

The Collapse And Rebirth Of Online Learning And Professional Development - Josh Bersin

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Executive Summary

This article, authored by Josh Bersin, addresses the disruption of the global professional development and online learning market — estimated at over \$400 billion — driven primarily by the emergence of AI-native platforms. Bersin argues that the traditional 'publishing paradigm' of packaged courseware, which defined platforms such as Coursera, Udemy, LinkedIn Learning, and SkillSoft, is being rendered obsolete by AI-driven, personalized learning delivery. As evidence, he cites the declining stock valuations of publicly traded learning companies, the acquisition of Udemy by Coursera, and the statistic that 900 million users engage with ChatGPT weekly, with over 40% of interactions involving learning-oriented queries. Bersin introduces a five-level professional development maturity model — ranging from entry-level orientation to world-class expert — to contextualize how AI can dynamically address varied learner needs. He profiles several AI-native vendors including Arist, Sana, Uplimit, Workera, CodeSignal, Attensi, Docebo, and Cornerstone. The article concludes that L&D functions face significant cost reduction opportunities, citing a claimed 40% reduction in L&D spending achieved with unnamed client companies, while positioning Bersin's own Galileo platform as a primary beneficiary of this market transition.

Key Insights

1. The traditional course-publishing model for professional development — dominant since the late 1990s — is being disrupted by AI-native platforms that deliver personalized, non-linear learning experiences at scale.
2. Market consolidation signals structural decline among legacy online learning vendors: Udemy's acquisition by Coursera and plunging stock prices of publicly traded players reflect a fundamental demand-side shift rather than management failure.
3. ChatGPT's reported 900 million weekly users — with 40%+ engaged in learning-related interactions — represents the largest informal learning platform in history, achieved in approximately three years, dwarfing traditional L&D platform adoption.

Practical Takeaways

- L&D functions can identify cost reduction opportunities in areas such as translation, LMS metadata management, skills architecture, and role-based content publishing, as these tasks are increasingly automatable through AI tooling.
- Organizations evaluating professional development vendors can use the five-level expertise maturity model (entry, developing, expert-narrow, world-class, master) as a lens for assessing whether vendor offerings address the actual development stage of their workforce.

Critical Analysis

Strengths: The article draws on observable, verifiable market events — company acquisitions, stock price trends, and ChatGPT adoption data — to support its core disruption thesis. The five-level professional maturity model is a coherent and practically applicable taxonomy. The vendor landscape survey is reasonably comprehensive for a practitioner-facing piece. **Limitations:** The article is authored by the founder of the Galileo platform, which is promoted extensively throughout the text, creating a significant conflict of interest. The claimed '40% reduction in L&D spending' is unattributed, with no named companies, methodology, or timeframe provided — making it unverifiable. The article does not acknowledge potential limitations of AI-native learning platforms, such as accuracy risks, hallucination in technical training, or the continued value of human-facilitated learning for complex leadership development. OpenAI usage statistics (900 million weekly users, 40% learning interactions) are cited without a sourced study. The tone shifts between market analysis and promotional copy, particularly in sections referencing Galileo. The article does not engage with counterarguments or competing interpretations of the market trends described.

Organizational Practice

The article describes organizations using AI-native platforms to automate instructional design, translation, LMS publishing, skills taxonomy development, and career pathing. It also describes the practice of loading internal meeting content and company-specific documentation into AI learning platforms to personalize employee development experiences. One unnamed set of companies is described as having re-engineered manager training and HR support programs, reportedly achieving a 40% reduction in L&D spending alongside increased personalization.

Strategic Implications

The article's findings, if directionally accurate, suggest a structural reorientation of the L&D vendor market toward AI-native delivery, with implications for procurement strategies, vendor contract renewals, and internal L&D team composition. The described shift from content-as-product to experience-as-product implies that differentiation among learning vendors may increasingly rest on AI infrastructure quality and content depth rather than course volume. The convergence of AI agents with enterprise HR systems — as described — points toward potential integration of learning delivery with broader employee experience platforms. The five-level maturity model, if adopted, could influence how organizations segment learning investments by workforce expertise level rather than job role or function alone.

Validation Status: passed