



Industrial AI Summit Executive Summary 2025

Foreword

On September 4, 2025, the Industrial AI Summit was held at Schloss Donaueschingen, Germany as a one-day, invitation-only event. It brought together **50 selected senior executives and visionary leaders** from across Europe to explore the transformative potential of AI for the manufacturing industry, in R&D, production, and supply chain management.

Co-hosted by industrial AI scale-ups **EthonAI, SPREAD, and Pelico**, fellow members of the prestigious EU AI Champions Initiative, chaired by French President Emmanuel Macron and leading investor **General Catalyst**, this exclusive executive event offered a rare opportunity to exchange perspectives within an **elite, curated community of policymakers, academics, and technologists** shaping Europe’s industrial AI future.

“For startups, trust is everything. Events like INAI give us the stage to prove that scale-ups can play alongside the biggest players, building partnerships that accelerate impact across the ecosystem.”

Robert Göbel

Co-Founder & MD, SPREAD



Main takeaways from INAI Summit

1 97% of GenAI pilots fail to deliver ROI:

Despite heavy investment, most organizations see no measurable returns from GenAI. The few that succeed show that business impact depends on workflow integration, not isolated showcases

2 Data-driven engineering is Europe's edge in mastering software-defined products

Volkswagen and **SPREAD** demonstrated how data-driven engineering can 'shift left' in R&D to prevent late-stage failures that drive cost and delay in software-defined vehicles. By accelerating root-cause diagnosis, compressing validation cycles, and cutting time lost in fragmented systems, the collaboration showed how European OEMs can compete on both speed and quality. The broader lesson: data integration, not model quality, is the decisive factor in making industrial AI scale.

3 Europe risks being locked in "pilot purgatory":

More than half of manufacturers have not considered AI adoption (ETH Zürich survey). Without scaling now, Europe risks falling behind faster-moving regions

4 Lighthouse factories prove AI delivers.

The WEF Global Lighthouse Network shows measurable results:

- 69% increase in labor productivity and 42% less energy use (Siemens Erlangen)
- Reduce time-to-market by 67% (AstraZeneca Södertälje)
- Lower emissions by 31% (Roche Basel)

5 Scaling requires discipline, not hype:

Industry leaders agreed on a 4-step playbook:

- Start with real business problems.
- Demonstrate impact bottom-up.
- Replicate success factory-to-factory.
- Secure executive sponsorship for rollout

6 Horizontal transformation is the real disruption:

Most adoption today is siloed. True gains come when AI is deployed across the value chain, cutting lead times, improving OEE, reducing energy, and managing supply chain risk

7 Europe's edge lies in trust, openness, and talent:

Regulation and explainability give Europe credibility, but leadership depends on massive investment in digital skills, open standards, and capital to scale industrial AI champions.

Voices from
industry leaders

“Ecosystem openness and explainability are essential for trust. Without trust, adoption will stall.”

Jeffrey Hojlo

Research Vice President, Industrial Ecosystems &
Manufacturing Insights at IDC



“Trust is Europe’s advantage. We cannot afford a ‘move fast, break things’ approach.”

Jonathan Barry

Director of Policy at Mila



“Europe is waking up to AI’s potential in industry, with global players dedicating teams and policymakers shaping the landscape. The challenge is balancing innovation with regulation to stay globally competitive while ensuring responsible adoption.”

Vendeline von Bredow

Senior Germany Correspondent at The Economist



“Too many projects chase hype. Match use case with business case or risk stagnation.”

Dr. Netland

Chair of POM at ETH Zürich



“AI is a business topic. To scale, we need horizontal integration, not siloed efforts.”

Dr. Hagen Radowski

Managing Director ar drp



Looking ahead

INAI closed on three clear imperatives:

- Scale with discipline: The playbook is proven, start with real problems, demonstrate measurable impact, replicate at scale, and secure leadership commitment.
- Leverage Europe's advantage: Trust, openness, and industrial expertise are not just heritage, they can be the foundation of global leadership, if scaled now.
- Close the ROI gap: 97% of GenAI pilots still fail to show returns, Europe cannot afford another decade of experiments without impact.

“Europe doesn’t lack technology or ambition, it lacks speed. The winners of the next decade will be those who scale fast, across borders and industries, while staying true to Europe’s values of trust and responsibility.”

Philipp Noll

Co-Founder & MD, SPREAD





Reach out to the experts shaping Europe's industrial AI future

If you'd like a personal executive briefing of the key discussions and takeaways from the Industrial AI Summit 2025, please reach out to our leadership team.

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This is your opportunity to exchange perspectives directly the experts and thought leaders shaping Europe's industrial AI future.