From goat to GOAT N°36

LMS or LXP Is No Longer the Question: Learning Ecosystems Are Assembled and Run, Not Bought

From goat to GOAT series | January 2027 | GOAT LEARNING®

By moving the debate from which platform category to buy toward how the whole learning ecosystem is connected, governed and operated, organizations can turn a crowded technology market into one coherent experience for employees and one reliable source of skills data for the business.

For a decade, learning technology decisions started with a category. An LMS for compliance and administration. An LXP for experience and discovery. A TMS to run the business of training. Each had its own tender, its own owner and its own roadmap.

That map no longer matches the territory. In "The World of Corporate Training Lurches Toward Enablement" (9 March 2026), Josh Bersin writes that the traditional market categories of LMS, LXP, microlearning and employee experience platforms "are collapsing". Fosway Group is even more direct about one of them. Commenting on its 2026 9-Grid for Learning Systems, it states that "the LXP as a standalone category has effectively disappeared", and that personalised, skills-based recommendations, intuitive UX, intelligent search and seamless access to content are now baseline expectations for any modern learning system.

Categories blur, complexity does not

It would be easy to read this as a simplification. The evidence points the other way. Fosway's Digital Learning Realities 2026 finds that almost 75% of learning teams operate specialist learning platforms, and that after a phase of consolidation the range of best-of-breed solutions appears to be growing again. Brandon Hall Group, in its outlook published on 11 March 2026, predicts a move away from centralised, monolithic platforms toward a more interconnected ecosystem of tools, with AI agents playing a growing role in delivering learning in the flow of work. The same piece notes that about 30% of companies are still considering adding an LXP, even as the line between LXP and LMS continues to blur.

So there are fewer categories, but not fewer components. What used to be a choice between two boxes becomes a question of how many pieces work together, and how well.

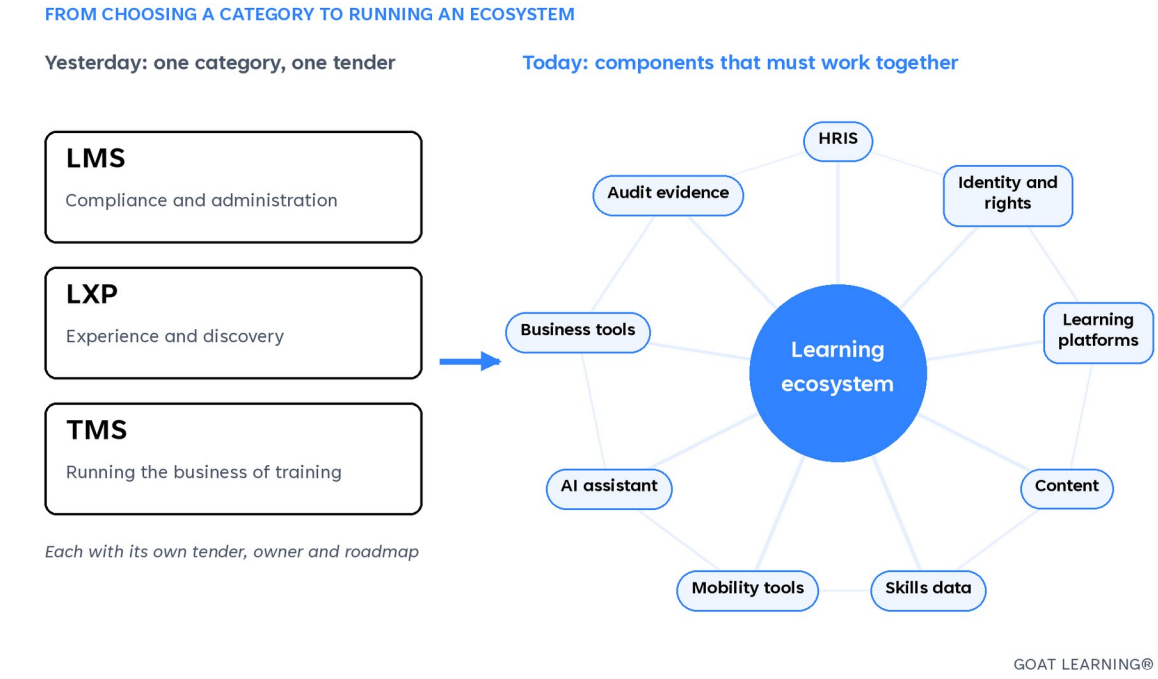


Figure 1. Fewer categories, not fewer components: from separate tenders to one connected ecosystem. Sources: Josh Bersin, 9 March 2026; Fosway Group, 2026; Brandon Hall Group, 11 March 2026.

Where the value moves

Fosway puts it plainly: traditional categories are becoming less useful as a guide to vendor capability. When that happens, the decisive factors move to places that never appear on a feature grid.

How identities and organisational data flow from the HRIS. How rights follow an employee who changes role or country. How a skills signal captured in one tool becomes usable in another. How an AI assistant knows which content a given person is allowed to see. How evidence of completion, certification or practice is kept when an auditor asks for it, three years later.

Josh Bersin describes the new posture well. In the world of enterprise AI, he writes, organizations become builders, not just buyers. A builder needs a target architecture, and someone who looks after it once the scaffolding comes down.

Skills make the wiring a business issue

This could remain a technical discussion if skills were not moving so fast. At its HR Symposium in Orlando on 26 October 2026, Gartner estimated that 34% of the skills required in 2025 will no longer be relevant by 2030, and that 32 million jobs will require redesign every year through 2031. On 11 November 2026, it described HR turning one third of its recruiting capacity inward, toward internal mobility, an effort that requires recruiting and talent management leaders to work together on workforce planning.

A skills-based organization depends on a chain. Workforce planning defines the need. The HRIS holds roles and people. Learning platforms build skills and keep the evidence. Mobility tools use that evidence to move people. When one link is not connected, the chain produces reports rather than decisions.

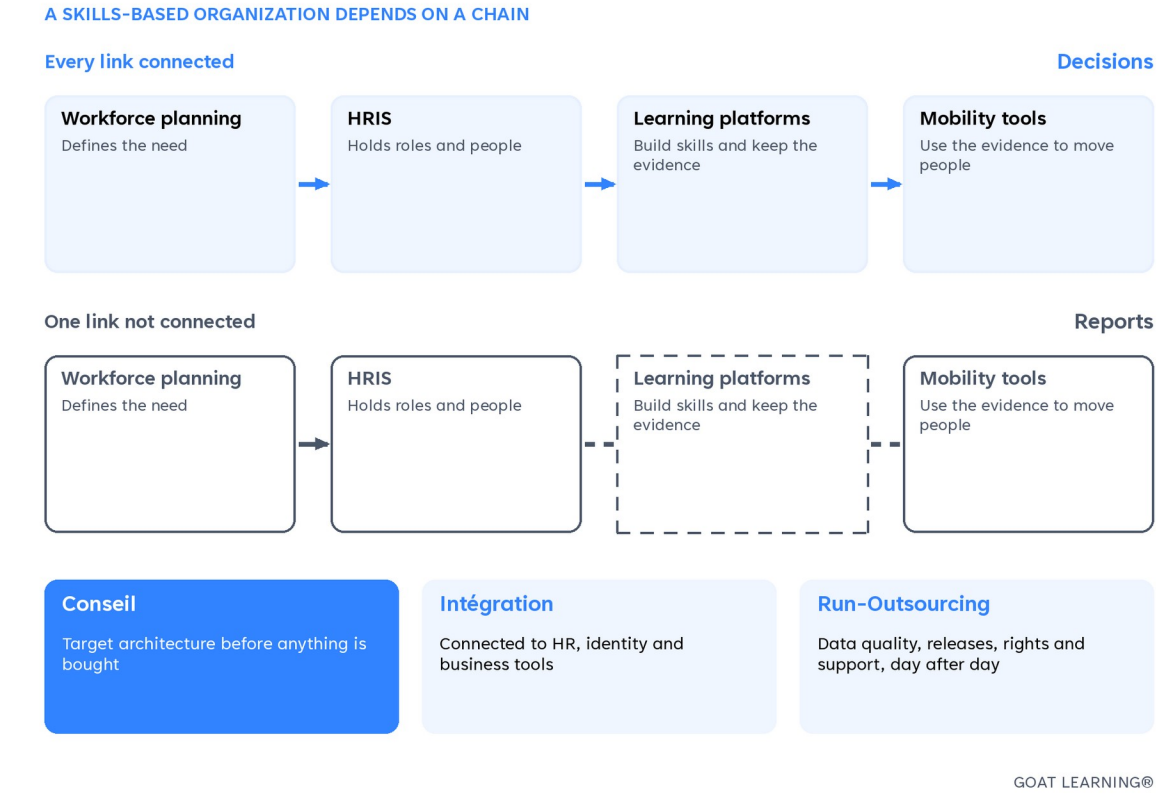


Figure 2. The skills chain: connected, it produces decisions; with one link missing, it produces reports.

Gartner also points to the downside. In Sydney on 17 November 2026, it reported that unmanaged skills atrophy can lead to a 24% decline in employee performance, while only two in five organizations have a strategy to address AI-driven skills atrophy. Its advice is to build that analysis into workforce planning, talent reviews and job redesign. Once again, this is a question of connected systems and shared data, not of a single platform.

Choosing still matters. Running matters more.

None of this makes vendor selection irrelevant. Fosway's Digital Learning Realities 2026 shows that L&D teams using a specialist platform are three times more likely to say their solution is fit for the modern workforce than those relying on the learning module of an HR suite, and that only one in three learning professionals consider their platforms fit for the modern workforce at all. Choices have consequences.

But the choice is now where the work begins, not where it ends. The organizations that get value from their ecosystem treat it as a living system. It is designed against a clear target architecture before anything is bought, which is the purpose of Conseil. It is properly connected to HR, identity and business tools, which is Intégration. And it is operated day after day by people who watch data quality, releases, rights and support, which is what Run-Outsourcing is for.

The next tender will still ask which platform to choose. The more useful question is who will make the whole ecosystem work on an ordinary Tuesday morning in year three.

Platforms are bought. Ecosystems are assembled, connected and run.

If you are reviewing your learning architecture or preparing a platform decision, and want to start from the ecosystem rather than the category, reach out to us at emilie@goat-learning.com.

GOAT LEARNING® supports organizations in structuring growth and building the skills to sustain it.

About GOAT LEARNING®

GOAT LEARNING® is a consulting, integration and outsourcing firm specialized in EdTech and Learning solutions (LXP/LMS/TMS).

Backed by more than 15 years of experience working with Global 500, CAC40 and SBF120 companies, it supports organizations in the design, selection, deployment and optimization of their learning ecosystems.

Positioned as a Trusted Advisor, GOAT LEARNING® combines technology/IT architecture expertise, a sharp understanding of Learning & Development challenges and a demanding standard of execution to turn learning investments into tangible drivers of upskilling, skills development, learner engagement and sustainable performance.

Leading Skills Based Organization initiatives with its clients, it helps them better align talent strategies, business priorities and learning programs.

With an ecosystem of more than 24 strategic partnerships and 250+ content, technology and service providers, GOAT LEARNING® pursues a simple ambition: to make learning a strategic, measurable asset and a value accelerator for the business.

Sources

Josh Bersin, "The World of Corporate Training Lurches Toward Enablement", 9 March 2026. https://joshbersin.com/2026/03/the-world-of-corporate-training-lurches-toward-enablement/

Fosway Group, "Upskilling and AI are top priorities for L&D" (excerpt from the 2026 Fosway 9-Grid for Learning Systems, published February 2026), March 2026. https://www.fosway.com/research/next-gen-learning/upskilling-ai-priorities/

Fosway Group, "AI is blurring learning market boundaries", June 2026. https://www.fosway.com/research/next-gen-learning/learning-market-boundaries/

Fosway Group, "Digital Learning Realities 2026: Ecosystem and experience", August 2026. https://www.fosway.com/research/next-gen-learning/digital-learning-realities-2026-ecosystem-and-experience/

Brandon Hall Group, "The Intelligent Learning Organization: Trends, Challenges and Predictions for the Year Ahead", 11 March 2026. https://brandonhall.com/the-intelligent-learning-organization-trends-challenges-and-predictions-for-the-year-ahead/

Gartner, "Gartner HR Symposium/Xpo, North America: Day 1 Highlights", Orlando, 26 October 2026. https://www.gartner.com/en/newsroom/press-releases/2026-10-26-gartner-hr-symposium-xpo-orlando-day-1-highlights

Gartner, "Gartner Identifies Four Key Trends Shaping Organizational Talent Strategies Today", 11 November 2026. https://www.gartner.com/en/newsroom/press-releases/2026-11-11-gartner-identifies-four-key-trends-shaping-organizational-talent-strategies-today

Gartner, "Gartner HR Symposium/Xpo 2026 Australia: Day 2 Highlights", Sydney, 17 November 2026. https://www.gartner.com/en/newsroom/press-releases/2026-11-17-gartner-hr-symposium-australia-day-2-highlights