

OPTIMISTIC OUTLOOK PODCAST | EPISODE TRANSCRIPT

“Full Speed Ahead: How High-Speed Rail and AI Are Transforming America's Infrastructure”

Featuring:

Ann Fairchild, Siemens USA Interim CEO and
Tobias “Tobi” Bauer, CEO of Siemens Mobility North America

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Description: America’s rail network is at a pivotal moment, and the future is moving fast.

In this episode of The Optimistic Outlook, Siemens USA Interim CEO Ann Fairchild sits down with Tobias “Tobi” Bauer, CEO of Siemens Mobility North America, to explore what’s driving renewed momentum across passenger and freight rail in the United States. From modernizing legacy infrastructure to building state-of-the-art trains right here at home, Tobi shares why the outlook for rail has never been more positive.

The conversation dives into Siemens’ growing manufacturing footprint on both coasts, the role of industrial AI in improving safety, efficiency, and the passenger experience, and how long-term partnerships are shaping the transportation systems our cities will rely on for decades to come. Tobi also reflects on workforce development, career pathways in manufacturing and engineering, and why reindustrialization is critical to America’s future.

Looking ahead, Ann and Tobi discuss urbanization, high-speed rail, and what it will take to deliver reliable, comfortable, and sustainable mobility solutions that truly improve quality of life. The episode wraps with an optimistic vision for passenger rail in America, one built on trust, innovation, and delivering on promises.

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The future of rail is being built now, and it’s bringing people, cities, and opportunity closer together.

CONVERSATION:

Tobias Bauer

This will be the most innovative, most modern high-speed train in the world right here in the United States. This is a complete upgrade of how people will experience travel.

Lauren Espin

America’s infrastructure is entering a new era as companies invest billions to build out AI data centers and reinvent the power grid. As this transformation unfolds, perhaps you’re wondering about one of America’s first large-scale technology systems. It was a cornerstone of the Industrial Revolution. We’re talking about trains and passenger rail.

We know America is famous for its car culture and interstate highway system, but in recent decades, trains have quietly made a comeback, with Amtrak regularly recording new ridership records. But here is the big question: Is America ready to build out high-speed rail? Are we moving closer to comfortable, safe, 220-mile-per-hour service?

In this episode of the Optimistic Outlook, Siemens USA Interim CEO Ann Fairchild is joined by Tobias Bauer, CEO of Siemens Mobility North America. Together, Ann and Tobias explore how technologies are transforming rail systems—from how they’re being manufactured in America to how they’re moving people reliably nationwide. Join us as we look ahead to the technologies shaping the future of infrastructure and mobility in 2026 and beyond.

Ann Fairchild

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Tobi, there’s a big focus right now on modernizing America’s infrastructure. For example, we’re hearing a lot about the need to reinvent the power grid to support data centers for AI. I know there’s also a lot of excitement in the United States about high-speed rail, and you share that excitement. What is the state of passenger rail in America, and what trends do you think will define 2026?

Tobias Bauer

Look, there has been talk for decades about bringing true high-speed rail to the United States. We applaud our partner Brightline West for actually doing it, and we’ve been working with them to build and bring a high-speed rail connection from Las Vegas to Los Angeles. We started building the trains. They will be built right here in America, and this will be the most innovative, most modern high-speed train in the world right here in the United States.

And I’m convinced once the American public feels it—rides the train, sees the comfort, doesn’t stand in traffic jams—they will be excited, and they will see the true value. And then many further projects will follow.

In addition, we need to upgrade. And I see that, for example, with Amtrak. If we upgrade the general trains, the experience also there for intercity travel, for longer-distance travel—that again will convince people to take the train. And that will again bring more investment, more projects. And then, you know, we have all the ingredients to roll this out broader here in the United States with the competency of engineering and, of course, of our manufacturing workforce. We’re building right here in the United States.

Ann Fairchild

Let’s help our listeners get a sense of what you’re hearing from rail industry leaders across America.

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Tobias Bauer

We feel and we hear excitement. The United States was founded on rail, and there's a lot of infrastructure, whether we talk about freight rail or passenger rail. We are present in 35 cities with our light rail vehicles, with our locomotives, coaches, and, of course, with the infrastructure. Of course, there's an infrastructure which needs to be modernized in order to give the efficiency to the railroads, to the owner operators, and, of course, also to upgrade the passenger experience. So, we see a positive outlook, a very positive outlook. For example, we launched the battery-powered locomotives with Metro North in New York. We're working with a Class One on upgrading their dispatch system. We're strong in the CBTC [communications based train control] environment. All these areas are proof points our investment is needed and the impact is there. For example, Amtrak is upgrading their fleet, and we're proudly building the new Airo fleet right here in Sacramento and in Lexington, North Carolina.

Ann Fairchild

And let's talk specifically about North Carolina and New York. We've invested in new state-of-the-art facilities there, making our rail production truly bicoastal. And I think this speaks volumes about the growth of passenger rail in the United States. Help us understand the state of manufacturing trains in America and the impact of industrial technologies.

Tobias Bauer

One hundred percent, Ann. We're an American company. We are proud that we have all the innovation, the technology, the competency to design and build our trains—and also the signaling, electrification, whatever is needed—right here. Specifically talking about rolling stock, we've grown so much over the past decades, so we decided to expand to the East Coast. Why are we there? We want proximity to our customers. And, of course, I already mentioned there's a workforce—where can we find the right people? Our goal

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is to fully support the reindustrialization of the United States. We give careers to our people in manufacturing, bringing people into manufacturing, training them, and then giving further career opportunities in industrial engineering.

Ann Fairchild

And across Siemens we’ve been hyper-focused on industrial AI. It would be interesting, I think, for our listeners to zoom in for a moment and talk about what that actually means for trains. How is industrial AI impacting the way we build trains and think about the entire passenger experience? How is it helping us address customer needs and challenges?

Tobias Bauer

I feel very privileged being here at the center of AI innovation—the world’s center—right here in the United States. So it’s imperative to embrace the technology. So I would distinguish—first let me say that we are in the safety industry, meaning that our primary goal is to ensure that our solutions transport people and goods safely. Meaning that, you know, we will follow everything needed to ensure that our products are safe.

Number one. So that doesn’t limit the application of AI, but I just want to clarify that we’re not just relying now on AI agents to design our solutions, right? We’re embracing it, but we’re assuring the quality and, most importantly, the safety—number one.

Number two is there is AI innovation that will help to make our products better. We’re using AI to understand: How are our fleets performing? How can they be improved? That’s incredible. And there we will see a lot more to create value for owner-operators, for our customers.

Then there’s the other side. What I’m really excited about—and we can see that already—is there’s still a lot of manual work in our engineering and our design. And

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there AI can be a tremendous help, right? Also to help us streamline our processes. I want to be able to talk to my factory: Where are my parts? Where can we optimize? Because in the end, that will ensure that we can fulfill our customer promises. To me, a contract is a promise—because our customers, they plan on getting their trains on time, they plan on getting their systems up on time. And we have to do everything we can to deliver in quality, in time. And so AI will be a tremendous help enhancing our processes, streamlining our processes, and meeting our targets.

Ann Fairchild

So, Tobi, it’s customary to end each episode of the Optimistic Outlook on an optimistic note. What is your optimistic outlook for passenger rail in America?

Tobias Bauer

People want to travel, and they appreciate the comfort, the safety, the comfort of rail—whether it’s in cities, whether it’s between cities. This is a complete upgrade of how people will experience travel.

Ann Fairchild

Fantastic. Thank you for joining me today. Thank you, Tobi.

Tobias Bauer

Thanks, Ann. Thanks for having me.

Lauren Espin

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Thank you for joining us on this episode of the Optimistic Outlook. Be sure to tune in for more conversations with leaders shaping technology for a better tomorrow. Please subscribe to The Optimistic Outlook wherever you listen to your podcasts, and be sure to share the podcast with a friend or colleague.

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