edX Enterprise

THE STATE OF ENTERPRISE LEARNING 2026

Closing the capacity-capability gap



About the report

This report is based on the results of an online survey of approximately 500 verified L&D and workforce-strategy leaders, as well as in-depth interviews with 10 verified L&D experts from the NewtonX network. Fielding of quantitative and qualitative data took place from June 2026 to July 2026.

Methodology

Quantitative surveys

Online survey of n=507 verified L&D and workforce-strategy leaders with responsibility for or oversight of L&D. Fielding occurred from June 2026 to July 2026.

Qualitative interviews

In-depth interviews with 10 verified L&D experts from NewtonX's network: Three pre-quantitative to inform the survey, and seven post-quantitative follow-ups with respondents from the survey.

Respondent role and company details

Respondent workforce capability profile

- Learning & Development: 46%
- General HR: 38%
- C-level HR: 16%

Company size

- Mid-market (500-5,000 employees): 39%
- Large enterprise (>20,000 employees): 33%
- Enterprise (5-20,000 employees): 28%

Respondent seniority

- Director/head: 43%
- C-suite/VP: 35%
- Manager: 22%

Company region

- Americas: 43%
- Asia-Pacific: 25%
- Europe, the Middle East and Africa: 32%

Executive snapshot

New research and insights from 500 global learning leaders

Learn how organizations are navigating AI transformation: what's working, what's standing in the way, and what field leaders are doing to pull ahead.



AI TOPS THE 2026 WORKFORCE AGENDA

83% name AI skills their #1 workforce priority for the year, ahead of every other capability.



BUT CAPABILITY HAS NOT KEPT PACE

29% have built mature AI capability within their companies.



CONFIDENCE IS MIDDLING

74% are not highly confident their L&D function can deliver what the workforce needs.



AND FEW HAVE A STRONG MANDATE

78% lack a strong mandate to lead AI upskilling, meaning executive support, clarity, and resources together.



INTEGRATION SEPARATES AI TRANSFORMATION LEADERS

2.7x the rate at which AI transformation leaders integrate AI and leadership development versus the field. Building the two together sets the best apart.



FEW BUILD AI AND LEADERSHIP SKILLS TOGETHER

85% do not develop AI and leadership as one connected effort. The two priorities most tied to an AI transition run on separate tracks.



AI TRANSFORMATION LEADERS MEASURE FAR MORE DEEPLY

1.6x as many success measures tracked by AI transformation leaders than other organizations.



AI TRANSFORMATION LEADERS ARE BUILT ON A STRONGER MANDATE

3.9x as likely as the field to hold a strong mandate, the single biggest differentiator between AI transformation leaders and everyone else.

Introduction

How are organizations building the workforce for an AI-driven era? Most L&D functions are highly attuned to the demand for AI upskilling, and they've moved AI to the top of their workforce agenda accordingly. AI is the number one workforce capability priority for 2026, named by 83% of L&D leaders, yet fewer than a third have been able to build the models, systems, or structures they need to realize that agenda. As a result, most organizations are left trying to close a widening gap between their aspirations and their reality.

Most, but not all. A select few AI transformation leaders have succeeded in closing that gap.

Their experiences tell us that L&D leaders must secure a strong and clear executive mandate that is communicated across the org. A strong mandate is by far the largest driver of leader status, but 78% of organizations don't have one.

In addition to mandate, the organizations pulling ahead treat AI upskilling and leadership development as a single integrated effort and prove impact through measurement, while the wider field runs them apart.

We partnered with NewtonX, a leading global B2B research firm, to go straight to the people running enterprise learning. We surveyed 500 CHROs, CLOs, and L&D leaders across key industries worldwide, at organizations of 500 or more employees, to learn what's really happening inside their functions and how their experiences can help you craft a learning strategy that brings your goals into sharp focus.

The paradigm shift

How AI has reshaped the enterprise agenda

For today's learning leaders, AI skills aren't just a priority. They're **the** priority.

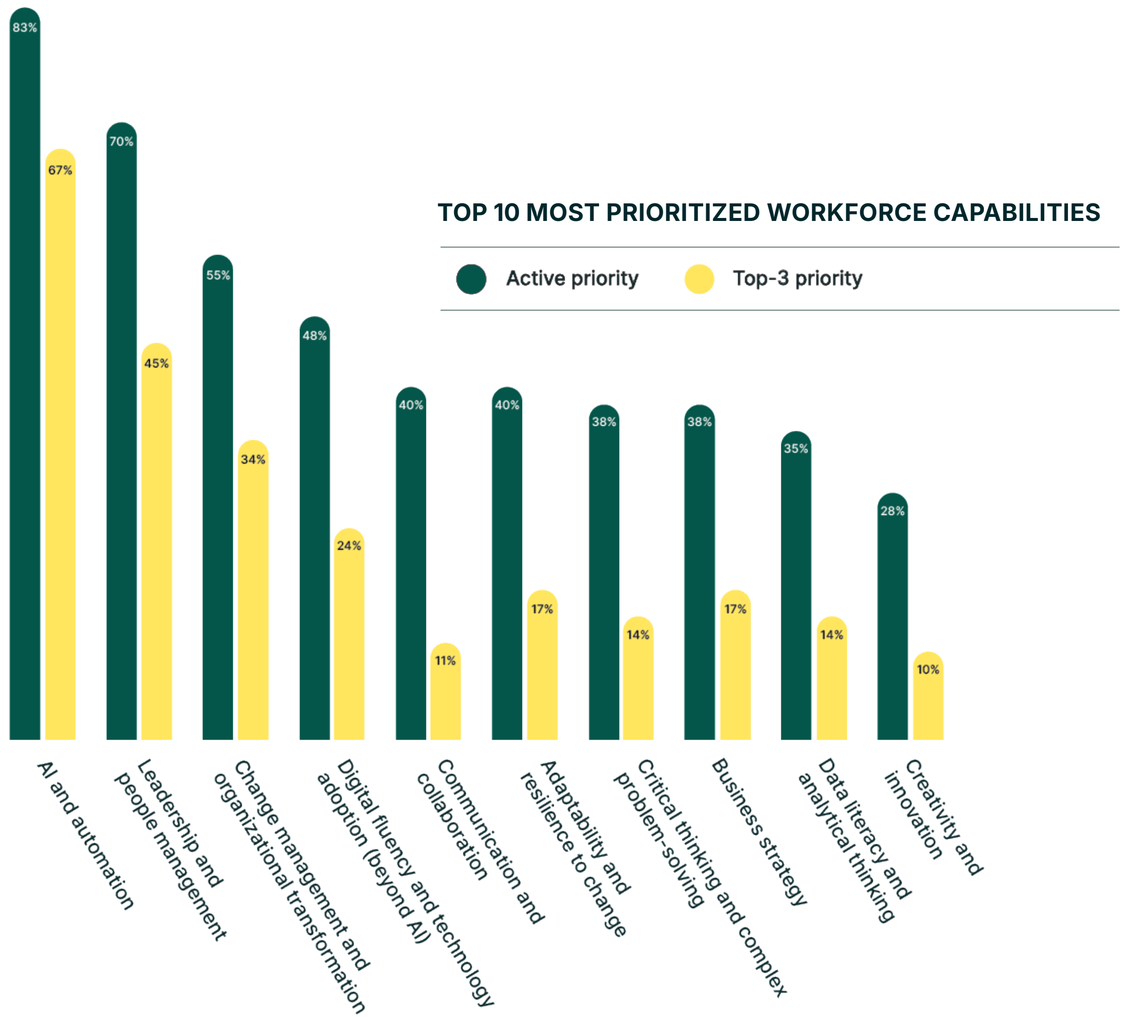
The vast majority (83%) of L&D leaders consider AI an active priority, and 67% rank it among their top three capabilities. Leadership capabilities are close behind, an active priority for 70% of L&D leaders.

AI is the clear upskilling priority

Most workforce capability leaders include AI skills as one of their active priorities for this year, and roughly two-thirds rank it as a top-three priority.

Here's where things get interesting: Two of the three top leadership skills leaders value most — helming AI-informed decisions and strategies, and understanding AI well enough to lead users — are AI focused.

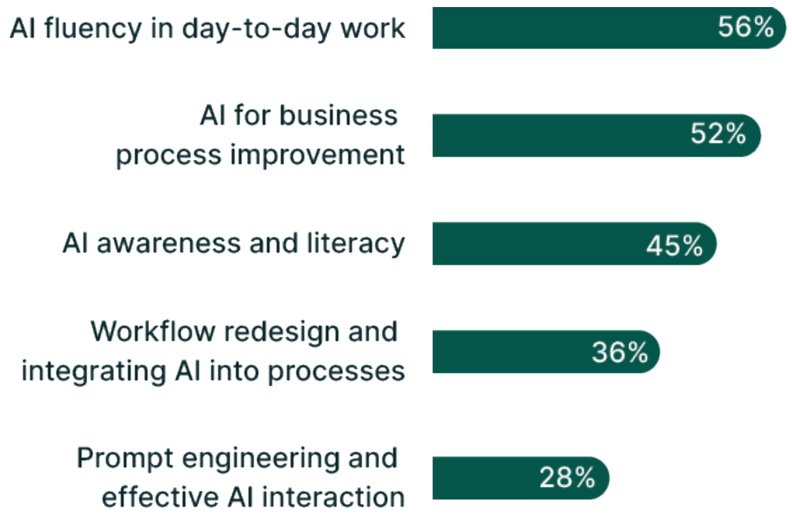
The takeaway? AI has moved to the top of the agenda and it has redefined the way we view other capabilities.



AI skills center on applied fluency

AI upskilling priorities center on fluent use in everyday tasks, organization-wide process improvement, and well-rounded literacy on what AI is and how it works.

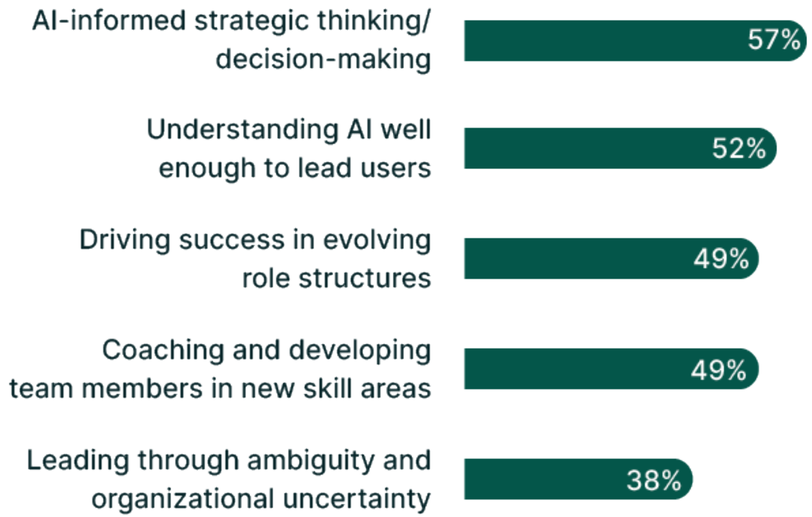
TOP 5 AI SKILL PRIORITIES



Top leadership skills emphasize AI context

The two most prioritized leadership skills are AI focused. The others help teams navigate change and learn new skills, things that benefit AI adoption and transformation.

TOP 5 LEADERSHIP SKILL PRIORITIES



AI is disrupting skill priorities, but most L&D functions are adjusting, not redesigning, their agendas.

Most organizations (70%) say AI has moderately influenced or significantly shifted their capability priorities over the past 12 to 18 months. Yet only 14% say it has fundamentally reshaped them.

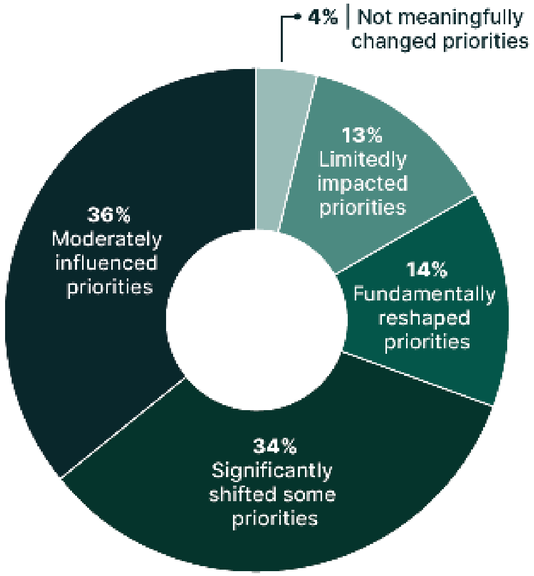
The distinction is important, because it separates the organizations that simply recognize AI as a priority — and react to that imperative within the confines of existing agendas — from ones that **proactively integrate AI literacy and enablement strategies** into the fabric of their learning models.

Critically, the proactive organizations aren't just upskilling en masse. They're working with functional leaders to map specific AI capabilities to specific roles and business units, which helps them understand where development interventions are most needed.

In other words, most workforce capability leaders are incrementally adjusting their agendas by adding AI. The leaders are going deeper, and redesigning those agendas — at enterprise-wide and function-specific levels — around AI.

AI'S IMPACT ON WORKFORCE CAPABILITY PRIORITIES

While most leaders say AI has had some level of influence on their priorities, they're treating it as an add-on to existing agendas.



Source: Internal Q3 Operations Data. Figures do not total 100% due to rounding. For full raw data or methodology questions, contact the edX Enterprise team.

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Demand has changed

83%

NAME AI SKILLS A TOP WORKFORCE CAPABILITY.

...but capacity is lagging.

29%

HAVE BUILT MATURE AI CAPABILITIES.

THE TAKEAWAY:

AI capability needs are outpacing organizational capacity

L&D leaders know AI matters, but most have responded by adding to rather than rebuilding their learning models and agendas. That response doesn't indicate a lack of willingness, skill, or talent; it points to a disparity between what workforce capability leaders **recognize as a priority** and **what they're able to build to support that priority.**

In fact, just 29% of organizations have built the mature AI capabilities they need to meet the rising demand for AI upskilling.

Maturity and confidence are the hallmarks of an AI transformation leader

Just 15% of organizations qualify as AI transformation leaders. These leaders are well distributed across industries, including energy, financial services, healthcare and pharmaceuticals, manufacturing and professional services. But they all meet two key criteria:

High AI maturity

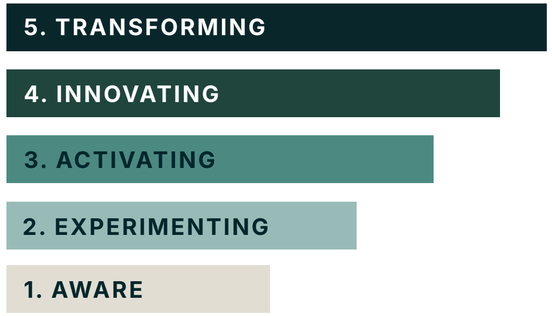
30% EXHIBIT HIGH AI MATURITY

They're further along in their journey to build AI capabilities, and actively innovating or transforming L&D agendas to match capability demand.

Designated as level 4 or higher on the maturity ladder.

THE AI-MATURITY LADDER

1-5 stages, 5 is the most mature



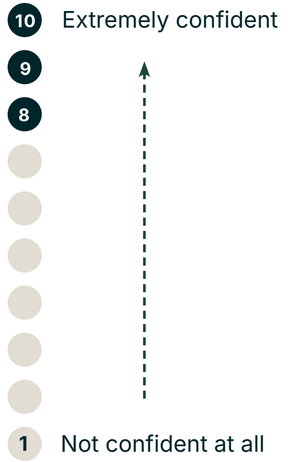
High confidence

26% EXHIBIT HIGH CONFIDENCE

They're highly confident that their L&D function is able to effectively identify and, critically, deliver on the capabilities the workforce needs.

Designated as a level 8 or higher on the confidence scale.

CONFIDENCE IN L&D TO DELIVER ON UPSKILLING GOALS

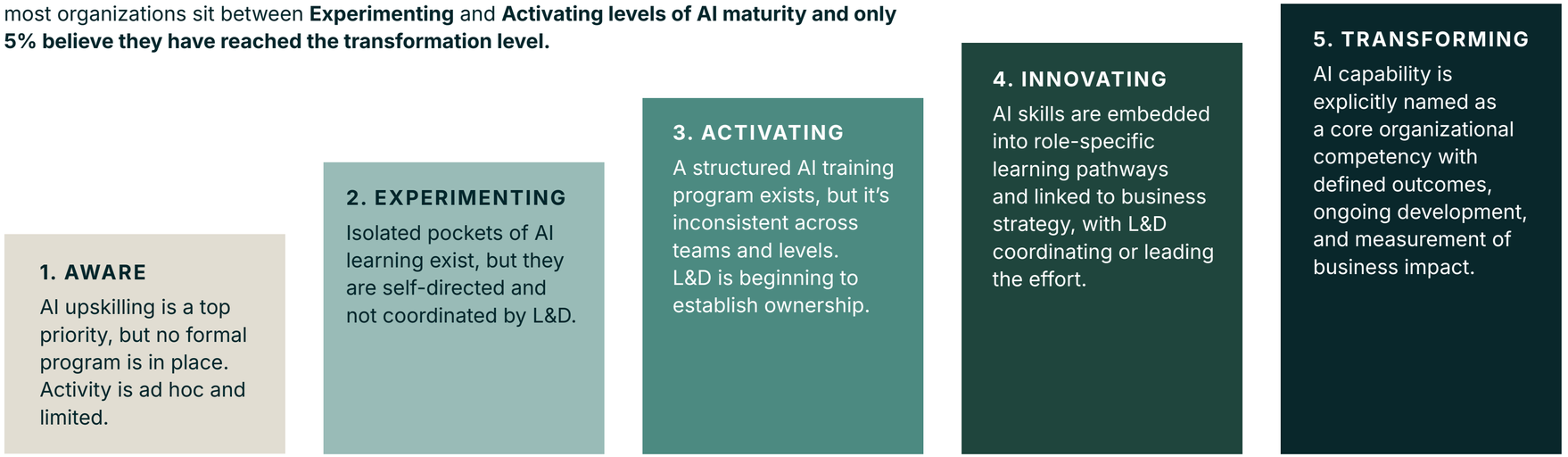


15%

HIGH AI MATURITY AND HIGH CONFIDENCE

Where do you fall on the AI maturity scale?

Organizations at levels four and five are considered high maturity. The research highlighted that most organizations sit between **Experimenting** and **Activating levels of AI maturity and only 5% believe they have reached the transformation level.**



5% of organizations | **32% of organizations** | **33% of organizations** | **25% of organizations** | **5% of organizations**

Most organizations have started but are still in the early stages of building mature AI capabilities.

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The mandate gap

Why support matters more than ownership

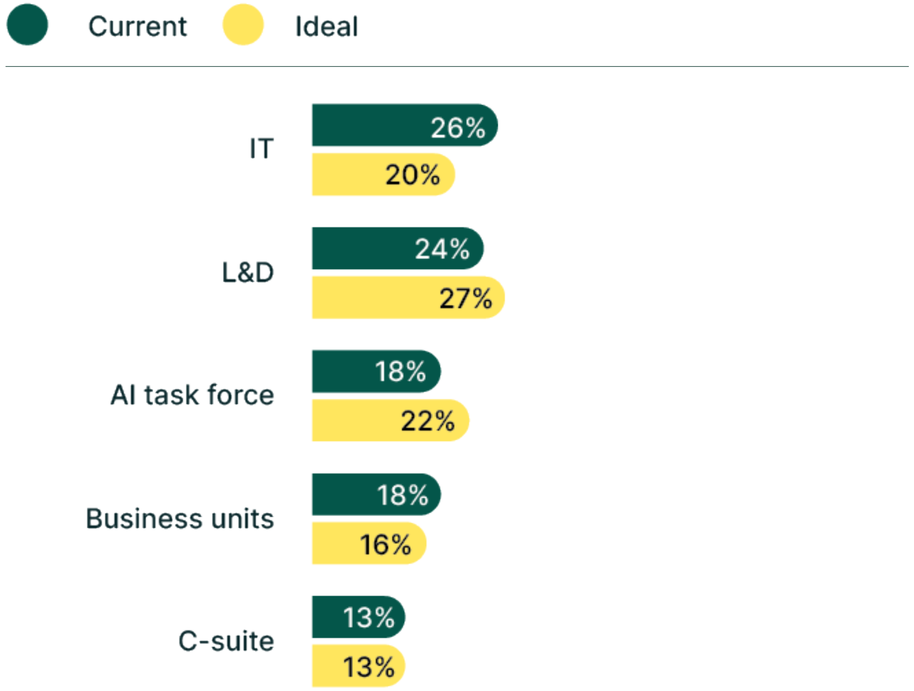
What accounts for the mismatch between capability and capacity? At first glance, the answer seems to hinge on ownership.

In most organizations, AI upskilling ownership is highly fragmented, distributed across multiple teams and functions. IT typically holds the largest ownership share, with L&D close behind. Workforce capability leaders want L&D and task forces to own more, and other functions tend to agree. But how much does ownership really matter?

Who owns AI upskilling? Who should?

Four functions — IT, L&D, AI task forces, and business units — each own between 18% and 26% of AI upskilling. IT owns the most (26%), but L&D leaders want that to shift.

DISTRIBUTION OF OWNERSHIP FOR AI UPSKILLING: CURRENT VS. IDEAL



Ownership seems important, but mandate is the true driver of effective AI transformation

We analyzed how well four levers predicted success in AI upskilling:



1. Integration of AI and leadership upskilling: The degree to which the organization develops these skills in conjunction with one another.



3. Mandate strength: The extent to which executive leadership empowers L&D to drive AI upskilling.



2. L&D ownership: Whether ownership sits with L&D, another function, or multiple functions.



4. Measurement depth: How frequently, thoroughly, and thoughtfully the L&D function assesses the performance of AI upskilling initiatives.

Of the levers tested, a strong leadership mandate is by far the strongest indicator of whether an organization is an AI transformation leader.

It accounts for 59% of the levers' combined influence, nearly twice that of success measurement (34%). Ownership, by contrast, matters far less than we think.

ONE SENIOR HR LEADER ON WHAT ALLOWED THEIR ORGANIZATION TO ACHIEVE GROWTH IN AI DEVELOPMENT:

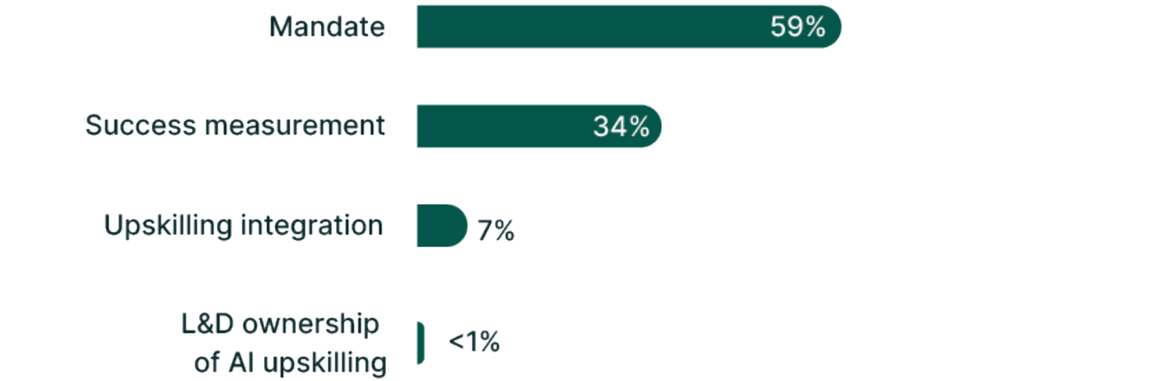
“A very, very strong leadership mandate. The C-suite understood the strategic importance of driving this through a central team like L&D… We’ve not been seen as a function (just HR). We’re seen as representatives of the C-Suite.”



The takeaway?

For AI transformation leaders, the most powerful ingredient for success is an **executive-backed mandate** that builds **organization-wide confidence** in L&D's ability to deliver on workforce needs.

KEY DRIVERS OF AI TRANSFORMATION LEADERSHIP

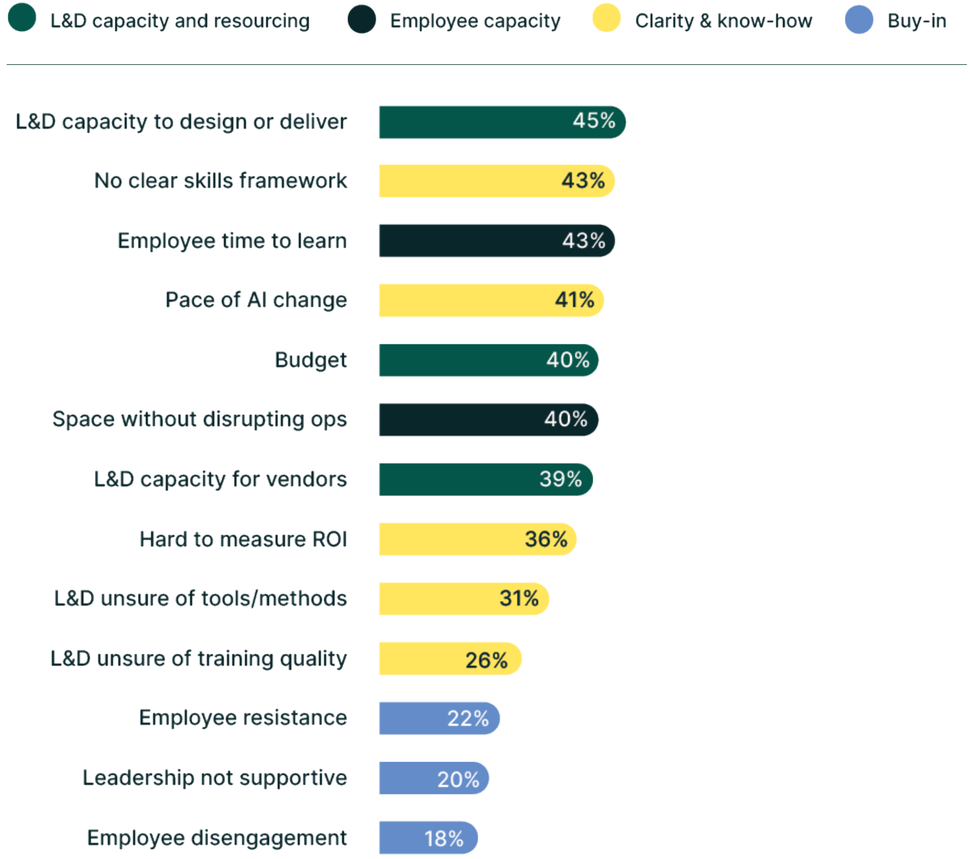


Without a strong mandate, capacity and direction — not willingness — become the main blockers to progress

- L&D functions don't have the budget or capacity to design materials, deliver training at scale, develop frameworks for which skills to build or which methods to use, or measure progress.
- Employees who need training don't have time or space to complete training without disrupting operations.
- Employees and leadership teams don't have a clear understanding of why they should buy into, support, or participate in AI upskilling efforts — so they opt out.

The upshot: Workforce capability leaders have the skills, the talent, and the drive. What they often lack is the mandate they need to realize their goals.

TOP BARRIERS IN BUILDING WORKFORCE AI CAPABILITY



What does a strong mandate look like?

The strongest mandates comprise three key components:



Enthusiastic C-suite support. Executive leadership expects L&D to own AI upskilling, and they clear the path forward.



Deep clarity on skill requirements. Workforce capability leaders know which specific AI skills their organization needs and why.



Ample financial and personnel resources. The driving function has the budget and staffing resources to facilitate training and skill development.

But few L&D functions — less than 30% — have a strong mandate for AI upskilling. In those cases, capacity and direction, not a lack of willingness, become the main barriers to progress. In the next section, we'll take a closer look at the organizations that are pulling ahead, and what they're doing to close the capacity-capability gap.

Earning a mandate when executives are not onboard

L&D earns a mandate by bringing a business case in leadership's own language, using projected business outcomes, concrete data, and a clear strategic imperative. Demonstrate the upside of AI upskilling, and of L&D owning the task, then convert demonstrated impact into an explicit mandate.

“I would show them what our strategic imperatives are, what our results are, and the possibility of what they could be if we leveraged AI effectively.”

– GLOBAL HEAD OF EXECUTIVE DEVELOPMENT, FINANCIAL SERVICES, US

The competitive edge

What truly distinguishes the leaders is a foundation built on mandate, measurement, and integration.

This elusive combination of confidence and maturity isn't an accident, nor is it out of reach for other organizations. The capability-capacity gap doesn't mean an organization's L&D function is underperforming — **it means they're under-mandated.**

We tend to focus on the how and the what of AI capability. What training programs should we use? Who owns upskilling? Which formats and tools are best? Those choices matter, but the real difference lies in the foundation. Let's break it down.



The AI leader playbook

AI transformation leaders' foundation includes three levers: mandate, measurement, and integration of AI upskilling with leadership development.

1

Secure a mandate with a clear framework to follow

Acquiring a strong mandate backed by executive support, adequate resources, and clarity is the dominant lever to become an AI transformation leader. The key term here is "strong." Most functions are missing at least one of the three components needed for a strong mandate, and closing that gap is the highest-leverage move.

LEADERS ARE 3.9X AS LIKELY TO HAVE A STRONG MANDATE.

Key objective: Translate the mandate into a formal plan: what skills to build, for which audiences, and in which formats, to provide a clear framework for expectations and the definition of success.



2

Integrate AI and leadership upskilling efforts

Leaders treat AI upskilling and leadership development as a single integrated effort, not two distinct goals on parallel tracks. By connecting AI and leadership development, they equip contributors and functions with complementary skills that make full AI transformation possible.

LEADERS INTEGRATE AI UPSKILLING WITH LEADERSHIP DEVELOPMENT AT 2.7X THE RATE OF THE FIELD.

Key objective: Target that integration by audience: everyone needs baseline AI fluency, but managers and executives also need to think strategically about where AI applies and how to lead AI-forward teams and coach others. Empower leaders to lean into AI-complementary capabilities that help their people know where and when to apply AI most strategically, not just how to use it.

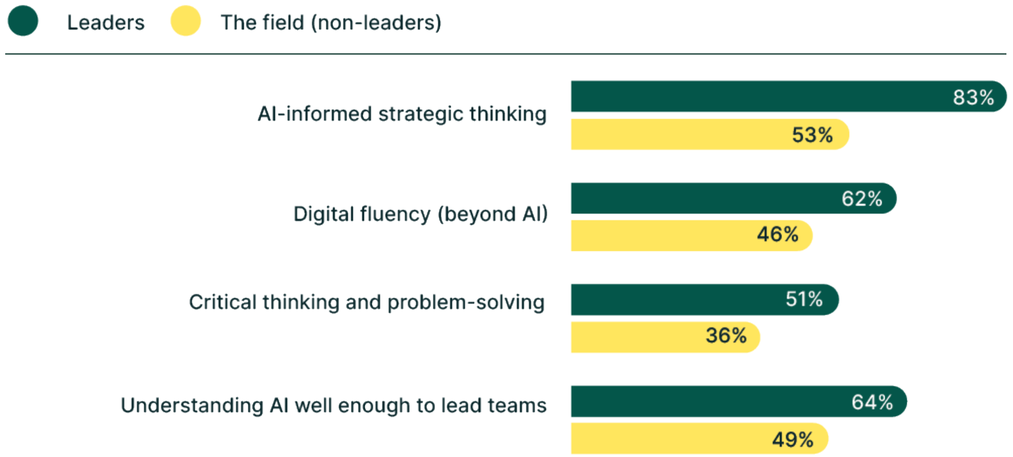
UPSKILLING SPOTLIGHT:

What leaders do differently

1. They value AI-informed strategic thinking much more than the broader field.

They prioritize skills that complement AI, like strategic thinking, far more than others.

SKILLS AND CAPABILITIES THAT AI TRANSFORMATION LEADERS PRIORITIZE MORE



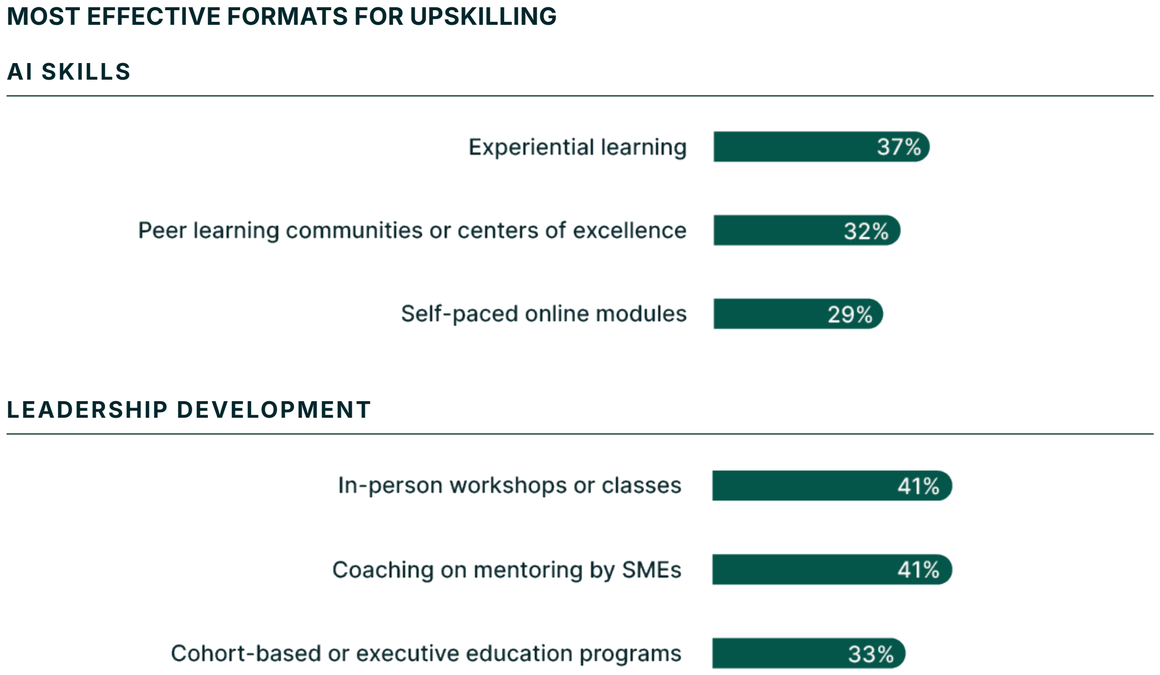
Percentage of respondents reporting that they prioritize a skill or capability, and how much more leaders prioritize them.

2. They diversify their learning formats.

AI transformation leaders and the field rank the same formats as effective, and no single format consistently separates the two. AI transformation leaders do use more formats, but they do so strategically.

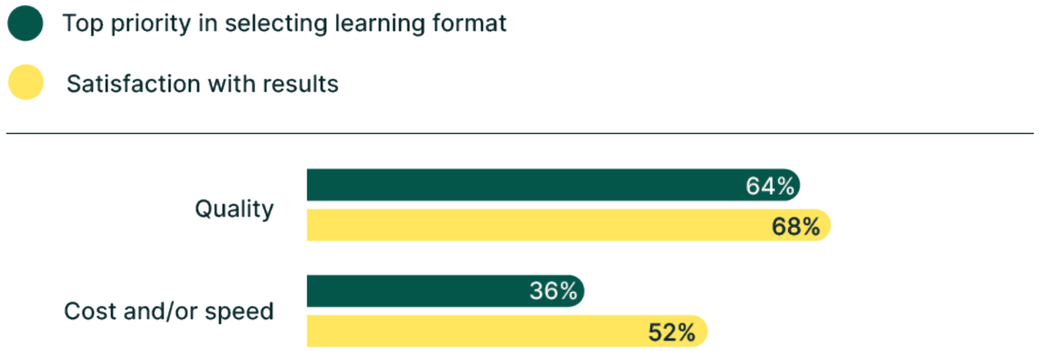
This approach isn't rooted in a more-is-more mindset; it's the natural consequence of having already identified function-specific learning objectives. Because they know which audiences need which skills, they can make informed and precise decisions about the combination of formats that works best in each instance.

MOST EFFECTIVE FORMATS FOR UPSKILLING



3. They tend to opt for quality over speed or cost.

AI transformation leaders are somewhat more likely to prioritize quality (72% vs. 62%) and are far more satisfied with their results (79% vs. 59%).





3

Measure learning impact deeply and broadly

Leaders assess the success of their learning programs far more deeply than the rest of the field, tracking progress and impact at multiple levels. That includes downstream outcomes that tie to business results and organizational priorities, not just short-term metrics.

LEADERS TRACK 1.6X AS MANY MEASURES AS THE REST OF THE FIELD.

Key objective: If you haven't already, start with standard L&D outcome measures like completion rates and learning hours. Then, graduate to downstream metrics like new skill application, operational efficiency, and business results to stay on the right path and reinforce your mandate.



Where leaders and non-leaders align

While the main goal of this section is to spell out what leaders are doing differently, it can be helpful to understand where their instincts line up with the broader field, so you know where to put your time and resources.



HOW THEY MATCH SKILLS TO THEIR AUDIENCE

AI upskilling is aimed broadly across all employees (35%). When organizations do target, they typically prioritize managers (19%) and senior leaders (14%) over more junior roles. Almost two-thirds (59%) of leadership development concentrates on people managers and executives, leaving many early- and mid-career contributors without coaching for future leadership roles.



HOW THEY SELECT EXTERNAL LEARNING PROGRAMS

When selecting external learning programs, leaders and non-leaders alike primarily weigh fit, outcomes, and instructor expertise. Leaders do tend to value measurable outcomes and instructor expertise a little more than the rest of the field, but they otherwise use the same selection criteria.



HOW THEY VALUE UNIVERSITY AFFILIATION

Almost half (44%) of respondents prioritize university affiliation when selecting providers. Leaders do place a higher premium on university affiliation, but we saw the most pronounced differences along regional and industry lines. More than half of respondents from the Asia-Pacific region (57%), as well as those from energy (56%) and financial services (55%) and sectors, named university affiliation as important or essential.



The AI Capability Blueprint

Leaders are not running different mechanisms; they are working from a clearer plan. A strong mandate tells them which skills to build and for whom, and gives them the capacity to build them. Measurement and integration compound the gains on top.

YOUR STAGE	YOUR STATUS QUO	YOUR NEXT STEP
Aware	Just getting started: mandate is very weak, with only the first signs of clarity. Few track multiple success measures, many measure nothing. AI and leadership upskilling integration is minimal and IT is the primary owner.	Establish clarity
Experimenting	Grassroots activity without real backing: clarity forms, but mandate and executive support is weak. Measurement is shallow, primarily learning completion and engagement metrics. No real change in integration and ownership.	Win executive support
Activating	An inflection point: Mandate earns strength, led by clarity and executive support, though resourcing lags. Measures expand, focusing on skill acquisition, behavior change, and business results. Upskilling integration begins, and primary ownership shifts from IT towards L&D and AI task forces.	Unlock resources
Innovating	Mandate strengthens sharply, driven by gains in resourcing and clarity. Most have a full mandate. Measurement deepens into operational outcomes and business results. AI and leadership upskilling becomes slightly more fully integrated, but no major change to ownership.	Crystallize mandate
Transforming	A strong, well-resourced mandate, with extensive measurement feeding ROI conversations. Executive support plateaus, focus turns to sustaining and measuring what's been built. Integration sees little change from prior stages, but AI task forces become a more common owner.	Sustain, measure, and evolve

Conclusion



Organizations know where they need to go, but most — including ambitious, established, and highly skilled L&D functions — haven't built the means to get there. This is the defining tension of the present moment. Those that have closed the gap have shown us that it's not a matter of luck, either.

These leaders are evaluating their programs on the basis of rich downstream metrics, and they're taking a full-circle approach to skill development by integrating leadership and AI skills — a combination that prepares the entire workforce to thrive in an AI-powered future.

Above all, it comes down to the intentional and unwavering pursuit of a strong executive mandate, one that continuously foments organization-wide support of L&D as the driver, not just the owner, of AI upskilling.

About edX Enterprise

edX Enterprise partners with the world's top-ranked institutions to help companies, universities, and governments build the capabilities to meet the defining challenges of their time. edX is the global online learning platform that fuels the world's ambition. edX was developed in 2012 by Harvard and MIT to make the world's best education available to everyone. As a part of 2U, LLC, edX connects millions of ambitious learners to courses and programs that meet every professional moment.

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Not sure where to start?

Speak to one of our team members to build a skills framework based on the capabilities AI demands across leadership and the broader workforce.

Let’s chat!