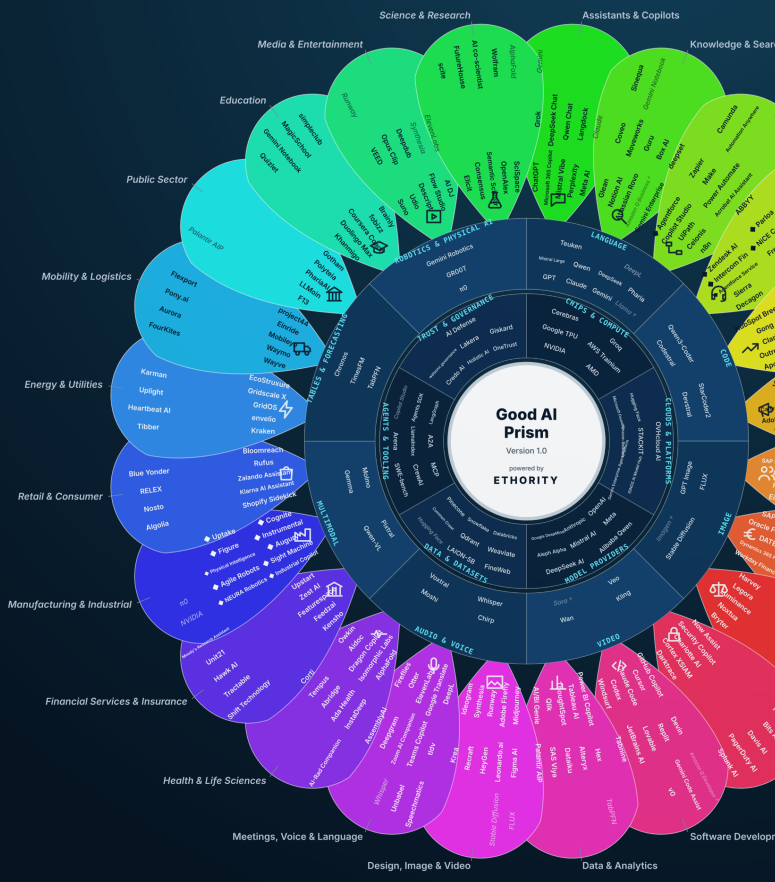
ETHORITY
AI BUSINESS OPERATING SYSTEM



GOOD AI PRISM · SECTOR BRIEF 2026/27 · EDUCATION · GLOBAL EDITION

Put AI to work for learners and teachers

Where AI already helps schools, universities and corporate learning, what the evidence shows, what the market offers, and the rules by jurisdiction.

24
AI offerings mapped in Education

1 in 3
lower-secondary teachers used AI in their work across OECD systems (TALIS 2024)

2 Dec 2027
EU high-risk duties for AI in admission, grading and exam proctoring apply

Created by Sten Franke with a people and governance lens by Severin L. Wilson · October 2026

AT A GLANCE

Education is where AI meets the next generation

Students adopted AI first; teachers are catching up fast. The evidence is now clear on one point: AI designed for teaching raises learning, while unguided use can weaken it.

This brief applies the Good AI Prism Market Study 2026/27 to education, from schools and universities to corporate learning. It combines the study's market map of 24 AI offerings with current research on adoption, learning effects, teachers and rules across major jurisdictions. Europe is ETHORITY's hub market and Germany its home and test market, so both get the closest look. The brief ends with the questions to settle before a pilot and with how ETHORITY helps.

52%
of German teachers use AI for work several times a month or more, up from under a third (Schulbarometer 2026)

84%
of German 12- to 19-year-olds have used ChatGPT; 74% use AI for homework (JIM 2025)

95%
of UK undergraduates use AI; 94% for assessed work (HEPI, 2026)

54%
of US teens have used chatbots for schoolwork (Pew, Feb 2026)

44m
teachers needed worldwide by 2030 (UNESCO)

+0.31 SD
learning gain from six weeks of guided GPT-4 tutoring in Nigeria, about 1.5–2 years of schooling (World Bank, 2025)

About this brief

Market figures come from the Good AI Prism 2026/27 study dataset: every entry is recorded with a dated source from the provider's own pages. Job groups are ETHORITY's classification. External figures name their source, population and date; surveys are labelled. This brief is not legal advice.

WHERE EDUCATION STANDS

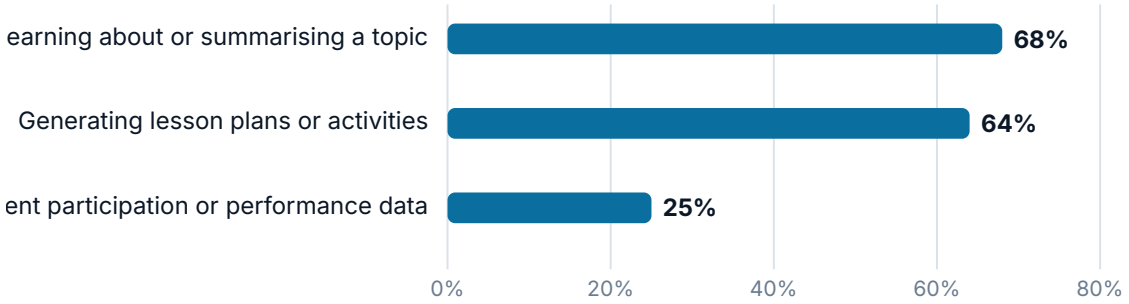
Students first, teachers fast behind

Around one in three lower-secondary teachers used AI in their work across OECD systems in 2024, from about three in four in Singapore and the UAE to 14% in France (TALIS). In Germany the share of teachers using AI several times a month rose from under a third to 52% within a year (Schulbarometer 2026). Students are further ahead: 95% of UK undergraduates and 84% of German teenagers use AI.

Design decides the effect. Guided AI tutors raised learning in Nigeria by 0.31 standard deviations in six weeks and more than doubled gains in a Harvard physics course; plain GPT-4 without guardrails left Turkish students 17% worse on a later exam (PNAS, 2025). The OECD reaches the same conclusion: tools built for teaching work better than general chatbots.

Exhibit 1 · What teachers use AI for

Share of AI-using lower-secondary teachers by task, OECD average



OECD, Results from TALIS 2024, Oct 2025 · about 280,000 teachers in 55 systems

THE WORKFORCE SIDE

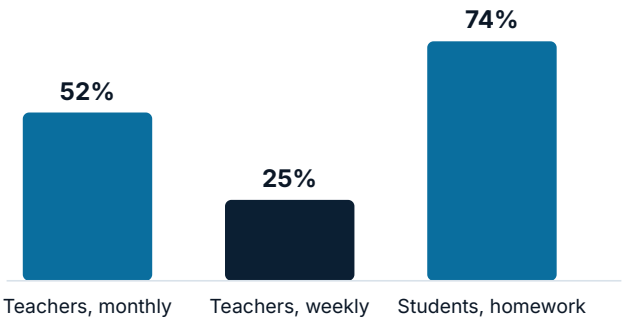
AI arrives in a profession under pressure

The world needs 44 million more teachers by 2030 (UNESCO), and a quarter of teachers in OECD systems work in schools where shortages limit teaching (TALIS). In Germany the education ministers project a gap of about 49,000 teachers to 2035, concentrated in lower secondary and vocational schools.

Skills are the main barrier: three in four teachers who do not use AI cite a lack of knowledge, and 52% of German teachers say they need training. Teachers are cautious: two thirds expect negative effects on critical thinking, while 59% see benefits for individual support (Schulbarometer 2026).

Exhibit 2 · Test market Germany: AI in schools

Share using AI: teachers at least monthly or weekly (2026); students aged 12–19 for homework (2025)



Deutsches Schulbarometer 2026 (1,547 teachers); JIM-Studie 2025 (1,200 young people) · surveys

49,000

teachers missing in Germany to 2035 in the education ministers' projection (KMK, Feb 2025)

52%

of German teachers say they need training in AI (Schulbarometer 2026)

THE RULES

Europe sets the reference dates

ETHORITY reads the rules by jurisdiction. Europe is the hub market: the AI Act bans emotion recognition in schools and treats AI in admission, grading, steering learning and proctoring as high-risk. Germany, the home and test market, adds a joint recommendation of the Länder, the DigitalPakt 2.0 and a shared AI chatbot for schools.

European Union: the hub market

2 Feb 2025	IN FORCE	Emotion recognition is banned in education institutions; providers and deployers take measures to support AI literacy (Art. 4, as amended).
2 Aug 2026	IN FORCE	Transparency: learners must be told when they interact with an AI system (Art. 50).
2 Dec 2026	MARKING	Machine-readable marking of AI-generated content required for systems placed on the market before Aug 2026.
2 Dec 2027	ANNEX III	High-risk: admission and assignment to institutions, evaluating learning outcomes including steering learning, deciding the level of education, and proctoring (point 3).

Dates as amended by the Digital Omnibus on AI, Regulation (EU) 2026/1744, in force since 27 July 2026.

Germany, the home and test market, adds its own building blocks

- Recommendation of the education ministers on AI in schools (Oct 2024): learning, assessment, teacher training, regulation and equal access.
- DigitalPakt 2.0: €5 billion from the federal government and the Länder, starting 1 Sep 2026, with AI focused on teacher training.
- AIS.chat (formerly telli): a shared AI chatbot for schools run by FWU for all 16 Länder, hosted in the EU, with data not used for training.

RULES BY JURISDICTION

Where you teach decides which rules apply

Rules for AI in education range from the EU's risk-based law to national curricula and ministry guidance. Status October 2026.

JURISDICTION	INSTRUMENT	APPLIES	WHAT IT MEANS FOR EDUCATION
European Union	AI Act as amended	Emotion-recognition ban since Feb 2025; Annex III from 2 Dec 2027	Admission, grading, steering learning and proctoring are high-risk; AI literacy measures expected.
Germany	KMK recommendation; DigitalPakt 2.0; AIS.chat	Since 2024; DigitalPakt from Sep 2026	Common principles of the Länder, €5bn for digital education, a shared EU-hosted chatbot for schools.
United Kingdom	DfE generative AI product safety standards; Ofqual	Standards updated Jan 2026; Ofqual letter Mar 2026	Safety expectations for AI products in schools, including safeguarding; exam boards to strengthen detection of AI misuse.
United States	EO 14277; Department of Education guidance	Since Apr and Jul 2025	National push for AI education; federal grant funds may support AI tools and tutoring.
China	Ministry of Education guidelines; Beijing AI lessons	From autumn 2025	AI general education in schools; Beijing requires at least eight AI class hours a year.
Japan	MEXT guidelines on generative AI in schools, version 2.0	Since Dec 2024	Guidance for use in primary and secondary education.
South Korea	Elementary and Secondary Education Act amendment	Aug 2025	AI digital textbooks reclassified from textbooks to optional learning materials.
Australia	Australian Framework for Generative AI in Schools	Since 2024	National principles for safe and effective use in schools.
United Arab Emirates	AI curriculum in public schools	From 2025–26	AI taught from kindergarten to grade 12; about three in four teachers use AI (TALIS).

Sources: statutes, ministries and regulators (EU, KMK, BMBFSFJ, FWU, DfE, Ofqual, US Department of Education, MEXT, Korean Ministry of Education, Beijing Education Commission, Australian Education Ministers, UAE Ministry of Education). Status October 2026. Not legal advice.

Where the 24 providers are headquartered

12
Europe, of which 5 in Germany

11
North America

1
Australia

Headquarters as of October 2026 from provider pages and public sources. Workday owns Sana; Turnitin owns Gradescope; Jisc owns TeacherMatic; Google provides NotebookLM. AIS.chat is run by FWU for the German Länder.

THE MARKET MAP

24 AI offerings for learning, from the classroom to the company academy

The Good AI Prism 2026/27 places 24 offerings in Education. Seven serve corporate learning and course creation. Six help teachers prepare lessons and materials, and six tutor students directly. Three are course, language and study tools, and two support assessment and quizzes.

Exhibit 3 · The Education map by job

Number of offerings per job group; names alphabetical, not a ranking

7 Corporate learning & course creation

360Learning AI Content Builder · Area9 Rhapsode · Coursebox · CYPHER Agent · Docebo Harmony · Sana Learn (Workday) · Speexx Talk

Annex III 3 covers vocational training; Annex III 4 if results feed promotion or termination decisions

6 Teacher assistants & lesson preparation

Brisk Teaching · Eduaide · fobizz · MagicSchool · TeacherMatic · to-teach (thea)

Minimal risk for preparation; high-risk under Annex III 3(b) if it grades or steers learning

6 Tutoring & student learning

AIS.chat (formerly telli) · Brainly · Khanmigo (Khan Academy) · Quizlet · simpleclub · Skye (Third Space Learning)

Art. 50 disclosure; Annex III 3(b) when it evaluates outcomes or steers the learning process

3 Courses, languages & study tools

Coursera Coach · Duolingo Max · NotebookLM (Google)

Art. 50 disclosure; Annex III 3 only for the listed uses

2 Assessment & quizzes

Gradescope (Turnitin) · Kahoot! AI tools

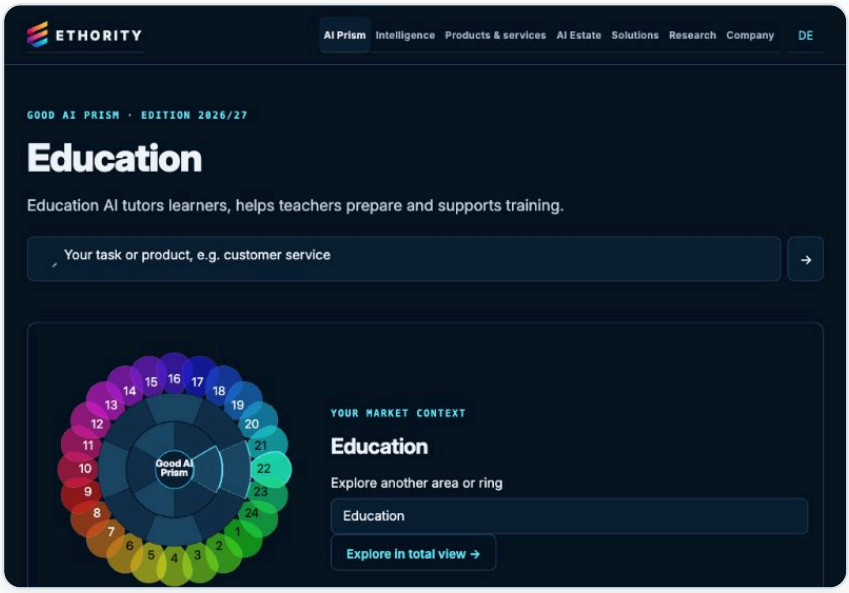
High-risk under Annex III 3(b) when it evaluates learning outcomes

Good AI Prism 2026/27 study dataset · job groups: ETHORITY classification · The AI Act classifies uses, not products. Whether an offering is high-risk depends on its intended purpose in the institution.

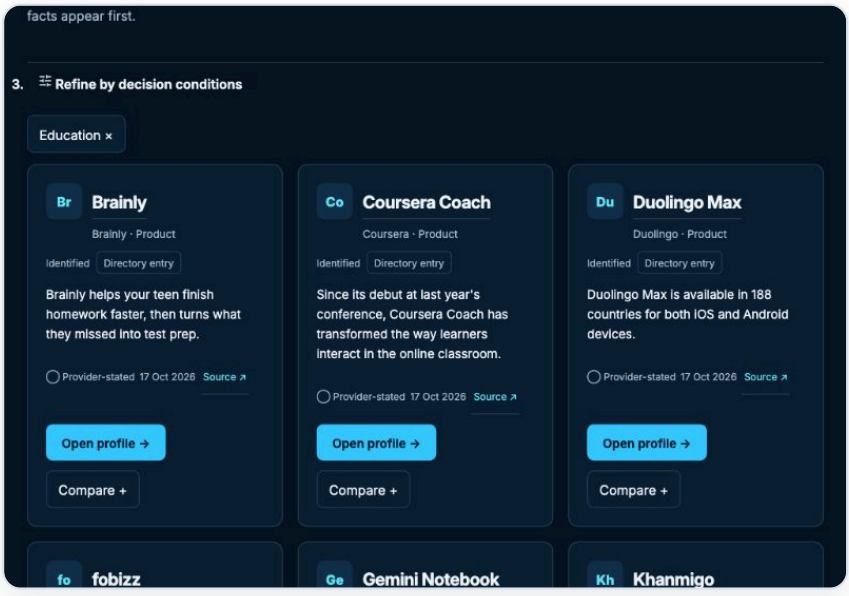
ONLINE VIEW

The Education area in the Good AI Prism

The online Good AI Prism places each offering in its business area and shows the source and date behind every entry. The preview below shows the Education area as it appears in October 2026. Select an area to see the offerings placed there, then open a profile to check the provider's own statement, its date and the decision facts recorded for it, such as pricing basis, data hosting and training on customer data where documented.



Good AI Prism online preview: Education selected, October 2026.



Entries with their source and date. This brief counts all 24 entries recorded for the edition.

NEEDS AND DECISIONS

What education leaders need, and what to ask before a pilot

What the evidence shows

Skills
Three in four teachers who do not use AI cite lack of skills; 52% of German teachers want training.

Students
68% of UK undergraduates call AI skills essential; 48% say staff help them build them (HEPI, 2026).

Integrity
65% of UK students say assessment has changed because of AI; England's exam regulator asked exam boards to act (Mar 2026).

Design
Guided tutors raise learning; unguided chatbots can lower later exam results (PNAS, 2025; OECD, 2026).

Seven questions before AI touches learning or grades

1. Does it admit, grade, steer learning or proctor exams? Then it is high-risk in the EU from Dec 2027.
2. Is it designed for learning, with guardrails, or a general chatbot?
3. Which evidence of learning gains exists for our learners and age group?
4. Where are pupils' data stored, is it used for training, and are parents informed?
5. Do learners know when they deal with AI, and can a teacher review every grade?
6. Are teachers trained, and is AI literacy documented?
7. Which measures decide scaling: learning gains, teacher time, equity and wellbeing?

WORKFORCE PLAN

Plan the people side with the technology

When agendas change quickly, the people side breaks first: half-adopted tools, skills that lag the system, employees who were not involved, and decisions no one owns. Plan adoption, training, employee participation and accountable oversight as part of every staged commitment, not after it.

Severin L. Wilson, workforce lens in the Good AI Prism Market Study 2026/27

Workforce annex to the pilot charter

Affected roles	Which teachers, trainers and support staff the pilot touches, and how many
Baseline workload	Preparation, marking and administration time today, measured before the pilot
Skills needed	Using, reviewing and explaining AI; training plan and owner
Involvement	Staff councils, school leadership, parents and learner representatives
Oversight owner	The named teacher or trainer accountable for grades and learning decisions
Escalation and appeal	How learners and parents can challenge an AI-supported result
Capacity plan	Where returned time goes: individual support, feedback or professional learning; who decides
Measured quality	Learning gains, equity, errors and wellbeing, tracked with the outcome measure

Saved time is not realised value. Count it when returned time has demonstrably gone into learning.

NEXT STEPS

A 90-day start for schools, universities and academies

01
Inventory
List every AI tool in use, including those teachers and students bring themselves.

02
Classify
Separate preparation and tutoring from grading, admission and proctoring; map each to the rules.

03
Involve
Bring in staff councils, data protection, parents and learners early.

04
Enable
Train teachers and document AI literacy measures.

05
Pilot
Run one guided tutoring or preparation use with a baseline and the workforce annex.

06
Decide
Scale only on measured learning gains, teacher time and equity.

ETHORITY recommendation, derived from the rules and evidence in this brief.

CONCLUSIONS

What the evidence adds up to

AI is already in every classroom through students' phones. The task for institutions is to make it improve learning. Five conclusions for decisions now.

1 **Choose tools built for learning**

Evidence. Guided AI tutors raised learning; unguided chatbots lowered later exam results by 17%.

What to do. Prefer tools with pedagogical guardrails and evidence over general chatbots. · Where education stands

2 **Train teachers first**

Evidence. Three in four non-users cite lack of skills; 52% of German teachers want training.

What to do. Make AI literacy part of every pilot, funded through programmes such as DigitalPakt 2.0. · The workforce side

3 **Keep grades human**

Evidence. Grading, admission, steering learning and proctoring become high-risk in the EU from Dec 2027.

What to do. Let AI prepare and support; keep a teacher accountable for every grade. · The rules

4 **Redesign assessment**

Evidence. 94% of UK undergraduates use AI for assessed work; exam regulators ask for action.

What to do. Adapt assignments and exams to a world where AI is always available. · Needs and decisions

5 **Use shared, protected platforms**

Evidence. Germany's 16 Länder share one EU-hosted chatbot with no training on pupils' data.

What to do. Use shared platforms with clear data rules before buying individual tools. · Germany adds its own building blocks

THE PROBLEM

Education is not short of AI tools. It is short of evidence, skills and time.

Schools, universities and company academies must choose AI that improves learning, protect learners' data and rights, and prepare teachers who are already stretched.

THE PROBLEM	WHAT WE SEE IN THE EVIDENCE	WHAT IT COSTS
Uneven evidence	Few tools show learning gains; general chatbots can weaken learning.	**Money spent on tools that do not help learners.**
Skills gap	Most teachers have had little or no AI training.	**Uneven use and growing inequality.**
Assessment under pressure	AI can complete many traditional assignments.	**Grades lose meaning; integrity disputes.**
Data and child protection	Pupils' data, consent and safeguarding rules apply.	**Legal risk and loss of parents' trust.**
Fragmented procurement	Schools, districts and states buy separately.	**Duplicated cost and weak bargaining power.**

The question behind every project

What should improve, which options are credible, what evidence is missing, what implementation requires, and who owns the outcome?

HOW ETHORITY HELPS

From AI ambition to better learning

ETHORITY helps education providers choose, govern and prove AI: from independent market evidence to decisions that can be defended to parents and regulators, and outcomes measured in learning.

01
Discover
Find and qualify the opportunity: options, evidence, constraints and rules.

02
Create
Design and build the solution with your data, systems and people.

03
Run
Operate it responsibly, with owners, controls and support.

04
Improve
Measure against the objective and adjust.

05
Grow
Turn what was learned into new capability and value.

WHERE A PROJECT CAN BEGIN

AI opportunity case
One use, such as guided tutoring, lesson preparation or course creation, assessed against evidence, cost and rules, ending in a decision: pilot, redesign, expand or stop.

Market and evidence review
Good AI Prism research profiles and comparisons of the 24 offerings, with a structured check of learning evidence and data terms.

AI estate audit
An inventory of AI tools in use across schools, faculties or academies, including those staff and learners bring themselves.

Governance and AI Act readiness
Each use mapped to the AI Act, data protection and child-safety rules, with proportionate controls.

AI literacy for teachers and trainers
Role-based training for teachers, trainers and leaders, with named accountability for grades and learning decisions.

From pilot to operation
A pilot charter with baseline, threshold and stop conditions, then building and running the solution on ETHORITY's AI Business Operating System.

Who we work with

School authorities and school groups, universities, vocational schools, corporate academies, education ministries and EdTech providers.

Start with one question. Talk to us: sten@ethority.ai · severin@ethority.ai · ethority.ai/ai-prism-study

ABOUT ETHORITY

From understanding markets to building AI capability

ETHORITY connects market intelligence, research and practical delivery to help organisations put AI to work. It is built as an AI1st organisation: humans and AI agents work on one AI Business Operating System, with the research, engineering and operations to build and run AI after the pilot. Its roots lie in the digital intelligence business Sten Franke founded in 2005, which combined monitoring, research and advisory work to help organisations understand changing markets.

The Good AI Prism is the entry point: research profiles, documented relationships and comparisons help users investigate their options. Advisory, governance and transformation work connect those options with an organisation's objectives, data, systems, people and operating conditions.

SELECTED REFERENCES AND PARTNERS SINCE 2005

Bosch · Bayer · BMW · Siemens · Mercedes-Benz · Coca-Cola · Deutsche Bank · T-Mobile · Telefónica o2 · DHL · EDEKA · AIDA Cruises

Selected historical references and partners from the group's market-intelligence and advisory heritage, in projects or through former group companies.

METHOD

Market figures: Good AI Prism 2026/27 study dataset, Education area, 24 entries, each with a dated source from the provider's own pages (October 2026). Job groups and AI Act relevance: ETHORITY classification by intended use. Jurisdictions: status October 2026. External figures as cited; surveys labelled and not combined. Not legal advice.

MAIN SOURCES

- OECD, Results from TALIS 2024, Oct 2025; OECD, Digital Education Outlook 2026
- Robert Bosch Stiftung, Deutsches Schulbarometer 2026 (forsa, n = 1,547), 23 Jun 2026; mpfs, JIM-Studie 2025
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- De Simone et al., World Bank WP 11125 (2025); Kestin et al., Scientific Reports 15:17458 (2025); Wang et al., Tutor CoPilot (2025); Bastani et al., PNAS 122(26) (2025)
- Regulation (EU) 2024/1689 (AI Act), Art. 4, 5(1)(f), 50 and Annex III point 3; Regulation (EU) 2026/1744
- KMK recommendation on AI in schools, 10 Oct 2024; BMBFSFJ, DigitalPakt 2.0, 19 Aug 2026; FWU (telli / AIS.chat), 2025–2026
- Ofqual letter to exam boards, 2 Mar 2026; EO 14277 (Apr 2025); US Department of Education AI guidance, Jul 2025
- Good AI Prism Market Study 2026/27 and study dataset (ETHORITY, October 2026)

ETHORITY
AI BUSINESS OPERATING SYSTEM



FROM BUSINESS AMBITION TO AI THAT WORKS

Put AI to work, with evidence.

ETHORITY helps organisations choose, govern and prove AI: from independent market evidence to decisions that can be defended and outcomes that can be measured.

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STUDY REPOSITORY AND UPDATES

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THE ETHORITY STUDY SUITE

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06	**The Social Media Prisma 2009–2025**	Historic paper · EN and DE

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