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Assessment in the age of AI

Automation and assurance: how AI is creating opportunities across the assessment value chain

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AI makes assessment cheaper to run, and harder to trust.

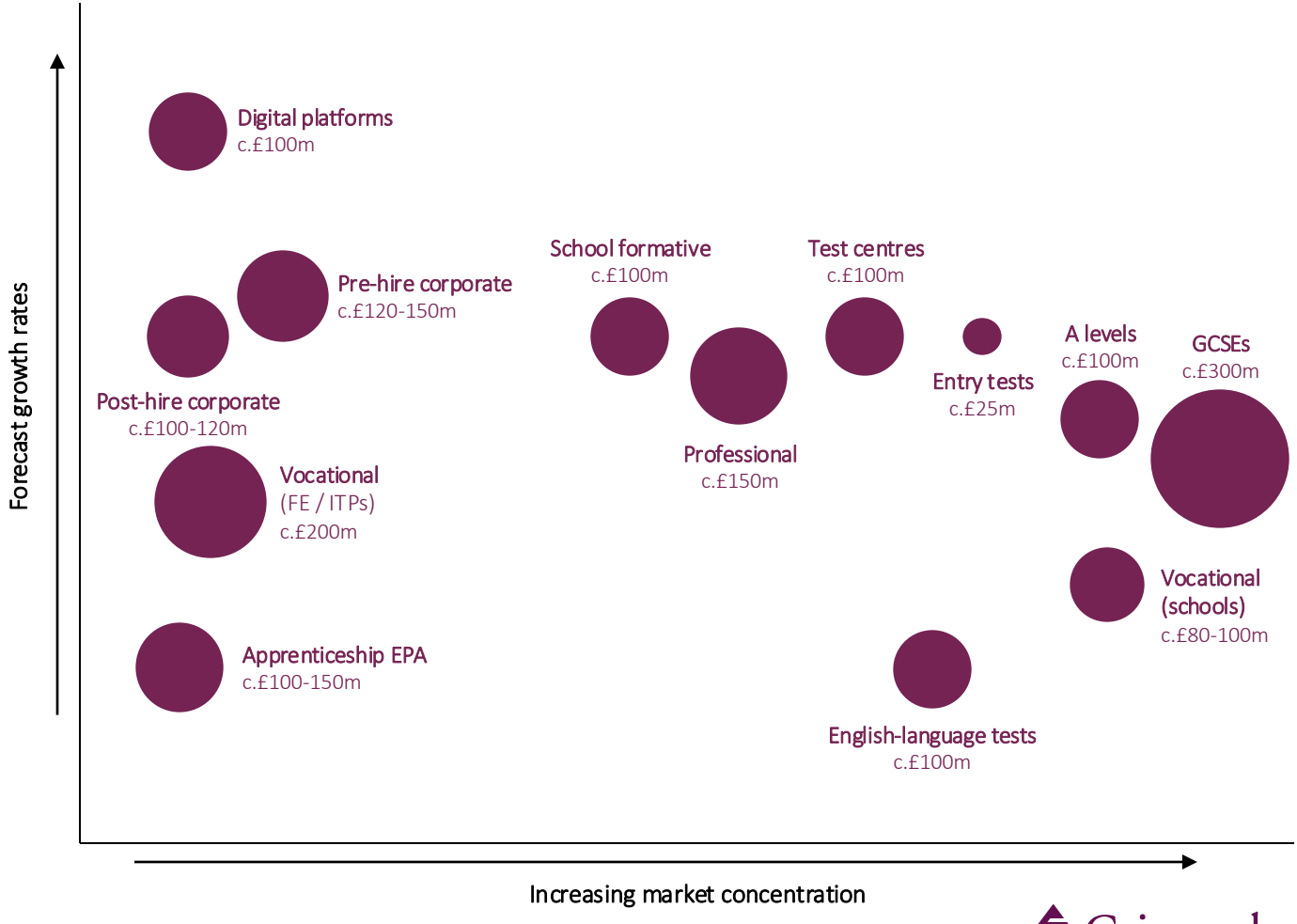
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AI is the biggest shift in assessment in decades. It automates how exams are run and makes trust more valuable, creating opportunities for providers and investors on both fronts

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Strong growth in fragmented sectors indicates buy-and-build opportunities for operators

Bubble area = approx. UK spend, 2024



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AI creates opportunities two areas of diverging opportunity: automation versus assurance

Automate

Speed: AI lets tests be set, delivered and marked faster than traditional methods

Cost: AI significantly lowers the cost of running assessments

Insight: Providers gain richer insight into candidate performance

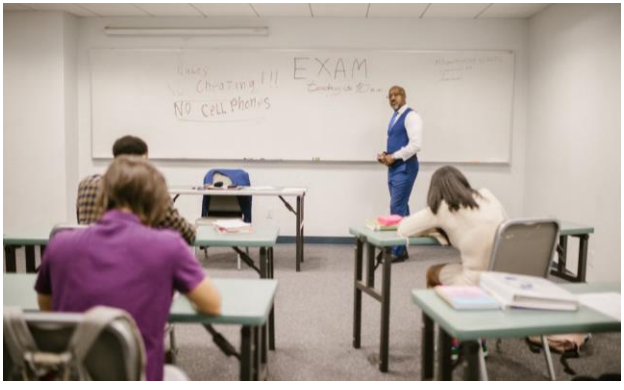
Assure

Trust: Cheating is easier, increasing demands for secure environments

Compliance: Data protection standards become even more important

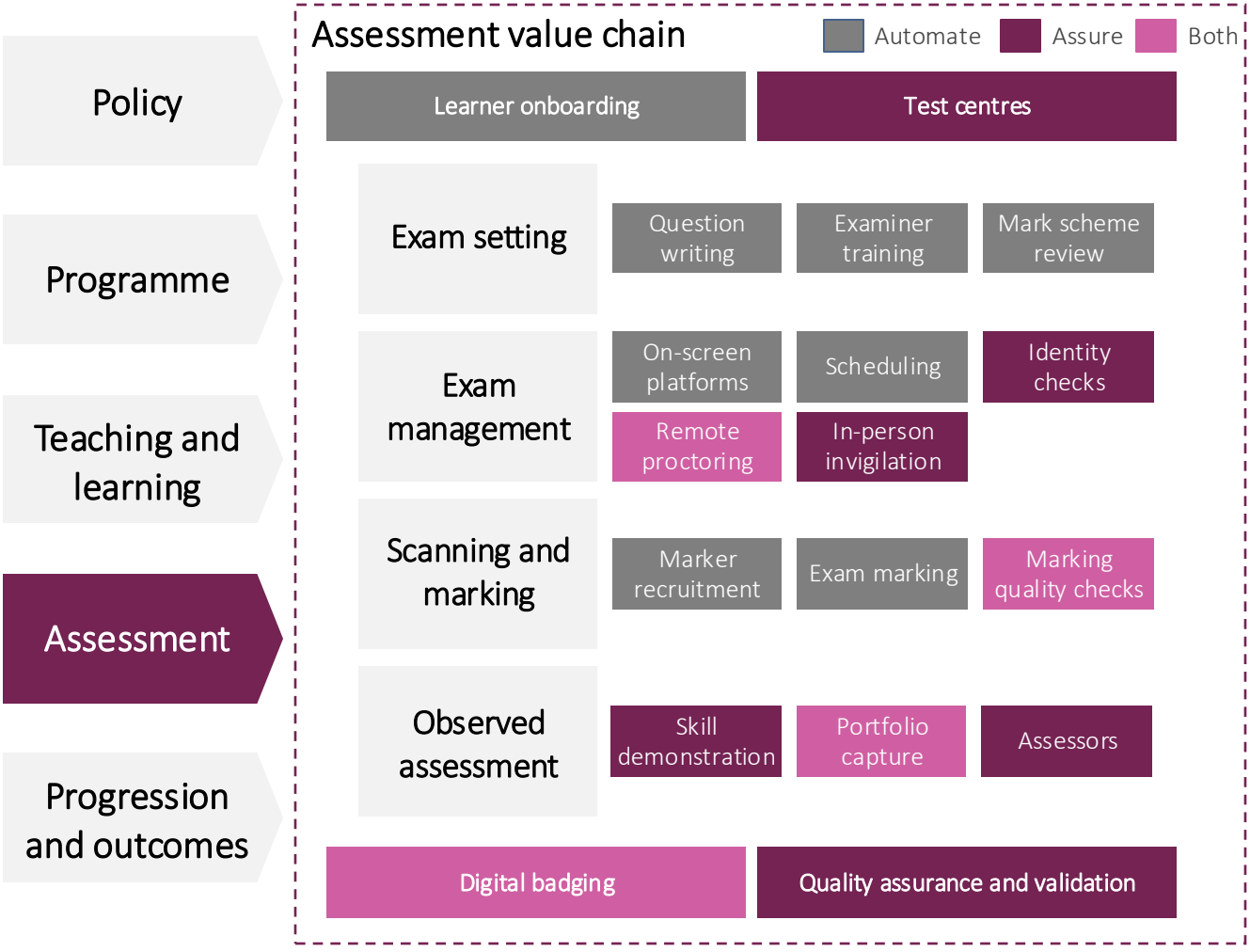
Relevance: AI is reshaping the job market and thus the demand for qualifications





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AI automates much of the value chain, while raising the premium on assuring trust



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AI is impacting each customer differently, with workplaces most impacted

	The key question	Unmet assessment need	AI impact
Schools	Do schools have the mindset and infrastructure to embrace AI's role in formative assessments?	●●●○	●●●○
FE colleges and training providers	Can non-moderated assessments still be a valid method of evaluation?	●●●●	●●●●
Universities	With high-stakes exams increasingly in secure rooms, should providers outsource or run assessments directly?	●●●○	●●●●
Employers, learners, and employees	As AI reshapes jobs, how can employers screen applicants, and how can learners show commitment and direction?	●●●●	●●●●
Government and regulators	When will regulators permit AI marking and on-screen exams?	●○○○	●●○○

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Providers are building winning positions by automating, assuring, or combining both



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Developing your thesis for growth or investment requires understanding your positioning

1 **Know where you play**

- Which stage of the value chain do you serve?
- Who pays, and what are their specific assessment needs?
- How do you displace incumbent providers and ways of working?

2 **Understand the opportunity**

- **Automate:** Where can AI make your assessments faster, cheaper, or offer greater insights?
- **Assure:** Where does proving results can be trusted drive your value to customers?

3 **Build the thesis**

- What is your strategy based on the value proposition offered and the market you are in?
- What is the Total Addressable Market, and adjacent opportunities you can grow into?
- What are the commercial implications of this strategy?

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We bring structure, insight and judgement to support you in building a bespoke thesis

What you need to answer

1. Which market segments are growing, and how fast?
2. Where does your business sit in the assessment value chain?
3. Based on your positioning, how does AI impact your business?
4. How sticky are your customers and contracts?
5. What are the needs of your customers and how are you placed to serve them?
6. Where should you automate with AI, and where should you win on assurance?

How we help

Structure

We frame the problem

- Value chain and segment mapping
- A clear framework for the thesis
- A segmented view of the market growth and how your business will evolve

Insight

We find the evidence

- Interviews with awarding bodies, centres, employers and regulators
- Candidate, centre and customer surveys
- Competitor benchmarking, including AI capabilities

Judgement

We give a clear view

- A team focused entirely on education
- Lessons from other markets and countries
- Bespoke recommendations for your business

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This is supported by deep expertise and a track record in assessments and qualifications

25

years advising in education

40+

assessment and qualifications engagements

8

buy-side due diligences in assessment

8×

winner, Best Consultants in the Education Sector, Education Investor Awards

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