



Beyond the hype: AI's real impact on learning



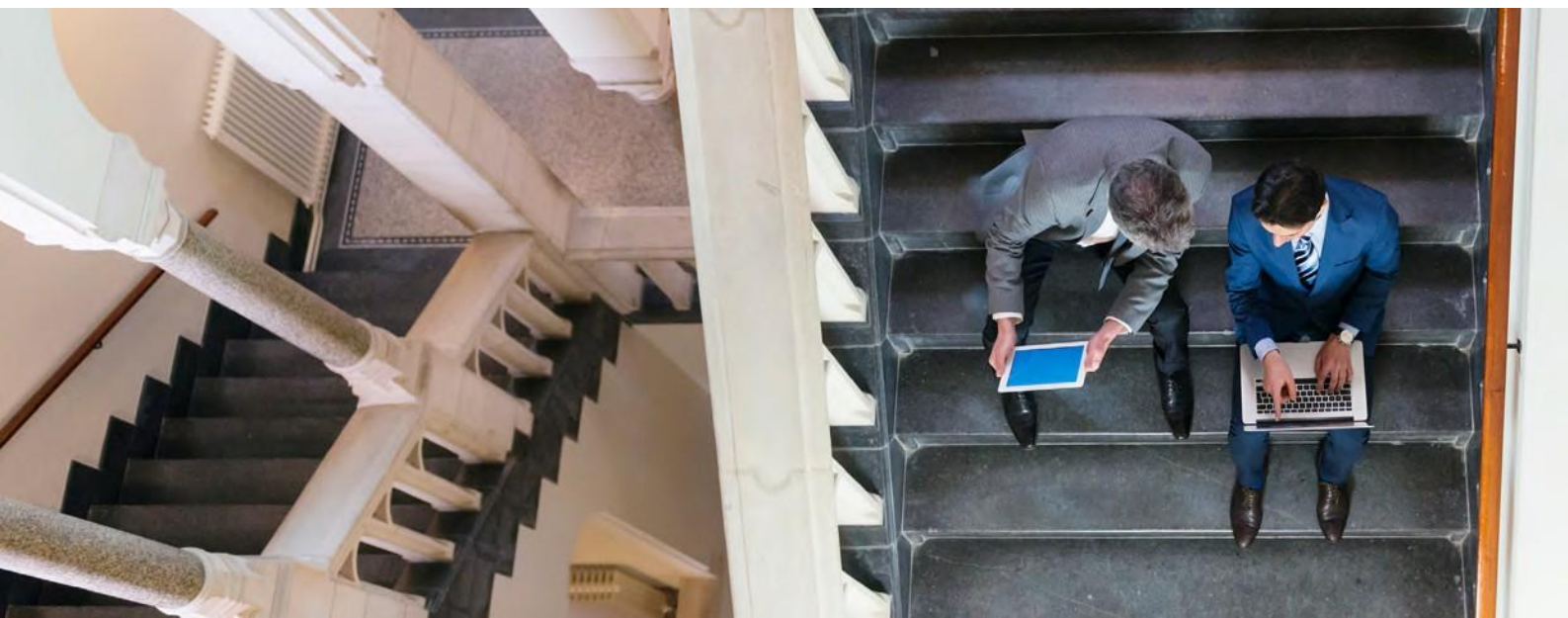
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Executive summary

Artificial intelligence (AI) is no longer a distant promise—it is actively reshaping how organisations design, deliver, and scale learning. As businesses face mounting pressure to upskill and reskill, AI offers a clear path to personalised, efficient, and strategically aligned workforce development.

This study captures the voices of senior HR and L&D leaders across industries, revealing what companies are already doing today and the lessons they've learned. These real-world insights provide practical guidance for moving from experimentation to impact.

Our findings clearly show that technology is only part of the equation. Success lies in achieving the right balance between human insight and technological capability. AI can automate and personalise learning, but human judgement, empathy, and storytelling remain irreplaceable. Organisations that combine strong governance, high-quality data, and cultural readiness with leadership advocacy move fastest from pilots to measurable results.



02

Navigating the hype and reality of AI in learning

AI is rapidly becoming a cornerstone of business transformation. Across industries, organisations are experimenting with it in how they develop their people. From generative tools to intelligent learning platforms, AI is reshaping the learning landscape swiftly.

This shift arrives at a critical moment. As companies face the need to upskill and reskill large segments of their workforce, traditional learning models are struggling to deliver at scale. Within this context, AI isn't just a learning enabler but a business imperative. The promise of significant cost savings, faster time-to-skill, and improved workforce productivity makes its adoption a strategic no-brainer.

As organisations navigate the dual pressures of rapid technological change and workforce transformation, a new model of learning is emerging—one that is individualised, network-based, and AI-enabled. This model reimagines learning as a dynamic, embedded experience—one that adapts to the learner's context, connects across organisational boundaries, and is powered by intelligent systems that guide development in real time. While this model reflects the aspirations of many L&D leaders, it also raises critical questions about the evolving role of humans in learning.

This article explores how leading organisations are navigating this shift. Drawing on in-depth interviews with senior HR and L&D leaders from various industries, we explore how those organisations view the future of learning, integrate AI into their learning ecosystems, and reflect on important lessons learnt along the way.

It is designed for business leaders who want to understand how AI can unlock new value in workforce development—and how to move from experimentation to impact.



03

The future of learning: introducing the immersive learning function

At PwC, we see the future of learning as immersive, intelligent, and deeply learner-centric—and it's already taking shape. Learning is moving from static courses to dynamic experiences embedded in the flow of work, powered by AI and designed to be adaptive and emotionally engaging. This shift blends human insight with machine intelligence to deliver relevance at scale.

Some components—such as real-time personalisation, intelligent agents, and modular service architecture—are still emerging and can be challenging to operationalise. Success will require more than technology. It demands new governance models, AI literacy, and cultural readiness to ensure adoption and impact.



Personalisation



Intelligent agents



Modular service
architecture



An immersive learning function facilitates individualised and network-based learning, enabled by AI

PwC's view on the operating model of an immersive learning function



Graph 1

The organisations we spoke to share this vision. They're not just imagining the future—they're actively building it. Their efforts reflect a learning model that is:



Hyper-personalised, powered by robust data

Tailored to individual roles, aspirations, and skill gaps—enabled by accurate, integrated data as the foundation for AI-driven recommendations.



Context-aware, embedded in the flow of work

Delivered at the moment of need, seamlessly integrated into daily tasks to make development natural rather than disruptive.



Emotionally engaging and experiential

Designed to inspire and connect through storytelling, coaching, and interactive formats such as simulations and VR—bringing a human dimension to digital learning.



Efficient and scalable, with balanced automation

Structured for AI to automate routine tasks and curate content while allowing human interaction to post feedback, reflect, and build trust.



Strategically aligned and culturally accepted

Anchored in business priorities and supported by a culture of openness and experimentation—ensuring adoption and impact across the organisation.

The path forward is not uniform. While some organisations are still defining their strategy, others are experimenting with immersive models, and leaders are already embedding them at scale. This diversity reflects the evolving nature of learning as a strategic capability.




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Making AI work: key success factors and common pitfalls

AI is no longer a distant promise—it's already reshaping how learning is designed, delivered, and experienced. And yet, successful integration requires a deliberate orchestration of foundational enablers, strategic drivers, and human-centred factors. When these align, AI becomes a catalyst for meaningful learning transformation. When they don't, even the most promising pilots risk stalling before they scale.

User-centric design: making AI work for learners

AI in learning often sparks excitement for its technical sophistication—but advanced algorithms alone don't guarantee success. What truly matters is how well AI empowers learners: delivering experiences that feel intuitive, personalised, and aligned with individual goals. When tools feel imposed or hard to navigate, engagement drops—no matter how impressive the technology behind them. High-performing organisations treat user experience as a strategic priority. Personalisation and autonomy are the guiding principles: learners should be able to choose what to use, how much to use, and when to engage. This flexibility builds trust and drives adoption.



I think it's important to remember that when you're a learner, you don't really care what kind of technology is behind the scenes. What matters is the value you get from the learning or development experience. So for me, user experience is absolutely critical.

T. Christofidis, Global Learning & Development Lead, Bayer

The benchmark for usability is no longer set by enterprise systems—it's shaped by the seamless digital tools people use in their personal lives. If workplace learning fails to meet those expectations, it risks being ignored. AI must therefore be designed not just to deliver content, but to create meaningful, frictionless experiences that learners genuinely want to engage with.



Organisational readiness: turning AI potential into practice

Designing for the learner is essential, but even the most intuitive AI tools will fail without organisational readiness. To turn potential into practice, organisations need the right infrastructure, high-quality data, and a shared understanding of AI's role in learning.

Technical readiness is critical. This means having the right infrastructure, high-quality data, and integrated systems. Fragmented platforms and inconsistent data remain persistent barriers—especially since data is the lifeblood of AI. When internal systems lack accuracy or accessibility, employees turn to external sources, eroding trust and undermining the very foundation AI depends on. Addressing these challenges requires more than technical fixes; it demands cross-functional collaboration, modernised infrastructure, and clear governance around data quality. AI initiatives thrive when infrastructure is treated as a core enabler of transformation, not a peripheral IT concern.

Cultural readiness matters just as much. Organisations that foster openness, experimentation, and digital confidence are better positioned to adopt AI at scale. Leadership plays a pivotal role—not only by approving initiatives but by visibly championing them. Adoption accelerates when leaders model AI use and create space for experimentation. Without this top-down reinforcement, even well-designed initiatives may struggle to take off.

Finally, clarity and guardrails are essential. Employees need to know who can use AI, for what purpose, and within which boundaries. Without this, uncertainty leads to hesitation or misuse. Organisations that provide structured guidance—especially around personalisation and data use—create the conditions for confident, responsible engagement.

We need clear rules—what can I use, for which purpose, and benefit. That's how we build trust.

N. Nolte, Manager Personnel and Organizational Development, B.Braun





Value-driven AI adoption: from novelty to impact

As AI capabilities expand, organisations face a growing challenge: distinguishing between what is genuinely valuable and what is simply new. The most effective strategies are not defined by the volume of tools deployed but by the clarity of purpose behind them.

Leading organisations are shifting from broad experimentation to focused execution. Rather than chasing novelty, they prioritise a small number of high-impact use cases that are executed precisely and aligned with business goals. This disciplined approach enables teams to demonstrate tangible outcomes, build credibility, and scale what works.

Fundamentally, AI adoption succeeds when it solves real problems. Whether customising learning content, improving access to development opportunities, or supporting strategic workforce planning, the key is relevance. AI initiatives move beyond hype and deliver measurable impact when they are anchored in business priorities and learner needs.

This shift reflects a broader maturity curve from testing possibilities to delivering value. Organisations that embrace this mindset position AI not as a trend to follow, but as a tool to drive meaningful transformation.

Skills, mindset, and enablement: empowering people to use AI responsibly

The integration of AI into learning is not just a technological shift—it's a human one. Success depends on how individuals engage with intelligent systems, apply judgement, and grow their capabilities over time. Organisations that foster adaptability, curiosity, and a readiness to explore new tools are better positioned to unlock AI's full potential.



I believe the most important thing when I think about AI is that we do not just blindly feed it information and trust it!

J. Richter, Global Head of Talent Development, Infineon

Data protection is an important topic, and the decision about what and how much individuals want to disclose—and what gets stored—should be adaptable. Interestingly, cultural attitudes differ: for example, our Chinese colleagues demonstrate far greater openness to technology and more routine in using AI for learning.

H. Peter-Regar, Senior Vice President Qualification and Learning, Schaeffler

Confidence in using AI must be paired with critical thinking. Technical proficiency alone is insufficient; what matters is how individuals engage with AI outputs. Employees need to understand not only how to operate AI tools but also how to interpret results, challenge assumptions, and apply insights responsibly. Across organisations, there is a growing emphasis on cultivating a mindset of thoughtful scepticism: one that embraces innovation while maintaining human oversight.

This mindset, marked by curiosity, discernment, and a keenness to question, is essential to ensuring AI supports human judgement, rather than overrides it. When individuals approach AI with both confidence and critical awareness, it becomes a tool to augment—not automate—learning and decision-making.

Enabling responsible AI use requires more than formal training. Leading organisations are investing in strategic enablement approaches that combine structured learning with experiential opportunities. Hands-on exploration, peer exchange, and informal support mechanisms are increasingly recognised as critical levers for adoption. Internal communities, guided prompts, and targeted coaching help build both competence and confidence, ensuring that employees not only understand the tools but can apply them meaningfully in their work.

When AI is positioned as a tool to enhance human strengths—not replace them—it becomes a source of empowerment rather than anxiety. Organisations that invest in skills, confidence, and enablement lay the foundation for impactful AI adoption in learning.

Governance and compliance: the cornerstone of scalable AI in learning

As organisations integrate AI into learning, governance emerges as a non-negotiable foundation. Legal compliance, data privacy, and ethical safeguards are not peripheral concerns; rather, they are central to building trust and ensuring long-term viability.

This is particularly critical in regulated environments, where alignment with both internal policies and external mandates must be established from the outset.

Every time we take a leap forward technologically, we have to make sure we're staying within the boundaries of what's responsible and secure. That includes how we use data, how AI interacts with it, and how people engage with these tools.

T. Christofidis, Global Learning & Development Lead, Bayer



Far from being a constraint, responsible governance enables innovation. It provides the structure within which AI can scale securely and credibly. Leading organisations embed legal and compliance teams early in the design process, ensuring that risk management and strategic enablement go hand in hand.

Clarity around what AI is permitted to do, how decisions are made, and who remains accountable is essential. Without this, even the most promising tools may struggle to gain traction. When governance is proactive and transparent, it becomes a strategic lever that lays down the groundwork for trust, adoption, and long-term impact.

From barriers to breakthroughs: tackling AI challenges in learning

	Hurdles	How to overcome
User-centric design	<ul style="list-style-type: none"> • Complex, inflexible tools reduce learner engagement • Limited personalisation and autonomy lower acceptance • Learning platforms fall short of digital expectations 	<p>Prioritise intuitive, personalised experiences</p> <p>Design intuitive, flexible, and personalised experiences that meet user expectations.</p>
Organisational readiness	<ul style="list-style-type: none"> • Fragmented systems and poor data quality limit impact • Insufficient technical infrastructure slows progress • Leaders fail to signal AI's strategic relevance 	<p>Treat data quality and platform integration as strategic priorities – not IT afterthoughts</p> <p>Modernise infrastructure and foster cross-functional collaboration.</p>
Value-driven adoption	<ul style="list-style-type: none"> • Too many tools without clear purpose cause fragmentation • Lack of prioritisation of high-impact use cases reduces measurable outcomes 	<p>Focus on high-impact use cases aligned with business goals</p> <p>Demonstrate tangible value through disciplined execution and measurable outcomes.</p>
Skills, mindset, and enablement	<ul style="list-style-type: none"> • Low confidence and critical thinking limit responsible AI use • Missing learning opportunities and peer support hinder skill development 	<p>Invest in enablement through hands-on learning, peer exchange, and coaching</p> <p>Promote human-AI collaboration supported by responsible adoption practices.</p>
Governance and compliance	<ul style="list-style-type: none"> • Unclear legal frameworks undermine trust • Lack of transparency and accountability hinders scalability • Late involvement of compliance teams increases risk 	<p>Embed governance early in the design process</p> <p>Involve legal and compliance teams from the start. Ensure transparency and accountability to build trust and scalability.</p>

05

From pilots to platforms: scaling AI in learning

AI has moved beyond experimental pilots in L&D. It is now a foundational enabler of how organisations worldwide design, deliver, and scale learning experiences. As competitive pressure accelerates digital transformation, AI becomes a catalyst for deeper, faster change across the learning ecosystem.

Our research confirms this trajectory. All interviewed organisations have begun implementing AI solutions, though with varying levels of maturity.

Generative AI will fundamentally transform our working environment. The exact ways in which this will happen are still difficult to predict in detail. We need to reduce apprehensions and highlight opportunities through our Learning & Development programs - also by incorporating AI into our own tools.

**I. Koenneker, Division Manager
Learning Experience,
Otto Group**

Personalisation at scale: AI-driven learning journeys

AI enables adaptive learning experiences tailored to individual roles, skill levels, and aspirations. This personalisation enhances engagement, retention, and relevance, especially in fast-changing environments where traditional training models fall short.

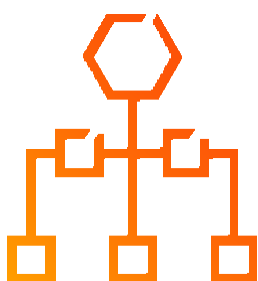
Learning experience platforms (LXPs) play a central role in this transformation. These platforms assess individual skill profiles, identify gaps, and recommend targeted learning interventions aligned with both personal goals and business priorities. At Merck, an AI-powered platform, built on a comprehensive skills framework, matches employees' skills with development and career opportunities. Similarly, Bayer is using Degreed, leveraging the big opportunity in AI to match people's needs with the appropriate learning at the right time.

AI-powered chatbots and virtual learning assistants further personalise the experience. These tools simulate human-like interactions, support skill development and foster immersive learning through conversational interfaces, microlearning, and intelligent feedback loops.

Infineon illustrates this approach by implementing a virtual, on-demand coaching platform as part of its learning ecosystem, supported by an AI-powered chatbot for a simple and engaging interface. The chatbot helps employees book sessions, suggests tailored coaching options, and provides instant guidance, creating a seamless experience. For senior leaders, curated executive coaching with selected experts ensures tailored development within a clear framework. This combination of human expertise and conversational AI demonstrates how organisations can amplify coaching, lower barriers to growth, and embed continuous learning into everyday work.

Otto Group's internal AI bot “LIA,” built on a customised ChatGPT interface, exemplifies the development towards customisation further. LIA provides personalised learning support and, dynamic recommendations, marking the beginning of adaptive, multi-dimensional learning workflows. In practice, the Otto Group has rolled out a GenAI-based learning assistant to enhance visibility of its diverse learning portfolio and offer personalised recommendations across a decentralised organisation. The assistant was made available to all employees from the outset, encouraging rapid adoption and building trust through ease of use.

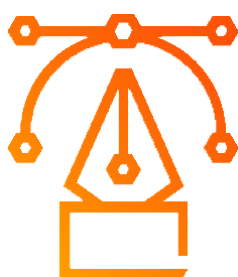
Bayer is piloting AI agents in the field of learning and development helping employees to better define their development opportunities. These early-stage initiatives aim to move beyond generative AI towards “authentic AI”, systems that understand context and intent to deliver truly adaptive learning journeys.



Reinventing knowledge management with AI

AI transforms static knowledge repositories into dynamic, personalised systems. By leveraging generative AI, machine learning, and natural language processing, employees and managers can instantly access accurate, structured information tailored to their needs.

At Infineon, generative AI enables real-time access to HR knowledge. Employees can ask specific questions (e.g. “What are the work regulations for my employee in India?”) and receive precise, context-aware answers. To support this functionality, HR content was migrated from visually rich pages to structured knowledge articles, optimising it for AI processing and retrieval.



Accelerating content creation and delivery

AI is also revolutionising how learning content is created and scaled. It automates repetitive instructional design tasks, accelerates training production, and enables multilingual content generation—allowing L&D teams to respond quickly to business demands while maintaining quality and consistency.

An international supplier of the automotive industry developed a set of standard prompts and guidelines to scale content creation, enabling teams to produce consistent, didactically sound training materials efficiently. Their internal frameworks ensure quality and alignment while supporting the faster development of learning content across the organisation.

At **B. Braun**, AI tools are used in selected pilot areas to automate the production of learning videos. These tools generate content from structured inputs, reducing the need for studio production and enabling faster turnaround times. Integrations with providers like Skillsoft offer interactive, AI-enhanced modules that adapt to user responses in real time.

AI in action: five game-changing use cases for L&D

1

Personalise learning at scale

Deliver tailored learning journeys with adaptive content and development paths aligned to individual skills and goals.

2

Unlock knowledge

Provide instant access to organisational knowledge via intelligent agents or chatbots—available anytime, anywhere.

3

Accelerate content creation

Use AI tools for video, design, and curation to produce high-quality, multilingual materials quickly and at scale.

4

Advance skills-based growth

Analyse skills and match employees with personalised learning, mentoring, and career opportunities to drive development.

5

Drive learning impact with data

Leverage AI analytics to monitor effectiveness, engagement, and outcomes in real time for continuous improvement.

Graph 3

Closing the loop: AI in analytics and impact measurement

Despite these advances, AI is not yet embedded across the entire learning life cycle. In many organisations, its use is limited to specific touchpoints, such as content recommendation or search, while other areas like skill mapping or performance analytics remain manual or disconnected. To unlock full value and overcome fragmented adoption, organisations need a holistic AI strategy that connects needs assessment with impact measurement. AI-powered analytics can identify skill gaps, forecast future learning needs, and measure training effectiveness. These insights can empower L&D leaders to align learning strategies with business goals and make data-driven decisions for performance and innovation.



06

The human factor: why people still matter

As organisations integrate AI into their learning functions, a clear pattern emerges: while technology can personalise, scale, and automate learning, it cannot replace the human dimension. The future of learning will not be defined by technology alone—it will be shaped by how effectively organisations enable collaboration between humans and machines. The key will be to find the right balance.

To achieve this, learning ecosystems are evolving into hybrid models where AI handles operational tasks such as content curation, skill gap analysis, and scenario simulation. Meanwhile, the emotional depth, contextual relevance, and behavioral impact of learning continue to rely on human interaction.

If you look across the full spectrum of how people develop, the most impactful learning experiences almost always involve a human element. Even something as foundational as feedback—arguably one of the most powerful development tools—requires human input.

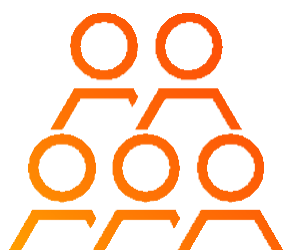
T. Christofidis, Global Learning & Development Lead, Bayer



This is particularly evident in areas where emotional intelligence and storytelling play a central role. The ability to convey vision, foster enthusiasm, and create meaning through narrative remains uniquely human. Whether in leadership development or peer-to-peer learning, emotional resonance is a key driver of engagement and transformation—something AI cannot replicate.

It's really the deeply human facets I believe in. An AI can't get angry, it can't be enthusiastic, it can't vividly convey a vision.

J. Richter, Global Head of Talent Development, Infineon



Moreover, face-to-face learning formats continue to hold value, especially in environments where practical skills, interpersonal exchange, and real-time feedback are essential. In production settings, healthcare, and leadership programmes, in-person interaction enables deeper learning, stronger relationships, and more immediate application. While digital tools offer scale, they are not a one-size-fits-all solution.

The role of HR as a strategic partner is also being redefined, not diminished. As AI takes on operational tasks, HR remains critical in guiding people through transitions, shaping learning cultures, and supporting growth journeys. Human resource functions are increasingly focused on enabling reflection, contextualisation, and ethical alignment—areas where human judgement is indispensable.

Indeed, the ability to evaluate and interpret AI outputs is emerging as a core human capability. Organisations recognise that without critical thinking and contextual understanding, AI-generated insights risk being misapplied. Human expertise ensures that learning remains relevant, responsible, and aligned with organisational values.

Ultimately, the integration of AI in learning is not a question of replacement but of rebalancing. Organisations that succeed will be those that design development experiences where human and machine intelligence complement each other—creating a learning journey that is personalised, efficient, and impactful.

07

The new skill set for learning architects

To remain competitive, L&D teams must evolve. In the past, L&D professionals were primarily valued for their expertise in instructional design, content delivery, and programme coordination, focusing on operational efficiency, curriculum development, and classroom facilitation. However, this is no longer sufficient.

Today's L&D function is undergoing a profound transformation, moving from being training providers to strategic enablers of performance. This evolution demands a new set of capabilities to embrace business alignment and data and technology fluency, as well as strong human-centred skills such as empathy, collaboration, and storytelling. As part of this shift, AI becomes a critical ally. Tools like GPTs can act as sparring partners, helping L&D professionals to reflect on and refine their ideas. AI is a powerful enabler, with tools like GPTs serving as sparring partners for idea refinement. But with this power comes responsibility. Governance of learning technologies, once the domain of IT, now requires joint ownership. L&D teams must work hand-in-hand with IT to define guardrails that balance innovation with compliance and trust.

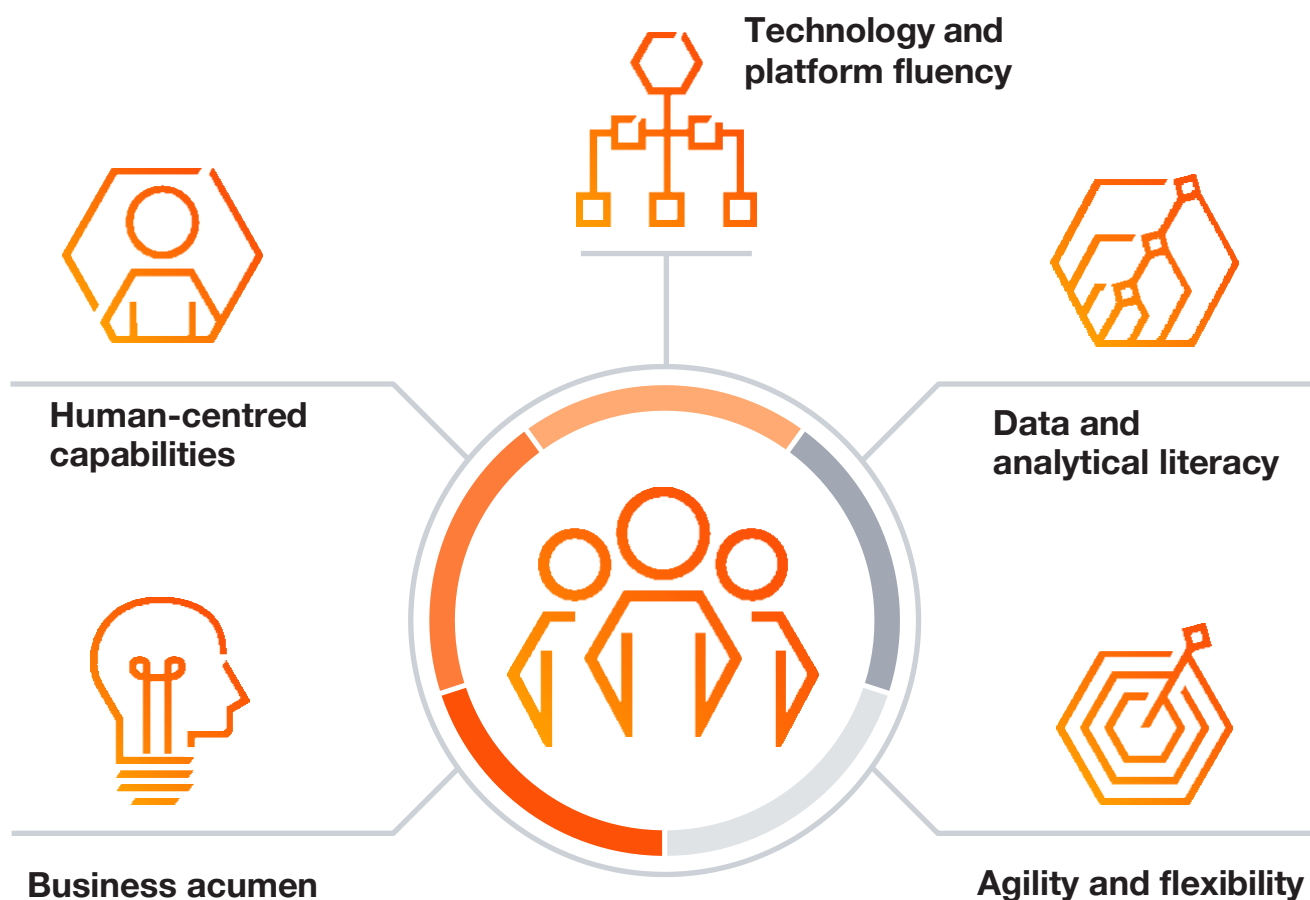
At Schaeffer Academy, we also notice how we are working more closely and more frequently with HR systems and IT & Digitalisation to reach our goals.

H. Peter-Regar, Senior Vice President Qualification and Learning, Schaeffler

This shift can be understood as a three-stage progression:

Yesterday	Today	Tomorrow
<p>Yesterday's L&D operated as training providers, with roles like trainer or instructional designer focused on course delivery, content creation, and (system) administration.</p>	<p>Today's L&D functions as performance consultants and learning experience designers, aligning learning with business outcomes and designing learner-centric experiences.</p>	<p>Tomorrow's L&D will be AI-augmented coaches and transformation architects, blending human empathy with AI-driven customisation to embed learning into the flow of work and drive continuous enablement.</p> <p>This aligns with the findings of our research, as interviewees consistently highlighted several key skills that are crucial for L&D professionals to remain competitive:</p>

The skill set shift: what makes learning teams thrive



Business acumen

Align learning objectives with organisational goals

Understand business drivers, stakeholder expectations, and performance metrics to act as strategic partners.

Human-centred capabilities

Understand learner needs to enable inclusive, engaging environments.

Apply empathy and emotional intelligence to translate insights into impactful, learner-centred experiences.

Technology and platform fluency

Stay current with emerging technologies (AI, ML, mobile learning).

Guide hybrid workflows and create AI prompts.

Enhance user experience and ensure seamless integration of learning tools.

Data and analytical literacy

Interpret analytics to assess impact, identify skill gaps, and make evidence-based decisions.

Design data-driven learning solutions and track development in the flow of work.

Agility and flexibility

Respond quickly to shifting priorities.

Use agile methods and rapid experimentation to adapt learning initiatives to change.

Continuously improve programmes through feedback and iteration.

Graph 4

The more machines support us, the more human we need to be in human interactions.

J. Richter, Global Head of Talent Development, Infineon



As AI reshapes the learning landscape, L&D professionals must become architects of transformation, strategically aligning learning with business goals, leveraging data, mastering emerging technologies, and designing human-centred experiences. This means the composition of learning teams will change, requiring more senior profiles that are able to deal with complex issues.

As learning teams take on more strategic responsibilities, their success hinges on deep integration with business priorities. Julia Lamm (PwC Senior Partner) echoes this view, emphasising the need for close collaboration with the business to ensure learning initiatives drive measurable impact. Skill data analysis plays a critical role in this process, as it enables a deeper understanding of workforce capabilities and guides strategic learning investments. By aligning learning with determined skill requirements and using data to measure impact and adapt as needed, L&D moves beyond traditional content creation towards becoming a true enabler of organisational transformation.

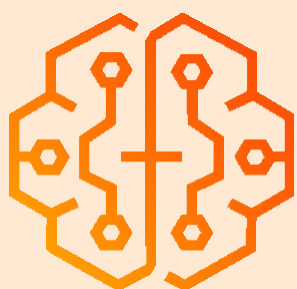
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Strategic implications for organisations

AI is redefining learning—not replacing it. The organisations that will lead in this new era are those that combine technological innovation with human-centred design, ethical governance, and a culture of continuous learning. The challenge is not simply to adopt AI, but to embed it thoughtfully—enhancing development journeys and driving meaningful growth. This means ensuring that AI augments, rather than replaces, human judgement and interaction.

It calls for leaders who understand that learning is no longer a support function but a vital capability. The strategic imperative is clear: organisations must build learning ecosystems that are agile, inclusive, and data-driven. AI can accelerate this journey—but only if it's embedded thoughtfully and aligned with human values.

What this means for HR leaders



Audit your learning ecosystem for AI readiness:

Assess infrastructure, data quality, and governance frameworks to ensure a strong foundation.

Build trust in AI systems:

Transparency, compliance, and clear guardrails are essential to foster confidence and adoption.

Empower L&D teams as transformation architects:

Move beyond content delivery to designing immersive, AI-enabled experiences aligned with business priorities.

Focus on high-impact use cases:

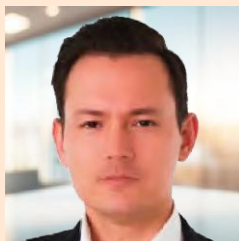
Prioritise initiatives that solve real business problems and deliver measurable outcomes.

Invest in human capabilities:

Cultivate critical thinking, adaptability, and empathy to complement AI-driven learning. This will require upfront investments that will pay off in the long run.

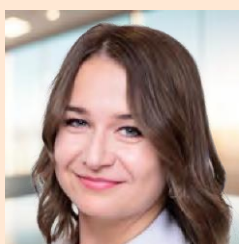
The pace of change will not slow down. Organisations that act boldly and intentionally—combining machine intelligence with human insight—will not only keep pace with transformation, they will shape its future.

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