, UK, EU, Australia and New Zealand;[8] Canada is now confirmed by name (Ivey, February 2026, a self-described Canadian first for business education[9]), an Australian signal has been reported by the study lead but not yet traced to a verifiable URL, and no EU or New Zealand institution could be identified by name – targeted searches for Ireland, the Netherlands, Sweden and Denmark returned nothing. Three explanations are plausible and not mutually exclusive: deployments in those regions are recent and unannounced; they sit in the company's healthcare, schools and enterprise segments rather than universities; or institutions there deploy quietly – as the portal-only UK and US discoveries show, roughly half of all named deployments were never announced anywhere, the live portal being the only public evidence. The gap between 27 named institutions and the claimed 90+ is therefore mostly invisible-by-design, and closing it requires the fingerprint sweep to be run against comprehensive per-country university domain lists.

[8]Cloudforce. (2026, January 9). Cloudforce secures $10M Series A from Owl Ventures and Microsoft to democratize safe, equitable AI in education, healthcare, and beyond [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-secures-10m-series-a-from-owl-ventures-and-microsoft-to-democratize-safe-equitable-ai-in-education-healthcare-and-beyond-302656775.html

[9]Ivey Business School. (2026, February 4). Ivey launches nebulaONE® to support the future of experiential business learning. Retrieved from https://www.ivey.uwo.ca/news/news-ivey/2026/february/ivey-launches-nebulaone-to-support-the-future-of-experiential-business-learning/

Case Studies: Leading Deployments

The top-200 restriction on case studies is dropped per the revised brief; case studies below cover the deployments of greatest evidential or strategic interest, with ranks listed throughout the table above.

University of Oxford

Oxford is the most prestigious nebulaONE site and illustrates the platform's "second wave" adoption pattern: a professional school deployment followed by a central pilot. The platform was first deployed at Saïd Business School (live at ai.sbs.ox.ac.uk); the University's AI Competency Centre subsequently launched a central pilot at genai.ox.ac.uk, running to the end of the 2025–26 academic year, positioning nebulaONE as an enterprise gateway alongside an unusually plural toolset that already includes ChatGPT Edu, Google Gemini, NotebookLM and Microsoft Copilot Chat.[10] [11] Oxford's framing is notable: nebulaONE is valued as an agent-building platform – users can create tailored AI agents usable within and potentially beyond the University – hosted on Oxford's private Azure tenancy. Oxford's own guidance also flags a governance nuance worth recording: some models available through the gateway (Anthropic is named) may not yet be covered by full enterprise agreements – a reminder that an aggregator's compliance posture is per-model, not per-platform.[12]

The Russell Group Cluster: Manchester, Birmingham, Leeds and Queen Mary

The most significant new finding of the full sweep is a cluster of large research-intensive UK universities running nebulaONE with little or no publicity. Manchester lists NebulaONE as an approved tool in its staff AI Hub, described as "an AI toolbox built within UoM's cloud environment", and is onboarding early adopters across research, teaching and professional services.[13] Birmingham runs a campus "AI and agent platform" at ai.bham.ac.uk; Leeds and Manchester Metropolitan have live tenant portals; and Queen Mary maintains an explicitly labelled proof-of-concept instance. None of these was announced through press channels – all were found by portal fingerprinting – which suggests UK adoption is running well ahead of the press record, and that the Surrey and Lincoln announcements are the visible edge of a broader movement.

University of California, Los Angeles (Anderson School of Management)

UCLA Anderson was nebulaONE's proof-of-concept site and remains its flagship case study. Beginning in early 2024, Cloudforce delivered a custom GenAI chatbot for the MBA capstone project in 45 business days; an assignment that previously took students six hours can reportedly be completed in 10–15 minutes with the AI's assistance.[14] The school has since built agents for course registration support, essay feedback and careers administration serving its 40,000-strong alumni operation, and monthly active users grew by 485% between December 2024 and January 2025.[15]

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[10] University of Oxford AI Competency Centre. (2025). Piloting Cloudforce nebulaONE® AI platform. Retrieved from https://oerc.ox.ac.uk/ai-centre/ai-centre-news/piloting-cloudforce-nebulaone-ai-platform

[11] University of Oxford AI Competency Centre. (2026). nebulaONE. Retrieved from https://oerc.ox.ac.uk/ai-centre/generative-ai-tools/nebulaone

[12] University of Oxford AI Competency Centre. (2026). nebulaONE. Retrieved from https://oerc.ox.ac.uk/ai-centre/generative-ai-tools/nebulaone

[13] University of Manchester. (2026). Approved tools – AI Hub. Retrieved from https://www.staffnet.manchester.ac.uk/ai-hub/tools-and-resources/

[14] Cloudforce. (2025, June 25). UCLA Anderson School of Management deploys generative AI-powered chatbot to improve student outcomes with Cloudforce nebulaONE®. Retrieved from https://gocloudforce.com/uclacasestudy/

[15] Microsoft Education. (2025, April 17). Deploying AI platforms in higher education for improved outcomes. Retrieved from https://www.microsoft.com/en-us/education/blog/2025/04/how-microsoft-and-cloudforce-help-institutions-innovate-with-azure-ai/

The deployment has functioned as a blueprint drawing interest from across UCLA and other universities – most directly at UNC Chapel Hill, where ITS is implementing the Kenan-Flagler Business School's BlueChip AI instance (technical implementation completed June 2025, phased rollout from Fall 2025) with a roadmap for extending nebulaONE to other departments.[16] The business-school-first pattern now spans UCLA Anderson, LBS, Saïd, Surrey Business School, Kenan-Flagler, Cambridge Judge – whose CJBS.AI instance surfaced through a customer review[17] – and, from February 2026, Ivey Business School at Western University: the first named Canadian deployment, launched to faculty and staff with student access from 23 February, framed by Dean Julian Birkinshaw as an opportunity to lead rather than a disruption to manage.[18] Ivey's announcement also discloses a structure not previously documented: a nebulaONE Higher Education Advisory Council, on which Ivey sits alongside UCLA Anderson and LBS (Cambridge Judge references the same body as a Customer Advisory Board), giving flagship schools a voice in the product roadmap.[19] [20]

The Maryland System

Maryland's TerpAI is the largest and best-documented single-campus deployment in the pilot sample. Launched to faculty and staff in January 2025 and to all students at the start of the Spring 2025 semester, TerpAI is presented as the University's equity layer – accessible and affordable AI for a community of over 40,000 students.[21] The Division of IT has progressively expanded the platform: a September 2025 update added Canvas LMS integration (nebulaONE agents accessible directly inside Canvas courses) and "Connections" to live data services such as Jira and ServiceNow, with plans to expose more than 11,000 models including GPT-5.[22] [23] Maryland also illustrates the adoption challenge for campus-wide entitlements: as of September 2025, roughly 9% of the student body had used the tool.[24] TerpAI is approved for moderately sensitive (Level 2) institutional data – a direct pay-off of the private-tenancy architecture – and is supplemented by a separate Engineering instance.[25] Maryland is in fact nebulaONE's densest cluster: UMB lists NebulaOne in its AI toolkit as a centrally managed licence available on request,[26] and UMGC runs its own tenant portal. Cloudforce is itself Maryland-based, and the home-state system functions as its reference estate.

[16]University of North Carolina at Chapel Hill Information Technology Services. (2026). Implementing custom AI chatbots (nebulaONE). Retrieved from https://its.unc.edu/project/implementing-custom-ai-chatbots-nebulaone/

[17]G2. (2026). nebulaONE AI reviews. Retrieved from https://www.g2.com/products/nebulaone-ai/reviews

[18]Ivey Business School. (2026, February 4). Ivey launches nebulaONE® to support the future of experiential business learning. Retrieved from https://www.ivey.uwo.ca/news/news-ivey/2026/february/ivey-launches-nebulaone-to-support-the-future-of-experiential-business-learning/

[19]Ivey Business School. (2026, February 4). Ivey launches nebulaONE® to support the future of experiential business learning. Retrieved from https://www.ivey.uwo.ca/news/news-ivey/2026/february/ivey-launches-nebulaone-to-support-the-future-of-experiential-business-learning/

[20]G2. (2026). nebulaONE AI reviews. Retrieved from https://www.g2.com/products/nebulaone-ai/reviews

[21]University of Maryland Office of the President. (2025). AI at the University of Maryland. Retrieved from https://president.umd.edu/news/ai-at-the-university-of-maryland

[22]University of Maryland Division of Information Technology. (2025). TerpAI release notes. Retrieved from https://ai-resources.umd.edu/resources/available-services/terpai-release-notes

[23]The Diamondback. (2025, September 19). UMD TerpAI updates aim to boost campus adoption. Retrieved from https://dbknews.com/2025/09/19/umd-terpai-updates-aim-to-boost-campus-adoption/

[24]The Diamondback. (2025, September 19). UMD TerpAI updates aim to boost campus adoption. Retrieved from https://dbknews.com/2025/09/19/umd-terpai-updates-aim-to-boost-campus-adoption/

[25]University of Maryland Division of Information Technology. (2026). TerpAI. Retrieved from https://ai-resources.umd.edu/resources/services/terpai

[26]University of Maryland, Baltimore. (2026). NebulaOne – AI at UMB. Retrieved from https://www.umaryland.edu/ai/ai-toolkit/nebulaone.php

Case Western Reserve University

CWRU AI, launched by [U]Tech with Microsoft and Cloudforce in October 2024, demonstrates the multi-model value proposition in day-to-day use: the community selects among agents powered by OpenAI (including GPT-5 since late 2025), Anthropic's Claude Sonnet 4, Meta's Llama, Mistral, Codestral and DeepSeek R1, can analyse images, PDFs, Word and Excel files, and can deploy chatbots connected to departmental data sources.[27] [28] CWRU is a good example of a research-intensive top-200 institution using the aggregator model to give its community access both to frontier commercial models and to Chinese-origin open-weight models inside a compliant private tenancy – something no single-vendor enterprise product offers.

London Business School

LBS was among the earliest adopters alongside UCLA Anderson and Maryland.[29] Faculty involvement has been prominent – the school has publicly credited Cloudforce with collaborating to "shape a platform that supports how LBS learns, teaches and innovates".[30] Verification remains vendor-side only; obtaining an institutional source remains an open action.

Other Named Deployments

George Mason University launched PatriotAI in June 2025 as the first major outcome of its strategic partnership with Microsoft and Cloudforce – a suite of six specialised agents co-developed with the university community, within a wider "AI Innovation Nexus" strategy giving every student, staff and faculty member access to hundreds of models.[31]

Cal State Fullerton's TitanGPT provides secure, university-managed AI to students, faculty and staff under a custom brand from Spring 2025.[32]

The University of Surrey rolled out "My AI Surrey" to every student and staff member in December 2025 following a pilot in Surrey Business School and professional services, with student promotion from the start of semester two in February 2026.[33]

The University of Lincoln announced its deployment in October 2025 with staff and student rollout in November, layering nebulaONE on top of its self-built policy tool Newton and existing ChatGPT

[27] Microsoft Education. (2025, April 17). Deploying AI platforms in higher education for improved outcomes. Retrieved from https://www.microsoft.com/en-us/education/blog/2025/04/how-microsoft-and-cloudforce-help-institutions-innovate-with-azure-ai/

[28] Case Western Reserve University. (2025, November 4). Check out updates to CWRU's AI services. Retrieved from https://case.edu/news/check-out-updates-cwrus-ai-services

[29] Cloudforce. (2025, April 16). Cloudforce launches nebulaONE on Microsoft Azure: The leading AI gateway for higher education [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-launches-nebulaone-on-microsoft-azure-the-leading-ai-gateway-for-higher-education-302430687.html

[30] Cloudforce. (2025, March 12). Introducing nebulaONE®: The Azure-based enterprise GenAI platform powering innovation in education, healthcare, and beyond. Retrieved from https://gocloudforce.com/nebulaone-ai-launch/

[31] George Mason University Office of the President. (2025, June 4). Introducing PatriotAI: George Mason's new enterprise AI platform. Retrieved from https://president.gmu.edu/news/2025-06/introducing-patriotai-georges-masons-new-enterprise-ai-platform

[32] California State University, Fullerton Division of Information Technology. (2025). TitanGPT. Retrieved from https://www.fullerton.edu/it/projects/titangpt/

[33] University of Surrey. (2025, December 17). University of Surrey invests in personalised AI platform for staff and students delivered in partnership with Cloudforce and Microsoft. Retrieved from https://www.surrey.ac.uk/news/university-surrey-invests-personalised-ai-platform-staff-and-students-delivered-partnership

and Copilot provision, with an explicit pedagogic framing that AI should support learning rather than replace it.[34]

The University of Texas at Arlington is running a proof-of-concept from Fall 2025 specific to teaching staff, with more than 20 faculty building course-specific models customised with syllabi and lecture materials, ahead of planned Canvas integration.[35]

Penn State has run staff training on the platform, though the deployment's scope is unconfirmed.[36]

Oregon State, Cincinnati (Bearcat GPT), Florida Atlantic (OwlONE), Mary Washington (MaryWash AI), Derby and Huddersfield (ai.hud.ac.uk) all operate live tenant portals with no public announcement located – deployment confirmed by the portal itself.

Prince George's Community College is named by Cloudforce as a user.[37]

Observations on Costs

No public deployment discloses contract values, so cost reporting is necessarily qualitative. Three structural points can nonetheless be made.

First, nebulaONE's tariff is consumption-based with budgets and chargeback, explicitly avoiding per-user licensing;[38] this is the inverse of LMS-style tariffing and of ChatGPT Edu per-seat pricing, and means a university-wide entitlement with a long tail of light users carries a low marginal cost – a G2 reviewer from a university notes the consumption model suits the early stages of adoption, where a high-cost licence may not see usage matching the outlay.[39]

Second, Cloudforce markets onboarding with no up-front investment or commitment,[40] lowering the procurement barrier that stalls many enterprise AI deals.

Third, the Azure-tenancy architecture means model consumption is billed at Azure AI Foundry rates within the institution's existing Microsoft agreement, allowing universities to apply negotiated discounts and, in some cases, Azure credits. FOI/public-records requests to US public universities (Maryland, George Mason, Fullerton, UTA, Oregon State, Cincinnati, FAU, UNC) remain the route to actual spend figures.

[34]University of Lincoln Student Hub. (2025). Lincoln embarks on next phase of AI deployment with Microsoft and Cloudforce partnership. Retrieved from https://studentnews.lincoln.ac.uk/student-service/lincoln-embarks-on-next-phase-of-ai-deployment-with-microsoft-and-cloudforce-partnership/

[35]University of Texas at Arlington Office of Information Technology. (2025). nebulaONE at UTA. Retrieved from https://ai.uta.edu/nebulaone-at-uta

[36]Penn State IT Learning and Development. (2026). nebulaONE AI platform training. Retrieved from https://techpros.psu.edu/node/505

[37]Cloudforce. (2025, December 19). Cloudforce's nebulaONE® surpasses 3.3 million users as global expansion reaches three continents. Retrieved from https://gocloudforce.com/cloudforces-nebulaone-surpasses-3-3-million-users-as-global-expansion-reaches-three-continents/

[38]Cloudforce. (2025, March 12). Introducing nebulaONE®: The Azure-based enterprise GenAI platform powering innovation in education, healthcare, and beyond. Retrieved from https://gocloudforce.com/nebulaone-ai-launch/

[39]G2. (2026). nebulaONE AI reviews. Retrieved from https://www.g2.com/products/nebulaone-ai/reviews

[40]Cloudforce. (2025, April 16). Cloudforce launches nebulaONE on Microsoft Azure: The leading AI gateway for higher education [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-launches-nebulaone-on-microsoft-azure-the-leading-ai-gateway-for-higher-education-302430687.html

Appendix: nebulaONE Compared with Other Aggregators and Assistants

This appendix compares nebulaONE against (a) other aggregators used in leading universities, (b) the major single-vendor assistants now added for contrast (Claude for Education, ChatGPT Edu, Microsoft 365 Copilot, Google Gemini, Grok, Manus, Mistral Le Chat, Consensus), and (c) tools known to be widely used by students individually. On the last group, the Dropbox/Apple lesson applies: adoption of NotebookLM, DeepSeek, free-tier ChatGPT and Manus (via its Campus Pass) runs through students and small departments, not Central Purchasing, and a sweep that looked only at procurement announcements would miss it – as this sweep's portal-only discoveries confirm even at institutional level. NotebookLM and DeepSeek are therefore added as student-favourite comparators; the full sweep should instrument student-channel signals (Reddit, YouTube tutorials, campus newspapers) as the Manus report did.

Ratings are a desk assessment from public documentation as at August 2026 and should be treated as provisional pending hands-on testing. Key: Y – strong support; P – partial; N – weak or absent; n/a – not applicable (single-model products cannot rewrite prompts per model); ? – unverified. Features: F1 export to Markdown, Word, image and code formats; F2 ingestion of Word/PDF preserving structure and styles; F3 two-level Projects and Chats/Tasks; F4 top-level Settings/Skills projected into the underlying LLMs; F5 rewriting user prompts per underlying LLM; F6 consumption-based costs without high fixed per-seat fees.

Platform	Category	F1	F2	F3	F4	F5	F6
nebulaONE	Institutional aggregator	P?	P	P	P	N?	Y
Open WebUI / LibreChat	Institutional aggregator (open source)	P	P	P	P	N	Y
Custom portals (U-M GPT, Harvard AI Sandbox)	Institutional aggregator (in-house)	N	P	N	N	N	Y
OpenRouter (with front-ends)	Individual aggregator	P	N	P	P	N	Y
Poe	Individual aggregator	N	N	N	P	N	N
Perplexity	Individual aggregator / search	P	P	Y	N	P	N
Consensus	Individual research aggregator	P	P	N	N	P	N
ChatGPT Edu	Single vendor	Y	P	Y	P	n/a	N
Claude for Education	Single vendor	Y	P	Y	Y	n/a	N
Microsoft 365 Copilot	Single vendor	Y	Y	P	P	n/a	N
Google Gemini (Workspace for Education)	Single vendor	P	P	P	P	n/a	P
Grok (xAI)	Single vendor	P	P	N	P	n/a	N
Manus	Single vendor agent	Y	P	P	P	n/a	P
Mistral Le Chat	Single vendor	P	P	P	P	n/a	P
NotebookLM	Single vendor, student favourite	P	P	Y	P	n/a	P
DeepSeek	Single vendor, student favourite	N	P	N	N	n/a	Y

Feature-by-feature commentary

F1 – File export. Claude for Education sets the benchmark, producing genuine Word, PowerPoint, Excel and arbitrary code files; ChatGPT Edu follows via Canvas export to Word, PDF and code; Microsoft 365 Copilot exports natively across Office formats, and Manus delivers documents, slides and code as first-class outputs. A further differentiator now claimed for the frontier assistants – Word export carrying live MS Source Manager and Zotero citations, with footnotes and endnotes co-existing in one document, reportedly absent from Gemini, Mistral and Copilot – would, if it holds up under scale testing, widen the frontier-vendor lead on this feature; it is logged for systematic verification in a later phase. nebulaONE supports downloading generated content and code, but the range of export formats – particularly styled Word and multiple image and code formats – is not documented publicly and needs hands-on verification. Perplexity exports Pages to PDF, Word and Markdown; OpenRouter front-ends typically export Markdown only; Poe and DeepSeek are weakest.

F2 – Structure-preserving ingestion. No surveyed platform demonstrably meets the study's proposed Tier 2 benchmark (styles surfaced as attributes, per the Pandoc custom-style fenced-div convention adopted for the study's Defensive Markdown spec, ideally with round-trip back to styled Word); all extract text – and in better cases tables and images – for retrieval. Microsoft 365 Copilot is the partial exception: operating inside Word, it works on the styled document natively, though it is an editor rather than an ingester. nebulaONE analyses PDFs, Word and Excel files including charts and handwritten notes, per the CWRU and Maryland deployments,[41] [42] which places it at the better end of a universally partial field. This feature is a genuine market gap.

F3 – Two-level structure. ChatGPT's and Claude's Projects (instructions plus files plus chats), Perplexity's Spaces and NotebookLM's notebooks are the cleanest implementations. nebulaONE's organising unit is the agent – an agent carries knowledge sources and instructions, and users chat with it – which approximates project-level grouping but is not a user-facing Projects/Chats hierarchy in the same sense. Open WebUI offers folders and workspaces; Mistral's libraries and Manus's task sessions are partial; OpenRouter depends on the front-end used.

F4 – Top-level settings/skills projected into models. This is where aggregators should shine, since one configuration ought to apply across all underlying models. nebulaONE's agent instructions and knowledge sources do project across whichever model the agent uses – a real strength – but there is no documented equivalent of a reusable, composable Skills library at tenancy level. Among single-vendor products, Claude's Skills come closest to the ideal specified in the brief, but only within one vendor's models. None matches the brief's ideal of vendor-neutral top-level Skills.

F5 – Per-model prompt rewriting. Effectively absent across the market, and structurally impossible for single-vendor products (marked n/a). Perplexity and Consensus rewrite queries for retrieval purposes, which is adjacent but not the same. No aggregator surveyed advertises translating a user prompt into model-specific optimal phrasing – for example XML-tagged prompts for Claude or system-prompt conventions for Llama. Another genuine gap, and one an aggregator is uniquely positioned to fill.

F6 – Cost flexibility. nebulaONE's defining advantage: consumption billing through the institution's own Azure tenancy with budgets and chargeback, no per-seat fees, and onboarding without up-front

[41] Microsoft Education. (2025, April 17). Deploying AI platforms in higher education for improved outcomes. Retrieved from https://www.microsoft.com/en-us/education/blog/2025/04/how-microsoft-and-cloudforce-help-institutions-innovate-with-azure-ai/

[42] University of Maryland Division of Information Technology. (2026). TerpAI. Retrieved from https://ai-resources.umd.edu/resources/services/terpai

commitment.[43] [44] Open-source self-hosting, in-house portals and OpenRouter share the pay-per-token property but shift integration and support burden onto the institution or individual; DeepSeek is simply free at point of use, which is precisely why it spreads through students. Manus's credit-based tiers and the free-of-charge education tiers of Gemini and NotebookLM are partial. ChatGPT Edu, Claude for Education, Copilot, Poe, Perplexity, Grok and Le Chat enterprise are per-seat – the LMS-style tariffing the brief cautions against.

Appendix verdict

NebulaONE is the strongest institutional aggregator on governance and cost (F6, and deployment and compliance generally) and mid-field on user-facing productivity features (F1–F4), where the single-vendor products – especially Claude for Education and ChatGPT Edu – are currently ahead. The two features absent across the whole market – Tier 2 style-preserving ingestion (F2) and per-model prompt rewriting (F5) – are both features an aggregator is best placed to build. The scale of unannounced adoption found in this sweep strengthens the cost argument: the no-commitment consumption tariff appears to be exactly what lets universities stand up quiet, low-risk instances that per-seat products would price out.

Next Steps

1. Build the per-country university/domain lists (once-per-semester job) and re-run the "Instance of nebulaONE.ai" fingerprint sweep, the exclusion-chain series and the wildcard-pattern query against them, prioritising Ireland, the Netherlands, Scandinavia, Australia and New Zealand, to close the gap to the claimed 90+ institutions and to trace the reported Australian signal.

2. Verify the estimated THE rank placements and obtain institutional verification for LBS, UCLA Anderson and Prince George's Community College.

3. FOI/public-records requests to US public institutions for contract values.

4. Hands-on verification of appendix features on at least one live tenancy, scored against the Tier 1/2/3 ingestion benchmark, including the frontier-assistant citation-export claims (Source Manager/Zotero, footnotes plus endnotes) at scale.

5. Instrument some student-channel signals for bottom-up tools, per the Manus report method on how Manus often enters universities.

6. Re-run in early 2027.

[43] Cloudforce. (2025, March 12). Introducing nebulaONE®: The Azure-based enterprise GenAI platform powering innovation in education, healthcare, and beyond. Retrieved from https://gocloudforce.com/nebulaone-ai-launch/

[44] Cloudforce. (2025, April 16). Cloudforce launches nebulaONE on Microsoft Azure: The leading AI gateway for higher education [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/cloudforce-launches-nebulaone-on-microsoft-azure-the-leading-ai-gateway-for-higher-education-302430687.html