AI Is Redrawing the Industry Landscape

How artificial intelligence is changing industry economics, competitive advantage, and the future of business

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Executive overview

AI changes an industry when it changes the economics of value creation, the balance of competition or who captures the profit.

AI changes an industry when it changes who can produce value, what customers will pay for it, or who captures the resulting profit. Faster work matters, but the strategic question is whether those gains strengthen incumbents, enable competitors, expand demand or transfer bargaining power to another part of the value chain.

Following Issue 04's focus on business models, this briefing moves outward to industry structure. Across fifteen industry groups, a common tension emerges: AI can make expertise and production more accessible while increasing dependence on scarce assets such as trusted distribution, proprietary data, computing infrastructure, physical networks and regulatory permission. Entry may become easier at one layer and harder at another.

Through 2030, the central challenge is converting increasingly capable tools into reliable operating economics. During 2030-2035, deeper restructuring becomes plausible where autonomous workflows, robotics or scientific applications clear their implementation barriers. These are conditional strategic outlooks, not forecasts of market size, employment losses or inevitable winners.

The leadership question

Where does AI change the constraint that determines our industry's cost, customer relationship or bargaining power?

Three implications recur across the fifteen industries. Lower production costs can invite new entrants and price pressure. Scarce complements - trusted distribution, proprietary information, physical networks and permission - can retain or gain value. And implementation costs determine whether technically possible change becomes economically worthwhile.

This issue uses two horizons. Through 2030, the emphasis is deployment, workflow redesign and retained value. For 2030-2035, the analysis considers conditional changes in industry structure. Longer-horizon possibilities are neither deadlines nor employment forecasts.

The charts distinguish reported adoption from modelled occupational transitions. The industry map explains strategic conditions without assigning unsupported numerical scores. Each industry assessment connects evidence to economic mechanisms and measurable decisions.

THIS ISSUE AT A GLANCE

01 THREE MEASURES
Adoption, task exposure and economic disruption.

02 FIFTEEN INDUSTRIES
Equal coverage of costs, competition and structural change.

03 TWO HORIZONS
Operating choices through 2030; conditional change in 2030-2035.

04 90-DAY AGENDA
Diagnose, decide, execute and adapt using measured outcomes.

Three measures, three different questions

Adoption measures whether organisations use AI. It says little by itself about deployment depth, decision authority or financial returns. OECD data published in January 2026 reported AI use by 20.2% of firms in available country data for 2025, compared with 57.3% in ICT and 36.8% in professional and scientific services. These are survey-defined populations, not a census of the global economy. [1]

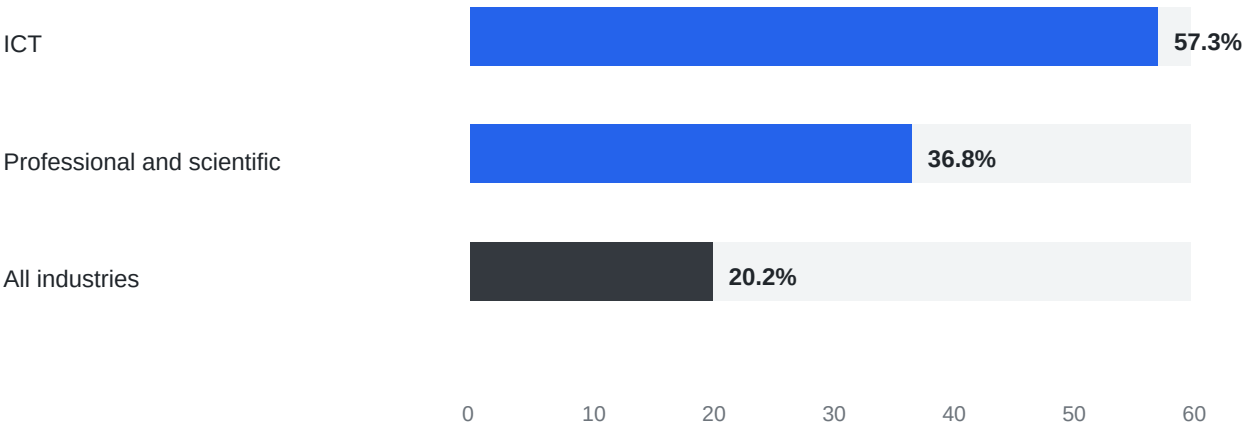
Task exposure measures which activities AI might assist or automate. Anthropic's March 2026 research combines technical capability with observed Claude usage; its occupational categories are not industries. The study found no systematic increase in unemployment among highly exposed workers, alongside suggestive evidence of slower hiring of younger workers. Neither finding establishes the eventual employment outcome. [2]

Economic disruption means changes in costs, prices, demand, entry barriers, market power or value capture. It requires additional evidence. OpenAI's transition framework explicitly incorporates human accountability and demand expansion, illustrating why technical exposure alone cannot predict job elimination. Its classifications are modelled possibilities, not realised outcomes. [3]

The analysis below therefore follows a chain: affected activity, deployable workflow, unit economics, customer response and competitive consequence. Evidence establishes the starting point; the horizon statements are this briefing's interpretation. Comparable worldwide adoption or disruption statistics do not exist for all fifteen groups, so no numerical league table is presented.

EXHIBIT 1 | AI adoption across selected OECD industries, 2025

Share of firms using AI (%)

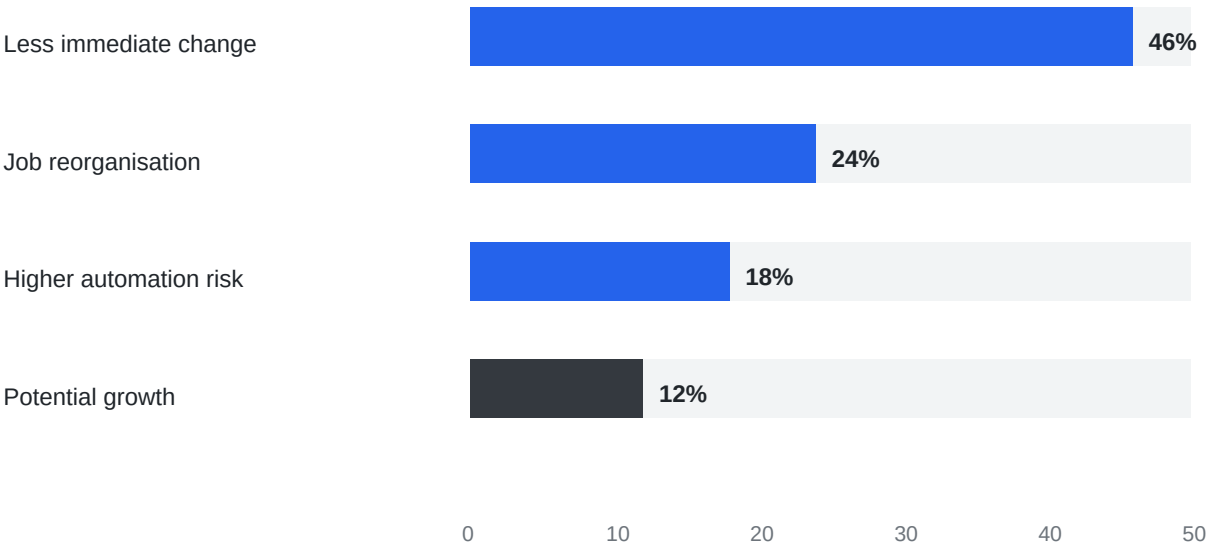


Source: OECD, 28 January 2026 [1]. Available-country enterprise data; firms with at least 10 employees. Sector aggregates are not identical to this briefing's editorial groups. All industries is an aggregate benchmark. Adoption is not disruption.

Task exposure is not an employment forecast

EXHIBIT 2 | Four possible labour-market transitions

Share of US jobs in OpenAI's model classifications (%)



Source: OpenAI, 25 April 2026 [3]. Approximately 148 million jobs across 921 occupations. Rounded categories are modelled classifications, not observed transitions or predicted job losses.

What this means for industry strategy

An occupation can be technically exposed while remaining human-led because of accountability, physical presence, trust or demand. If productivity lowers prices enough to attract new customers, employment can expand even as labour per unit falls. If demand is limited and buyers can easily switch, pressure on price and staffing may be stronger.

Anthropic's March 2026 evidence found no systematic rise in unemployment among highly exposed workers, with suggestive evidence of slower hiring among younger workers. Its observed exposure measure combines technical capability with Claude usage. It is neither an enterprise-adoption census nor a classification of industries. [2]

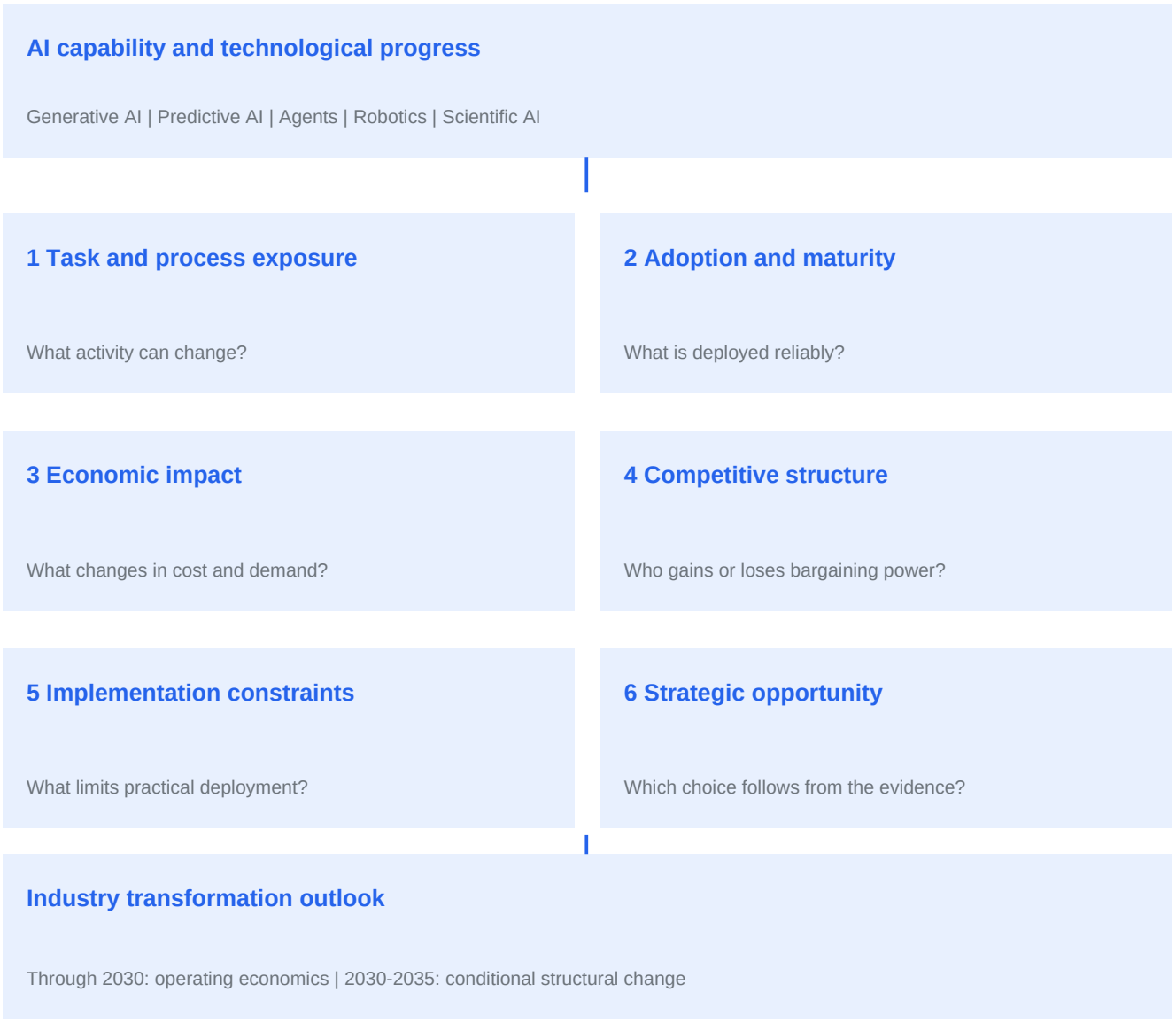
These sources address different populations and methods. Their percentages should not be averaged, placed on one common scale or used to calculate an industry disruption score.

The economic test

Follow the chain from affected activity to reliable workflow, unit cost, customer response and retained value. A useful deployment can improve quality without cutting expenditure. A cost saving can reach customers through lower prices. A company can become more productive while losing bargaining power.

How this briefing assesses transformation

EXHIBIT 3 | Industry AI Transformation Framework

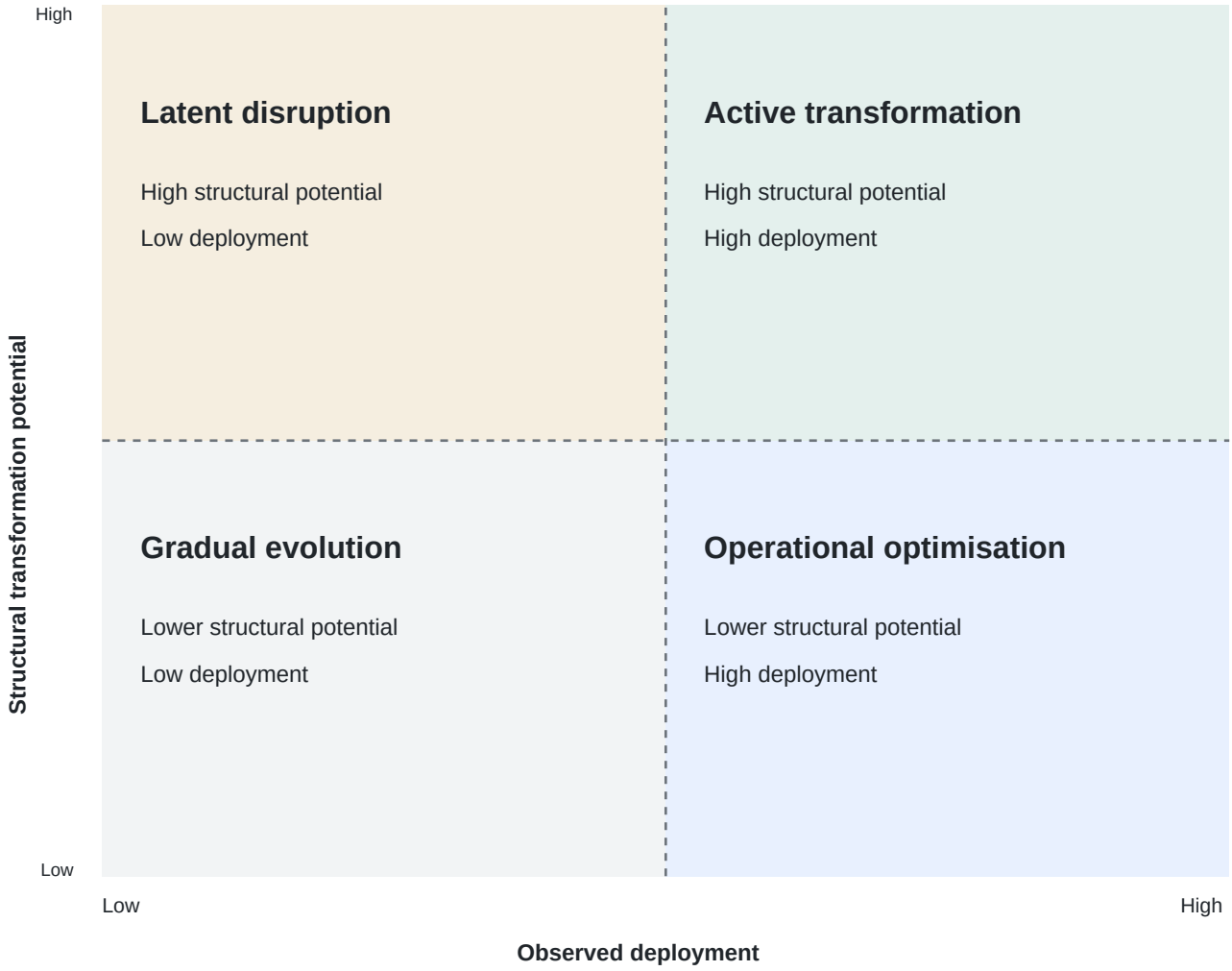


Author's analytical synthesis. Six dimensions are examined separately; strategic opportunity synthesises the preceding five. This is not a published or empirically validated risk index.

The same questions are applied to all fifteen industry groups. Evidence defines the starting point; horizon statements identify plausible mechanisms and conditions. The research foundation records boundaries, confidence, counterarguments and source limitations.

Deployment and structural change are separate

EXHIBIT 4 | Conceptual industry landscape map



Author's conceptual synthesis. No numerical scale, measured industry ranking or forecast probability is implied. Industry positions are deliberately not plotted: comparable deployment and structural-impact measures do not exist across all fifteen groups.

An industry may move towards active transformation when integration costs fall, permission changes or customers accept a new way of buying. High deployment can also remain operational: many firms may use AI without changing who controls demand or captures profit.

Use the quadrants to discuss a defined business segment, geography and workflow. Validate a proposed placement with separate evidence for deployment and structural change. The comparison on the following page identifies the economic mechanism in each industry without manufacturing a common score.

Fifteen industries: where the economics change

EXHIBIT 5 | Comparative economic assessment

Author's synthesis of the industry assessments and sources [4-20]. Equal coverage does not imply equal evidence strength or transformation speed.

Industry	Economic pressure	Constraint / source of advantage
Software and IT services	Cheaper creation; changing sale unit	Reliable integration and distribution
Professional services	Repricing repeatable expert work	Accountability and client outcomes
Media and advertising	Abundant content; contested discovery	Rights, trust and direct audiences
Finance and insurance	Lower servicing and analytical cost	Risk control, capital and relationships
Education and training	Cheaper feedback and instruction	Verified learning and credentials
Healthcare and life sciences	Capacity and research productivity	Clinical evidence and payment incentives
Retail and e-commerce	Delegated discovery and purchasing	Product data, fulfilment, customer access
Telecommunications	Network cost and service change	Utilisation and capital discipline
Manufacturing and industrials	Yield, throughput and flexibility	Process knowledge and installed assets
Automotive and mobility	Engineering and fleet economics	Safe operating domains and utilisation
Energy and utilities	Indirect demand plus grid operations	Connections, commitments and reliability
Logistics and transportation	Coordination and capacity use	Interoperability and physical execution
Construction and real estate	Design coordination and reduced rework	Contracts and repeatable delivery
Agriculture and food	Input efficiency and selective automation	Seasonal economics, finance and access
Public services and government	Capacity and service redesign	Accountability and institutional capability

Industry assessments | 01-03

Evidence establishes the starting point. Through-2030 and 2030-2035 statements are conditional strategic interpretations.

01 Software and IT services

Software faces pressure on both production costs and the unit of sale. Cheaper development can expand the market for customised applications while making routine implementation harder to price at a premium. Yet coding assistance is not automatically faster delivery: METR's early-2025 experiment found slower completion among experienced developers in familiar repositories; its 2026 update warned that newer estimates suffered selection problems. [4]

Through 2030, competition is likely to centre on dependable workflow completion, integration and maintenance rather than code volume. Buyers may substitute internal development for some purchased software; suppliers may test usage or outcome pricing as automation changes seat requirements.

During 2030-2035, reliable agents could redistribute value from individual applications towards systems that coordinate work across them. This depends on security, interoperability and affordable verification. Leaders should measure the cost of accepted, maintained functionality, including review and rework. Distribution, customer context and switching costs may remain more defensible than the ability to generate software itself.

02 Professional services and consulting

The economics of selling expert time face a challenge when research, analysis and drafting become cheaper. A field experiment involving 758 consultants found gains on tasks within the tested model's capability frontier, demonstrating task-specific potential rather than firmwide profitability. [5] Clients can reasonably ask why an accelerated assignment should retain its previous price.

Through 2030, repeatable deliverables are likely to face price pressure while judgement, implementation and accountable advice retain value. Smaller teams could serve clients previously priced out of specialist support, expanding demand even as labour per engagement falls. Review costs and professional responsibility limit how much work can be delegated.

During 2030-2035, managed services and continuously updated advice could take business from episodic projects if outcomes can be verified. Firms should redesign their staffing and learning models together: removing junior production without replacing apprenticeship risks weakening future expertise. The useful indicator is contribution per validated client outcome, alongside renewals and professional-error rates.

03 Media publishing and advertising

AI increases the potential supply of text, images and advertising variants. The economic consequence depends on whether attention, trust and distribution become more scarce as production expands. Copyright remains a material commercial variable: the US Copyright Office's reports separately address digital replicas, output copyrightability and model training. [6]

Through 2030, routine production is likely to become more competitive, while publishers and agencies seek differentiation through original reporting, distinctive intellectual property, audience relationships and measurable campaign performance. An intermediary that answers a question directly may change the value of a referral, even when demand for information remains strong.

During 2030-2035, licensing and direct audience businesses could become more important if AI interfaces capture more discovery. That is a scenario, not an established industrywide revenue outcome. Leaders should track net revenue per audience relationship, referral dependence and rights costs. Producing more content is commercially useful only when it improves reach, conversion or willingness to pay after verification and distribution expenses.

Industry assessments | 04-06

Evidence establishes the starting point. Through-2030 and 2030-2035 statements are conditional strategic interpretations.

04 Financial services and insurance

Finance combines information-intensive work with capital, trust and accountability. The Bank of England and FCA's October 2026 survey found AI use among 86% of respondents; broad agent autonomy remained rare. The changing respondent population means the adoption figure should not be treated as a clean longitudinal growth rate. [7]

Through 2030, fraud detection, service operations, claims handling and analytical support offer routes to lower costs and faster response. Whether customers receive lower prices depends on competition, risk selection and switching behaviour. Banks and insurers retain advantages from regulated capabilities and established relationships, while dependence on shared technology providers can create another concentration point.

During 2030-2035, consumer agents could alter product discovery and switching, transferring influence towards the customer interface. Reliability, consent and responsibility for adverse outcomes constrain that path. Leaders should monitor risk-adjusted servicing costs, claims leakage, customer retention and provider dependence. Operational savings should never be assessed separately from losses, complaints or control failures.

05 Education and training

AI can reduce the cost of preparing materials, providing practice and delivering feedback. Education's economic value, however, also includes motivation, social learning, assessment and trusted credentials. UNESCO's guidance emphasises human agency, privacy and institutional validation rather than treating tool availability as proof of educational effectiveness. [8]

Through 2030, tutoring and workforce training could become more personalised and accessible. Institutions may spend less on producing standard content while investing more in assessment integrity, instructional design and learner support. Low-cost provision can expand demand, but cheap explanations alone do not establish improved learning or sustainable revenue.

During 2030-2035, separation between content provision, instruction and credentialling could deepen if employers and learners accept new forms of verified attainment. Schools and universities retain powerful institutional and social roles. Leaders should compare cost per demonstrated learning gain, completion and longer-term retention, not chatbot engagement. Procurement should preserve access to learning records and permit providers to be changed without disrupting learners' progress.

06 Healthcare and life sciences

Healthcare's opportunity spans administration, clinical support and research, but these have different economics. The FDA's AI-enabled device list establishes specific marketing authorisations, not universal clinical adoption. Its 2025 drug-development draft guidance focuses on model credibility for a defined use. Neither establishes a general reduction in treatment costs or development failure. [9,10]

Through 2030, documentation and workflow support may release capacity, while validated diagnostic tools can change particular service lines. Savings depend on integration, payment incentives and whether freed time treats more patients. Research productivity creates value only when promising findings survive laboratory and clinical testing.

During 2030-2035, more integrated care pathways and AI-assisted discovery could shift advantage towards organisations combining high-quality data, clinical evidence and delivery capability. Liability, access and reimbursement will shape the pace. Leaders should track cost per completed care episode, patient outcomes and staff workload; research organisations should track validated progression, not generated candidates. The value of prediction depends on the action it enables.

Industry assessments | 07-09

Evidence establishes the starting point. Through-2030 and 2030-2035 statements are conditional strategic interpretations.

07 Retail and e-commerce

Retail's strategic exposure lies partly in who guides the purchase. Amazon's published shopping-assistant features demonstrate comparison, discovery and delegated purchasing capabilities within a commercial platform. They establish product functionality, not an independently measured industrywide shift in consumer behaviour. [11]

Through 2030, AI can support merchandising and service while making product information easier to compare. If customers increasingly delegate discovery, retailers and brands may compete for inclusion in recommendations as well as shelf space and search visibility. Lower acquisition friction may expand sales, but price transparency and intermediary fees can absorb the benefit.

During 2030-2035, purchasing agents could reorganise loyalty around trusted delegation rather than repeated visits to individual stores. Adoption will depend on reliability, permissions, returns and consumers' willingness to surrender choices. Leaders should strengthen product data, availability and fulfilment, then measure contribution after returns and acquisition costs. Owning inventory or an attractive storefront will not necessarily mean owning the customer relationship in that scenario.

08 Telecommunications

Telecommunications combines opportunities to optimise networks with the cost of supporting more digital activity. GSMA's 2026 energy analysis considers both AI-related demand and network-efficiency opportunities. It does not establish that higher traffic automatically produces higher operator margins. [12]

Through 2030, the most tangible opportunities include service automation, network planning, fault response and energy management. Savings must be assessed against computing expenditure, integration and reliability obligations. Operators may offer enterprise AI infrastructure or managed services, but these markets also bring competition from cloud and equipment providers.

During 2030-2035, more autonomous network operations and edge-based services could change the division of value between operators and technology suppliers. The commercial case depends on customer willingness to pay for latency, resilience or local control. Spectrum, sites and networks remain substantial entry barriers. Leaders should track service-quality-adjusted operating costs and incremental returns on AI-related investment, ensuring that new capacity earns revenue rather than simply accommodating more traffic at unchanged prices.

09 Manufacturing and industrials

Manufacturing's opportunity is embedded in engineering, yield, maintenance and production flexibility. NIST's 2026 digital-twin workshop report identifies interoperability, validation, cybersecurity and workforce readiness as persistent challenges. Digital twins and automation are broader than AI; their benefits should not all be credited to models. [13]

Through 2030, focused deployments can improve inspection, scheduling and asset utilisation where equipment and data permit reliable feedback. Incumbents with process knowledge and installed systems may benefit, but transferring a successful pilot between factories can require expensive adaptation. Savings in one activity matter only if they improve overall throughput or release usable capacity.

During 2030-2035, more adaptable robotics and engineering systems could support economical smaller production runs and change location decisions. Capital replacement cycles and safety remain constraints. Leaders should evaluate total conversion cost, first-pass yield, downtime and returns on deployed capital. Machine capability is strategically valuable when it improves the economics of the whole production system, not merely a demonstration cell.

Industry assessments | 10-12

Evidence establishes the starting point. Through-2030 and 2030-2035 statements are conditional strategic interpretations.

10 Automotive and mobility

AI affects vehicle engineering, assisted driving and mobility operations, but these should not be conflated. NHTSA distinguishes driver-assistance technologies from automated driving systems; assistance features are not evidence that a vehicle can operate without supervision. [14] Different operating environments imply different costs and responsibilities.

Through 2030, bounded deployments and engineering improvements are more defensible planning assumptions than universal autonomy. Fleet economics depend on utilisation, maintenance, insurance, remote support and service geography as well as driving capability. Vehicle manufacturers, software developers and fleet operators may capture different portions of the value.

During 2030-2035, wider automated services could shift selected markets from vehicle ownership towards purchased mobility, if safety, permissions and unit costs support expansion. This will be uneven across places and use cases. Leaders should assess cost per revenue-generating mile, intervention rates and capital recovery within each operating domain. A technically successful trip establishes less than a profitable, scalable transport service with dependable demand.

11 Energy and utilities

Energy illustrates how AI can transform an industry without extensive automation of its own workforce. The IEA's 2026 central projection puts global data-centre electricity use at about 950 TWh in 2030, up from 485 TWh in 2025. This covers all data centres, not AI alone, and remains a projection. [15]

Through 2030, connection capacity, equipment availability and dependable supply can influence where computing infrastructure is built. AI can also improve grid operations; the IEA's September 2026 grid report places it within a wider portfolio of digital tools. [16] Higher demand creates investment opportunities but also financing and cost-allocation questions.

During 2030-2035, demand could diverge substantially depending on computing efficiency, usage and infrastructure delivery. Utilities should test multiple load scenarios and require credible commercial commitments before expanding capacity. Leaders should monitor contracted versus requested connections, utilisation, reliability and returns. Demand growth does not guarantee attractive earnings if costs, delays or stranded assets fall on the wrong parties.

12 Logistics and transportation

Logistics earns value by coordinating movement under uncertainty. DHL's 2026 Trend Radar highlights agentic AI, analytics and AI commerce; it is an operator's assessment of emerging trends, not proof of industrywide financial returns. [17] Physical networks and execution remain essential even when planning becomes cheaper.

Through 2030, forecasting, routing, documentation and warehouse coordination can improve utilisation and reduce avoidable exceptions. Savings are sensitive to data quality and interoperability across shippers, carriers and borders. In competitive lanes, lower costs may be passed through to customers rather than retained as higher margins.

During 2030-2035, systems that coordinate capacity across organisations could increase the power of intermediaries controlling demand and operational data. More automation in facilities or transport may reinforce scale advantages where utilisation justifies capital. Leaders should track contribution per shipment, empty miles, delivery reliability and exception-handling cost. The strategic asset is dependable coordination across the full journey, including disruption, not an optimised route that fails at the next handover.

Industry assessments | 13-15

Evidence establishes the starting point. Through-2030 and 2030-2035 statements are conditional strategic interpretations.

13 Construction and real estate

Construction's fragmented delivery model separates design productivity from site productivity. RICS's 2025 global professional survey found 45% reporting no organisational AI implementation and 34% early pilots. These are respondents' reports, not a representative worldwide enterprise-adoption estimate. [18]

Through 2030, estimating, document review, design coordination and property administration offer more immediate opportunities than wholesale automation of building sites. Better information can reduce rework, but contracts, permitting, financing and subcontractor coordination determine whether savings are captured. In real estate, analytical improvements do not eliminate location scarcity or cyclical demand.

During 2030-2035, integrated design-to-production systems and selective robotics could favour more repeatable building methods. Progress depends on standardisation, liability allocation and a sufficient pipeline of projects. Owners should connect project information to lifetime asset operation rather than lose it at handover. Track forecast accuracy, change orders, delivery time and operating costs; keep property-market returns separate from the measured contribution of AI to asset performance.

14 Agriculture and food

Agriculture combines biological uncertainty, seasonal work and highly varied farm economics. FAO's research on automation identifies infrastructure, skills, financing and suitability for smaller producers as adoption conditions. It addresses agricultural automation broadly and should not be read as a current generative-AI adoption survey. [19]

Through 2030, precision decisions, targeted interventions and selective automation can create value where input savings and labour availability justify investment. Food processors can apply better inspection and planning, but gains depend on reliable operations and demand. The economics of a large, connected farm do not transfer automatically to smaller producers or different climates.

During 2030-2035, robotics and integrated advisory services could change relationships among growers, equipment suppliers and agricultural platforms. Access through shared services may widen participation; expensive proprietary systems may increase dependence. Leaders should evaluate margin per hectare or processed unit, resource use and resilience across seasons. Data portability and equipment compatibility affect bargaining power as much as the quality of a prediction.

15 Public services and government

Government's economic objective is public value: effective service, equitable access and accountable decisions within available resources. OECD's 2025 review examined 200 AI use cases across eleven government functions. The cases demonstrate varied applications but are not a representative adoption survey or a causal estimate of savings. [20]

Through 2030, administrative support, case triage and knowledge retrieval can reduce delays if processes and data improve alongside tools. Procurement determines whether capacity grows internally or dependence on vendors deepens. Productivity gains should be measured against service quality, accessibility and the ability to challenge consequential decisions.

During 2030-2035, integrated services could reduce repeated information requests and coordinate support around citizens' needs. This depends on lawful data sharing, institutional cooperation and public trust. Agencies should measure cost per correctly resolved case, waiting time, error and appeal rates. Institutional transformation is substantial even without commercial disruption: the allocation of authority, accountability and access may change as much as the administrative cost base.

What leaders should do now

The industry comparison points to three strategic tests. First, identify whether AI changes a peripheral activity or the bottleneck that determines cost and capacity. Second, determine who captures the benefit: the producer, customer, distributor or technology supplier. Third, distinguish a capability improvement from a change in competitive position. A company can become more productive while losing pricing power.

Over the next 90 days, leadership teams should select two consequential workflows and establish a baseline for cost, quality, time and customer outcomes. Include integration, inference, supervision, rework and transition costs. Decide in advance what would justify expansion or termination. Track actual redeployment of released capacity; hours saved have limited economic value when nothing useful changes downstream.

In parallel, examine one strategic dependency: customer access, proprietary information, infrastructure or a critical supplier. Test how an AI-enabled entrant or intermediary could change its value. Preserve the ability to change providers, retain essential knowledge and negotiate access to data. These choices can matter more than selecting the highest-performing model this quarter.

For 2030-2035, maintain options rather than a single technology forecast. Define observable triggers: reliable autonomous completion, permission to deploy, repeatable customer demand or falling physical implementation costs. Review them quarterly with a named decision owner. AI will redraw the landscape unevenly; advantage will depend on recognising when better tools have become a different economic system, and acting while meaningful choices remain.

EXHIBIT 6 | Two horizons, different commitments

Through 2030	2030-2035	Decision trigger
Deploy bounded, reliable workflows	Consider wider autonomous coordination	Repeatable completion with affordable verification
Test full operating economics	Preserve options for structural change	Customer demand and retained contribution
Strengthen data and switching rights	Reassess customer and supplier power	Interface control and dependency change
Work within physical and institutional limits	Expand only when barriers are cleared	Safety, permission and viable utilisation

Author's conditional decision guide. The horizons are planning windows, not capability forecasts.

A 90-day leadership agenda

DIAGNOSE | days 1-20

Map two workflows. Record cost, quality, time and dependencies.

DECIDE | days 21-30

Choose a test. Set the owner, baseline and stop-or-expand rule.

EXECUTE | days 31-70

Run a bounded rollout. Count integration, review and rework.

ADAPT | days 71-90

Measure retained value. Expand, change or stop; review quarterly.

Questions for the next executive meeting

- Which activity constrains customer value or usable capacity today?
- Who would capture the benefit if that activity became much cheaper?
- What do our full costs include beyond the model or software licence?
- Which customer relationship, data asset or supplier dependency could change?
- What observable result would make us expand, redesign or stop?

Review the assumptions quarterly

Assign an owner to each important assumption. Track customer response, total delivery cost, quality and supplier dependence together. For physical activities, use a full operating cycle; for seasonal businesses, test across seasons. For consequential services, include outcomes and review rights. Record failed deployments alongside successes so the next investment decision reflects the whole evidence base.

About the author



Dr. Maralani is a senior executive and an advisor on business strategy, transformation and applied AI, with three decades of international management experience across strategy, business operations, technology, processes, quality, compliance, licensing strategies, sales and engineering. His work focuses on translating external change and complex business challenges into clear strategic choices, practical plans and measurable management results.

Research note

This briefing is a structured synthesis of official statistics, original research, regulatory publications and clearly identified first-party material. Adoption, task exposure and economic disruption are kept separate. Country-specific samples are not treated as global industry estimates; company examples establish reported capabilities, not marketwide results. Horizon statements are analytical scenarios. Research cut-off: 9 November 2026. The separate research foundation contains the method, industry crosswalk, confidence assessments and annotated sources.

About Cogliva

Cogliva is an AI-enabled business strategy workspace for consultants, founders, executives and leadership teams, designed to connect diagnosis, strategy design, tactical planning, source-grounded strategic signals and continuous strategy management in one working environment. Its monthly briefing follows the same management logic: interpret external developments through the decisions, operating assumptions and execution choices that may affect the organisation. Learn more at cogliva.com.

Sources

Numbered notes correspond to the publication text and exhibits. All links point to original or official sources. The companion foundation documents access limitations and supporting methodological references.

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THE MONTHLY STRATEGIC BRIEFING

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