

BRIEF 07 OF 07 · BEFORE YOU RENEW

Our Forecast Record

In June our research team set five forecasts and committed to grading them before publishing anything. Here is the record, including the miss, and what we expect next.

2

forecasts borne out

2

partly borne out, one with the
headline date wrong

1

too early to tell, and labeled that
way

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PART SIX

The Record on Our Forecasts

In June, our research team set five forecasts in an internal edition that was never distributed, and committed to grading them here before this series published anything. Each is reported below with the evidence that bears on it and a plain verdict. One was wrong in a way that matters, and it is treated first.

Forecast one: artificial intelligence governance moves from voluntary to mandatory

We wrote that the European Union Artificial Intelligence Act would reach broad application on August 2, 2026, and that its transparency and enforcement provisions would begin to shape vendor documentation and contract terms reaching United States institutions.

Partially borne out, and the headline date was wrong. Regulation (EU) 2026/1744, adopted July 8, 2026 and in force from July 27, moved the high risk obligations for stand alone Annex III systems, which include education, to December 2, 2027, and those for product embedded Annex I systems to August 2, 2028 (European Commission, 2026a).

The Article 50 transparency obligations did begin applying on August 2, 2026 as we said, with a grace period to December 2, 2026 for certain marking requirements (European Commission, 2026b). The second half of the forecast held. The first half did not, and institutions that scheduled compliance work against August 2026 have more time than the original date implied.

Forecast two: accessibility work continues despite the deadline extension

We wrote that institutions prepared for the original April 2026 accessibility deadline would proceed, and that accessibility provisions would appear with growing frequency in solicitations well before the extended deadline.

Borne out. The Department of Justice Interim Final Rule extending compliance dates was published at 91 Federal Register 20902 on April 20, 2026, moving entities serving populations of 50,000 or more to April 26, 2027 and smaller entities and special districts to April 26, 2028 (U.S. Department of Justice, 2026). The technical standard was not changed.

No final rule has been issued since, and the comment period closed on June 22, 2026. A parallel extension on the same pattern was issued by the Department of Health and Human Services for Section 504 web accessibility obligations. The substantive obligation remains intact and now lands in April 2027.

Forecast three: enterprise software renewals remain a source of volatility

We wrote that subscription transitions and bundle consolidation would continue to produce renewal increases.

Borne out in substance, with a documentation caveat we owe you. Microsoft implemented commercial pricing increases effective July 1, 2026 across several Microsoft 365 and Office 365 tiers, alongside repackaging that added bundled components to the same stock keeping units (Microsoft, 2026). The Broadcom VMware situation escalated to a formal competition complaint filed with the European Commission in March 2026 (CISPE, 2026).

The mechanism we named is real and evidenced. What we could not find, and will not manufacture, is credible published data quantifying these increases at higher education institutions specifically. Institutions seeking a campus benchmark should rely on their own renewal history and on peer exchange rather than on any published figure, because no reliable one exists.

Forecast four: facilities backlogs will not stabilize without deliberate reinvestment

We wrote that on current investment levels, deferred renewal would continue to grow.

Too early to tell, and we should have said so when we made it. No facilities benchmarking dataset has appeared between June 2026 and today that bears on the question. The APPA Facilities Performance Indicators survey for 2026 opens in the autumn with publication expected in spring 2027, and Gordian's fourteenth edition will follow its usual annual cycle. The April 2026 data is directionally consistent with the forecast, but it predates the forecast and cannot confirm it. This is a forecast still running rather than one validated, and we will report on it when the underlying instruments publish.

Forecast five: student health demand stays elevated even as symptoms ease

We wrote that demand would remain elevated, with continued reliance on telehealth and blended models, and that the governance of those models rather than their availability would be the decisive variable.

Partially borne out. The American College Health Association published its Spring 2026 National College Health Assessment reference group results in August 2026, covering 57,211 students at 86 institutions, reporting 45.4 percent screening positive for loneliness and substantial service utilization (American College Health Association, 2026).

The demand half of the forecast is supported. The telehealth half is not, because no national dataset published since June 2026 measures telehealth or blended delivery utilization in campus mental health services, and we will not assert it without one. The Healthy Minds national report for 2025 to 2026, which we named as our forward test, has not yet appeared. Federal funding held steady rather than contracting, which removes one downside risk the forecast implicitly carried.

WHAT WE ARE CHANGING AS A RESULT

Two practices follow from this review. First, where a forecast depends on a statutory date that is subject to amendment, we will say so at the time of publication rather than printing the date unqualified. Second, where no measuring instrument is scheduled to publish within the forecast window, we will label the forecast as one that cannot be tested in the next edition, rather than carrying it forward as though it could.

Looking Ahead

What the next quarter is likely to bring

- **The producer price divergence will show up in renewal requests.** Suppliers absorbing goods and services inflation through 2026 will seek recovery at anniversary dates, and the justifications offered will cite inflation without specifying which measure. This is testable: we will report next edition on what members observed in their own renewal correspondence.
- **Artificial intelligence governance activity will shift from policy drafting to procurement practice.** With federal requirements expressly devolved to institutions and the European high risk obligations deferred to December 2027, the near term action is contractual rather than regulatory. We expect the share of institutions with an artificial intelligence specific procurement step to rise from the roughly half recorded in 2025.
- **Building performance compliance will produce its first visible enforcement in the education sector.** New York City has completed a compliance reporting cycle and has indicated further compliance data will be published. Washington State passed its first Tier 1 deadline in June. We expect at least one publicly reported institutional penalty or enforcement action within the next two quarters.
- **Facilities benchmarking will not be testable until spring.** APPA collects its 2026 indicators beginning this autumn. We flag this deliberately, per the practice change noted in Part Six.
- **Enrollment services procurement will begin to reflect the experimental record.** We expect institutions to start asking providers for independently evaluated outcomes and to begin writing

completion linked performance terms. Whether the market responds by changing scope or by contesting the evidence is the question worth watching.

Our standing question for the coming quarter follows from the theme of this one: are members verifying the figures on which their commitments rest, or inheriting them? The next edition will measure progress against that question, and against the forecasts above.

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