

Texas Brain Economy Summit

Executive Insights Report

Key Themes · Strategic Implications · Opportunities for Leaders

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A LETTER FROM THE AUTHOR

From Insight to Action

The Texas Brain Economy Summit was more than a convening — it was a signal. Across two days in Houston, leaders from healthcare, academia, industry, government, and venture capital converged on a single, urgent conviction: **brain capital is the next great economic and human imperative of our time.**

This Executive Insights Report was created to extend that signal beyond the summit hall. It is not a transcript and it is not a recap. It is a synthesis — a strategic distillation designed for the executives, boards, policymakers, and investors who hold the levers to translate brain science into measurable economic, organizational, and human outcomes.

Use this report three ways. **First**, as a briefing — a single, credible document you can hand to a CEO, CHRO, university president, hospital system leader, or cabinet official to bring them current on the brain economy in under thirty minutes. **Second**, as a strategy primer — every section concludes with implications, questions for leaders, and organizational applications you can take directly into a leadership meeting. **Third**, as a partnership invitation — the brain economy will not be built by any one institution. It will be built at the intersection of all of them.

My deepest appreciation goes to the summit organizers, presenters, and participants whose generosity of insight made this work possible — and to the team at Slalom, whose commitment to fiercely human, technology-enabled change makes us a fitting partner to advance this conversation. The work ahead is significant. So is the opportunity.

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Houston, Texas · 2026

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SECTION 01 · EXECUTIVE SUMMARY

The Six Signals Leaders Should Take Away

The Texas Brain Economy Summit surfaced a single, durable argument: **the next decade of competitive advantage — for companies, cities, and nations — will be decided by how seriously they invest in the human brain.** Six strategic takeaways frame the report that follows.

01**Brain capital is society's most valuable asset.**

Mental health, neurological health, creativity, learning capacity, and emotional resilience are not soft benefits — they are the inputs to every knowledge-economy output.

02**Mental health is economic infrastructure.**

Mental illness drives lost productivity, disability claims, withdrawal from the workforce, and healthcare cost growth. It is a board-level economic risk, not an HR program.

03**Houston is positioned to lead globally.**

Texas Medical Center, a young and diverse workforce, deep life-sciences capacity, and an aligned civic agenda make Houston a credible global hub for the brain economy.

04**AI is the accelerant for precision neuroscience.**

AI fuses imaging, multi-omics, digital phenotypes, and lived experience into precision subtypes — collapsing decades of diagnostic ambiguity into actionable interventions.

05**Partnership is the only path forward.**

No single sector can deliver the brain economy. Healthcare, employers, academia, technology, capital, and policy must operate as one connected system.

06**Workplaces are the new clinical setting.**

Employers reach more adults more consistently than any clinical system. The workplace is now the most scalable surface for brain health intervention.

EXECUTIVE INSIGHT**The brain is the next balance sheet.**

The organizations that treat cognitive capital with the same rigor they apply to financial capital — measuring it, protecting it, growing it — will outperform those that don't. Brain capital is becoming a reported asset, not an inferred one.

SECTION 02 · THE BRAIN ECONOMY OVERVIEW

Why Now, Why It Matters

The **brain economy** is the systematic recognition that human cognitive, emotional, and neurological capacities are the primary engine of value creation in knowledge-intensive economies. Where the industrial economy was powered by labor and the information economy was powered by data, the brain economy is powered by *cognition itself* — and the conditions that protect and expand it.

Brain Capital = Health + Skills + Enablers

Throughout the summit, leaders converged on a three-part definition of brain capital that expands the traditional human capital model. It is operational, measurable, and actionable at organizational, regional, and national scales.

BRAIN HEALTH	BRAIN SKILLS	BRAIN ENABLERS
Neurological health Mental health Cognitive well-being Resilience & recovery	Education & learning Creativity & innovation Engagement & focus Adaptability	Medical capacity Educational capacity Workplace & environment Arts, culture & community
Protect the asset.	Grow the asset.	Enable the asset.

Why Now

Four converging forces have made the brain economy unavoidable for executive leaders.

Demographic pressure. Aging populations, rising prevalence of dementia and neurodegenerative disease, and a generation of workers facing unprecedented chronic stress are reshaping demand on every health, employer, and public system.

Cognitive load at work. Knowledge workers operate in environments engineered for distraction. Attention fragmentation and burnout are now measurable drags on productivity, retention, and innovation throughput.

AI inflection. Foundation models have moved from novelty to infrastructure. They will either extend human cognition or erode it — the difference is determined by deliberate workflow and capability design.

Capital readiness. Brain-economy investment is shifting from philanthropic to commercial. Venture, corporate, and sovereign capital are actively seeking deployable returns in neuroscience, mental health, and cognitive technology.

WHY IT MATTERS

Brain capital is showing up in the P&L; — visible or not.

Cognitive load, burnout, and untreated mental illness already affect revenue, retention, error rates, and decision quality. The choice is not whether to carry the cost, but whether to manage it intentionally.

SECTION 03 · MAJOR THEMES

Seven Cross-Cutting Signals

Seven themes recurred across nearly every session — independent of speaker, sector, or panel format. Together they form the strategic spine of the brain economy and the lens through which the remainder of this report is structured.

01

Cognition is the new productivity frontier.

Output per hour is plateauing in knowledge work. The next productivity gain comes from protecting attention, recovery, and decision quality — not from adding more hours or tools.

02

Mental health is a leadership system, not a benefit.

Employers that treat mental health as a benefits-line item underperform those that treat it as a leadership operating system embedded in management practice, design, and culture.

03

AI is a cognitive prosthetic — for better or worse.

AI can extend judgment, expertise, and creative range. Deployed without intention, it accelerates cognitive depreciation. The architecture of deployment matters more than the model.

04

Workplace design is brain infrastructure.

Architecture, acoustics, light, and rhythm of the day are now legitimate inputs to cognitive performance. The built environment is a measurable lever, not a perk.

05

Precision neuroscience is arriving fast.

Multi-omics, imaging, digital phenotyping, and AI integration are collapsing brain disease into addressable subtypes. The diagnostic and therapeutic horizon has moved closer.

06

Early life shapes lifetime brain capital.

Investments in the first thousand days deliver the highest multiplier in the entire brain-economy stack — economically, socially, and clinically.

07

Houston has the conditions to lead.

TMC, energy and industrial scale, demographic vitality, and aligned civic leadership form a uniquely complete platform — but only if the region acts with coordinated urgency.

SECTION 04 · SESSION HIGHLIGHTS

Synthesis of Summit Panels

The synthesis that follows distills each principal session into a consistent executive format: *Overview · Key Insights · Strategic Implications · Questions for Leaders · Organizational Applications · Key Takeaway*. These pages are designed to be excerpted, shared, and acted on individually.

SESSION · OPENING KEYNOTE

The Brain Economy Imperative

SPEAKERS & MODERATORS

Steve Kean, President & CEO, Texas Medical Center · David Gow, President & CEO, Gow Media

Overview

The opening framed why brain capital is no longer an academic concept. Demographic pressure, rising prevalence of brain-related disease, and economic dependence on knowledge work have converged. Houston — with TMC and the largest medical complex in the world — is positioned to lead a coordinated, global response.

Key Insights

- Brain capital ties mental, neurological, and cognitive health to economic output.
- Texas Medical Center is positioning as a global anchor for brain-economy R&D.;
- Houston's diversity and workforce vitality are competitive advantages.
- Cross-sector coordination is the differentiating capability.

Strategic Implications

- Position brain health within enterprise strategy, not benefits.
- Engage with regional ecosystems where brain-economy capacity is being built.
- Prepare boards to evaluate brain-capital investments as economic, not philanthropic.
- Treat civic partnership as a talent and reputation asset.

Questions for Leaders

- Q. Is brain capital represented in our enterprise risk register?
- Q. Where in our footprint are we adjacent to a brain-economy ecosystem we could anchor?
- Q. How is our board hearing about cognitive risk and opportunity today?

Potential Organizational Applications

- Add a brain-capital read-out to the annual enterprise risk review.
- Establish a cross-functional brain-economy working group sponsored at C-suite level.
- Identify two regional partnerships (academic + clinical) to formalize in the next 12 months.

KEY TAKEAWAY

Brain capital is now a CEO conversation.

Leaders who frame brain health as economic infrastructure — not benefits spend — will set the pace for the next decade.

SESSION · PANEL 1

Early Brain Development — The Highest-Multiplier Investment

SPEAKERS & MODERATORS

Moderator: Jennifer Bickel, MD · Panelists: Holly Baines, Quianta Moore, Cristine Legare, Sally Waterfield

Overview

The first thousand days of life shape lifetime brain capacity more than any other single input. The panel made the economic, social, and policy case for treating early childhood as the cornerstone of any serious brain-economy strategy — and showed how scalable, evidence-based interventions already exist.

Key Insights

- Caregiver mental health is the single highest leverage point for child development.
- Early language and cognitive environment determine downstream educational outcomes.
- Pediatric and obstetric systems are the natural delivery channels.
- The economic return on early-childhood investment exceeds nearly every other public investment class.

Strategic Implications

- Employers gain workforce resilience by supporting parent and caregiver mental health.
- Healthcare systems can integrate brain-development screening into routine care.
- Educators and policymakers should align early-learning curricula to brain-science evidence.
- Investors can underwrite scalable models in pediatric and family mental health.

Questions for Leaders

- Q. Do our parental-leave and caregiver-support programs reflect brain-science evidence?
- Q. Where are we measuring downstream outcomes of family-health investments?
- Q. How might we partner with pediatric systems in markets where we operate?

Potential Organizational Applications

- Expand caregiver mental-health benefits and measure utilization and outcomes.
- Sponsor regional early-childhood brain-health initiatives with measurable ROI.
- Build family-care pathways into employee health programs.

KEY TAKEAWAY

Invest at the start of life to compound the entire system.

Every dollar deployed in the first thousand days returns multiples across health, education, workforce, and public-safety outcomes.

SESSION · PANEL 2

Brain Health in the Workplace

SPEAKERS & MODERATORS

Moderator: Krystal Sexton, PhD · **Panelists:** Natalie Richardson (Slalom · HabLab), Orlando Alvarez (bp America), Nicki Hellem (Perkins & Will), Jason Schroer (HKS)

Overview

The workplace is now the single largest, most scalable intervention surface for brain health. The panel — including Slalom's Natalie Richardson — connected behavioral science, physical environment, technology design, and leadership practice into a coherent operating model for fiercely human, brain-healthy teams.

Key Insights

- Cognitive load is an enterprise-level risk, not an HR concern.
- Workplace design (lighting, acoustics, rhythm) is a measurable brain-health lever.
- AI augments judgment when designed for it — and atrophies it when not.
- HabLab demonstrates how behavioral science makes brain capital measurable at the team level.

Strategic Implications

- Reframe burnout as a strategic risk with board reporting.
- Treat the built and digital environment as cognitive infrastructure.
- Design AI rollouts to extend, not replace, human judgment.
- Operationalize behavioral science in how teams form, focus, and recover.

Questions for Leaders

- Q. What does our current cognitive-load profile look like across business units?
- Q. Are our workplace investments measured for cognitive performance, not just real-estate efficiency?
- Q. Where is AI deployment reinforcing — or eroding — expert judgment?

Potential Organizational Applications

- Stand up a cognitive-load and recovery metric inside engagement reporting.
- Pilot a HabLab-style intervention with one high-stakes team.
- Embed brain-health principles into the next workplace and AI investment cycles.

KEY TAKEAWAY

The workplace is the new clinic.

Employers who design for cognition will outperform on retention, innovation, and decision quality.

SESSION · PANEL 3

Healthy Aging — Extending the Cognitive Lifespan

SPEAKERS & MODERATORS

Moderator: Alan Landay, PhD · Panelists: Mitchell Elkind, MD · Jim Ray, PhD · Joanne Pike, DrPH (Alzheimer's Association) · Andrew Nevin, PhD

Overview

The panel synthesized the science, policy, and economics of cognitive aging. The headline: we have moved from a reactive treatment posture to a precision-prevention posture. The economics of dementia and neurodegeneration are now significant enough to demand a national and industrial strategy.

Key Insights

- Brain-health risk reduction is now evidence-based and measurable.
- Stroke, vascular health, and brain health are inseparable.
- Precision neuroscience is moving toward subtype-specific intervention.
- The aging-care workforce is itself a brain-capital constraint.

Strategic Implications

- Health plans and employers can deploy validated brain-health risk-reduction programs.
- Care models must integrate cardiovascular, metabolic, and cognitive risk.
- Capital should flow toward precision diagnostics and subtype-targeted therapy.
- Care-workforce strategy is a brain-economy strategy.

Questions for Leaders

- Q. Does our health benefit reflect modern brain-health risk reduction?
- Q. How are we aligning aging, caregiver, and cognitive-care strategies?
- Q. What is our institutional position on precision-neuroscience partnerships?

Potential Organizational Applications

- Add brain-health risk reduction to corporate wellbeing programs.
- Sponsor research and care partnerships with leading aging-brain centers.
- Plan for an aging workforce with cognitive-friendly role design.

KEY TAKEAWAY

Cognitive lifespan is a strategic asset.

Extending it is now achievable, measurable, and economically necessary.

SESSION · PANEL 4

AI, Data, and the Future of Precision Neuroscience

SPEAKERS & MODERATORS

Cross-disciplinary panel of clinicians, data scientists, and industry partners

Overview

Artificial intelligence is the connective tissue that turns fragmented brain data — imaging, multi-omics, digital phenotypes, and clinical history — into precision subtypes and targeted interventions. The panel showed both the speed of progress and the governance, ethics, and infrastructure required to sustain it.

Key Insights

- AI dissolves the false trade-off between scale and precision in neuroscience.
- Multi-modal data integration is the new clinical horizon.
- Governance, consent, and bias-mitigation are non-negotiable.
- The data infrastructure question is now the rate limit, not the science.

Strategic Implications

- Investors and operators should treat AI-enabled neuroscience as a near-term commercial category.
- Healthcare systems need new data, governance, and partnership operating models.
- Boards must engage seriously with AI risk and ethics in clinical contexts.
- Workforce upskilling around AI-augmented clinical work is urgent.

Questions for Leaders

- Q. Where are our brain-data assets, and who governs them?
- Q. How prepared is our organization for AI-augmented clinical or HR decisions?
- Q. What partnerships unlock data scale we cannot build alone?

Potential Organizational Applications

- Conduct a brain-data inventory and governance assessment.
- Establish or join a cross-institution data trust for brain health.
- Equip leaders with an AI-in-healthcare risk framework.

KEY TAKEAWAY

AI changes the economics of brain science.

Precision neuroscience is moving from research to deployable infrastructure within the planning horizon of most boards.

SECTION 05 · CROSS-SESSION INSIGHTS

Patterns That Recurred

Independent of topic, the same five patterns surfaced across nearly every session. Leaders should treat them as the durable operating principles of the brain economy.

Integration beats isolation.

Health, work, education, technology, and policy systems no longer act independently on brain capital. The leaders winning are stitching them together.

Measurement creates legitimacy.

Brain capital becomes a board topic the moment it is measured. Sentiment without metric does not survive a budget cycle.

The workplace is the scaled clinic.

Employers have access, frequency, and trust no other system possesses. Treating the workplace as a brain-health surface is the highest-leverage move available to most organizations.

Precision is no longer aspirational.

Imaging, omics, digital phenotyping, and AI together have made subtype-specific brain medicine real within the strategic horizon.

Equity is a performance issue.

Brain-economy interventions that fail to reach diverse populations under-deliver economically and clinically. Equity is not an addendum — it is a yield mechanism.

“

The countries, regions, and companies that take brain capital seriously will define the next era of human and economic progress.

— Synthesis · Texas Brain Economy Summit

SECTION 06 · IMPLICATIONS FOR HEALTHCARE

What Leaders in Healthcare Should Do Next

Healthcare leaders are positioned at the center of the brain economy. The shift from reactive disease management to precision brain health is moving from horizon scan to capital plan.

Key Insights

- Brain health is becoming a core service line, not a sub-specialty.
- Precision neuroscience is a multi-decade growth category with near-term revenue signals.
- Integrated cardiometabolic-cognitive care produces better outcomes than siloed care.
- Health systems that own brain-data infrastructure will own brain-health strategy.

Actions Leaders Should Consider

- Stand up a brain-health service-line strategy with five-year economics.
- Invest in multi-modal brain-data governance and tooling.
- Form formal academic-industry partnerships in precision neuroscience.
- Train primary-care and ED clinicians in modern brain-health risk reduction.

RECOMMENDED ACTION**Treat brain health as a strategic service line.**

Boards should expect a brain-health strategy paper with the same rigor as any other major service-line decision.

SECTION 07 · IMPLICATIONS FOR WORKFORCE TRANSFORMATION

What Leaders in Workforce Transformation Should Do Next

The workforce is where the brain economy meets the income statement. Cognitive performance, attention, recovery, and resilience now correlate directly with retention, innovation throughput, and decision quality.

Key Insights

- Cognitive load is now a reportable enterprise risk.
- Mental-health benefits utilization correlates with retention and productivity.
- Behavioral science improves team performance more reliably than process redesign alone.
- AI is reshaping which cognitive capabilities matter most.

Actions Leaders Should Consider

- Add cognitive-load and recovery indicators to engagement reporting.
- Reframe wellbeing investments around measurable brain-capital outcomes.
- Operationalize behavioral science in how teams form, focus, and recover.
- Re-skill managers around AI-augmented judgment and human-in-the-loop design.

RECOMMENDED ACTION

Make brain capital a management discipline.

Leaders who treat brain capital as a management capability — not a benefits package — will outperform on the metrics boards care about most.

SECTION 08 · IMPLICATIONS FOR ARTIFICIAL INTELLIGENCE

What Leaders in Artificial Intelligence Should Do Next

AI is the most consequential cognitive technology of the era. Whether it lifts or diminishes human capability is a question of intentional design — not of model choice.

Key Insights

- AI is a cognitive prosthetic — outcomes depend on how it is deployed.
- Well-designed AI extends judgment, expertise, and creative range.
- Poorly designed AI accelerates cognitive depreciation and skill erosion.
- Governance and ethics frameworks are now table-stakes for any serious deployment.

Actions Leaders Should Consider

- Design AI rollouts around augmentation, not replacement.
- Invest in capability-building so users grow with the tools.
- Establish a board-visible AI risk and ethics framework.
- Treat AI-augmented expertise as the new senior-talent profile.

RECOMMENDED ACTION

Engineer AI for augmentation, not depreciation.

The organizations that compound capability with AI — rather than hollow it out — will own the next decade of knowledge work.

SECTION 09 · IMPLICATIONS FOR EDUCATION

What Leaders in Education Should Do Next

Education is the long-arc brain-economy lever. The institutions that align curriculum, learning environments, and student wellbeing with brain science will define the next generation of human capital.

Key Insights

- Brain-science-informed curricula outperform legacy approaches.
- Student mental health is an academic-performance issue, not a separate program.
- Early-life learning environments compound for decades.
- Workforce-aligned brain-skills education is now an economic-development imperative.

Actions Leaders Should Consider

- Embed brain-science principles in K-12 and higher-ed curriculum design.
- Treat mental health as core academic infrastructure.
- Partner with regional employers and health systems on brain-skills pathways.
- Build educator capability around cognitive and emotional development.

RECOMMENDED ACTION**Build brain-aligned learning at scale.**

Education systems that integrate brain science will compound regional brain capital for a generation.

SECTION 10 · IMPLICATIONS FOR PUBLIC POLICY

What Leaders in Public Policy Should Do Next

Brain capital is the next great public-infrastructure category. Treating it that way — with measurement, investment, and accountability — is now feasible at city, state, and national levels.

Key Insights

- Brain capital correlates with GDP, public health, and civic resilience.
- Policy levers exist today in education, healthcare, labor, and economic development.
- Regional ecosystems (e.g., Houston / TMC) demonstrate how to coordinate.
- Public-private alignment determines how quickly policy translates to outcomes.

Actions Leaders Should Consider

- Establish brain-capital indicators in public health and economic dashboards.
- Coordinate cross-agency policy around early childhood, workforce, and aging.
- Sponsor public-private brain-economy ecosystems with measurable mandates.
- Embed brain capital in economic-development incentives and reporting.

RECOMMENDED ACTION**Treat brain capital as public infrastructure.**

Cities and states that codify brain capital in public strategy will outperform peers on growth, health, and civic capacity.

SECTION 11 · INVESTMENT & INNOVATION

Where Capital Should Flow

The summit made a clear case that brain-economy investment has moved from philanthropic to commercial. Capital allocators — corporate, venture, sovereign, and civic — now have a deployable opportunity set across six categories.

CATEGORY	WHY IT MATTERS	EXAMPLE PLAYS
Precision neuroscience	Multi-modal data + AI is collapsing diagnostic ambiguity.	Subtype-targeted therapy, AI imaging, biomarker platforms.
Workplace brain health	Largest scaled intervention surface in the economy.	Behavioral-science platforms, manager enablement, cognitive-load tooling.
Early-childhood mental health	Highest economic multiplier in the stack.	Caregiver mental-health platforms, pediatric integration, parenting-skill technology.
Healthy aging	Demographic certainty + clinical urgency.	Risk-reduction programs, cognitive-decline diagnostics, care-workforce models.
AI cognitive infrastructure	Foundational layer for every brain-economy application.	Multi-omics integration, governance, model-evaluation infrastructure.
Brain-skills education	Long-arc compounding return on human capital.	Brain-aligned curriculum, educator capability, workforce reskilling.

FUTURE OPPORTUNITY

A brain-economy investment thesis is now defensible.

Allocators can build a coherent multi-vehicle thesis across precision neuroscience, workplace brain health, healthy aging, and AI cognitive infrastructure with credible near-term and long-arc returns.

SECTION 12 · FUTURE OPPORTUNITIES

A Leadership Agenda

The summit closed by pivoting from analysis to agenda. The opportunities below are not speculative — each was identified by multiple leaders, across sectors, as actionable within the next 24 months.

01 A Houston Brain Capital Initiative A coordinated, multi-institution platform anchored at TMC, integrating clinical, academic, employer, civic, and investor capacity to position Houston as the global brain-economy capital.	02 Employer Brain-Health Standards A shared set of brain-capital metrics, benchmarks, and reporting standards employers can adopt to make brain health a comparable, accountable, board-level discipline.
03 Brain-Economy Workforce Pathways New career pathways at the intersection of neuroscience, AI, behavioral science, and care — designed in partnership between universities, employers, and health systems.	04 Precision-Neuroscience Data Trusts Federated, governed data infrastructure that enables multi-institution brain-data collaboration without compromising consent, equity, or sovereignty.
05 Caregiver and Early-Childhood Investment Vehicles Capital pools — public, private, and blended — explicitly aimed at the highest-multiplier brain-capital category.	06 AI-Augmented Clinical and Workforce Models Operating models that demonstrate how AI extends — rather than replaces — human cognitive capacity in clinical, educational, and managerial contexts.

SECTION 13 · CLOSING REFLECTIONS

From Insight to Action

The Texas Brain Economy Summit did not produce a list of conclusions. It produced a **mandate**.

The mandate is that the brain — as health, as skill, and as collective capacity — is the defining input of the next economy. The countries, cities, companies, and institutions that organize themselves around that fact will outperform those that don't. The evidence, the technology, the capital, and the coalitions are converging now.

For executive leaders, the question is no longer whether the brain economy will reshape your sector. It is whether you will help shape *it*. The window for shaping it is open, and it is finite.

“

The brain is the most valuable, the most underinvested, and the most strategic asset we have. The brain economy is how we finally treat it that way.

— Closing Synthesis · Texas Brain Economy Summit 2026

Three Commitments for Leaders

- **Measure it.** Add brain-capital indicators to your enterprise dashboard within the next planning cycle.
- **Invest in it.** Allocate capital to at least one brain-economy category — precision neuroscience, workplace brain health, early childhood, or AI cognitive infrastructure.
- **Partner on it.** Join, or convene, a cross-sector brain-economy coalition in a region where you operate.

SECTION 14 · APPENDIX

References & Acknowledgments

About This Report

This Executive Insights Report is a synthesis of sessions, panels, and keynotes presented at the Texas Brain Economy Summit 2026, hosted in Houston, Texas. It is designed as an executive companion — not a transcript — and is intended for distribution to senior leaders across industry, healthcare, academia, government, and capital markets.

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