TOTAL ECONOMIC IMPACT

The Total Economic Impact™ Of Google Workspace For Education Plus In Higher Education

A FORRESTER TOTAL ECONOMIC IMPACT STUDY COMMISSIONED BY GOOGLE, APRIL 2026

COST SAVINGS AND BENEFITS ENABLED BY GOOGLE WORKSPACE FOR EDUCATION PLUS IN HIGHER EDUCATION

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Executive Summary

Higher education institutions face increasing pressure to provide secure, reliable, and modern digital environments that meet the needs of students, faculty, and staff. Rising security threats, growing expectations for AI-enabled learning and productivity tools, and the need to modernize while managing constrained budgets all place new demands on institutional technology. Institutions are prioritizing solutions that strengthen security, simplify their technology environments, and enhance teaching and learning experiences through collaborative, easy-to-use, and increasingly AI-powered tools.

Google Workspace for Education Plus is the most comprehensive edition of Google Workspace for Education, providing advanced security protections and insights, Gemini-powered collaboration and instructional tools, and foundational Google AI tools. By unifying core applications, instructional tools, enhanced security features, and AI tools like Gemini for Education and Google NotebookLM in a single platform, the solution helps institutions modernize their digital environments and better support their academic communities. With Education Plus, higher-education organizations see improvements in security and IT operations, efficiencies from consolidating legacy tools, and greater productivity and effectiveness across faculty, staff, and students.

Google commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) higher education organizations may realize by deploying Education Plus.[1] The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of Education Plus on their organizations.

238%

Return on investment (ROI)

$2.8M

Net present value (NPV)

> *"Education Plus facilitates a collaborative, shared experience for the university and has integrated security and compliance features that bring significant value. It's really the enterprise tooling you need to operate a business of scale."*
>
> **CIO, higher education**

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed five decision-makers across four higher education organizations and surveyed 202 respondents with experience using Education Plus in higher education. For the purposes of this study, Forrester aggregated the experiences of the interviewees and survey respondents and combined the results into a single composite organization, which is a university with 25,000 students.

Before adopting Education Plus, interviewees' and survey respondents' organizations typically relied on a mix of legacy teaching, learning, collaboration, and security tools that required significant administrative effort to maintain. These environments often made it difficult to meet evolving security and operational efficiency demands, and lacked the enhanced protections, integrated AI capabilities, and a unified approach to managing these tools that interviewees and survey respondents wanted. In response to these challenges, these organizations sought a comprehensive, secure platform to better support modern academic and operational needs.

After implementing Education Plus, interviewees and survey respondents reported improvements in security posture, operational efficiency, and teaching and learning experiences. Key results from the investment included strengthened security, improved IT efficiency, cost savings from consolidating tools, and improved productivity and effectiveness for staff, faculty, and students due to AI-powered assistance.

Key Findings

Quantified benefits. Three-year, risk-adjusted present value (PV) quantified benefits for the composite organization include:

- **Improved security and IT operations efficiency, saving 18% of total IT team time and $1.5 million.** Education Plus's enhanced security features reduce risk and strengthen the security posture at the composite organization. These security features include centralized visibility and controls, proactive threat detection and remediation tools, advanced device and endpoint management, AI-powered threat detection, Zero Trust access controls, and data loss prevention (DLP) tools. With these capabilities, the composite lowers exposure to spam, phishing, malware, and ransomware, as well as decreases the time required to detect, investigate, and respond to threats. These improvements, together with Education Plus's cloud-native architecture and integrated security stack, simplify the security environment, lessen manual effort, and save time across the IT team.
- **Security tool and storage cost savings, totaling $517,000.** Education Plus's expanded security controls and built-in tooling enable the composite organization to realize direct cost savings from consolidating, retiring, or avoiding third-party security solutions that would otherwise be required (e.g., tools to secure communications, manage identity and access, protect content and documentation, defend against malware and ransomware, filter spam, and enforce DLP). The composite organization also benefits from the additional storage included with Education Plus, which allows it to avoid separate storage solutions and their associated costs.

> *"The security solutions [we would need without Education Plus] are very expensive. They would cost much more than the Education Plus cost. Google is very cost-effective."*
>
> **CTO, higher education**

- **Collaboration and learning tool cost savings, totaling $416,000.** Education Plus serves as a comprehensive collaboration and learning platform for the composite organization, with integrated capabilities for videoconferencing with Meet, AI assistance and integrations, translation and accessibility, electronic signature, and plagiarism detection. As such, the composite organization retires or consolidates overlapping legacy tools across these areas and realizes direct cost savings.

More than 3 hours

Average weekly time nonteaching employees at survey respondents' organizations saved due to Gemini and NotebookLM

- **AI-augmented assistance for nonteaching staff, saving up to 3 hours per week per user and delivering $1.5 million in value.** Education Plus enables administrators and nonteaching staff at the composite organization to communicate and collaborate in real time with apps such as Gmail, Drive, Meet, Chat, Docs, Sheets, and Slides. They can also effectively leverage AI with Gemini for Education and NotebookLM to improve efficiency and work quality. Employees save meaningful time as they use Gemini for Education and NotebookLM to automate administrative tasks, streamline data analysis and reporting, create content, and summarize documents. In Education Plus, Gemini is embedded directly in Docs, Slides, Classroom, Forms, and Vids, making them available and easy to use within existing workflows. Education Plus enables the

composite organization to adopt AI securely and at scale, with the security, data privacy protections, and control over organizational data that the composite requires to use it institutionwide.

> *"Education Plus is more than useful — it's critical. It's a positive force for education. It provides synchronization and communication. ... Gemini is very, very useful. NotebookLM is fantastic."*
>
> **CTO, higher education**

85%

of survey respondents reported that Gemini and NotebookLM were "Important", "Very important," or "Essential" to their organization

Benefits to faculty and students. Benefits that provide value for faculty and students at interviewees' and survey respondents' organizations but are not quantified for the purposes of the ROI analysis include:

- **Enhanced faculty experience.** Interviewees and 81% of survey respondents reported that Education Plus enhanced faculty productivity, and furthermore, that the platform supported efficient collaboration, real-time communication, and AI assistance with Gemini and NotebookLM.[2] Survey respondents estimated that faculty using Gemini and NotebookLM saved 4 hours per week on average, and 79% of respondents said these tools significantly or moderately empowered faculty.[3] Faculty used Gemini to streamline administrative tasks, simplify lesson preparation, and more clearly explain complex topics, while NotebookLM was used to prepare classes using trusted content, align curriculum across courses and semesters, and organize materials for teaching and research in a single workspace. The time savings helped mitigate burnout and allowed a greater focus on high-impact work, such as teaching, research, and student support.

> *"In working with historical material, starting research, or understanding a new concept, Gemini is exponentially enhancing [faculty and researcher] skill sets. It's not making experts, but it's making experts better."*
>
> **CIO, higher education**

More than 4 hours

Average weekly time faculty at survey respondents' organizations saved due to Gemini and NotebookLM

- **Improved student learning.** Interviewees and 73% of survey respondents reported that Education Plus provided clearer, easier to access, and better-organized learning resources through familiar and easy-to-use tools, therefore improving the student learning experience.[4] Survey respondents also reported that 78% believed Gemini and NotebookLM moderately or significantly improved student learning outcomes.[5] Students used Gemini to simplify difficult concepts, summarize dense material, and gain faster comprehension of course content, while NotebookLM provided clearer and better-organized learning resources and enabled easier access and understanding of personalized study materials. Survey respondents additionally

noted the broad adoption of Gemini and NotebookLM among students, with an average of 80% using these tools daily or weekly.

> *"NotebookLM is very useful. [We used it to create] a database of all the research and dissertation papers at our university and an agent can answer questions about it. It's a very, very powerful [tool] to get specific information regarding our research. You can also make presentations, graphs, and podcasts. [Before this], nobody understood everything the university produced."*
>
> **CTO, higher education**

Costs. Three-year, risk-adjusted PV costs for the composite organization include:

- **Subscription costs.** The composite organization pays subscription costs to Google for the use of Education Plus. This cost is driven by the number of users and is a risk-adjusted $198,000 per year for the composite organization.
- **Internal labor.** The composite organization incurs internal labor costs when deploying Education Plus, including the time IT staff dedicate to implementation, migration, and ongoing management. Additionally, the broader workforce, especially nonteaching staff and power users, spend time learning and becoming familiar with Education Plus and its AI capabilities. These costs total $674,000 for the composite organization over three years.

The financial analysis that is based on the interviews and survey found that a composite organization experiences benefits of $3.9 million over three years versus costs of $1.2 million, adding up to a net present value (NPV) of $2.8 million and an ROI of 238%.

> *"[That Google owns its own AI] is their single greatest value proposition. It's their ability to be vertically integrated and enforce their own least privileged access and key controls from a data protection perspective."*
>
> **CIO, higher education**

Voice Of Survey Respondents

- **81%** reported that Education Plus enhanced faculty productivity
- **79%** said Gemini and NotebookLM significantly or moderately empowered faculty
- **82%** of faculty used Gemini and NotebookLM daily or weekly
- **73%** reported that Education Plus improved the student learning experience
- **78%** believed Gemini and NotebookLM moderately or significantly improved student learning outcomes
- **80%** of students used Gemini and NotebookLM daily or weekly

Key Statistics

238%

Return on investment (ROI)

$3.9M

Benefits PV

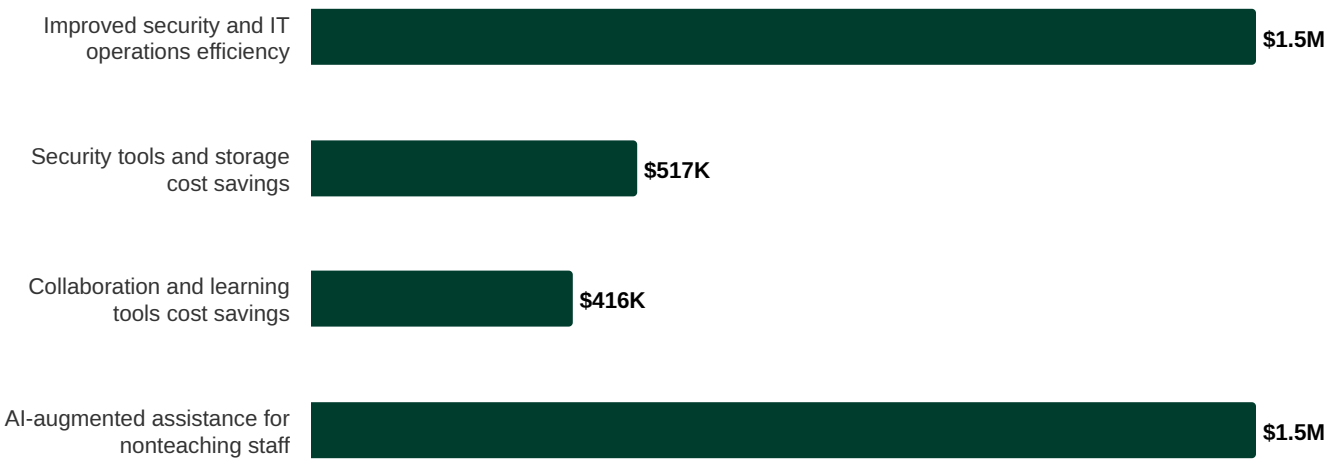
$2.8M

Net present value (NPV)

<6 months

Payback

Benefits (Three-Year)



The Google Workspace For Education Plus In Higher Education Customer Journey

Drivers leading to the Education Plus investment

Interviews			
Role	**Region**	**Number Of Students**	**Number Of Employees**
CIO	North America	30,000	10,000
CTO	LATAM	60,000	8,000
Deputy dean of computing	APAC	20,000	2,500
IT director	EMEA	60,000	8,000
Senior project manager	EMEA	60,000	8,000

Key Challenges

Before adopting Education Plus, interviewees' and survey respondents' organizations relied on legacy productivity, teaching, and learning suites along with point solutions as needed. Interviewees and survey respondents reported struggling with common challenges in their prior environments, including:

- **Insufficient security capabilities.** Interviewees said their prior environments did not always provide adequate controls for safeguarding communications, data, or devices. Among survey respondents, 56% reported that insufficient security capability led their organization to seek out Education Plus, and the same percentage said their organization lacked sufficient visibility and control over data and security in its legacy environments.[6]
- **Time-consuming IT administration.** Prior to Education Plus, interviewees' organizations struggled to manage multiple systems, integrations, and inconsistent security features. Thirty-nine percent of survey respondents identified complex and time-consuming IT administration as a driver for adopting Education Plus.[7] The deputy dean of computing added, "There was no synchronization with [our legacy system] and there were technical challenges."
- **Gaps in teaching and learning tools.** Interviewees often said their legacy tools were cumbersome, poorly integrated, and insufficient to support teaching, learning, and videoconferencing needs. Similarly, 62% of survey respondents reported gaps in teaching and learning tools prior to Education Plus.[8] Storage constraints were also common, as the CIO noted, "We had challenges [with our legacy solution], particularly for file storage."
- **The need for secure AI tooling.** Interviewees said their organizations were increasingly looking for ways to enhance faculty, student, and staff experiences through secure and effective AI tools. Many interviewees viewed the inclusion of Gemini and NotebookLM with Education Plus as an opportunity to introduce institutionwide AI tools without additional cost or complexity, supporting their broader goals for improving teaching, learning, and administrative effectiveness.

> *"The overall management of [Education Plus] is extremely straightforward. It's not a heavy lift, even for our excessively large university population."*
>
> **CIO, higher education**

Composite Organization

Based on the interviews and survey, Forrester constructed a TEI framework, a composite organization, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the interviewees' organizations, and it is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

- **Description of composite.** The composite organization is a large higher education institution with 25,000 students, 2,500 faculty, and 2,500 nonteaching staff. Education Plus serves as its primary teaching, learning, and collaboration platform, replacing legacy tools.
- **Deployment characteristics.** The composite organization deploys Education Plus across 30,000 users following a six-month implementation and migration effort led by an internal IT team. A small subset of IT staff leads ongoing management. All 30,000 students, faculty, and nonteaching staff are Education Plus users.

KEY ASSUMPTIONS

- 30,000 Education Plus users
- 25,000 students
- 2,500 teaching staff
- 2,500 nonteaching staff

Analysis Of Benefits

Quantified benefit data as applied to the composite

Total Benefits						
Ref.	**Benefit**	**Year 1**	**Year 2**	**Year 3**	**Total**	**Present Value**
Atr	Improved security and IT operations efficiency	$607,500	$607,500	$607,500	$1,822,500	$1,510,763
Btr	Security tools and storage cost savings	$207,900	$207,900	$207,900	$623,700	$517,017
Ctr	Collaboration and learning tools cost savings	$167,400	$167,400	$167,400	$502,200	$416,299
Dtr	AI-augmented assistance for nonteaching staff	$506,250	$607,500	$708,750	$1,822,500	$1,494,788
	Total benefits (risk-adjusted)	$1,489,050	$1,590,300	$1,691,550	$4,770,900	$3,938,867

Improved Security And IT Operations Efficiency

Evidence and data. Interviewees and survey respondents reported that their organizations experienced a strengthened security posture after implementing Education Plus, pointing to features such as centralized visibility and controls, proactive threat detection and remediation tools, advanced device and endpoint management, AI-powered threat detection, Zero Trust access controls, and DLP tools. These capabilities reduced exposure to spam, phishing, malware, and ransomware and decreased the time required to detect, investigate, and respond to threats. As a result, Education Plus made their environments easier to manage. Interviewees and most survey respondents said their organizations saw improvements in IT efficiency, with survey respondents estimating an average time savings of 18% across their IT teams due to Education Plus.[9]

- The IT director explained that Education Plus's cloud-native architecture and enhanced integrated security stack reduced the burden of managing risk internally: "In general, going to a cloud with a stack like this, you are actually outsourcing your security risk to Google. And I must say, we've been very impressed with the offering from that perspective."
- Interviewees noted that the security enhancements with Education Plus translated into operational efficiency as their IT environments required less oversight and were easier to manage. The CTO said: "Education Plus has a great quality where it's just noiseless. It's very efficient [to manage]."

Survey Respondents Reported Reductions In Security Threats

- **62%** decrease in spam
- **50%** decrease in phishing
- **38%** decrease in malware
- **26%** decrease in ransomware

- Survey respondents reported reductions in malicious activity with Education Plus, including average decreases in spam of 62%, phishing of 50%, malware of 38%, and ransomware of 26%.[10] Interviewees also noted these reductions, with the CIO adding, "Education Plus does a really good job of identifying increasingly sophisticated phishing attempts compared to the competitors."

Survey Respondents Reported Faster Security Threat Management

- **41%** faster detecting threats
- **30%** faster investigating threats
- **20%** faster responding to threats

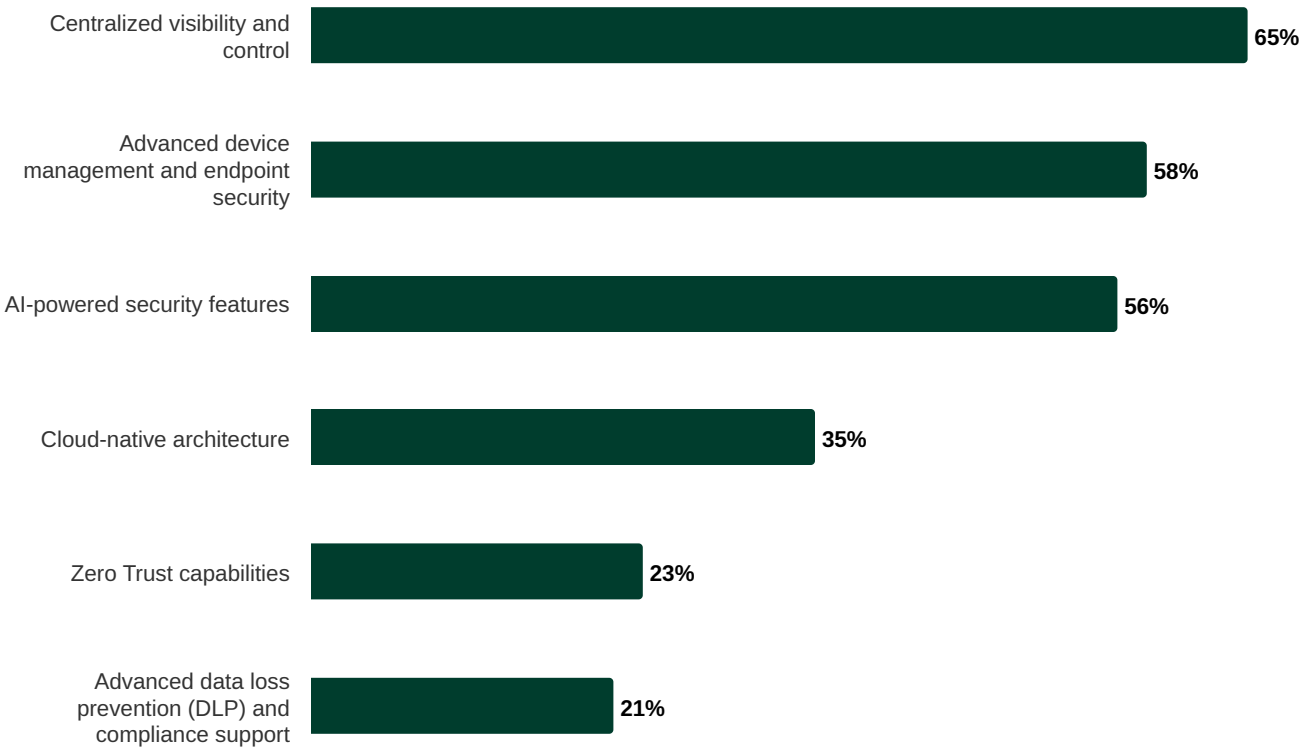
- Interviewees also described Education Plus's automated threat protection and remediation capabilities as highly effective. On average, survey respondents reported that Education Plus decreased time to detect threats by 41%, time to investigate by 30%, and time to respond by 20%.[11]

> *"Education Plus has freed up very key technical resources for other work. There's absolutely time savings."*
>
> **IT director, higher education**

- Interviewees highlighted that Education Plus enhanced visibility and control through the Admin console, allowing IT teams to quickly identify misuse, enforce appropriate use, and prevent data exfiltration. Moreover, Education Plus's advanced logging and identity controls supported least-privilege access and helped ensure that day-to-day use of Education Plus tools remained secure and compliant at interviewees' organizations.
- The CIO said that Google's vertically integrated security architecture delivers more reliable access-control enforcement than alternatives: "Because Google is vertically integrated, they're able to effectively enforce row-level or item-level access control with high, high confirmation that they're not drifting beyond their access control. That's been incredibly evident. [We've seen other providers] inadvertently drift beyond controlled access spaces and their ability to then tell us on a support incident what happened is next to zero. It's evident that their underpinnings are not equal."

> *"The Zero Trust capabilities and context-aware access [with Education Plus] are best in class."*
>
> **CIO, higher education**

“What features and capabilities of Education Plus have improved security posture at your organization?”



Note: Showing six responses
Base: 52 global IT and administrative decision-makers at higher education organizations with improved security posture using Education Plus
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026

Modeling and assumptions. Based on the interviews and survey, Forrester assumes the following about the composite organization:

- There are 60 employees on the IT team.
- Due to Education Plus, these 60 IT employees see time savings of 18% on average.
- The fully burdened annual salary for IT employees is $125,000.
- The productivity recapture rate for employees is 50%. This means employees convert 50% of their saved time into productive time.

18%

Time savings across the IT team

Risks. The benefit of improved security and IT operations efficiency will vary based on:

- The tools and solutions used prior to Education Plus.
- The extent to which the organization leverages the security features of Education Plus.
- The size and skill set of the IT team.
- The average annual fully burdened salary of an IT team employee.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of $1.5 million.

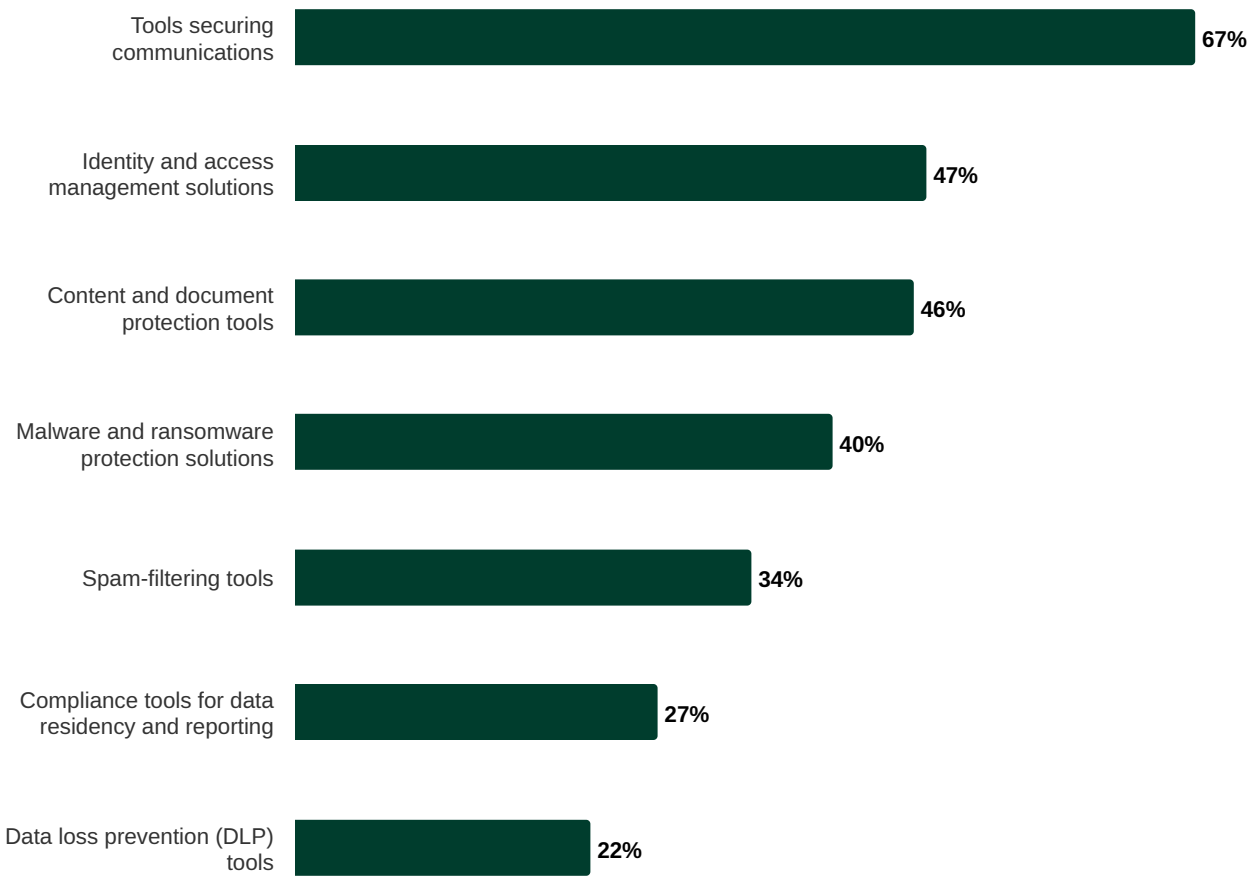
Improved Security And IT Operations Efficiency					
Ref.	**Metric**	**Source**	**Year 1**	**Year 2**	**Year 3**
A1	IT team employees	Composite	60	60	60
A2	Time savings across IT team due to Education Plus (percentage)	Interviews and survey	18%	18%	18%
A3	Fully burdened annual salary for an IT team employee	Composite	$125,000	$125,000	$125,000
A4	Productivity recapture	TEI standard	50%	50%	50%
At	Improved security and IT operations efficiency	A1*A2*A3*A4	$675,000	$675,000	$675,000
	Risk adjustment	↓10%			
Atr	Improved security and IT operations efficiency (risk-adjusted)		$607,500	$607,500	$607,500
	Three-year total: $1,822,500		**Three-year present value: $1,510,763**		

Security Tools And Storage Cost Savings

Evidence and data. Given the expanded security controls available with Education Plus, interviewees and survey respondents reported direct cost savings from consolidating, retiring, or avoiding third-party security tools, such as those used to secure communications, manage identity and access, protect content and documentation, defend against malware and ransomware, filter spam, and enforce DLP.

- Interviewees described Education Plus as a cost-effective means to obtain the security tooling they needed, eliminating the need to procure separate point solutions. For example, the CIO said, "[With the built-in mail routing and security controls in Education Plus], we don't need an additional mail cleanser or additional tools looking at inbound and outbound [email]." The same interviewee also noted: "Additional tools are made available with Education Plus. … Vault facilitates compliance, archival, and retrieval for incident response."
- The CTO added: "We'd likely have to buy something else for data loss prevention [if we didn't have Education Plus]. I have many talks with security people trying to sell me something but at the end of the day, most of it is irrelevant."
- Interviewees and survey respondents also noted the additional storage available with Education Plus, and 58% of survey respondents identified it as a benefit.[12] The CIO added: "One of the primary value-adds of Education Plus is the additional storage per user. It's significant."

“Which of the following security tools or products have you been able to retire or consolidate due to the improved protection with Education Plus?”



Note: Showing seven responses
Base: 90 global IT and administrative decision-makers at higher education organizations using Education Plus that are retiring or consolidating legacy tools
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026

Modeling and assumptions. Based on the interviews and survey, Forrester assumes the composite organization consolidates or retires security and storage solutions, saving $231,000 annually.

Risks. The benefit of security tools and storage cost savings will vary based on:

- The cost of legacy solutions and how quickly they are consolidated or retired.
- The extent to which the organization fully leverages Education Plus’s built-in security and storage capabilities to replace or avoid third-party tools.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of $517,000.

Security Tools And Storage Cost Savings					
Ref.	**Metric**	**Source**	**Year 1**	**Year 2**	**Year 3**
B1	Cost savings from consolidating and retiring security and storage solutions	Interviews and survey	$231,000	$231,000	$231,000
Bt	Security tools and storage cost savings	B1	$231,000	$231,000	$231,000
	Risk adjustment	↓10%			
Btr	Security tools and storage cost savings (risk-adjusted)		$207,900	$207,900	$207,900
	Three-year total: $623,700		**Three-year present value: $517,017**		

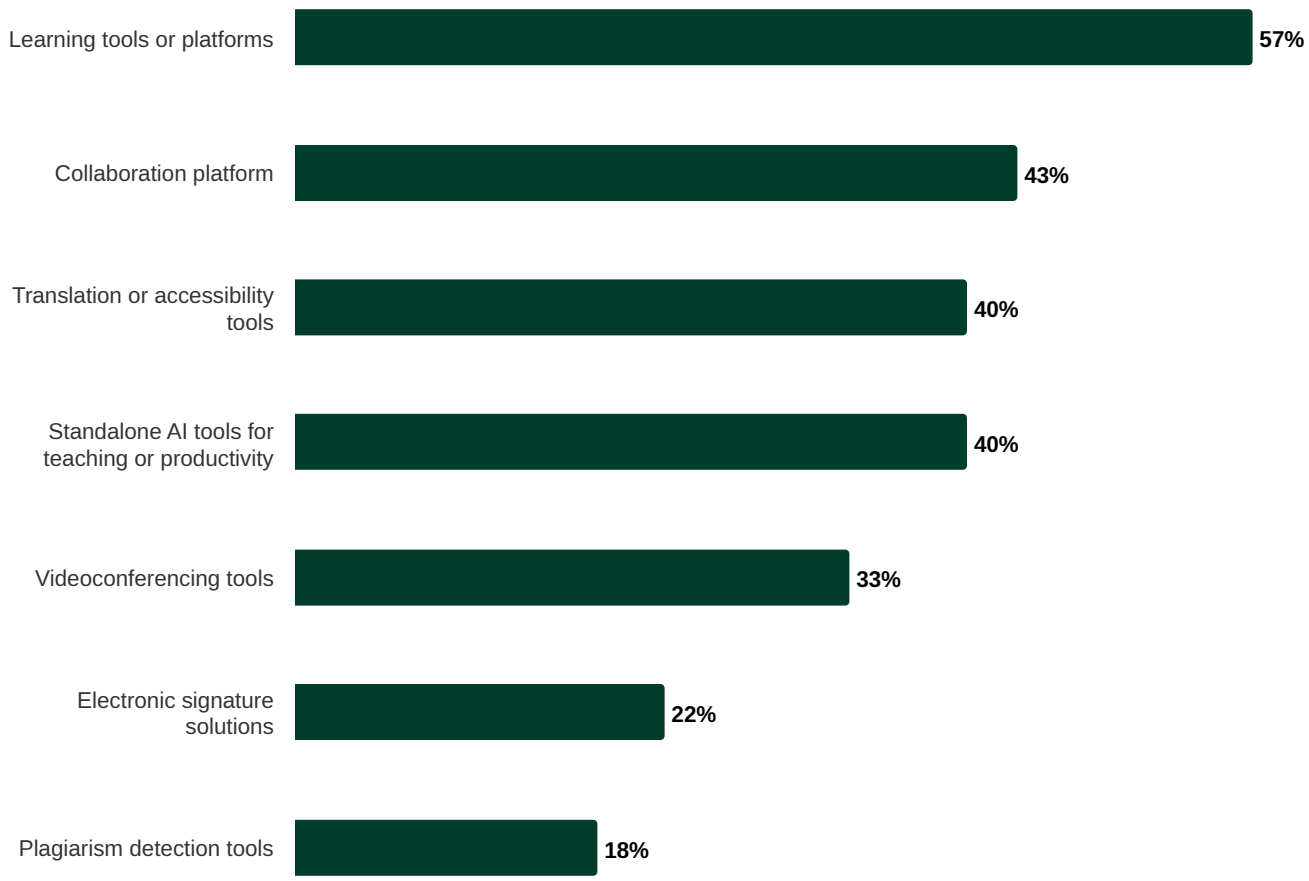
Collaboration And Learning Tools Cost Savings

Evidence and data. At interviewees' and survey respondents' organizations, Education Plus served as a comprehensive platform for communication and collaboration that enabled cost savings from retiring or consolidating legacy tools, such as those used for learning and collaboration, translation, AI assistance, and videoconferencing.

- Education Plus served as the primary collaboration platform at interviewees' organizations, eliminating a need for alternatives. The CTO said, "Education Plus facilitates the kind of collaboration that people are looking for."
- The deputy dean of computing explained that Education Plus satisfied their organization's AI tooling needs, noting, "[With] Gemini and NotebookLM, we do not need other [AI] products."
- Interviewees reported consolidating videoconferencing tools as they standardized on Meet for meetings and instruction. They said with Education Plus, Meet supports large group sizes and provides other premium features like waiting and breakout rooms, polls, and attendance tracking.
- The CTO emphasized the value of Google Classroom: "All the students have access to Classroom. It's frictionless to use. It's resilient. We never see instances of it not working or being slow. It's always there, like the blackboard."
- More broadly, interviewees described the Education Plus tools as easy to use. The deputy dean of computing said: "Gmail and Drive are very helpful in daily tasks. They're very user-friendly. … I would say in general Google products are all easy to use."

> *"Education Plus is very simple and efficient to use. We can communicate very easily just using Meet and collaboration is easy with Drive."*
>
> **CTO, higher education**

“Which of the following teaching or learning tools have you been able to retire or consolidate due to Education Plus?”



Note: Showing seven responses
Base: 90 global IT and administrative decision-makers at higher education organizations using Education Plus that are retiring or consolidating legacy tools
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026

Modeling and assumptions. Based on the interviews and survey, Forrester assumes the composite organization consolidates or retires collaboration and learning solutions, saving $186,000 annually.

Risks. The benefit of collaboration and learning tool cost savings will vary based on:

- The cost of legacy solutions and how quickly they are consolidated or retired.
- The extent to which the organization fully leverages Education Plus to replace or avoid third-party tools.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of $416,000.

Collaboration And Learning Tools Cost Savings					
Ref.	**Metric**	**Source**	**Year 1**	**Year 2**	**Year 3**
C1	Cost savings from consolidating and retiring collaboration and learning tools	Interviews and survey	$186,000	$186,000	$186,000
Ct	Collaboration and learning tools cost savings	C1	$186,000	$186,000	$186,000
	Risk adjustment	↓10%			
Ctr	Collaboration and learning tools cost savings (risk-adjusted)		$167,400	$167,400	$167,400
	Three-year total: $502,200			**Three-year present value: $416,299**	

AI-Augmented Assistance For Nonteaching Staff

Evidence and data. Interviewees and survey respondents reported that administration and nonteaching staff benefited from Education Plus, as it allowed them to communicate and collaborate in real time and use Gemini and NotebookLM to improve the efficiency and quality of their work. Interviewees and a majority of survey respondents said Education Plus enabled their organizations to securely and effectively use AI tools. Respondents reported that nonteaching employees leveraging Gemini and NotebookLM saved more than 3 hours per week on average.[13] Nonteaching employees used Gemini and NotebookLM to automate administrative tasks, streamline data analysis and reporting, create content, and summarize documents. Interviewees emphasized that secure AI was critical for their organizations, and that Education Plus enabled them to adopt these tools institutionwide with the security, data privacy protections, and control over organizational data they required.

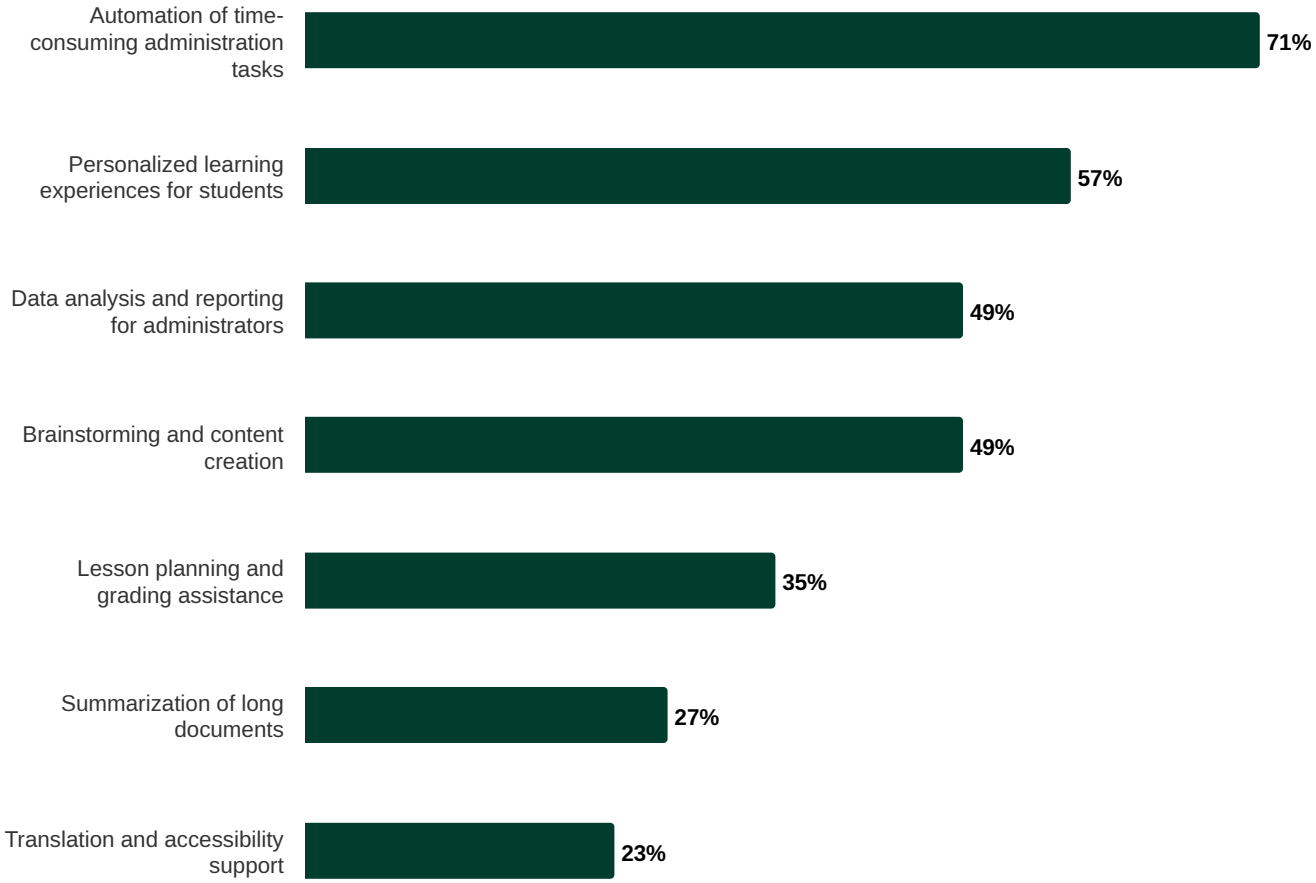
- Beyond time savings, interviewees said Gemini improved decision-making for administrators and staff by highlighting key information and extracting trends from logs, records, and unstructured sources.
- Interviewees described Gemini as an assistant that helped them improve the quality of their work and operate with greater confidence. The CIO elaborated: “Gemini is incredibly good at synthesizing back your own information, surfacing and summarizing Gmail and Drive content, and building on your existing work. It’s fantastic.”
- Interviewees explained that Gemini was also used to improve the clarity and effectiveness of employee communications. The deputy dean of computing added: “Gemini helps in writing proposals, and it improves the quality. We have been relying on the AI tools in Education Plus to help us do that.”
- The IT director noted that the integration of Gemini with apps like Docs, Slides, Forms, and Vids was a differentiator: “The integration of Gemini into the application layers is very, very cool. … People are seeing the productivity benefits of that as opposed to [alternatives] that don’t integrate.”

> *“NotebookLM is a very powerful solution. You can add the material that you truly trust, so the answers are more reliable. We also use it to create infographics, which are very useful.”*
>
> **CTO, higher education**

- Interviewees said staff leveraged NotebookLM to quickly and accurately understand and act on complex information in a single, trusted environment. NotebookLM was used to centralize records, operational details, and institutional documents, which helped keep information consistent across departments and easier to find and understand. Staff at interviewees’ organizations also used NotebookLM to streamline reporting, policy reviews, accreditation preparation, and the organization of large document sets.

- More generally, interviewees emphasized that Education Plus enabled employees to communicate and collaborate in real time using integrated applications such as Gmail, Drive, Meet, Chat, Docs, Sheets, and Slides. The senior project manager said: "Collaboration is the first thing that pops into my mind [when thinking about the value of Education Plus]. It made collaboration much, much easier. From a project management perspective, sharing documents with Drive has helped a lot."

"Which of the following are benefits of Gemini and/or NotebookLM at your organization?"



Base: 93 global IT and administrative decision-makers at higher education organizations using Education Plus that benefited from Google's AI stack
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026

Modeling and assumptions. Based on the interviews and survey, Forrester assumes the following about the composite organization:

- In Year 1, there are 250 nonteaching employees who are power users of the AI capabilities in Education Plus. This expands to 300 power users in Year 2 and 350 power users in Year 3.
- Due to AI capabilities in Education Plus (e.g., Gemini, NotebookLM, and Gemini in Docs, Slides, Classroom, Vids, and Forms), these employees save 3 hours per week on average.
- The fully burdened hourly rate for nonteaching employees is $30.
- The productivity recapture rate for employees is 50%. This means employees convert 50% of their saved time into productive time.

Risks. The benefit of AI-augmented assistance for nonteaching staff will vary based on:

- The extent of Gemini and NotebookLM adoption.
- The tools and AI capabilities available to employees prior to the adoption of Education Plus.
- The number of nonteaching employees and their fully burdened hourly salary.

Results. To account for these risks, Forrester adjusted this benefit downward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of $1.5 million.

AI-Augmented Assistance For Nonteaching Staff					
Ref.	**Metric**	**Source**	**Year 1**	**Year 2**	**Year 3**
D1	Staff power users of the AI capabilities in Education Plus	Composite	250	300	350
D2	Average time saved per week per user due to the AI capabilities in Education Plus (hours)	Interviews and survey	3	3	3
D3	Fully burdened hourly rate for a nonteaching employee	Composite	$30	$30	$30
D4	Productivity recapture	TEI standard	50%	50%	50%
Dt	AI-augmented assistance for nonteaching staff	D1*D2*D3*D4*50	$562,500	$675,000	$787,500
	Risk adjustment	↓10%			
Dtr	AI-augmented assistance for nonteaching staff (risk-adjusted)		$506,250	$607,500	$708,750
	Three-year total: $1,822,500			**Three-year present value: $1,494,788**	

Benefits To Faculty And Students

Interviewees and survey respondents mentioned the following benefits to faculty and students, though they are not quantified in the ROI analysis:

- **Enhanced faculty experience.** Interviewees and 81% of survey respondents said that Education Plus enhanced teacher productivity, allowing teachers at their organizations to work efficiently and effectively with collaboration, productivity, and AI tools across the Education Plus suite.[14] Interviewees and survey respondents emphasized the value of the AI tools in Education Plus, and survey respondents reported average time savings of over 4 hours per week for faculty due to Gemini and NotebookLM.[15] Faculty used Gemini and NotebookLM to reduce administrative work, accelerate preparation of lessons and course materials, deepen their understanding of complex subjects, and streamline research.
  - Survey respondents reported widespread adoption of AI tools among faculty, with an average of 82% using Gemini or NotebookLM daily or weekly.[16]
  - Interviewees and survey respondents noted that faculty used Gemini to reduce manual administrative tasks, simplify lesson preparation and updates, and clearly explain more complex topics. These efficiencies enabled faculty to devote more time to high-impact work such as teaching, research, and student support.
  - Interviewees emphasized that AI tools augmented, rather than replaced, academic expertise. Seventy-nine percent of survey respondents said Gemini and NotebookLM moderately or significantly empowered faculty.[17]

> *"Students and faculty derive a lot of value [from the AI capabilities in Education Plus]. People are adopting them more and more."*
>
> **IT director, higher education**

- Interviewees and survey respondents said that faculty used NotebookLM to prepare classes using trusted content, align curriculum across courses and semesters, and organize materials for teaching and research.
- The CTO explained that they used NotebookLM to put all their university's research in one place, which allowed faculty to identify collaborators across the university. The interviewee elaborated: "It's very easy to discover colleagues that are more or less working in the same areas and get in contact with them, to propose new ideas and collaborate. It's really very impactful."
- In addition to AI tools, interviewees noted that Education Plus provided faculty effective and integrated collaboration capabilities. The IT director said, "We've gained tremendously from the functionality we get with Education Plus like the integrated applications and collaboration we can offer our researchers."
- Interviewees also noted that Education Plus helped mitigate faculty burnout. The deputy dean of computing said: "The AI tools [in Education Plus] help with lectures and in completing tasks faster. They reduce our workload pressures."

> *"[Education Plus provides the] ability to work from anywhere, anytime, on any device. The business continuity is huge."*
>
> **IT director, higher education**

- **Improved student learning.** Interviewees and survey respondents reported that Education Plus gave students clearer, easier to access, and better-organized learning resources through familiar and easy-to-use tools. It also enabled the faster comprehension of complex topics. This helped strengthen the student learning experience. Seventy-three percent of survey respondents said Education Plus enhanced the student learning experience, and 78% said Gemini and NotebookLM moderately or significantly improved student outcomes.[18]
  - Survey respondents reported broad usage of Gemini and NotebookLM, with an average of 80% using the tools daily or weekly.[19]
  - Survey respondents explained that Gemini simplified difficult concepts, summarized dense material, provided clearer explanations, and supported faster understanding and comprehension.
  - The deputy dean of computing highlighted how NotebookLM benefited students: "Using NotebookLM for the lectures is helping students. The lectures and course materials are there, and students use it to explore the material. And there are sharing features, so it's collaborative actually. It's a new way of learning. We can also customize it to have control."
  - Survey respondents said NotebookLM provided clearer and better-organized learning resources, enabled easier access to translated or personalized study materials, and improved consistency across courses and semesters.

> *"[The Education Plus tools] are all user-friendly and intuitive."*
>
> **Deputy dean of computing, higher education**

- In addition to Gemini and NotebookLM, interviewees noted the value of other Education Plus apps, such as Drive. The CTO said: "Students store their research and analyze their data on Google Drive. It's really powerful and very well-integrated within the [Education Plus] ecosystem." The deputy dean of computing added: "Students use Google Drive often. It makes sharing files easy for them."
- Several interviewees remarked that a benefit of using Education Plus is its familiarity to incoming students. The CIO said, "[Using Google tools is] almost an expectation and second nature for incoming students."

Flexibility

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement Education Plus and later realize additional uses and opportunities, including:

- **AI technology leadership.** Interviewees expressed confidence in Google's pace of innovation and the long-term value of Education Plus to their organizations. The CIO explained: "From an innovation perspective, I think we're going to continue to see Google be a leader. There are a couple of reasons. First, when you look at their release of open standards, historically, the vast majority of the solutions being sold by their competitors were built by Google. Also, I believe they hire the most PhDs in the world. That alone means that they're generally well aligned to higher education."
- **Ongoing innovation and feature expansion.** Interviewees noted that Education Plus delivers increased value over time due to consistent product enhancements and the frequent addition of new AI capabilities to the platform. The deputy dean of technology added, "I'm confident Google will keep on improving."

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in Total Economic Impact Approach).

Analysis Of Costs

Quantified cost data as applied to the composite

Total Costs							
Ref.	**Cost**	**Initial**	**Year 1**	**Year 2**	**Year 3**	**Total**	**Present Value**
Etr	Subscription costs	$0	$198,000	$198,000	$198,000	$594,000	$492,397
Ftr	Internal labor	$478,500	$78,650	$78,650	$78,650	$714,450	$674,091
	Total costs (risk-adjusted)	$478,500	$276,650	$276,650	$276,650	$1,308,450	$1,166,488

Subscription Costs

Evidence and data. Interviewees' organizations paid annual subscription fees to Google for the use of Education Plus. These costs varied by organization and were driven by the number of users and customer-specific pricing.

Modeling and assumptions. Based on the interviews and surveys, Forrester assumes the following about the composite organization:

- There are 30,000 Education Plus users.
- Annual cost per user is $6.
- Pricing may vary. Contact Google for additional details.

Risks. The subscription costs will vary based on:

- The number of users.
- Customer-specific pricing.

Results. To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of $492,000.

Subscription Costs						
Ref.	**Metric**	**Source**	**Initial**	**Year 1**	**Year 2**	**Year 3**
E1	Education Plus users	Composite		30,000	30,000	30,000
E2	Annual cost per user	Interviews		$6	$6	$6
Et	Subscription costs	E1*E2	$0	$180,000	$180,000	$180,000
	Risk adjustment	↑10%				
Etr	Subscription costs (risk-adjusted)		$0	$198,000	$198,000	$198,000
	Three-year total: $594,000			**Three-year present value: $492,397**		

Internal Labor

Evidence and data. Interviewees said that a subset of the IT team supported the implementation and migration to Education Plus, after which one or two employees were responsible for its ongoing management. Interviewees also noted that employees,

particularly nonteaching staff and power users, spent time becoming familiar with Education Plus and its AI-enabled capabilities.

Modeling and assumptions. Based on the interviews and surveys, Forrester assumes the following about the composite organization:

- Twelve FTEs are dedicated to the implementation of and migration to Education Plus over the course of six months. During this period, they spend 50% of their time on this effort.
- Two FTEs are dedicated to the ongoing management of Education Plus thereafter and dedicate 25% of their time.
- The average fully burdened annual salary for employees dedicated to the implementation and ongoing management of Education Plus is $125,000.
- Employees, particularly power users of the AI capabilities in Education Plus, spend time learning, getting comfortable, and gaining proficiency with Education Plus's capabilities. The time spent organizationwide translates to $60,000 initially and $9,000 per year thereafter.

Risks. The internal labor cost will vary based on:

- Organization size.
- The scope of the implementation.
- The number of employees.
- Employee skill set and salary.

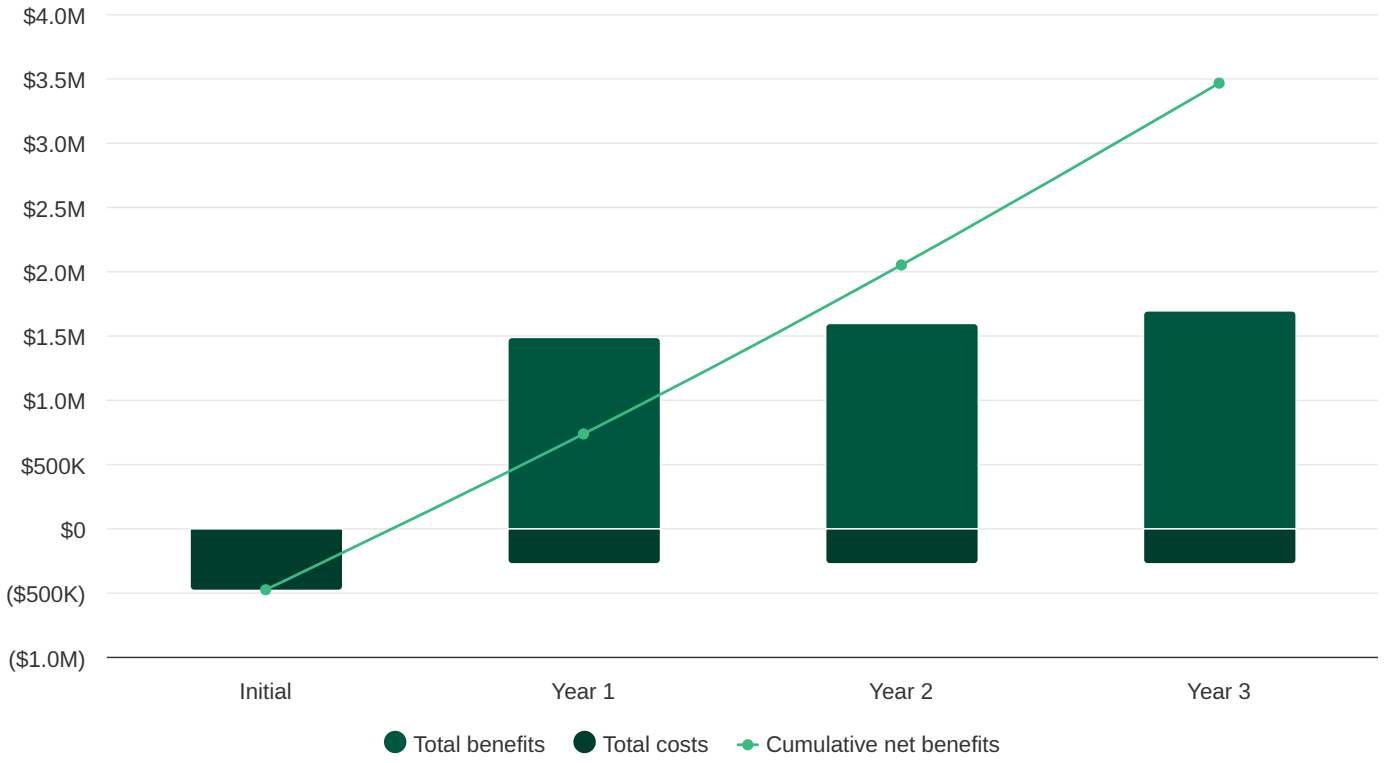
Results. To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of $674,000.

Internal Labor						
Ref.	**Metric**	**Source**	**Initial**	**Year 1**	**Year 2**	**Year 3**
F1	FTEs dedicated to implementation and ongoing management	Interviews	12	2	2	2
F2	Time dedicated to implementation and ongoing management (percentage)	Interviews	50%	25%	25%	25%
F3	Fully burdened annual salary for an FTE involved in implementation and ongoing management	Composite	$125,000	$125,000	$125,000	$125,000
F4	Length of implementation (months)	Interviews	6			
F5	Implementation and ongoing management costs	Initial: (F1*F2*F3*F4)/12 Y1 to Y3: F1*F2*F3	$375,000	$62,500	$62,500	$62,500
F6	Training costs	Interviews	$60,000	$9,000	$9,000	$9,000
Ft	Internal labor	F5+F6	$435,000	$71,500	$71,500	$71,500
	Risk adjustment	↑10%				
Ftr	Internal labor (risk-adjusted)		$478,500	$78,650	$78,650	$78,650
		Three-year total: $714,450			**Three-year present value: $674,091**	

Financial Summary

Consolidated Three-Year, Risk-Adjusted Metrics

Cash Flow Chart (Risk-Adjusted)



Cash Flow Analysis (Risk-Adjusted)						
	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	($478,500)	($276,650)	($276,650)	($276,650)	($1,308,450)	($1,166,488)
Total benefits	$0	$1,489,050	$1,590,300	$1,691,550	$4,770,900	$3,938,867
Net benefits	($478,500)	$1,212,400	$1,313,650	$1,414,900	$3,462,450	$2,772,379
ROI						238%
Payback period (months)						<6 months

Please Note

The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted ROI, NPV, and payback period values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.

TEI Framework And Methodology

From the information provided in the interviews and survey, Forrester constructed a Total Economic Impact™ framework for those organizations considering an investment in Google Workspace for Education Plus.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact that Google Workspace for Education Plus can have on an organization.

Due Diligence

Interviewed Google stakeholders and Forrester analysts to gather data relative to Google Workspace for Education Plus.

Interviews And Survey

Interviewed five decision-makers across four organizations and surveyed 202 respondents at organizations using Workspace for Education Plus to obtain data about costs, benefits, and risks.

Composite Organization

Designed a composite organization based on characteristics of the interviewees' and survey respondents' organizations.

Financial Model Framework

Constructed a financial model representative of the interviews and survey using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewees and survey respondents.

Case Study

Employed four fundamental elements of TEI in modeling the investment impact: benefits, costs, flexibility, and risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see Appendix A for additional information on the TEI methodology.

Glossary

Total Economic Impact Approach

Benefits

Benefits represent the value the solution delivers to the business. The TEI methodology places equal weight on the measure of benefits and costs, allowing for a full examination of the solution's effect on the entire organization.

Costs

Costs comprise all expenses necessary to deliver the proposed value, or benefits, of the solution. The methodology captures implementation and ongoing costs associated with the solution.

Flexibility

Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. The ability to capture that benefit has a PV that can be estimated.

Risks

Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

Financial Terminology

Present value (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PVs of costs and benefits feed into the total NPV of cash flows.

Net present value (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made unless other projects have higher NPVs.

Return on investment (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.

Discount rate

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.

Payback

The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

Appendixes

APPENDIX A

Total Economic Impact

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

APPENDIX B

Survey Demographics

ROLE	
Administration or school leadership	43%
IT/information security	57%

REGION	
North America	25%
LATAM	25%
EMEA	25%
APAC	25%

NUMBER OF STUDENTS	
Fewer than 500	1%
500 to 999	2%
1,000 to 4,999	13%
5,000 to 9,999	19%
10,000 to 29,999	33%
30,000 to 49,999	20%
50,000 or more	12%

NUMBER OF EDUCATORS	
Fewer than 500	6%
100 to 499	14%
500 to 999	25%
1,000 to 2,999	24%
3,000 to 4,999	18%
5,000 to 9,999	12%
10,000 or more	1%

APPENDIX C

Endnotes

[1] Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

[2] Base: 202 global IT and administrative decision-makers at higher education organizations using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[3] Base: 90 global IT and administrative decision-makers at higher education organizations whose faculty use Gemini and/or NotebookLM using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[4] Base: 202 global IT and administrative decision-makers at higher education organizations using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[5] Base: 92 global IT and administrative decision-makers at higher education organizations whose students use Gemini and/or NotebookLM using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[6] Base: 202 global IT and administrative decision-makers at higher education organizations using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[7] Ibid.

[8] Ibid.

[9] Base: 90 global IT and administrative decision-makers at higher education organizations whose faculty use Gemini and/or NotebookLM using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[10] Base: 52 global IT and administrative decision-makers at higher education organizations with improved security posture using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[11] Ibid.

[12] Base: 202 global IT and administrative decision-makers at higher education organizations using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[13] Base: 90 global IT and administrative decision-makers at higher education organizations whose faculty use Gemini and/or NotebookLM using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[14] Base: 202 global IT and administrative decision-makers at higher education organizations using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[15] Base: 90 global IT and administrative decision-makers at higher education organizations whose faculty use Gemini and/or NotebookLM using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[16] Base: 93 global IT and administrative decision-makers at higher education organizations where Gemini and/or NotebookLM are identified as important using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[17] Base: 90 global IT and administrative decision-makers at higher education organizations whose faculty use Gemini and/or NotebookLM using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[18] Base: 202 global IT and administrative decision-makers at higher education organizations using Education Plus; Base: 90 global IT and administrative decision-makers at higher education organizations whose faculty use Gemini and/or NotebookLM using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

[19] Base: 93 global IT and administrative decision-makers at higher education organizations where Gemini and/or NotebookLM are identified as important using Education Plus; Source: A commissioned study conducted by Forrester Consulting on behalf of Google, January 2026.

Disclosures

Readers should be aware of the following:

This study is commissioned by Google and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in Google Workspace for Education Plus.

Google reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Google provided the customer names for the interviews but did not participate in the interviews.

Forrester fielded the double-blind survey using a third-party survey partner.

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