AI Tennessee SUMMIT

CONVENING TENNESSEE'S LEADERS TO WIN THE AI RACE

MARCH 25–26, 2026

NASHVILLE, TENNESSEE

HOST ORGANIZATIONS

The University of Tennessee Knoxville
Vanderbilt University
The University of Memphis
Oak Ridge National Laboratory
SCORE
TN
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AI disclosure: This report was prepared based on the full transcript of the inaugural AI Tennessee Summit (March 25–26, 2026). Artificial intelligence tools were used in a supporting role to assist with summarizing recorded content. All outputs were reviewed, edited, and validated to ensure accuracy, context, and alignment with the intent of the Summit.

EXECUTIVE SUMMARY

The inaugural AI Tennessee Summit was held March 25–26, 2026 in Nashville. The Summit convened leaders from across the state to align Tennessee's strategy for artificial intelligence at a pivotal moment of national and global competition. Organized by a coalition of higher education institutions, state government, national laboratories, non-profit organizations, and Tennessee-based companies with global brands, the Summit was designed to move beyond fragmented efforts and establish a shared vision for positioning Tennessee as a national leader in AI adoption, infrastructure, and innovation. At its core, the Summit emphasized that AI is critical infrastructure that will shape the state's economic competitiveness, workforce, and public services for decades.

This broad representation reinforced a central theme echoed throughout the event:

TENNESSEE'S UNIQUE STRENGTH LIES IN ITS ABILITY TO CONVENE AND ALIGN ACROSS SECTORS.

BY THE NUMBERS

500 Attendees

representing government, academia, industry, startups, and nonprofit organizations

64 Speakers

across 26 sessions

13 Companies

expressed interest in joining AI TechX (AI Tennessee's industry consortium) following the event.

95%

of post-event survey respondents said they would return next year

All Summit photography: Steven Bridges, UT

FOUR OVERARCHING THEMES EMERGED:

1. INFRASTRUCTURE

Energy, advanced computing, data infrastructure, and AI capacity were identified as both Tennessee's greatest competitive advantage and its most pressing challenge.

2. TALENT PIPELINE

From K–16 education through workforce preparation and upskilling, the ability to effectively work within AI-enabled environments is becoming essential across nearly every sector. Building a strong pipeline requires alignment among education, industry, and workforce needs.

3. INDUSTRY PARTNERSHIP AND ECONOMIC COMPETITIVENESS

Stronger coordination among established industries, startups, research institutions, and government is needed to accelerate AI adoption, expand innovation, and translate technological advances into economic growth and high-quality jobs.

4. RESEARCH AND INNOVATION

Tennessee is emerging as a global leader in AI-driven discovery by leveraging a research ecosystem spanning national laboratories, research universities, and industry partnerships to translate scientific advances into real-world impact.

These themes were underpinned by a fifth cross-cutting priority: **policy and state leadership** to ensure responsible, coordinated, and scalable adoption.

Across discussions, two ideas became defining principles throughout the two-day Summit. The first was a call for **"radical collaboration,"** captured by University of Tennessee Chancellor Donde Plowman: "We've got to think radically different about how we partner, how we collaborate, and how we achieve the goals that the state of Tennessee needs." The second was a shared vision of leadership grounded in trust and coordination, what national AI leader Dr. Lynne Parker described as "**the Tennessee way**... leading with people, trust, and collaboration at scale."

LETTER FROM THE EXECUTIVE DIRECTOR

First, I want to express my sincere gratitude to everyone who participated in our inaugural AI Tennessee Summit. Whether you joined us as an attendee, sponsor, panelist, partner, or presenter, thank you for helping shape Tennessee's next chapter in AI. The conversations we had are not just timely; they are essential to positioning our state as a national leader in the global AI economy.

The Summit produced a clear call to action. America has a unique opportunity to lead the world in AI, but leadership will not happen by chance. It will require bold vision, sustained investment, and unprecedented collaboration across government, academia, industry, and our national laboratories.

Tennessee is already on the national stage. The Department of Energy's Genesis Mission has brought federal investment to the state, and the U.S. Chief Technology Officer's participation in the summit underscores Tennessee's growing relevance in national technology priorities. Moreover, the Knoxville/ORNL, Chattanooga/EPB, Digital Delta's Memphis, and Nashville corridors were recognized as national models for regional AI innovation ecosystems.

One message that emerged consistently throughout the Summit is that AI competency is absolutely necessary. From K-12 education to higher education and the existing workforce, the ability to work effectively and responsibly with AI must become the new standard. With approximately 3.5 million Tennesseans requiring AI upskilling and AI-fluent professionals already commanding significantly higher wages, the urgency is clear. We must build coordinated education and workforce pathways that span K-12, TCATs, TBR institutions, universities, and industry.

The Summit also reinforced that Tennessee is not building an AI ecosystem from scratch. We already possess world-class assets that few states can match: Oak Ridge National Laboratory, the Tennessee Valley Authority, Y-12, outstanding universities, innovative industries, abundant energy resources, and exceptional talent. Combined with more than $10 billion in energy investments already underway, our competitive advantage lies not only in creating new assets, but also in connecting and aligning the ones we already have.

Achieving this vision will require stronger statewide coordination. We must establish durable mechanisms that bring together state government, higher education, national laboratories, industry, and local communities around shared priorities, measurable outcomes, and long-term accountability. This includes continued investment in AI infrastructure and workforce development, policy frameworks aligned with the Tennessee AI Advisory Council Action Plan that foster innovation while maintaining public trust, and stronger public-private partnerships that accelerate the translation of research into economic growth.

Tennessee does not need to build a new AI ecosystem. It already has one. Our challenge now is to mobilize it with purpose, coordination, and urgency. AI Tennessee stands ready to serve as the statewide convener for AI research, education, workforce development, and innovation as we work together to position Tennessee as a national leader in artificial intelligence.

Vasileios Maroulas, PhD
Executive Director, AI Tennessee
Associate Vice Chancellor, University of Tennessee, Knoxville

LOOKING AHEAD — THE AI TENNESSEE VISION

Over the next three to five years, Tennessee will transition from a state with exceptional, individual AI assets into a globally recognized, deeply integrated AI powerhouse. The vision is clear: **Tennessee will not just participate in the AI economy; it will lead it**. We talked about radical collaboration, but now it's time for radical execution.

For Tennessee, "winning" the AI race means becoming a **net exporter** of AI-enabled solutions. It looks like a state where our unmatched infrastructure, powered by advanced nuclear energy and quantum networks, seamlessly meets the immense compute demands of the future. Winning means our workforce is ready, with **AI fluency** established as a baseline expectation from K-16, successfully upskilling 3.5 million workers. Ultimately, winning is realizing the promise of initiatives like the Genesis Mission to accelerate scientific discovery, proving that trust-based, responsible AI adoption drives undeniable economic competitiveness.

AI Tennessee's role in this future is to be the engine of **radical collaboration**. We do not need to build a new ecosystem from scratch; our mandate is to align the world-class institutions we already have. By serving as the connective tissue between state government, national laboratories like ORNL, academia, and industry, AI Tennessee will break down silos and coordinate action. We will ensure that our shared momentum translates into real-world applications, job growth and policy leadership- positioning Tennessee as a national model for AI innovation.

AI TENNESSEE SUMMIT IMPACT AND ATTENDEE INSIGHTS

The inaugural Summit drew **500 attendees**, reflecting strong statewide interest in artificial intelligence and its applications across sectors. The cross-sector composition of registered participants reflected the Summit's intentional design: of 840 total registrants, 41% represented industry, 32% came from higher education and academic institutions, 20% from government, and 7% from nonprofit organizations. The program featured **64 speakers** across **26 sessions and panels**, covering topics ranging from statewide infrastructure, workforce talent pipeline, research, and policy. Notably, **100 attendees** participated in the Governor's Dinner, underscoring the event's significance at the highest levels of state leadership. The Summit also generated direct organizational interest, with **13 companies** expressing intent to join TechX following the event.

SUMMIT REACH & MEDIA IMPACT

The Summit's influence extended well beyond the walls of the venue. Coverage of the inaugural AI Tennessee Summit generated **87 pieces of media coverage** reaching an estimated 1.16 million views. The estimated combined publication-wide audience across all outlets featuring coverage totaled 8.6 million, reflecting the broad reach of the media landscape that took notice. Together, these figures signal that the conversation started in Nashville resonated far beyond it, amplifying Tennessee's emerging identity as a national leader in AI adoption, infrastructure, and innovation.

WHAT ATTENDEES SAID

Attendees consistently described the Summit as **well-organized, impactful, and highly valuable**. The agenda flow, speaker quality, and overall professional execution were among the most frequently cited strengths in survey responses.

A standout element was the intentional cross-sector composition of the program. The deliberate inclusion of industry leaders, startups, government representatives, and higher education institutions created meaningful networking opportunities and substantive dialogue that attendees found difficult to replicate elsewhere. As one attendee noted: “Pulling together higher ed, government, and industry is no small feat… I was deeply impressed by the level of quality from many of the presenters and panels.”

One attendee said it best:

> **“THE AI TENNESSEE SUMMIT WAS A RESOUNDING SUCCESS, CHARACTERIZED BY A BOLD VISION AND AN IMPRESSIVE ROSTER OF SPEAKERS WHO DELIVERED TRULY ACTIONABLE INSIGHTS.”**

AREAS FOR GROWTH

While feedback was overwhelmingly positive, a consistent theme emerged around the desire to move beyond high-level discourse and toward **applied content** — specifically, real-world use cases, implementation strategies, and concrete calls to action. Attendees also expressed interest in more **structured engagement opportunities**, such as roundtable discussions, breakout sessions, sector-based networking, and greater post-session access to speakers.

TENNESSEE'S AI LANDSCAPE

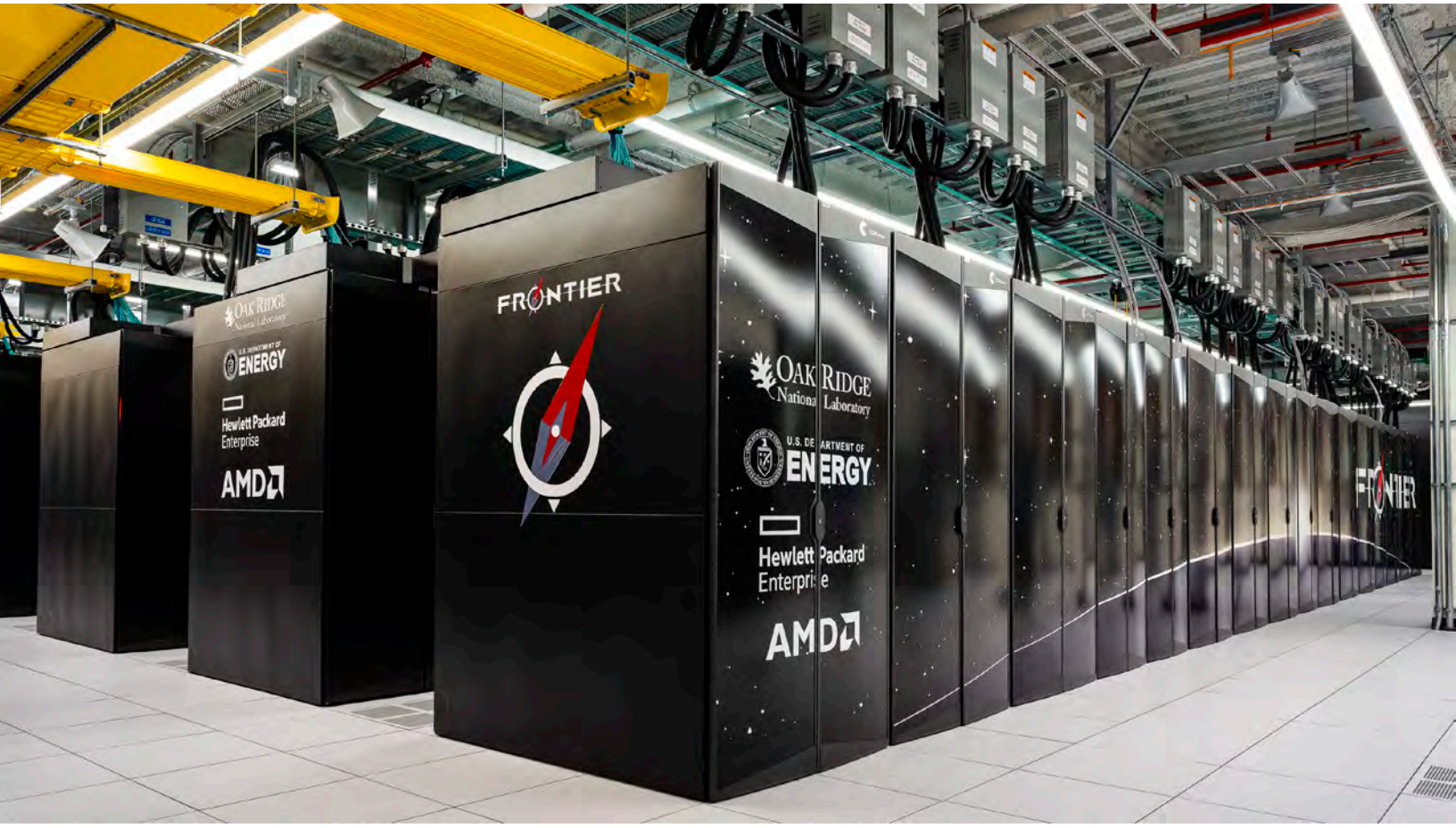
Tennessee arrives at this moment not as an aspiring participant in the national AI race, but as a state with the assets, alignment, and momentum to lead it. The inaugural Summit made that case with data.

The foundation begins with infrastructure. Tennessee is home to Oak Ridge National Laboratory, whose AI heritage dates to 1979 and whose Frontier supercomputer remains one of the world's most powerful AI research platforms. The capacity is only growing, with ORNL adding two new supercomputers, with Lux set to commission this summer (2026). The state has 12+ nuclear projects underway, $10 billion in capital investment in energy, and a recently announced U.S.-Japan $40 billion SMR commitment, with significant activity expected at Oak Ridge's Clinch River site. TVA's stable, diverse power mix and EPB's fiber and quantum network in Chattanooga round out an energy and connectivity infrastructure that no other state can replicate. Broadband access has improved dramatically, with the share of Tennesseans lacking high-speed internet falling from 20% to under 2% since Governor Lee took office.

The economic picture is equally compelling. Deputy Governor and Economic and Community Development Commissioner McWhorter framed Tennessee's advantage not as isolated excellence, but as coordinated momentum across sectors. Nashville is a global healthcare capital. The state is home to four automotive Original Equipment Manufacturers (OEMs) and thousands of suppliers. 75% of the U.S. population sits within a day's drive, making Tennessee the geographic center of the national supply chain. AI-related data center load already represents 18% of TVA's total load and is forecast to double within five years, signaling the scale of private sector confidence in the state.

Finance & Administration Commissioner Bryson grounded the opportunity in operational reality. By early 2025, 50% of state employees were already using AI tools informally, a signal not of risk alone, but of appetite. The state has responded with structured investment: 5,300 employees voluntarily trained, an AI Steering Committee established, and an approved Governor's budget committing $38.5 million for state AI infrastructure, $43 million for quantum networking, and $25 million for nuclear technology development.

Dr. Lynne Parker, Former Principal Deputy Director of the White House Office of Science and Technology Policy (OSTP), drew on her experience across multiple presidential administrations to reframe the competitive question entirely. Tennessee is not competing to build the largest models or the fastest chips. It is competing to win the adoption race, using AI well across institutions, sectors, and communities. Its nuclear energy sector, built through community trust, intentional workforce development, and aligned institutions, is the proven blueprint. “When people across the country ask, ‘How do you actually do AI right?’ the answer will be, ‘You do it the Tennessee way.’”



That assessment was echoed by the Chief Technology Officer of the White House OSTP, Dr. Ethan Klein, who specifically cited the Knoxville/ORNL, Chattanooga/Vanderbilt/EPB, and Nashville corridors as national models for regional innovation clusters. His message to the room was direct: the AI race will not be decided in Washington alone. “Tennessee has always been a state that volunteers first, and America has always been stronger for it. We’re asking Tennessee to volunteer once more.”

The convergence of research infrastructure, energy capacity, cross-sector alignment, and state-level commitment places Tennessee in a position few states can claim. The question the Summit was convened to answer was not whether Tennessee belongs in this conversation; it was how Tennessee leads it.

THEMES & BIG IDEAS

THEME 1: INFRASTRUCTURE AS A STRATEGIC ASSET

AI CAPABILITIES, ENERGY (NUCLEAR, TVA, EPB), AND COMPUTING CAPACITY

Tennessee's AI ambitions rest on a foundation of **physical infrastructure** that is simultaneously its greatest competitive advantage and most pressing need.

- AI-related data center load represented 18% of TVA's total load in 2025 and is forecast to double within five years; standard requests now run 50 to 400 megawatts, a fundamentally different scale from traditional industrial loads.
- Transmission timelines of 7 to 10 years must be compressed to 2 to 4 years through parallel planning and permitting reform; regulatory agility was identified as the single most important unlock.
- TVA's diverse power mix, Kairos Power's Hermes reactor at Oak Ridge, and EPB's quantum-ready fiber network in Chattanooga represent a convergence of energy, compute, and connectivity assets that no other state can match.
- 12+ nuclear projects, $10 billion in capital investment, and a U.S.-Japan $40 billion Small Modular Reactor (SMR) commitment signal long-term energy leadership.
- Water availability and national security resilience, including cyber threats and peak demand scenarios, were flagged as emerging constraints requiring proactive planning.
- The Governor's proposed budget commits $38.5 million for AI infrastructure, $43 million for quantum networking, and $75 million for nuclear technology development.
- **Panelists discussed that power is a strategic asset now.**

THEME 2: TALENT PIPELINE — FROM K-12 TO WORKFORCE

EDUCATION, UPSKILLING, COMMUNITY COLLEGES, AND THE PRESIDENTIAL AI CHALLENGE

Tennessee has the **institutional infrastructure** to build a world-class **AI talent pipeline**, but scale, equity, and coordination remain the defining challenges.

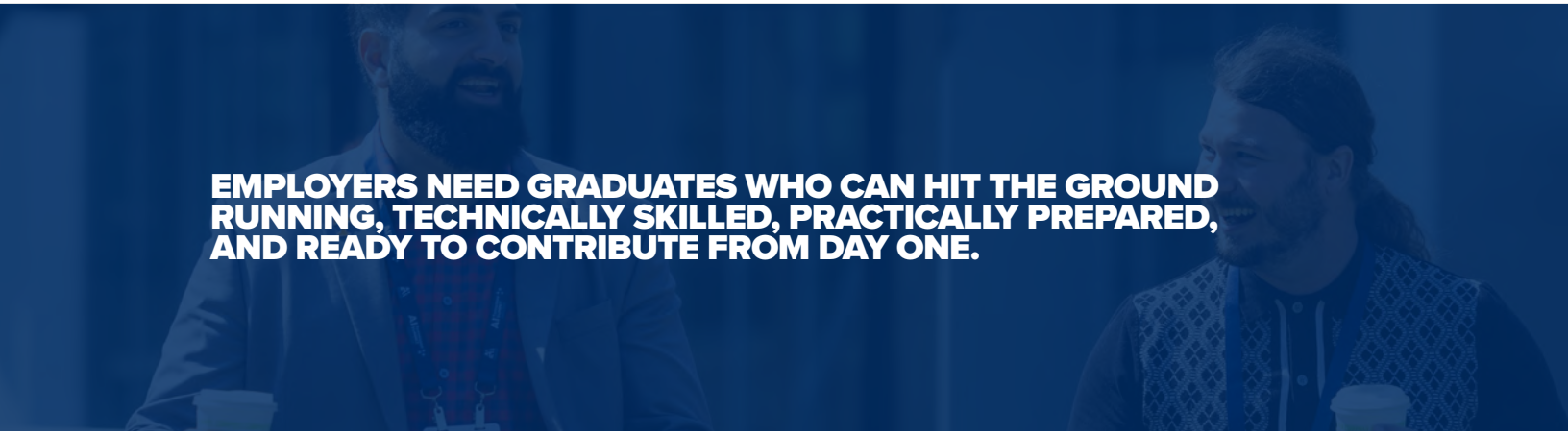
- An Axios study cited by panelists found that 170 million new occupations are expected globally by 2030; AI-fluent workers already earn 56% more than peers, making fluency the next driver of income inequality.
- Tennessee must upskill 3.5 million workers at role-appropriate AI fluency levels; habit formation, not one-time training, is the key to adoption.
- China is mandating AI basics by 3rd grade, data and coding by 4th grade, and intelligent agent development by 5th grade — a sobering benchmark for urgency.
- Promising models already in motion: CodeCrew (16,000 students, adult graduates moving from $12K to $65K annually), Sumner County's use of Coursemojo, an AI tool showing measurable K-12 gains, and the Memphis/xAI partnership pre-vetting 200 candidates with on-site certification pathways.
- The Tennessee Board of Regents (TBR) is moving with urgency across its 35-college system: it has identified the 40 highest-enrollment courses for AI integration, completed AI training for more than 1,800 faculty, and through Southwest Tennessee Community College, launched the state's first Associate in Applied Science degree in AI.
- The greatest equity risk: rural and underserved communities left behind if adoption concentrates in urban centers.
- Consensus across both days: **All students should attain AI fluency before graduating, not just through computer science but with thoughtful application across subject areas.**

THEME 3: INDUSTRY PARTNERSHIP & ECONOMIC COMPETITIVENESS

WHAT INDUSTRY NEEDS, STARTUP ECOSYSTEM, AND WHY TENNESSEE IS WINNING

Tennessee's cross-sector culture and economic fundamentals make it a compelling destination for AI industry and startups but closing the capital gap and building human capacity are urgent priorities.

- AI is already delivering measurable value across Tennessee companies: documentation automation (Ernst & Young), ideation support (Hitachi), quality classification (Volkswagen), clinical diagnostics (Ballad Health), and ambient physician documentation (HCA).
- The critical gap is not technology but human engineering: trust, change management, and the "AI integration manager" skill set, someone who can apply judgment to AI output before it reaches operational decisions.
- The workforce gap is not a knowledge problem; it is an application problem.



- Tennessee's competitive advantages: geographic centrality, no state income tax, competitive energy costs, proximity to national labs, strong university system, and a "coalition of the willing" culture.
- The capital ecosystem is growing but incomplete; founders are still traveling to Florida, Georgia, and Silicon Valley; Launch Tennessee's Invest TN fund ($70M) catalyzes $4 to $5 in private capital for every $1 invested.
- Tennessee's ability to turn research into revenue is no longer aspirational. It is already happening. The UTRF Accelerate Fund's early investment in Visualize AI proved that the right institutional support at the right moment can be the catalyst that moves an idea from lab to market. Companies like Ship It Pro and Authentrics.AI are the result: Tennessee-born, export-ready AI companies competing and winning beyond state lines. This is precisely the ecosystem AI TechX's "From Lab to Market: Accelerating AI Innovation" event was designed to accelerate, connecting founders, researchers, industry, and investors around a shared conviction that startup support is not a peripheral priority. It is the engine of Tennessee's long-term economic competitiveness.
- Panelists emphasized the importance of focusing on a small number of strategic industry strengths, developing AI-driven solutions within those sectors, and positioning the region as a net exporter of innovation and expertise.

THEME 4: RESEARCH, INNOVATION & AUTONOMOUS DISCOVERY

ORNL, UT, AMD, Y-12, AND THE GENESIS MISSION

Tennessee's national laboratory and university ecosystem positions the state at the frontier of AI-driven scientific discovery, with implications that extend well beyond academia.

- The **Genesis Mission** connects DOE's 17 national laboratories with NSF, NIH, USDA, and other agencies to accelerate discovery; the potential impact is concrete: drug discovery timelines that currently take 12 years could be cut to 6.
- ORNL's Frontier supercomputer, once the world's fastest, is now predominantly dedicated to AI research; its autonomous chemistry lab runs 24/7 robotic synthesis of solid-state catalysts at a pace impossible for human researchers.
- UT built one of the first five automated labs in U.S. academia (2019) and is the first to deploy a fully autonomous instrument.
- Quantum computing has moved from hypothetical to applied: quantum chemical calculations are already identifying tritium species in molten salt compositions for nuclear applications, delivering results comparable to Frontier at a fraction of the energy and size.
- Tennessee's quantum ecosystem spanning Knoxville, Oak Ridge, Chattanooga, and Nashville have no national peers.
- The National Security Prototype Center at Y12, in partnership with UT and Roane State, is a replicable model for university, national lab, and community college collaboration
- Sergei Kalinin *(Weston Fulton Professor, University of Tennessee, Knoxville)* noted, "This is the biggest disruption factor in the way that we did science over the last 30 years."

THEME 5: POLICY, GOVERNANCE & STATE LEADERSHIP

STATE GOVERNMENT'S ROLE, THE TN AI ADVISORY COUNCIL, AND LEGISLATIVE ENGAGEMENT

Tennessee has moved from ad hoc AI adoption to structured, enterprise-level governance, and is increasingly cited as a national model, but **legislative engagement and statewide coordination remain critical needs**.

- By early 2025, 50% of state employees were using AI informally; the state responded with structured enablement: 1,000 ChatGPT licenses, Microsoft Copilot deployment, an AI Steering Committee, an AI Innovations Lab, and 5,300 voluntary training completions.
- At least 500,000 Tennessee jobs will be touched by AI in the near term; labor market data is already showing early signals of workforce shifts.
- Tennessee was cited as a model at the National Governors Association AI roundtable; the state's cross-sector ecosystem was referenced by federal speakers as a national example.
- Policy consensus across sessions: a principles-based, outcomes-focused regulatory framework is needed; AI literacy and adoption are matters of national security, not just economic competitiveness.
- Key legislative priorities surfaced: post-quantum encryption migration, data center utility rate guardrails, consumer privacy protections, and proactive engagement on bills like House Bill 2393 to prevent well-intentioned but counterproductive restrictions.
- The most critical near-term need: **better coordination mechanisms** between the institutions of Tennessee.

DAY-BY-DAY SESSION SUMMARIES

DAY 1 — MARCH 25, 2026

OPENING REMARKS

***Vasileios Maroulas**, Associate Vice Chancellor, University of Tennessee, Knoxville; Executive Director, AI Tennessee*

Maroulas opened the Summit with a framing that set the tone for everything that followed: AI is not a technology trend — it is critical infrastructure. The decisions Tennessee makes now, by action or inaction, will shape the state's economic competitiveness for decades. No single institution can achieve the necessary scale alone. The Summit was convened as the mechanism for the kind of cross-sector coordination that makes that possible.

STRATEGIC FRAMING

***Donde Plowman**, Chancellor, University of Tennessee, Knoxville*

Chancellor Plowman issued a challenge to the room: **radical collaboration**. Not coordination, not cooperation, a fundamentally different way of partnering across sectors to achieve what no single institution can do alone. She anchored this call in three concrete UT commitments:

1. **AI TECHX** Consortium, connecting faculty expertise to company-specific challenges
2. **COLLEGE OF EMERGING AND COLLABORATIVE STUDIES (CECS)**, Tennessee's first applied AI degree program built with industry advisory committees embedded into its model
3. **MAPLEHURST INNOVATION DISTRICT**, a new corridor designed to co-locate companies, faculty, and students in place-based innovation

The phrase "radical collaboration" became the Summit's defining theme, returning in session after session across both days.

She closed with a powerful remark: "The real challenge is going to be when we leave here. So, what do we commit to? What are we going to take from here that changes the world? And let's start by changing Tennessee."

KEYNOTE ADDRESS: "WINNING THE AI RACE: THE TENNESSEE ADVANTAGE"

***Lynne Parker**, Former Principal Deputy Director, White House Office of Science and Technology Policy (OSTP) and Associate Vice Chancellor Emerita, University of Tennessee, Knoxville and National AI Leader*

Dr. Parker delivered the summit's intellectual anchor. Drawing on her experience across presidential administrations, she reframed the "AI race", arguing that Tennessee is not competing to build the biggest models or the fastest chips, but to win the **adoption race**: the race to use AI well across institutions, sectors, and communities. This distinction matters, because the obstacle to AI success is rarely the technology; it is the absence of intentional organizational change.

Tennessee's competitive advantage, she argued, lies not in any single institution but in the density and alignment of its ecosystem. The convergence of ORNL, Y-12, UT, Vanderbilt, TVA, EPB Quantum, and Kairos Power within one state represents coordinated momentum that cannot be replicated overnight. Trust, built locally, through institutions communities already know, is the foundation. Tennessee's nuclear energy sector is the proven blueprint built not through speed alone, but through community trust, intentional workforce development, and aligned institutions. The same approach, she argued, is precisely the model for AI leadership.

> **"MY VISION IS THAT IN THE YEARS AHEAD, WHEN PEOPLE ACROSS THE COUNTRY ASK, 'HOW DO YOU ACTUALLY DO AI RIGHT?' THE ANSWER WILL BE, 'YOU DO IT THE TENNESSEE WAY.' BY LEADING WITH PEOPLE, TRUST, AND COLLABORATION AT SCALE."**
>
> — Lynne Parker

THE MESSAGE TO EACH SECTOR IN THE ROOM:

- Educators must embed AI as a core capability, not an afterthought;
- industry must invest in people and redesign work with intention;
- government must lead by example;
- and policymakers must create conditions for innovation while protecting public trust.

Her closing vision was both aspirational and grounded: "My vision is that in the years ahead, when people across the country ask, 'How do you actually do AI right?' the answer will be, **'You do it the Tennessee way.' By leading with people, trust, and collaboration at scale**."

FRAMING REMARKS: THE STATE'S AI DIRECTION

***Jim Bryson**, Commissioner of Finance and Administration, State of Tennessee, and Co-Chair, TN AI Advisory Council*

Commissioner Bryson offered one of the Summit's most grounded perspectives: a firsthand account of how Tennessee state government moved from ad hoc AI adoption to structured, enterprise-wide strategy, and why that arc matters as a national model.

By early 2025, **50% of state employees were already using AI tools informally**, creating real data security risks. Rather than defaulting to restriction, Tennessee responded with structured enablement: 1,000 ChatGPT licenses, Microsoft Copilot deployment, an AI Steering Committee, an AI Innovations Lab, and 5,300 voluntary training completions.

The Governor's budget signals the long-term commitment: $38.5 million for AI infrastructure, $43 million for quantum networking, and $75 million for nuclear technology development.

The core message: Tennessee is not reacting to AI. It is governing it.

AI IN TENNESSEE'S INDUSTRY

***Stuart McWhorter**, Deputy Governor and Commissioner, State of Tennessee Department of Economic and Community Development*

Deputy Governor McWhorter made the economic case for **AI readiness** as Tennessee's defining competitive strategy. AI is already delivering measurable impact across the state's core industries: diagnostics and administrative efficiency in healthcare, smarter automation and predictive maintenance in manufacturing, supply chain and mobility optimization in automotive, and route optimization in logistics, where 75% of the U.S. population sits within a day's truck drive.

Energy is the anchor. With 12+ nuclear projects underway, $10 billion in capital investment, and a U.S.-Japan $40 billion SMR commitment, Tennessee's energy sector is both an economic engine and a strategic AI infrastructure asset. Meanwhile, broadband access has improved dramatically, with the share of Tennesseans lacking high-speed internet falling from 20% to under 2% since Governor Lee took office.

His central argument: AI is not one industry. It is the infrastructure of every industry. And the states that win are the states with the workers.

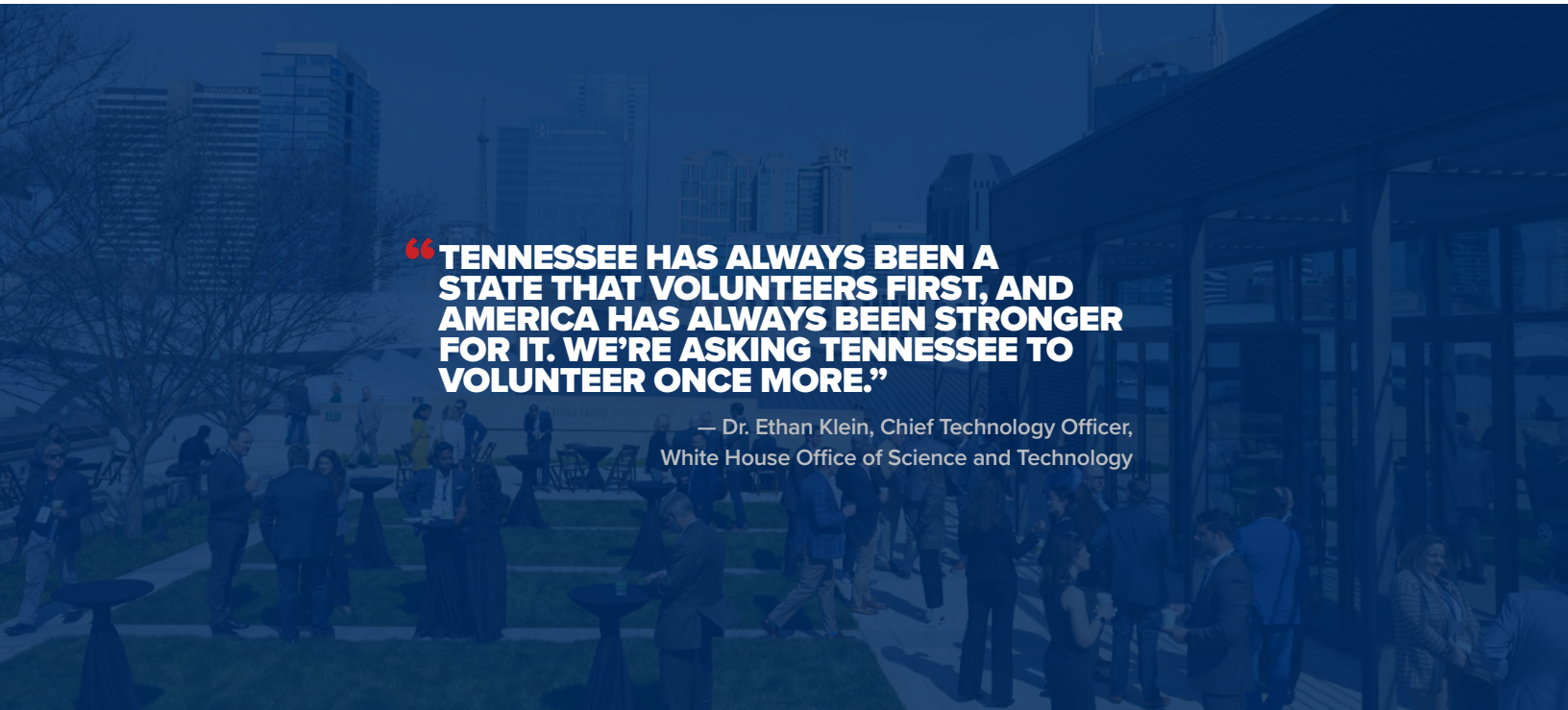
A VIEW FROM THE WHITE HOUSE

***Ethan Klein**, Chief Technology Officer, White House Office of Science and Technology*

Dr. Klein connected the federal AI strategy directly to Tennessee's moment. The AI race will not be decided in Washington — it will be won in states, cities, and universities, by delivering the benefits of this technology for American workers and communities. The White House's strategy rests on three pillars: AI Innovation, AI Infrastructure, and AI International Diplomacy, supported by initiatives including the Genesis Mission and the American AI Export Program.

Tennessee, he emphasized, is not a passive beneficiary of this strategy. The Knoxville/ORNL, Chattanooga/Vanderbilt/EPB, and Nashville corridors were specifically cited as national models for what regional innovation clusters can achieve when institutions align around a common purpose. He also noted that Tennessee has emerged as a national model for statewide collaboration, a distinction that reflects the cross-sector alignment the Summit was designed to strengthen.

He closed with a charge that was tailor-made for the room: "Tennessee has always been a state that volunteers first, and America has always been stronger for it. **We're asking Tennessee to volunteer once more**."



> **"TENNESSEE HAS ALWAYS BEEN A STATE THAT VOLUNTEERS FIRST, AND AMERICA HAS ALWAYS BEEN STRONGER FOR IT. WE'RE ASKING TENNESSEE TO VOLUNTEER ONCE MORE."**
>
> — Dr. Ethan Klein, Chief Technology Officer, White House Office of Science and Technology

PANEL: BUILDING CAPACITY: DATA CENTERS AND ENERGY FOR AI

Panelists: ***Manu Sivaraman*** *(Senior Vice President of New Nuclear and Transmission Projects, Tennessee Valley Authority),* ***Todd Ailes*** *(COO, Consolidated Nuclear Security / Y12),* ***Evann Freeman*** *(Vice President of Government and Community Relations, EPB),* ***Evan Cummings*** *(Senior Director of Business Development, Kairos Power) | Moderator:* ***Kristin Darby*** *(Chief Information Officer, State of Tennessee)*

Energy infrastructure emerged as a theme across the panel. Panelists noted that Tennessee's AI ambitions will depend on maintaining reliable and affordable power while meeting rapidly increasing demand.

AI-related data center load represented 18% of TVA's total load in 2025 and is forecast to double within five years. New data center projects now routinely require 50-400 megawatts of power, creating pressure on transmission systems and development timelines. Panelists emphasized the need for more streamlined planning, permitting, and regulatory processes to keep up with the demand.

Speakers highlighted several developments already underway, including Kairos Power's Hermes reactor project in Oak Ridge and Google's commitment to purchase 450 MW from the future facility. EPB's fiber network in Chattanooga was also cited as an example of strategic infrastructure investment now supporting advanced AI and quantum networking initiatives.

Panelists also identified emerging challenges, including water availability for cooling, cybersecurity risks, and infrastructure resilience. Tennessee's experience supporting mission-critical operations at Y-12 was noted as a model for long-term planning and continuity.

PANEL: RESEARCH, TALENT, AND TRANSLATION: HIGHER ED'S ROLE IN TN'S AI ECONOMY

Panelists: ***Dr. David L. Butler*** *(Vice Provost for Research and Dean of the College of Graduate Studies, Middle Tennessee State University),* ***Philip Oldham*** *(President, Tennessee Tech University),* ***Dr. Robbie Melton*** *(Provost, Tennessee State University),* ***Randy Boyd*** *(President, University of Tennessee System),* ***Nick Hagemeier*** *(Vice Provost for Research and Chief Research Officer, East Tennessee State University), | Moderator:* ***Dr. Jesse Spencer-Smith*** *(Associate Dean for Partnerships and Innovation for the College of Connected Computing, Vanderbilt University)*

Tennessee's higher education institutions are moving with purpose and urgency, even as the state acknowledges it currently ranks below the national average on AI adoption metrics. The assets to lead are already in place; the challenge is acceleration and coordination.

Tennessee Tech launched the state's first undergraduate AI major. Vanderbilt founded a new College of Connected Computing to embed computing as a cross-disciplinary capability. TSU's AI for All Center focuses on practical, everyday AI applications. MTSU's applied AI research team is actively integrating AI across disciplines.

A critical inflection point was acknowledged: AI models have reached "post-doc level" capability, yet many faculty remain unaware of how extensively students are already using these tools. Graduates need domain expertise, management skills, and sound judgment, not just technical credentials alone.

VIDEO MESSAGE: SENATOR MARSHA BLACKBURN

Senator Blackburn outlined her **TRUMP America AI Act** discussion draft, which she is leading in the United States Senate. The legislation reflects a commitment to balancing innovation with accountability — addressing children's online safety, consumer privacy protections, guardrails around data center impacts on utility rates and local workforces, and a framework preserving states' rights to enforce existing laws until federal preemptive legislation is enacted. Her priorities signal that responsible AI governance is not in tension with American competitiveness; it is a prerequisite for sustaining it.

LUNCH PRESENTATION: PRESIDENTIAL AI CHALLENGE

*Presenters: **Dr. Josh Rosenberg** (Haslam Family Professor & Associate Professor of STEM Education, University of Tennessee, Knoxville), **Reid Jackson** (Computer Science Educator & AI Program Lead, L&N STEM Academy), **Dr. Emily Holtz** (Assistant Professor of Elementary Education Theory and Practice in Teacher Education, University of Tennessee, Knoxville)*

The Presidential AI Challenge demonstrated that AI-ready education is not a future aspiration; it is happening in Tennessee classrooms now. University faculty, K-12 educators, and industry partners collaborated statewide to support student and teacher submissions, with the **K-12 AI Tennessee Showcase** giving every team an opportunity to present their work regardless of competition outcome.

Student projects addressed real community problems. At L&N STEM Academy, four students built a disaster communication tool using retrieval-augmented generation and sentiment analysis to help first responders navigate crisis situations in real time. The technical sophistication was described as college and industry-level work happening inside a public high school.

Three consistent needs emerged from this work: dedicated resources and compensation for teachers who take on AI implementation; industry and university partners physically present in schools as the single most important barrier-reducer; and stronger coordination between districts, universities, and industry with more structured ways to work together.

PANEL: WHAT INDUSTRY NEEDS FROM TENNESSEE

Panelists: ***Ines Voellinger*** *(Digital Transformation and AI Innovation Strategist, Volkswagen of America, Inc),* ***Majed Saadi*** *(CTO, Hitachi Vantara Federal),* ***Quincy Byrdsong*** *(VP for Research Operations, Ballad Health),* ***Ken Dircks*** *(AI Solutions Lead for State & Local Government, EY) | Moderator:* ***Nathan Buttrey*** *(Senior Advisor to TNECD Commissioner Stuart McWhorter, Office of Innovation)*

Industry panelists were unified on one point: AI is already delivering measurable value across Tennessee's core sectors, including healthcare, manufacturing, automotive, and professional services. Technology is not the limiting factor – the gap is human.

Successful AI integration demands trust, intentional change management, and a skill set the workforce is only beginning to develop. Panelists described the emerging need for what they called an "**AI integration manager**," someone who can apply sound judgment to AI output before it reaches a real-world decision. That capacity, the ability to serve as a quality gate between AI and operations, is what employers need most and currently find hardest to fill. Industry does not just need workers who understand AI. It needs workers who can use it responsibly from day one.

Tennessee's competitive position is real. Panelists consistently cited geographic centrality, competitive energy costs, no state income tax, proximity to national laboratories, a strong university system, and a culture of cross-sector willingness as genuine differentiators. The strategic imperative that followed was equally clear: focus on a small number of industries, build AI solutions within them, and export that expertise. **Tennessee should be a net exporter of AI innovation, not simply an adopter of it**.

Panelists also addressed equity. Tennessee's AI leadership cannot concentrate in its urban centers. Rural communities, particularly in healthcare, remain largely unaware of AI's potential, and that gap will widen without deliberate outreach. Leading in AI means leading across all 95 counties.

UNIVERSITY PRESIDENTIAL TALK

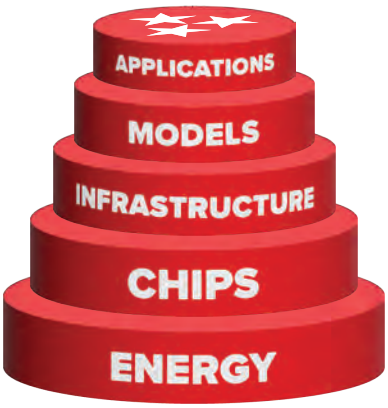
Daniel Diermeier*, Chancellor, Vanderbilt University*

Chancellor Diermeier grounded the Summit's collaborative ambitions in a concrete reminder: transformative AI research is already happening in Tennessee. Vanderbilt alumni and faculty are behind some of the field's most consequential breakthroughs, including the AlphaFold protein-structure model, whose lead researcher is a Vanderbilt alumnus and Nobel Prize recipient.

The three institutional developments he announced each extend that momentum: a place-based innovation hub in Nashville to accelerate AI-driven entrepreneurship, a Quantum Innovation Institute in Chattanooga to build the computing infrastructure AI requires, and new national campuses to grow the talent pipeline that sustains it all.

PANEL: SCALING AI PARTNERSHIPS FOR REGIONAL IMPACT

Panelists: ***Doug Vargo*** *(VP, National AI and Alliance Lead, CGI),* ***Dr. Peter Buckley*** *(Chancellor, University of Tennessee Health Science Center),* ***Jamie Thomas*** *(Chief Client Innovation Officer, IBM),* ***Jack Wells*** *(Director of Higher Education and Research Computing, NVIDIA),* ***Aleta Jeffress*** *(Chief Technology Officer, NTT DATA, State, Local and Education) | Moderator:* ***Brandon Gibson*** *(COO, Office of the Governor of the State of Tennessee)*



A useful framework opened the discussion: **think of AI as a five-layer cake**, from **energy** and **chips** at the foundation, through **infrastructure**, **models**, and finally **applications** at the top. The infrastructure is being built. What Tennessee has not yet decided is which applications it will be best at in the world. That is the strategic choice in front of the state.

The panel's biggest concern was scale. The challenge is not a shortage of technology or even talent in the traditional sense. It is the far harder problem of bringing 3.5 million Tennessee workers to the right level of AI competency for their specific roles. Workers with strong AI skills already earn 56% more than their peers, which means this is not just a workforce issue. It is an equity issue. Panelists were frank: no single company can close that gap on its own. The organizations making the most progress are the ones building sustained partnerships with local universities, treating those relationships as strategic infrastructure rather than one-off engagements.

The most counterintuitive insight was also the most important: giving people tools does not work. What works is habit formation. Workers need a sustained, ongoing relationship with AI in their daily work, not a training session they attend once and forget. The organizations seeing real results are the ones that have built deliberate operating models around AI, invested in understanding their data, and created cultures where collaboration across every function is the expectation rather than the exception. The payoff is real and measurable. A 17% reduction in clinical documentation time at one health system, for example, translated directly into more time for physicians to spend with patients. That is what disciplined, sustained adoption actually looks like in practice.

VIDEO MESSAGE: SENATOR BILL HAGERTY

Senator Hagerty reframed the AI competition with a pointed observation: **the race will be won in kilowatts as much as in code**. For Tennessee, that is a significant advantage. TVA's diverse, stable power mix is a strategic asset in an era when AI's 24/7 baseload demands are straining energy infrastructure nationwide. Advanced nuclear and small modular reactors are uniquely positioned to meet those demands reliably and at scale. He also elevated the national security dimension, China's aggressive AI-oriented energy buildout is not simply an economic competition, it is a strategic one, and framed the DOE's **Genesis Mission** as Tennessee's most direct contribution to winning it.

UNIVERSITY PRESIDENTIAL TALK

***Bill Hardgrave**, President, University of Memphis*

President Hardgrave opened with an overview of the University of Memphis's long history of AI research, beginning in the 1970s and 1980s with Dr. Stan Franklin, Dr. Art Graesser, and the Institute for Intelligent Systems. His remarks then focused on the geographic and economic momentum building in West Tennessee.

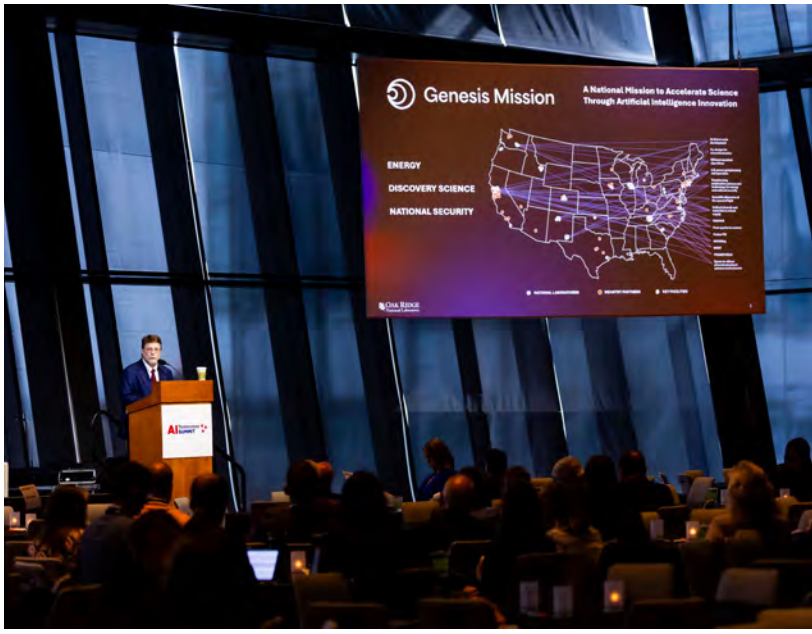
The University of Memphis is responding with urgency. The **"AI for All" initiative**, launched in Fall 2025, allows any student regardless of major to earn a minor in AI, with early enrollment exceeding expectations. The University also launched a Master of Science in Applied AI and a Bachelor of Applied Science and is developing articulation pathways with the Tennessee College of Applied Technology (TCAT) system, Tennessee's 27-campus network of workforce-focused technical colleges, to allow flexible, stackable credentialing that removes the traditional barrier between technical training and university education.

His broader point: Tennessee's universities must not only align with workforce needs. They must actively lead them.

ACCELERATING SCIENCE AND INNOVATION WITH AI

***Stephen Streiffer**, Director, Oak Ridge National Laboratory*

ORNL has been doing AI since before it was a household term — the laboratory's first AI project dates to 1979. What has changed is a convergence of hardware capability, deep neural networks, and transformer architectures that has made AI native to virtually every aspect of the laboratory's work, from materials discovery to energy grid modeling to national security.



The most striking example: quantum chemical calculations now running on quantum computers are delivering results comparable to the Frontier supercomputer at a fraction of the energy and physical footprint. This convergence of exascale computing, advanced AI models, and quantum systems is enabling ORNL to address problems that were previously unsolvable. And in a notable historical footnote: in 2012, ORNL partnered with a small gaming chip company to integrate their processors into high-performance computing. That company was NVIDIA.

Director Streiffer's vision: Tennessee as the national center for convergent computing, where high-performance computing, AI, and quantum are not separate domains but a single, integrated research and innovation platform.

DINNER WITH THE GOVERNOR

On the evening of March 25, approximately 100 leaders from Tennessee's academic, government, and industry sectors gathered for a private dinner capping a full day of AI-focused sessions. The event served as both a capstone to Day 1 of the AI Tennessee Summit and a clear signal of the state's collective ambition: to lead the nation in artificial intelligence.

The dinner's central message came from two directions — state and federal — and landed on the same conclusion.

Governor Bill Lee drew a direct line between Tennessee's proven success in nuclear energy and the path forward in AI. With more than $70 million invested, Oak Ridge established as a global hub, and a Nuclear Advisory Council and Nuclear Energy Fund as replicable models, the Governor made the case that Tennessee already knows how to build consequential industries from the ground up. The approach, rooted in long-term investment, institutional alignment, and community trust, is precisely the blueprint for AI leadership. His call to the room was unambiguous: the states and nations that lead AI will hold a decisive, long-term advantage, both economically and in terms of national security. "If anybody can lead in this, we can."

Dr. Ethan Klein, the fifth U.S. Chief Technology Officer, reinforced that conviction with a federal commitment. Representing the White House's three-pillar AI agenda, innovation, infrastructure, and international diplomacy, Dr. Klein made clear that Tennessee is not a passive beneficiary of federal AI strategy. It is a named partner. He specifically cited Tennessee's cross-sector ecosystem as a national model for statewide collaboration and extended a direct commitment to the room: "I give you my guarantee that I want to be a partner not only today with the summit, but really a continued partnership between the U.S. government and the state of Tennessee."

Taken together, the evening underscored what two days of sessions would reinforce: Tennessee's competitive position in AI is not aspirational. The infrastructure is in place, the institutions are aligned, the federal relationship is active, and the talent is already here. **The work ahead is not to build the ecosystem. It is to mobilize it.**

> **"IF ANYONE CAN LEAD THIS, WE CAN."**
>
> — Bill Lee, Governor, State of Tennessee

DAY 2 — MARCH 26, 2026

WELCOME BACK & FRAMING

Flora Tydings *(Chancellor, Tennessee Board of Regents)*

Chancellor Tydings positioned the Tennessee Board of Regents (TBR) as a primary engine for AI workforce development across Tennessee. TBR consists of 35 colleges, across 175 locations, and a 140,000-student system. Progress is already measurable: an AI Learning Collaborative has identified 40 highest-enrollment courses for AI integration, more than 1,800 faculty have completed system-level AI training, and Southwest Community College in Memphis launched the state's first Associate of Applied Science degree in AI. A Faculty Fellows Initiative is developing AI assessment models and disseminating best practices campus-wide.

TBR also highlighted one of its most distinctive commitments: the system warranties its technical graduates, with over 107,000 warranties issued and zero claims to date — a powerful signal of confidence in the quality of Tennessee's workforce preparation.

REFLECTIONS ON AI WORKFORCE DEVELOPMENT

Deniece Thomas*, Commissioner, State of Tennessee Department of Labor and Workforce Development*

Commissioner Thomas framed AI's workforce impact through a memorable construct she called the "vowels of AI", offering a practical lens for understanding what Tennessee's workforce strategy must address. Organized around five imperatives:

1. **ADOPTION** acknowledges that AI is here to stay and that workforce frameworks must reflect this reality.
2. **ENGAGEMENT** calls for hands-on AI exposure beginning at the youngest age possible.
3. **INTEGRATION** recognizes that mental adaptation is as important as technical skill, as work planning and scheduling will fundamentally change.
4. **OPPORTUNITY** points to Tennessee's national standing: Commissioner Thomas represented the state at a National Governors Association AI roundtable, where Tennessee was cited as a model for other states.
5. **UNDERSTANDING** emphasizes that continued learning is essential, as no one can predict with precision which jobs will be affected or when.

At least 500,000 Tennessee jobs will be touched by AI in the near term, and that labor market data is already showing early signals of AI-related workforce shifts.

PANEL: TEACHING, LEARNING, AND EARNING IN THE AGE OF AI

Panelists: ***Troy Parkes*** *(SVP of Global Business Development, Greater Memphis Chamber),* ***Dr. Sara Heyburn Morrison*** *(Executive Director, Tennessee State Board of Education) | Moderator:* ***David Mansouri*** *(President and CEO, Tennessee SCORE)*

The panel's framing was stark: **170 million new occupations are expected to emerge globally by 2030 due to AI**, and workers with strong AI skills make 56% more than peers.

Tennessee enters this moment with momentum. The state has climbed from 42nd to 17th in K-12 educational outcomes over 15 years. Panelists suggested that AI could accelerate the move into the top 5 to 10 states. SCORE's approach offers a useful model: start with what works, including great teaching, strong curriculum, tutoring, and advising, then ask how AI can accelerate those priorities rather than replace them. Sumner County's use of the AI tool, Coursemojo, built on integrating high-quality instructional materials, is already showing measurable gains in middle school English language arts and closing gaps for students with disabilities and economically disadvantaged students..

Applied examples extended beyond the classroom. AI is being deployed for high school master scheduling, career advising, and reducing teacher administrative burden. The Memphis/xAI partnership modeled speed and intentionality: xAI's first 100,000 GPUs came online in Memphis in 122 days, a timeline that would typically require three to four years.

THE PANEL'S THROUGHLINE: THE ABILITY TO WORK EFFECTIVELY WITH AI IS WORKFORCE DEVELOPMENT, AND EDUCATION HAS A RESPONSIBILITY TO RESPOND TO PREPARE STUDENTS FOR A RAPIDLY CHANGING ECONOMY.

PANEL: FROM EDUCATION TO UPSKILLING: TN'S AI TALENT PIPELINE

Panelists: ***Dr. Scott Langford*** *(Superintendent, Sumner County Schools),* ***Meka Egwuekwe*** *(CEO, CodeCrew),* ***Dr. Chris Whaley*** *(President, Roane State Community College) | Moderator:* ***Dr. Michael Torrence*** *(President, Motlow State Community College)*

The sobering benchmark: China's Ministry of Education is mandating AI basics by 3rd grade, data and coding by 4th grade, and intelligent agent development by 5th grade. Tennessee's response must be equally intentional.

Equity was central throughout. Memphis-based nonprofit CodeCrew has served 16,000 students across 57 schools, empowering youth and adults from underrepresented communities through hands-on computer science and coding education. The results speak for themselves: adult graduates move from an average income of $12,000 to $65,000 per year in starting salaries; a direct demonstration of what AI-aligned education can do for economic mobility. CodeCrew also helped advocate for computer science as a high school graduation requirement in Tennessee, a significant policy milestone. Roane State's work to reach students in Winfield, Jellico, and Sunbright was framed not as an operational challenge but as a personal one.

The panel defined AI competency broadly: civic competency, economic competency, and human judgment — knowing when and when not to use AI. The greatest risk is moving too slowly for rural and underserved communities, who will be disproportionately left behind if adoption remains concentrated in urban centers. Panelists acknowledged the importance of proactive legislative engagement to ensure well-intentioned policies do not inadvertently restrict the AI-supported instruction Tennessee is working to scale. Legislation and education goals must be developed in coordination, not in isolation.

VIDEO MESSAGE: CONGRESSMAN CHUCK FLEISCHMANN

Congressman Fleischmann highlighted his FY2026 Energy and Water Bill as delivering historic levels of funding for new nuclear energy, with robust appropriations for the DOE's Office of Science and Oak Ridge National Laboratory. He framed these not merely as economic priorities, but as national security imperatives. Central to his remarks was the **Genesis Mission**, which he positioned as Tennessee's most direct answer to China's aggressive AI infrastructure buildout and its growing lead in critical scientific publications.

PANEL: VOLUNTEER VALUE: WHY AI STARTUPS ARE CHOOSING TENNESSEE

Panelists: ***John Derrick*** *(Founder and CEO, Authentrics.AI), Cal Westenberg (CEO Mobius.ai),* ***Wesley Montague*** *(CEO, Ship It Pro),* ***Jian Huang*** *(Founder, VisualizAI) | Moderator:* ***Lindsey Cox*** *(CEO, LaunchTN)*

Tennessee's startup environment offers genuine advantages: ease of doing business, competitive electricity costs, no state income tax, proximity to world-class universities and national laboratories, and a growing innovation culture. The capital ecosystem, however, remains a work in progress. Founders are still traveling to Florida, Georgia, and Silicon Valley for investment, and closing that gap is essential to keeping Tennessee-born companies in Tennessee.

Tennessee's ability to turn research into revenue is no longer aspirational – it is already happening. The UTRF Accelerate Fund's early investment in Visualize AI proved that the right institutional support at the right moment can be the catalyst that moves an idea from lab to market. Companies like Ship It Pro and Authentrics.AI are the result: Tennessee-born, export-ready AI companies competing and winning beyond state lines. This is precisely the ecosystem AI TechX's "From Lab to Market: Accelerating AI Innovation" event was designed to accelerate, connecting founders, researchers, industry, and investors around a shared conviction that startup support is not a peripheral priority. It is the engine of Tennessee's long-term economic competitiveness.

PANELISTS AGREED: THE MOST VALUABLE FORM OF CAPITAL REMAINS REVENUE, AND CORPORATE PILOT PARTNERSHIPS ARE THE MOST CRITICAL RESOURCE FOR EARLY-STAGE COMPANIES.

LUNCH REMARKS: SENATOR BO WATSON

Speaking as both a state legislator and a practicing physical therapist at HCA, Senator Watson offered a uniquely grounded perspective on AI's real-world impact across government and healthcare.

In government, the opportunity is significant: AI-powered tools are already improving permitting, fraud detection, and public safety. Tennessee holds the largest educational database in the country, collected since the 1990s, but currently lacks the analytical capacity to use it effectively. That gap represents both a challenge and an extraordinary, untapped asset.

In healthcare, the examples were striking. Ambient documentation tools are listening to physician-patient conversations and generating notes and differential diagnoses in real time. An AI system identified a peripheral breast cancer abnormality on an X-ray that human radiologists missed, three years before diagnosis. Senator Watson's assessment: "This is the worst it will ever be."

SENATOR WATSON BALANCED ENTHUSIASM WITH CLEAR-EYED CAUTION: DATA PRIVACY, CYBERSECURITY, AI HALLUCINATION, ACCOUNTABILITY, AND ENERGY AND WATER DEMANDS ARE REAL CONCERNS. HUMAN OVERSIGHT IS NOT OPTIONAL.

PANEL: MEETING TODAY'S AI NEEDS: FROM STRATEGY TO ACTION IN 2026

Panelists: ***Josh Brown*** *(President and CEO, Tennessee Chamber of Commerce & Industry),* ***Matthew Kittrell*** *(Member of the Board of Directors, Knoxville Technology Council and Director, CGI),* ***Keri Cagle*** *(SVP, ORAU and Director, ORISE),* ***Whitney Staub-Juergens*** *(Vice President and Chief Operating Officer, HCA Healthcare) | Moderator:* ***Dr. Ozlem Kilic*** *(Vice Provost and Founding Dean, University of Tennessee, Knoxville College of Emerging and Collaborative Studies)*

The panel's central argument: the ability to work effectively with AI is going to be the next driver of income inequality — practical, applied competency. **With 3.5 million Tennessee workers needing to be upskilled** at the right level for their roles, the scale of the challenge demands urgency and coordination.

HCA Healthcare provided one of the Summit's most concrete enterprise-level examples. Four years into its AI strategy, HCA has scaled to 40 use cases across 10 domains, including AI interpretation of fetal heart rate strips and AI-constructed nurse handoff reports. HCA currently has 40 open AI-related roles posted and has hired 280+ people in 18 months, further demonstrating that the demand for skilled workers is immediate and growing.

Practical models for replication emerged: a Clarksville manufacturer partnering with a local TCAT campus to create certificate programs with $75,000 starting salaries; ORAU/ORISE placing thousands of research participants at national labs annually; and the Tennessee Chamber partnering with UTCIS on AI and manufacturing training for member companies.

THE CONSENSUS: TENNESSEE DOES NOT NEED MORE ORGANIZATIONS. IT NEEDS BETTER COORDINATION MECHANISMS BETWEEN THE ONES IT ALREADY HAS.

PANEL: TENNESSEE AT THE FRONTIER OF AUTONOMOUS DISCOVERY: AI LABS & THE GENESIS MISSION

Panelists: ***Sreenivas Rangan Sukumar*** *(Senior Director, AI for Science and Innovation, AMD),* ***Sergei Kalinin*** *(Weston Fulton Professor, University of Tennessee, Knoxville),* ***Robbie Robinson*** *(Chief AI Officer, Y-12),* ***Ben Mintz*** *(Technical Lead, Autonomous Lab of the Future; Director, INTERSECT Initiative at Oak Ridge National Laboratory) | Moderator:* ***Dr. Deborah Crawford*** *(Vice Chancellor for Research, Innovation, & Economic Development, University of Tennessee, Knoxville)*

This panel focused on the research infrastructure and scientific capabilities already in place across Tennessee.

Panelists highlighted the **Genesis Mission**, which connects DOE's 17 national laboratories with NSF, NIH, USDA, and other federal agencies to accelerate scientific discovery. Examples discussed included reducing drug discovery timelines from approximately 12 years to 6 years. At Y-12, AI, autonomous discovery, and quantum computing are being explored as tools to help meet a goal of increasing production efficiency by 20%. Panelists emphasized that industry engagement will be critical to translating research advances into real-world applications. ORNL's recent membership in AI TechX was cited as one mechanism for strengthening those connections.

Speakers also discussed the growing role of AI in research. ORNL's Frontier supercomputer is now heavily focused on AI workloads, while its autonomous chemistry lab operates continuously using robotic synthesis. UT was an early leader in this space, establishing one of the first automated laboratories in U.S. academia in 2019 and later deploying a fully autonomous instrument.

Quantum computing was another area of focus. With activity concentrated across Knoxville, Oak Ridge, Chattanooga, and Nashville, panelists argued that Tennessee's quantum ecosystem is not a standalone asset. It is increasingly the infrastructure that makes Tennessee's most advanced AI research possible.

> **"THIS IS THE BIGGEST DISRUPTION FACTOR IN THE WAY THAT WE DID SCIENCE OVER THE LAST 30 YEARS.**
>
> — Sergei Kalinin, Weston Fulton Professor, University of Tennessee, Knoxville

VIDEO MESSAGE: CONGRESSMAN MATT VAN EPPS

Congressman Van Epps, having previously led AI work as Commissioner of General Services, brought direct experience to the policy conversation. His message: AI has crossed a threshold and must now be treated as core national infrastructure, as critical as energy and transportation. The regulatory approach must be principles-based and outcomes-focused, avoiding frameworks that slow adoption without meaningfully reducing risk. He pointed to three federal investment priorities: supporting the research-to-deployment pipeline, funding workforce upskilling at scale, and expanding public-private partnerships.

Tennessee's cross-sector ecosystem is not just a regional achievement. It is a model for the nation.

CLOSING & NEXT STEPS

Roger Waynick *(Director of Artificial Intelligence, State of Tennessee)*

His message was clear: over two days, the room had not simply discussed the future of AI. It had witnessed the future being actively built