Global nebulaONE (Cloudforce) in Higher Education Sweep – November 2026 Update

26 November 2026 – 44 named institutions

Executive Summary

As of 26 November 2026 this study names 44 higher-education institutions (46 deployment rows) running Cloudforce's nebulaONE platform: 22 in the United States, 15 in the United Kingdom, 3 in New Zealand, 2 in the Netherlands, and 1 each in Canada and Spain.

The vendor claims more than 100 universities and over 4 million users across all segments, so roughly half the institutional estate remains unnamed. Seventeen institutions were added in a single day's enumeration (26 November), principally through certificate-transparency search – a human–LLM hybrid workflow documented in the Method section – following an autumn in which the vendor issued just one press release.

Four structural findings stand out.

- First, adoption is invisible by design: the consumption-based, no-commitment tariff lets institutions stand up instances with no procurement signal, and the Mary Washington life cycle (quiet portal found by fingerprint in August; formal campus-wide launch in October) shows portals precede announcements by about a year.
- Second, sector channels are driving the new wave: three of New Zealand's eight universities deployed within weeks via the CAUDIT procurement agreement, and the first EU instances include two Dutch universities of applied sciences.
- Third, the long-claimed academic-medical-centre category now has names – Johns Hopkins Health Plans, UCLA Health, Stanford Health Care and UT Southwestern.
- Fourth, the product is maturing toward features this study's appendix flagged as market gaps, notably a per-account Skills library documented at Imperial College London.

The default-hostname enumeration is now complete to formal exhaustion:

- Every nebulaONE-named tenant visible in certificate-transparency logs is in the table
- The unnamed remainder consists of branded-hostname tenants (requiring content-level search), non-university segments, and institutions not yet deployed.

Rows evidenced only by certificates await one-click portal verification, marked accordingly.

Scope and Background

This report updates the full global sweep of 21 August 2026 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. It identifies 44 named institutions (46 deployment rows) with per-row verification URLs – up from 27 in August – together with the first confirmed deployments in the EU (Spain and the Netherlands) and New Zealand, the traced Australian signal, and significant upgrades to existing rows.

Cloudforce's own claim has meanwhile risen from roughly 90 to more than 100 universities,[1] so the visibility gap persists and is discussed under Regional Coverage below.

Method

The August analytic instruments were re-run and extended. The lesson of this update is that product-string fingerprints multiply as a product matures: where August relied on one fingerprint (the portal page title "Instance of nebulaONE.ai"), November exploited three. The module brand "ONEChat" (spelt *OneChat* or *ONEchat* by some tenants) surfaced Imperial College London's dAIsy and Penn State's AI Studio; and the tenant login path `/auth/jwt/login`, shared by every nebulaONE instance, identified the University of Warwick's otherwise undocumented portal at ai.warwick.ac.uk. Future sweeps should harvest new product strings from each tenant's documentation as they appear (likely candidates observed this round: "Official Agents", "Personal Agents", "Personal Skills").

Three further instruments earned their place.

First, vendor award releases leak customer names through "logo walls": the November 2026 Microsoft Education Partner of the Year release carries a customer logo list naming Howard University, Stanford, the University of the District of Columbia and Virginia Tech alongside known deployments – Virginia Tech was confirmed within minutes, the others remain leads.[2]

Second, sector procurement portals now have value: the Australian signal reported by the study lead in August is traced to the CAUDIT procurement portal, where nebulaONE is listed for member institutions – a sector-wide route covering Australasian universities that explains how AU/NZ deployments can proceed with no institutional announcement at all.[3] The UK equivalents (APUC, LUPC, SUPC frameworks) and the US Internet2 community (which Cloudforce joined in July 2025) should be checked each round.

Third, certificate-transparency logs enumerate every TLS certificate issued for hostnames containing "nebulaone" – the purest residue search available, immune to search-engine operator mangling. The August-drafted recommendation of using crt.sh did not survive contact with reality: the service has been degraded for most of 2026 (its operator acknowledges a long-running rebuild of its 68 TB database, and both the web interface and the public PostgreSQL endpoint fail more often than they answer), and the Entrust, Google and Meta CT search tools have all closed.[4]

The latest working instrument is Merklemap (merklemap.com), a subdomain-search engine over the same logs, run by the study lead with the wildcard query *nebulaone*: its free preview – the twenty newest of 258 matches, a slice that happens to cover exactly the period since the August sweep – yielded three previously unknown university instances in one pass (Auckland, Inholland and Thomas More Hogeschool Rotterdam, below), plus a watch-list signal at a Dutch–Croatian IT services firm.[5]

---

[1]Cloudforce. (2026, November 11). Cloudforce wins 2026 Microsoft Education Partner of the Year, becoming the award's first back-to-back winner. Retrieved from https://gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/

[2]Cloudforce. (2026, November 11). Cloudforce wins 2026 Microsoft Education Partner of the Year, becoming the award's first back-to-back winner. Retrieved from https://gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/

[3]CAUDIT. (2026). Procurement portal: nebulaONE by Cloudforce. Retrieved from https://www.caudit.edu.au/procurement/portal/nebula-one/

[4]tuxxin. (2026, November). crt.sh down or 502? Certificate transparency search alternatives compared. DEV Community. Retrieved from https://dev.to/tuxxin/crtsh-alternatives-certificate-transparency-search-tools-compared-4ij5

[5]Merklemap. (2026). Subdomain search: *nebulaone* [Certificate-transparency search, free preview]. Retrieved 26 November 2026, from https://www.merklemap.com/

A targeted NZ follow-up by the study lead, *nebulaone*nz, immediately added Massey and Otago – demonstrating that the per-TLD variant of the wildcard (*nebulaone*ac.uk, *nebulaone*edu.au, *nebulaone*nl, and so on across the Commonwealth and OECD TLDs where likely universities congregate) is the systematic form of the instrument, and pairs naturally with the per-country university lists. The remaining 238 records are older than the free slice, so they largely cover already-known tenants, vendor web infrastructure (nebulaone.com, .dev) and commercial namesakes – for example nebulaone.io proved on inspection to be a hospitality software suite (NebulaPOS and NebulaCRS, by HTI), nothing to do with Cloudforce.

The UK re-run returned seven hostnames: one new (Liverpool, immediately corroborated by a student-facing university article),[6] one upgrade (a production host at Queen Mary alongside its proof-of-concept host), five known – and, as importantly, six known UK tenants absent, because their hosts are branded or generic (ai.bham, ai.hud, ai.warwick, myai.surrey, dAIsy, genai.ox). Only about a third of all known rows use the default nebulaone hostname, so the wildcard sees roughly a third of the "estate": null results (South Africa and Australia this round) mean no default-named tenant, not no tenant, and branded tenants need content-level instruments – a Shodan.io page-title search (http.title:"nebulaONE") or per-domain subdomain listings – rather than name-substring search.

The series was then completed across the remaining Commonwealth, OECD and Gulf TLDs in a single evening session: IE, SE, DK, FI, NO, CA, ZA, IN, AU, AE, QA, SA, KW and OM all null for academic tenants, amid instructive commercial false positives from substring matching (a US uniform-rental firm caught by "fi", an Indian property development caught by "in", and quality-assurance hosts caught by "qa" – one of which usefully revealed that Maryland operates a dedicated QA tier, nebulaone-qa.umd.edu, a marker of operational maturity).

The "th" residue, catching "health", delivered the academic-medical cluster described under Regional Coverage – at which point substring accidents were promoted to deliberate technique: common-substring probes (*nebulaone*health*, *nebulaone*-qa*, *nebulaone*.edu) join the kit.

The *nebulaone*.edu probe closed the evening with the session's largest haul: twenty hostnames, six new institutions in one page (Georgia Tech, Washington, Duke via its Clinical Research Institute – retrospectively explaining the June 2025 Duke datathon in the vendor's blog archive – Colorado Boulder, New Mexico and Fordham). The same page read as a maturity census, because hostname suffixes encode deployment stage: production, development and QA tiers at Penn State and Maryland (whose separate Engineering instance appears as nebulaone-eng), pilot-suffixed hosts at Washington and Colorado, a dev host at New Mexico. Future fingerprint passes should record the suffix on every host.

Two further refinements close the method account.

- First, the study lead's letter-partition insight: iterating *nebulaone*a*, *nebulaone*b*, and so on returns a different window of up to twenty rows onto the full 258-record result set each time, substantially reconstructing the subscription-gated remainder by query partition; the letter "a" pass alone mapped the vendor's own control plane on nebulaone.ai (api, license, deploy, subscribe, platform, a OneChat training host, and a host named for the company's Future Force internship programme).
- Second, the same pass surfaced the first private-training-provider signal – Makers, the London software-engineering bootcamp (nebulaone.makers.tech), consistent with its AI Academy programme – and an unidentified Austrian-TLD deployment (nebulaone.at, with

[6]University of Liverpool. (2026, November 3). Tech to make your uni life easier. Retrieved from https://news.liverpool.ac.uk/2026/11/03/tech-to-make-your-uni-life-easier/

staging and production tiers matching the equally unidentified nebulaone.co), both logged for the watch list. The CA null, despite Ivey's known deployment, is the designed control: a known tenant without a default hostname is invisible to the wildcard, confirming that nulls bound only the default-named estate.

The exclusion-chain series and wildcard-pattern query remain standard instruments for the human side, per the August division of labour between human and LLM; the vendor's press channel has been nearly silent since January 2026 (one award release in ten months), confirming that discovery now lives almost entirely in institutional and portal signals.[7]

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.[8] The platform was formally launched for higher education on Microsoft Azure in April 2025, although the earliest institutional deployment (UCLA Anderson School of Management) dates from mid-2024.[9]

Momentum has continued through 2026. In November 2026 Cloudforce was named Microsoft's Education Partner of the Year for the second consecutive year – the first company ever to win the award twice – with the release stating that more than 100 universities now use nebulaONE, up from roughly 90 at the January 2026 Series A.[10] [11] The release also quantifies maturity at the flagship site: UCLA Anderson reports over three dozen production agents, from two at launch.[12] Growth between the two award releases is corroborated by an August 2026 announcement that the company is doubling its National Harbor headquarters and adding 250 jobs, with the platform then supporting more than 4 million users globally – up from 3.3 million in December 2025.[13]

Two characteristics continue to distinguish nebulaONE from the enterprise offerings of the frontier labs.

[7] Cloudforce. (2026, November 11). Cloudforce wins 2026 Microsoft Education Partner of the Year, becoming the award's first back-to-back winner. Retrieved from https://gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/

[8] 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/

[9] 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

[10] Cloudforce. (2026, November 11). Cloudforce wins 2026 Microsoft Education Partner of the Year, becoming the award's first back-to-back winner. Retrieved from https://gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/

[11] 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

[12] Cloudforce. (2026, November 11). Cloudforce wins 2026 Microsoft Education Partner of the Year, becoming the award's first back-to-back winner. Retrieved from https://gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/

[13] Cloudforce. (2026, August 13). Frontier firm Cloudforce doubles National Harbor headquarters as agentic AI drives nebulaONE® growth [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/frontier-firm-cloudforce-doubles-national-harbor-headquarters-as-agentic-ai-drives-nebulaone-growth-302850771.html

- 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.[14]
- Second, consumption-based pricing: institutions pay for what they consume, with built-in budgets and chargeback reporting, avoiding per-user licensing fees[15] – "pricing based on actual usage rather than idle seats", as the 2026 award release puts it.[16] This makes an "AI for All" entitlement affordable even where most of the community are light users, and remains the structural reason quiet, no-announcement instances keep appearing.

[14]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

[15]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/

[16]Cloudforce. (2026, November 11). Cloudforce wins 2026 Microsoft Education Partner of the Year, becoming the award's first back-to-back winner. Retrieved from https://gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/

Summary of Confirmed Deployments

The table lists all named deployments, sorted alphabetically by short name (country codes: US, UK, CA, ES, NL, NZ). 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 Times Higher Education (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)". Rows new or materially changed since August are marked ▲. No institution has publicly disclosed contract values; all deployments use nebulaONE's consumption-based model billed through the institution's Azure tenancy.[17]

Short name	Country	Rank (THE 2026)	Domain	Local brand	Users	Scope	Announced	Verification URL
Auckland ▲	NZ	c. 152	auckland.ac.nz	–	Unstated	Portal live (CT first seen 5 Nov 2026)	2026	nebulaone.auckland.ac.nz
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
Colorado Boulder ▲	US	c. 140	colorado.edu	–	Unstated	Pilot host in CT logs	2026	nebulaone-pilot.colorado.edu
Derby	UK	c. 1001+	derby.ac.uk	–	Unstated	Portal live	2025–26	nebulaone.derby.ac.uk
Duke ▲	US	c. 28	duke.edu	–	Unstated	Clinical Research Institute instance; follows 2025 Duke–Cloudforce datathon	2026	nebulaone.dcri.duke.edu
Florida Atlantic	US	c. 601–800	fau.edu	OwlONE	Unstated	Portal live	2025–26	owlone.fau.edu
Fordham ▲	US	c. 601–800	fordham.edu	–	Unstated	Portal live (IT subdomain)	2026	nebulaone.it.fordham.edu

[17] 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
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
Georgia Tech ▲	US	c. 33	gatech.edu	–	Unstated	Portal live (OIT subdomain)	2026	nebulaone.oit.gatech.edu
Huddersfield	UK	c. 601–800	hud.ac.uk	nebulaOne	Unstated	Portal live	2025–26	ai.hud.ac.uk
IE University ▲	ES	NR	ie.edu	IE AI Engine	Unstated	Portal live; first named EU instance	2025–26	nebulaone.ie.edu
Imperial ▲	UK	c. 9	imperial.ac.uk	dAIsy	Both	Pilot; developer access staff-only	2026	imperial.ac.uk/admin-services/ict/training-and-resources/daisy/
Inholland ▲	NL	NR	inholland.nl	–	Unstated	Portal live (CT first seen 9 Oct 2026)	2026	nebulaone.inholland.nl
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/
Liverpool ▲	UK	c. 165	liverpool.ac.uk	–	Students confirmed	Campus provision, monthly token budgets	Nov 2026	news.liverpool.ac.uk/2026/11/03/tech-to-make-your-uni-life-easier/
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	NebulaOne	Both	Campus-wide, no individual cost, after near year-long pilot	Oct 2026	eagleeye.umw.edu/2026/10/15/secure-generative-ai-platform-nebulaone-is-now-available/
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
Massey ▲	NZ	c. 501–600	massey.ac.nz	–	Unstated	Portal in CT logs (Merklemap, Nov 2026)	2026	nebulaone.massey.ac.nz
New Mexico ▲	US	c. 501–600	unm.edu	–	Unstated	Production and dev hosts in CT logs	2026	nebulaone-ai.unm.edu

Short name	Country	Rank (THE 2026)	Domain	Local brand	Users	Scope	Announced	Verification URL
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/
Oregon State	US	c. 301–350	oregonstate.edu	Assistant	Unstated	Portal live	2025–26	assistant.oregonstate.edu
Otago ▲	NZ	c. 351–400	otago.ac.nz	–	Unstated	Portal live (indexed portal title)	2026	nebulaone.otago.ac.nz
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	AI Studio	Both (preview)	Branded platform; production, dev and QA hosts live	Apr 2026	tlt.psu.edu/tlt-event/ai-week-introduction-to-nebulaone/
Prince Georges Community College	US	NR	pgcc.edu	–	Unstated	Vendor-named user; officials quoted Nov 2026	2025	gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/ (vendor)
Queen Mary London	UK	c. 145	qmul.ac.uk	NebulaOne	Unstated	POC and production hosts in CT logs	2025–26	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
Thomas More Rotterdam ▲	NL	NR	thomasmorehs.nl	–	Unstated	Portal live (CT first seen 26 Oct 2026); not the Flemish Thomas More	2026	nebulaone.thomasmorehs.nl
UCLA Anderson	US	18 (UCLA)	ucla.edu	Anderson GenAI agents	Both	School-wide; 36+ production agents by Nov 2026	2024	gocloudforce.com/uclacasestudy/ (vendor)
UT Southwestern ▲	US	c. 151–200	utsouthwestern.edu	–	Unstated	Portal live (CT); academic medical centre, degree-granting	2026	nebulaone.utsouthwestern.edu
Virginia Tech ▲	US	c. 251–300	vt.edu	HokieAI	Both	Campus-wide; ONEChat plus API access	Aug 2026	news.vt.edu/notices/2026/08/it-hokieai-available.html
Warwick ▲	UK	c. 106	warwick.ac.uk	–	Unstated	Portal live (signature login path)	2026	ai.warwick.ac.uk/auth/jwt/login
Washington ▲	US	c. 26	uw.edu	–	Unstated	Pilot host in CT logs	2026	nebulaone-pilot.uw.edu
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 44 named institutions split 22 US, 15 UK, 1 CA, 1 ES, 2 NL and 3 NZ. The August EU gap is now closed twice over: IE University in Spain, and two Dutch institutions – Inholland and Thomas More Hogeschool Rotterdam, notably both hogescholen (universities of applied sciences), the first sign of nebulaONE reaching beyond the research-university sector in Europe.

New Zealand is confirmed at sector scale: Auckland (certificate first seen 5 November 2026), Massey and Otago make three of the country's eight universities, none announced – weeks after the Australian signal was traced to the sector layer, where nebulaONE is listed in the CAUDIT procurement portal, purchasable by Australasian member universities under a negotiated agreement.[18] The prediction that AU/NZ deployments would surface as quiet portals rather than announcements is validated three times over, and the NZ density strongly suggests the CAUDIT agreement is the vehicle.

Australia itself, Ireland, Scandinavia, South Africa and India remain unconfirmed by name (with the hostname caveat above: their per-TLD null hits exclude only default-named tenants); Croatia enters the watch list via a nebulaONE-named host at Devolvio, a Dutch–Croatian IT services firm, possibly a reseller channel. Against the vendor's current claim of 100+ universities,[19] roughly two-thirds remain unnamed; the award release's logo wall itself leaks untraced leads: Howard University (also named in a 2024 Cloudforce community post) and the University of the District of Columbia head the verification queue, while the Stanford lead is plausibly resolved by the academic-medical estate below. The August conclusion stands, strengthened: the no-commitment consumption tariff produces adoption that is invisible-by-design, and the gap closes only by enumeration instruments, not by waiting for press releases.

The academic-medical and non-academic estates. The same enumeration gives the vendor's long-claimed but never-named academic-medical-centre category four names: Johns Hopkins Health Plans (nebulaone.jhhc.com),[20] UCLA Health (nebulaone.uclahealth.org), Stanford Health Care (nebulaone.stanfordhealthcare.org) – which plausibly resolves the Stanford logo-wall lead: Stanford's presence on the award release may be its health system rather than the university – and UT Southwestern Medical Center, which as a degree-granting institution crosses into the main table.

UCLA thereby becomes a two-estate customer (Anderson and UCLA Health).

Beyond healthcare, the enumeration names DC Water, Host Hotels & Resorts and UniFirst, plus reseller demo instances at Omegabyte and Devolvio, and the first education-adjacent private provider: Makers, the London software-engineering bootcamp. These serve to calibrate the vendor's figures: the 4-million-user count spans all segments, so the higher-education share of the claimed 100+ institutions remains the relevant denominator for the coverage gap.

[18] CAUDIT. (2026). Procurement portal: nebulaONE by Cloudforce. Retrieved from https://www.caudit.edu.au/procurement/portal/nebula-one/

[19] Cloudforce. (2026, November 11). Cloudforce wins 2026 Microsoft Education Partner of the Year, becoming the award's first back-to-back winner. Retrieved from https://gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/

[20] Johns Hopkins Medicine. (2026). Johns Hopkins Health Plans: Rebrand information. Retrieved from https://www.hopkinsmedicine.org/johns-hopkins-health-plans/providers-physicians/resources-guidelines/provider-communications/rebrand-information

Case Studies: Leading Deployments

The August case studies (Oxford, the Russell Group cluster, UCLA Anderson, the Maryland system, Case Western Reserve, LBS) stand as published; this update adds the three materially new stories.

Imperial College London

Imperial's dAIsy ("Imperial's Generative AI Platform") is the most significant new find: a THE top-ten institution running a nebulaONE pilot open to both staff and students, with developer (shared-agent) rights reserved to staff.[21] Its documentation is unusually revealing about the product itself, naming the module set – ONEChat (cross-model conversations that keep history when switching between GPT, Claude and DeepSeek models), Official Agents, Personal Agents, and Personal Skills, reusable instruction sets of which each user may hold fifty.[22] The Skills feature is directly relevant to this study's appendix: it is the first documented step toward the top-level, vendor-neutral Skills layer the brief idealises, though it remains per-account rather than a tenancy-wide composable library. Artifacts are currently limited to one GPT agent, file uploads are capped at 16 MB (PDF, Word, Excel, CSV, images), and API access is not offered through dAIsy[23] – useful calibration points for appendix features F1, F2 and F4. With Imperial joining Oxford, Cambridge (Judge), Manchester, Birmingham, Leeds, Warwick and Queen Mary, nebulaONE now has a presence – mostly unannounced – across much of the upper Russell Group.

Virginia Tech

HokieAI (Hokie is the nickname of the VT sports team) launched campus-wide in August 2026 for students, faculty and staff. It is confirmed as built on the NebulaOne platform and the university's Azure AI infrastructure.[24] Two features distinguish it: it is the first documented tenant to expose API access alongside the ONEChat interface, with a published model menu (a GPT-5.4-to-GPT-6 family) and metered monthly usage;[25] and it has drawn the first mainstream-press scrutiny of a nebulaONE deployment, with regional coverage in October 2026 reporting "mixed reactions on campus":[26] a reminder that the elite-press channel the study treats as leads is beginning to carry reception evidence, not just launch news.

University of Mary Washington: the Quiet-Portal Life Cycle Completed

Mary Washington (UMW) is the first institution to traverse the full life cycle that this study has been tracking: an unannounced portal (found by fingerprint in August) that emerged from nearly a year of pilot programmes and testing into a formally announced, campus-wide service for all students, faculty and staff at no individual cost, on 15 October 2026.[27] The announcement names OneChat and Personal and Shared Agents, applies monthly usage caps with model upgrades on request, and – usefully for the coverage argument – itself names Oxford, UCLA, Maryland and George Mason as

[21] Imperial College London ICT. (2026). dAIsy – Imperial's generative AI platform. Retrieved from https://www.imperial.ac.uk/admin-services/ict/training-and-resources/daisy/

[22] Imperial College London ICT. (2026). dAIsy – Imperial's generative AI platform. Retrieved from https://www.imperial.ac.uk/admin-services/ict/training-and-resources/daisy/

[23] Imperial College London ICT. (2026). dAIsy – Imperial's generative AI platform. Retrieved from https://www.imperial.ac.uk/admin-services/ict/training-and-resources/daisy/

[24] Virginia Tech Division of Information Technology. (2026, August). Students, faculty, and staff gain access to HokieAI. Retrieved from https://news.vt.edu/notices/2026/08/it-hokieai-available.html

[25] Virginia Tech. (2026). HokieAI. Retrieved from https://ai.vt.edu/tools/hokieai.html

[26] WDBJ7. (2026, October 22). Virginia Tech's HokieAI platform draws mixed reactions on campus. Retrieved from https://www.wdbj7.com/2026/10/22/virginia-techs-hokieai-platform-draws-mixed-reactions-campus/

[27] University of Mary Washington. (2026, October 15). Secure AI platform NebulaOne is now available. EagleEye. Retrieved from https://eagleeye.umw.edu/2026/10/15/secure-generative-ai-platform-nebulaone-is-now-available/

peer deployments. UMW validates the study's central inference: quiet portals are pre-announcement deployments, not experiments, and the portal fingerprint finds them roughly a year early.

Observations on Costs

The August analysis stands; with one addition. The 2026 award release formalises the tariff contrast in Cloudforce's own words[28] – "pricing based on actual usage rather than idle seats" – and UMW's announcement shows what that buys at a small institution: a campus-wide entitlement with per-user monthly caps and escalation on request, at no individual cost.[29] The August 2026 expansion release goes further, claiming the delivered-value licensing model has cut institutional AI adoption costs by roughly an order of magnitude – a vendor figure, unverified, but directionally consistent with the adoption pattern this study observes.[30] An order of magnitude reduction in site-wide costs compared with enterprise licensing is bound to be, or at least seem, attractive. However, FOI/public-records requests (now extendable to Virginia Tech and UMW) remain the route to actual spending.

Appendix Note: Product Movement Since August

The August appendix ratings stand, with two adjustments flagged for the next full revision.

- F4 (top-level Settings/Skills projected into the underlying LLMs): nebulaONE now has a documented Personal Skills feature – fifty reusable instruction sets per account, applied across whichever models the user works with[31] – the first aggregator implementation of the brief's Skills ideal, though per-account rather than tenancy-level; the rating improves within P, and the trajectory (Skills shipped within a year of the feature being absent from all public documentation) suggests the gap the study identified is being closed.
- F1 (export): an Artifacts feature now exists but is limited to a single GPT agent at Imperial;[32] hands-on verification remains logged.
- The two market-wide gaps named in August – Tier 2 style-preserving ingestion (F2) and per-model prompt rewriting (F5) – remain unfilled on all public evidence.

Next Steps

1. Visit-verify the three CT-found portals (Auckland, Inholland, Thomas More Rotterdam – one click each) and the three logo-wall leads (Howard, Stanford, UDC); verify the estimated THE placements; obtain institutional verification for LBS, UCLA Anderson and PGCC.

2. The branded two-thirds of the estate needs content-level search. Shodan's monthly API tiers (from circa $69/month) are disproportionately high for a per-semester sweep; its one-off Membership tier, when offered (historically around US$49, frequently discounted), unlocks the

[28]Cloudforce. (2026, November 11). Cloudforce wins 2026 Microsoft Education Partner of the Year, becoming the award's first back-to-back winner. Retrieved from https://gocloudforce.com/cloudforce-wins-2026-microsoft-education-partner-of-the-year-becoming-the-awards-first-back-to-back-winner/

[29]University of Mary Washington. (2026, October 15). Secure AI platform NebulaOne is now available. EagleEye. Retrieved from https://eagleeye.umw.edu/2026/10/15/secure-generative-ai-platform-nebulaone-is-now-available/

[30]Cloudforce. (2026, August 13). Frontier firm Cloudforce doubles National Harbor headquarters as agentic AI drives nebulaONE® growth [Press release]. PR Newswire. Retrieved from https://www.prnewswire.com/news-releases/frontier-firm-cloudforce-doubles-national-harbor-headquarters-as-agentic-ai-drives-nebulaone-growth-302850771.html

[31]Imperial College London ICT. (2026). dAIsy – Imperial's generative AI platform. Retrieved from https://www.imperial.ac.uk/admin-services/ict/training-and-resources/daisy/

[32]Imperial College London ICT. (2026). dAIsy – Imperial's generative AI platform. Retrieved from https://www.imperial.ac.uk/admin-services/ict/training-and-resources/daisy/

http.title search filter, and Censys's free allowance (around 100 queries/month) is the no-cost alternative. Failing both, the branded estate remains reachable the slow way: per-domain subdomain listings run against the per-country university lists (the once-per-semester job, now due).

3. Check sector procurement portals each round: CAUDIT (AU/NZ) – now validated – APUC/LUPC/SUPC (UK), Internet2 (US), and SURF (NL) given the Dutch finds.

4. Ireland, Scandinavia and Australia proper remain open; watch the Devolvio (.hr) host as a possible reseller channel into the EU.

5. Hands-on verification of appendix features on a live tenancy – Imperial's unusually full documentation makes dAIsy the best-documented candidate – including the Personal Skills and Artifacts features and the frontier-assistant citation-export claims.

6. Re-run in early 2027 as the full-sweep refresh.