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# October 18 - October 24, 2025

## Executive Summary: Overview of Dominant Trends

The week of October 18-24, 2025, confirmed several structural shifts in the global artificial intelligence (AI) ecosystem: a historic concentration of capital in foundational infrastructure, mounting friction in the implementation of landmark regulation, and a critical scientific breakthrough positioning AI as a generator of novel, validated hypotheses. Venture funding confirmed AI's irreversible dominance, claiming 51% of all venture capital deployed in 2025 year-to-date—the first time AI startups have captured more than half of annual funding—despite a sharp contraction in overall deal volume.<sup>1</sup> This investment surge signals a focus on efficiency and scaling. Simultaneously, the regulatory landscape was defined by the divergence between AI ethics as a competitive advantage (Microsoft) and a compliance bottleneck (EU AI Act).<sup>2</sup>

### Key Highlights of the Week

- **Capital Acceleration:** Mega-rounds totaling billions of dollars, led by Crusoe Energy Systems (\$1.38 billion), prioritized the energy and data center backbone for AI, signaling that reliable computation capacity—not purely model sophistication—is the current primary market constraint.<sup>4</sup>
- **Scientific Milestone:** Google DeepMind and Yale University announced a validated discovery pathway in cancer immunotherapy using the C2S-Scale 27B model, officially transitioning AI's role from diagnostic assistance to the generation of novel, experimentally tested scientific hypotheses.<sup>5</sup>
- **Regulatory Implementation Risk:** The European Association of Medical devices Notified Bodies (Team-NB) warned that a critical shortage of conformity assessment

organizations threatens to "massively hinder" the implementation of the EU AI Act for high-risk systems, potentially delaying market access until and beyond the August 2027 deadline.<sup>3</sup>

- **Ethical Schism:** Microsoft AI CEO Mustafa Suleyman publicly distanced the company from competitors like OpenAI and Grok by rejecting the creation of simulated erotica AI services, branding it a "very dangerous" path that risks creating a "new axis of division" between humans and machines.<sup>2</sup>

## Key Takeaways for Small and Medium-Sized Businesses (SMBs)

AI adoption among SMBs is now near-universal, with 88% of firms reporting the use of AI tools across their operations, deploying an average of 4.8 tools per business.<sup>7</sup> This high degree of integration is directly correlated with widespread optimism, as 84% of small business owners express confidence in their 2025 year-end performance.<sup>7</sup> The critical shift observed this week involves the democratization of high-end AI capabilities through optimized infrastructure and accessible subscription models, which transforms AI from a growth tool into a core mechanism for operational resilience and measurable cost management.<sup>8</sup>

### The Democratization of Enterprise-Grade Compute via Edge and Efficiency

The challenge of deploying high-performance AI systems, typically reserved for large enterprises due to cost and complexity, is rapidly dissolving. Azure AI, for instance, has introduced edge computing solutions designed to process data locally on business premises.<sup>8</sup> This localized processing capability neutralizes a key disadvantage for SMBs, as it significantly reduces latency and lowers the operational costs associated with constant data transit to centralized hyperscale cloud resources. Consequently, businesses can implement real-time analytics and automated decision-making systems more affordably.<sup>8</sup> The availability of these efficient, localized compute resources and low-cost subscriptions (such as HubSpot's AI Marketing Hub starting at \$25 monthly) accelerates the return on AI investment for even micro-businesses.<sup>8</sup> The evidence confirms AI adoption is functioning as an immediate cost-saving measure, with IT workflow automation, specifically using AI for system monitoring and maintenance tasks, reducing technical support costs by an average of £800 monthly for typical small businesses.<sup>8</sup>

### The Migration from Tactical Generation to Strategic Agentic Workflow

The market is moving beyond providing simple generative tools (which require human input for every task) toward delivering Agentic Workflow Orchestrators, which manage entire processes autonomously. New tools like Zapier AI exemplify this transition by focusing on automating entire workflows, such as sending invoices or updating CRM records, based solely on natural language descriptions, and running these tasks seamlessly in the background.<sup>9</sup> Current common uses already include business research, content creation, and financial management.<sup>7</sup> For SMBs, this means AI is becoming a virtual employee, transforming repetitive administrative tasks like client onboarding, summarization of long content, or drafting structured documents (via Notion AI) into fully automated pipelines within established workspaces.<sup>8</sup> This shift allows small firms to scale capacity without directly increasing headcount, bolstering the productivity that underpins their confidence in 2025 performance.

## Universal Adoption Despite Residual Pain Points

Despite the high adoption rate of 88% and general satisfaction (73% of users report benefits), the adoption phase is transitioning into a maturation phase. Evidence suggests that 30% of existing AI users report additional "pain points they wish AI could address".<sup>7</sup> This persistent gap indicates that current AI tools, while highly effective for generic tasks, still lack the necessary domain-specific specialization or seamless, deep integration required for complex, bespoke SMB problems. This unmet demand signals a significant market opportunity for specialized vertical AI startups—focused on hyper-niche, end-to-end solutions—to offer utility that exceeds the generic functionality of current multimodal tools.

SMB AI Adoption and Tool Utility		
Metric/Insight	Data Point (2025 Survey/Deployment)	Source Snippet
SMB Confidence (Year-End Performance)	84% Express Confidence	7
Overall AI Tool Adoption Rate	88% of small businesses report using AI tools	7
Average Number of Tools Used	4.8 AI tools across operations	7
Cost Reduction via IT Automation	Average savings of £800 monthly for typical small businesses	8
Lead Weekly Use Case (Public)	Information-seeking doubled, now leading weekly use case (24%)	10

**Emerging Player Call-out: HubSpot’s AI Marketing Hub and Agents24x7.** These platforms represent the new wave of low-cost, high-utility automation, offering comprehensive marketing funnel management and extensive autonomous task capabilities (over 100) at price points accessible to budget-conscious SMBs.<sup>8</sup>

**Takeaway:**

1. SMBs must prioritize agentic workflow integration over isolated tool usage to maximize operational leverage.
2. Low-cost edge computing and subscription models have made high-ROI automation accessible, lowering technical support burdens significantly.
3. The next competitive front for SMBs will be optimizing internal documentation and marketing alignment through specialized, budget-conscious AI hubs.<sup>8</sup>

## **Global AI Policy and Governance**

Global governance efforts continued, notably in health through the AIRIS Incheon 2025 forum<sup>11</sup> and regulatory clarification regarding the EU AI Act's serious incident reporting.<sup>6</sup> However, these efforts were overshadowed by mounting implementation hurdles and a foundational ideological schism concerning ethical guardrails among major technology leaders. This divergence highlights a global race where jurisdictions are choosing between stringent control and accelerated innovation, with the US pushing Export EOs<sup>12</sup> and the UK proposing the AI Growth Lab.<sup>13</sup>

### **The EU AI Act's Critical Implementation Bottleneck**

A major structural vulnerability in the European regulatory framework was highlighted this week. The European Association of Medical devices Notified Bodies (Team-NB) issued a warning to the European Commission, stating that a critical shortage of conformity assessment organizations (Notified Bodies) will "massively hinder" the optimal application and enforcement of the EU AI Act, particularly for high-risk systems.<sup>3</sup> The extended transition period for these high-risk systems runs until August 2027.<sup>6</sup> The capacity crisis within these Notified Bodies transforms regulatory risk into market access risk. Since high-risk AI cannot be deployed in the EU without third-party assessment, this shortage favors large, established incumbents who can secure early slots for review. It disproportionately impacts smaller, agile AI developers, creating a non-tariff barrier that slows innovation within the EU market and risks non-compliance by major companies racing the clock. This human capital shortage is currently the weakest link in the EU's regulatory framework.

### **Ethical Stance as Corporate Strategy: The Simulated Erotica Schism**

A fundamental ethical divergence was formalized by Microsoft AI CEO Mustafa Suleyman, who

publicly opposed the creation of AI services offering "simulated erotica," explicitly differentiating Microsoft from recent moves by competitors like OpenAI (which previewed an adult content policy) <sup>14</sup> and Elon Musk's Grok (which launched companion features for intimate interactions).<sup>2</sup> Suleyman deemed this direction "very dangerous," asserting it risks creating a new "axis of division" between humans and machines.<sup>2</sup> This philosophical schism elevates ethical guardrails into a definitive competitive advantage. By positioning Microsoft as the principled alternative, the company strategically courts major enterprise, government, and healthcare clients—sectors where trust, safety, and reputational risk avoidance are paramount—forcing high-stakes business customers to choose their AI vendor based on ethical tolerance and regulatory alignment.

## Global Coordination vs. National Acceleration

While global bodies achieve necessary consensus in critical verticals, such as health, nation-states are actively pursuing divergent strategies to attract AI economic activity. The Outcome Statement from AIRIS Incheon 2025 (Oct 24), co-hosted by the WHO and South Korea's Ministry of Food and Drug Safety, affirmed the need for lifecycle-based, risk-proportionate, and collaborative global governance for AI in health.<sup>11</sup> In contrast, the UK announced a public call for views on its proposed AI Growth Lab (Oct 21), an initiative intended to pilot responsible AI by relaxing certain regulations in a sandbox environment to accelerate innovation.<sup>13</sup> Similarly, the US continues to focus on Executive Orders (EOs) promoting export and removing barriers to American AI leadership.<sup>12</sup> The UK and US policies, focused on acceleration, minimize regulatory friction and highlight that AI governance is increasingly becoming a competitive instrument where policy flexibility acts as a magnet for R&D capital, allowing companies to engage in regulatory arbitrage by locating R&D activities in fast-moving jurisdictions.

Key Global AI Regulatory Milestones (Q4 2025 Focus)			
Initiative	Jurisdiction	Event (Week of Oct 18-24)	Significance
EU AI Act Capacity Constraint	European Union	Team-NB issues warning regarding Notified Body capacity <sup>3</sup>	Highlights major enforcement bottleneck for high-risk AI systems (Extended transition to Aug 2027) <sup>6</sup>
AI Growth Lab Proposal	United Kingdom	Public call for views announced (Oct 21) <sup>13</sup>	Pilots responsible AI development by

			proposing regulatory sandboxes to accelerate innovation.
AIRIS 2025	Global/WHO/S. Korea	Outcome Statement released (Oct 24) <sup>11</sup>	Establishes a consensus for lifecycle-based, risk-proportionate, and collaborative global governance in health AI.

### Takeaway:

1. The EU AI Act's structural capacity constraints demand immediate, specialized human capital investment to prevent a system-wide regulatory bottleneck.
2. Firms must monitor global policy divergence (EU vs. UK/US) to capitalize on innovation accelerators while ensuring compliance in risk-sensitive markets.
3. The definition of "Responsible AI" is now a core competitive strategy, forcing model providers to explicitly define their ethical boundaries concerning conscious-seeming or exploitative content.<sup>2</sup>

## AI Industry Investment

The investment profile for the week underscored that the 2025 AI funding landscape is defined by concentration and infrastructure prioritization. AI startups claimed a historic 51% of total venture funding year-to-date, despite overall deal volume dropping to its lowest level since 2016.<sup>1</sup> This monumental capital shift is focused on scaling the compute backbone required for mass deployment and facilitating high-stakes strategic convergence among major ecosystem players, driving unprecedented valuations in the data center and application layers.<sup>4</sup>

### Compute and Power Scarcity Drives Megaround Valuations

The largest deal of the week highlighted the market's acute focus on physical infrastructure. Crusoe Energy Systems, a developer of AI data centers and infrastructure, secured a \$1.38 billion financing round, achieving a valuation exceeding \$10 billion.<sup>4</sup> This massive capital injection confirms that the market is treating AI compute capacity as a scarce commodity and a critical utility-like asset. Crusoe's CEO noted publicly that "Power is very scarce right now," validating the market premium placed on firms that can reliably acquire, power, and deploy the physical infrastructure needed for training clusters.<sup>15</sup> This shift in investment focus is a leading indicator that the current bottleneck for AI growth is moving from algorithms to kilowatt-hours

(kWh) and real estate, reinforcing the urgent need for foundational infrastructure investment, paralleling ambitious projects like OpenAI’s 10-GW roadmap.<sup>14</sup>

## The Formation of the Agentic AI Ecosystem Alliance

Another significant deal revealed a coordinated strategic alignment across the core AI technology stack. Uniphore, an enterprise conversational automation platform specializing in agentic AI, closed a \$260 million Series F round at a \$2.5 billion valuation.<sup>16</sup> The investor group was strategically critical, including key players in compute (NVIDIA and AMD), data storage (Snowflake), and data analytics (Databricks).<sup>17</sup> This joint investment is not merely financial; it represents a coordinated move by the technology stack components to secure dominance in the high-growth **Agentic AI** vertical, where applied AI investment grew by 47% year-over-year in Q3 2025.<sup>19</sup> By investing in the application layer (Uniphore), these giants ensure deep, native integration of their hardware and platforms into the operational AI agents used by Fortune 500 companies, thereby creating a powerful, high-friction ecosystem barrier for competitors. Projections suggest that spending on agentic AI could reach \$155 billion by 2030, underscoring the necessity of this strategic lock-in.<sup>19</sup>

## M&A Acceleration for Capability Acquisition

While the United States continues to lead global AI funding, accounting for 85% of all AI funding<sup>1</sup>, the European market demonstrated accelerated consolidation. European AI M&A activity has surged, hitting 100 deals year-to-date, already surpassing the 85 acquisitions recorded in the entirety of 2024.<sup>20</sup> Significant disclosed deals included Workday's \$1.1 billion valuation acquisition of Swedish startup Sana and US customer service giant NiCE’s acquisition of Dusseldorf-based Cognigy for nearly \$1 billion.<sup>20</sup> The focus on consolidation, particularly at the early stage, suggests that M&A is increasingly functioning as a high-speed corporate procurement mechanism for specialized AI talent and intellectual property. This strategy allows large incumbents to bypass the traditional, lengthy internal research and development cycle, rapidly integrating niche, proprietary AI capabilities (such as conversational and agentic AI) needed to maintain competitive product offerings.<sup>20</sup>

Table: 2025 Week of October 18-24 Major Funding Rounds

Company	Sector Focus	Funding Amount	Valuation/Stage	Key Strategic Investors
Crusoe Energy Systems	AI Data Centers/Infrastructure	\$1.38 Billion	\$10B+ Valuation (Megaround)	Valor Equity Partners, Mubadala Capital

Avride	Autonomous Vehicles/Robotics	Up to \$375 Million	N/A	Uber, Nebius Group <sup>4</sup>
Redwood Materials	Battery Recycling (AI Enhanced)	\$350 Million	Series E	Eclipse Ventures, Nvidia's NVentures <sup>4</sup>
Uniphore	Agentic AI/Enterprise Automation	\$260 Million	\$2.5 Billion (Series F)	NVIDIA, AMD, Snowflake, Databricks <sup>4</sup>
General Intuition	Foundational Models/General Agents	\$133.7 Million	N/A	Khosla Ventures, General Catalyst <sup>16</sup>

**Emerging Player Call-out: General Intuition.** Having secured a \$133.7 million funding round from top-tier VCs like Khosla Ventures and General Catalyst, General Intuition is positioned as a significant new entrant focusing on building next-generation foundational models and general agents, signaling investor confidence in long-term, frontier-level AI development beyond the current incumbents.<sup>16</sup>

#### Takeaway:

1. Capital deployment must prioritize vertical integration (compute to application) as the Agentic AI market approaches its projected \$155 billion valuation by 2030.<sup>19</sup>
2. The US retains overwhelming funding dominance (85%), but localized M&A provides critical strategic acquisition opportunities, particularly in Europe.<sup>1</sup>
3. The continued drop in deal volume alongside rising deal size signals that only proven, scalable business models with clear routes to market adoption will secure funding.<sup>1</sup>

## Breakthroughs in AI Technology

This week marked a seminal advancement in DeepTech, with AI moving from advanced pattern recognition to verifiable scientific discovery in a highly impactful domain (oncology). Coupled with advancements in multimodal content generation and the launch of powerful, local compute infrastructure, the focus in R&D is shifting towards highly optimized, cost-efficient model architectures and accessible hardware necessary for rapid prototyping and iterative research.

### AI Transition to Scientific Hypothesis Generator

Google DeepMind, in collaboration with Yale University, announced a major milestone with the release of C2S-Scale 27B, a 27 billion parameter foundation model built on the Gemma open models, specifically designed to understand the "language of individual cells".<sup>5</sup> The model's



breakthrough lies in its success in generating a novel hypothesis about cancer cellular behavior—identifying a new drug combination via a "dual context virtual screen" to enhance antigen presentation (making tumors visible to the immune system)—which scientists then experimentally validated in living cells.<sup>5</sup> This achievement validates the concept of **computational serendipity**: AI can navigate the vast, non-linear space of cellular biology to generate novel causal links that bypass the limitations of traditional, human-led linear research. This dramatically shortens the preclinical discovery cycle and enhances the probability of success in complex areas like cancer immunotherapy.

## Compute Power Decentralization and the Petaflop Desktop

The development of AI compute capacity is pursuing two parallel paths. While OpenAI detailed a roadmap for massive, centralized 10-GW compute infrastructure using custom accelerators developed in partnership with Broadcom<sup>14</sup>, NVIDIA simultaneously launched the DGX Spark, a petaflop desktop system.<sup>14</sup> The DGX Spark's introduction signals the enduring importance of **localized, high-density compute**. The petaflop desktop drastically lowers the barrier for smaller R&D departments or independent research labs to conduct serious, large-scale model prototyping and tuning without incurring massive cloud costs or resource competition. This ensures that innovation speed is not solely dependent on access to the handful of hyper-large, centralized clusters, and it dovetails with the burgeoning Quantum + AI field, which held its Q+AI 2025 event focusing on the integration of these two transformative technologies.<sup>21</sup>

## Optimization and Modularity Dominate Model Architecture Trends

The market focus for deployable models is shifting from simply achieving state-of-the-art (SOTA) raw performance to achieving **SOTA performance-per-dollar** and **architectural flexibility**. Anthropic introduced "Claude Skills," providing modular expertise, alongside the release of Haiku 4.5, a model optimized for fast, cost-efficient coding.<sup>14</sup> This modularity allows enterprises to pay only for the specific domain expertise they require, dramatically cutting inference costs and latency in specialized applications. Further supporting this trend, DeepSeek launched DeepSeek-OCR, known for achieving performance comparable to cutting-edge models like OpenAI's o1 but at a fraction of the cost.<sup>22</sup> Concurrently, the creative tools ecosystem is rapidly maturing, with Runway's Veo 3.1 and Flow models adding native audio control capabilities, and Sora 2 introducing storyboarding tools and extended 25-second cuts, signaling AI's readiness for integrated professional film and marketing production pipelines.<sup>14</sup>

**Emerging Player Call-out: DeepSeek.** DeepSeek's success in creating open-weight models (V3, R1) that rival industry leaders in performance but at significantly reduced operational cost highlights its role as a key driver in the global efficiency and open-source AI race, making sophisticated models accessible to broader developer communities.<sup>22</sup>

**Takeaway:**

1. DeepTech investment should be directed toward specialized foundation models (like C2S-Scale 27B) validated for scientific hypothesis generation in complex domains.
2. The commercial media landscape is accelerating with new tools (Sora 2, Veo 3.1) offering native audio and enhanced storyboarding for professional production pipelines.<sup>14</sup>
3. The next generation of model success will be defined by performance-to-cost ratios and modularity (Claude Skills), not just raw parameter count.<sup>14</sup>

## **Societal and Economic Implications**

The economic impact of AI moved into a period of acute transformation this week, marked by significant, targeted workforce reduction in major IT firms tied explicitly to automation objectives. Concurrently, public behavior is rapidly changing, with generative AI becoming a primary tool for information-seeking, a development that is creating a dangerous feedback loop with the rising, and largely unacknowledged, infusion of AI-generated content into traditional news media.<sup>10</sup> The central societal challenge revolves around rapidly reskilling the exposed labor force and maintaining trust in an increasingly automated information environment.

### **The Accelerated Timeline of the AI Reskilling Mandate**

The workforce transformation predicted for the coming decade is already manifesting as mandated, large-scale adjustments. Indian IT giants are aggressively restructuring: TCS plans to cut around 20,000 positions to integrate AI and automation, marking one of the largest recent workforce adjustments.<sup>24</sup> Similarly, Accenture laid off thousands globally, citing employees' inability to reskill in AI as a key factor.<sup>24</sup> This trend indicates that major service providers are no longer waiting for natural attrition to handle AI integration; they are actively driving large, mandatory workforce adjustments. US-specific data confirms this threat is immediate, showing that 15.1% of employment—roughly 23.2 million jobs—is already at least 50% automated.<sup>25</sup> Most affected occupations are computer and mathematical roles (32%), production (22.8%), and architecture/engineering (21.7%).<sup>25</sup> For the professional class, AI proficiency—including full-stack engineering, data fluency, and AI integration skills—is transitioning from a bonus to the prerequisite for continued employment.<sup>24</sup>

### **The Critical Feedback Loop in the Information Ecosystem**

Public use of generative AI has surged, with weekly usage jumping from 18% to 34% globally in one year.<sup>10</sup> Crucially, information-seeking has more than doubled, replacing content creation as

the leading weekly use case (24%).<sup>10</sup> A parallel study examining US newspapers found that over 9% of all news articles contain at least some AI-created text.<sup>23</sup> This convergence creates a critical, self-referential feedback loop: consumers are increasingly reliant on AI models to synthesize information (demand), but those models are being trained on, and summarizing, source material (news) that is itself increasingly authored or assisted by AI (supply).<sup>23</sup> This dangerous feedback loop risks amplifying subtle biases, reducing the overall diversity of content, and further exacerbating the public’s deep skepticism toward news organizations, a trend already noted in global surveys.<sup>10</sup>

## Generative AI as a General-Purpose Utility

The fundamental shift of the leading weekly use case from content creation to information-seeking confirms that generative models are functionally substituting traditional search engines for many users.<sup>10</sup> Embedded AI, specifically systems integrated into existing services like Google’s Gemini and Microsoft’s Copilot, is driving broader exposure and usage.<sup>10</sup> This normalization is particularly pronounced among younger demographics, with 59% of the 18–24 category reporting weekly use of generative AI.<sup>26</sup> The high frequency and authoritative use of these tools for "information-seeking" indicate that AI has achieved utility status, establishing itself as a core infrastructure component for daily life and competing directly with traditional, deterministic methods for sourcing knowledge.

Table: AI-Driven Workforce Automation and Public Information Consumption

Metric/Insight	Data Point (2025)	Source Snippet
US Employment 50%+ Automated	15.1% (23.2 million jobs)	25
Major IT Layoff Target (TCS)	~20,000 positions cut for automation integration	24
Weekly Gen AI Use (Global Surge)	Jumped from 18% (2024) to 34% (2025)	10
News Content with AI Text (US)	Over 9% of all articles	23
Most Automated US Occupation	Computer and mathematical roles (32%)	25

**Emerging Player Call-out: Sumble.** Sumble’s emergence from stealth with \$38.5 million in funding, specifically focused on AI-powered context for sales intelligence, highlights the increasing investment in vertical solutions designed to automate and augment highly compensated, data-rich professional roles.<sup>27</sup>

**Takeaway:**

1. Corporate executives must execute mandated, large-scale reskilling programs focused on data fluency and AI integration skills to mitigate automation risk and remain

competitive.<sup>24</sup>

2. The confluence of AI-authored news and AI-driven search demands immediate media literacy campaigns to counter declining public trust and systemic bias amplification.<sup>10</sup>
3. Policy makers must urgently address the fate of the 15.1% of US jobs already highly automated, particularly in technical and production sectors.<sup>25</sup>

## Conclusions

The week of October 18-24, 2025, revealed a complex maturity curve for the AI industry, characterized by both explosive acceleration and critical friction points. Capital markets are prioritizing the physical scale of compute capacity, treating power and data centers as the essential, scarce commodities required for the next stage of foundational model development. This is evident in the historic VC funding capture by AI and the massive mega-rounds secured by infrastructure providers.

Technologically, the industry crossed a significant threshold: AI can now generate novel, scientifically validated hypotheses, moving beyond correlation and prediction into true discovery. However, the successful deployment of these sophisticated systems into enterprise and regulated environments faces severe geopolitical and systemic constraints. The ethical divide concerning the creation of conscious-seeming or exploitative AI models is now a defining factor in enterprise vendor selection, while regulatory efforts, particularly in the EU, are hitting critical human capital bottlenecks that threaten to derail scheduled compliance timelines.

Economically, the impact of AI is no longer theoretical. The labor market is undergoing targeted, mandatory restructuring driven by automation, confirming that AI proficiency is an immediate necessity for career stability, particularly in legacy IT and technical roles. Simultaneously, the accelerating reliance on AI for information-seeking creates an unstable information ecosystem, demanding urgent action to establish provenance and maintain public trust in media.

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